COVID-19 and E-commerce
Findings from a survey of online consumers in 9 countries
COVID-19 AND E-COMMERCE
FINDINGS FROM A SURVEY OF ONLINE CONSUMERS IN 9 COUNTRIES

Report by Netcomm Suisse Observatory and UNCTAD

PREMIUM PARTNER
inveon

RESEARCH PARTNERS
nic.br APERTAMENTE srl
The United Nations Conference on Trade and Development

UNCTAD is the part of the United Nations Secretariat that deals with trade, investment, and development issues. Through its E-Commerce and Digital Economy Programme, UNCTAD is uniquely placed to address the cross-cutting development implications of e-commerce and digitalization.

This survey, conducted by UNCTAD and Observatory NetComm Suisse, in collaboration with NIC.br, Apertamente and Inveon, brings new evidence on how consumers in nine countries of different size, level of development and digital readiness have responded to the pandemic in terms of online shopping and other online activities.

The financial contribution by the Republic of Korea is greatly appreciated.

“*The COVID-19 pandemic has accelerated the shift towards a more digital world. Changes we make now will have lasting effects when the world economy starts to pick up again. This survey offers valuable insights that can inform our digital strategies and policies, as we turn the page from pandemic response to recovery.*”

Mukhisa Kituyi
Secretary-General of UNCTAD
A unique chance for growth in a post-COVID-19 world
Why Swiss policymakers should embrace the opportunity in e-commerce

COVID-19 has been exceptionally challenging for businesses worldwide and brought to the fore the special role of e-commerce can play in this crisis and beyond. In the post-COVID-19 world, the unparalleled growth of e-commerce businesses will, we believe, disrupt national retail frameworks and international trade fundamentals – and this in turn present unique opportunities for growth both domestically and internationally.

Recognizing the effects of COVID-19 both on our member businesses in Switzerland and on those around the world, we at Netcomm Suisse wanted to ensure that we can work together to build back our businesses in a manner that is truly beneficial to all. As such we are proud to have had the opportunity to partner with UNCTAD on this joint research project that explores the impact of the pandemic on trade, retail and e-commerce across nine emerging and developed economies.

It has been an opportunity for us to collaborate with international expertise on a hugely important project and we hope we can further build on this cooperation between our organizations in future.

Carlo Terreni
President, NetComm Suisse eCommerce Association
Dear readers,

The era of COVID-19 is one of the biggest crises – if not the biggest – in modern history and came as a huge shock for healthcare professionals, governments, businesses, and people around the world. Many countries and politicians were taking bold and strict measures for preventing the virus’ further spread and a collapse of the healthcare system. As people have to stay at home and practice social distancing, many businesses and industries are facing serious issues.

On the other hand, the spread of digital technologies and the internet allows humans to still connect and communicate – and companies are able to interact with their customers despite being physically distant.

The spread of technology further allows brands and merchants to still sell their products to their clients and maintain – at least partially – their business activities.

In this report you will find how consumers in 9 countries have embraced e-Commerce for still being able to buy their products. The report reveals that especially in countries where the share of active online shoppers was lower, people felt increasingly encouraged to order online. And in many of these markets, we can expect that consumers will remain confident in the use of digital as a purchasing channel.

Businesses that tackle this challenging period for setting up a strong digital presence with a long-term perspective will have significantly higher chances to thrive in the post-COVID-19 future.

Yomi Kastro
CEO, Inveon
info@inveon.com
OBJECTIVES
This is the first survey undertaken to examine the effect COVID-19 on the online purchasing behavior on consumers in Brazil (see next slide), China, Germany, Italy, Republic of Korea, Russian Federation, South Africa, Switzerland and Turkey.

