

March 2022

Competition and Consumer Protection Commission (CCPC)

**Brexit and COVID-19: Consumer Behaviour and
awareness while shopping online**



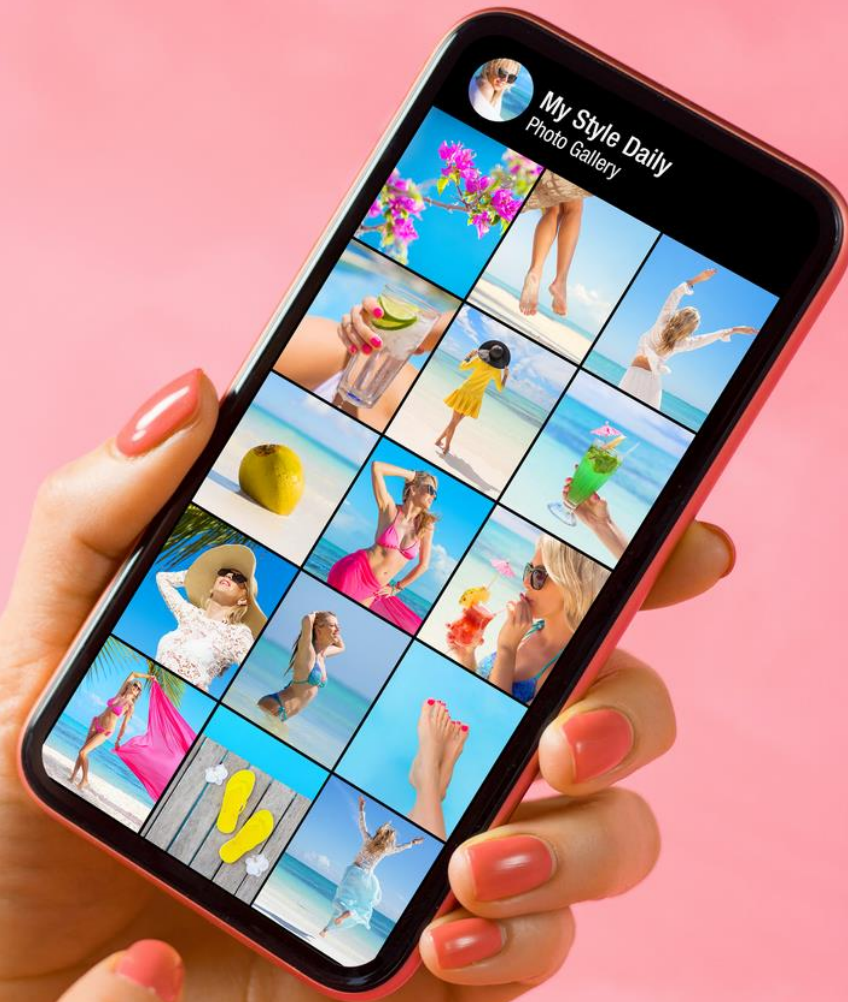
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ONLINE BEHAVIOUR RESEARCH



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Ipsos MRBI

GAME CHANGERS

INTRODUCTION

1

OBJECTIVES & METHODOLOGY



1,000 interviews conducted among adults aged 18+



Survey conducted through computer-assisted telephone (CATI) interviews, with fieldwork conducted between 21 October and 29 November 2021.



Data is then weighted in line with the most up-to-date CSO estimates of the population for age & gender, region and social class.

Objectives

To measure online consumer behaviour related to Covid-19 and Brexit, including:

- Changes in online shopping activity related to the Covid-19 pandemic
- The effect of Brexit on online shopping behaviour, including what problems Brexit has caused when buying

Where applicable, results are compared to similar previous research carried out in September 2020.

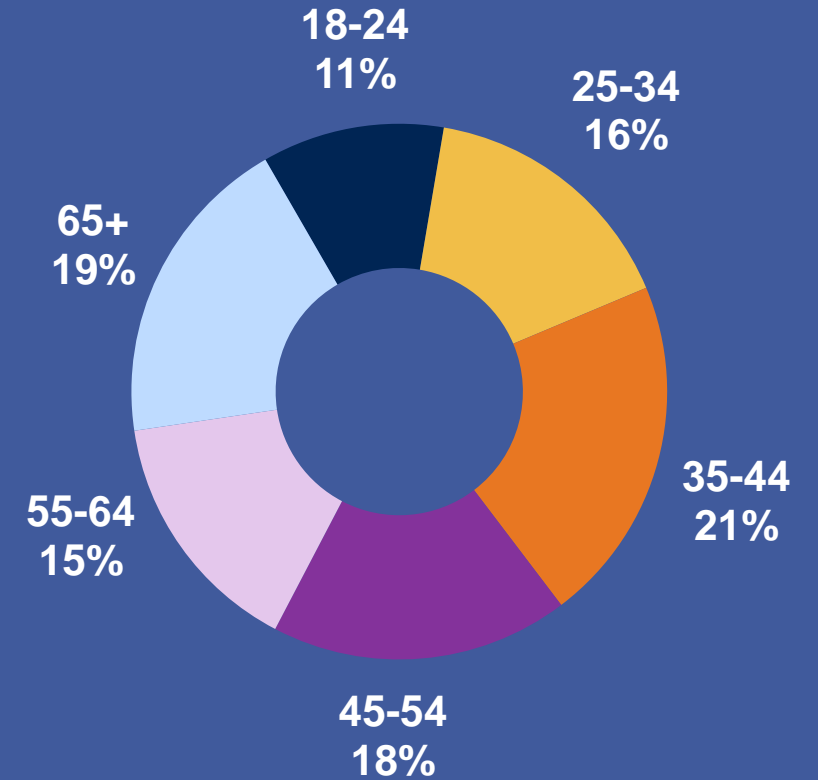
Questionnaire was designed in consultation with the Competition and Consumer Protection Commission.

SAMPLE PROFILE – DEMOGRAPHICS (WEIGHTED)

