



GLOBAL RESEARCH REPORT

France: Market Guide to Cross-Border Best Practices

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Overview of this Report

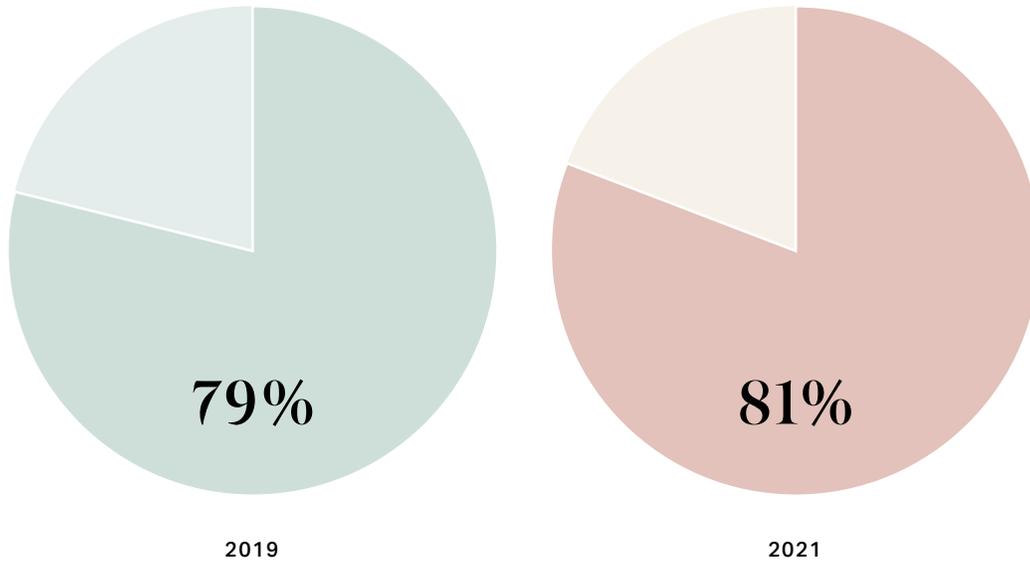
The state of e-commerce is rapidly evolving and it has become increasingly challenging for retailers to keep pace with all the changes in cross-border shopping behaviors and expectations. To that end, Flow commissioned a multi-market research report to uncover patterns in online shopping behaviors for both cross-border and non-cross-border shoppers across the top 8 global markets: Australia, Canada, China, France, Germany, Japan, UK and US.

This report examines shopping expectations and behaviors of online consumers in France. The data gathered examines a number of factors across the customer journey, uncovering insights for online retailers looking to create better localized experiences for French shoppers. Additionally, our analysis helps guide brands to discover further opportunities in the French market by analyzing trends that have emerged as a result of the pandemic. This data is also compared to the information compiled in our pre-pandemic survey, conducted in 2019.

The information here provides an overview of some of the primary data points gathered in our research study. To learn more about consumer preferences in the French market and to access more information from the study, please contact us today at hello@flow.io.

Cross-Border Shopping Habits

Despite the pandemic, cross-border shopping remains very popular among French shoppers. In fact, over 4-in-5 French shoppers (81%) mentioned buying products from retailers outside their home country. This was consistent with the results in the 2019 survey (+2pt).



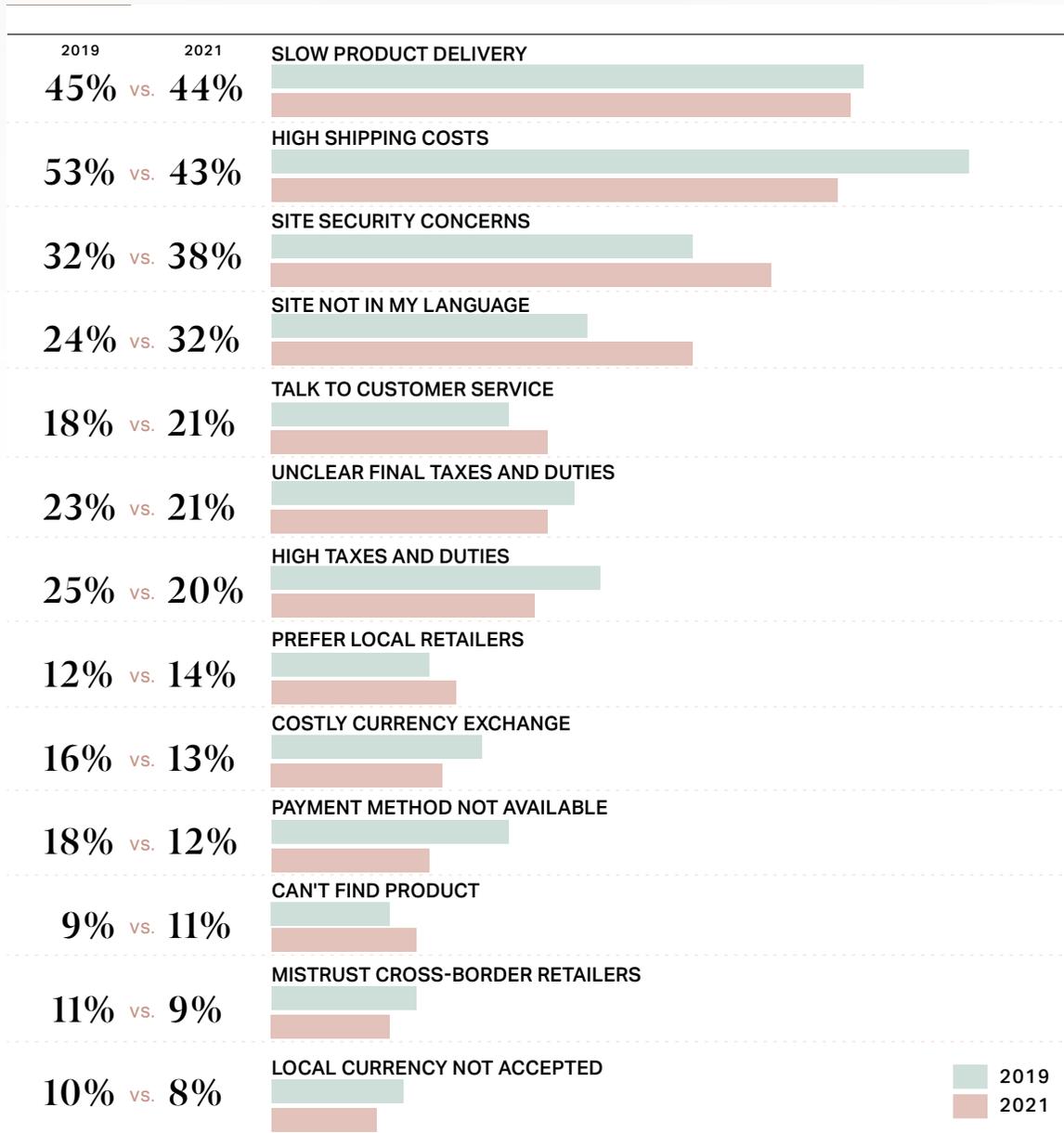
Source: Flow Commerce E-Commerce Survey, 2019 (N=385), 2021 (N=294), French Apparel Shoppers A18-54

81%

of French shoppers have made a cross-border purchase, consistent with results from 2019.