RESEARCH METHODOLOGY
Online quantitative research
At least 200 completed questionnaires for each country from an international Panel
Total: at least 1600 completed questionnaires
Interview length: 15 minutes
Survey date: early June 2020

Responses
Total 1819 respondents
220 Italian respondents
233 South African respondents
216 German respondents
225 Turkish respondents
221 respondents from Russian Federation
227 Chinese respondents
220 respondents from Republic of Korea
257 Swiss respondents
50% Female
50% Male
METHODOLOGY: BRAZIL (1/2)

**Target population**
- Internet users 16 years old or older

**Coverage**
- National

**Sample**
- **Methodology:** Quota sample
- **Number of respondents:** 1,878

**Collection**
- Date: Between 06/23 and 07/08 2020
- Mode: CAWI and CATI

**Themes**
- Internet activities
- Culture
- E-commerce
METHODOLOGY: BRAZIL (2/2)

Calibration to population totals as March 2020 (PNAD-IBGE*)

ICT Households Survey 2019 → Weighted to March, 2020

Modeling “Internet user” + Estimation through Quasi-randomization to weight panel respondents

Weighted Panel TIC COVID-19 → Estimated reference population

(*) National Household Sample Survey - PNAD | IBGE
THE SAMPLE INCLUDES 9 COUNTRIES ACROSS ALL GLOBAL REGIONS, DIFFERING IN SIZE AND ECONOMIC DEVELOPMENT.

<table>
<thead>
<tr>
<th>Country</th>
<th>Population in millions</th>
<th>GDP per capita</th>
<th>Individuals using the internet (%)</th>
<th>Inhabitants shopping online (%)</th>
<th>B2C e-Commerce Index value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>221.00</td>
<td>8,717.20</td>
<td>68</td>
<td>24</td>
<td>57</td>
</tr>
<tr>
<td>China</td>
<td>1,397.70</td>
<td>10,216.70</td>
<td>54</td>
<td>39</td>
<td>69</td>
</tr>
<tr>
<td>Germany</td>
<td>83.10</td>
<td>46,258.90</td>
<td>92</td>
<td>75</td>
<td>93</td>
</tr>
<tr>
<td>Italy</td>
<td>60.30</td>
<td>33,189.60</td>
<td>74</td>
<td>35</td>
<td>82</td>
</tr>
<tr>
<td>Russian Federation</td>
<td>144.40</td>
<td>11,585.00</td>
<td>81</td>
<td>26</td>
<td>78</td>
</tr>
<tr>
<td>Republic of Korea</td>
<td>51.70</td>
<td>31,762.00</td>
<td>96</td>
<td>54</td>
<td>89</td>
</tr>
<tr>
<td>South Africa</td>
<td>58.60</td>
<td>6,001.40</td>
<td>56</td>
<td>8</td>
<td>54</td>
</tr>
<tr>
<td>Switzerland</td>
<td>8.60</td>
<td>81,993.70</td>
<td>94</td>
<td>63</td>
<td>96</td>
</tr>
<tr>
<td>Turkey</td>
<td>83.40</td>
<td>9,042.50</td>
<td>74</td>
<td>25</td>
<td>74</td>
</tr>
</tbody>
</table>

Note: all data refer to 2019.

Sources: ITU, UNCTAD, World Bank.
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EXECUTIVE SUMMARY
EXECUTIVE SUMMARY (1/3)

- This survey examines the effects of COVID-19 on consumer behavior for the use of digital technologies and e-commerce in 9 countries representing both emerging and developed economies. In the years before COVID-19, developed countries usually have shown a higher share of active online shoppers as internet access is available at a broad scale. The survey allows for a direct comparison of the online consumer behavior in both types of countries and in how far digital technologies can support economic growth in emerging economies. This cross-country survey represents the first of its kind.

- Over the first half of 2020, COVID-19 evolved into a global pandemic affecting people’s daily lives all over the world. For the first time, digital technologies offered an alternative channel for maintaining business activities, social interactions and consumption in times of strict preventive measures such as lockdowns.

- The majority of participants from China, Turkey and the Republic of Korea declared to have been shopping online more often since the outbreak of COVID-19. On the other hand, much fewer consumers in the developed economies of Germany and Switzerland increased their online purchasing activities. Economies with a smaller share of active online shoppers before COVID-19 are more likely to see a stronger increase in online shopping activities.

- Across the countries, people with tertiary education and female consumers were the most likely to have increased their online purchases.

- The e-Commerce sectors of consumer electronics & ICT products, tools gardening & do-it-yourself, and pharma & healthcare products represent the categories with the largest growth of active users due to COVID-19 across all countries. Cosmetics & personal care and food & beverages are the categories with the most active users during the pandemic.
EXECUTIVE SUMMARY (2/3)

- Participants across all countries indicated to have lowered their average expenditures per online purchase for most of the categories. Food & beverage, books & media, and tools, gardening and DIY represent the only categories with an increase. The decline was the most pronounced for travel & tourism, consumer electronics & ICT products, and fashion & accessories.