Gender



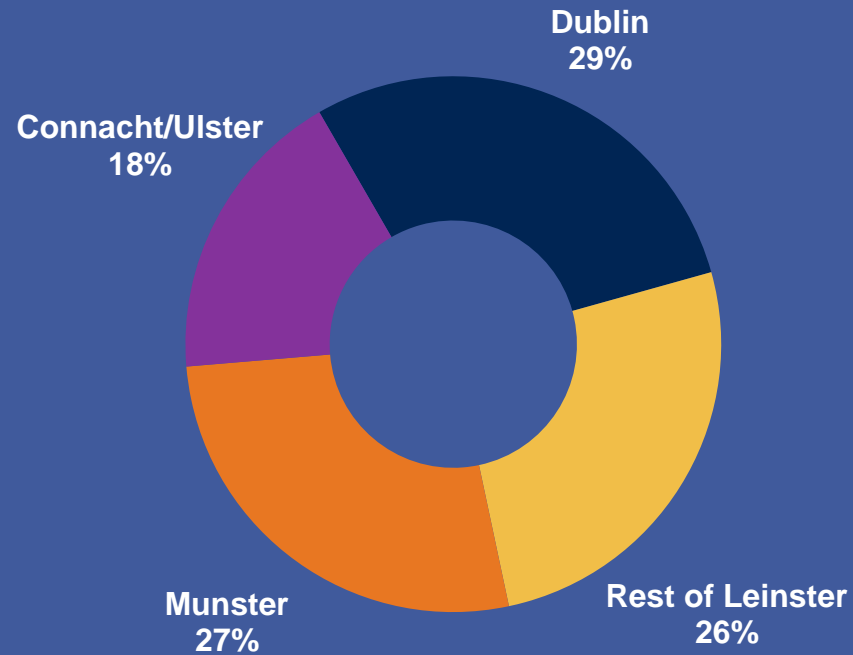
Age



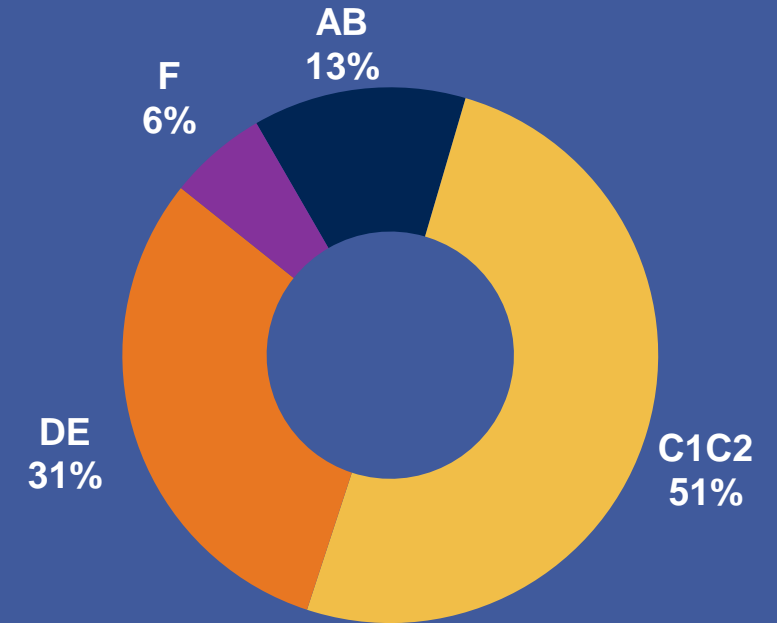
Base: All respondents (1,000)

SAMPLE PROFILE – DEMOGRAPHICS (WEIGHTED)

Region



Social Class



Base: All respondents (1,000)

EXECUTIVE SUMMARY

- **Strong growth in online shopping** during the Covid-19 pandemic. Net increase across all 7 categories measured in the survey. Essential goods such as 'food only' is the only area where growth has slowed since September 2020
- Strong decrease in online shopping from **GB-based websites post-Brexit**, with 44% of online shoppers reportedly **buying less from GB** since the end of the transition period.
- Strong growth in online shopping from **Irish and EU based websites post-Brexit**, with 44% and 28% of online shoppers respectively **buying more from these areas** since the end of the transition period.
- Nearly half (46%) of those buying online from UK report experiencing **issues post-Brexit**. Less than half of this group (44%) had their problem resolved.
- **Improved understanding of consumer rights** evident when compared to results from previous surveys in 2019 and 2020. Consumers who experienced problems when shopping online post-Brexit exhibited more knowledge about their rights.

SHOPPING IN THE CURRENT ENVIRONMENT

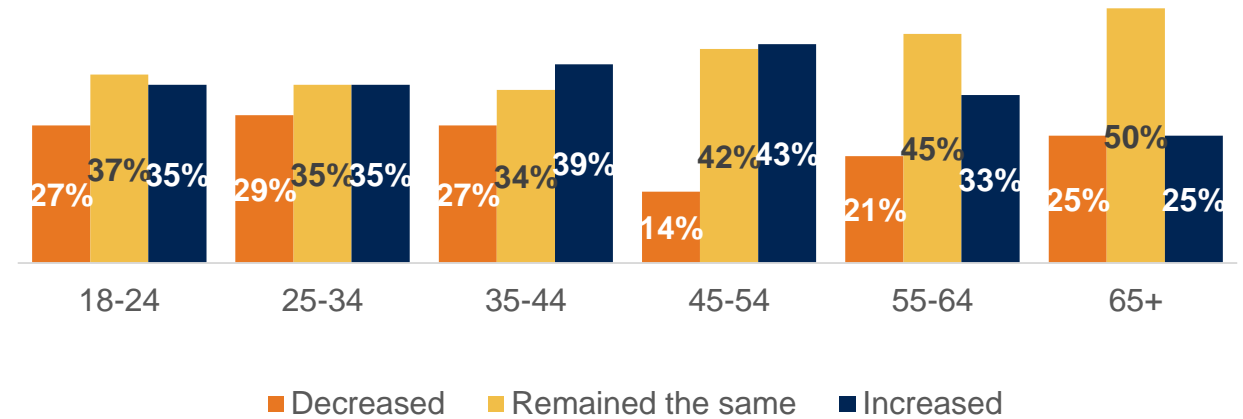
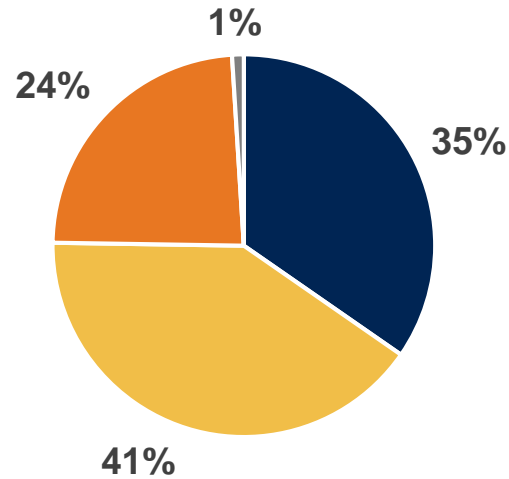
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INCREASE IN SPENDING REPORTED COMPARED TO BEFORE BEGINNING OF COVID-19 CRISIS

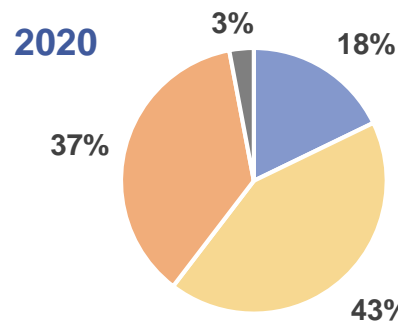
11 point net lean towards increased spending, a 30 point shift vs. September 2020

Since the beginning of the Coronavirus crisis, would you say your typical weekly expenditure has...?