Barriers to Cross-Border Shopping

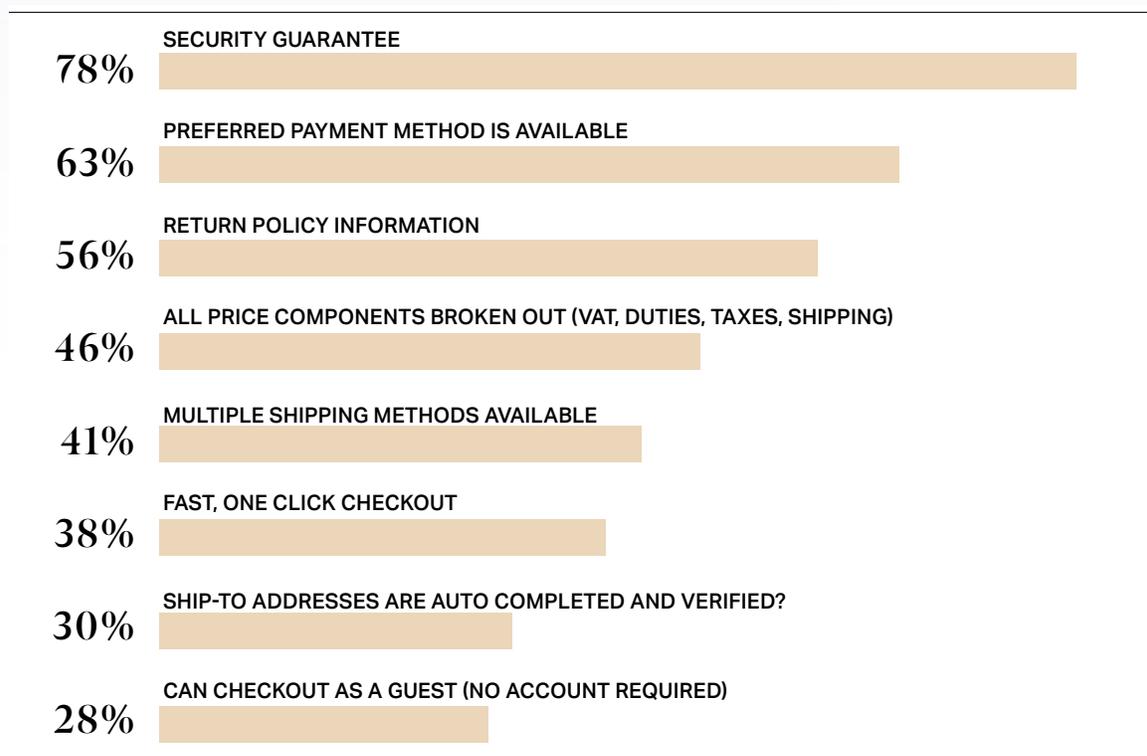
For French shoppers, slow product delivery and high shipping costs remained the top barriers to cross-border shopping, similar to 2019. In terms of trends, we should point out that concerns regarding site security and local language increased notably (+6pt and +8pt respectively) in this market. On the flip side, shipping cost concerns declined significantly (-10pt) even though it is still considered a top barrier.



Source: Flow Commerce E-Commerce Survey, 2019 (N=286), 2021 (N=228), French Apparel Shoppers A18- 54 who shop cross-border

Factors Influencing Online Shopping

Next, we asked French shoppers to rate the importance of various factors when purchasing online, from return policy to shipping methods and one-click checkout. Overall, site security, available payment methods, and return policy ranked in the top 3 as “very important” when making a purchase online (78%, 63% and 56% respectively). Additionally, over 2-in-5 shoppers in this market indicated the importance of having all price components for a product clearly listed and broken out (e.g., VAT, duties, taxes, shipping etc. as separate line items) rather than being included in the price.



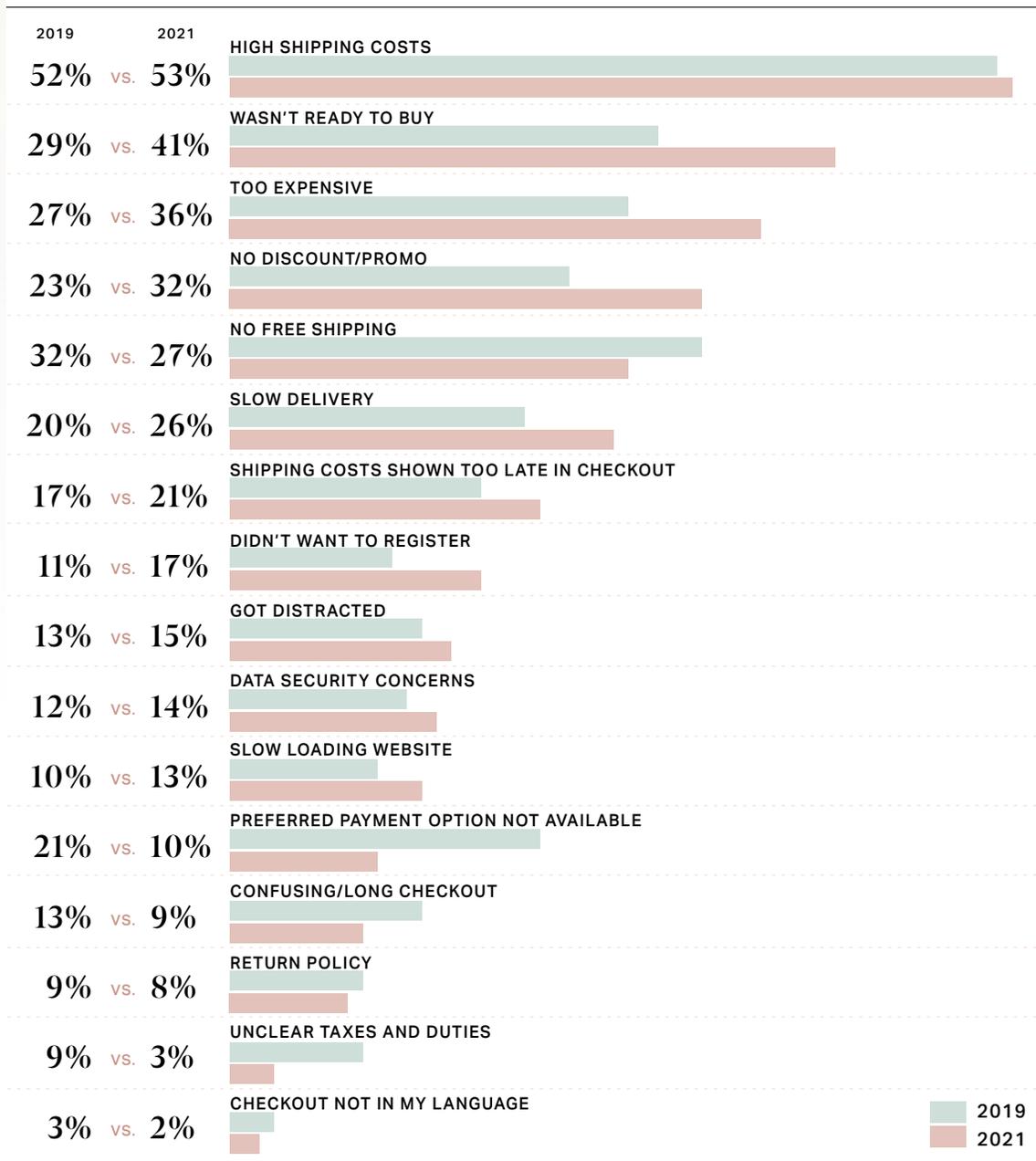
Source: Flow Commerce E-Commerce Survey, 2021 (N=294), French Apparel Shoppers A18-54, % shows “Very Important”

