2026 E-Commerce Trends Report

A market in motion.
Two sides of the story.

Track the forces shaping the future of the industry.

For businesses | **For shoppers**

Inside this report.

This report explores what shoppers want and how businesses respond across eight key areas shaping e-commerce today.

Click the arrows to navigate to each section.

Eight chapters to turn insights into action

Six chapters to dig into the data

What shoppers expect. What businesses deliver. The gap in between.

Across the world's most active e-commerce markets, one pattern is emerging: expectations are often outpacing execution. This gap is creating friction for shoppers – and opportunity for businesses bold enough to close it.

Explore the report. Close the gap.

Ready to see where you stand?
Connect with one of our experts to unlock the full findings.

Find out more

TOM
CHEESEWRIGHT
APPLIED FUTURIST

Find out more

Applied Futurist Tom Cheesewright, brings the future into focus. He works with global corporations, governments and industry bodies to pinpoint where emerging trends will drive the biggest changes in business and society. He has provided his thoughts on our findings throughout the report.

The icons below will be displayed throughout the report to guide you through insights on generational shopping patterns, distinct shopper profiles, and multiple business models, including clear differentiation between traditional B2C and B2B e-commerce.

29,000
Online shoppers surveyed

- Gen Z
- Millennials
- Gen X
- Baby Boomers

- Convenience shopper
- Deal seeker
- App-first shopper
- Global shopper
- Eco shopper
- Secondhand shopper
- Easily influenced shopper
- Social shopper
- Brand lover
- AI-assisted shopper
- Subscription shopper
- Hands-free shopper

5,800
E-commerce businesses surveyed

- B2B business
- B2C business
- Hybrid business

- Sole trader
- Micro enterprise
- Small enterprise
- Medium enterprise
- Large enterprise

- Social media seller
- Marketplace seller
- Subscription seller
- Cross-border seller
- Eco-friendly seller
- Pre-owned / refurbished seller

Across 29
global countries

- Argentina
- Australia
- Austria
- Belgium
- Brazil
- Canada
- China
- Czech Republic
- Denmark
- France
- Germany
- India
- Ireland
- Italy
- Malaysia
- Morocco
- Netherlands
- Nigeria
- Poland
- Portugal
- Saudi Arabia
- South Africa
- Spain
- Sweden
- Thailand
- Türkiye
- UAE
- UK
- USA

- Global total

Across 6 regions

APAC		LATAM	MENA	NA	SSA
Asia-Pacific	Europe	Latin America	Middle East and North Africa	Noth America	Sub-Saharan

1. The e-commerce landscape

A diverse shopping landscape is reshaping the path to purchase for consumers and businesses.

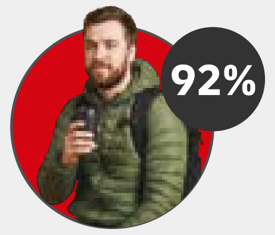
Spot the gaps and opportunities.

Get to know the people and the businesses behind the purchases

Shoppers are spreading their behavior across multiple motivations and channels – but are businesses always present where demand is strongest? While choice is expanding, logistics and price remain the most powerful motivators.

The statement that resonates most with shoppers

Most shoppers align with more than one shopper type – four on average.

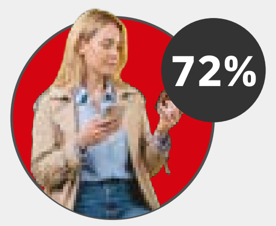


Convenience shoppers

"Above all, I want fast, free delivery and easy returns."

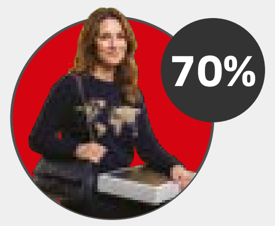
Deal seekers

"I'm always hunting for the best price."



App-first shoppers

"I shop mainly through retailers or marketplace apps."

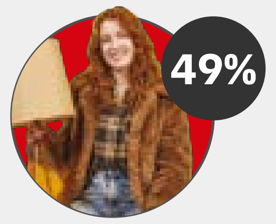


Global shoppers

"I have purchased from retailers outside my own country."

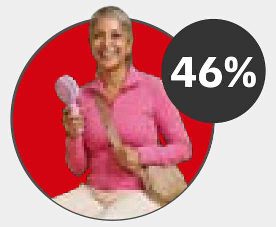
Eco shoppers

"I choose sustainable products or delivery options."



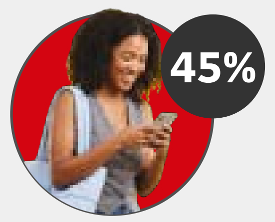
Secondhand shoppers

"I have purchased refurbished or pre-owned items online."



Easily influenced shoppers

"I have made a purchase from shoppable ads online or on TV."

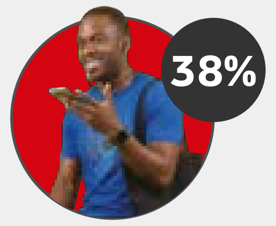


Social shoppers

"I have purchased via TikTok, Instagram or Facebook."

Brand lovers

"I prefer premium or designer brands."

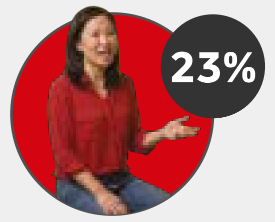


AI-assisted shoppers

"I have used AI-powered chat or virtual assistants to browse or buy."

Subscription shoppers

"I use auto-replenish or item subscription services."



Hands-free shoppers

"I have used voice commands or smart speakers to shop."

All the ways businesses let shoppers browse and buy online from them.

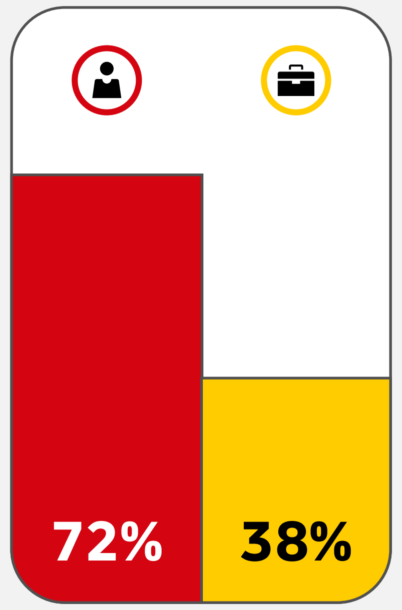
Businesses sell across an average of three platforms.

	💼
Own e-commerce website	**65%**
Social media	**63%**
Marketplaces	**54%**
Shoppable ads	**43%**
Own app	**38%**
Through AI-powered chat or virtual assistants	**35%**
Via voice commands / search	**26%**
On a product subscription basis	**24%**

The app gap

72% of shoppers are app-first shoppers yet only **38%** of businesses offer browsing and buying via their own app.

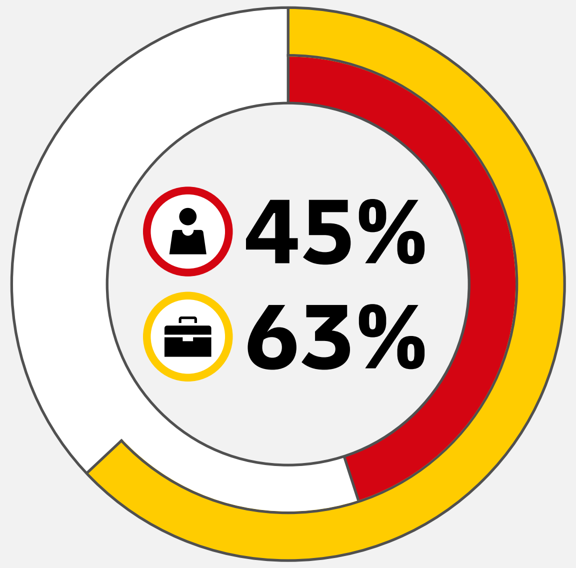
A different story in Latin America where 85% of shoppers choose apps.



Not-so-social shopping

63% of businesses sell on social yet only **45%** of shoppers buy through social media.

A different story in Asia Pacific where 66% of shoppers buy through social media channels.



E-commerce growth is certain. But where will it come from?

On both sides of the equation, Türkiye, Nigeria, and Malaysia consistently outperform the global average across all platforms. Meanwhile, Thailand, the UK and the Netherlands stand out as markets where shoppers expect to browse and buy more across multiple channels at above-average rates.

For businesses, the opportunity lies in balancing proven and emerging channels. Marketplaces currently show the closest alignment between shopper and business expectations (**34%** vs **54%**), making them a strong foundation for growth, while newer channels should be scaled selectively in markets where consumer behavior is already moving ahead of the global norm.

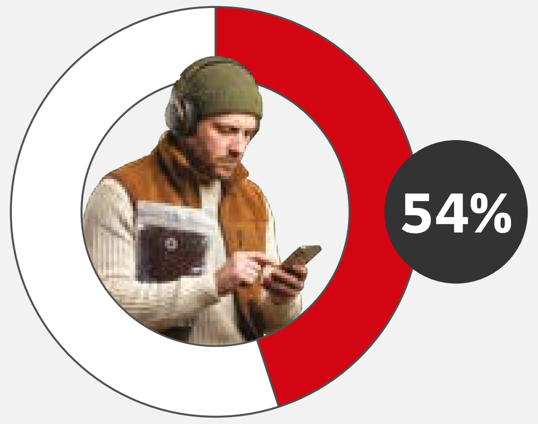
In the next five years, where do shoppers expect to browse and buy "more"? And how do businesses expect their customers' behavior to change in that time?

	Shoppers	Businesses
Online Marketplaces	**34%**	**51%**
Apps	**32%**	**55%**
Retailer Websites	**32%**	**63%**
Social Media	**24%**	**64%**
AI-Powered Chat / Virtual Assistants	**23%**	**59%**
Shoppable Ads	**17%**	**51%**
Product Subscriptions	**16%**	**45%**
Voice Commands / Seach	**15%**	**42%**
International Retailers	**23%**	**40%**

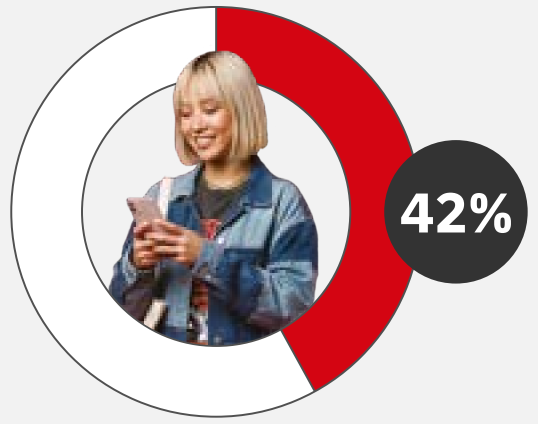
See the full shopper survey breakdown

See the full business survey breakdown

> "In a future where technology is the great equalizer, there is a challenge of being 'too' frictionless. Build in some moments of connection, building brand and trust, or customers will slip through your fingers just as easily as they slip through the shopping process."
>
> ***Tom Cheesewright***

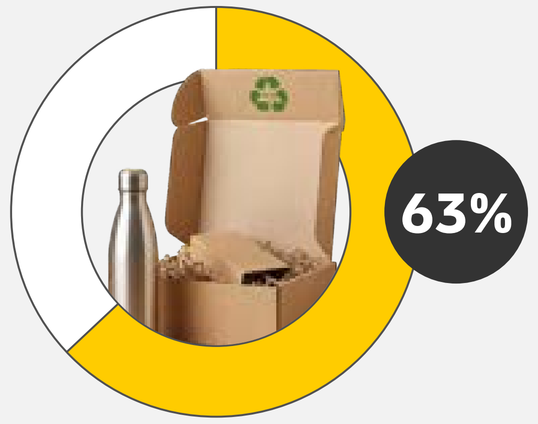


54% of subscription shoppers are planning to shop more via apps

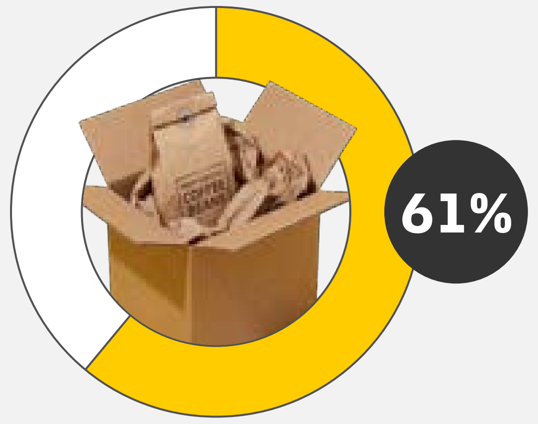


42% of Gen Z are planning to shop more on marketplaces

39% of Millennials are planning to shop more on marketplaces



63% of eco-friendly sellers are planning to sell more on marketplaces



61% of subscription sellers are planning to sell more via an app

The social commerce disconnect.

Businesses chase reach, while shoppers choose trust. We've seen that there is a "buy now" gap emerging between businesses and shoppers as **63%** of retailers are selling on social platforms yet only **45%** of shoppers are buying through social media channels. While brands focus on ads and influencers to reach more people, shoppers care more about what feels real. Reviews, customer content and honest opinions matter more than paid promotion.

Where you are and how old you are shape which platforms matter most. Video-first platforms lead in high-growth markets. TikTok dominates amongst **96%** of Malaysian and **93%** of Thai shoppers, while YouTube drives engagement amongst **71%** of shoppers in India, ahead of **41%** in USA and UAE. Instagram also plays a big role in countries like Türkiye, India and Brazil.

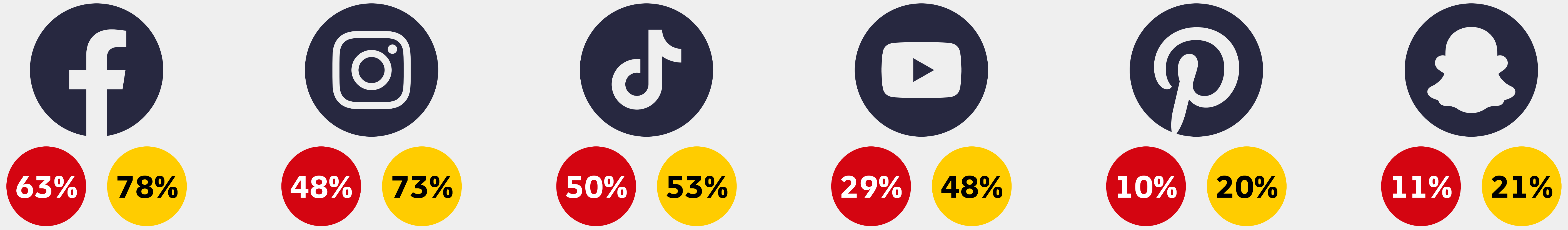
Elsewhere, Facebook remains the go-to, particularly in Nigeria and Morocco where **86%** of shoppers browse and buy through the platform, and parts of Europe, such as **63%** of shoppers in the Czech Republic and Denmark. Snapchat, while smaller globally, used by only **11%** of shoppers, spikes in Saudi Arabia and France.

Age matters too. Millennials, Gen X and Baby Boomers lean towards Facebook, while Gen Z is split between Instagram and TikTok.

The social channels to buy and sell from

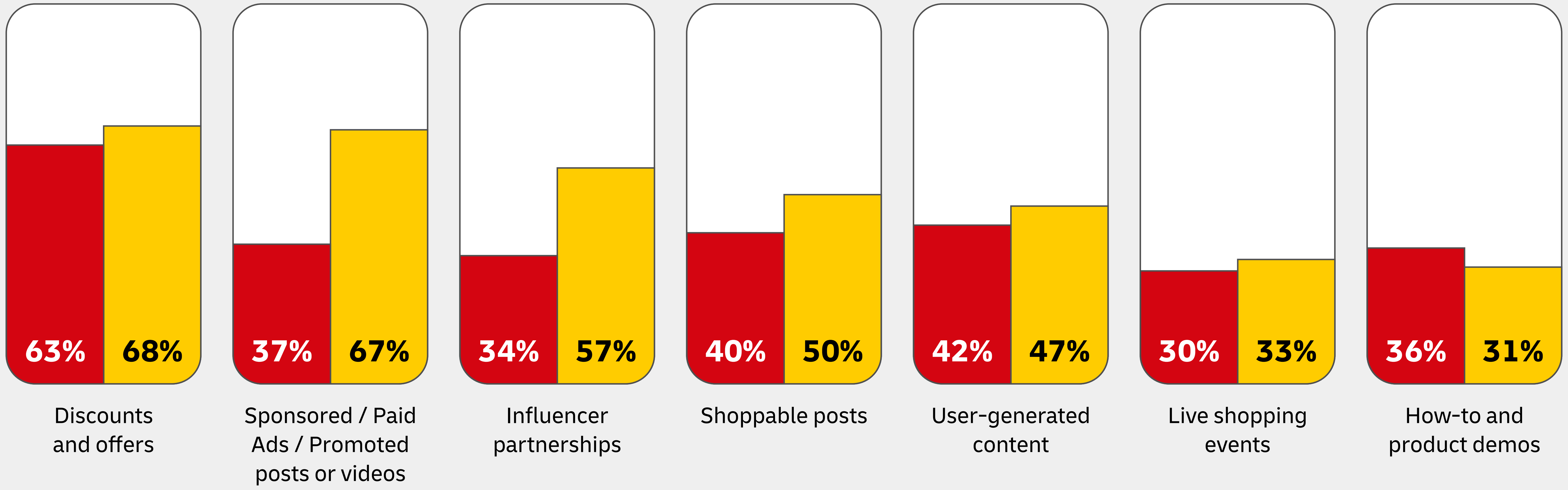
See the full data including China

🔴 Which channels have shoppers purchased from?
🟡 Which channels have businesses sold on?



The content influencing and driving sales

🔴 What type of social content influences shoppers' purchasing decisions?
🟡 What type of social media activity do businesses produce to drive sales?



Established marketplaces hold ground as challenger adoption accelerates.

Marketplaces remain central to e-commerce: **82%** of shoppers expect to use them the “same amount” or “more” over the next five years, and **90%** of businesses anticipate growth or stability. Shoppers remain loyal to established marketplaces, but adoption of challenger platforms is accelerating faster than businesses are adapting, widening the gap between consumer behavior and business focus.

To explore how this plays out locally, see the global and European infographics highlighting the most popular marketplace platforms in each market.

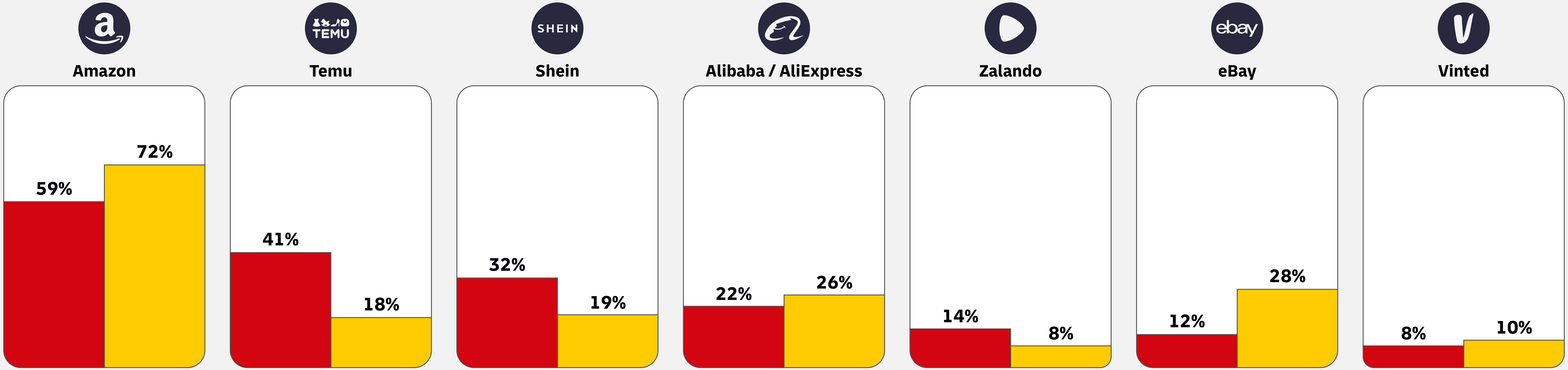
See the Global marketplace infographic

See the European marketplace infographic

What marketplaces are shoppers buying from and businesses selling on?

🔴 What marketplaces do shoppers use?

🟡 What marketplaces do businesses sell on?



Customer-to-customer is going mainstream and out-of-home is powering it.

Over **1 in 2** shoppers have sold something via an online marketplace.

As C2C activity grows, the line between shopper and seller is increasingly blurred. Millennials and secondhand sellers are leading the charge, with **3 in 5** selling to their peers. Europeans are also the most active globally, with **57%** selling on marketplaces.

To succeed in C2C commerce, convenient out-of-home drop-off and collection locations are central to the sale.

Top 10 destinations shoppers have sold something via an online marketplace and their preferred sending method

Destination		Sending method	
Germany	67%	Parcel shops	39%
Netherlands	67%	Parcel lockers	37%
Denmark	65%	Parcel shops	39%
France	63%	Parcel shops	47%
Sweden	62%	Parcel shops	42%
China	61%	Parcel lockers	65%
Italy	61%	Parcel shops	39%
Switzerland	59%	Collection	46%
Austria	58%	Parcel shops	34%
Argentina	57%	Collection	54%

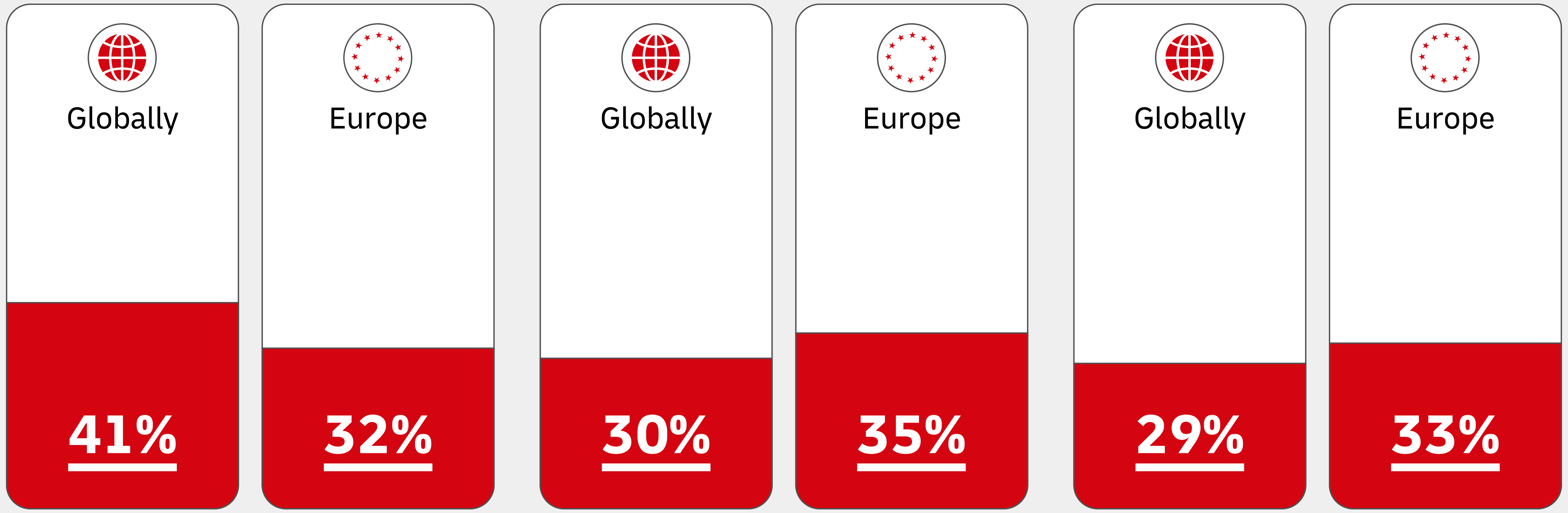
How do shoppers send the items they have sold on marketplaces?

See the full data in the appendix

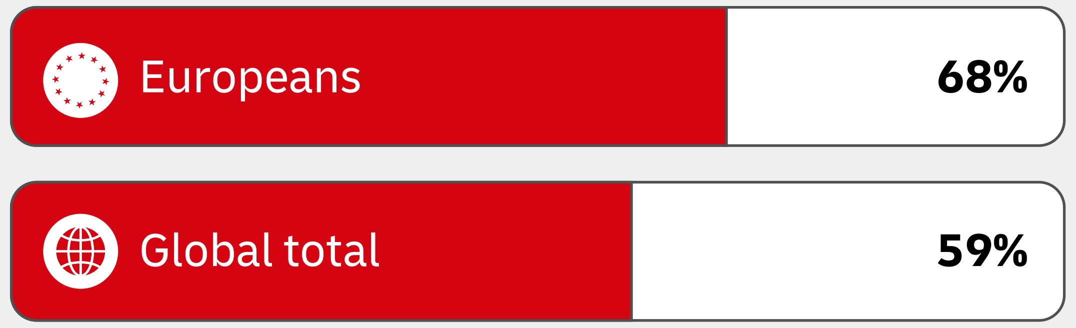
Collection only

Parcel lockers

Parcel shops



68% of European shoppers and **59%** globally are sending their sold items via out-of-home locations.