Age



■ Increased ■ Remained the same ■ Decreased ■ Don't know



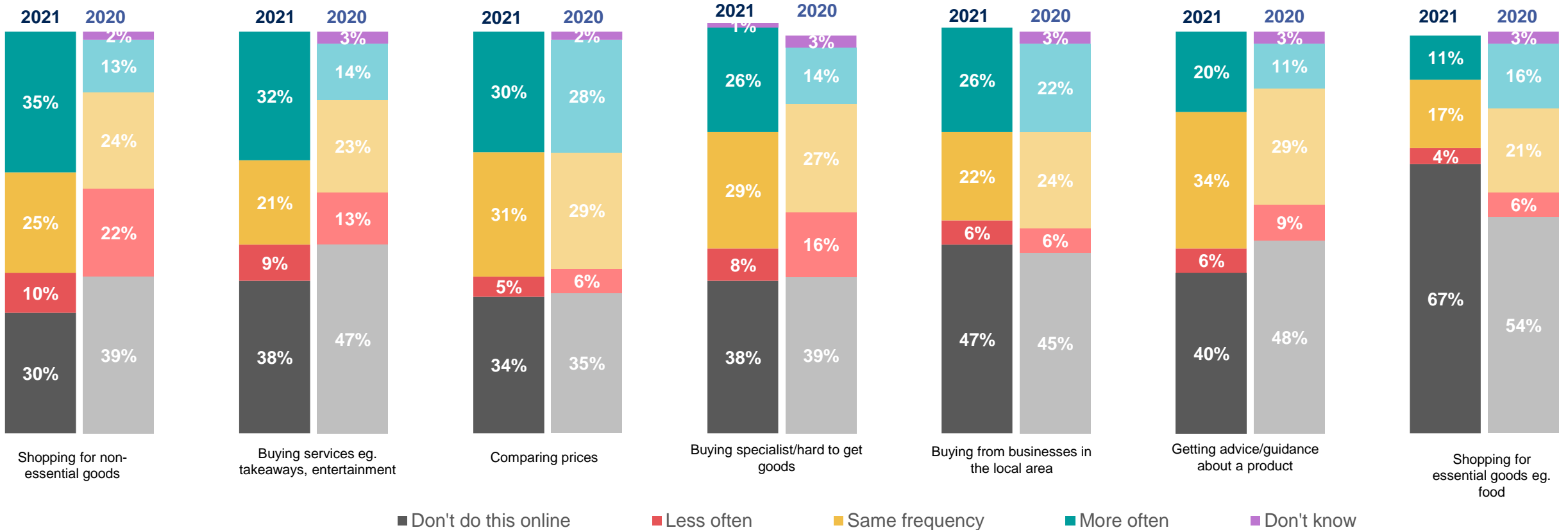
• Those aged 45-54 (43%) are most likely to report an increase in spending during Covid-19, while those aged under 45 (28%) are significantly more likely to report a decrease. All age groups, apart from those 65 and older, report their spending has increased on balance.

Q1. Since the beginning of the Coronavirus crisis, would you say your typical weekly expenditure has...?
Base: All respondents (1,000)

NET INCREASE IN ALL TYPES OF ONLINE SHOPPING ACTIVITY MENTIONED DURING COVID-19; NON-ESSENTIAL GOODS & SERVICES SEE STRONGEST GROWTH

Essential goods such as food only area where growth has slowed vs. September 2020

Thinking of online shopping, for each of the following do you do it more often, less often or at the same frequency compared to before Covid-19?



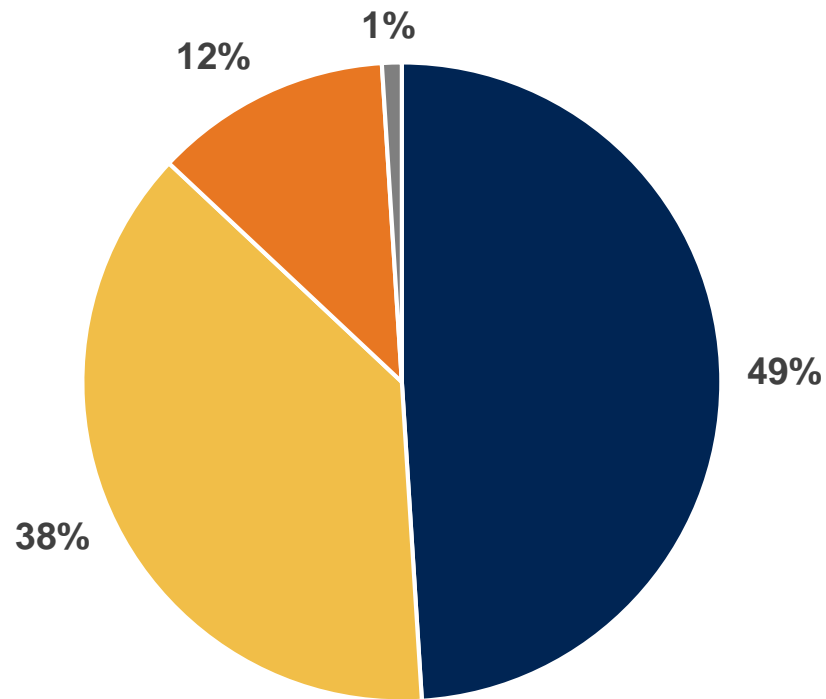
Q.2 Thinking now of online shopping, for each of the following can you tell me whether you now do it more often, less often or at the same frequency compared to before the Coronavirus crisis? If you don't shop online for a particular item, just tell me.

Base: All respondents (1,000)

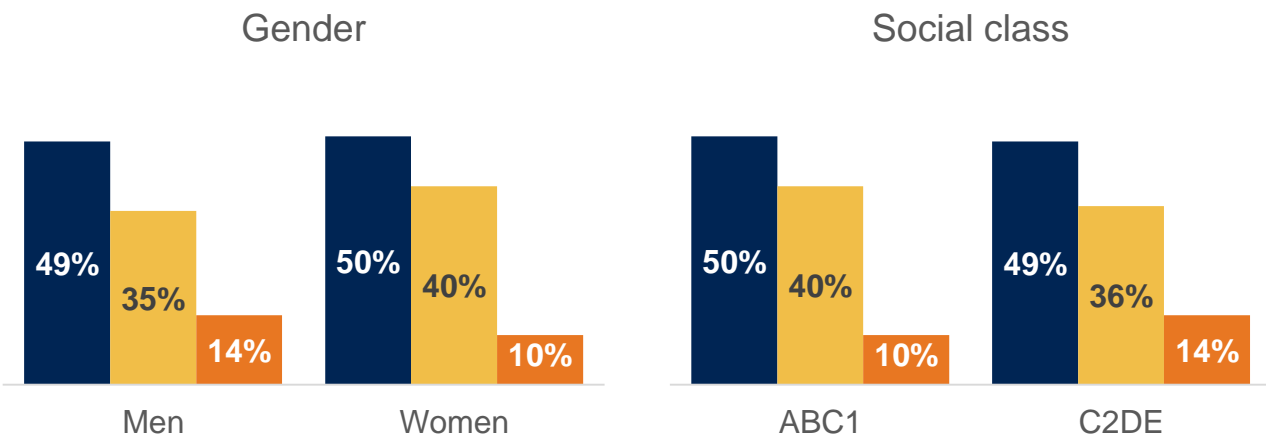
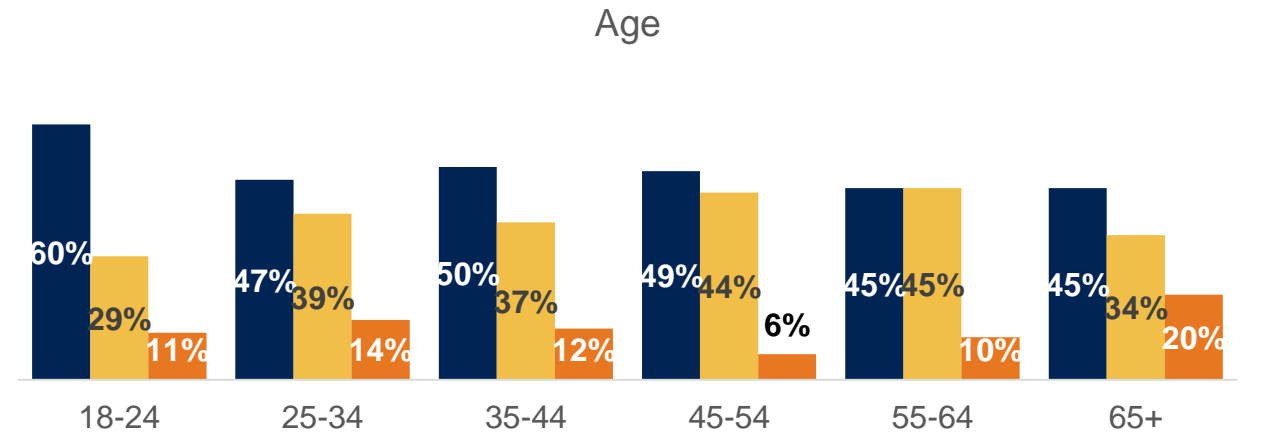
NEARLY 9 IN 10 SAY THEY WILL KEEP UP AT LEAST SOME OF THESE CHANGES IN THEIR ONLINE SHOPPING BEHAVIOUR POST-COVID-19

Those aged under 25 most likely to report they will do so

And if the Coronavirus crisis is brought to an end, will you keep up these changes?