Shopping Cart Abandonment Patterns

When prompted about shopping cart abandonment rates, 90% of French shoppers said they have abandoned their shopping carts. This is a higher rate than shopping cart abandonment patterns in 2019 (84%). Their primary reasons for abandoning shopping carts ranged from high shipping costs (53%) and the products are too expensive (36%) to the lack of discounts and promotions (32%) and no free shipping (27%) and slow delivery (26%).

In terms of trends, concerns regarding product price, lack of discount/promotion and slow product delivery increased significantly vs. 2019 (+9pt, +9pt and +6pt), while high shipping costs remained the top barrier in line with results in 2019.

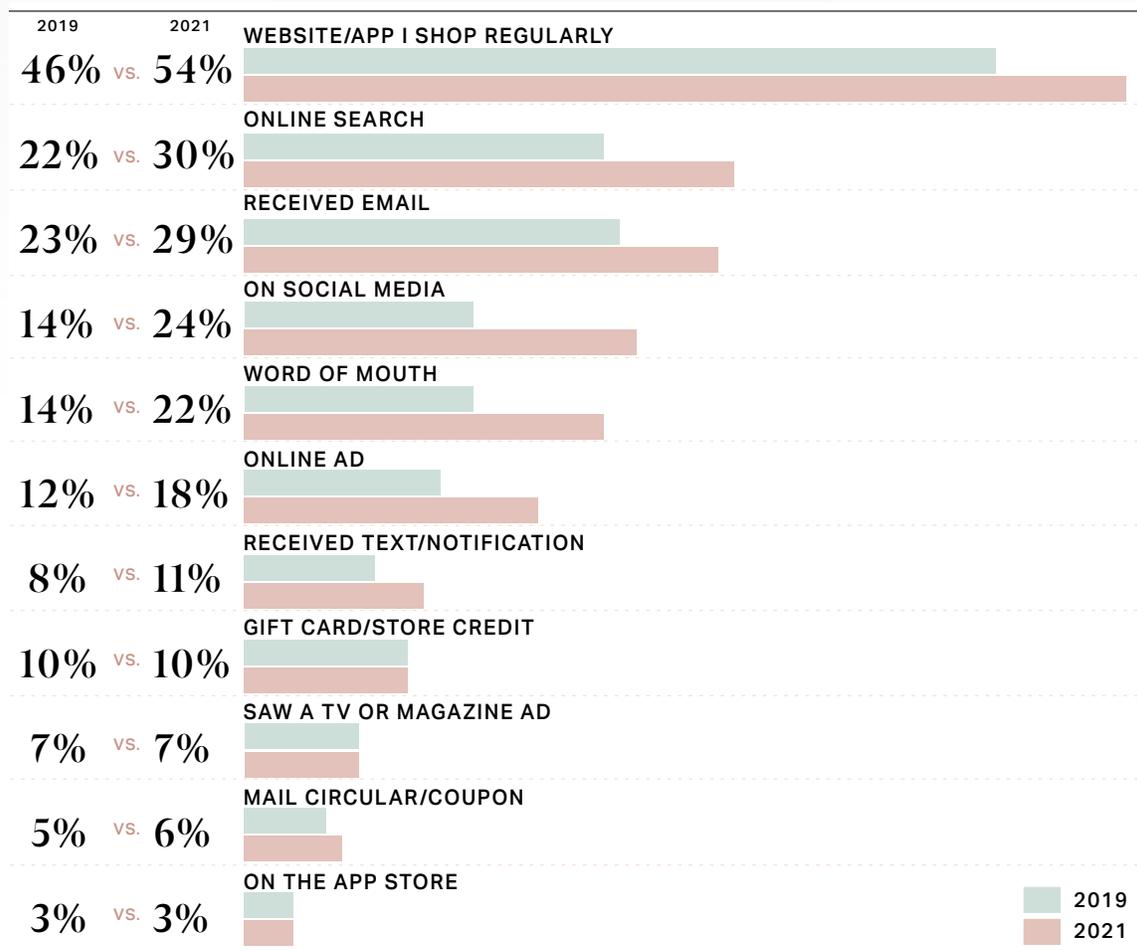




Flow Commerce E-Commerce Survey, 2019 (N=325), 2021 (N=266), French Apparel Shoppers A18-54 who abandoned their shopping cart