- In terms of communication platforms, participants in Germany, Italy, Russian Federation, South Africa, Switzerland and Turkey mostly increased the use of Microsoft Teams and Zoom. The use of well-established platforms such as WhatsApp or partially Facebook Messenger remained relatively constant. In China, home-grown communication platforms dominate, led by WeChat followed by Ding Talk.

- For most of the participating countries, consumers mostly use traditional means of payments for online shopping. Chinese consumers mainly pay with mobile payments such as Alipay or WeChat Pay. Swiss consumers show a unique preference for paying against an invoice.

- The vast majority of respondents from all countries prefer home delivery of their online acquisitions. Consumers in the Russian Federation are also often picking up their orders from a retail store.

- COVID-19 had further implications on consumer decisions. Participants from emerging economies more often declared to focus harder on essential products and to postpone larger expenditures. These countries are also seeing a stronger increase in Internet use for accessing health-related information and in the use of tech devices.
EXECUTIVE SUMMARY (3/3)

- Consumers from emerging economies more often anticipate that they will shop more online in the post-COVID-19 future. In these countries, the use of the Internet for finding health-related information is also expected to increase.

- In terms of future purchasing channels, consumers in China and Turkey express a strong preference for buying more often online than in physical stores. German, Italian, Swiss and Russian consumers indicate a preference for a balanced approach between digital and physical retailing.
RESULTS

2
EFFECTS OF COVID-19 ON THE USE OF DIGITAL TECHNOLOGIES
COVID-19 HAS LED MORE PEOPLE TO GO DIGITAL IN MULTIPLE WAYS

Since the outbreak of COVID-19, …

- I browse and spend a lot of time on digital entertainment sites: 58%
- I am more frequently looking online for health-related information: 56%
- I’m spending more time reading online newspapers and magazines: 51%
- I am shopping online more often than before: 49%

Q: Please indicate how strongly you agree with the following statement. Share of respondents that agree or totally agree. Total sample N=1819; Single answer

Note: the results for Brazil are not available for this question due to methodology differences, with exception of “shopping online more”.
DURING THE COVID-19 CRISIS MANY ONLINE COMMUNICATION PLATFORMS WERE WIDELY USED; ZOOM, MS TEAMS AND HOUSEPARTY GREW MOST
(% of total responses; most used per country)

Q: What kind of apps and platforms have you used both for private and work-related messages and calls?

Total sample N=1819; Multiple answer

Note: the results for Brazil are not available for this question due to methodology differences.

<table>
<thead>
<tr>
<th>Platform</th>
<th>2019</th>
<th>Since the outbreak of COVID-19</th>
</tr>
</thead>
<tbody>
<tr>
<td>WhatsApp</td>
<td>-2</td>
<td>-1</td>
</tr>
<tr>
<td>Instagram</td>
<td>-4</td>
<td>-1</td>
</tr>
<tr>
<td>Facebook Messenger</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Skype</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Zoom</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Telegram</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>LifeSize</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Google Apps (Hangouts, Duo)</td>
<td>-1</td>
<td>0</td>
</tr>
<tr>
<td>FaceTime</td>
<td>-1</td>
<td>0</td>
</tr>
<tr>
<td>Viber</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Microsoft Teams</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Ding Talk</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Snapchat</td>
<td>-2</td>
<td>0</td>
</tr>
<tr>
<td>WeChat Work</td>
<td>-1</td>
<td>0</td>
</tr>
<tr>
<td>Tencent Conference</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>None of the above</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Houseparty</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Slack</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Telegram</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
EFFECTS OF COVID-19 ON ONLINE SHOPPING
CONSUMERS IN EMERGING ECONOMIES SAW GREATEST SHIFTS TO ONLINE SHOPPING

Since the outbreak of COVID-19, I am shopping more often online than before.