> "The lines between B2C and C2C will be increasingly blurred in the future as AI coding tools reduce the advantage of established platforms and enable individuals to create super-competitive shopfronts – if agent to agent AI trading means visual shopfronts are even a thing anymore."
>
> ***Tom Cheesewright***

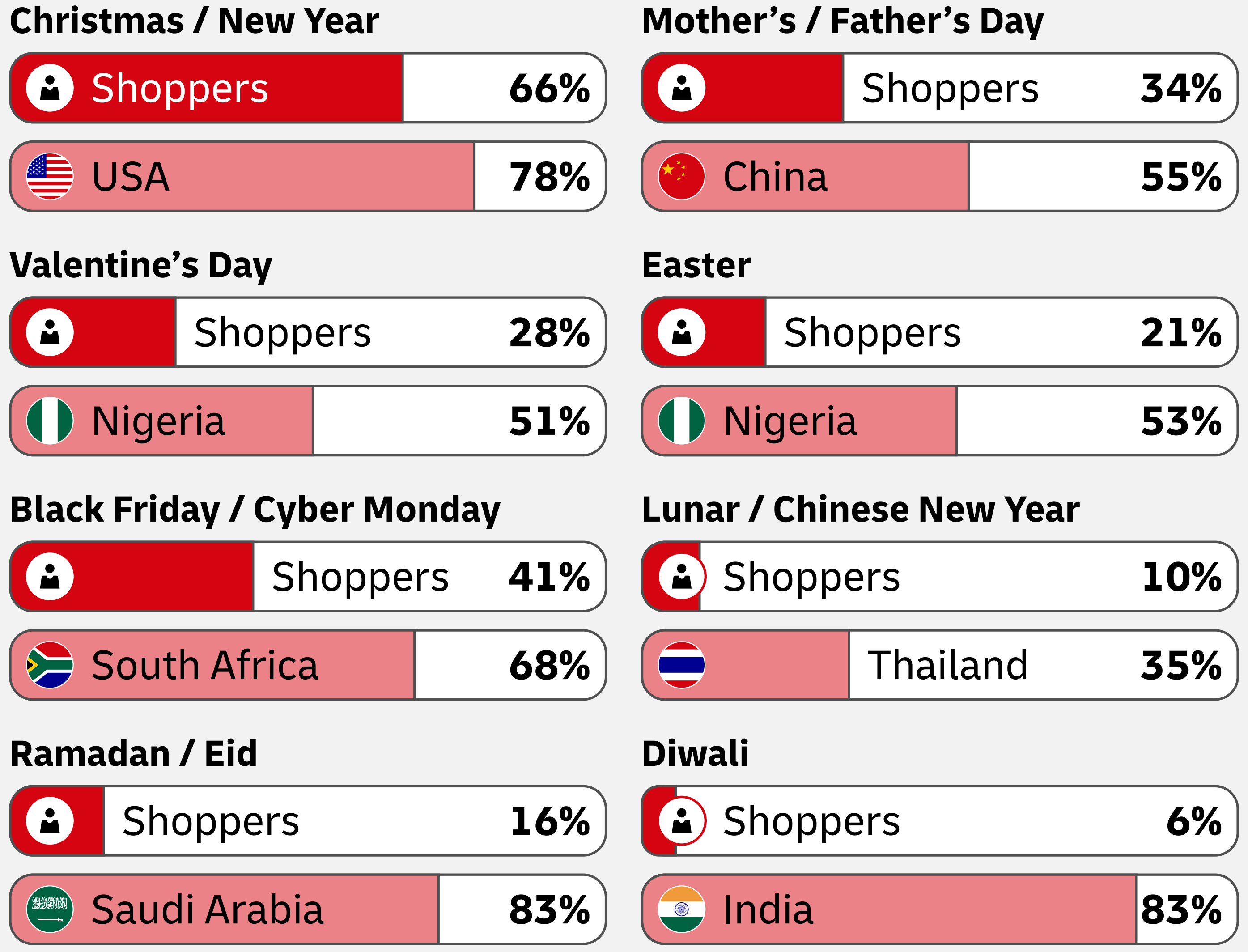
Businesses bet big on seasonal sales but shoppers aren't fully convinced.

Younger shoppers are more open to these offers, but trust declines with age, falling from **60%** among Millennials and Gen Z to just **42%** among Baby Boomers. Interestingly, smaller businesses tend to be more realistic about this. Just over half believe shoppers trust seasonal discounts, compared to more than **80%** of larger companies.

One thing is for sure: businesses are more ambitious about the future of seasonal sales and more confident that customers trust their offers.

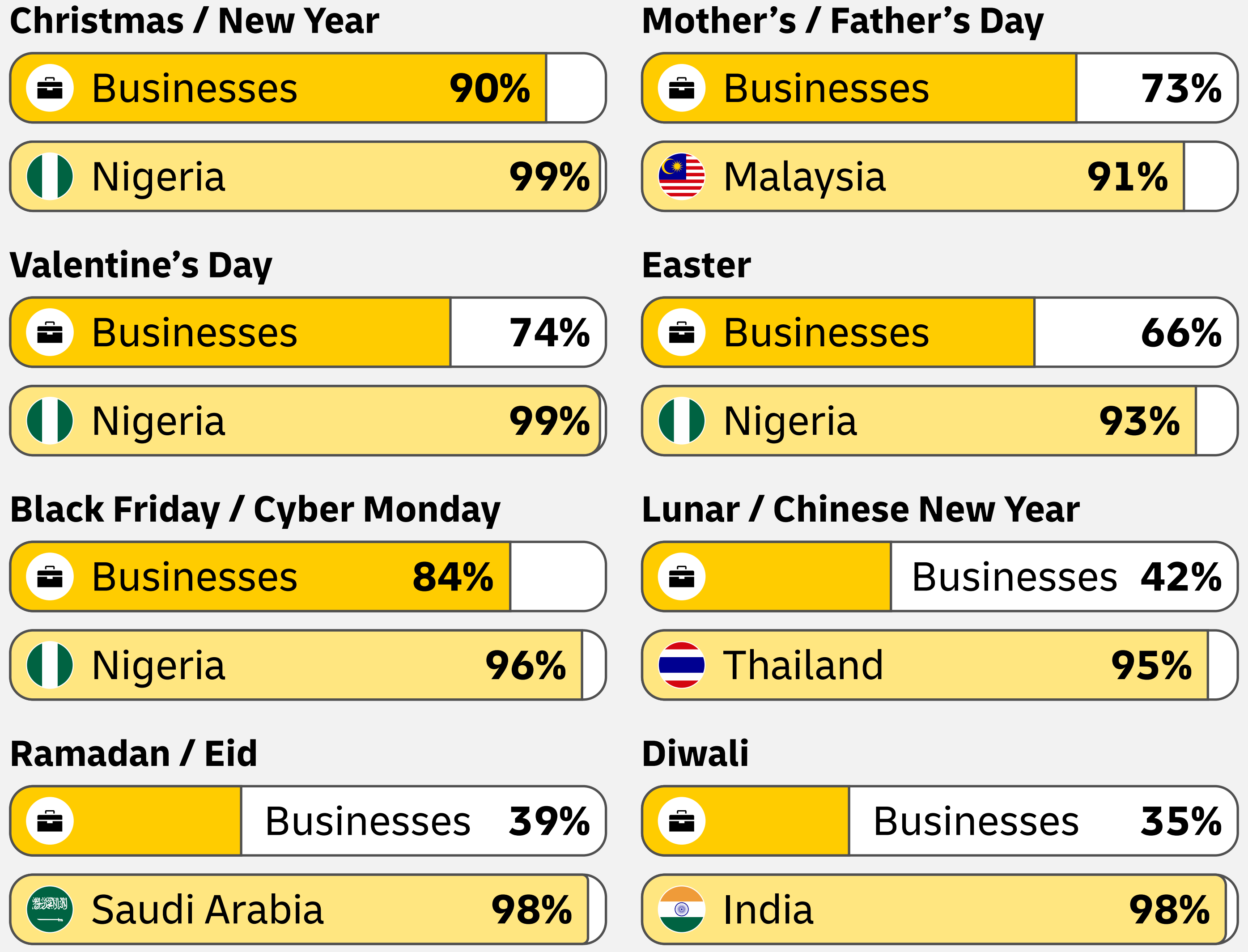
In the past 12 months, during which of the following seasonal holidays have shoppers made purchases?

Global total shown in the graph and the country flag represents the country participating the most.



During which global or cultural shopping events do businesses run special promotions?

Global total shown in the graph and the country flag represents the country participating the most.

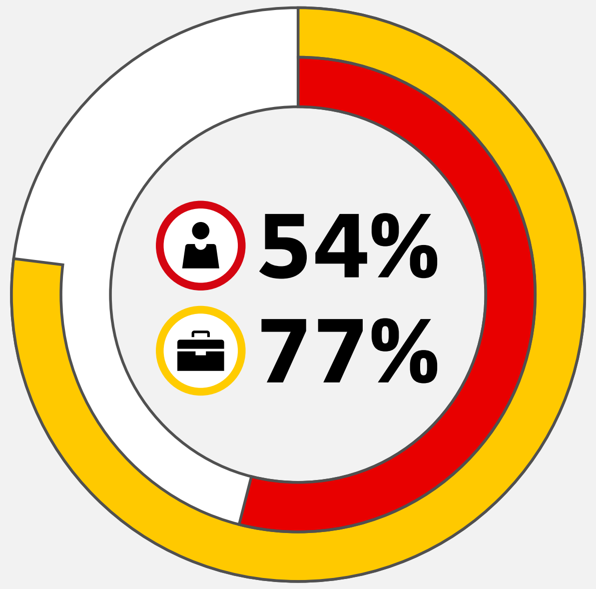


18% of shoppers will purchase "more" during the seasonal holidays over the next 5 years.

45% of businesses think their seasonal sales will "increase" over the next 5 years.

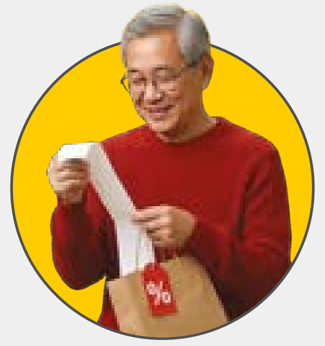
Shoppers' trust in seasonal offers vs. what businesses believe customers trust

- How much do shoppers trust the offers and prices from retailers?
- How much do businesses think shoppers trust the offers and prices from them?



Sceptical savers

Just 13% of deal seekers don't trust seasonal offers, the highest of any group. The shoppers chasing discounts the most are also the hardest to convince.



Get to know deal seekers

> "The information gap between retailer and customer has been shrinking from the dawn of the digital age and now it has reversed: consumers are often better informed about product quality, pricing, and offers than the seller. Re-establishing trust in the future means acknowledging this, being transparent, and finding new ways to add value – even being dynamic in pricing offers in response to market signals."
>
> ***Tom Cheesewright***

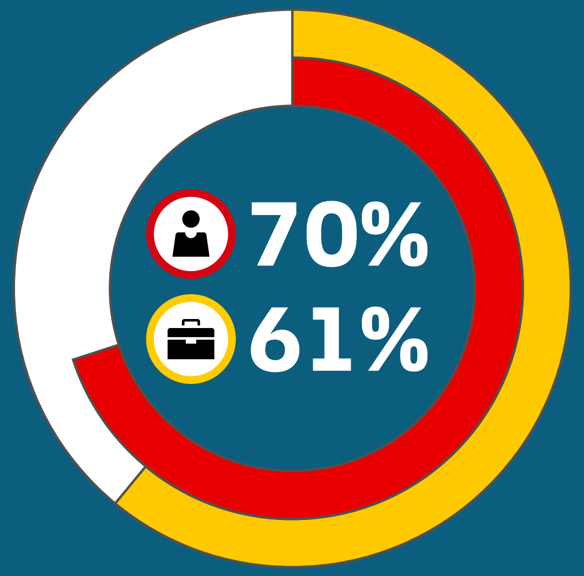
2. Cross-border shopping

Shoppers and businesses are borderless.

While shoppers tend to gravitate toward a small number of major markets, like the USA and China, many English-speaking markets still haven't adapted their full e-commerce experience for international shoppers. **22%** of Canadian, **21%** of US, and **18%** of UK B2C businesses do not localize e-commerce with local languages and currencies, highlighting the gap between global demand and how businesses serve it.

Younger, tech-enabled shoppers are driving cross-border shopping, with **53%** of both Gen Z and Millennials buying internationally more than once a month, compared to **45%** of shoppers globally. Thailand leads weekly international shopping at **34%**, followed by India at **32%**, while **70%** of hands-free shoppers already buy across borders regularly.

Shoppers buying internationally vs. businesses selling across borders



Top 10 destinations shoppers buy from

International shopping is up **+10%** year-on-year (60% in 2025) and **45%** of shoppers buy across borders more than once a month.

China	59%
USA	32%
Germany	23%
UK	17%
France	13%
Spain	10%
Italy	8%
Netherlands	6%
Türkiye	6%
Australia	5%

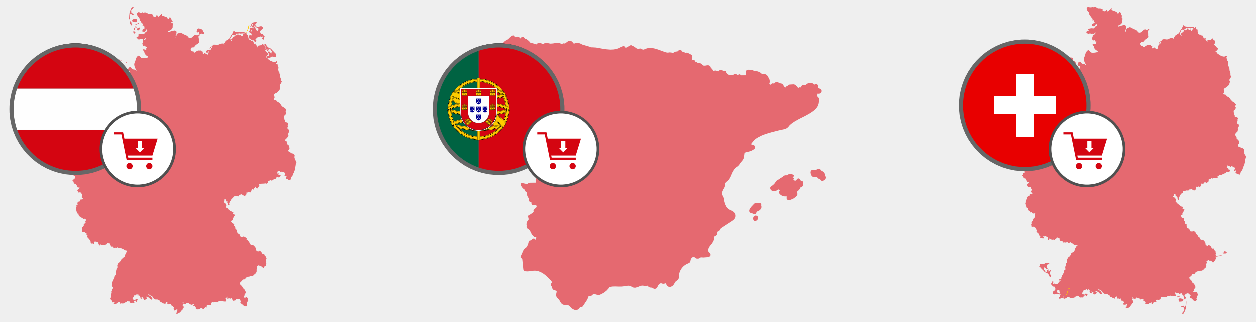
Top 10 destinations businesses sell to

Over **3 in 10** orders are now shipped internationally, and among businesses not yet selling across borders, **29%** plan to prioritize cross-border capabilities within the next 12 months.

France	43%
Germany	43%
USA	35%
UK	34%
Canada	30%
Italy	30%
Spain	28%
Australia	25%
Belgium	24%
China	24%

The pull of proximity

Cross-border often means next door for European shoppers.

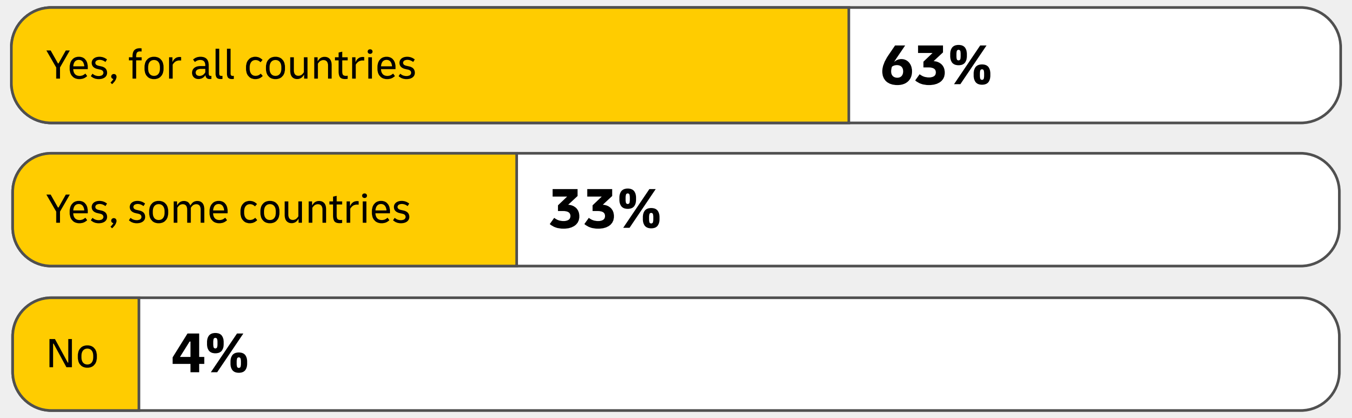


77% of Austrian shoppers buy from Germany

63% of Portuguese shoppers buy from Spain

72% of Swiss shoppers buy from Germany

Are businesses offering their e-commerce store in local languages and currencies for international shoppers?



Yes, for all countries	63%
Yes, some countries	33%
No	4%

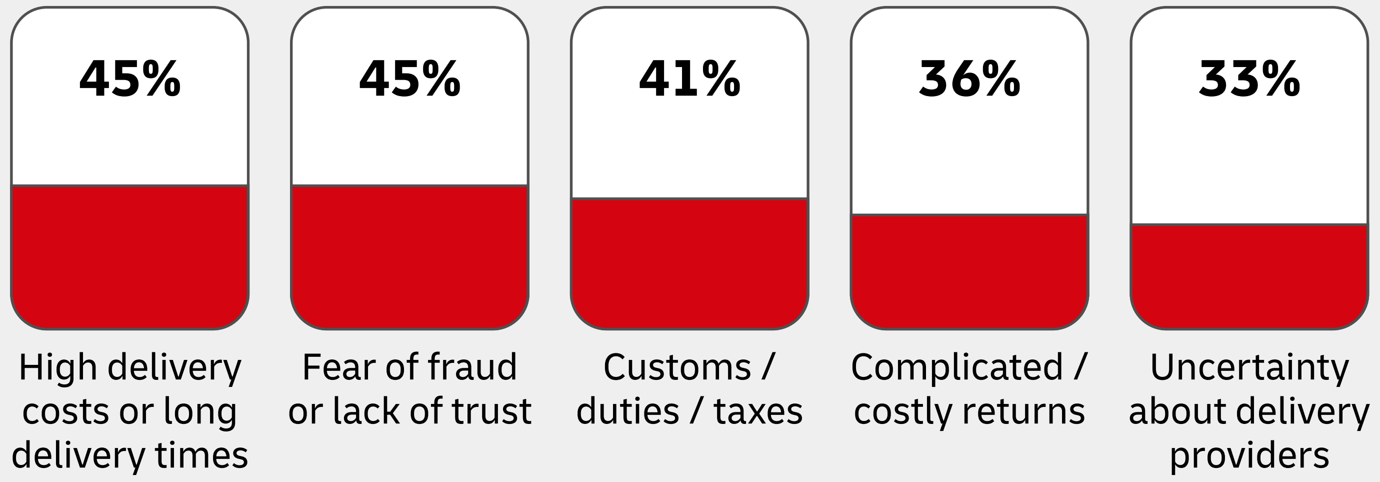
Delivery and customs are the deal-breakers in cross-border e-commerce.

International demand is driven by price and quality, but delivery and logistics ultimately decide whether a purchase happens. High delivery costs, long transit times, customs complexity, and returns friction are the biggest barriers holding both shoppers and businesses back.

The next phase of cross-border growth will be won by brands that make international delivery feel as seamless as domestic.

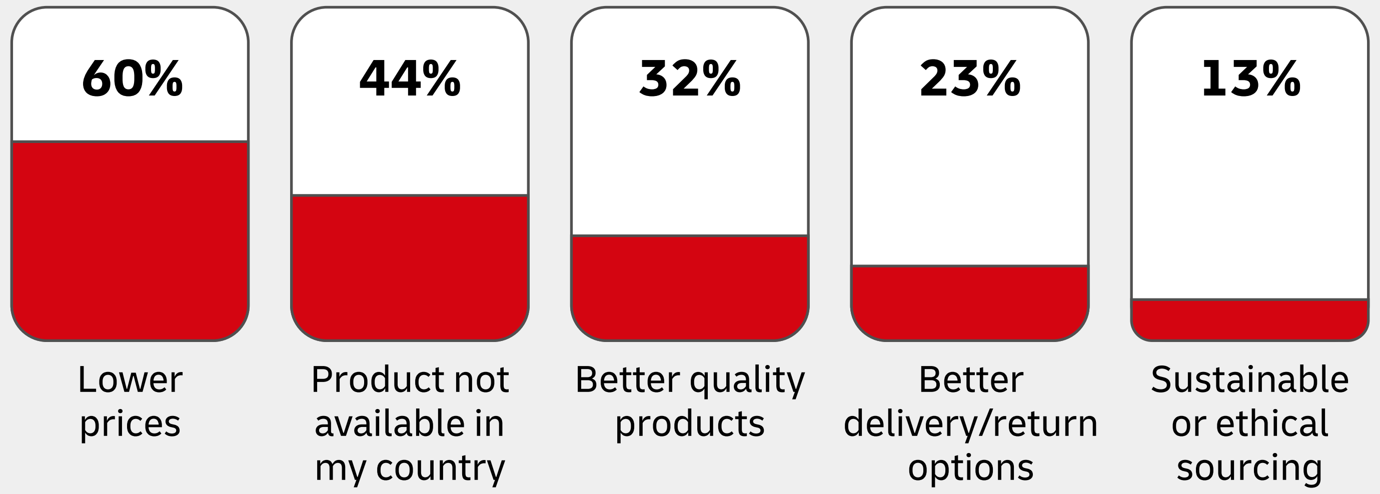
> “Measured against the broad arc of history, the current period of hard borders and high tariffs is an anomaly. In the future, barriers will fall again, automatic translation and slick payment infrastructure will further reduce the friction in cross-border commerce. As a retailer your competitors are increasingly global.”
>
> ***Tom Cheesewright***

Top 5 reasons shoppers don’t buy internationally



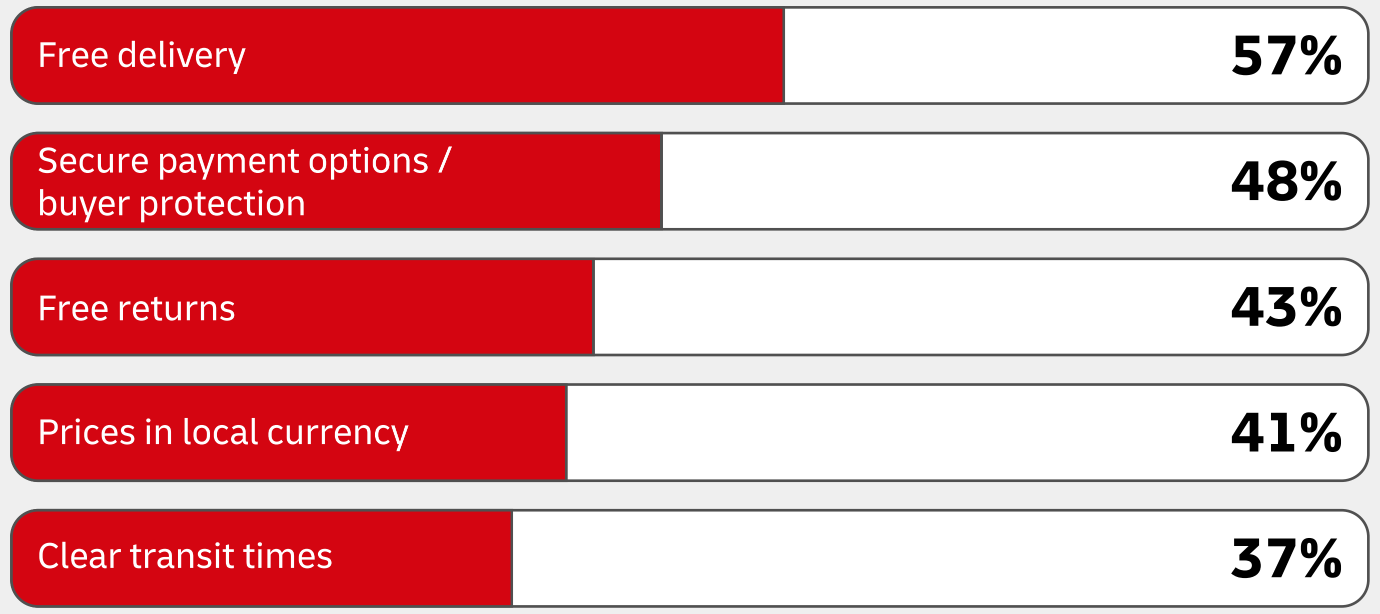
45%	45%	41%	36%	33%
High delivery costs or long delivery times	Fear of fraud or lack of trust	Customs / duties / taxes	Complicated / costly returns	Uncertainty about delivery providers

Top 5 reasons shoppers do buy internationally



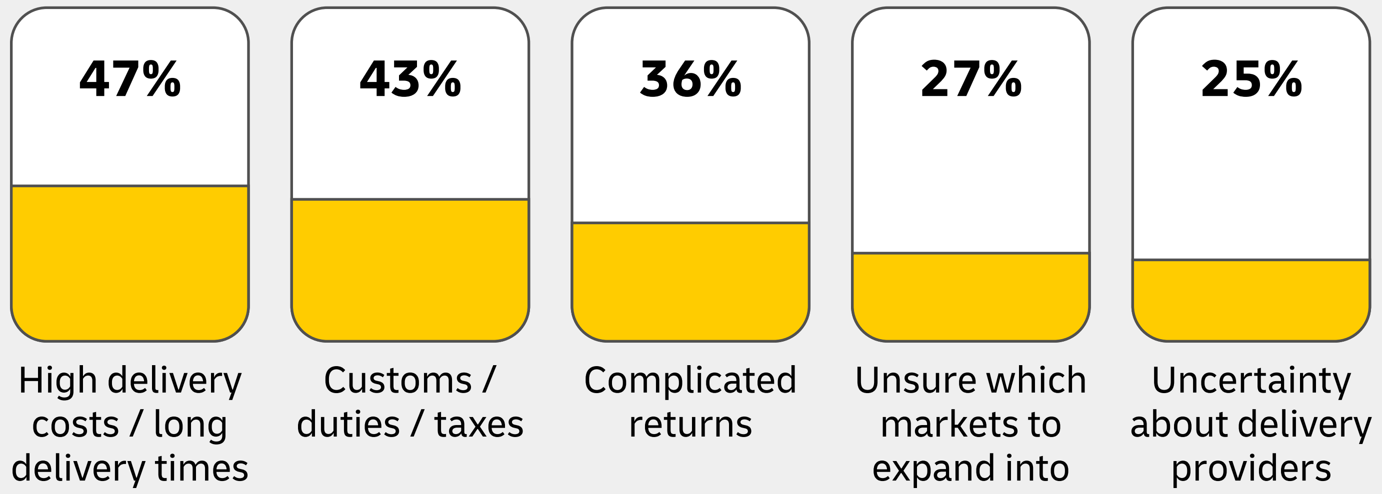
60%	44%	32%	23%	13%
Lower prices	Product not available in my country	Better quality products	Better delivery/return options	Sustainable or ethical sourcing

What would make shoppers purchase from a retailer in another country over the next five years?