■ Yes, some of them ■ Yes, all of them ■ No ■ Don't know



Q3. And if the Coronavirus crisis is fully brought to an end with no remaining health risks from Covid-19 do you think you will keep up these changes?
Base: All who do online shopping more/less since Coronavirus crisis (700)

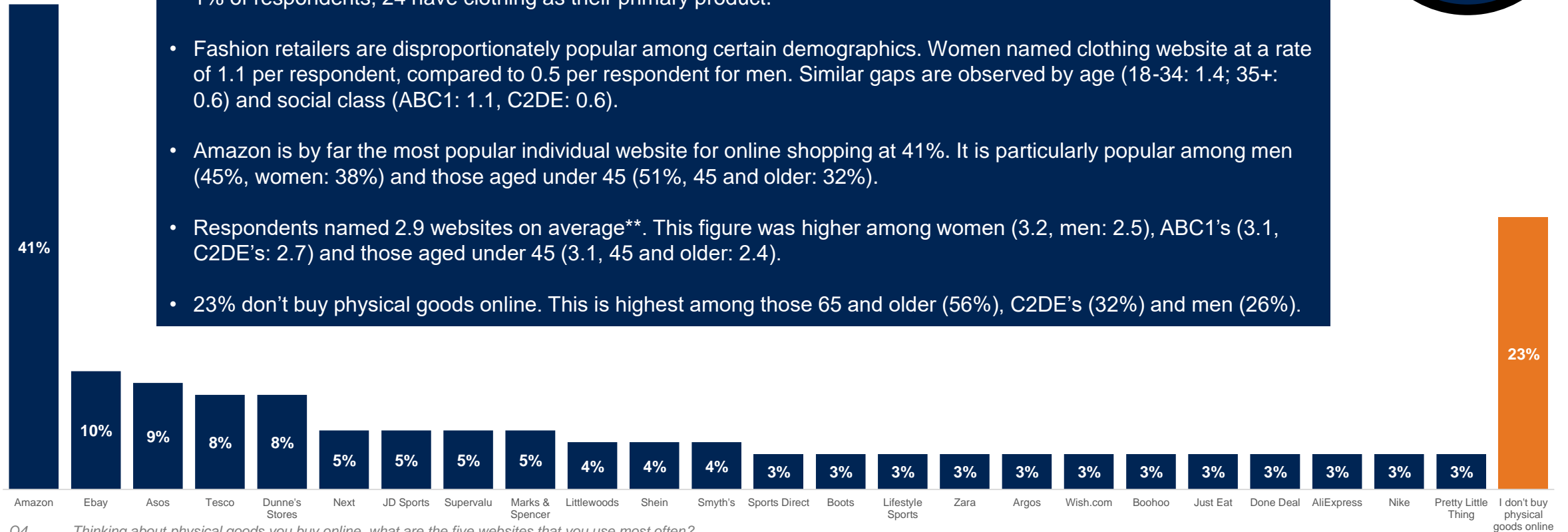
AMAZON BY FAR THE MOST COMMON WEBSITE USED FOR ONLINE SHOPPING

Clothing is the most popular product category

2.9
Average number of websites named**

What five websites do you use most often for shopping online?

- Clothing is the most popular product type for those shopping online. Of the 62 websites that were mentioned by at least 1% of respondents, 24 have clothing as their primary product.
- Fashion retailers are disproportionately popular among certain demographics. Women named clothing website at a rate of 1.1 per respondent, compared to 0.5 per respondent for men. Similar gaps are observed by age (18-34: 1.4; 35+: 0.6) and social class (ABC1: 1.1, C2DE: 0.6).
- Amazon is by far the most popular individual website for online shopping at 41%. It is particularly popular among men (45%, women: 38%) and those aged under 45 (51%, 45 and older: 32%).
- Respondents named 2.9 websites on average**. This figure was higher among women (3.2, men: 2.5), ABC1's (3.1, C2DE's: 2.7) and those aged under 45 (3.1, 45 and older: 2.4).
- 23% don't buy physical goods online. This is highest among those 65 and older (56%), C2DE's (32%) and men (26%).



Q4 Thinking about physical goods you buy online, what are the five websites that you use most often?

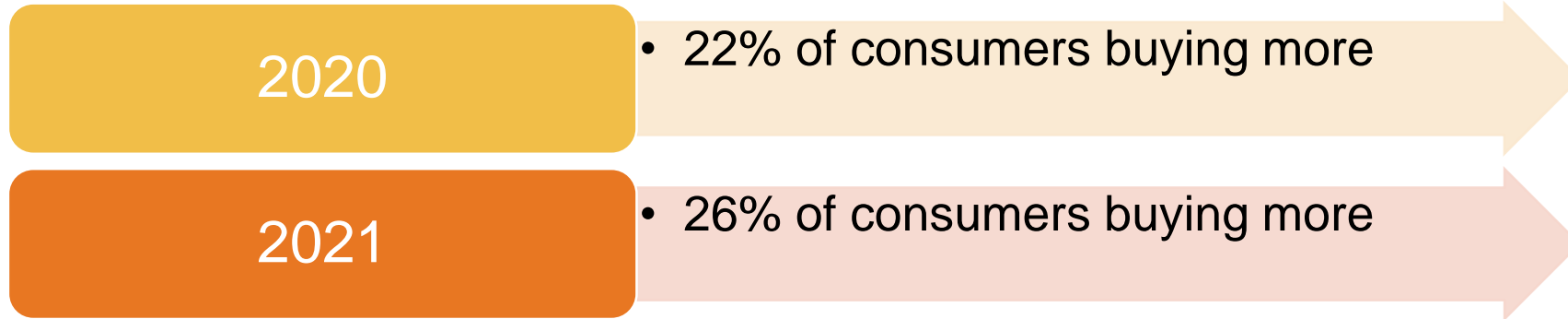
Base: All respondents (1,000)