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>49%</td>
</tr>
<tr>
<td>China (N=227)</td>
<td>78%</td>
</tr>
<tr>
<td>Turkey (N=225)</td>
<td>65%</td>
</tr>
<tr>
<td>Republic of Korea (N=220)</td>
<td>58%</td>
</tr>
<tr>
<td>Brazil (N=1878)</td>
<td>55%</td>
</tr>
<tr>
<td>Italy (N=220)</td>
<td>45%</td>
</tr>
<tr>
<td>South Africa (N=233)</td>
<td>42%</td>
</tr>
<tr>
<td>Russian Federation (N=221)</td>
<td>41%</td>
</tr>
<tr>
<td>Germany (N=216)</td>
<td>32%</td>
</tr>
<tr>
<td>Switzerland (N=257)</td>
<td>30%</td>
</tr>
</tbody>
</table>

Q: Please indicate how strongly you agree with the following statement.
Share of respondents that agree or totally agree.

Single answer

Note: the results for Brazil only allow for a limited comparison with other countries due to methodology differences.
SHIFT TO E-COMMERCE MOST PRONOUNCED FOR WOMEN, HIGHLY EDUCATED CONSUMERS AND THE 25–45 YEARS OLD

Since the outbreak of COVID-19, I am shopping more often online than before.

<table>
<thead>
<tr>
<th>Total</th>
<th>49%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>46%</td>
</tr>
<tr>
<td>Female</td>
<td>51%</td>
</tr>
<tr>
<td>Tertiary education</td>
<td>58%</td>
</tr>
<tr>
<td>Non-tertiary education</td>
<td>37%</td>
</tr>
<tr>
<td>16 – 24 y/o</td>
<td>44%</td>
</tr>
<tr>
<td>25 – 34 y/o</td>
<td>56%</td>
</tr>
<tr>
<td>35 – 44 y/o</td>
<td>57%</td>
</tr>
<tr>
<td>45 - 54 y/o</td>
<td>45%</td>
</tr>
<tr>
<td>55 - 65 y/o</td>
<td>38%</td>
</tr>
</tbody>
</table>

Q: Please indicate how strongly you agree with the following statement. Total sample N=1819; Single answer

Note: the results for Brazil are not available for this question due to methodology differences.
Since the outbreak of COVID-19, I am shopping more often online than before. Measured as “I totally agree + I agree”

<table>
<thead>
<tr>
<th>Brazil (N=1878)</th>
<th>55%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tertiary</td>
<td>59%</td>
</tr>
<tr>
<td>Secondary</td>
<td>51%</td>
</tr>
<tr>
<td>Up to Elementary</td>
<td>57%</td>
</tr>
<tr>
<td>Male</td>
<td>55%</td>
</tr>
<tr>
<td>Female</td>
<td>54%</td>
</tr>
<tr>
<td>16-24</td>
<td>60%</td>
</tr>
<tr>
<td>25-34</td>
<td>54%</td>
</tr>
<tr>
<td>35-44</td>
<td>55%</td>
</tr>
<tr>
<td>45-59</td>
<td>46%</td>
</tr>
<tr>
<td>60 +</td>
<td>41%</td>
</tr>
</tbody>
</table>

Note: the results for Brazil only allow for a limited comparison with other countries due to methodology differences.
NUMBER OF ONLINE SHOPPERS INCREASED FOR MOST PRODUCTS DUE TO COVID-19

% of active online shoppers conducting at least one online purchase every 2 months.

Since the outbreak of COVID-19

- Cosmetics & Personal care (+6)
- Digital entertainment (+1)
- Agro Food and Beverages (+0)
- Fashion and accessories (+2)
- Pharmaceutical/ Health (+9)
- Media & books (both digital and physical) (+4)
- ICT/electronic goods (+10)
- Home furniture & household products (+7)
- Education and online courses (+8)
- Tools, gardening & do-it-yourself (+9)
- Tourism/Travel, e.g. hotel bookings, flight tickets, etc. (+0)

Q: Which of the following product categories have you been buying in 2019?