Free delivery	57%
Secure payment options / buyer protection	48%
Free returns	43%
Prices in local currency	41%
Clear transit times	37%

Top 5 reasons businesses don’t sell internationally



47%	43%	36%	27%	25%
High delivery costs / long delivery times	Customs / duties / taxes	Complicated returns	Unsure which markets to expand into	Uncertainty about delivery providers

Top 10 destinations businesses are looking to sell to in the next 5 years

Europe is set to rival the global main stage.

France	30%
Germany	30%
USA	29%
UK	25%
Spain	22%
Canada	19%
China	19%
Italy	18%
Australia	16%
Austria	13%

B2B trade follows proven paths.

When businesses sell to other businesses across borders, they usually stick to familiar markets.

In Europe, much of this trade happens within the region, with countries trading heavily with their neighbors. Germany plays a central role, acting as a key hub for both imports and exports.

And its importance is only growing. Of the businesses that don't yet sell internationally, **40%** say they plan to expand into Germany within the next five years.

Italy 72%

Poland 70%

Czech Republic 65%

Importing

Germany

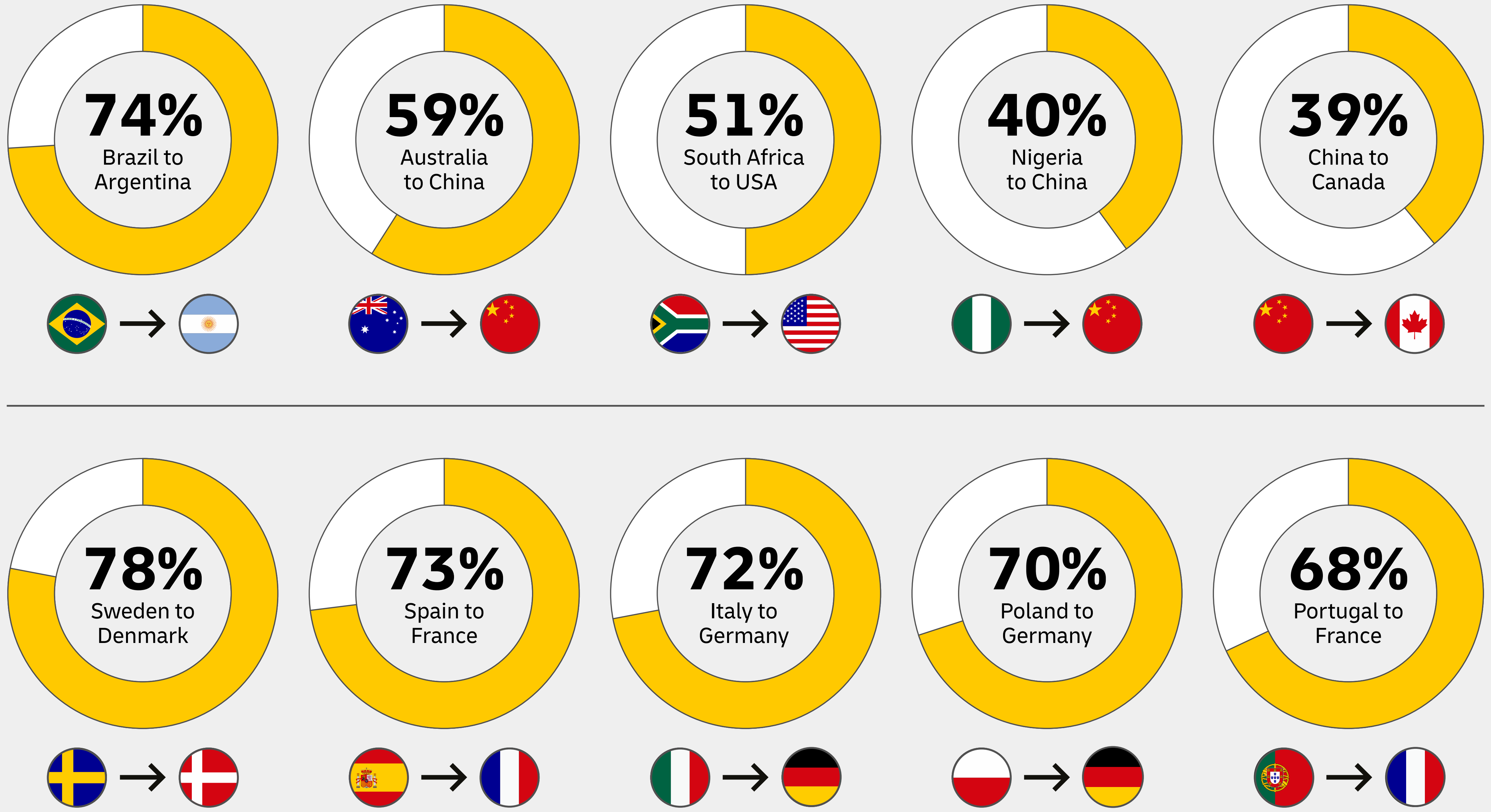
Exporting

Austria 67%

France 49%

Belgium / Netherlands 42%

The top 5 lanes for B2B trade globally and across Europe



74% Brazil to Argentina

59% Australia to China

51% South Africa to USA

40% Nigeria to China

39% China to Canada

78% Sweden to Denmark

73% Spain to France

72% Italy to Germany

70% Poland to Germany

68% Portugal to France

The countries that online B2B retailers expect to sell to over the next five years

Expansion ambitions are accelerating beyond Europe. 83% of South African businesses not yet selling internationally plan to expand within the next five years, targeting major markets like the USA, China, France, and India.

Does supply travel as far as demand?

What shoppers want largely matches what businesses sell. Clothing, electronics and beauty are the most popular categories on both sides, suggesting supply is meeting demand.

Looking at where this trade is happening, Saudi Arabia and Switzerland emerge as export powerhouses, leading demand for many of the top product categories sold internationally. On the shopper side, Indian shoppers are driving purchasing across nearly every major category, making India one of the most influential demand markets in cross-border online shopping.

However, other countries have more specialized strengths. The Netherlands leads in electronics exports with **54%** and also tops clothing imports with **71%**, while Türkiye stands out across import categories including footwear, cosmetics and toiletries, and food and beverages.

B2B

When it comes to B2B selling, electronics takes the No.1 spot and office supplies ranks 5th over sports and hobby.

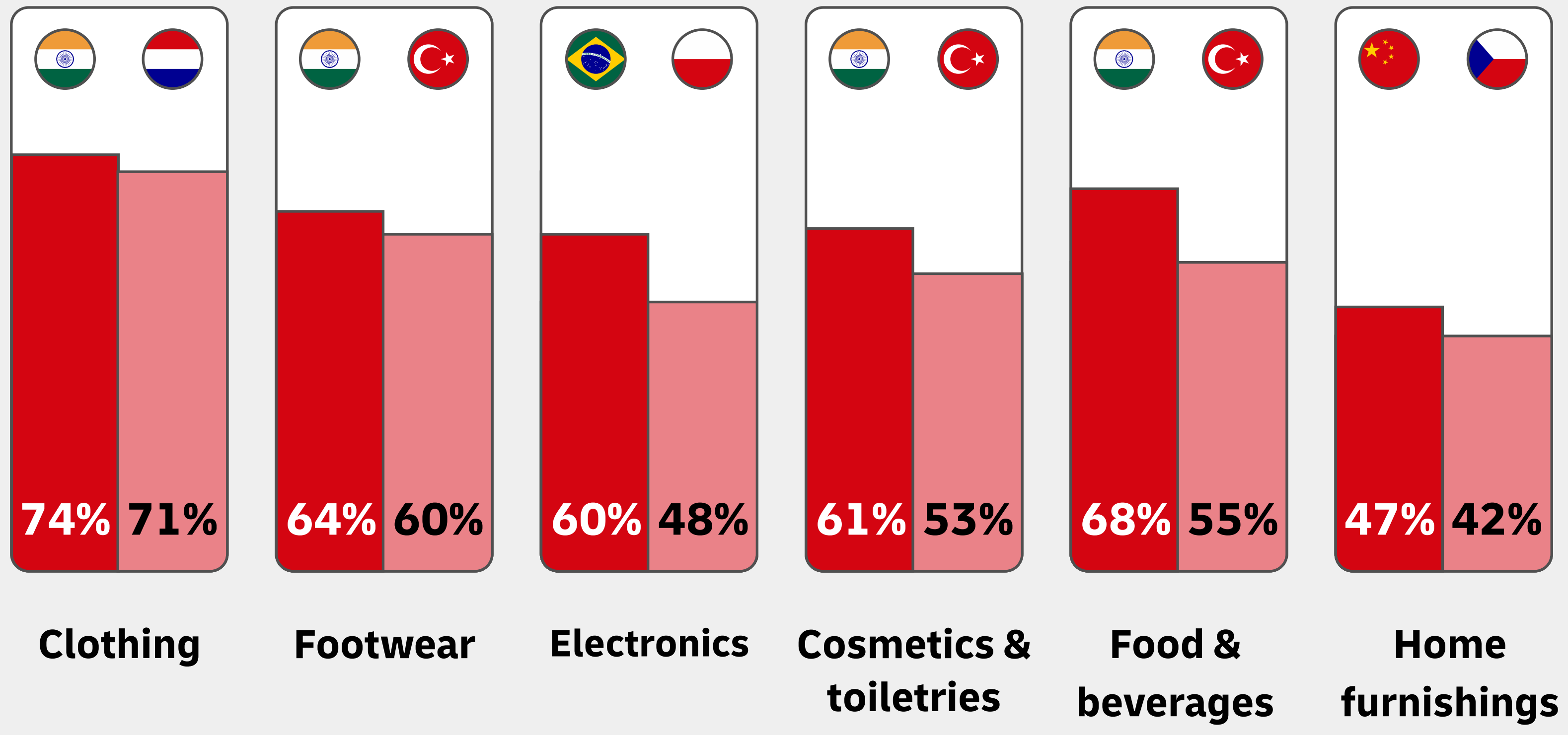
Global shoppers

These shoppers are the most open to purchasing from international retailers – they are influenced by trust in delivery providers, the convenience of digital payments, and incentives like free delivery.

Learn more about global shoppers

What are shoppers most commonly buying from international markets?

Where do shoppers drive the highest demand for these products across global and European markets?



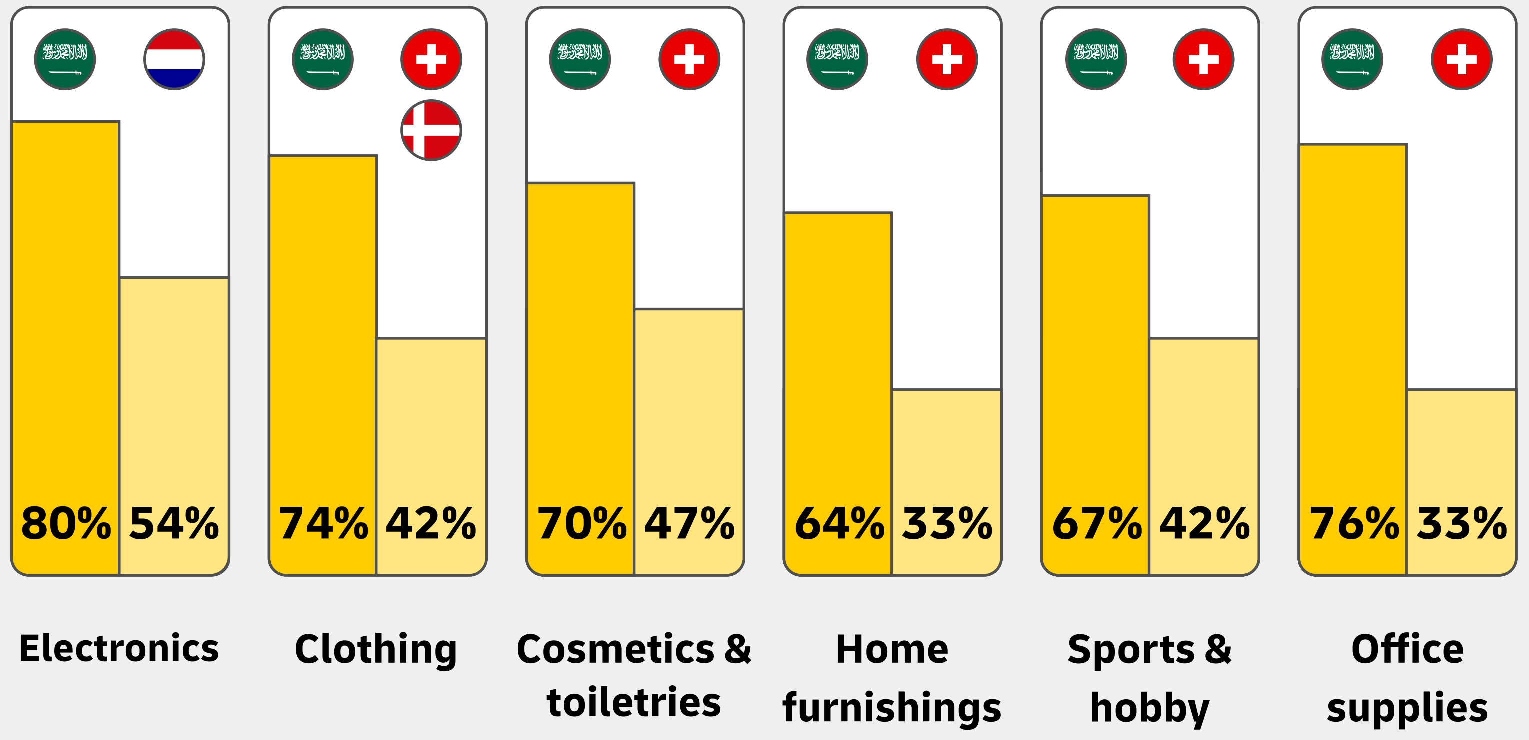
Cross-border sellers

These sellers are the most likely to trade internationally – they partner with multiple logistics providers to support cross-border shipping and they prioritize localizing their stores for the markets they serve.

Learn more about cross-border sellers

What are businesses most commonly selling to international markets?

Where do sellers see the highest demand for these products across global and European markets?



3. Buy now and cart abandonment

When everything is in stock, the checkout still breaks the deal.

With only a quarter of shoppers saying they never abandon their carts, most drop off at the final step – often because delivery is too expensive, too slow, or unclear. Even when they're ready to buy, that last bit of friction can stop the sale.

And it's not just delivery, 58% of deal seeking shoppers will leave if a discount code doesn't work, while others drop off if the experience feels slow or untrustworthy.

Businesses that get the final step right – particularly delivery and returns – are more likely to turn interest into purchase.

> "The gap between the digital world and the physical is still jarring – especially when there's a cost to turn your digital dream into delivered reality. As the digital and physical worlds merge even more, and at some point we'll swap smartphones for smart glasses, seamless delivery will become a key differentiator."
>
> ***Tom Cheesewright***

Once shoppers are ready to buy, where do they most often abandon their purchase?

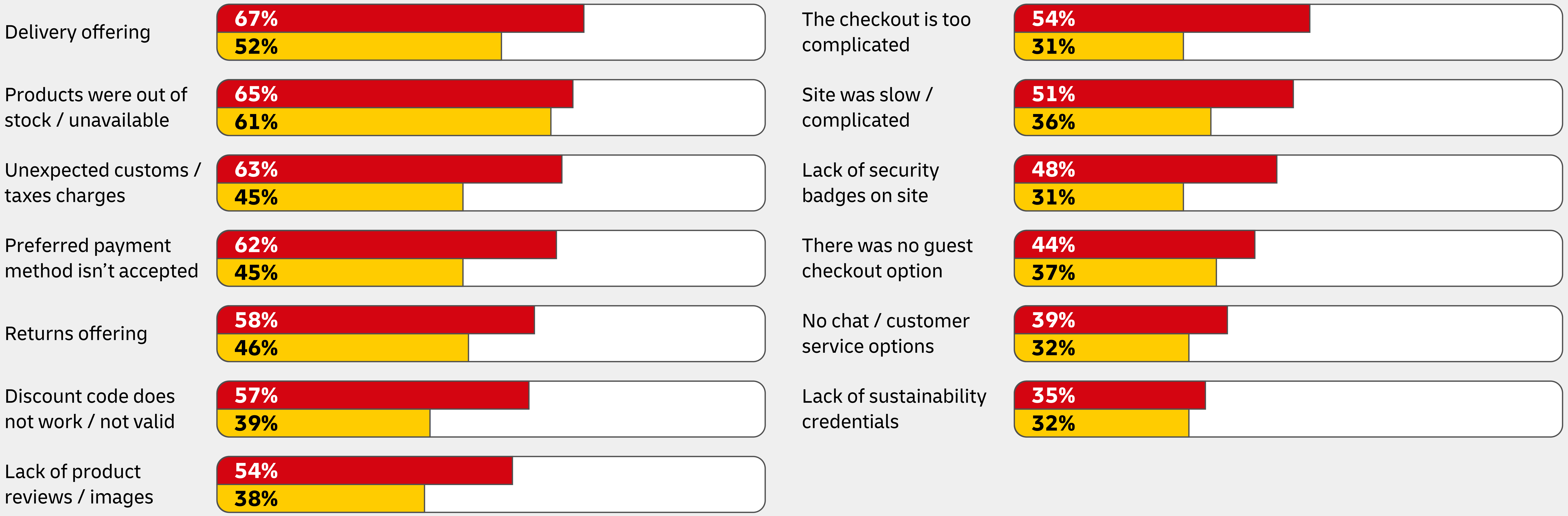
At which stage do businesses see shoppers abandon the most?

Share of "Yes" responses shown.

Why shoppers abandon vs. what businesses see

What has caused shoppers to abandon an online purchase?

What reasons can businesses see for abandoned carts?

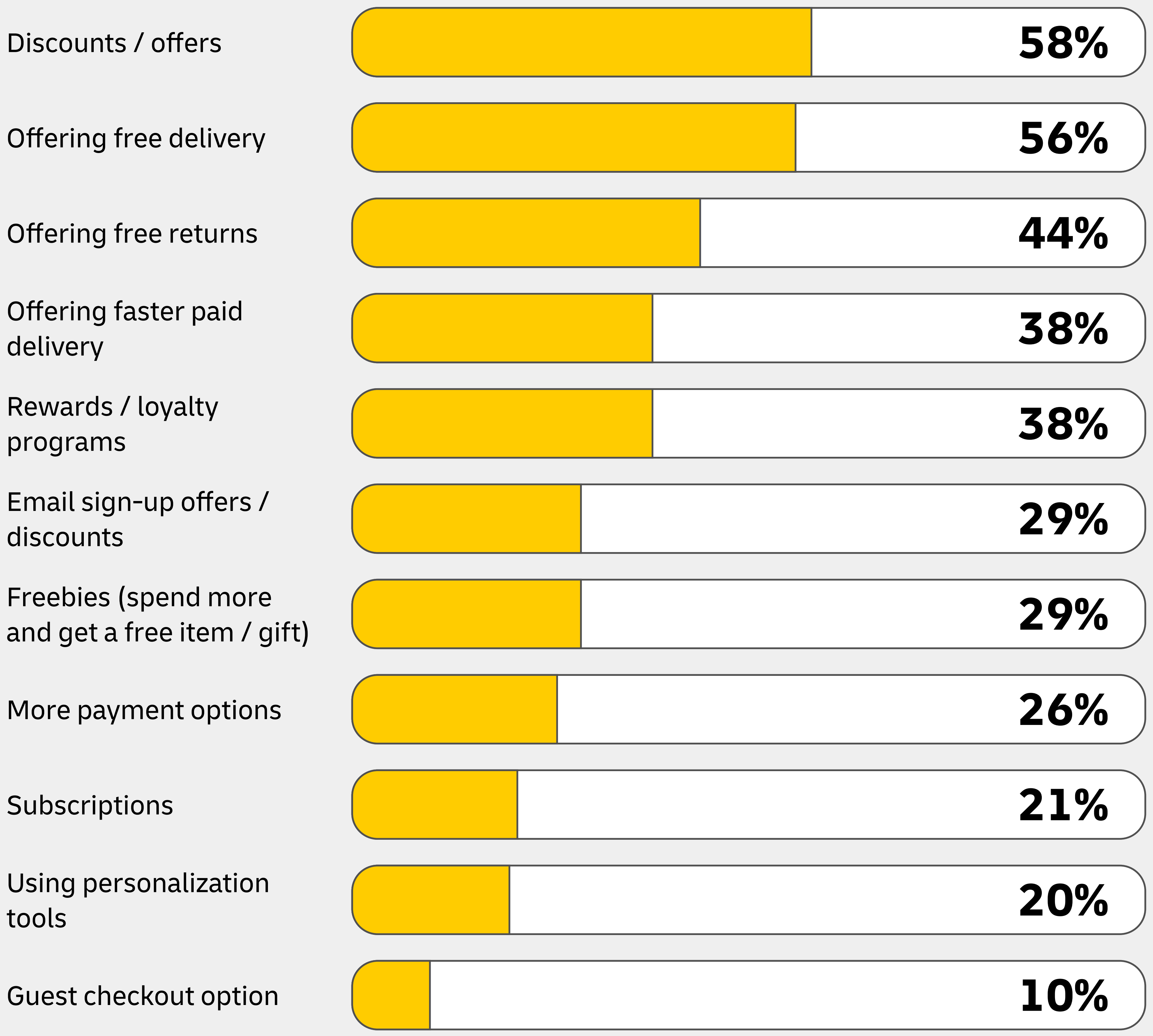


Deals don't close sales – delivery does.

Discounts might get shoppers through the door, but delivery is what gets them over the finish line. From free shipping and faster delivery to flexible returns and checkout options, convenience-led experiences are becoming the biggest drivers of conversion.

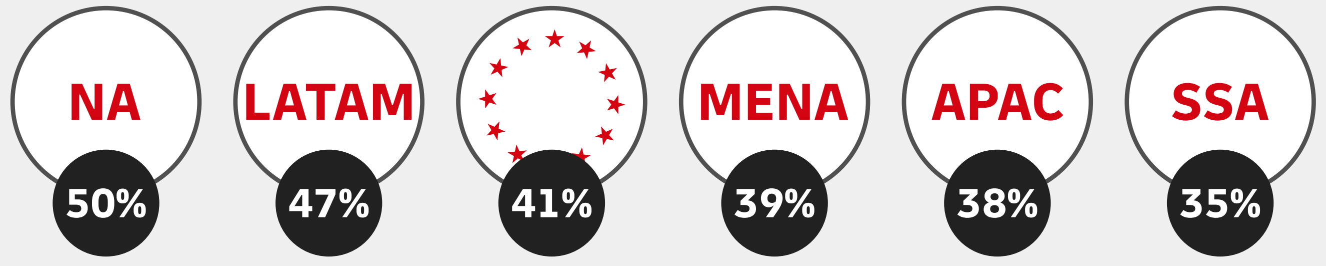
7 in 10 shoppers will abandon their cart if they are not offered the delivery or returns options they want at the checkout.

What tactics aid cart conversion across businesses' e-commerce platforms?

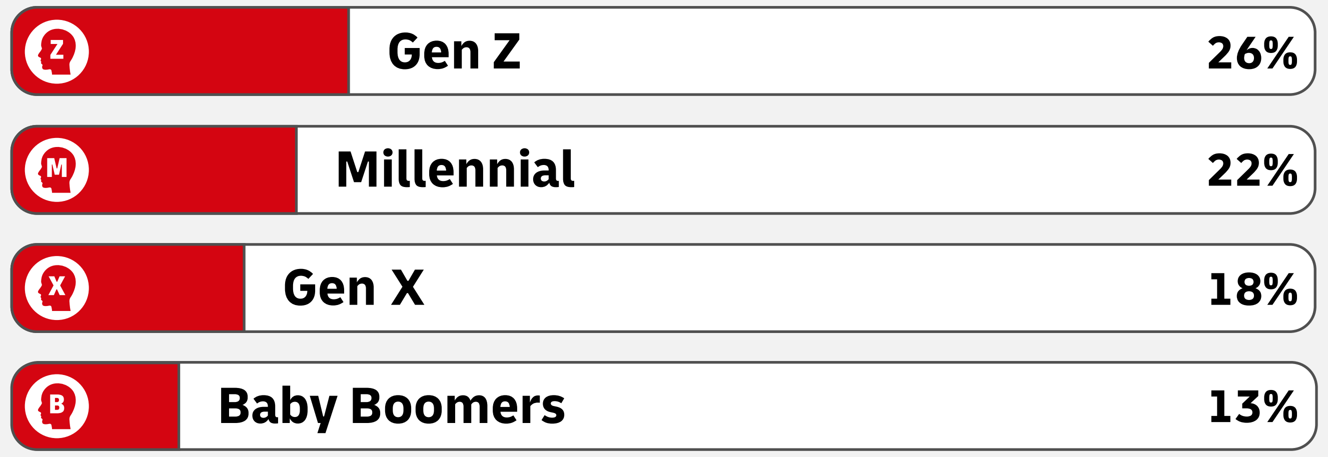


What would have most encouraged shoppers to complete their purchase?

Free shipping encourages purchases



Who wants faster delivery?



> "We can already see a pathway to even lower friction digital commerce. But that will highlight the biggest barriers to conversion – delivery and returns – all the more. Future-ready retailers are acting now, not waiting."
> ***Tom Cheesewright***

4. Payments

Shoppers use 4 payment methods on average, while businesses offer 7.