*All others 2% or below

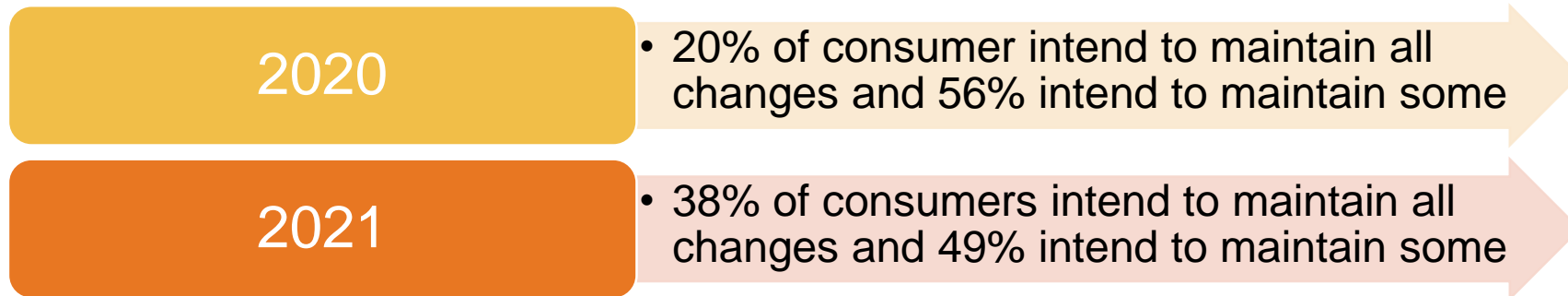
**Excluding those who don't shop online

KEY TRENDS

Online shopping from local businesses during pandemic



Online shopping post pandemic – Maintain changes



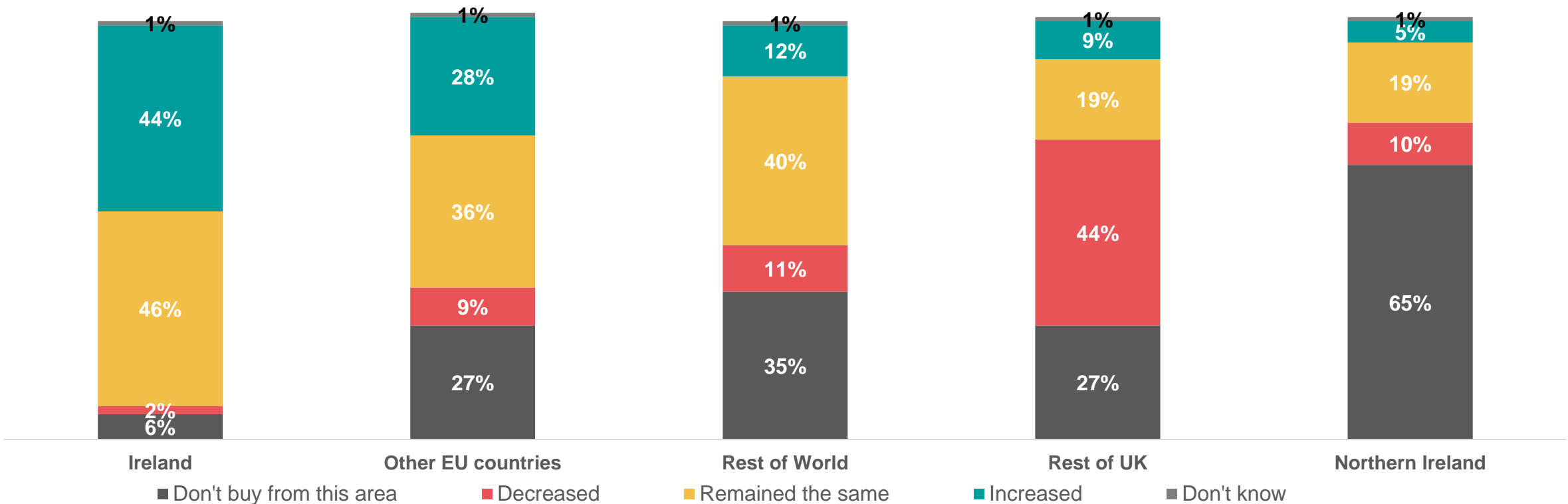
ONLINE SHOPPING AND BREXIT

3

LARGE DROP IN ONLINE SHOPPING FROM WEBSITES BASED IN GB SINCE END OF BREXIT TRANSITION PERIOD

Majority of excess demand has shifted to websites based in Ireland and other EU countries

Since the end of the Brexit transition period on Dec 31st 2020, has your online shopping increased/decreased/remained the same in these areas?

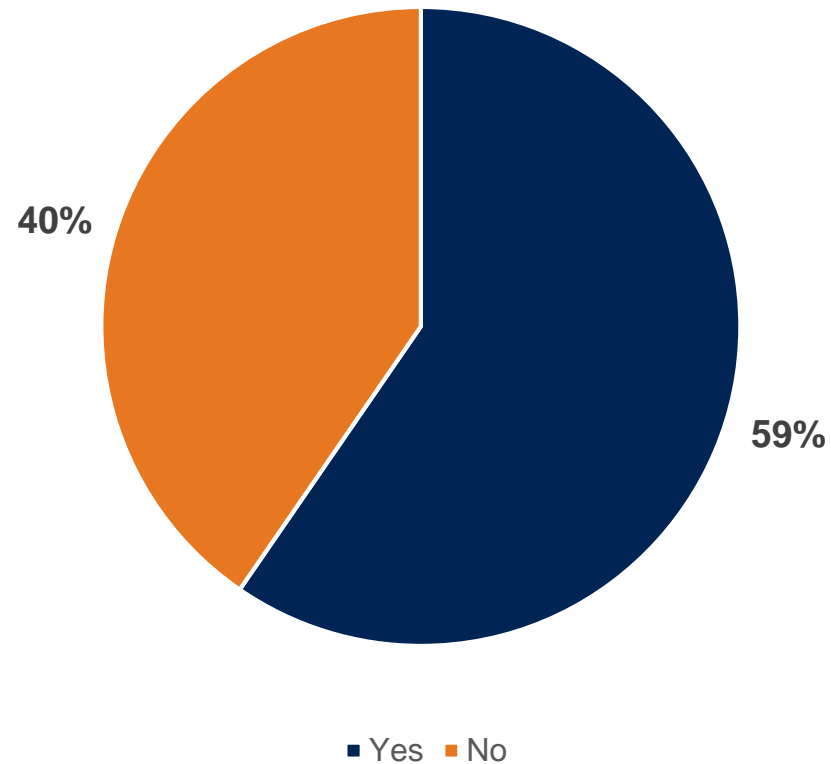


Q.5 Since the end of the Brexit transition period on the 31st of December 2020 has your online purchasing activity on websites in the following areas increased, decreased or stayed the same?
Base: All who shop online (769)

59% OF THOSE WHO HAVE NOT SHOPPED ONLINE FROM THE UK SINCE BREXIT REPORT HAVING DONE SO BEFORE BREXIT

This represents around 12% of all respondents

Before Brexit, did you purchase items online from the UK?

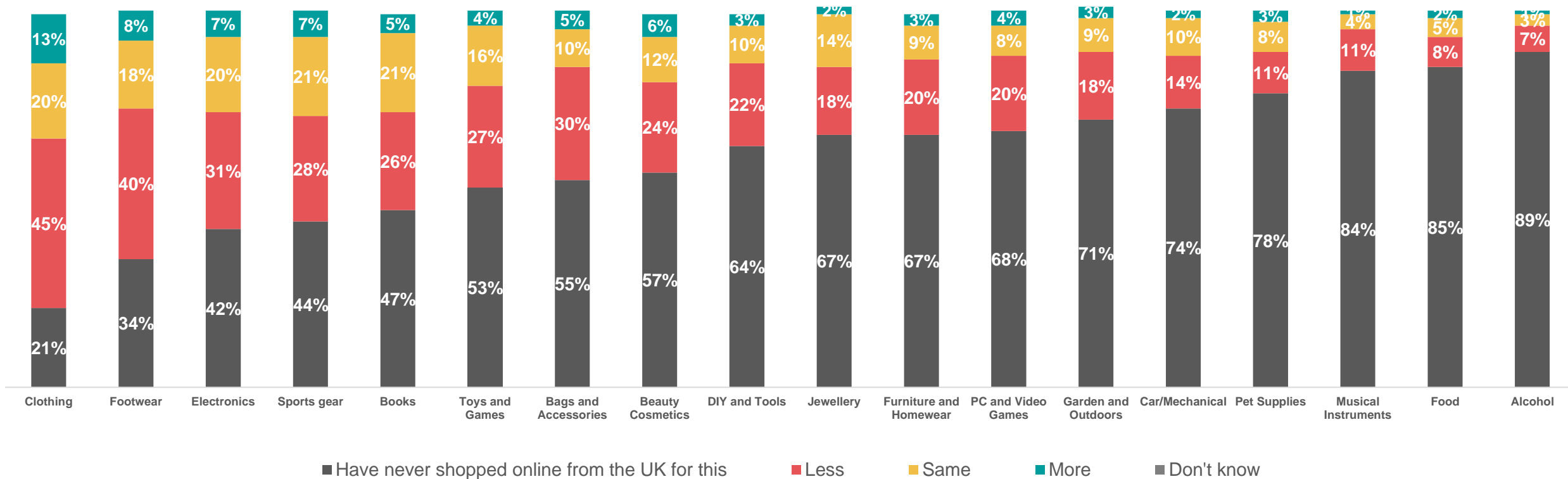


Q6. And before Brexit did you purchase items online from the UK?
Base: All who have not shopped online from the UK since Brexit (207)

