



# **Impact of the Coronavirus on e-commerce**

## **SURVEY RESULTS REPORT**

27 March 2020

## Ecommerce Europe's Second Survey on the Coronavirus

### Online shops can still maintain their activity but more than half respondents report problems in supply chain in their countries

Ecommerce Europe conducted a new survey among its National E-commerce Association members<sup>1</sup> covering the general situation per country and the overall effect of the Coronavirus outbreak on the e-commerce sector, with a specific focus on the status of logistics in the various states. The findings show that **93% of all respondents are in full or partial lockdown, meaning that citizens in those countries can only go out with some or very strict restrictions**. However, in all cases, **online shops are still allowed to maintain their activity**. In more than half of the cases (60%), **online shops experience problems in their supply chain**. This could come from limitations in the import of products from third countries, but also from general restrictions along the supply chain, for instance at production sites, leading to shortages of certain products.

For all respondents, the governments in their countries have approved or are in process of approving **measures to finance (partial) unemployment**. These measures range from up to 800€ per employee in Greece to 84% of net salary up to 5,300€ in France.

Although it was expected that the **closure of non-essential brick-and-mortar shops** in many countries would lead to an increased pressure on online shops, only 27% of the respondents indicate this to be the case. In these cases, shops that close their physical stores, make a **shift towards selling online**, leading to a pressure on fulfillment on marketplaces.

Ecommerce Europe members that responded to the survey indicated significant pressure on parcel delivery operators in their countries. The findings show that for 60% of the respondents, a small negative impact on parcel delivery can be identified and for 33% even a strong negative impact. This is largely due to the increased pressure on the delivery operators resulting in delays. For instance, in Spain, there even has been a lock down of the postal service, leaving them limited to universal postal services. Private couriers are deciding individually to stay open or not. By the decree of the lockdown, delivery is allowed, but it is not considered an essential service (at least not for non-essential products). In contrast, in Switzerland, parcel delivery and postal services are considered part of the critical infrastructure. The government there seems to maintain it to keep a minimum of normality in these times. There also appear to be no public concerns around the safety of delivery.

In terms of **cross-border delivery**, 86% of respondents state that parcel delivery operators are not restricting or are being restricted to deliver abroad. Those that indicate that there have been problems, mention that this is largely due to the lack of flight connections.

More than half (64%) of respondents indicated that **when brick-and-mortar shops are not allowed to open in their country, they are offering alternative options to deliver products to their consumers**. Out of these respondents, in 78% of the cases, those brick-and-mortar shops start selling online.

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1. A total of 15 National E-commerce Association members of Ecommerce Europe replied to this survey, covering 13 countries, due to the fact that there can be more than one association per country. The survey run from 24 to 27 March 2020.

## E-commerce crucial to provide EU citizens with essential products

The e-commerce sector is vital during the current Coronavirus outbreak. With people increasingly being restricted to their homes, home deliveries allow people to minimize the risks to catch the virus. Online retailers provide citizens with essential products, it is therefore imperative to keep the borders open for cross-border product supplies and sales. Ecommerce Europe calls on the European Commission and Member States to ensure the free flow of goods and help delivery operators, online retailers, and in particular SMEs, to continue to carry out their essential function.

## About the Ecommerce Europe survey

In the current crisis following the outbreak of the Coronavirus, information sharing is crucial. Countries can learn from the approach of others or prepare for more severe situations by taking precautions based on the lessons of other countries. Ecommerce Europe, being the European platform where many e-commerce actors come together, wants to facilitate the knowledge sharing. To achieve this, it is carrying out a weekly survey to gain insights into two aspects: first, the general situation in a country and the overall effect of the crisis on the e-commerce sector, and second, a specific topic that is chosen per week.