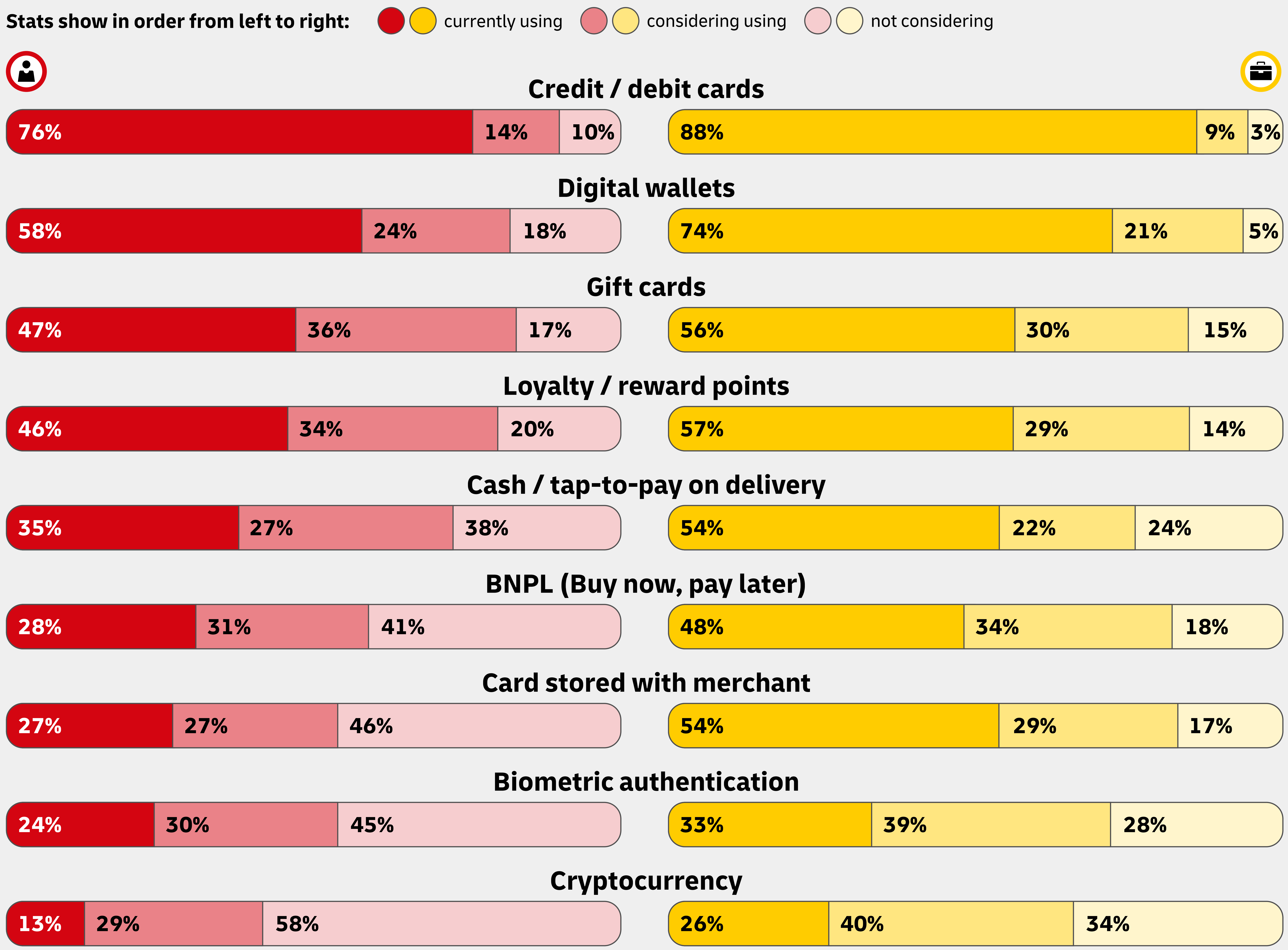
Shoppers want choice and flexibility, but maybe not as much choice as businesses currently offer? While regions like MENA and SSA are adapting to emerging payment options quickly, many European markets remain more cautious, highlighting a global mismatch between merchant investment and actual consumer usage.

The real opportunity lies in prioritizing the overlap – Buy now, pay later (BNPL), biometrics, subscriptions, and stored cards are all where the shopper demand and business focus align.

Ultimately, successful payment strategies will be less about offering everything, and more about delivering the right options at the right moment – clearly, securely and at the moment of greatest trust.

> “The question of different attitudes to alt payments is really interesting. One could assume that European rejection of alt payments and crypto is just conservatism. But the truth is probably the reverse: Europe has been ahead on payments with stable, low risk, low friction and low cost options for a long time. Alt payments by comparison are often more work rather than less.”
>
> ***Tom Cheesewright***

The top 10 payment preferences of shoppers and businesses globally – today and in the future.



From cards to crypto.

Shoppers and businesses agree that the payment stage is make-or-break – but they are not fully aligned on the importance of its role in cart abandonment. **62%** of shoppers will abandon a purchase if their preferred payment method isn't available, yet only **45%** of businesses see this as a key driver.

Credit and debit cards still dominate globally, led by Visa and Mastercard, but local payment providers often win in specific markets – making it essential for businesses to understand regional preferences when expanding internationally.

With digital wallets now used by nearly **60%** of shoppers and cryptocurrency adoption forecast to reach almost **30%** by 2030, success will depend less on offering more options and more on offering the right ones – in the right markets.

Why payment choice matters for shoppers and businesses

62% of shoppers abandon carts when their preferred payment methods are not accepted.

The payment stage of the checkout is the **No.1** drop-off point for shoppers.

17% of shopper say more payment options would have encouraged them to complete a purchase.

45% of businesses say shoppers abandon carts if their preferred payment method isn't offered.

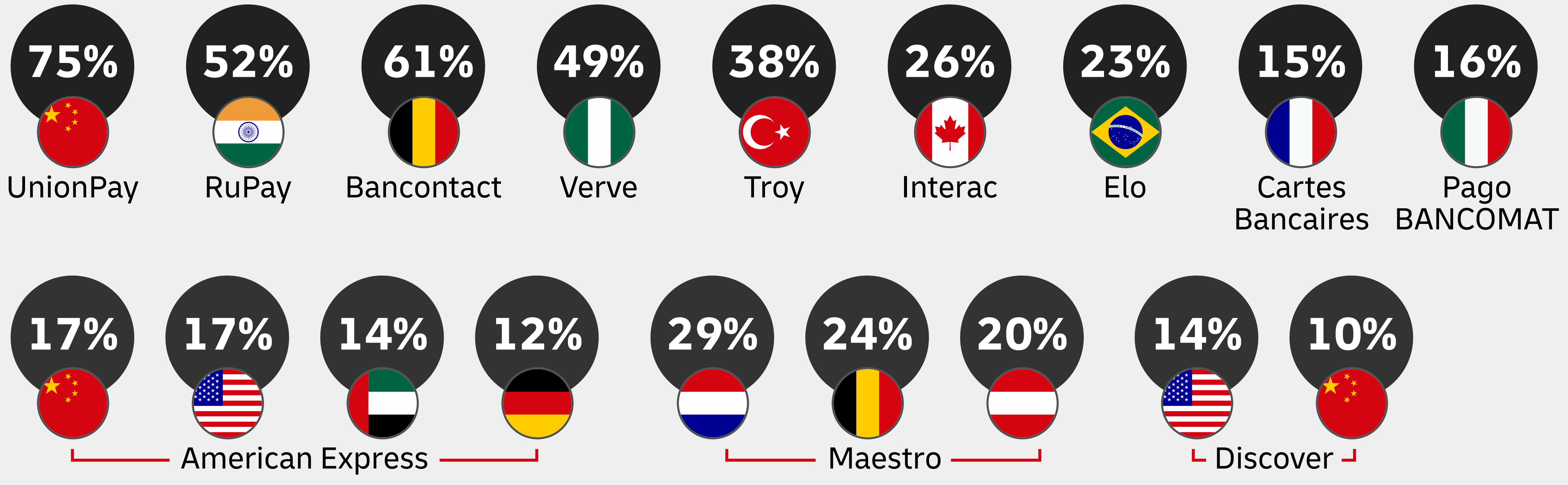
The payment stage of the checkout is the **No.1** drop-off point for businesses too.

26% of businesses say more payment options aid conversion across their e-commerce platforms.

How the world pays

64% Visa

57% Mastercard



Payment sweet spots

For both shoppers and businesses:

- Credit/debit cards
- Digital wallets
- Loyalty/reward points
- Cash/tap-to-pay on delivery
- Gift cards

Coming into focus

Shopper adoption is still growing, while businesses are already well prepared to support:

- BNPL
- Biometric authentication
- Subscription billing
- Stored cards

Not mainstream (yet!)

Shoppers are resistant, and businesses remain hesitant about:

- Cryptocurrency

Cash or pay-on-delivery dominates in MENA at **73%** and Asia Pacific at **69%**, highest in Morocco at **74%**, Thailand at **70%** and the UAE at **64%**.

5. Product and logistics subscriptions

Premium delivery & returns are going mainstream, with some markets already treating them as standard.

Large, medium and B2B e-commerce businesses are leading the shift toward premium logistics. Many already offer paid delivery and returns subscriptions, and they show the strongest intent to expand them further. Their scale and operating models make subscription-based services easier to support and better aligned to long-term customer value.

At the other end of the market, adoption remains lowest among sole traders, where tighter margins, smaller scale and operational complexity continue to create barriers.

Demand is strongest among younger shoppers and in markets where subscriptions are already part of everyday e-commerce. Countries such as the UAE, Saudi Arabia, Türkiye and India show high adoption from both shoppers and businesses, suggesting premium logistics is becoming a standard part of the shopping experience rather than a niche extra.

How many delivery and returns subscriptions do shoppers currently have with online retailers?

64% One

23% Two

13% Three or more

Do businesses currently offer logistics subscriptions where

Global total

53% Yes

24% Plan to introduce

32% No

	Yes	Plan to introduce
B2B Businesses	58%	30%
B2C Businesses	38%	39%
Hybrid Businesses	56%	30%
Sole traders	29%	32%
Micro enterprises	32%	38%
Small enterprises	47%	38%
Medium enterprises	62%	30%
Large enterprises	61%	29%

Where in the world is this now the new normal for businesses?

Saudi Arabia: **95%**

Malaysia: **92%**

Nigeria: **83%**

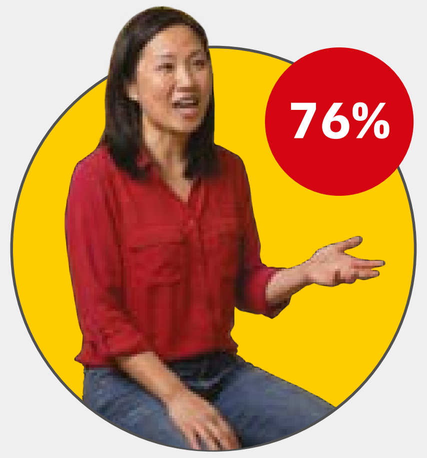
UAE, Austria, India: **73%**

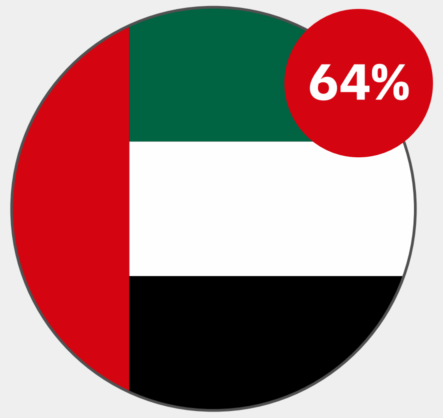
Australia : **70%**

How many shoppers currently pay a premium for delivery & returns subscriptions with

Global	40%
Gen Z	48%
Millennials	50%
Gen X	37%
Baby Boomers	22%

Logistics subscriptions rise to **76%** for hands-free shoppers and **64%** for UAE shoppers.





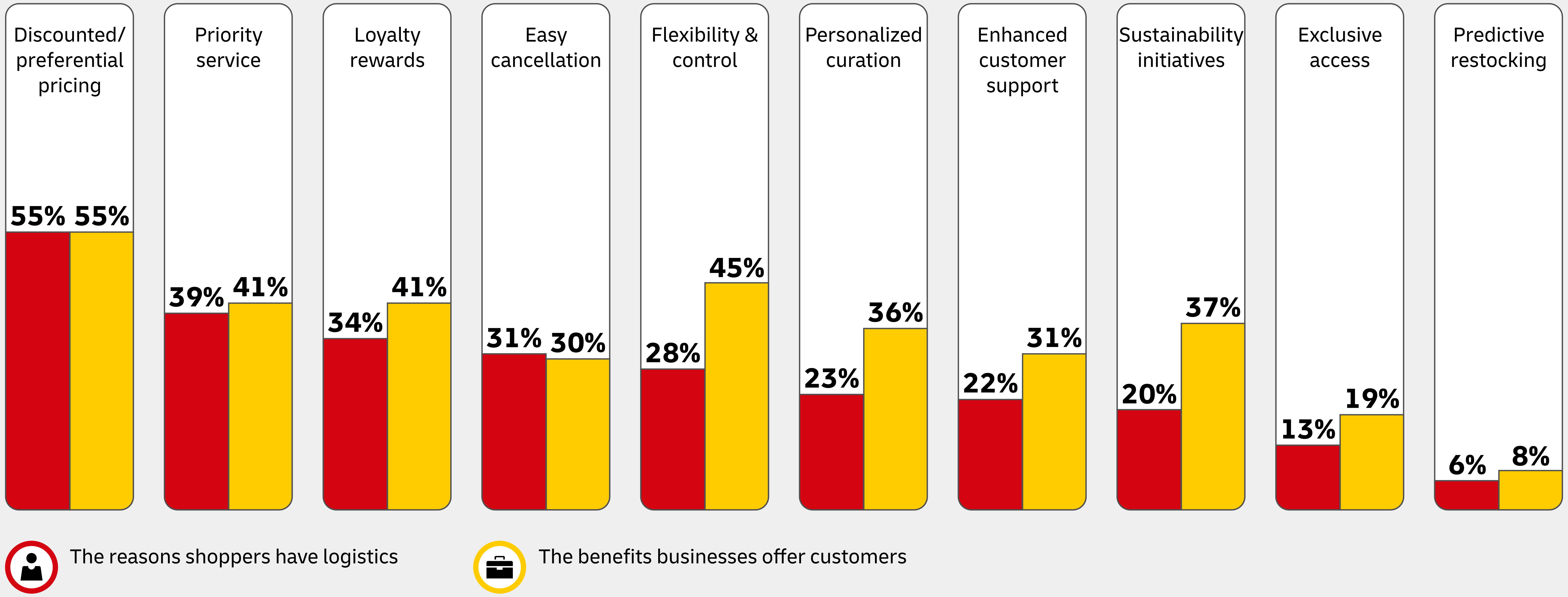
See full data in the appendix

Logistics subscriptions grow on value and convenience. Cost and complexity drive shoppers away.

There is a clear financial and speed-led value proposition for both shoppers and businesses in logistics subscriptions. However, if businesses fail to strike the right balance between cost and speed of delivery, shoppers are quick to cancel. Notably, the most active markets for logistics subscriptions are also the quickest to cancel, suggesting higher expectations and lower tolerance for friction.

Overall, the gap between promised perks and everyday usability indicates that retention depends less on innovation and more on consistently delivering core benefits – making savings, fast delivery, and easy returns simple, reliable, and clearly worthwhile.

What benefits come with having a premium delivery and returns subscription?



Have shoppers canceled a delivery/returns subscription with an online retailer in the

37% Yes **63%** No

Rising to 1 in 2 shoppers canceling subscriptions in UAE & India.

Why have shoppers canceled a delivery/returns subscription?

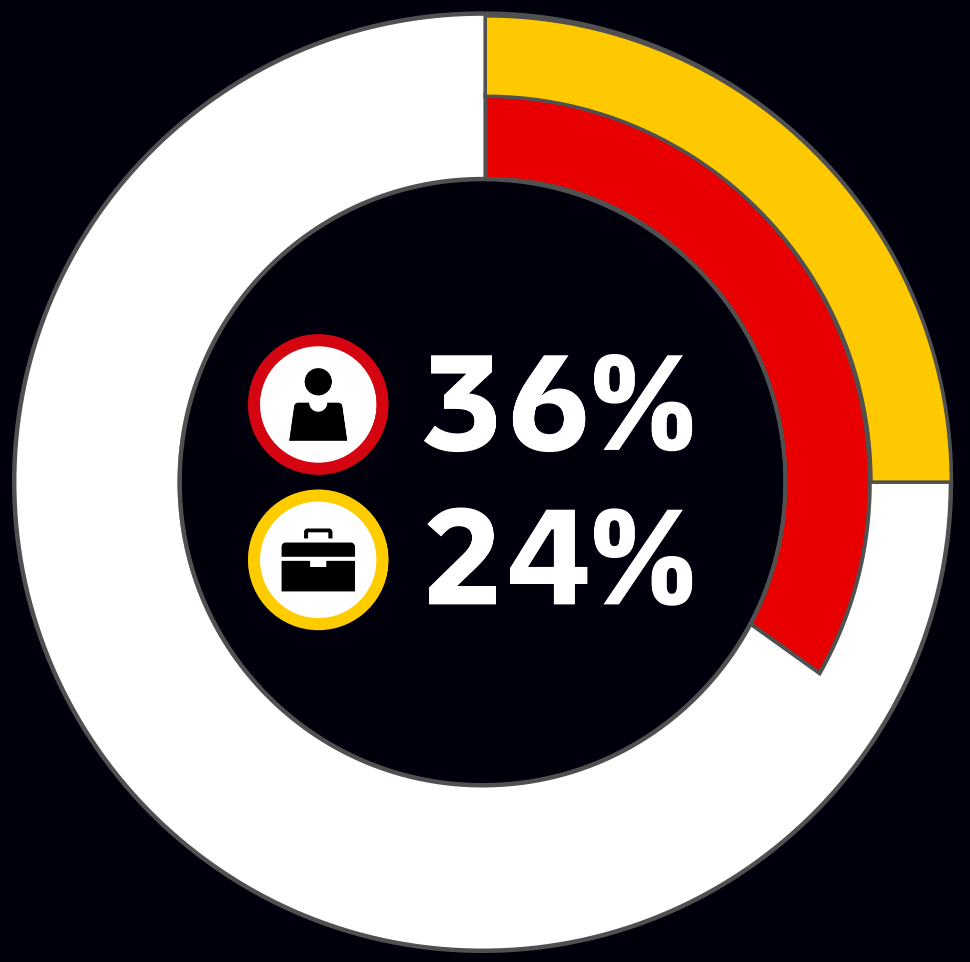
Costs too much	51%
Changes in delivery speed	35%
Returns process is too long	32%
Not utilizing the perks/benefits	27%
Switched to a different provider	21%
Want to reduce spending	15%

> "Delivery/returns subscriptions are a great mechanism to make your store more sticky, especially in a world of AI-driven decision-making. But they have to be priced appropriately to offset the cost of the casual browser who wants to try everything before they buy. Aspirational brands might want to try higher membership fees and benefits – but generic retailers might struggle."
>
> ***Tom Cheesewright***

Product subscriptions are growing but so is churn.

There is a slight misalignment between what shoppers subscribe to and what businesses offer, leaving some markets underserved. While shoppers expect to increase their subscriptions, frequent cancellations show that sustained growth depends on consistently delivering clear, everyday value.

Shoppers with product subscriptions vs. businesses offering them



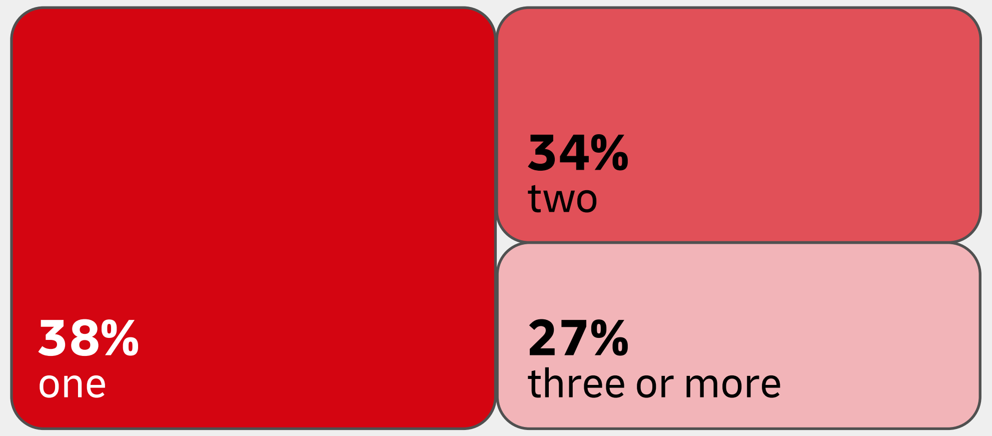
What shoppers are

Clothing	Footwear	Cosmetics & toiletries	Electronics	Food & beverages
63%	53%	50%	49%	48%

What businesses are

Electronics	Clothing	Cosmetics & toiletries	Sport & hobby	Home furnishings
45%	39%	38%	36%	35%

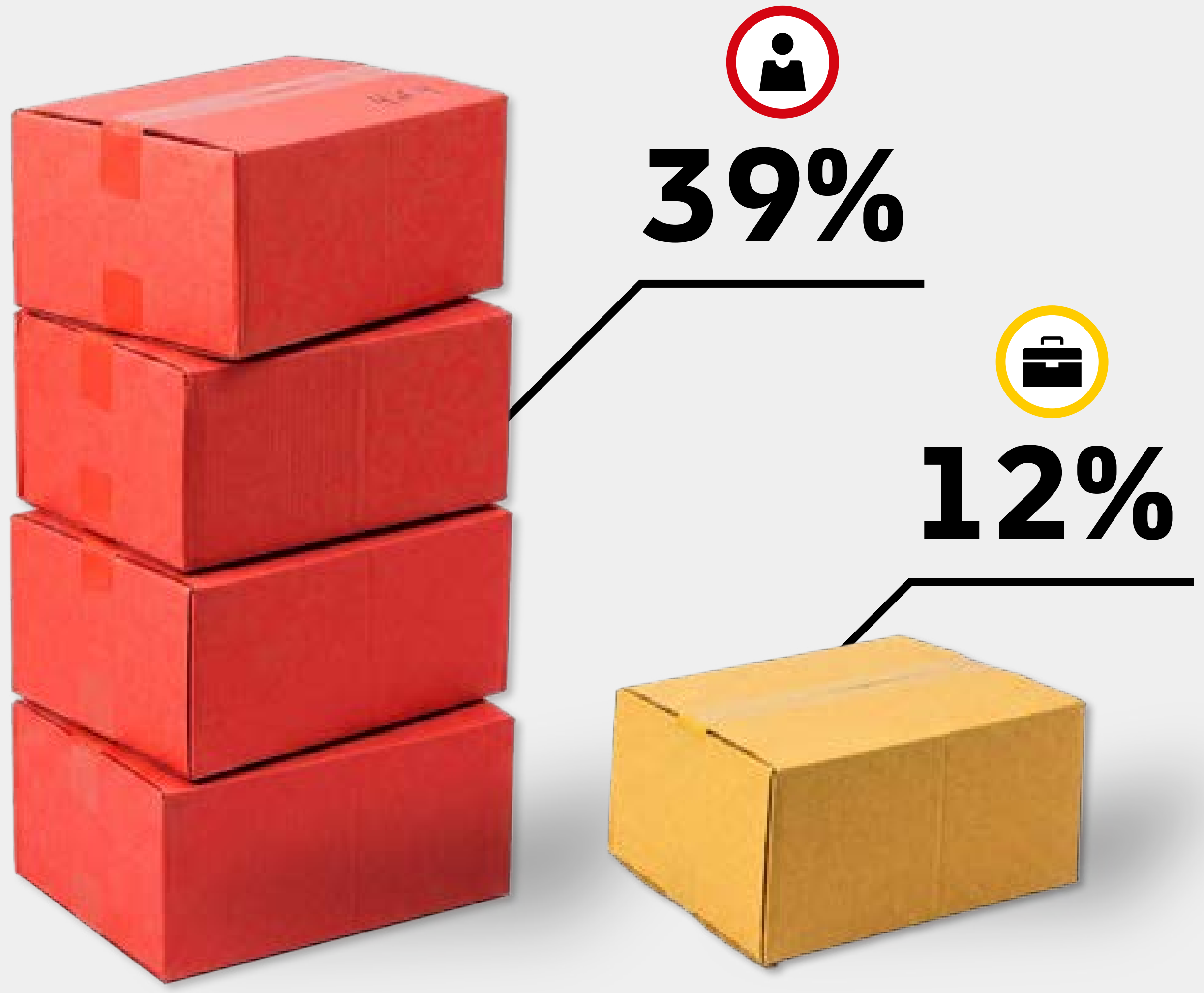
How many retailers do shoppers currently subscribe to for product offerings?



Over **1 in 2** shoppers expect their product subscriptions to increase over the next 5 years.

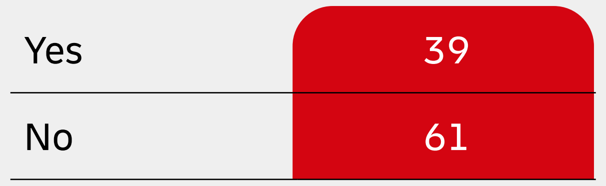
A market ready for more

The biggest opportunity is in Latin America, where **39%** of shoppers use subscriptions, but only **12%** of businesses offer them.



Have shoppers cancelled a product subscription with an online retailer in the past 3 months?

Younger generations are more likely to cancel whereas Baby Boomers and Gen X tend to stay loyal.



6. Sustainability and the circular economy

Sustainability is part of the path to purchase.

Businesses and shoppers are increasingly aligning on sustainability as both a driver of purchase and a potential dealbreaker. Both sides are also turning to AI to support smarter, more sustainable choices. With green logistics expected to become standard within the next five years, solutions like out-of-home delivery and stronger sustainability propositions will become even more important.

35% of shoppers have abandoned an online purchase due to missing sustainability credentials.	vs.	**32%** of businesses report cart abandonment linked to lack of sustainability credentials.
30% of shoppers expect green logistics to become standard in the next 5 years.	vs.	**42%** of businesses expect green logistics to become standard within the next 5 years.
23% of shoppers prefer out-of-home pick up points for sustainability reasons.	vs.	**35%** of businesses consider sustainability important when choosing logistics partners.
22% of shoppers already use AI for sustainability insights, and 47% want this in the future.	vs.	**46%** of businesses use AI for sustainability insights, and 27% are considering it.
20% of shoppers have a logistics subscription because of sustainability initiatives.	vs.	**37%** of businesses offer logistics subscriptions because of sustainability initiatives.
9% of shoppers are more likely to buy internationally when carbon offset information is provided.	vs.	**29%** of businesses plan to invest in more sustainable or eco-friendly options in the next 12 months.

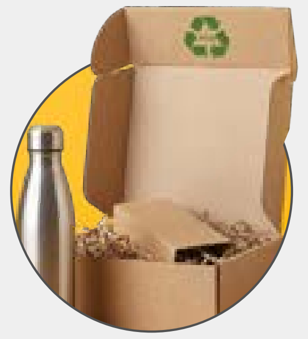
Eco shoppers

Have growing expectations for greener products and delivery options, and a small number look to retailers in other countries for more ethically sourced products.