NET DECREASE IN ONLINE SHOPPING FROM THE UK ACROSS ALL PRODUCT TYPES

The average decrease in shopping activity from websites based in the UK is 22%

Thinking of online shopping from the UK, for each of the following do you buy more of it, less of it or the same amount from the UK compared to before Brexit?

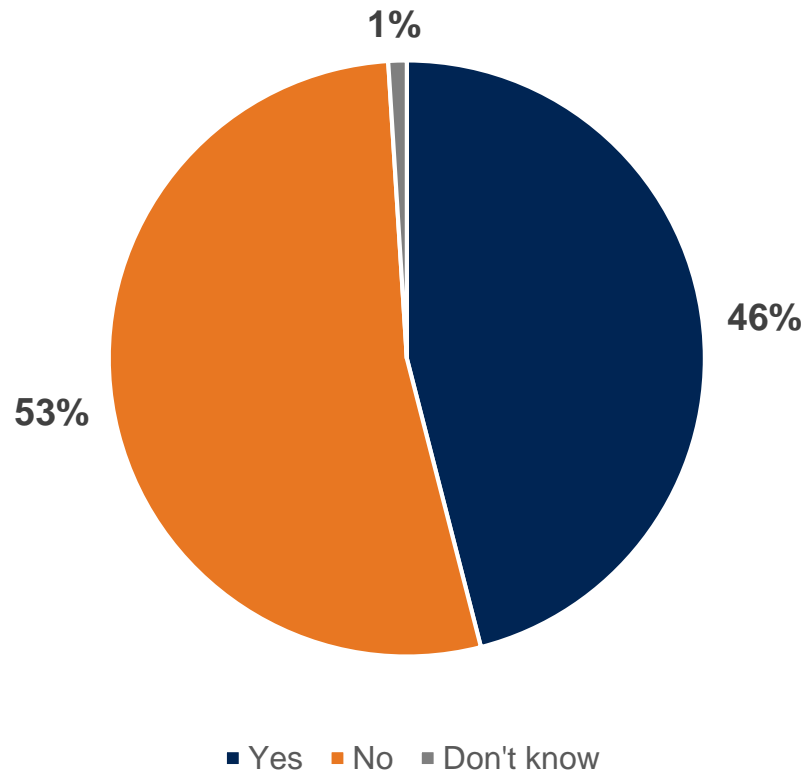


Q.7 Thinking now of online shopping from the UK, for each of the following can you tell me whether you now buy more of it, less of it or the same amount from the UK as you did before Brexit?
Base: All who shop online from the UK (680)

NEARLY HALF HAVE EXPERIENCED PROBLEMS WHEN PURCHASING FROM UK WEBSITES IN 2021

Those in social class ABC1 more likely to report having had a problem

Since the start of 2021, have you experienced any problems when purchasing physical goods from UK websites?



% responding 'Yes' by...

Age



Social Class

Region

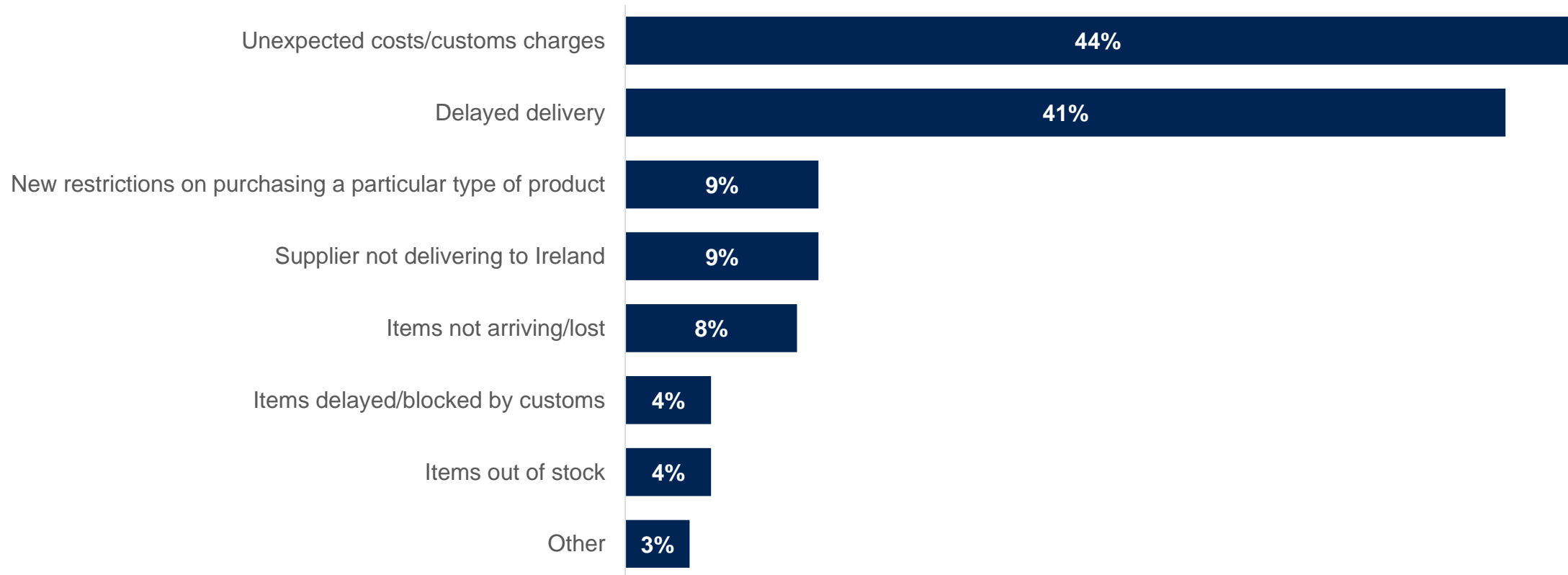


Q9. Since the start of 2021 have you experienced any problems when purchasing physical goods from UK websites?
Base: All who have bought online from UK websites since the start of 2021 (557)

UNEXPECTED COSTS/CUSTOMS CHARGES AND DELAYED DELIVERY MOST COMMON ISSUES EXPERIENCED

Delivery-related problems make up 3 of the top 5 most common issues

What was the nature of this problem?



Q10 And what was the nature of the problem?