# Country comparison



Country																	
AT	Full	HR	SEP	Yes	Yes	Yes	Expected	Yes	↑	No	Yes	Yes	LNI	Yes	No	No	Yes
BE	Partial	HR	SEP	Yes	Yes	Yes	Expected	Yes	↑	Yes - S	Yes	Yes	LNI	Yes	Yes	Yes	Yes
CZ	Full	HR	SEP	No	Yes	No	Yes	Yes	↓	No	No	Yes	LNI	Yes	No	No	Yes
DK	Partial	SR	Yes	Yes	Yes	No	No	Yes	↑ ↓	No	No	No	LNI	Yes	No	No	No
FR	Full	HR	SEP	Yes	Yes	Yes	Yes	Yes	↓	Yes - N	No	Yes	SNI	Yes	Yes	No	No
DE	Partial	SR	SEP	Yes	Yes	No	Yes	Yes	↑ ↓ x	Yes - N	No	Yes	SNI	Yes	No	No	Yes
GR	Full	HR	SEP	No	Yes	No	Yes	Yes	↓	No	Yes	Yes	LNI	Yes	No	No	Yes
IT	Full	HR	SEP	Yes	Yes	Yes	Expected	Yes	↓	No	No	Yes	SNI	No	Yes	No	No
NL	Partial	SR	Yes	Yes	Yes	Yes	Yes	Yes	↑ ↓ x	No	No	Yes	LNI	Yes	No	No	No
NO	Partial	Yes	Yes	No	Yes	No	Expected	Yes	↓	No	No	Yes	LNI	Yes	No	No	Yes
ES	Partial	HR	SEP	No	Yes	Yes	Yes	TBA	↑	Yes - N	No	No	LNI	No	Yes	N/A	Yes
SE	Partial	SR	Yes	Yes	Yes	No	Yes	TBA	↑ ↓ x	No	Yes	Yes	SNI	Yes	No	No	N/Ap
CH	Partial	SR	SEP	Yes	Yes	No	Yes	Yes	↑ ↓	No	No	Yes	NI/LNI	Yes	No	No	Yes

## Legend:



Country in lockdown



Free movement of people



Brick-and-mortar shops open



Are they offering alternative options to deliver products to their consumers?



Online shops active



Are online shops required to have their employees working from home except when practically impossible?



Do online shops experience problems in their supply chain?



Did the government adopt measures to finance (partial) unemployment?



What is the estimated impact of the Coronavirus on non-food online sales?



Do online shops face pressure from trade unions to close or restrict their activities?



Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?



Is parcel delivery regarded by the government as an essential infrastructure at the moment?



How does the situation affect parcel delivery?



Are automated pick-up/drop-off points for parcels still allowed to operate?



Did the government publish any guidelines on safe delivery of parcels to consumers?



Are postal/parcel delivery operators restricting or being restricted to deliver abroad?



Is "cash on delivery" still allowed?

HR - Heavy restrictions  
 SR - Some restrictions  
 SEP - Yes, but only if they sell essential products (i.e. food, healthcare, etc.)  
 TBA - It is in the process of being approved  
 ↑ - Increase in sales  
 ↓ - Decrease in sales  
 x - Complete lack of sales  
 Yes - N - Yes, a normal level of pressure  
 Yes - S - Yes, a strong level of pressure  
 SNI - Strong negative impact  
 LNI - Little negative impact  
 NI - No impact  
 N/A - Information not available  
 N/Ap - Not applicable





Country in lockdown

Full



Free movement of people

Yes, but with heavy restrictions



Brick-and-mortar shops open

Yes, but only if they sell essential products (i.e. food, healthcare, etc.)



Online shops active

Yes



Are online shops required to have their employees working from home except when practically impossible?

Yes



Are they offering alternative options to deliver products to their consumers?

Yes



Did the government adopt measures to finance (partial) unemployment?

Yes,  
80-90% up to € 5,370



Do online shops experience problems in their supply chain?

No but it is expected to happen soon



Do online shops face pressure from trade unions to close or restrict their activities?

No



What is the estimated impact of the Coronavirus on non-food online sales?

Increase in sales



Is parcel delivery regarded by the government as an essential infrastructure at the moment?

Yes



Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?

Yes



Are automated pick-up/drop-off points for parcels still allowed to operate?

Yes



How does the situation affect parcel delivery?

Little negative impact



Are postal/parcel delivery operators restricting or being restricted to deliver abroad?

No



Did the government publish any guidelines on safe delivery of parcels to consumers?

No



Is "cash on delivery" still allowed?

Yes



Country in lockdown

Partial



Free movement of people

Yes, but with heavy restrictions



Brick-and-mortar shops open

Yes, but only if they sell essential products (i.e. food, healthcare, etc.)