Get to know eco shoppers

Eco-friendly sellers

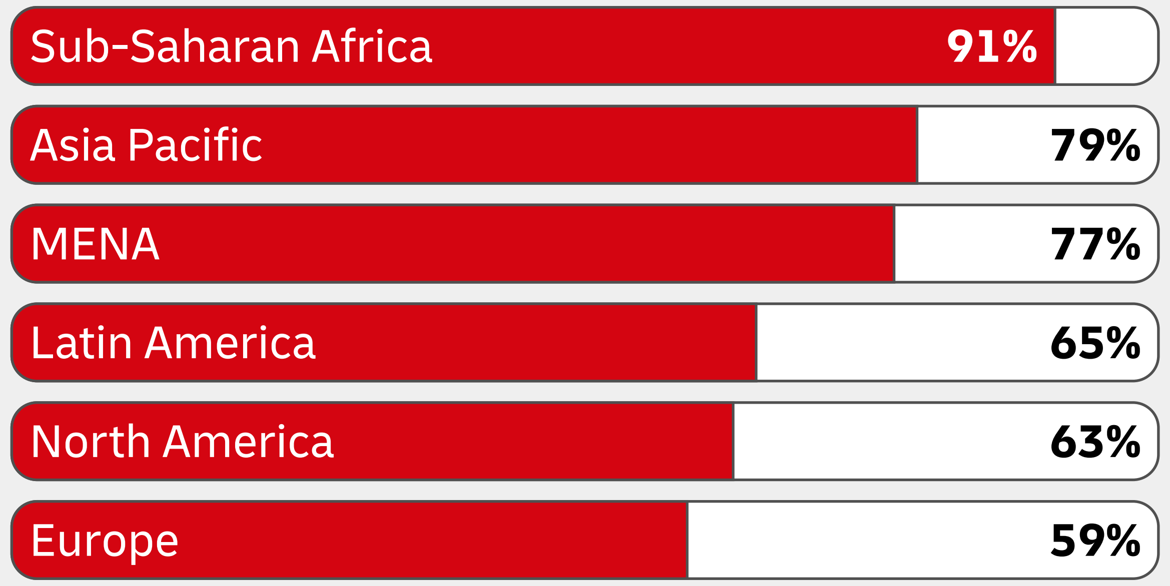
Are actively prioritizing sustainability, regularly evaluating their delivery partners and planning to expand their environmentally conscious offerings.



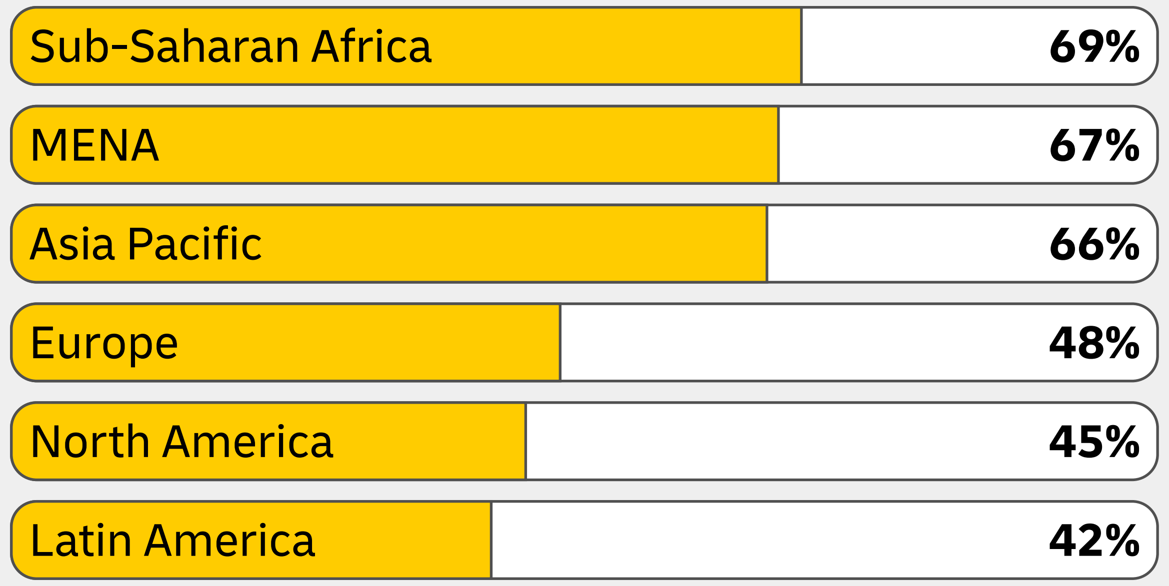
Meet the eco-friendly sellers

Over 7 in 10 online shoppers and e-commerce businesses see DHL as very and quite sustainable.

What regions have the most sustainable shoppers?



What regions have the most sustainable sellers?



Closing the convenience gap will unlock circular growth – led by emerging markets and millennials.

Trade-in and buy-back schemes remain underutilized by both shoppers and businesses – but the barrier is convenience, not intent.

When returns are free and drop-off options are easy, adoption increases. At the same time, a clear global shift is emerging. Markets including Nigeria, India, Malaysia, the UAE and Saudi Arabia are already leading circular and sustainable initiatives, driven particularly by millennials and medium-sized businesses at the forefront of more sustainable e-commerce practices.

> "Evidence has shown that consumers need two things to consistently make sustainable choices: ease of use, and parity of cost. Companies that want to cut their future footprint need to make it a no-brainer for customers to pick the right path."
>
> ***Tom Cheesewright***

Which sustainable e-commerce practices have shoppers taken part in or most influence their purchasing decisions?

	Yes	Looking to do in the future	No
Received repair/maintenance information	**50%**	**17%**	**33%**
Bought spare parts for repair	**48%**	**16%**	**36%**
Bought recycled/ethically sourced items	**46%**	**18%**	**36%**
Chose eco-friendly delivery/returns	**46%**	**20%**	**34%**
Bought pre-owned/refurbished items	**45%**	**15%**	**40%**
Followed recycling guidance	**43%**	**18%**	**38%**
Used trade-in/buy-back schemes	**37%**	**19%**	**44%**

Secondhand shoppers

Are highly engaged, using social platforms as a key buying channel and marketplaces to both buy and sell, while expecting a reliable, high-quality delivery experience.

Get to know secondhand shoppers

What would shoppers do for more sustainable deliveries and returns?

31% Only buy from retailers with sustainable delivery/returns

20% Accept longer delivery/return times

20% Use collection/drop-off points

19% None of these

10% Pay more for delivery/returns

What would encourage shoppers to use recycling or buy-back schemes?

58% Free/easy returns

43% Convenient drop-off or pick-up points

41% Clear instructions on how the program works

39% Rewards for participating

36% Transparency about how the items will be recycled or reused

Are e-commerce businesses currently doing any of the following?

	Yes	Looking to do in the future	No
Offering eco-friendly delivery / returns	**53%**	**21%**	**26%**
Providing clear recycling guidance	**53%**	**19%**	**28%**
Selling items made of recycled materials	**50%**	**21%**	**29%**
Providing repair / maintenance information	**50%**	**18%**	**32%**
Selling spare parts for repair	**49%**	**18%**	**33%**
Offering trade-in or buy-back program	**46%**	**19%**	**35%**
Selling pre-owned or refurbished items	**44%**	**18%**	**37%**

Pre-owned/ refurbished sellers

See circular commerce as a growth opportunity, using marketplaces and social platforms to reach value-conscious shoppers.

Meet the pre-owned/refurbished sellers

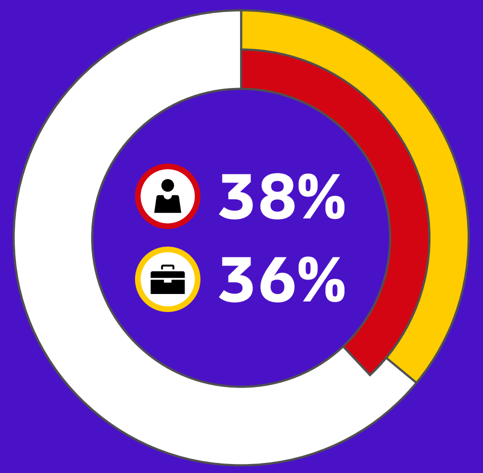
7. AI in e-commerce

Personalization, customer service and price comparisons: top AI wants for both shoppers and businesses.

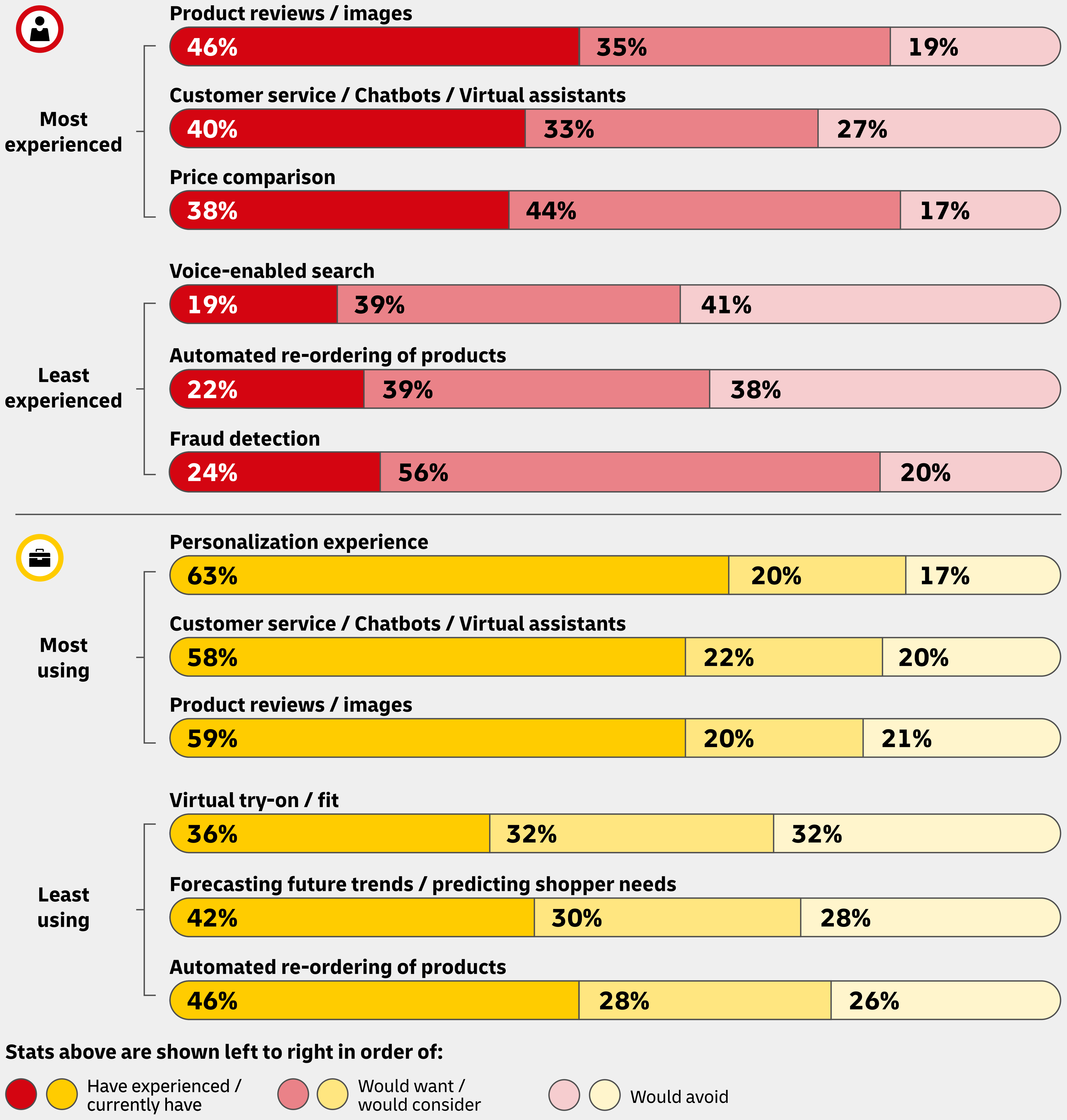
Despite **23%** of shoppers describing themselves as hands-free shoppers, **41%** do not want voice-enabled search when shopping online. Automated reordering and AI predicting future needs also rank among the least desired features, suggesting shoppers still want control over the buying journey.

Businesses show similar hesitation. While **28%** would not want voice search themselves, **26%** already offer it. Virtual try-on and fit technology is the least desired feature among businesses, likely because not every product category naturally suits the experience.

38% of shoppers and **36%** of businesses are using AI-powered chat or virtual assistants to buy and sell.



The most and least adopted AI features among shoppers and businesses – and what comes next.



28% of shoppers have experienced some form of AI when shopping online.

63% of businesses use some form of AI across their e-commerce platforms. This jumps to 91% in UAE and 88% in Malaysia.

See full data in appendix

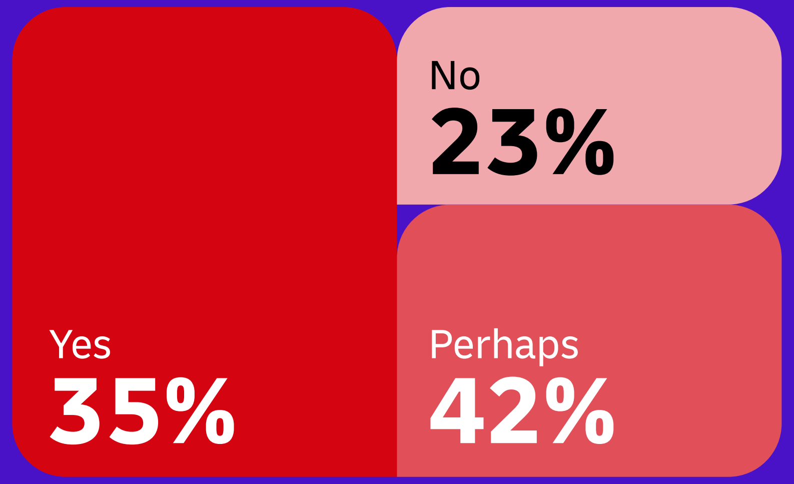
> "The growth of OpenClaw has proven the consumer appetite for true AI assistants that can take on some of the cognitive overhead of modern life. As soon as someone gets the proposition right, expect consumer adoption to rapidly overtake retailer rollout."
>
> ***Tom Cheesewright***

Misinterpretation and trust emerging as the top AI concerns for shoppers and sellers.

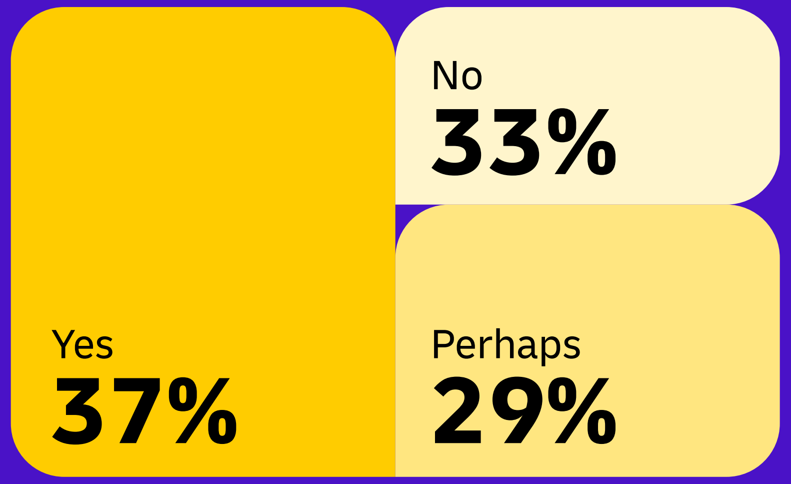
Shoppers and businesses show striking alignment in their AI concerns, with misinterpretation, relevance, and privacy, trust and security ranking highest for both. While businesses worry more about chatbot performance, shoppers are notably more sensitive to pushy upselling, reinforcing the need for AI that is transparent, accurate and customer-first.

Overall, concern is highest among B2B retailers and sole traders, as well as European shoppers and Baby Boomers, highlighting continued caution among more established and risk-aware audiences.

Shoppers and businesses share similar levels of concern over AI



Do shoppers have any concerns about AI during their online shopping experience?

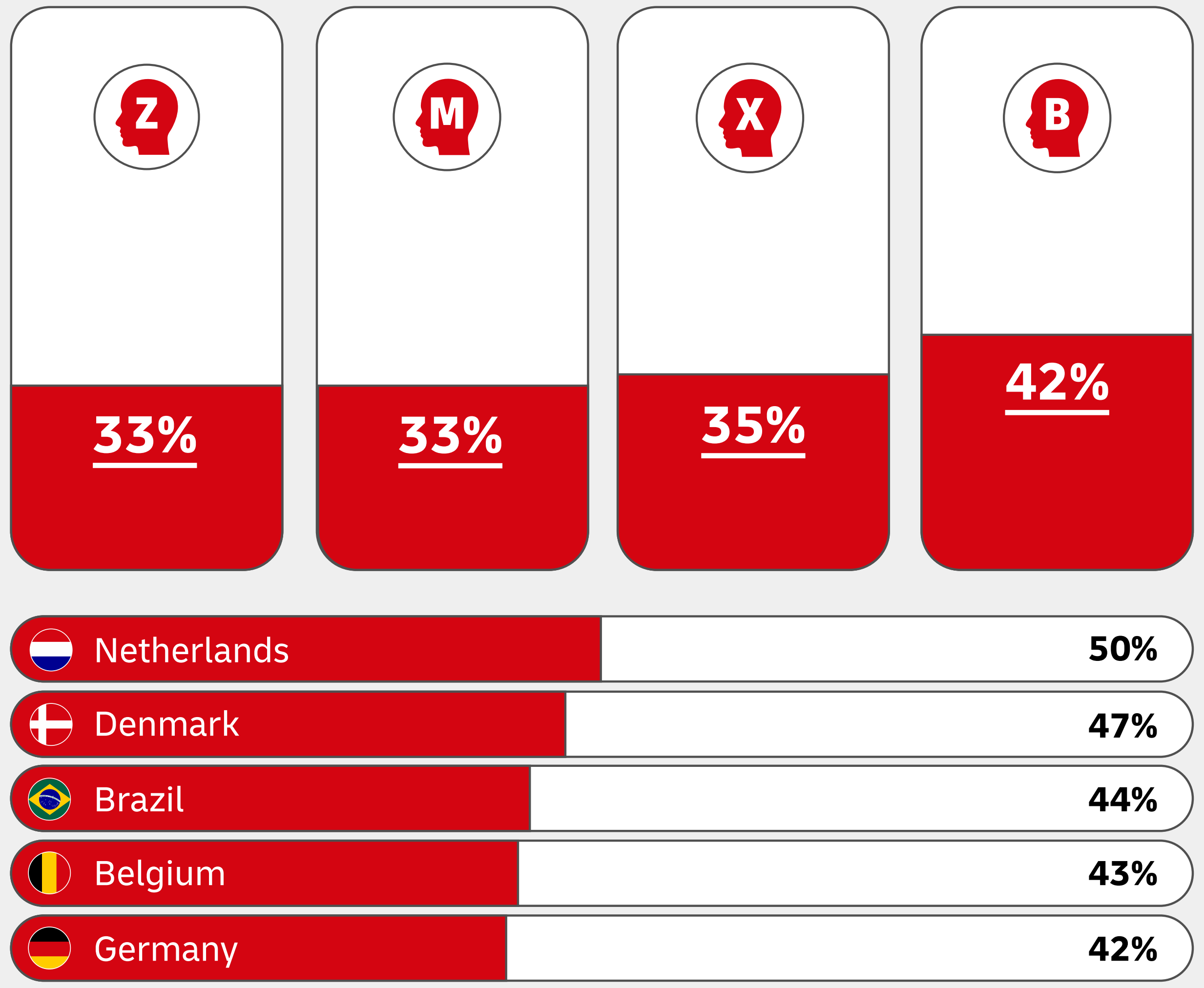


Do businesses have any concerns about using AI across their e-commerce platforms?

What concerns do shoppers and business have around AI?

	👤	💼
Privacy, trust and security	58%	60%
Misinterpreting queries or showing irrelevant result	46%	50%
Pushy upselling tactics	40%	28%
Overly intrusive personalisation	38%	39%
Bias or unfair pricing	32%	33%
Slow or inaccurate chatbots	32%	46%
Incorrect delivery and returns optimisation	----	21%

Which shoppers and countries are most concerned about AI?



Which business are most concerned about AI?

	Yes	Perhaps	No
B2B Businesses	46%	29%	25%
B2C Businesses	37%	35%	28%
Hybrid Businesses	35%	27%	38%
Sole traders	42%	31%	27%
Micro enterprises	34%	32%	33%
Small enterprises	35%	34%	31%
Medium enterprises	37%	28%	35%
Large enterprises	39%	27%	35%

AI is going mainstream for younger shoppers, emerging markets and larger businesses.

Nearly one in three shoppers globally already use AI-powered chat tools frequently when shopping, led by Gen Z, Millennials, and fast-growing markets such as India, the UAE, and China.

Looking ahead, confidence in AI-driven shopping decisions remains strongest among younger generations and emerging markets, while **7 in 10** businesses expect AI usage to increase over the next five years, with larger businesses and subscription-model sellers leading the charge.

How often are shoppers using AI-powered chat tools when shopping online?

	Every time I shop and often	Occassionally	Never
Global	31%	36%	33%
Gen Z	43%	36%	21%
Millennials	38%	38%	25%
Gen X	25%	39%	36%
Baby Boomers	13%	31%	56%

In the next 5 years, how likely will shoppers let AI make shopping decisions or puchases for them?

	Very / somewhat likely	Neither likely nor unlikely	Not at all / not very likely
Global	29%	38%	32%
Asia Pacific	45%	39%	16%
Europe	18%	40%	42%
Latin America	26%	36%	38%
Middle East & North Africa	47%	37%	16%
North America	25%	35%	40%
Sub-Saharan Africa	56%	30%	15%
Gen Z	33%	40%	27%
Millennials	36%	39%	24%
Gen X	28%	39%	32%
Babay Boomers	16%	34%	50%

AI-assisted shopper

Are digitally empowered shoppers who rely on AI tools and virtual assistants to guide decisions, simplify browsing, and streamline the buying experience.

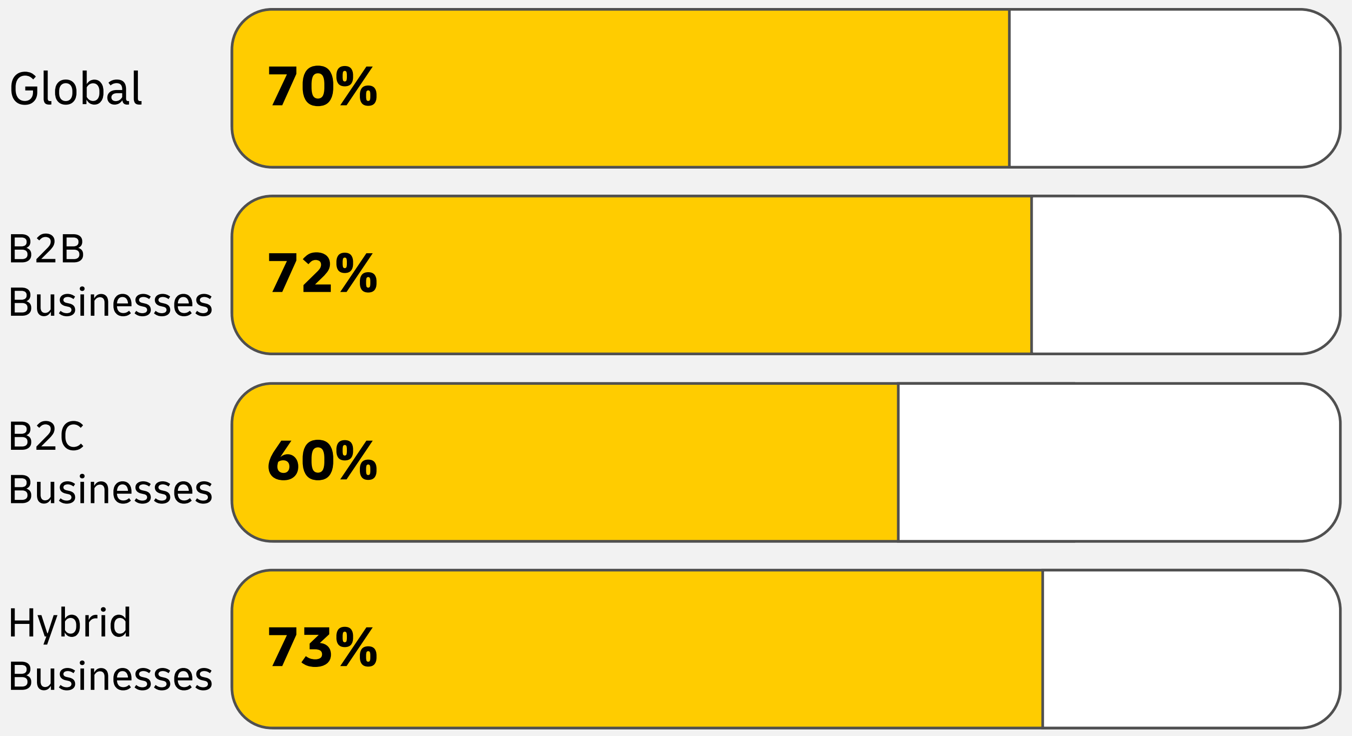
Get to know AI-assisted shoppers

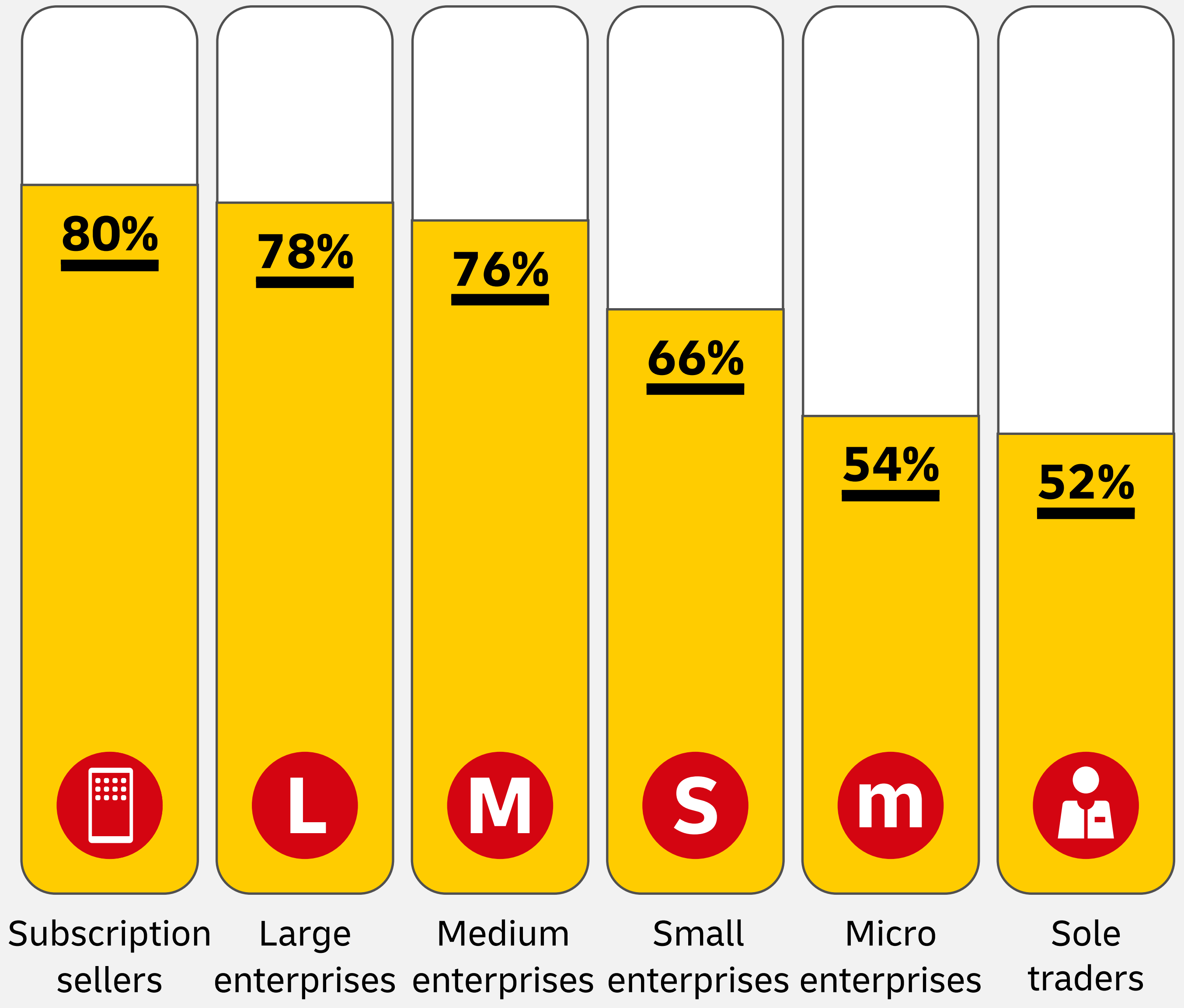
Top 10 shopping destinations using AI-powered chat tools when shopping online.