Marketing Channels

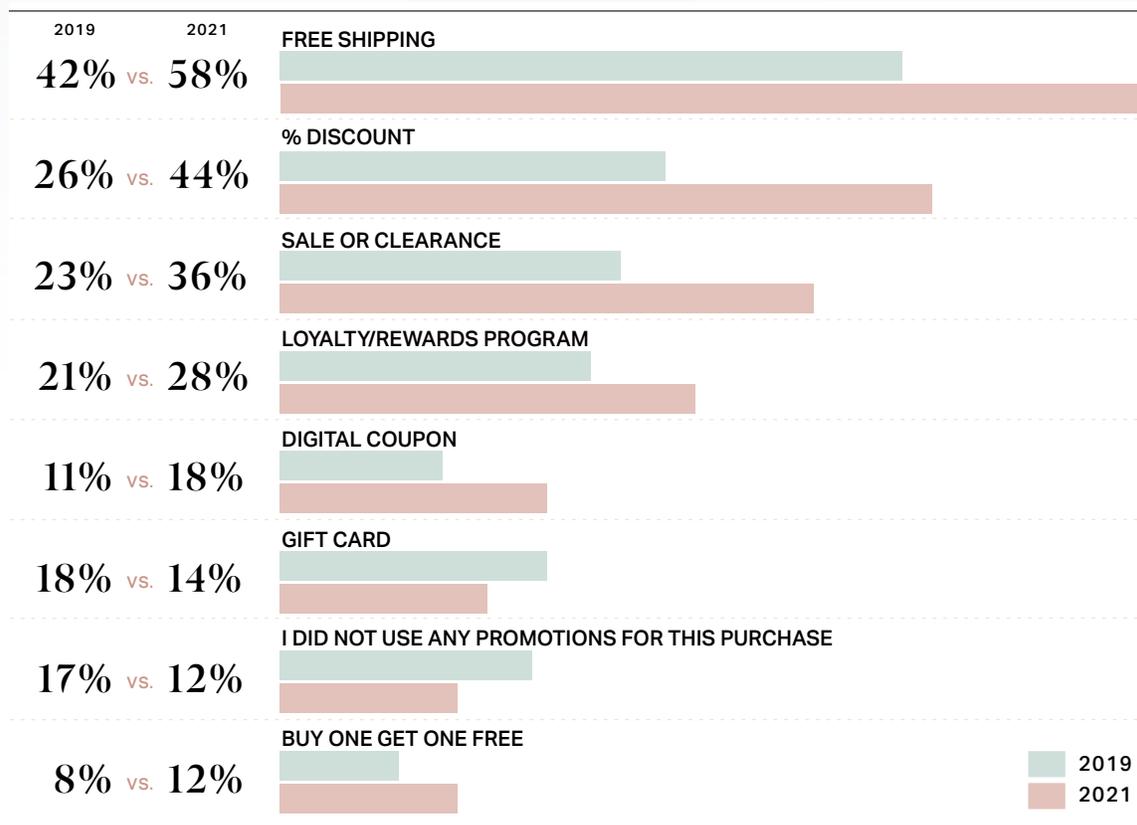
Online search, email, and social media ranked as the top 3 digital channels driving retail visits among French shoppers, similar to results in 2019. In terms of demographic skews, Men were more likely to rely on online search (36% vs 26% for Women), whereas Women relied more heavily on email and social media (33% and 28% vs 22% and 16% for Men). Similarly, word-of-mouth and social media were most influential among ages 18-24 versus other age groups, especially ages 45-54.



Source: Flow Commerce E-Commerce Survey, 2019 (N=385), 2021 (N=294), French Apparel Shoppers A18-54

Onsite Promotions

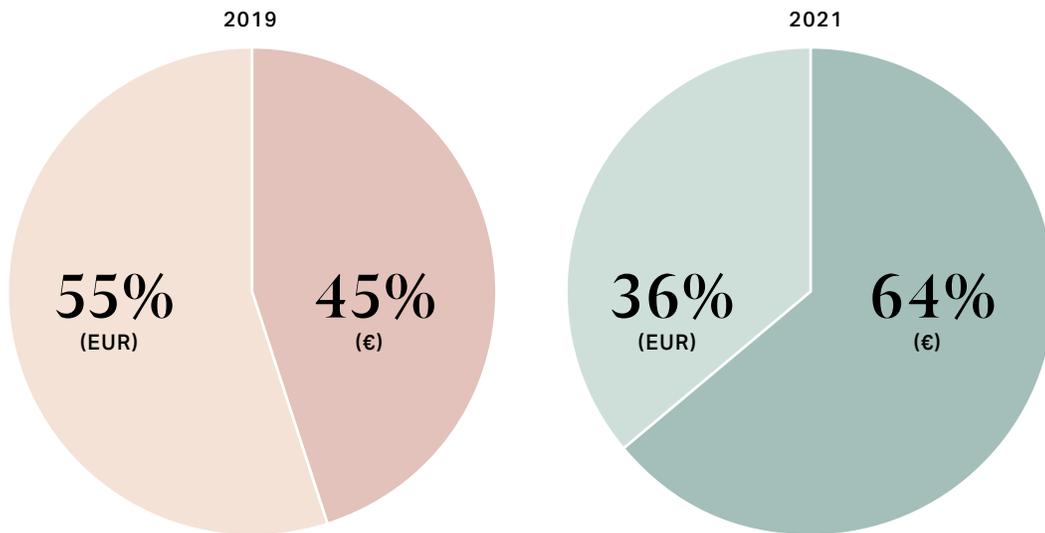
Looking at onsite promotions, over half of French shoppers (58%) mentioned using free shipping while shopping online, a notable increase of 16pts vs. 2019. Many also reported taking advantage of discounts (44%), sales and clearance offers (36%) and loyalty and rewards programs (28%), trending positively compared to 2019. On the flip side, gift cards and Buy one get one free offers ranked last with 14% and 12% of shoppers using them respectively.



Source: Flow Commerce E-Commerce Survey, 2019 (N=385), 2021 (N=294), French Apparel Shoppers A18-54

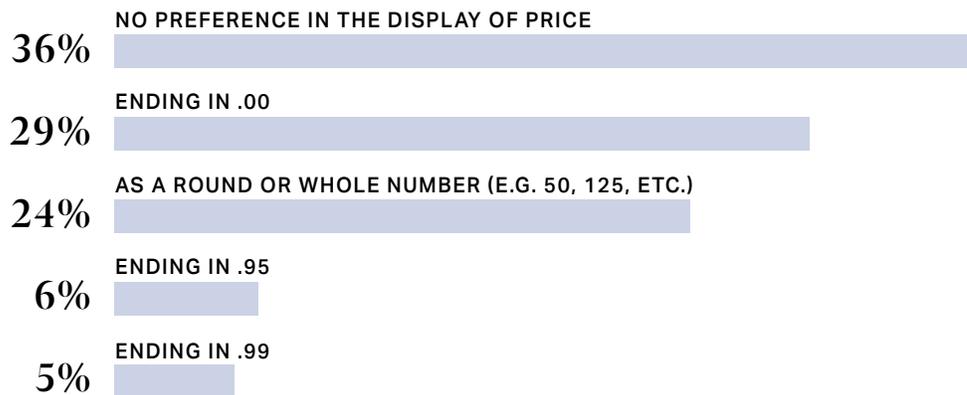
Local Currency Display and Price Rounding

We asked French shoppers about checkout preferences, including currency display. The majority of French shoppers (64%) said they preferred their currency written out as symbol (€) versus written out (EUR). This preference was significantly higher than 2019 (+19pts).