Total sample N=1819; Multiple answer

Note: the results for Brazil are not available for this question due to methodology differences. No data available for consumer electronics & ICT products for Switzerland due to different questionnaire design
FASHION GOODS WERE MOST OFTEN ONLINE-PURCHASED CATEGORY IN BRAZIL IN 2018; FOOD DURING COVID-19

<table>
<thead>
<tr>
<th>Product Category</th>
<th>% of active online shoppers in 2018</th>
<th>% of active online shoppers during COVID-19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fashion and accessories</td>
<td>50%</td>
<td>54%</td>
</tr>
<tr>
<td>Home furniture &amp; household products</td>
<td>47%</td>
<td>49%</td>
</tr>
<tr>
<td>Consumer electronics &amp; ICT products</td>
<td>35%</td>
<td>39%</td>
</tr>
<tr>
<td>Cosmetics &amp; personal care</td>
<td>25%</td>
<td>44%</td>
</tr>
<tr>
<td>Food and beverages</td>
<td>22%</td>
<td>31%</td>
</tr>
<tr>
<td>Travel &amp; tourism</td>
<td>17%</td>
<td>6%</td>
</tr>
<tr>
<td>Pharma/healthcare products</td>
<td>15%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Q: Which of the following product categories have you been buying in 2018?

*Note: the results for Brazil only allow for a limited comparison with other countries due to methodology differences.*

Total sample N=1878
MONTHLY AVERAGE SPENDING ONLINE HAS DROPPED DURING COVID-19; LESS FOR FOOD, MORE FOR TRAVEL

Q: How much did you spend on average for online purchases in a month in each of the following sectors?

- Agro Food and Beverages: -11%
- Pharmaceutical/ Health: -23%
- Media & books (both digital and physical): -27%
- Digital entertainment: -28%
- Education and online courses: -29%
- Cosmetics & Personal care: -32%
- Tools, gardening & do-it-yourself: -35%
- Fashion and accessories: -43%
- ICT/electronic goods: -48%
- Home furniture & household products: -53%
- Tourism/Travel, e.g. hotel bookings, flight tickets, etc.: -75%

Note: the results for Brazil are not available for this question due to methodology differences.

Total sample N=1819
Since the outbreak of COVID-19, …

- I decided to postpone larger expenditures. 62%
- I decided to spend my next holiday domestically and not to travel abroad. 60%
- I am focusing my online purchases on essential products such as food and beverage 40%

Q: Please indicate how strongly you agree with the following statement.

Share of respondents that agree or totally agree.

Total sample N=1819; Single answer

Note: the results for Brazil are not available for “holiday/travel” item due to methodology differences.
EFFECTS OF COVID-19 ON THE USE OF DIGITAL CHANNELS
CHINESE CONSUMERS MOSTLY USE THE UNIQUE MEANS OF PAYMENT WITHIN THE DOMESTIC ECOSYSTEM

Use of payment methods for online purchases during COVID-19

Q: What payment methods do you usually use for completing your online purchases?  
*Total sample N=3697; Multiple answer*

**Note:** the results for Brazil only allow for a limited comparison with other countries due to methodology differences.
HOME DELIVERY IS PREFERRED BY CONSUMERS IN ALL COUNTRIES, WITH MORE DIFFERENTIATION IN ALTERNATIVE DELIVERY OPTIONS

(% of total responses; first and second preferred option per country)

Q: What delivery options did you usually prefer for your online purchases?
Total sample N=1819; Multiple answer

Note: the results for Brazil are not available for this question due to methodology differences.
TELEVISION AND ONLINE VIDEO ADS INSPIRE ONLINE CONSUMERS THE MOST

(\% of total responses; preferred option per country)

- Television: 43\%
- Online Video advertising (e.g. YouTube): 43\%
- Google advertising (in search results): 33\%
- Banner advertising (e.g., Facebook): 28\%
- Out of home (billboard and screens on the road and in public transport): 21\%
- Newspaper: 18\%
- Radio: 12\%

Q: Which of the following advertising channels inspires you the most for your online purchases in general?

Total sample N=1819; Multiple answers

Note: the results for Brazil are not available for this question due to methodology differences.
COVID-19 IMPACT ON CONSUMER DECISIONS
MANY CONSUMERS EXPECT TO CONTINUE DIGITAL HABITS ADOPTED DURING THE COVID-19 OUTBREAK

How likely do you think you will continue …

- To focus purchases more on essential products:
  - Very likely: 18%
  - Quite likely: 37%
  - Neither unlikely nor likely: 27%
  - Unlikely: 11%
  - Very unlikely: 7%

- To shop more often online:
  - Very likely: 17%
  - Quite likely: 36%
  - Neither unlikely nor likely: 28%
  - Unlikely: 11%
  - Very unlikely: 9%

- To travel more locally:
  - Very likely: 15%
  - Quite likely: 32%
  - Neither unlikely nor likely: 32%
  - Unlikely: 12%
  - Very unlikely: 9%

- To browse and spend more time on digital entertainment sites:
  - Very likely: 13%
  - Quite likely: 29%
  - Neither unlikely nor likely: 33%
  - Unlikely: 16%
  - Very unlikely: 10%

Q: How likely do you think you will continue to adopt the habits adopted during the COVID-19 emergency outbreak at the end of this period?