Online shops active

Yes



Are online shops required to have their employees working from home except when practically impossible?

Yes



Are they offering alternative options to deliver products to their consumers?

Yes



Did the government adopt measures to finance (partial) unemployment?

Yes, 70% - limited to € 2,754.76



Do online shops experience problems in their supply chain?

No, but it is expected to happen soon



Do online shops face pressure from trade unions to close or restrict their activities?

Strong level of pressure



What is the estimated impact of the Coronavirus on non-food online sales?

Increase in sales



Is parcel delivery regarded by the government as an essential infrastructure at the moment?

Yes



Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?

Yes - in terms of logistics



Are automated pick-up/drop-off points for parcels still allowed to operate?

Yes



How does the situation affect parcel delivery?

Little negative impact



Did the government publish any guidelines on safe delivery of parcels to consumers?

Yes



Are postal/parcel delivery operators restricting or being restricted to deliver abroad?

No



Is "cash on delivery" still allowed?

No



Country in lockdown

Full



Free movement of people

Yes, but with heavy restrictions



Brick-and-mortar shops open

Yes, but only if they sell essential products (i.e. food, healthcare, etc.)



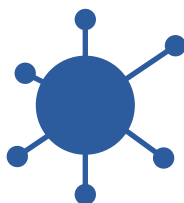
Online shops active

Yes



Are online shops required to have their employees working from home except when practically impossible?

No



Are they offering alternative options to deliver products to their consumers?

No



Did the government adopt measures to finance (partial) unemployment?

Yes, 50% to 80% depending on the situation



Do online shops experience problems in their supply chain?

Yes



Do online shops face pressure from trade unions to close or restrict their activities?

No



What is the estimated impact of the Coronavirus on non-food online sales?

Decrease in sales



Is parcel delivery regarded by the government as an essential infrastructure at the moment?

Yes



Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?

No



Are automated pick-up/drop-off points for parcels still allowed to operate?

Yes



How does the situation affect parcel delivery?

Little negative impact



Are postal/parcel delivery operators restricting or being restricted to deliver abroad?

No



Did the government publish any guidelines on safe delivery of parcels to consumers?

No



Is "cash on delivery" still allowed?

Yes



Country in lockdown

Partial



Free movement of people

Yes, but with some restrictions



Brick-and-mortar shops open

Yes



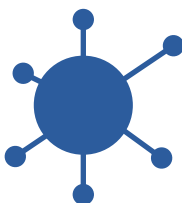
Online shops active

Yes



Are online shops required to have their employees working from home except when practically impossible?

No



Are they offering alternative options to deliver products to their consumers?

Yes



Did the government adopt measures to finance (partial) unemployment?

Yes, 75% and up to € 3,000



Do online shops experience problems in their supply chain?

No



Do online shops face pressure from trade unions to close or restrict their activities?

No



What is the estimated impact of the Coronavirus on non-food online sales?

Increase & decrease in sales



Is parcel delivery regarded by the government as an essential infrastructure at the moment?

No



Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?

No



Are automated pick-up/drop-off points for parcels still allowed to operate?

Yes



How does the situation affect parcel delivery?

Little negative impact



Are postal/parcel delivery operators restricting or being restricted to deliver abroad?

No



Did the government publish any guidelines on safe delivery of parcels to consumers?

No



Is "cash on delivery" still allowed?

No





Country in lockdown

Full



Free movement of people

Yes, but with heavy restrictions



Brick-and-mortar shops open

Yes, but only if they sell essential products (i.e. food, healthcare, etc.)



Online shops active

Yes



Are online shops required to have their employees working from home except when practically impossible?

Yes



Are they offering alternative options to deliver products to their consumers?

Yes



Did the government adopt measures to finance (partial) unemployment?

Yes, 84% of net salary up to € 5,300



Do online shops experience problems in their supply chain?

Yes



Do online shops face pressure from trade unions to close or restrict their activities?

Normal level of pressure



What is the estimated impact of the Coronavirus on non-food online sales?

Decrease in sales



Is parcel delivery regarded by the government as an essential infrastructure at the moment?

Yes



Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?