Source: Flow Commerce E-Commerce Survey, 2019 (N=385), 2021 (N=294), French Apparel Shoppers A18-54

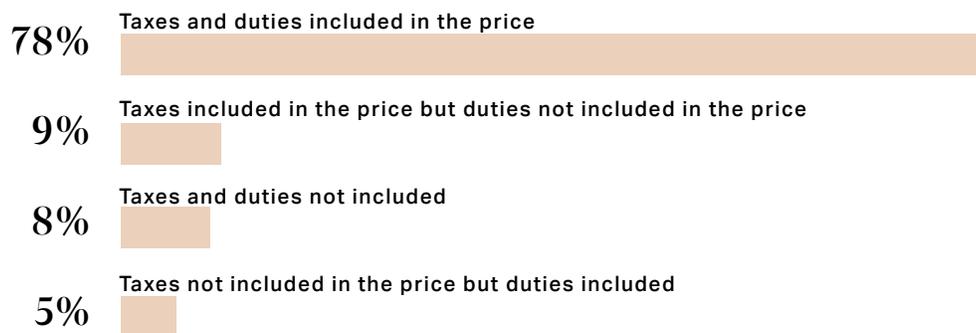
In terms of the display of pricing configuration, while one-third of French shoppers expressed no preference (36%), many mentioned they preferred prices ending in 0.00 (29%) or as a whole number without any decimal (24%).



Source: Flow Commerce E-Commerce Survey, 2021 (N=294), French Apparel Shoppers A18-54

Duties and Taxes Display

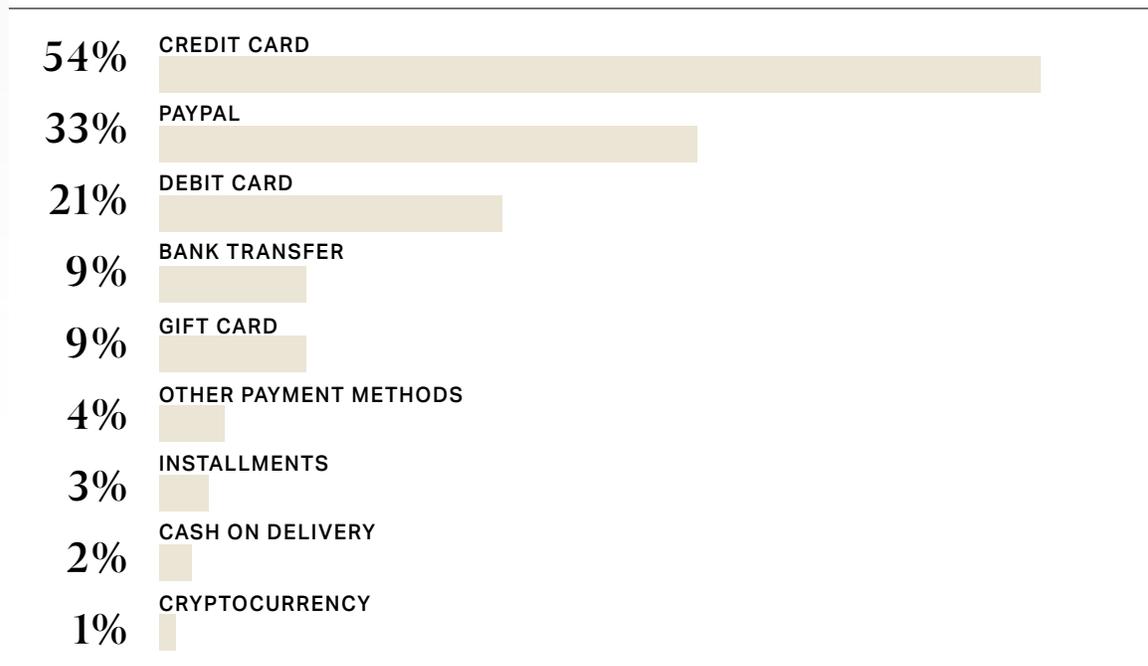
In terms of taxes and duties, three-in-four French shoppers favored having both included in the final price (78%). This is similar to the findings from 2019.



Source: Flow Commerce E-Commerce Survey, 2021 (N=294), French Apparel Shoppers A18-54

Preferred Payment Methods

Overall, preference for credit cards among French shoppers increased significantly vs. 2019 results (+22pts), while other methods stayed consistent. After credit cards, PayPal and debit cards rounded out the top 3 preferred payment methods (33% and 21% respectively), similar to 2019. Fewer than 10% stated using bank transfer, gift cards, installments or cash on delivery.

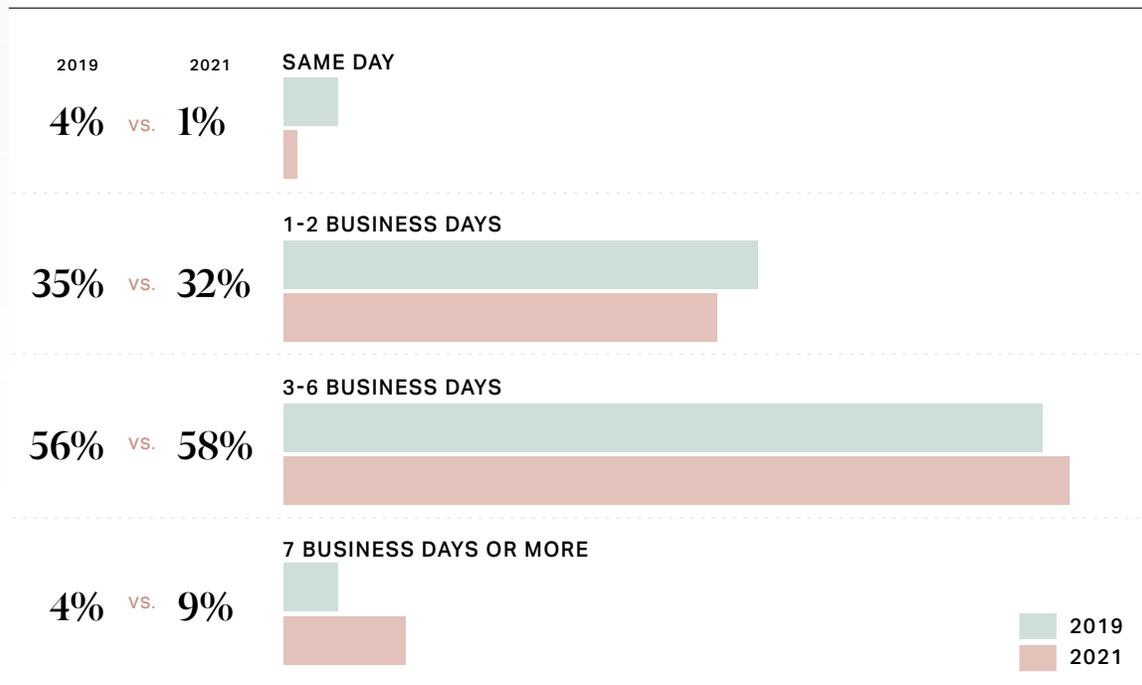


Source: Flow Commerce E-Commerce Survey, 2021 (N=294), French Apparel Shoppers A18-54

Across demographics, there were no significant differences by gender and household income. However, looking at age, ages 45-54 showed a lower preference for credit cards than younger age groups (39% versus 59% for A18-44).