Base: All experienced problems when buying physical goods from UK websites (257)

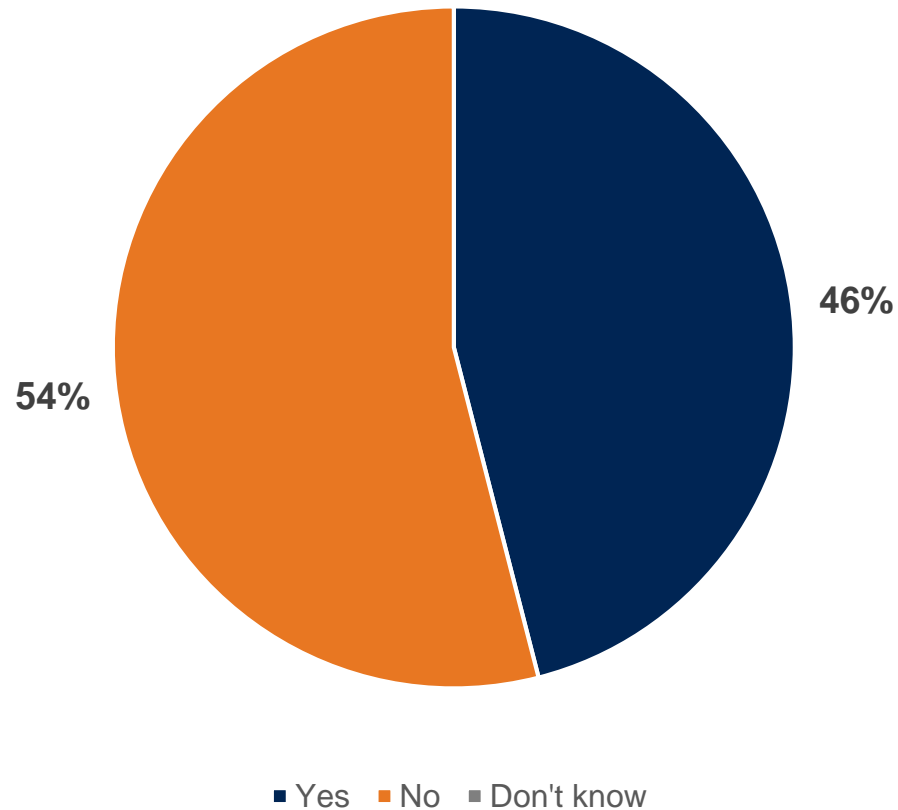
*All others 2% or less

AROUND HALF COMPLAINED TO THE SELLER IF THEY HAD A PROBLEM WHEN PURCHASING GOODS FROM THE UK

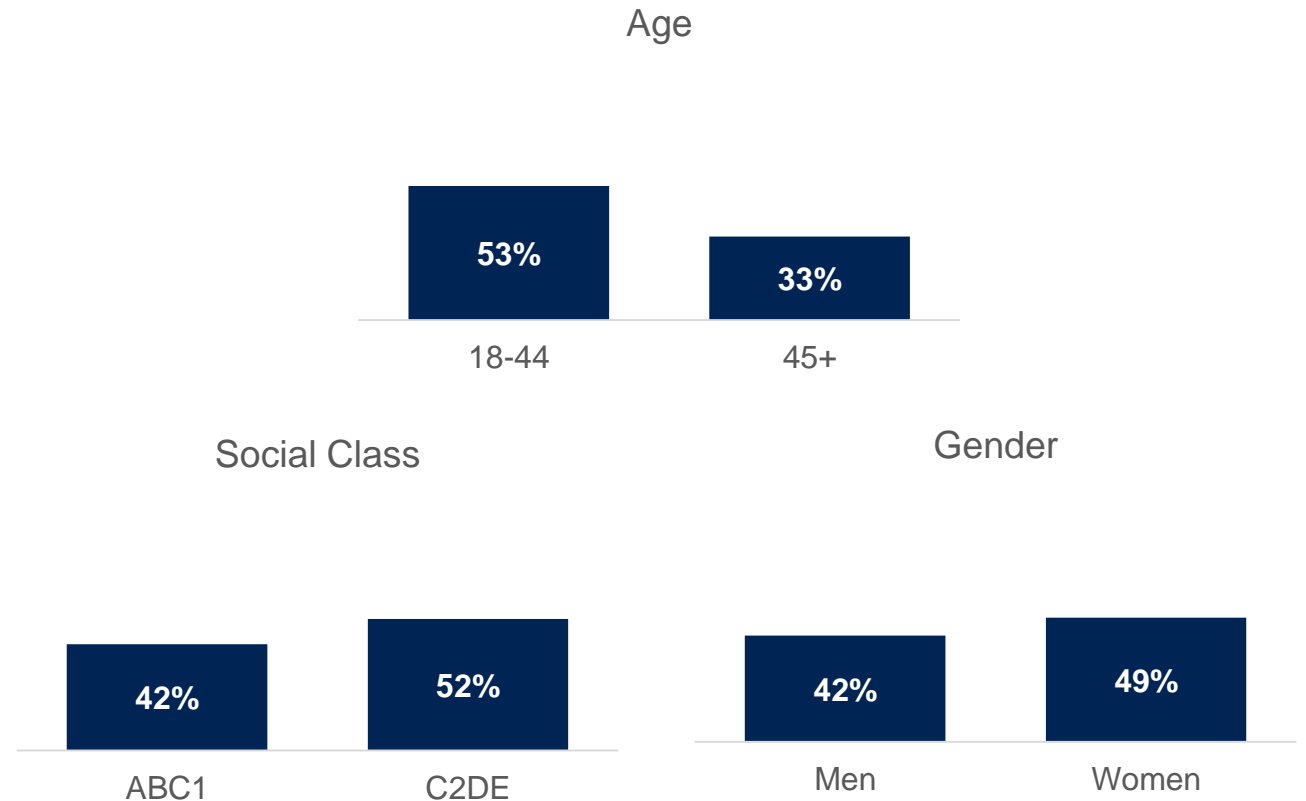
Younger people, women and C2DE's more likely to do so

Caution Small Sample Size:
C2DE (n = 94), those aged
45 and older (n = 97)

Did you complain to the seller about this problem?



% responding 'Yes' by...