No



Are automated pick-up/drop-off points for parcels still allowed to operate?

Yes



How does the situation affect parcel delivery?

Strong negative impact



Are postal/parcel delivery operators restricting or being restricted to deliver abroad?

No



Did the government publish any guidelines on safe delivery of parcels to consumers?

Yes



Is "cash on delivery" still allowed?

No



Country in lockdown

Partial



Free movement of people

Yes, but with some restrictions



Brick-and-mortar shops open

Yes, but only if they sell essential products (i.e. food, healthcare, etc.)



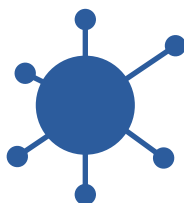
Online shops active

Yes



Are online shops required to have their employees working from home except when practically impossible?

No



Are they offering alternative options to deliver products to their consumers?

Yes



Did the government adopt measures to finance (partial) unemployment?

Yes, 50% - 65% depending on the situation



Do online shops experience problems in their supply chain?

Yes



Do online shops face pressure from trade unions to close or restrict their activities?

Yes, a normal level of pressure



What is the estimated impact of the Coronavirus on non-food online sales?

Increase, decrease & complete lack of sales



Is parcel delivery regarded by the government as an essential infrastructure at the moment?

Yes



Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?

No



Are automated pick-up/drop-off points for parcels still allowed to operate?

Yes



How does the situation affect parcel delivery?

Strong negative impact



Did the government publish any guidelines on safe delivery of parcels to consumers?

No



Are postal/parcel delivery operators restricting or being restricted to deliver abroad?

No



Is "cash on delivery" still allowed?

Yes



Country in lockdown

Full



Free movement of people

Yes, but with heavy restrictions



Brick-and-mortar shops open

Yes, but only if they sell essential products (i.e. food, healthcare, etc.)



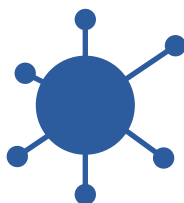
Online shops active

Yes



Are online shops required to have their employees working from home except when practically impossible?

No



Are they offering alternative options to deliver products to their consumers?

No



Did the government adopt measures to finance (partial) unemployment?

Yes, up to €800 per employee



Do online shops experience problems in their supply chain?

Yes



Do online shops face pressure from trade unions to close or restrict their activities?

No



What is the estimated impact of the Coronavirus on non-food online sales?

Decrease in sales



Is parcel delivery regarded by the government as an essential infrastructure at the moment?

Yes



Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?

Yes



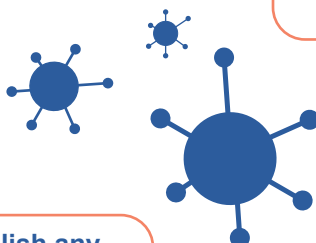
Are automated pick-up/drop-off points for parcels still allowed to operate?

Yes



How does the situation affect parcel delivery?

Little negative impact



Are postal/parcel delivery operators restricting or being restricted to deliver abroad?

No



Did the government publish any guidelines on safe delivery of parcels to consumers?

No



Is "cash on delivery" still allowed?

Yes



Country in lockdown

**Full**



Free movement of people

**Yes, but with heavy restrictions**



Brick-and-mortar shops open

**Yes, but only if they sell essential products (i.e. food, healthcare, etc.)**



Online shops active

**Yes**



Are online shops required to have their employees working from home except when practically impossible?

**Yes**



Are they offering alternative options to deliver products to their consumers?

**Yes**



Did the government adopt measures to finance (partial) unemployment?

**Yes**



Do online shops experience problems in their supply chain?

**No but it is expected to happen soon**



Do online shops face pressure from trade unions to close or restrict their activities?

**No**



What is the estimated impact of the Coronavirus on non-food online sales?

**Decrease in sales**



Is parcel delivery regarded by the government as an essential infrastructure at the moment?

**Yes**



Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?

**No**



Are automated pick-up/drop-off points for parcels still allowed to operate?

**No**



How does the situation affect parcel delivery?

**Strong negative impact**



Are postal/parcel delivery operators restricting or being restricted to deliver abroad?

**No**



Did the government publish any guidelines on safe delivery of parcels to consumers?