Shipping Expectations

When asked about shipping windows for free shipping, over half of French shoppers (58%) said they expected their items to arrive within 3-6 business days, similar to 2019. About one-third (32%) of French shoppers said they expected shorter delivery windows (i.e., 1-2 business days). This finding was consistent across all demographic groups.



Source: Flow Commerce E-Commerce Survey, 2019 (N=385), 2021 (N=294), French Apparel Shoppers A18-54

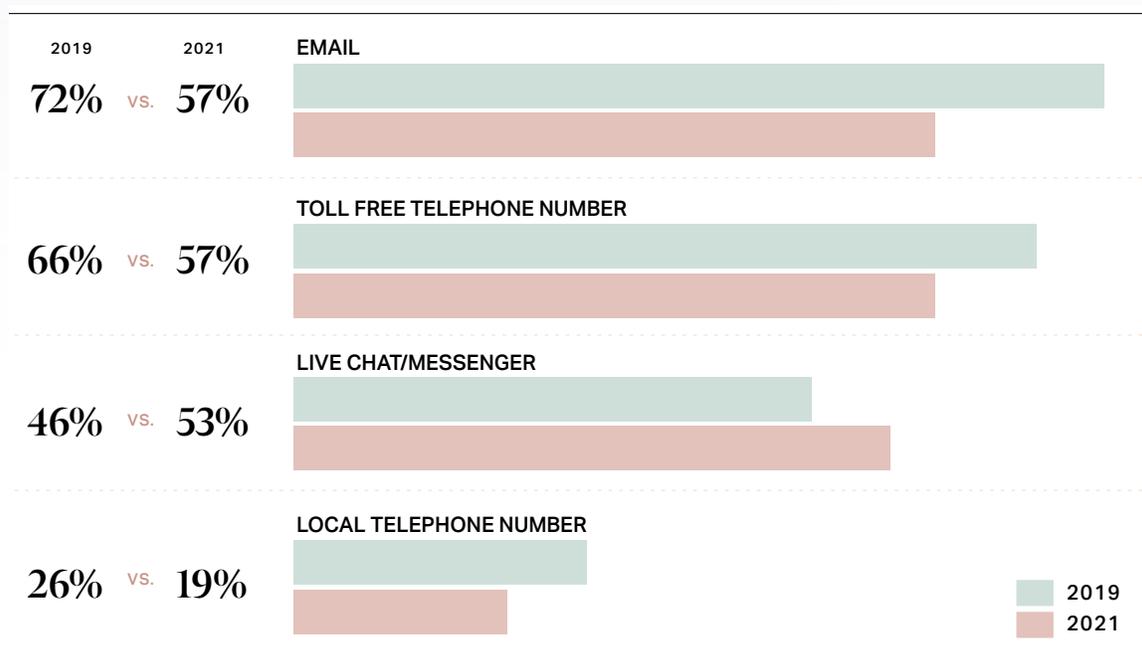
32%

of French shoppers said they expected delivery between 1-2 business days.

Customer Service Expectations

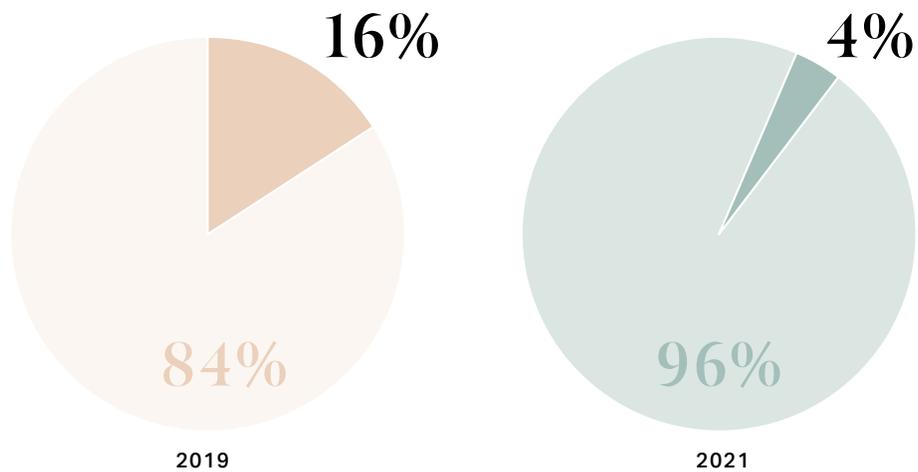
In terms of customer service, the availability of a customer service email and a toll free telephone number still prevails as the most preferred methods of contacting customer service among French shoppers (57% each). However, French shoppers showed a decreased preference toward both versus 2019 (-15pts and -9pts respectively). On the flip side, live chat and messenger increased in popularity, with 53% of French shoppers responding that it is a preferred method to reach customer service.

Despite decreasing popularity, a preference for a toll free telephone number still ranked the highest in France than any other country included in our study.



Source: Flow Commerce E-Commerce Survey, 2019 (N=385), 2021 (N=294), French Apparel Shoppers A18-54

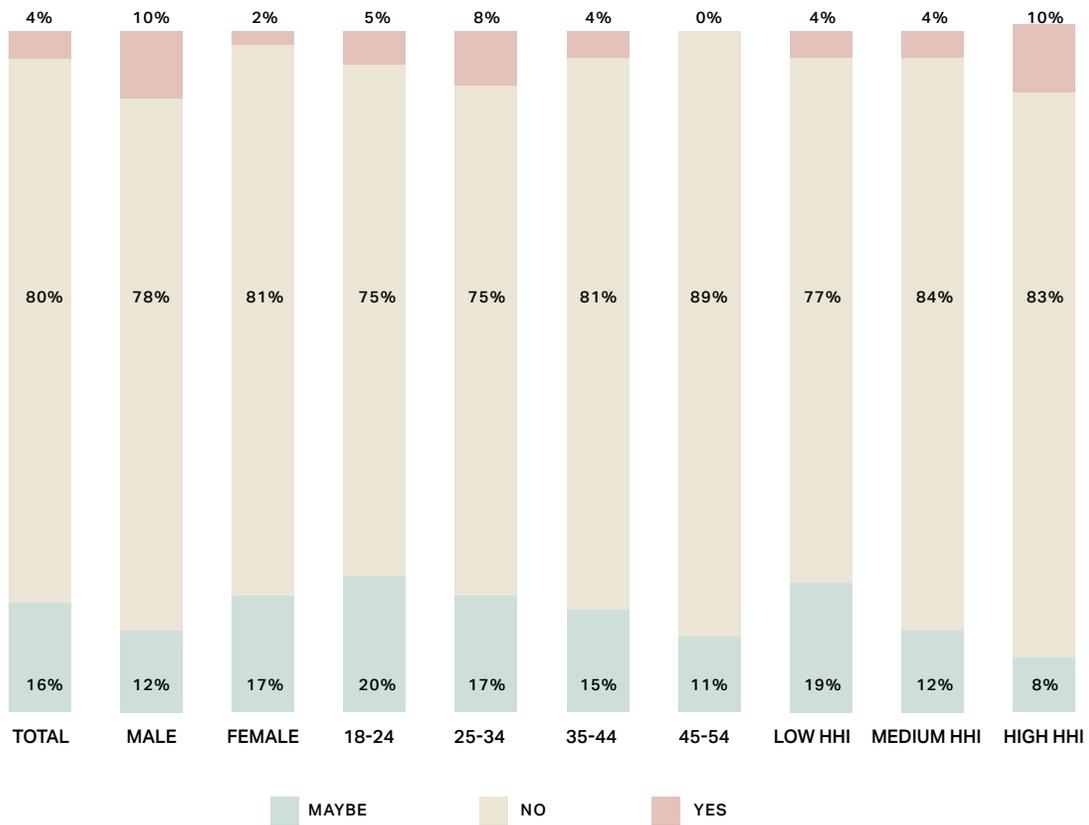
When it comes to paying for returns, very few French shoppers said they were willing to do so (4%). This is a notable decrease from results in the 2019 survey (-12pt).