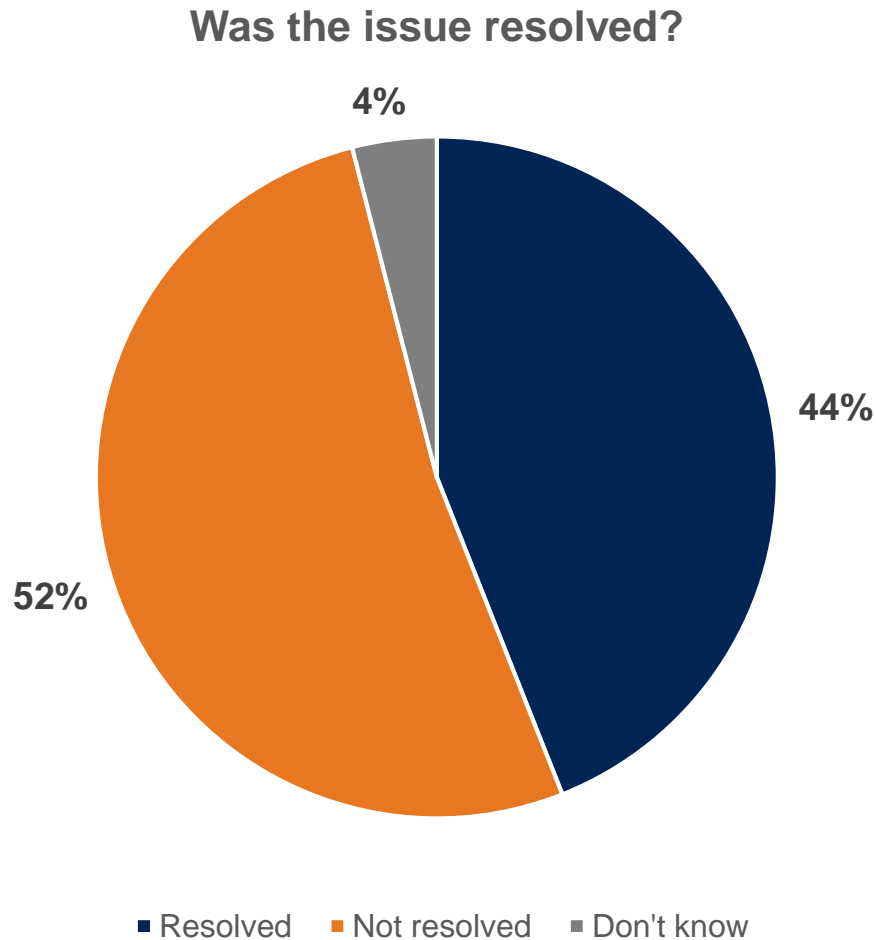


Q11. And did you complain to the seller about this problem?
Base: All experienced problems when purchasing goods from UK websites (257)

LESS THAN HALF HAD THEIR ISSUE RESOLVED

Those who complain to the seller significantly more likely to have their issue resolved

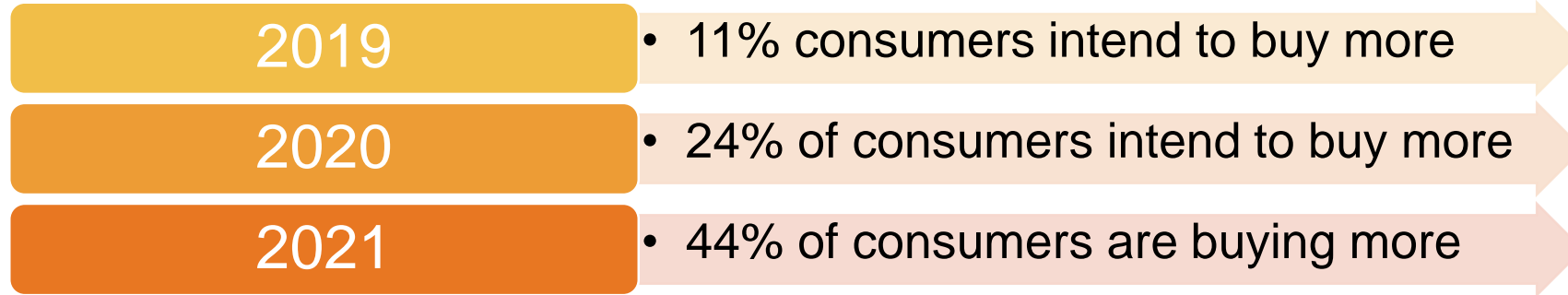
Caution Small Sample Size:
C2DE (n = 94)



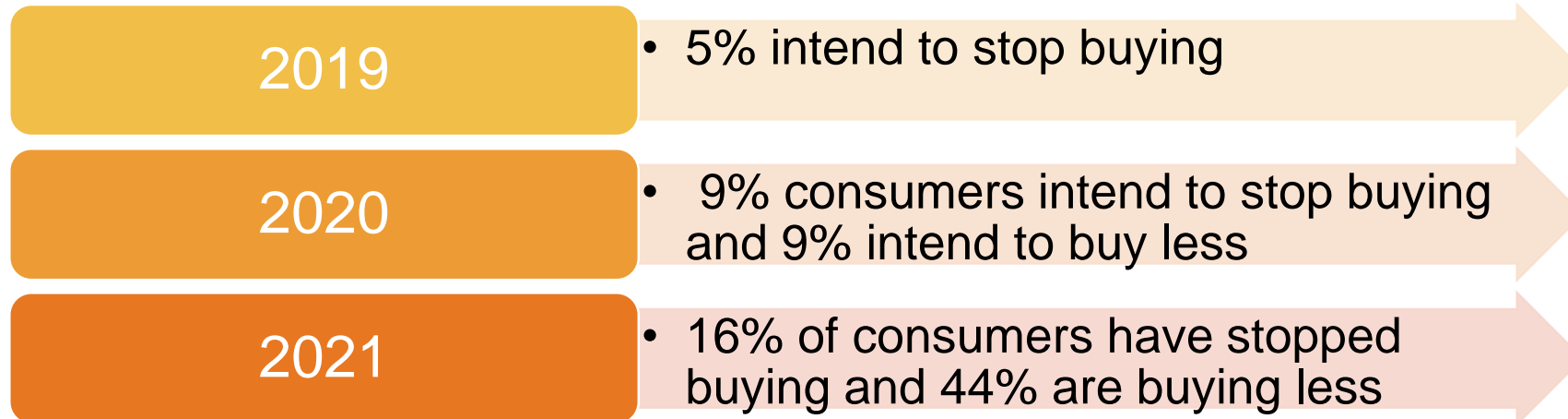
Q12. And was the issue resolved or not resolved?
Base: All experienced problems when purchasing goods from UK websites (257)

KEY TRENDS

Online shopping from Irish based website post-Brexit

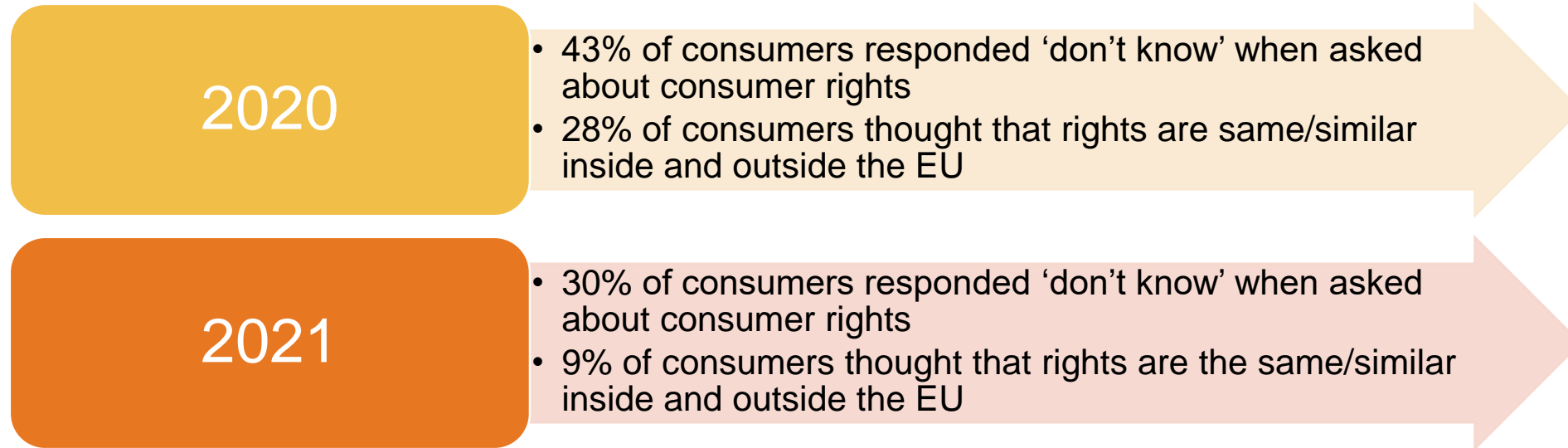


Online shopping from GB based websites post-Brexit



KEY TRENDS

Knowledge of consumer rights





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