**Yes**



Is "cash on delivery" still allowed?

**No**



Country in lockdown

Partial



Free movement of people

Yes, but with some restrictions



Brick-and-mortar shops open

Yes



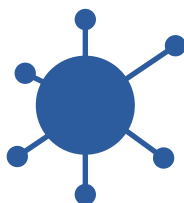
Online shops active

Yes



Are online shops required to have their employees working from home except when practically impossible?

Yes



Are they offering alternative options to deliver products to their consumers?

N/A



Did the government adopt measures to finance (partial) unemployment?

Yes, up to 90% for company workers  
Up to € 1,000/month for indep. workers



Do online shops experience problems in their supply chain?

Yes



Do online shops face pressure from trade unions to close or restrict their activities?

No



What is the estimated impact of the Coronavirus on non-food online sales?

Increase, decrease & complete lack of sales



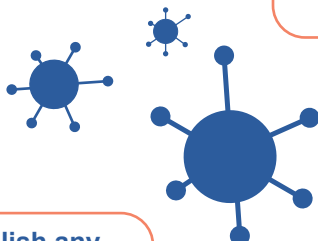
Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?

No



How does the situation affect parcel delivery?

Little negative impact



Is parcel delivery regarded by the government as an essential infrastructure at the moment?

Yes



Are automated pick-up/drop-off points for parcels still allowed to operate?

Yes



Are postal/parcel delivery operators restricting or being restricted to deliver abroad?

No



Did the government publish any guidelines on safe delivery of parcels to consumers?

No



Is "cash on delivery" still allowed?

No





Country in lockdown

Partial



Free movement of people

Yes



Brick-and-mortar shops open

Yes



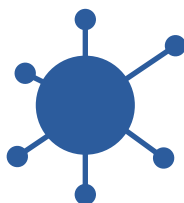
Online shops active

Yes



Are online shops required to have their employees working from home except when practically impossible?

No



Are they offering alternative options to deliver products to their consumers?

No



Did the government adopt measures to finance (partial) unemployment?

Yes, the government covers costs of lay-offs to both employers and employees



Do online shops experience problems in their supply chain?

No, but it is expected to happen soon



Do online shops face pressure from trade unions to close or restrict their activities?

No



What is the estimated impact of the Coronavirus on non-food online sales?

Decrease in sales



Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?

No



Is parcel delivery regarded by the government as an essential infrastructure at the moment?

Yes



Are automated pick-up/drop-off points for parcels still allowed to operate?

Yes



How does the situation affect parcel delivery?

Little negative impact



Did the government publish any guidelines on safe delivery of parcels to consumers?

No



Are postal/parcel delivery operators restricting or being restricted to deliver abroad?

No



Is "cash on delivery" still allowed?

Yes



Country in lockdown

Partial



Free movement of people

Yes, but with heavy restrictions



Brick-and-mortar shops open

Yes, but only if they sell essential products (i.e. food, healthcare, etc.)



Online shops active

Yes



Are online shops required to have their employees working from home except when practically impossible?

Yes



Are they offering alternative options to deliver products to their consumers?

Yes



Did the government adopt measures to finance (partial) unemployment?

It is in the process of being approved



Do online shops experience problems in their supply chain?

Yes



Do online shops face pressure from trade unions to close or restrict their activities?

Normal level of pressure



What is the estimated impact of the Coronavirus on non-food online sales?

Increase in sales



Is parcel delivery regarded by the government as an essential infrastructure at the moment?

Yes



Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?

No



Are automated pick-up/drop-off points for parcels still allowed to operate?

Only for essential goods



How does the situation affect parcel delivery?

Little negative impact



Are postal/parcel delivery operators restricting or being restricted to deliver abroad?

N/A



Did the government publish any guidelines on safe delivery of parcels to consumers?

Yes



Is "cash on delivery" still allowed?

Yes



Country in lockdown

Partial



Free movement of people

Yes, but with some restrictions



Brick-and-mortar shops open

Yes



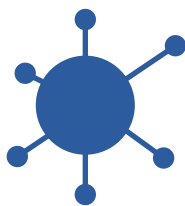
Online shops active

Yes



Are online shops required to have their employees working from home except when practically impossible?

No



Are they offering alternative options to deliver products to their consumers?