Note: the results for Brazil are not available for this question due to methodology differences.

Total sample N=1819; Single answer
Q: How likely do you think it is that you will continue to adopt the habits adopted during the COVID-19 emergency outbreak after this period? Share of respondents indicating this is quite likely or very likely with respect to their online shopping behavior.

Note: the results for Brazil are not available for this question due to methodology differences.

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>53%</td>
<td>51%</td>
<td>55%</td>
</tr>
<tr>
<td>Tertiary education</td>
<td>60%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-tertiary education</td>
<td>44%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16 – 24 y/o</td>
<td>54%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25 – 34 y/o</td>
<td>57%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>35 – 44 y/o</td>
<td>58%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>45 - 54 y/o</td>
<td>49%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>55 - 65 y/o</td>
<td>41%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Total sample N=1819; Single answer*
Q: Which purchasing channel do you think will you prefer once the COVID-19 pandemic will be over? *Single answer*

<table>
<thead>
<tr>
<th>Country</th>
<th>I will only buy online</th>
<th>I will equally use online shops and physical stores</th>
<th>I will more often buy in physical stores than in online shops</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switzerland (N=257)</td>
<td>9%</td>
<td>14%</td>
<td>7%</td>
</tr>
<tr>
<td>Turkey (N=225)</td>
<td>22%</td>
<td>36%</td>
<td>22%</td>
</tr>
<tr>
<td>Republic of Korea (N=220)</td>
<td>10%</td>
<td>31%</td>
<td>13%</td>
</tr>
<tr>
<td>China (N=227)</td>
<td>11%</td>
<td>51%</td>
<td>4%</td>
</tr>
<tr>
<td>South Africa (N=233)</td>
<td>18%</td>
<td>22%</td>
<td>6%</td>
</tr>
<tr>
<td>Italy (N=220)</td>
<td>15%</td>
<td>25%</td>
<td>9%</td>
</tr>
<tr>
<td>Russian Federation (N=221)</td>
<td>10%</td>
<td>21%</td>
<td>2%</td>
</tr>
<tr>
<td>Germany (N=216)</td>
<td>10%</td>
<td>19%</td>
<td>16%</td>
</tr>
<tr>
<td>Brazil (N=1878)</td>
<td>3%</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td>Total</td>
<td>12%</td>
<td>26%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Note: The results for Brazil only allow for a limited comparison with other countries due to methodology differences.
PERCEIVED DIGITAL READINESS OF LOCAL BUSINESSES
Q: Thinking about the 12 months before the outbreak of COVID-19 in your country, do you think that small businesses and local producers have been sufficiently equipped with digital capabilities such as online shops? 

Total sample N=1819; Single answer

CONSUMERS IN CHINA AND REP. OF KOREA FIND DIGITAL CAPABILITIES OF SMALL MERCHANTS WELL DEVELOPED

Digital capabilities of small merchants and local producers before COVID-19

- Almost all small merchants were able to sell online
- There were many merchants that were selling online
- There were some small merchants that were selling online
- There were only a few small merchants that were selling online
- There were no small merchants selling online

**Note:** The results for Brazil are not available for this question due to methodology differences.
APPENDIX
Total sample N=1819
Data %
Single answer

Note: the results for Brazil are not included in the appendix.
## SAMPLE - gender distribution