1.	India	59%
2.	UAE	51%
3.	China	47%
4.	Nigeria	46%
5.	Saudi Arabia	42%
6.	South Africa	41%
7.	Brazil	37%
8.	Spain	37%
9.	Morocco	35%
10.	Italy	33%

Is the usage of AI tools going to increase across businesses over the next 5 years?

Share of "Yes" responses shown.





8. Delivery, returns and out-of-home

"Free" logistics grabs attention, but trust and choice close the sale for shoppers and businesses.

Free delivery may get shoppers through the door, but it's trust and choice that ultimately secure the sale.

Shoppers increasingly expect delivery and returns to work on their terms: with the right options, the right provider, and no friction at checkout. Businesses recognize the pressure too, with delivery and returns now seen as key to winning conversion and keeping shoppers coming back.

7 in 10 shoppers won't shop with a brand if they don't trust the delivery and returns provider. The same amount will abandon their cart if they are not offered the delivery and returns options they want at the checkout.

9 in 10 businesses say the delivery and returns offering is important to securing online sales.

Does "Free" delivery & returns improve sales?

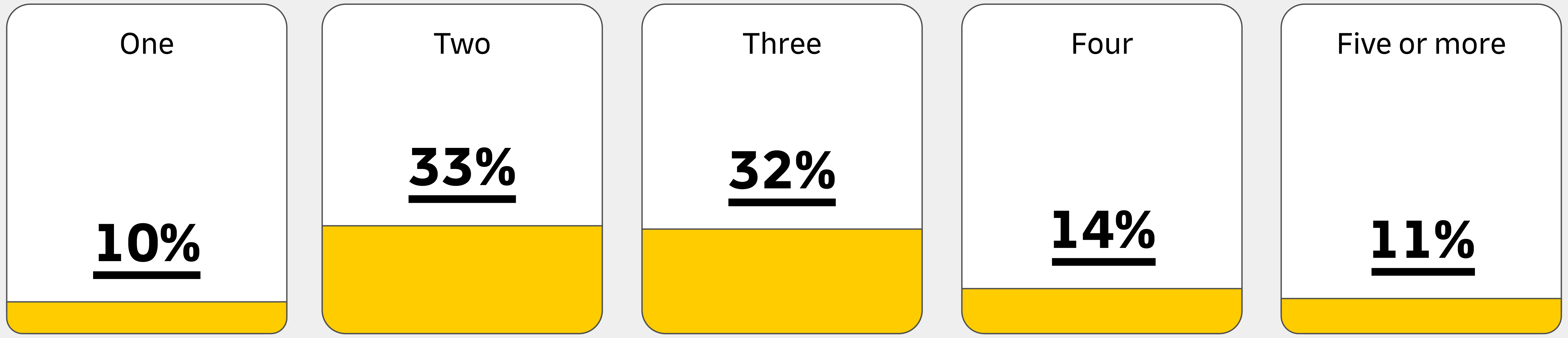
88%

of businesses state "yes"

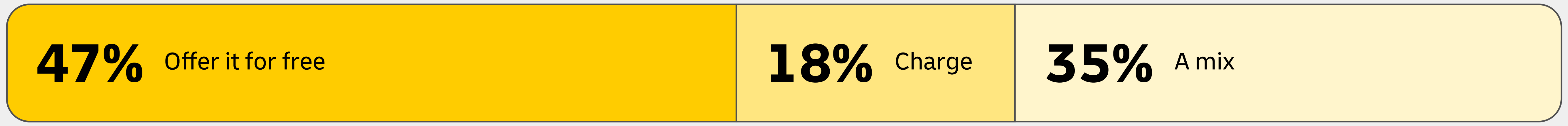
Free shipping

is the **No.1 motivator** that would encourage shoppers to complete their purchase.

How many logistics brands are businesses currently using for their delivery & returns?



How do businesses charge for delivery?



B2B **APAC** B2B and APAC businesses buck the global average with **57%** stating they build the logistics costs into their product offering to give the perception of "free".

Door, store or locked up? One choice doesn't fit every market.

Almost **3 in 10** shoppers now send deliveries directly to out-of-home (OOH) locations, while more than **6 in 10** returns already happen outside the home.

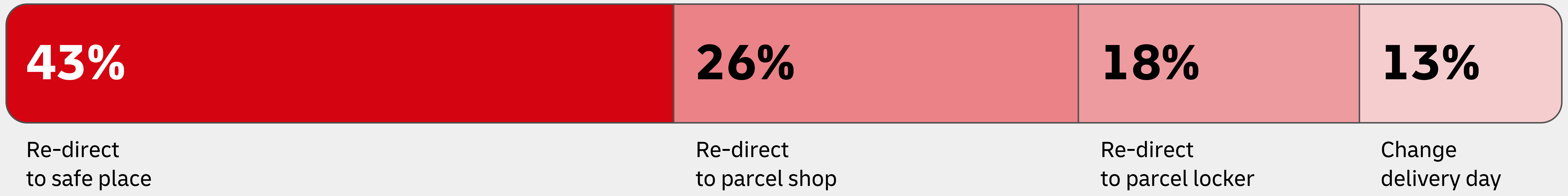
Demand is strongest in Europe, particularly in Poland, Austria and the Czech Republic, where shoppers are leading the shift toward more flexible delivery and returns options. Globally almost **4 in 10** shoppers want the ability to redirect deliveries to OOH locations, rising to nearly **1 in 2** for European shoppers.

97% of businesses state that out-of-home locations are essential to securing sales and getting repeat business.

	How do shoppers predominantly have their items delivered?			Where do shoppers predominantly return their unwanted goods?		
	Home delivery (or neighbor/ safe place)	Parcel locker	Parcel shop / Convenience store	Home collection	Parcel locker	Parcel shop / Convenience store
Global	72%	18%	11%	37%	28%	35%
Europe	60%	25%	15%	25%	33%	42%

Where do shoppers prefer to have their parcels re-directed if they are not home?

See the full data in the appendix



Convenience shopper

Convenience has become the defining lens of modern shopping. The vast majority of consumers identify as convenience shoppers, with 92% prioritizing fast, free delivery and hassle-free returns – making it the most powerful motivator, even ahead of platform preference. Ultimately, shoppers expect frictionless logistics that enable seamless, reliable online purchasing from start to finish.

Meet the convenience shoppers

40% of businesses drop shipments off to parcel lockers or shops – rising to **46%** in Europe.

See data in the appendix

> "Homes are shrinking as a higher proportion of the population lives alone for larger portions of their lives. Combined with the diversity of working and 'third space' environments, this creates continuing growth potential for the OOH delivery and returns market.
>
> Robots and drones offer the opportunity to bring deliveries to the person, not the address. But that carries higher potential for fraud and failed deliveries. Shops and lockers will likely remain important for high-value, heavy, or awkward goods."
>
> ***Tom Cheesewright***

One return. Two sides of the story.

Expectations on one side, operations on the other.

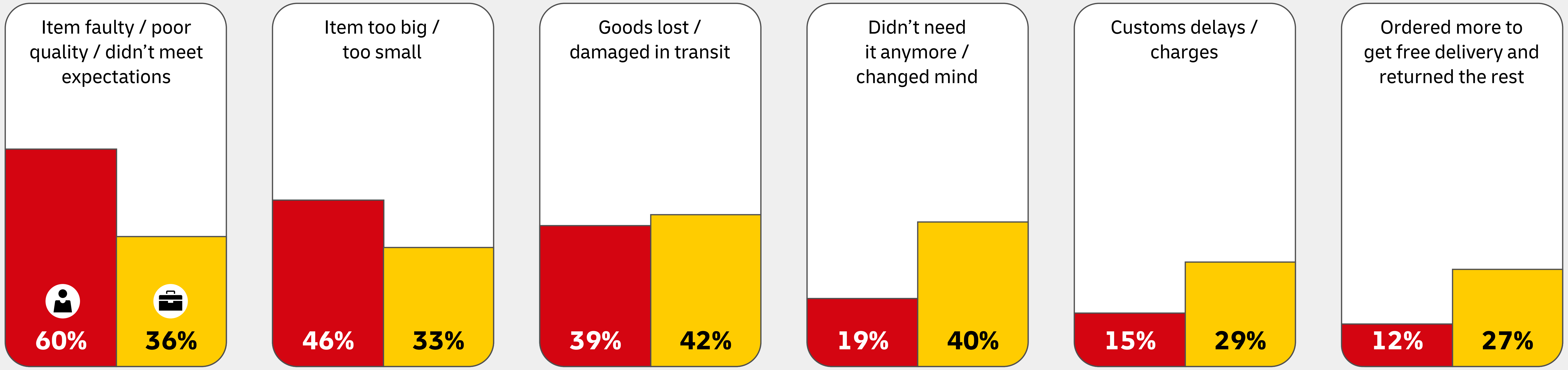
Shoppers most often explain returns through unmet expectations around the products they receive, while businesses tend to attribute returns to operational or process-related issues. The contrast reveals a disconnect between how returns are experienced by shoppers and how they are interpreted by businesses.

Neither side is necessarily wrong; they simply reflect different positions in the e-commerce journey. What both sides do agree on, however, is convenience: shoppers and businesses alike prefer return labels to be included with purchases from the start.

16% of shoppers return and 12% of businesses' orders are sent back

What are the main reasons for returns – from both the shopper and business sides?

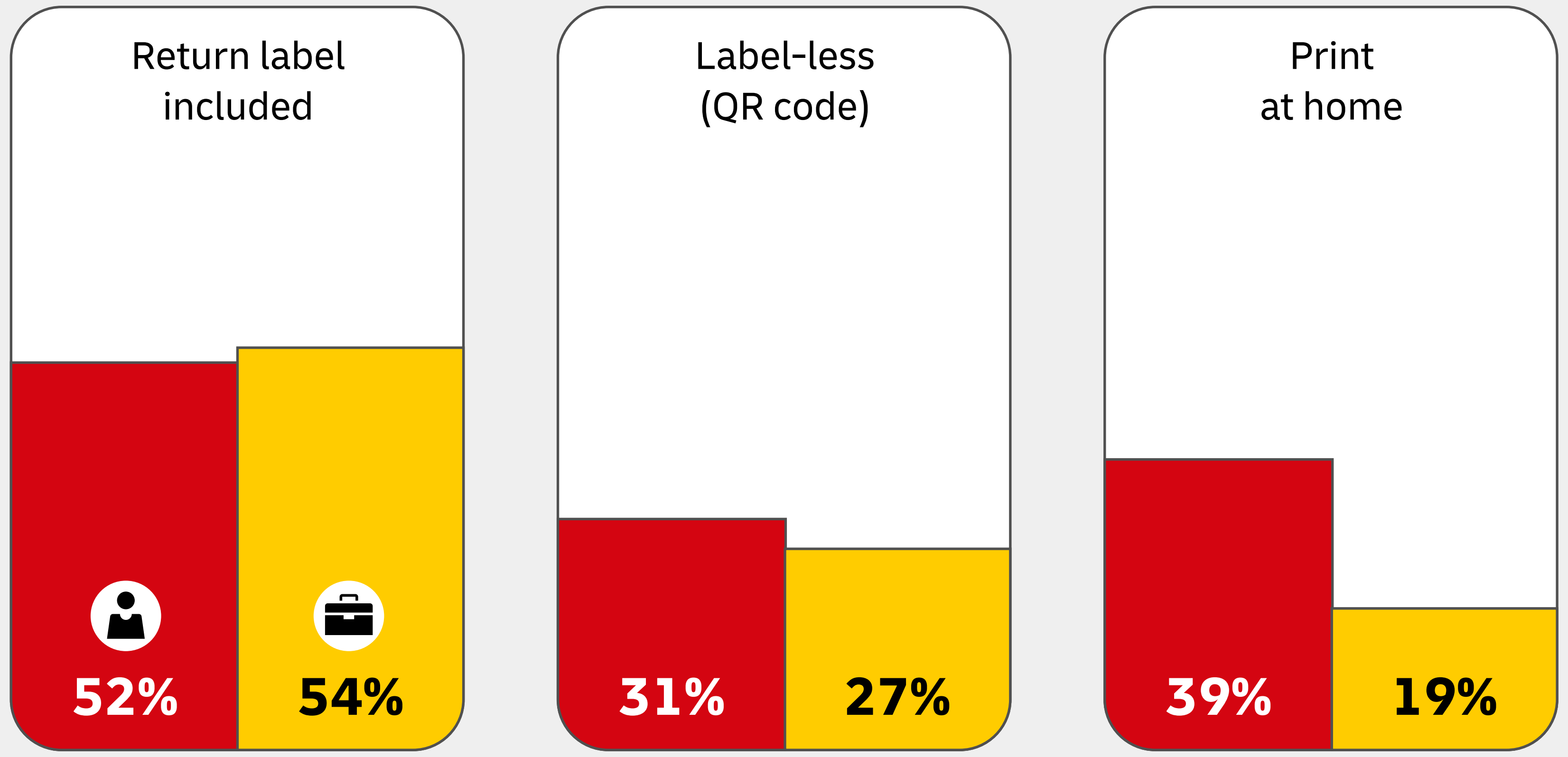
See the full data in the appendix



How often do online shoppers return goods back to retailers?

	Once a week or month	A few times a year	Once a year or never
Global	19%	25%	56%
Gen Z	27%	27%	46%
Millennials	25%	28%	47%
Gen X	16%	25%	59%
Baby Boomers	6%	20%	74%

How do businesses create return labels for their customers and what is the preference for shoppers?



See the full data in the appendix

The future of logistics.

Where businesses are ahead of shoppers needs, and where both sides align.

Businesses are placing bigger bets on green logistics and personalized delivery & returns than consumers are today, seeing them as longer-term investments in the future of delivery. But where shoppers and businesses strongly align is on the need for greater speed and convenience across the logistics experience.

At a market level, countries like China and Türkiye are leading demand from both sides, particularly around the innovations and infrastructure shaping the future of logistics.

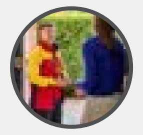
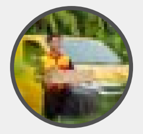
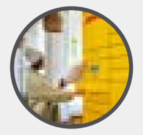
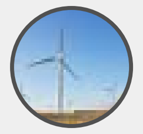
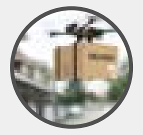
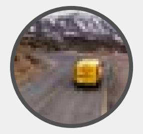
Trust lands with DHL

92%

of shoppers trust DHL with their delivery and returns.

> "Faster delivery is great, but one of the things future technology offers is more predictable and more flexible deliveries. It's much easier to dynamically re-route robots than people, especially if they're bypassing road restrictions as rolling or flying drones."
>
> ***Tom Cheesewright***

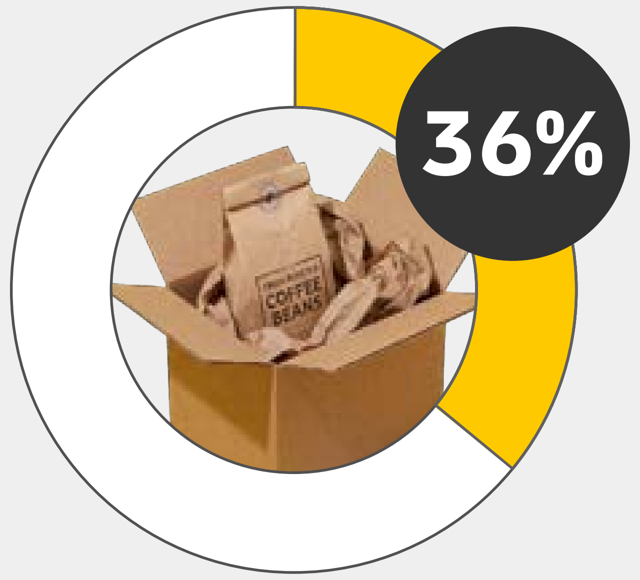
The innovations or improvements shoppers and businesses want logistics providers to prioritize over the next 5 years:

		Global	Europe	Global	Europe
	Same day / faster delivery	50%	54%	48%	38%
	Personalized delivery and return windows	46%	44%	30%	26%
	More parcel shops and locker locations	46%	44%	42%	43%
	Green logistics as standard	42%	40%	30%	27%
	Drone delivery or returns	20%	16%	20%	16%
	Self-driving vehicles and delivery robot	27%	25%	18%	13%

Which shopper and seller bucks the global trends?

29% of hands-free shoppers & **36%** of subscription sellers want to see self-driving vehicles or drones for delivery and returns.

Learn more about hands-free shoppers



Learn more about subscription sellers

In summary...

The trends you can act on.

Shoppers want delivery that fits their lives

Out-of-home delivery is rising fast, with lockers and parcel shops moving from alternative to default in many markets.

As delivery can make or break a sale, businesses need to offer flexible delivery options.

Growth comes from closing the expectation gap

Shoppers want more – across channels, categories, experiences – than many businesses currently offer.

Get closer to shopper expectations, and e-commerce growth follows.

AI adoption depends on trust

Innovation is accelerating, but shoppers will only adopt AI if it feels useful and trustworthy. Businesses are already leaning in, using AI or planning to.

The real opportunity is to apply it where it can add the most value: tackling fraud and making shopping simpler.

The world is shopping globally, but not everywhere wins

More shoppers than ever are buying from abroad. But most of that demand is focused on a few big markets like China and the USA, leaving plenty of gaps elsewhere.

Businesses that follow the shopper, not just the nearest market, will win.

Sustainability works best when it's effortless

Shoppers want greener options and expect businesses to lead. But few are willing to pay more or give up speed and convenience. Interest is growing, but action depends on ease. Build sustainability into the experience, so it happens without shoppers having to think twice.

Ready to act? See how DHL can help you get there

The people, businesses and countries behind the numbers.

Generations

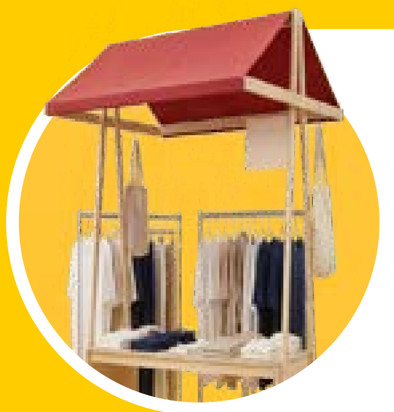
Each generation shops differently. Discover what drives them and how their habits shape e-commerce today.

Shopper Profiles

What drives someone to buy? Explore the shopper types behind the data and what influences their decisions.

Business Sizes

From sole traders to global enterprises, see how businesses of different sizes approach e-commerce.



Business Models

From social-first sellers to cross-border exporters, discover the different ways businesses compete online.

Countries

Discover how shopping habits vary by country, and what it means for brands selling globally.

Different generations, different buying mindsets.

Generation Z
(born 1997-2012)

58%	have purchased something through TikTok
41%	are influenced by posts by influencers or celebrities
32%	expect to shop more via social media over the next 5 years

Millennials
(born 1981-1996)

62%	have sold something online through a marketplace
56%	will increase their number of product subscriptions over the next 5 years
32%	make a purchase online more than once a week

Generation X
(born 1965-1980)

68%	have bought an item or product through Facebook
46%	want to use AI in the future to compare prices
43%	redirect their delivery to a safe place or a neighbor

Baby Boomers
(born 1946-1964)

55%	prefer OOH pick up points due to their flexibility
53%	return items through a parcel shop / convenience store
51%	have a logistics subscription for priority service

From impulse to intention: shopper types decoded.

Convenience shopper

"Above all, I want fast, free delivery and easy returns"

60% would use retailer recycling or buy-back programs if offered free returns.

45% want to use AI in the future to help find the best deals more easily and faster

43% don't buy from other countries due to high delivery costs/long delivery times

Global shopper

"I have purchased from retailers outside my own country"

75% would not shop from a brand if they did not trust the delivery provider

62% currently use a digital wallet when making payments online

59% would be encouraged to buy from other countries if they offer free delivery

Deal seeker

"I'm always hunting for the best price"

67% subscribe to products to get discounted or preferential pricing

62% buy from retailers in other countries to get lower prices

58% abandon their basket if their discount code doesn't work

Eco shopper

"I choose sustainable products or delivery options"

39% plan to shop more on online marketplaces over the next 5 years

35% want to see green logistics as standard in the next 5 years

17% buy from retailers in other countries for more sustainable or ethical sourcing

App-first shopper

"I shop mainly through a retailers or marketplace apps"

67% subscribe to products for discounted or preferential pricing

60% predominantly return unwanted goods via OOH locations

50% want to use AI for virtual try-on/fit in the future

Secondhand shopper

"I have purchased refurbished or pre-owned items online"

80% would abandon their purchase if they were not offered the delivery options they wanted

68% have sold something online through a marketplace

67% have purchased an item through Facebook

From impulse to intention: shopper types decoded.

Easily influenced shopper

“I have made a purchase from shoppable ads online and on TV”

45% are influenced by shoppable posts on social media

42% would be encouraged to buy from a retailer in another country by customer reviews

33% are motivated to shop during seasonal holidays by seasonal marketing and adverts

AI-assisted shopper

“I have used AI-powered chat or virtual assistants to browse or buy”

94% use AI-powered chat tools when shopping online

60% have experienced AI for product reviews and images when shopping online

59% plan to increase the number of product subscriptions over the next 5 years

Social shopper

“I have purchased via TikTok, Instagram, Facebook”

64% have sold something online through a C2C marketplace

54% would like to see same-day / even faster delivery and return services in the next 5 years

37% make online purchases at least two times per week

Subscription shopper

“I use auto-replenish or item subscription services”

66% completely or mostly trust seasonal offers and prices

40% are influenced by posts by influencers or celebrities

36% would like to have personalized delivery and return windows in the next 5 years

Brand lover

“I prefer premium or designer brands”

57% abandon their online purchase due to lack of security badges on the site

50% treat themselves during seasonal holidays

44% buy from other countries to get better quality products

Hands-free shopper

“I have used voice commands or smart speakers to shop”

72% have a delivery and returns subscription

68% have abandoned online purchases due to the returns offering

57% are likely to let AI make shopping decisions or purchases for them in the next 5 years

How selling evolves from solo to scale.

Sole trader

53% do not sell internationally because of customs, duties or taxes

42% of potential customers abandon on their cart at the shipping options page

36% post educational, 'how to' type content on their social media

Micro enterprise

62% look at transit times when selecting a logistics provider

57% drop their shipments off directly to parcel shops and lockers

54% do not sell internationally due to high delivery costs and delivery times

Small enterprise

61% think they will expand internationally over the next 5 years

36% plan to accept BNPL payments in the next 5 years

31% have no concerns about using AI in their business

Medium enterprise

72% say OOH locations are essential to securing sales and getting repeat business

62% currently offer a delivery and returns subscription

62% prefer working with a sales rep when setting up a new logistics provider

Large enterprise

76% use some form of AI across their e-commerce platform

75% sell internationally

40% will prioritize investment into same-day delivery over the next year

The sellers behind the storefront.