Source: Flow Commerce E-Commerce Survey, 2019 (N=385), 2021 (N=294), French Apparel Shoppers A18-54

Looking across demographics, Male shoppers were significantly more likely than Female counterparts to say they would be willing to pay for returns (10% versus 2%). The same was true for households with a higher household income (€50K+), who were more likely to say they would be willing to pay for returns (10% versus 4%).





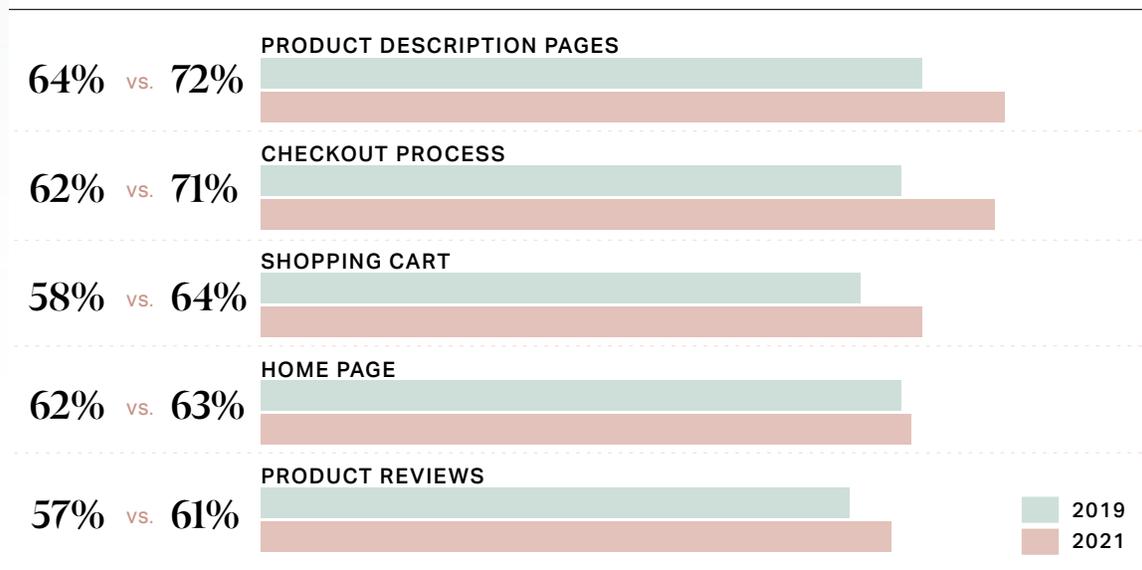
Source: Flow Commerce E-Commerce Survey, 2021 (N=294), French Apparel Shoppers A18-54



Localized Language

French shoppers also expressed a high preference for having all aspects of a retailer's website translated into French. In fact, over 2 out of 3 respondents (69%) mentioned they would be unlikely to buy from a retailer website that is not in the local language.

When prompted about specific areas of the website, French shoppers want to see all aspects of the website localized, especially product descriptions, checkout, and shopping cart. These findings were mostly consistent with the results in our 2019 survey.



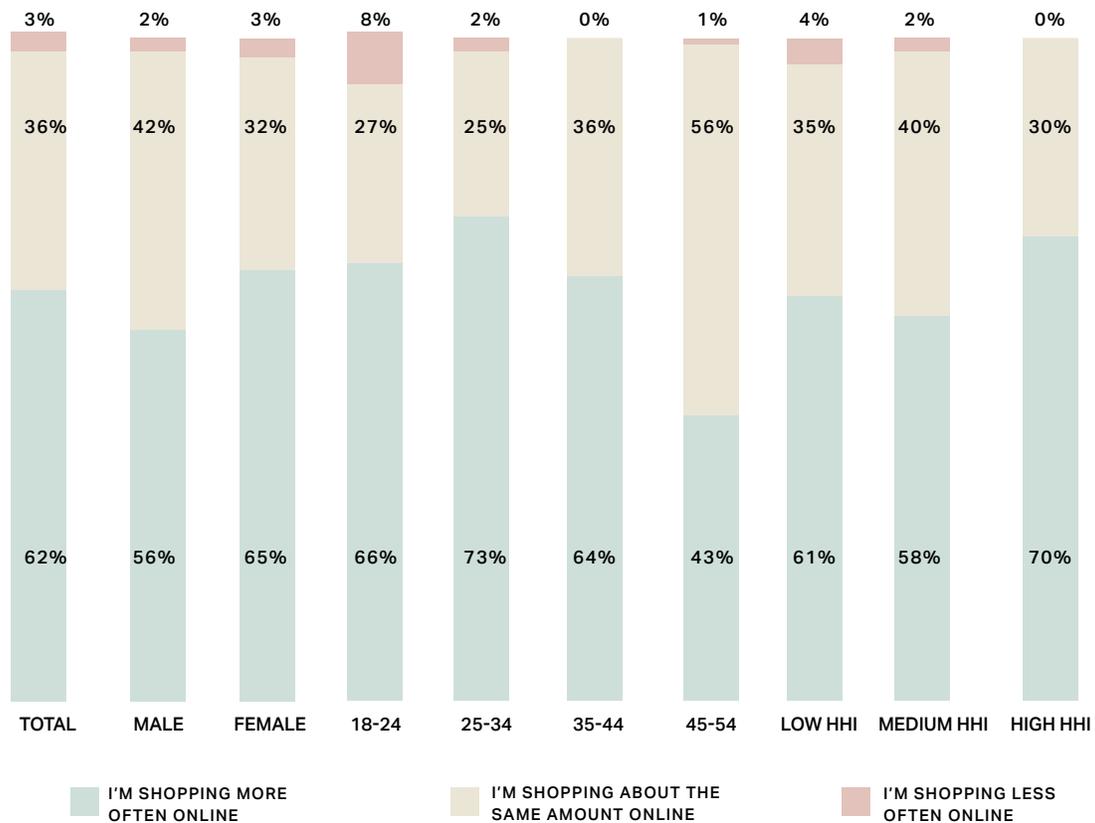
Source: Flow Commerce E-Commerce Survey, 2019 (N=385), 2021 (N=294), French Apparel Shoppers A18-54

69%

of French shoppers mentioned they would be unlikely to buy from a retailer website that is not in the local language.