*Total sample N=1819 Data % Single answer*

<table>
<thead>
<tr>
<th>Country</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>China (N=227)</td>
<td>48%</td>
<td>52%</td>
</tr>
<tr>
<td>Germany (N=216)</td>
<td>50%</td>
<td>49%</td>
</tr>
<tr>
<td>Italy (N=220)</td>
<td>51%</td>
<td>49%</td>
</tr>
<tr>
<td>Republic of Korea (220)</td>
<td>55%</td>
<td>45%</td>
</tr>
<tr>
<td>Russian Federation (N=221)</td>
<td>48%</td>
<td>52%</td>
</tr>
<tr>
<td>South Africa (N=233)</td>
<td>48%</td>
<td>52%</td>
</tr>
<tr>
<td>Switzerland (N=257)</td>
<td>47%</td>
<td>53%</td>
</tr>
<tr>
<td>Turkey (N=225)</td>
<td>48%</td>
<td>51%</td>
</tr>
</tbody>
</table>
### SAMPLE: age distribution

**Total sample N=1819**

**Data %**

**Single answer**

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Total Sample</th>
<th>China (N=227)</th>
<th>Germany (N=216)</th>
<th>Italy (N=220)</th>
<th>Republic of Korea (N=220)</th>
<th>Russia (N=221)</th>
<th>South Africa (N=233)</th>
<th>Switzerland (N=257)</th>
<th>Turkey (N=225)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 16</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16–24</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25–34</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>35–44</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>45–54</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>55–65</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>66 and older</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Turkey (N=225)**
- **Switzerland (N=257)**
- **South Africa (N=233)**
- **Russian Federation (N=221)**
- **Republic of Korea (N=220)**
- **Italy (N=220)**
- **China (N=227)**
- **Germany (N=216)**
**Total sample N=1819**
**Data %**
**Single answer**

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Total</th>
<th>China (N=227)</th>
<th>Germany (N=216)</th>
<th>Italy (N=220)</th>
<th>Republic of Korea (N=220)</th>
<th>Russian Federation (N=221)</th>
<th>South Africa (N=233)</th>
<th>Switzerland (N=257)</th>
<th>Turkey (N=225)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doctoral or equivalent level</td>
<td>2%</td>
<td>5%</td>
<td>8%</td>
<td>3%</td>
<td>7%</td>
<td>2%</td>
<td>2%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Master degree or equivalent</td>
<td>13%</td>
<td>12%</td>
<td>9%</td>
<td>17%</td>
<td>5%</td>
<td>22%</td>
<td>22%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Bachelor degree or equivalent</td>
<td>40%</td>
<td>78%</td>
<td>44%</td>
<td>45%</td>
<td>55%</td>
<td>32%</td>
<td>27%</td>
<td>23%</td>
<td>46%</td>
</tr>
<tr>
<td>Post-secondary non-tertiary education</td>
<td>18%</td>
<td>12%</td>
<td>15%</td>
<td>18%</td>
<td>9%</td>
<td>22%</td>
<td>14%</td>
<td>6%</td>
<td>13%</td>
</tr>
<tr>
<td>Upper secondary education</td>
<td>23%</td>
<td>12%</td>
<td>18%</td>
<td>17%</td>
<td>4%</td>
<td>21%</td>
<td>27%</td>
<td>22%</td>
<td>4%</td>
</tr>
<tr>
<td>Lower secondary education</td>
<td>4%</td>
<td>5%</td>
<td>8%</td>
<td>7%</td>
<td>2%</td>
<td>2%</td>
<td>20%</td>
<td>8%</td>
<td>2%</td>
</tr>
</tbody>
</table>
### SAMPLE - profession

**Total sample N=1819**

**Data %**

*Single answer*

<table>
<thead>
<tr>
<th>Profession</th>
<th>Data %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clerk / teacher</td>
<td>22%</td>
</tr>
<tr>
<td>Worker</td>
<td>17%</td>
</tr>
<tr>
<td>Manager</td>
<td>13%</td>
</tr>
<tr>
<td>Unemployed</td>
<td>9%</td>
</tr>
<tr>
<td>Freelancer</td>
<td>8%</td>
</tr>
<tr>
<td>Businessman/Entrepreneur</td>
<td>6%</td>
</tr>
<tr>
<td>Housewife</td>
<td>6%</td>
</tr>
<tr>
<td>Retired</td>
<td>6%</td>
</tr>
<tr>
<td>Farmer conductor</td>
<td>2%</td>
</tr>
<tr>
<td>Craftsman/exerciser/trader</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
</tr>
</tbody>
</table>