Marketplace seller

"I sell through online marketplaces"

76% believe having a social media profile is the best way to acquire new customers

63% say offering discounts and offers aids cart conversion

41% will prioritize investment into next day delivery over the next 12 months

Eco-friendly seller

"I offer customers eco-friendly delivery and returns options"

92% regularly review their delivery and returns offering

79% believe DHL is very/quite sustainable

61% plan to expand to sell to international markets over the next 5 years

Social media seller

"I allow customers to browse and buy through social media platforms"

59% believe offering free delivery aids conversion on their e-commerce platform

53% say trust in the delivery brand in-country is a priority when choosing a logistics provider

35% have no concern about using AI in their business

Subscription seller

"I offer customers products or services through a subscription model"

84% believe online shoppers completely trust offers and prices during seasonal holidays

70% work with influencers on social media to promote their brand/products

62% have sold a product over TikTok

Cross-border seller

"I sell products to customers in international markets"

66% are currently using at least 3 logistics brands for their deliveries and returns

63% ensure their store is available in the local language and currency for international shoppers

35% say potential customers abandon their carts because the checkout is too complicated

Pre-owned/refurbished seller

"I sell pre-owned or refurbished products"

62% allow shoppers to browse and buy through social media

52% build the logistics cost into the product offering to offer free delivery and returns

44% currently use AI for content production

How the world shops and sells online

E-commerce around the world.

Select a country to explore market insights – from shopper personas and buying behaviors to sales channels, exports and key markets. Compare platform trends and see how delivery and returns preferences vary by country.

- **Argentina**
- **Australia**
- **Austria**
- **Belgium**
- **Brazil**
- **Canada**
- **China**
- **Czech Republic**
- **Denmark**
- **France**
- **Germany**
- **India**
- **Ireland**
- **Italy**
- **Malaysia**
- **Netherlands**
- **Nigeria**
- **Poland**
- **Portugal**
- **Saudi Arabia**
- **South Africa**
- **Spain**
- **Sweden**
- **Thailand**
- **Türkiye**
- **UAE**
- **UK**
- **USA**

2026 e-commerce trends by country: Global shopper and business insights

What's happening in your market and the destinations you want to expand into? **Click to find out or head to dhl.com/2026-country-reports**

Explore the map

Meet applied futurist: Tom Cheesewright

Meet the Applied Futurist: Tom Cheesewright.

Tom Cheesewright is an Applied Futurist, telling stories of tomorrow for the world's biggest brands.

He helps leaders to see the future more clearly and tell their stories to the audiences that matter, whether that's the board, their staff, or their customers and prospects. Trusted by more than 30 of the global 500, as well as major government bodies such as NASA, Tom is in demand as a consultant, commentator, speaker and spokesperson.

Tom is recognised from his thousands of media appearances, explaining tomorrow's world across TV, radio, print and online. He's currently the resident expert on BBC Radio 4 series Dough and a frequent contributor to BBC Breakfast and News, but has also appeared on popular shows such as Sunday Brunch, You and Yours, and The Big Questions.

The author of three acclaimed books, Tom brings huge credibility to the stage, using his storytelling skills to teach audiences new skills, shift their thinking, and leave them inspired.

Podcast spotlight

Tom also joins Pablo Ciano, CEO of DHL eCommerce, on the Unpacking Success podcast to discuss the trends shaping the future of e-commerce.

Coming soon

Available from Aug 2026

That’s a wrap!

You've mapped what's next, now make your move.

The future of e-commerce is in motion, and shoppers are in the driving seat.

They expect more, switch faster, and think beyond borders. They want value but won't tolerate friction. They'll embrace innovation, but only if they trust it. And they're clear about what they want, from subscriptions to delivery to the role of AI.

Businesses are responding, but not always where it counts. Too often, supply lags demand, and innovation outpaces adoption. Now is the time to close that gap.

We hope these insights help you move forward, turning what's next into meaningful action for your customers.

Pablo Ciano, CEO – DHL eCommerce

"Thank you for taking the time to read our annual E-Commerce Trends Report. Now, in its fifth year, it offers a unique perspective on the shifts shaping the future of the industry in which we operate.

Consumer expectations are rising across every dimension – including where and who they buy from, how those orders are delivered and even the growing role of AI in supporting or even making shopping decisions on their behalf.

For businesses, that creates both pressure and opportunity. Those who can meet the consumers' needs going forward and bridge that expectation gap, will be best positioned for growth."

Ready to grow your business?

DHL eCommerce is here to help you reach more shoppers, locally and globally. Our reliable, flexible and sustainable delivery and returns services support you at every stage of the journey.

Connect with our experts to see how we can help you deliver what's next

Find out more

Appendix

A snapshot of the data behind the insights

In the next five years, where do shoppers expect to browse and shop more? (A)

	Retailer Websites			Social Media			Product Subscriptions			On Apps			AI-Powered Chat or Virtual Assistants		
	More	About the same	Less	More	About the same	Less	More	About the same	Less	More	About the same	Less	More	About the same	Less
Argentina	29	52	7	27	40	22	12	35	35	44	40	10	16	27	32
Australia	28	64	6	19	50	21	11	47	22	26	53	12	21	34	25
Austria	15	65	12	9	45	29	7	46	28	16	58	14	13	37	26
Belgium	21	61	9	10	42	29	6	40	28	21	52	14	12	34	28
Brazil	41	47	6	31	38	16	20	37	21	53	40	4	25	31	22
Canada	23	65	6	15	52	18	12	49	22	20	57	12	17	37	21
China	40	45	9	41	41	12	21	43	23	43	42	9	32	37	19
Czech Republic	17	65	8	9	47	22	8	44	24	21	57	10	13	34	21
Denmark	20	66	7	10	55	21	9	50	22	18	57	12	15	37	22
France	14	66	9	10	40	26	7	39	25	13	57	15	10	30	26
Germany	20	65	9	15	47	21	11	43	27	21	55	13	16	38	23
India	52	40	7	38	34	18	28	38	21	60	31	7	42	31	14
Italy	23	63	7	16	46	21	12	47	22	17	54	13	22	41	20
Malaysia	38	46	9	46	38	10	20	44	19	32	43	11	27	35	13
Morocco	56	33	6	45	38	10	20	39	23	51	33	10	28	25	22
Netherlands	20	68	7	10	47	26	7	48	27	20	56	13	18	36	23
Nigeria	64	26	5	58	27	8	35	31	19	66	26	6	42	27	15
Poland	15	70	7	11	49	22	10	47	21	21	61	8	13	38	21
Portugal	20	67	6	9	50	24	8	49	23	23	62	9	14	41	20
Saudi Arabia	54	38	4	34	40	16	25	43	19	51	38	7	34	33	15
South Africa	58	35	3	36	36	16	25	37	20	55	37	4	33	29	16
Spain	22	63	8	17	42	29	14	50	23	31	53	9	18	39	26
Sweden	18	70	8	8	50	28	5	40	32	14	63	15	10	35	25
Switzerland	17	66	11	13	45	26	7	41	31	21	54	16	17	32	26
Thailand	49	42	7	55	35	7	33	41	14	46	44	7	44	34	10
Türkiye	31	52	8	16	41	25	18	46	22	32	53	9	26	36	18
UAE	52	40	6	36	44	14	29	41	20	47	42	6	37	36	17
UK	30	61	5	26	49	15	16	49	19	29	55	9	22	39	18
USA	31	59	6	27	47	14	17	47	21	27	53	11	20	36	21
GLOBAL	32	55	7	24	43	19	16	43	23	32	49	10	23	34	21

In the next five years, where do shoppers expect to browse and shop more? (B)

	Voice Commands/Search			Shoppable Ads			Online Marketplaces			International Retailers		
	More	About the same	Less	More	About the same	Less	More	About the same	Less	More	About the same	Less
Argentina	10	23	37	12	31	33	45	38	9	29	37	17
Australia	12	38	27	12	46	24	29	56	11	16	55	18
Austria	7	37	31	6	40	31	25	62	9	15	58	18
Belgium	6	33	31	8	39	30	19	54	16	16	56	17
Brazil	19	32	23	21	37	20	50	41	6	30	43	15
Canada	10	42	22	10	48	23	30	57	7	13	52	20
China	26	38	22	30	41	21	45	42	8	23	45	19
Czech Republic	7	34	25	6	35	24	11	48	19	14	52	17
Denmark	8	40	25	9	45	24	17	54	16	17	54	16
France	6	32	30	6	39	27	19	61	11	11	51	20
Germany	11	42	23	9	43	26	27	58	10	15	50	21
India	31	36	18	32	37	19	68	28	3	27	35	21
Italy	14	43	23	12	45	24	37	52	6	20	55	14
Malaysia	17	39	17	27	42	15	27	37	17	25	39	17
Morocco	19	26	25	33	39	15	49	30	9	48	32	10
Netherlands	8	38	27	7	44	27	16	58	17	15	54	20
Nigeria	30	29	17	44	34	13	67	22	6	58	26	8
Poland	9	39	21	9	47	21	17	55	14	14	58	13
Portugal	7	39	26	5	42	27	24	60	10	18	63	10
Saudi Arabia	24	34	19	29	41	18	51	37	8	40	40	11
South Africa	24	32	20	28	43	16	55	36	5	51	35	7
Spain	14	37	30	9	41	32	40	50	7	15	56	18
Sweden	6	32	29	5	44	27	13	57	20	8	51	28
Switzerland	7	37	29	8	42	28	18	57	16	17	57	15
Thailand	32	40	11	34	39	15	34	38	14	33	36	15
Türkiye	17	38	21	17	44	21	31	48	13	21	44	20
UAE	30	35	19	32	39	17	51	39	7	38	43	11
UK	15	43	19	18	49	17	39	52	6	20	52	15
USA	16	43	20	19	49	18	35	53	7	16	45	22
GLOBAL	15	36	24	17	42	22	34	48	11	23	47	16

In the next five years, where do shoppers expect to browse and shop more? (A)

	Retailer Websites			Social Media			Product Subscriptions			On Apps		
	More	About the same	Less	More	About the same	Less	More	About the same	Less	More	About the same	Less
Gen Z	41	38	38	41	38	38	41	38	38	41	42	11
Millennials	37	38	43	37	38	43	37	38	43	37	48	9
Gen X	29	35	41	29	35	41	29	35	41	30	52	9
Baby Boomers	19	32	38	19	32	38	19	32	38	17	55	13
Deal Seeker	34	37	40	34	37	40	34	37	40	33	49	10
Social Shopper	34	37	40	34	37	40	34	37	40	44	43	8
ECO Shopper	37	39	43	37	39	43	37	39	43	38	47	9
Global Shopper	36	39	42	36	39	42	36	39	42	35	50	9
Subscription Shopper	40	42	45	40	42	45	40	42	45	45	43	8
Convenience Shopper	35	37	41	35	37	41	35	37	41	33	49	10
Brand Lover	40	41	44	40	41	44	40	41	44	44	43	8
Secondhand Shopper	37	39	42	37	39	42	37	39	42	37	48	9
App-First Shopper	36	38	41	36	38	41	36	38	41	38	48	8
AI-Assisted Shopper	40	42	45	40	42	45	40	42	45	47	42	7
Hands free Shopper	42	43	46	42	43	46	42	43	46	50	39	8
Easily Influenced Shopper	38	42	45	38	42	45	38	42	45	45	42	8

In the next five years, where do shoppers expect to browse and shop more? (B)

	AI-Powered Chat or Virtual Assistants			Voice Commands/Search			Shoppable Ads			Online Marketplaces			International Retailers		
	More	About the same	Less	More	About the same	Less	More	About the same	Less	More	About the same	Less	More	About the same	Less
Gen Z	25	32	26	17	35	29	22	40	25	42	39	12	30	43	18
Millennials	28	37	18	19	40	21	21	44	21	39	46	9	28	48	14
Gen X	23	36	18	15	37	21	16	44	20	31	51	10	22	50	15
Baby Boomers	13	31	21	8	32	23	7	38	24	22	56	11	12	49	19
Deal Seeker	23	34	21	15	36	24	17	41	22	35	47	10	24	47	16
Social Shopper	32	34	18	24	37	20	29	44	17	45	40	9	34	43	14
ECO Shopper	27	34	20	19	37	22	22	42	21	39	44	10	28	46	15
Global Shopper	25	35	20	17	37	23	19	43	21	36	49	9	29	53	12
Subscription Shopper	34	37	17	27	40	19	30	43	18	46	41	9	36	45	13
Convenience Shopper	23	34	21	16	36	24	18	42	22	35	47	10	24	47	16
Brand Lover	32	36	18	24	38	21	28	42	19	45	41	9	34	44	14
Secondhand Shopper	28	36	19	20	38	22	23	43	20	39	46	9	29	48	15
App-First Shopper	26	34	20	18	36	22	20	42	21	39	45	9	27	46	15
AI-Assisted Shopper	41	40	12	27	42	18	29	45	17	48	40	8	36	44	13
Hands free Shopper	42	38	13	38	44	12	38	43	14	50	38	9	40	43	12
Easily Influenced Shopper	33	35	18	25	38	20	31	45	16	46	40	9	35	43	14

In the next five years, how do businesses expect customers' browsing and buying behavior to change across the following channels? (A)

	Retailer Websites			Social Media			Product Subscriptions			On Apps			AI-Powered Chat or Virtual Assistants		
	More	About the same	Less	More	About the same	Less	More	About the same	Less	More	About the same	Less	More	About the same	Less
Argentina	61	34	4	75	22	2	40	51	6	51	41	5	60	20	10
Australia	48	49	3	48	45	6	35	53	9	33	53	8	40	47	11
Austria	77	19	5	51	46	3	53	34	13	50	40	8	63	32	6
Belgium	43	45	8	47	36	13	34	47	11	45	37	13	45	38	11
Brazil	69	26	3	74	22	2	44	43	7	64	30	4	68	21	5
Canada	52	42	5	57	37	3	33	45	10	40	46	6	53	32	7
China	48	40	12	56	30	14	40	42	16	46	40	13	55	31	13
Czech Republic	49	44	7	52	36	8	39	40	14	54	34	7	60	22	8
Denmark	68	26	2	46	46	4	62	22	10	56	34	2	48	24	16
France	56	35	5	52	35	9	28	52	10	48	37	7	52	33	7
Germany	54	41	4	51	41	6	37	49	10	42	44	9	51	41	5
India	75	25	0	79	19	2	47	47	4	70	25	4	66	28	4
Italy	57	41	2	62	32	6	33	49	12	43	40	9	59	29	7
Malaysia	90	8	1	91	6	3	86	11	2	88	8	2	82	14	2
Netherlands	59	36	5	64	29	6	49	37	7	64	29	4	66	29	2
Nigeria	90	10	0	84	14	2	75	21	2	75	21	4	75	18	3
Poland	50	43	6	59	31	4	39	36	14	48	36	8	52	32	6
Portugal	66	31	1	62	31	5	41	46	7	57	32	5	61	26	6
Saudi Arabia	81	17	2	75	21	3	63	32	3	77	21	0	63	23	12
South Africa	85	13	2	85	13	1	67	22	6	73	20	2	67	18	5
Spain	53	41	5	50	37	12	36	44	15	44	42	10	51	34	10
Sweden	70	26	4	60	35	4	35	49	10	57	35	7	62	23	10
Switzerland	70	26	4	54	34	11	38	48	8	54	36	9	51	31	12
Thailand	58	16	0	42	31	1	40	31	2	47	26	0	49	22	2
Türkiye	70	28	2	77	20	2	53	41	4	64	32	4	67	21	8
UAE	67	31	2	68	27	5	52	35	12	65	25	9	59	33	4
UK	51	44	4	63	34	2	43	42	8	49	41	5	55	35	6
USA	58	38	3	74	22	2	44	44	6	56	38	2	63	28	3
GLOBAL	63	32	4	64	29	5	45	40	9	55	34	6	59	28	7

In the next five years, how do businesses expect customers' browsing and buying behavior to change across the following channels? (B)

	Voice Commands/Search			Shoppable Ads			Online Marketplaces			International Retailers		
	More	About the same	Less	More	About the same	Less	More	About the same	Less	More	About the same	Less
Argentina	34	47	9	43	43	8	55	38	3	49	32	11
Australia	37	51	6	40	51	7	45	48	7	33	58	7
Austria	53	40	5	59	34	7	56	34	9	56	36	7
Belgium	35	47	9	36	49	11	40	43	13	40	43	12
Brazil	49	35	6	51	35	9	61	32	3	44	40	10
Canada	30	47	8	39	48	6	43	44	6	33	45	10
China	42	42	13	46	38	13	46	40	13	48	40	9
Czech Republic	33	41	11	39	40	11	33	49	11	43	38	10
Denmark	42	34	12	52	42	0	44	42	4	40	50	2
France	32	48	9	42	44	6	40	44	9	36	46	8
Germany	39	44	12	42	47	6	47	44	7	36	49	10
India	52	37	9	68	25	6	78	20	3	51	40	5
Italy	47	37	10	49	40	8	58	35	5	38	47	11
Malaysia	62	32	4	73	21	4	79	17	2	75	17	5
Netherlands	40	46	4	52	38	5	51	39	9	48	40	9
Nigeria	70	24	2	72	27	0	77	20	3	83	13	2
Poland	37	38	13	46	36	11	44	41	11	40	40	10
Portugal	39	39	10	42	39	11	50	38	9	48	39	8
Saudi Arabia	56	36	5	70	28	1	69	29	2	66	30	2
South Africa	54	30	6	73	20	5	74	18	3	68	19	5
Spain	34	54	8	44	38	14	52	39	6	31	55	10
Sweden	24	53	12	44	45	6	39	48	9	37	45	9
Switzerland	37	45	11	47	37	9	39	46	10	42	45	7
Thailand	37	33	1	49	23	1	43	26	4	43	27	2
Türkiye	56	36	4	66	31	1	68	27	3	60	34	4
UAE	36	50	11	54	38	8	64	32	4	54	38	6
UK	36	41	12	42	47	6	51	40	6	38	47	7
USA	40	45	5	53	39	5	62	34	1	34	48	6
GLOBAL	42	41	9	51	37	7	54	36	6	46	40	8

Have shoppers ever purchased items on the following platforms?

	Facebook	Instagram	TikTok	Pinterest	Snapchat	YouTube	Twitch
Argentina	77	63	14	5	1	13	2
Australia	77	52	46	12	13	36	8
Austria	58	54	44	11	10	29	3
Belgium	62	46	45	10	19	30	3
Brazil	59	67	69	13	5	34	5
Canada	81	40	32	17	15	31	7
Czech Republic	83	29	17	6	4	20	3
Denmark	83	36	28	8	15	24	5
France	53	38	56	9	26	23	7
Germany	51	52	63	15	13	34	10
India	74	83	12	25	24	71	8
Italy	52	40	61	8	7	24	4
Malaysia	50	33	95	3	2	16	1
Morocco	86	62	40	5	3	28	2
Netherlands	58	49	38	13	14	26	5
Nigeria	86	64	56	15	14	40	5
Poland	75	36	36	10	10	29	5
Portugal	76	51	26	8	4	22	7
Saudi Arabia	38	58	77	13	51	39	7
South Africa	85	41	56	19	5	36	4
Spain	48	48	63	9	6	27	8
Sweden	74	45	36	6	12	22	3
Switzerland	57	52	42	13	11	27	6
Thailand	67	28	93	4	3	26	7
Türkiye	43	85	31	10	7	34	8
UAE	68	67	57	15	24	41	7
UK	62	41	72	12	15	27	6
USA	70	47	67	16	19	41	8
GLOBAL	63	48	50	10	11	29	5

	WeChat	Weibo	Douyin	Pinterest	Snapchat	YouTube	Twitch
China	63	17	88	51	35	41	10

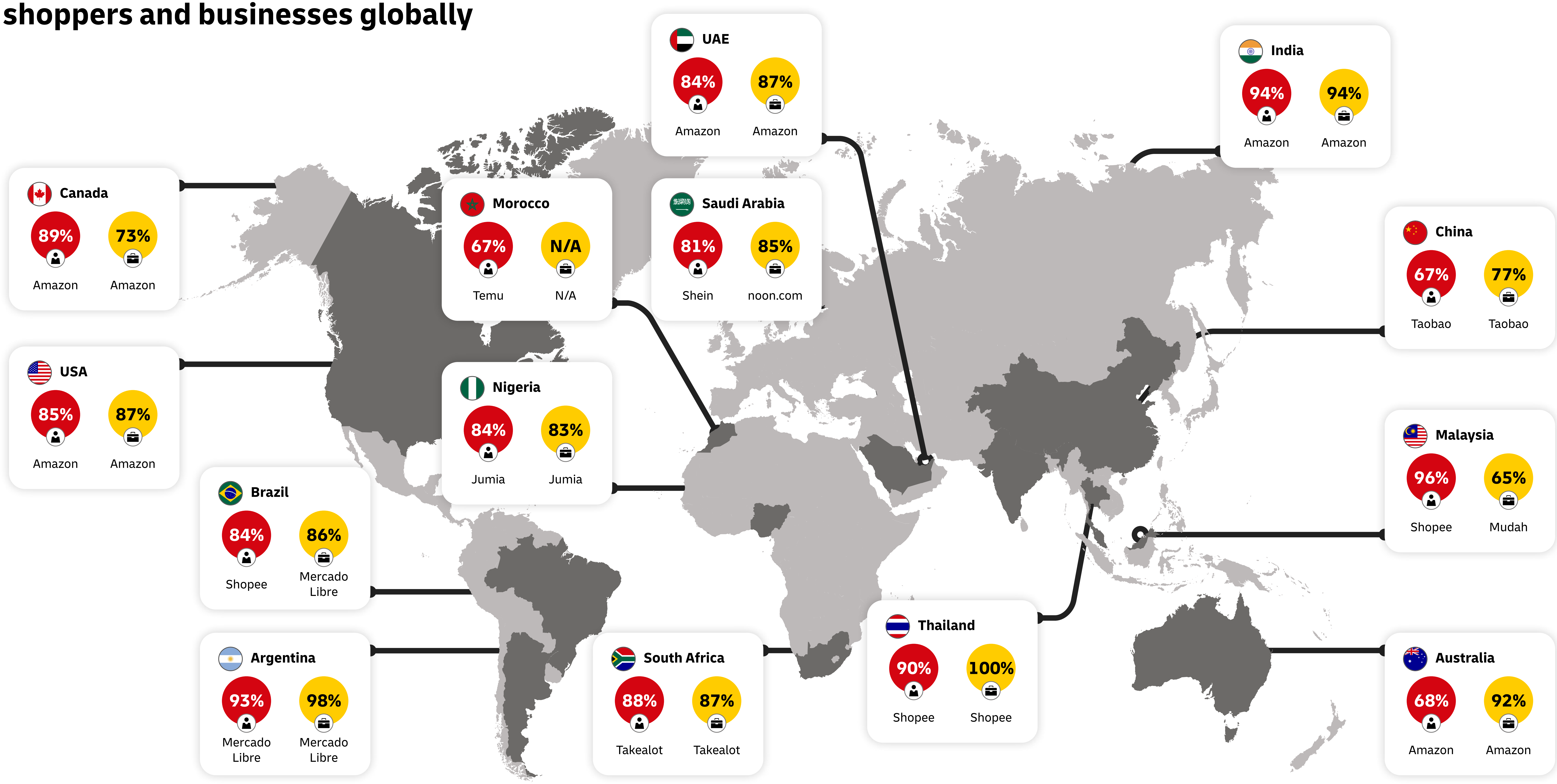
	Facebook	Instagram	TikTok	Pinterest	Snapchat	YouTube	Twitch
Gen Z	50	56	58	11	14	26	5
Millennials	68	51	51	11	13	32	6
Gen X	68	40	44	9	8	29	3
Baby Boomers	77	30	33	9	7	27	3
Deal Seeker	64	48	51	10	11	29	5
Social Shopper	63	48	50	10	11	29	5
ECO Shopper	64	50	52	11	13	32	6
Global Shopper	65	51	52	12	13	31	6
Subscription Shopper	65	56	56	14	17	38	8
Convenience Shopper	63	48	50	10	11	29	5
Brand Lover	64	54	55	13	16	36	7
Secondhand Shopper	67	51	51	12	14	33	7
App-First Shopper	64	49	52	11	12	31	6
AI-Assisted Shopper	66	55	54	14	16	38	7
Hands free Shopper	67	58	57	17	21	44	10
Easily Influenced Shopper	65	54	53	12	14	34	6

Which channels have businesses sold on?