Pandemic Impact and Future State

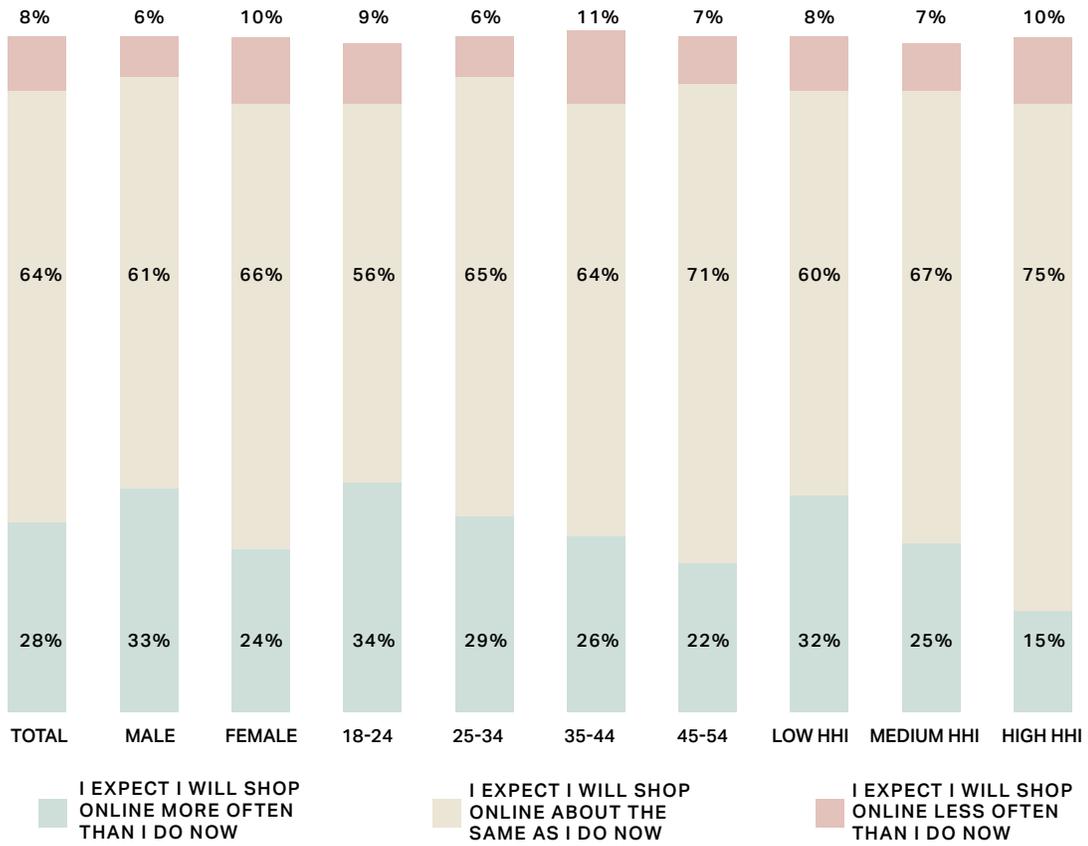
Lastly, we asked French respondents how the pandemic impacted their frequency shopping online. Overall, the majority of French shoppers said they were shopping online more often as a result of the pandemic (62%), especially ages 25-34 (73%).



SSource: Flow Commerce E-Commerce Survey, 2021 (N=294), French Apparel Shoppers A18-54

Looking ahead, we asked French shoppers how frequently they expect to shop online over the next year and most agreed they expected to shop about the same as they did now (64%).

However, across demographic groups, male shoppers were more likely than females to say they will shop more online (33% vs 24%). Similarly ages 18-24 said they would shop more online compared to other age groups, especially ages 45-54 (34% vs. 22%).



Source: Flow Commerce E-Commerce Survey, 2021 (N=294), French Apparel Shoppers A18-54



What's Next?

The results of this study reveal important implications for cross-border retailers.

The French market has distinct shopper profiles and concerns that need to be addressed in a customized fashion through website localization.

- This level of customization includes:
 - » Understanding cross-border barriers, factors influencing online shopping and cart abandonment factors.
 - » Exploring marketing channels that drive the most traffic and preferred promotions
 - » Tailoring the variables across the customer journey to match shoppers' expectations (duties and tax display, preferred local payments, shipping and customer service expectations, etc.)

Flow empowers businesses to market, sell and ship to online consumers globally, enabling consumers anywhere to have easy local shopping experiences. For more information, visit www.flow.io.

Research Methodology

- The international study included 28 questions related to consumer attitudes and behavior toward e-commerce. Each market had a total of 385 respondents, which were defined as adults 18-54 who shopped for a variety of products online in the past year.* The sample was then filtered by apparel shopping to be trended versus 2019 resulting in 294 respondents for France. All data was analyzed and reported at 95% confidence level. Survey questions covered 5 major areas:
 - » Cross-border shopping behaviors (e.g., categories, barriers, expectations, etc.)
 - » General shopping behaviors (e.g., promotions used, retailer selection, etc.)
 - » Customer service and shipping (e.g., delivery windows, free shipping, etc.)
 - » Retail website user experience and checkout preferences (e.g., currency, payment, etc.)
 - » Pandemic impact (e.g., frequency of shopping, delivery window preferences, etc.)

**Product categories purchased include: apparel, shoes, jewelry, beauty, consumer electronics, sporting-outdoor equipment, toys-hobbies, home decoration and furnishings*



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Flow's technology is the powerful solution preferred by growing brands to accelerate and optimize their global expansion and drive cross-border sales in over 200 countries worldwide. Merchants across the globe, such as MZ Wallace, Charles & Colvard, and Outerknown, trust Flow to drive increased cross-border revenue by localizing shopping experiences and optimizing conversions. Founded in 2015, Flow is based in Hoboken, NJ with a globally distributed workforce and additional offices in Dublin.

To learn more about how to boost conversions on your cross-border e-commerce website, contact us today at hello@flow.io and speak with a Flow expert.

For more information, visit www.flow.io.

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