### By Country

- **Turkey (N=225)**
- **Switzerland (N=257)**
- **South Africa (N=233)**
- **Russian Federation (N=221)**
- **Republic of Korea (N=220)**
- **Italy (N=220)**
- **Germany (N=216)**
- **China (N=227)**
- **Germany (N=216)**
- **Russia (N=221)**
- **Italy (N=220)**
- **Korea (N=220)**
- **South Africa (N=233)**
- **Switzerland (N=257)**
- **Turkey (N=225)**
REPORT AUTHORS & PARTNERING ORGANIZATIONS
Netcomm Suisse Observatory is the research unit of the Swiss e-Commerce Association Netcomm Suisse. The Observatory's mission is to create a reliable source for market data, insights and knowledge for the Swiss e-Commerce market. Access our knowledge here: [https://observatory.netcommsuisse.ch/](https://observatory.netcommsuisse.ch/)

3 Main research activities:

**QUALITATIVE RESEARCH:**
identifying and sharing best practices on digital transformation through interviews with industry experts.

**QUANTITATIVE RESEARCH:**
gathering insights on consumer behaviour and identifying the adoption of new trends in Switzerland by conducting online surveys.

**EXECUTIVE WORKSHOP:**
facilitating the conversation among industry experts for knowledge sharing on specific topics and industries.

**Custom studies:**
Through our network, we are able to support decision-makers answering their specific questions. Together with our partners, we are able to run consumer surveys, organise focus groups, and lead through insightful advisory workshops.

Contact us for more information: [observatory@netcommsuisse.ch](mailto:observatory@netcommsuisse.ch)
United Nations Conference on Trade and Development (UNCTAD)
Programme on E-commerce and the Digital Economy (ECDE)

UNCTAD is the part of the United Nations Secretariat that deals with trade, investment, and development issues. Its goals are to maximize trade, investment and development opportunities of developing countries and assist them in their efforts to integrate into the world economy on an equitable basis.

Through its ECDE Programme, UNCTAD is uniquely placed to address the cross-cutting development implications of e-commerce and digitalization. By providing leading-edge research and analysis (Digital Economy Report), technical cooperation (eTrade Readiness Assessments), and global platforms for multi-stakeholder policy dialogues (eCommerce Week and eTrade for all) in a holistic and integrated approach, it helps to rationalize efforts to help ensure that the digital economy brings inclusive and sustainable development.
Inveon provides retail and consumer goods companies with a flexible and scalable digital commerce presence enabling sustainable growth, leading them towards the future of commerce since 2006.

**Strong & Flexible Solutions**
Built to meet all customer needs & exceed expectations

**Global Client Base**
Inveon solutions are used in 14 countries around the world: UK, Switzerland, USA, UAE. Turkey, Russia, Ukraine, Italy, Spain, France, Romania, Israel, Jordan, Morocco

**$1B in Revenue**
Annual e-commerce volume generated by companies using Inveon solutions

**Extensive Ecosystem**
All-encompassing approach through an extensive ecosystem of partnerships

**40m Shoppers**
Shoppers using Inveon solutions

**Technology and Growth Experts**
Over 130 technology and growth experts with extensive experience
In order to help companies achieve their digital potential, Inveon offers the following products and solutions:

**inCommerce**
- Omnichannel Commerce
- App-Commerce
- Order Management System (OMS)
- Marketplace Integrator

**GrowthLab**
- SEO
- UI/UX
- Growth Partnerships
- Performance Marketing
- Data Analytics

Logos of various companies such as Coca-Cola, Watsons, Samsung, Unilever, GSK, Skechers, Majestic, Chaliou, Columbia, Colin's, Yargici, Schneider Electric, and [yatas].
About NIC.br

The Brazilian Network Information Center (NIC.br) is a non-profit civil entity created in 2005 to implement the decisions and projects of the Brazilian Internet Steering Committee (CGI.br).

- Registry and maintenance of domain names under the ccTLD ”.br”
- Allocation of Autonomous System Numbers (ASN), IPv4 and IPv6 addresses
- Treatment of and the response to security incidents
- Projects to enhance the Brazilian network infrastructure
- Research, ICT-data & statistics production
- Procedures, norms and technical and operational standards for the web

ApertaMente is a member of international research associations such as ESOMAR - Corporate Membership, GreenBook - Market Research Companies and MSPA - Mistery Shopping Professional Association.

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National and international projects

ApertaMente Digital