	Facebook	LinkedIn	Instagram	TikTok	Pinterest	Snapchat	YouTube	Twitch
Argentina	81	16	84	34	5	3	28	6
Australia	82	20	58	78	13	20	69	21
Austria	65	40	76	57	36	28	50	7
Belgium	82	23	74	60	21	27	58	8
Brazil	70	12	92	50	12	6	41	7
Canada	87	22	65	47	18	14	45	3
Czech Republic	89	18	79	37	15	7	48	13
Denmark	96	19	74	56	4	26	67	15
France	76	13	72	62	18	34	39	9
Germany	82	31	70	64	20	23	57	19
India	91	43	98	16	32	45	82	18
Italy	82	19	73	47	18	6	40	9
Malaysia	61	47	68	59	39	45	43	2
Netherlands	79	7	81	45	19	12	48	10
Nigeria	99	42	92	81	36	44	69	28
Poland	91	12	65	49	10	9	51	9
Portugal	89	17	81	39	12	5	28	6
Saudi Arabia	78	19	93	80	43	86	76	18
South Africa	93	30	71	73	22	12	53	8
Spain	63	26	81	50	16	11	36	9
Sweden	77	15	84	58	26	30	51	4
Switzerland	91	63	81	66	39	43	67	22
Thailand	100	1	16	24	1	1	19	3
Türkiye	53	12	91	47	14	9	51	7
United Arab Emir-	82	37	75	73	15	40	52	18
United Kingdom	76	33	77	75	23	22	50	16
USA	88	17	79	76	25	25	57	15
GLOBAL	78	24	73	53	20	21	48	11

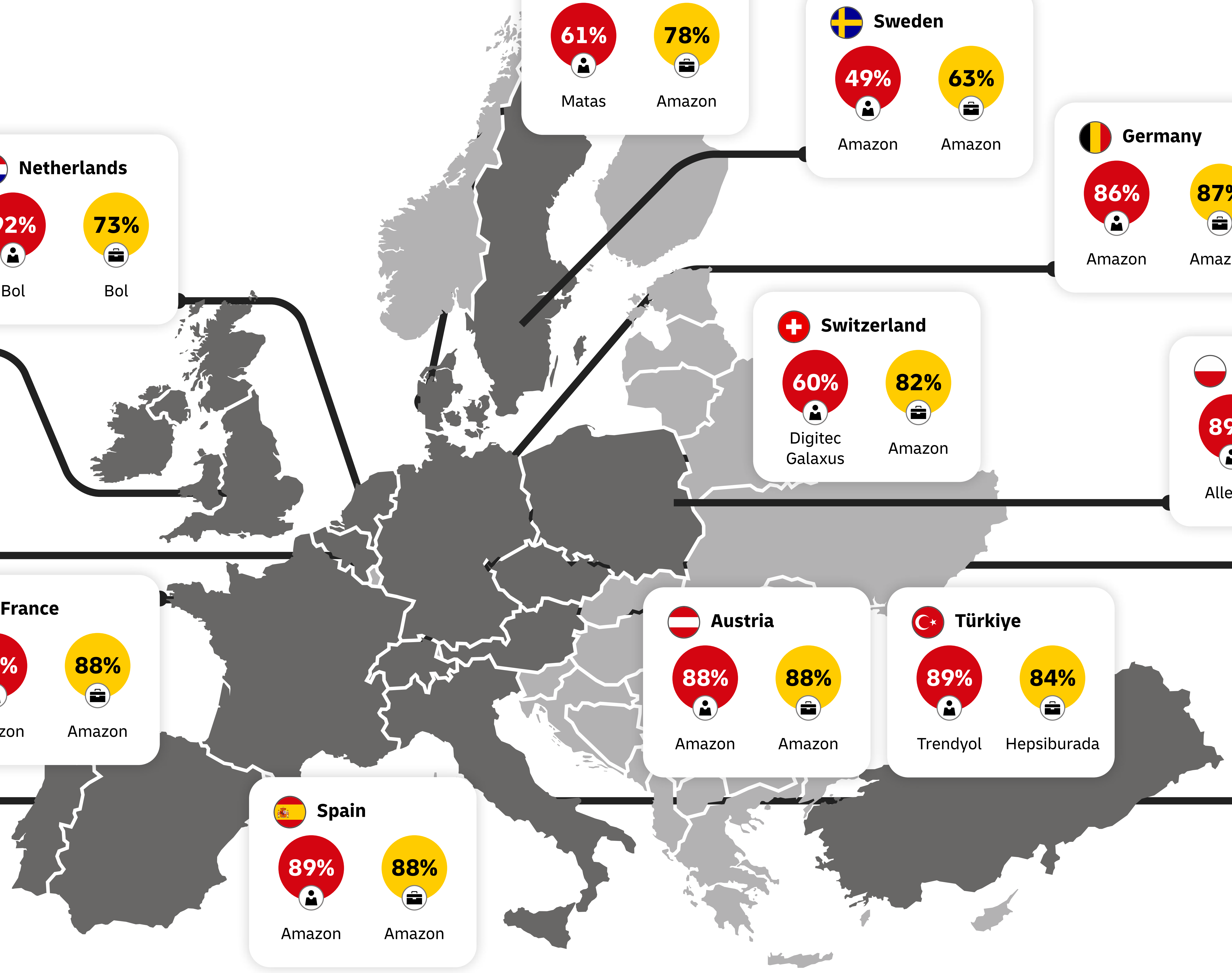
	WeChat	Weibo	Douyin	Pinterest	Snapchat	YouTube	Twitch
China	69	34	88	53	35	54	21

Most popular online marketplaces for shoppers and businesses globally



Canada	89%	Amazon	73%	Amazon
USA	85%	Amazon	87%	Amazon
Brazil	84%	Shopee	86%	Mercado Libre
Argentina	93%	Mercado Libre	98%	Mercado Libre
Morocco	67%	Temu	N/A	N/A
Nigeria	84%	Jumia	83%	Jumia
UAE	84%	Amazon	87%	Amazon
Saudi Arabia	81%	Shein	85%	noon.com
South Africa	88%	Takealot	87%	Takealot
Thailand	90%	Shopee	100%	Shopee
India	94%	Amazon	94%	Amazon
China	67%	Taobao	77%	Taobao
Malaysia	96%	Shopee	65%	Mudah
Australia	68%	Amazon	92%	Amazon

Most popular online marketplaces for shoppers and businesses in Europe



Denmark	61%	Matas	78%	Amazon
Sweden	49%	Amazon	63%	Amazon
Germany	86%	Amazon	87%	Amazon
Netherlands	92%	Bol	73%	Bol
Switzerland	60%	Digitec Galaxus	82%	Amazon
UK	87%	Amazon	78%	Amazon
Poland	89%	Allegro	92%	Allegro
Belgium	64%	Amazon	91%	Amazon
Czech Republic	67%	Alza	62%	Aukro
France	85%	Amazon	88%	Amazon
Austria	88%	Amazon	88%	Amazon
Türkiye	89%	Trendyol	84%	Hepsiburada
Portugal	66%	Temu	71%	Amazon
Spain	89%	Amazon	88%	Amazon
Italy	92%	Amazon	78%	Amazon

How do shoppers predominantly send products that they have sold on online marketplaces?

	Collection only	Parcel Lockers	Parcel Shops
Argentina	54	13	32
Australia	63	14	23
Austria	36	30	34
Belgium	35	26	38
Brazil	64	17	19
Canada	72	7	21
China	23	65	12
Czech Republic	27	38	36
Denmark	31	29	39
France	17	36	47
Germany	30	33	37
India	62	16	23
Italy	36	26	39
Malaysia	49	16	35
Morocco	65	21	14
Netherlands	33	37	30
Nigeria	61	13	26
Poland	13	69	18
Portugal	22	71	7
Saudi Arabia	54	32	15
South Africa	51	19	30
Spain	30	33	37
Sweden	35	23	42
Switzerland	46	34	20
Thailand	23	12	65
Türkiye	64	23	13
UAE	53	36	11
UK	35	29	36
USA	57	16	27
GLOBAL	41	30	29

How much do shoppers trust the offers and prices from retailers during the seasonal holidays?

	Completely and mostly trust	Somewhat trust	Rarely and do not trust at all
Argentina	54	33	13
Australia	55	30	15
Austria	44	38	18
Belgium	45	39	16
Brazil	56	33	11
Canada	56	32	13
China	72	23	5
Czech Republic	45	41	14
Denmark	43	41	16
France	42	43	15
Germany	50	34	16
India	77	18	5
Italy	41	48	11
Malaysia	67	27	7
Morocco	51	39	10
Netherlands	39	35	26
Nigeria	72	23	5
Poland	43	33	24
Portugal	36	47	17
Saudi Arabia	66	27	6
South Africa	68	21	10
Spain	52	33	14
Sweden	37	41	23
Switzerland	42	40	19
Thailand	67	29	4
Türkiye	55	29	16
UAE	66	28	7
UK	59	28	14
USA	65	26	10
GLOBAL	54	33	13

	Completely and mostly trust	Somewhat trust	Rarely and do not trust at all
Gen Z	59	32	9
Millennials	60	29	11
Gen X	52	34	14
Baby Boomers	42	38	20
Deal Seeker	54	33	13
Social Shopper	64	28	8
ECO Shopper	60	30	10
Global Shopper	55	32	12
Subscription Shopper	66	26	7
Convenience Shopper	55	33	12
Brand Lover	65	27	8
Secondhand Shopper	58	31	11
App-First Shopper	58	31	11
AI-Assisted Shopper	66	27	8
Hands free Shopper	72	22	6
Easily Influenced Shopper	65	27	7

Which areas will businesses prioritize investment in over the next 12 months?

	Same-day delivery	Next-day delivery	More OOH collection / return options	Carbon-neutral shipping	Automated / AI fulfilment	Cross-border delivery	Eco delivery options	Flexible delivery slots	Local pickup/ drop-off points	Real-time tracking	Alternative pickup points	Delivery drones	Bundled deliveries	"Green slot" incentives	Ultra-precise ETA windows	Subscriptions	No plans
Argentina	49	38	22	8	43	26	28	23	32	45	20	10	34	15	26	32	4
Australia	37	32	18	14	28	23	28	31	23	25	19	17	26	20	23	24	1
Austria	25	31	23	19	24	26	30	27	29	24	26	17	28	18	22	24	1
Belgium	29	28	24	24	29	23	19	27	27	27	17	14	26	19	11	27	5
Brazil	44	40	17	11	50	20	31	43	35	44	20	9	27	16	19	31	3
Canada	35	35	7	15	27	21	26	29	20	38	15	9	28	9	12	28	7
China	23	19	25	16	33	21	24	25	25	29	23	14	26	24	28	18	2
Czech Republic	29	34	34	16	38	27	26	44	37	36	25	8	28	18	17	22	6
Denmark	42	48	22	14	36	6	22	32	20	32	18	12	32	22	14	32	2
France	19	21	11	16	29	15	24	25	28	35	21	9	27	12	13	13	13
Germany	26	34	19	29	34	27	27	27	23	30	19	11	32	25	16	25	6
India	53	56	27	37	43	36	49	59	38	55	37	24	43	40	35	41	0
Italy	28	36	17	31	33	15	28	30	24	40	22	13	30	22	21	22	4
Malaysia	23	24	17	20	26	22	23	30	21	20	16	16	19	25	25	22	0
Netherlands	26	28	15	23	20	15	26	21	17	24	17	7	23	12	24	21	7
Nigeria	51	41	27	21	28	35	33	47	40	51	39	28	34	29	26	43	1
Poland	31	42	31	18	31	38	16	39	32	34	27	8	41	14	18	25	4
Portugal	32	33	26	15	32	37	27	23	35	34	31	7	23	12	19	23	6
Saudi Arabia	45	49	48	28	39	36	42	39	34	45	35	33	42	40	41	40	1
South Africa	58	49	10	12	26	38	34	43	36	59	29	15	39	20	18	38	1
Spain	23	30	22	17	32	19	23	25	28	26	28	8	27	16	20	27	3
Sweden	31	39	23	23	30	15	24	33	29	27	26	9	31	15	14	23	1
Switzerland	24	29	19	16	39	23	34	39	29	35	20	13	22	24	23	22	2
Thailand	16	27	13	9	21	20	12	17	17	26	11	8	17	18	20	11	31
Türkiye	59	51	28	9	32	43	37	28	33	47	28	11	23	21	18	41	0
UAE	39	38	30	25	47	26	40	32	28	41	26	20	30	26	36	25	0
UK	33	40	12	20	25	19	34	37	25	36	21	13	26	17	17	30	4
USA	46	54	11	13	39	17	34	38	21	46	21	9	33	12	19	42	3
GLOBAL	34	36	20	19	33	25	29	33	28	36	24	13	29	20	21	28	4

Which shoppers are embracing new payment methods?

Buy now, pay later

- 49% Sweden
- 42% Hands-free shopper
- 40% Austria
- 39% Malaysia
- 36% Subscription shopper

Gift cards

- 67% India
- 63% Netherlands
- 62% Canada
- 61% USA
- 58% Hands-free shopper

Biometric

- 52% China
- 41% Hands-free shopper
- 38% Nigeria
- 35% Thailand
- 35% Subscription shopper

Stored card

- 42% Hands-free shopper
- 40% Brazil
- 38% USA
- 37% Türkiye
- 37% UK

Subscription payment

- 41% Hands-free shopper
- 39% Subscription shopper
- 33% AI-assisted shopper
- 33% Türkiye
- 31% USA

Cryptocurrency

- 38% Nigeria
- 31% Hands-free shopper
- 24% UAE
- 22% Morocco
- 22% AI-assisted shopper

Do shoppers currently have any delivery and returns subscriptions with retailers where they pay a premium?

	Yes I current have this service	No I don’t currently have this service
Argentina	28	72
Australia	32	69
Austria	35	65
Belgium	37	63
Brazil	35	65
Canada	41	59
China	57	43
Czech Republic	29	71
Denmark	27	73
France	35	65
Germany	38	62
India	61	39
Italy	41	59
Malaysia	42	58
Morocco	36	65
Netherlands	31	69
Nigeria	36	64
Poland	40	60
Portugal	30	70
Saudi Arabia	60	40
South Africa	39	61
Spain	45	55
Sweden	19	81
Switzerland	29	71
Thailand	54	46
Türkiye	60	40
UAE	64	36
UK	46	54
USA	46	54
GLOBAL	40	60

Do businesses currently offer, or plan to offer, a delivery and returns subscription where customers pay a premium?

	Yes, we currently offer this service	No, but we plan to introduce it within the next 5 years	No, and we have no plans to offer this service
Argentina	34	53	13
Australia	70	21	9
Austria	73	16	12
Belgium	43	41	15
Brazil	37	44	19
Canada	36	38	25
China	53	34	12
Czech Republic	45	33	23
Denmark	48	28	24
France	34	30	37
Germany	53	29	17
India	73	27	1
Italy	41	45	15
Malaysia	92	6	2
Netherlands	55	27	18
Nigeria	83	16	1
Poland	37	44	19
Portugal	39	40	22
Saudi Arabia	95	4	1
South Africa	47	43	10
Spain	51	31	18
Sweden	49	29	22
Switzerland	58	23	20
Thailand	53	9	38
Türkiye	59	36	5
UAE	73	24	3
UK	46	37	17
USA	47	38	15
GLOBAL	53	32	16

Which of the following would shoppers be most likely to do in order for their delivery or returns to be more sustainable?

	Have a longer delivery or returns time (consolidated deliveries/returns)	Pay more for your delivery or returns	Switch to collection / drop off	Only buy from retailers who partner with sustainable delivery & returns providers	None of this
Argentina	26	10	14	32	18
Australia	19	9	18	27	27
Austria	23	6	21	23	28
Belgium	17	8	32	17	26
Brazil	21	7	18	38	16
Canada	20	7	18	28	28
China	14	18	38	25	5
Czech Republic	18	8	19	28	29
Denmark	23	9	19	20	28
France	12	7	46	19	17
Germany	21	10	19	25	25
India	19	17	12	46	5
Italy	20	9	24	28	20
Malaysia	25	9	13	38	16
Morocco	22	12	17	41	9
Netherlands	20	9	26	21	25
Nigeria	12	18	11	56	3
Poland	14	8	15	27	36
Portugal	25	4	22	29	20
Saudi Arabia	25	13	18	34	10
South Africa	15	12	20	48	6
Spain	24	8	24	25	19
Sweden	21	7	21	27	25
Switzerland	24	10	18	22	26
Thailand	14	11	10	46	19
Türkiye	17	10	19	41	13
UAE	25	14	20	34	7
UK	18	12	23	25	23
USA	19	15	15	26	25
GLOBAL	20	10	20	31	19

Do businesses use any form of AI across their e-commerce platforms?

	Yes	No
Argentina	64	36
Australia	81	19
Austria	84	17
Belgium	59	41
Brazil	64	36
Canada	54	46
China	78	22
Czech Republic	60	41
Denmark	62	38
France	58	42
Germany	68	32
India	78	22
Italy	59	41
Malaysia	88	12
Netherlands	59	41
Nigeria	88	12
Poland	41	59
Portugal	51	49
Saudi Arabia	70	30
South Africa	59	41
Spain	63	37
Sweden	65	35
Switzerland	74	26
Thailand	63	37
Türkiye	72	28
UAE	91	9
UK	71	29
USA	69	31
GLOBAL	67	33

Is the usage of AI tools going to increase across businesses over the next 5 years?

	Yes	Perhaps	No
Argentina	59	39	2
Australia	75	22	3
Austria	88	11	2
Belgium	62	32	6
Brazil	71	26	3
Canada	58	33	8
China	68	24	8
Czech Republic	63	32	6
Denmark	76	20	4
France	57	35	9
Germany	74	23	3
India	86	13	1
Italy	69	30	1
Malaysia	93	7	1
Netherlands	74	20	6
Nigeria	94	6	0
Poland	49	46	5
Portugal	57	38	5
Saudi Arabia	73	4	23
South Africa	71	27	2
Spain	67	25	8
Sweden	63	33	4
Switzerland	76	19	6
Thailand	58	10	32
Türkiye	84	15	1
UAE	84	15	1
UK	69	27	4
USA	69	27	4
GLOBAL	70	25	5

How do shoppers predominantly have their items delivered?

	Home delivery (or neighbor / safe place)	Parcel locker	Parcel shop / Convenience store
Argentina	79	16	6
Australia	86	11	4
Austria	76	20	3
Belgium	72	12	17
Brazil	94	3	3
Canada	88	8	4
China	41	37	22
Czech Republic	23	56	20
Denmark	29	24	47
France	49	20	31
Germany	72	22	6
India	92	6	2
Italy	60	22	19
Malaysia	89	7	5
Morocco	87	8	5
Netherlands	77	12	11
Nigeria	78	6	17
Poland	24	68	8
Portugal	75	18	7
Saudi Arabia	89	8	3
South Africa	89	6	5
Spain	69	21	10
Sweden	28	45	27
Switzerland	82	15	3
Thailand	92	3	5
Türkiye	89	7	5
UAE	84	12	4
UK	80	12	7
USA	87	9	4
GLOBAL	72	18	11

North America	87	9	4
Latin America	87	9	4
Sub-Saharan Africa	84	6	11
Europe	60	25	15
Middle East	87	9	4
Asia Pacific	80	13	7

Where do shoppers predominantly return unwanted goods?

	Home collection	Parcel locker	Parcel shop / Convenience store
Argentina	31	35	34
Australia	29	22	50
Austria	13	51	36
Belgium	21	21	57
Brazil	33	33	35
Canada	35	14	50
China	53	29	18
Czech Republic	13	48	39
Denmark	12	27	61
France	16	26	58
Germany	23	32	45
India	75	11	14
Italy	35	31	34
Malaysia	48	22	30
Morocco	46	43	12
Netherlands	18	17	66
Nigeria	34	15	51
Poland	8	79	13
Portugal	35	36	29
Saudi Arabia	74	21	5
South Africa	61	11	28
Spain	33	25	41
Sweden	7	29	64
Switzerland	27	44	29
Thailand	54	11	36
Türkiye	67	15	18
UAE	73	23	4
UK	29	25	46
USA	39	18	43
GLOBAL	37	28	35

North America	87	9	4
Latin America	87	9	4
Sub-Saharan Africa	84	6	11
Europe	60	25	15
Middle East	87	9	4
Asia Pacific	80	13	7

When shoppers’ parcels are out for delivery and they’re not home, they prefer to...

	Re-direct to safe place / neighbor	Re-direct to parcel shop	Re-direct to parcel locker	Change delivery day
Argentina	47	32	3	18
Australia	47	27	14	13
Austria	42	29	18	11
Belgium	42	37	11	10
Brazil	67	11	4	19
Canada	40	19	10	32
China	37	26	27	11
Czech Republic	13	31	39	17
Denmark	17	67	10	6
France	16	54	12	18
Germany	48	29	12	12
India	58	14	3	25
Italy	37	28	16	20
Malaysia	57	16	6	22
Morocco	50	21	8	22
Netherlands	39	28	16	18
Nigeria	51	22	4	23
Poland	19	32	39	10
Portugal	49	22	16	14
Saudi Arabia	51	21	6	22
South Africa	49	12	6	33
Spain	40	31	15	14
Sweden	11	38	31	20
Switzerland	45	21	13	22
Thailand	72	11	8	10
Türkiye	71	10	6	12
UAE	47	24	6	23
UK	56	17	10	17
USA	44	12	11	33
GLOBAL	43	26	13	18

Where do businesses drop their shipments off?

	Directly to your logistics provider's depot	To Parcel Shops	To Parcel Lockers
Argentina	59	39	1
Australia	72	23	6
Austria	60	18	21
Belgium	43	40	17
Brazil	49	15	36
Canada	68	27	5
China	62	18	20
Czech Republic	49	34	17
Denmark	64	28	8
France	42	46	13
Germany	58	33	9
India	74	21	5
Italy	62	20	18
Malaysia	72	26	2
Netherlands	66	13	22
Nigeria	81	16	3
Poland	43	44	13
Portugal	50	17	33
Saudi Arabia	73	17	10
South Africa	74	15	10
Spain	48	43	9
Sweden	63	18	18
Switzerland	66	17	17
Thailand	48	6	45
Türkiye	53	34	13
UAE	71	13	16
UK	59	33	8
USA	67	29	4
GLOBAL	60	25	14

Asia Pacific	68	20	12
Europe	54	30	16
Latin America	51	21	28
Middle East	72	15	13
North America	67	28	5
Sub-Saharan Africa	76	15	8

What are the main reasons for returning unwanted items shoppers have purchased online?

	Item too big/too small	Item faulty / poor quality / didn't meet expectations	Goods lost/damaged in transit	Didn't need it anymore / changed mind / ordered more than one size or color	Customs delays / charges / clearing	Ordered more to get free delivery and returned the rest
Argentina	25	64	49	14	17	10
Australia	44	61	43	18	15	10
Austria	62	55	32	20	10	9
Belgium	57	55	30	19	10	12
Brazil	32	73	49	11	19	7
Canada	45	64	39	22	13	10
China	37	68	49	41	23	18
Czech Republic	47	58	36	14	11	8
Denmark	48	49	21	19	12	11
France	52	58	31	15	10	9
Germany	57	51	31	16	10	11
India	40	68	55	22	24	18
Italy	33	56	38	19	12	7
Malaysia	21	75	59	17	15	12
Morocco	48	60	44	12	24	12
Netherlands	58	56	27	19	9	8
Nigeria	28	78	56	14	19	10
Poland	51	63	26	16	10	12
Portugal	41	71	34	13	16	7
Saudi Arabia	62	57	35	20	19	14
South Africa	54	67	47	16	15	8
Spain	36	54	36	21	16	14
Sweden	57	47	27	19	10	10
Switzerland	63	45	27	18	12	11
Thailand	24	61	59	18	17	16
Türkiye	44	68	46	15	17	13
UAE	54	57	38	24	22	18
UK	45	58	39	18	13	13
USA	41	55	43	26	19	14
GLOBAL	46	60	39	19	15	12

What are the main reasons shoppers give businesses for returns?

	Item too big/too small	Item faulty / poor quality / didn't meet expectations	Goods lost/damaged in transit	Didn't need it anymore / changed mind / ordered more than one	Customs delays / charges / clearing	Ordered more to get free delivery and returned the rest
Argentina	23	41	47	46	30	17
Australia	31	33	52	42	30	38
Austria	31	32	34	37	23	33
Belgium	44	31	35	38	29	38
Brazil	27	35	49	34	23	15
Canada	30	37	40	40	28	23
China	23	40	38	33	25	32
Czech Republic	34	44	43	45	24	26
Denmark	40	30	47	28	44	35
France	36	39	46	43	18	17
Germany	34	36	42	50	28	32
India	41	45	51	47	48	36
Italy	26	32	44	35	19	18
Malaysia	25	30	33	27	25	23
Netherlands	28	33	34	41	23	35
Nigeria	50	45	60	42	58	42
Poland	41	23	31	51	18	27
Portugal	26	31	39	36	26	22
Saudi Arabia	55	41	47	39	36	49
South Africa	44	39	46	43	29	22
Spain	28	34	35	43	32	22
Sweden	36	38	42	38	27	27
Switzerland	30	36	30	39	38	33
Thailand	29	37	49	22	23	31
Türkiye	37	43	49	42	36	27
UAE	52	35	53	42	32	29
UK	29	34	42	39	28	26
USA	28	32	44	44	28	18
GLOBAL	33	36	42	40	29	27

When shoppers are returning an item, which of the following do they prefer?

	Return label included	Print label at home	Label-less: scan QR code in store / parcel locker
Argentina	53	20	28
Australia	63	17	20
Austria	53	27	20
Belgium	53	28	19
Brazil	56	13	32
Canada	55	22	22
China	49	14	37
Czech Republic	54	16	31
Denmark	59	12	29
France	54	29	17
Germany	47	25	28
India	55	21	24
Italy	47	30	23
Malaysia	52	18	30
Morocco	58	18	25
Netherlands	50	16	34
Nigeria	66	10	25
Poland	43	19	38
Portugal	61	14	25
Saudi Arabia	47	21	32
South Africa	59	14	27
Spain	46	17	37
Sweden	60	13	27
Switzerland	70	20	10
Thailand	58	19	24
Türkiye	59	18	23
UAE	53	20	28
UK	47	18	35
USA	52	22	25
GLOBAL	54	19	27

How do businesses create a return label for their customers?

	Return label included in the parcel	Print label at home	Label-less: scan QR code in store / parcel locker	Via our logistics provider / within our website
Argentina	38	37	28	20
Australia	59	39	39	23
Austria	60	47	44	19
Belgium	46	51	20	16
Brazil	46	35	26	30
Canada	40	52	19	23
China	36	28	30	48
Czech Republic	47	24	34	30
Denmark	64	46	34	10
France	45	48	22	12
Germany	51	46	37	17
India	69	44	49	38
Italy	47	43	18	26
Malaysia	53	18	45	13
Netherlands	58	26	35	16
Nigeria	82	54	46	19
Poland	44	38	28	21
Portugal	47	33	21	26
Saudi Arabia	85	37	63	43
South Africa	60	16	35	44
Spain	38	40	36	25
Sweden	60	33	19	10
Switzerland	67	60	24	10
Thailand	50	45	7	21
Türkiye	59	29	25	35
UAE	55	35	37	28
UK	51	46	38	18
USA	56	47	26	31
GLOBAL	52	39	31	25

Methodology:

Behind the data

Shoppers

We asked 50+ questions to 29,000 shoppers across 29 countries – 1,000 respondents per country – enabling consistent comparisons between markets.

To take part in the survey, shoppers had to confirm they had purchased an item online within the previous three months, through a retailer's website or app, marketplaces, or social media platforms. Grocery shopping, tickets and flights were excluded.

Businesses

We also surveyed 5,800 businesses across 28 countries, asking 50+ questions about how they sell, operate and plan for the future of e-commerce. To qualify, businesses must have sold products online regularly in the previous three months. The markets included represent some of the world's most active e-commerce economies.

The shopper and business surveys ran in parallel – though not in all countries simultaneously – between December 2025 and February 2026.

Some totals in this report may not equal 100% because certain questions allowed multiple responses. Where totals exceed 100%, this reflects rounding.

This report highlights the key findings from the research. The appendix includes a selection of additional data, but not the full dataset.

Country, regional, generational and shopper profile comparisons appear throughout the report. While they offer valuable directional insight, sample sizes may not be large enough to draw definitive conclusions about specific groups globally.

All figures are correct at the time of publishing.