Yes



Did the government adopt measures to finance (partial) unemployment?

It is in the process of being approved



Do online shops experience problems in their supply chain?

Yes



Do online shops face pressure from trade unions to close or restrict their activities?

No



What is the estimated impact of the Coronavirus on non-food online sales?

Increase, decrease & complete lack of sales



Is parcel delivery regarded by the government as an essential infrastructure at the moment?

Yes



Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?

Yes



Are automated pick-up/drop-off points for parcels still allowed to operate?

Yes



How does the situation affect parcel delivery?

Strong negative impact



Did the government publish any guidelines on safe delivery of parcels to consumers?

No



Are postal/parcel delivery operators restricting or being restricted to deliver abroad?

No



Is "cash on delivery" still allowed?

N/A



Country in lockdown

Partial



Free movement of people

Yes, but with some restrictions



Brick-and-mortar shops open

Yes, but only if they sell essential products (i.e. food, healthcare, etc.)



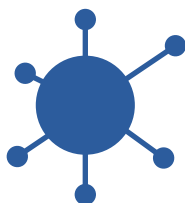
Online shops active

Yes



Are online shops required to have their employees working from home except when practically impossible?

No



Are they offering alternative options to deliver products to their consumers?

Yes



Did the government adopt measures to finance (partial) unemployment?

Yes, up to 80%



Do online shops experience problems in their supply chain?

Yes



Do online shops face pressure from trade unions to close or restrict their activities?

No



What is the estimated impact of the Coronavirus on non-food online sales?

Increase & decrease in sales



Is parcel delivery regarded by the government as an essential infrastructure at the moment?

Yes



Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?

No



Are automated pick-up/drop-off points for parcels still allowed to operate?

Yes



How does the situation affect parcel delivery?

No to little negative impact



Are postal/parcel delivery operators restricting or being restricted to deliver abroad?

No



Did the government publish any guidelines on safe delivery of parcels to consumers?

No



Is "cash on delivery" still allowed?

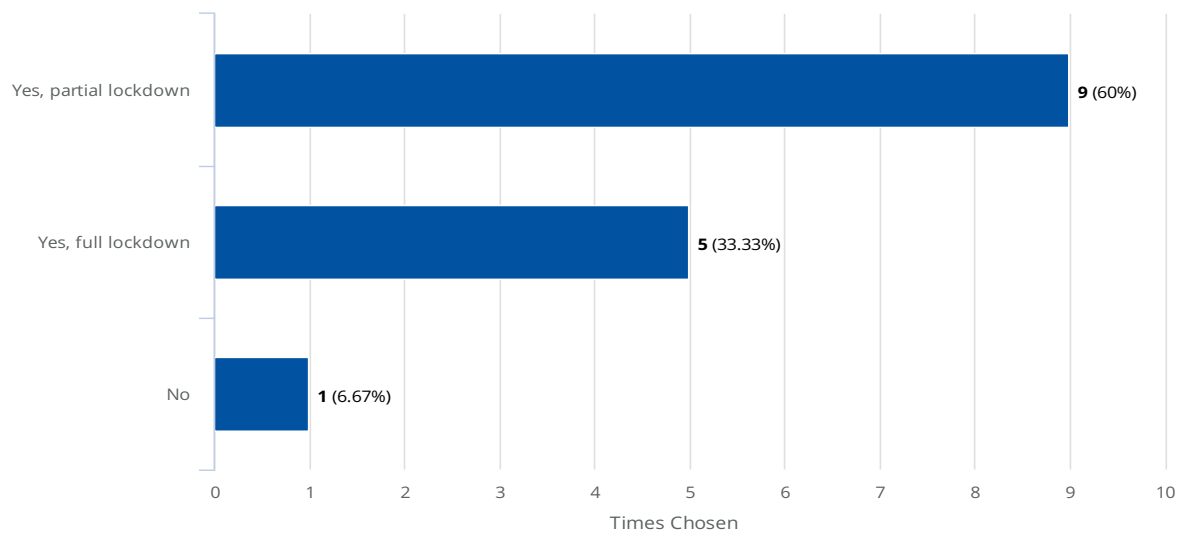
Yes

# Overview of survey results



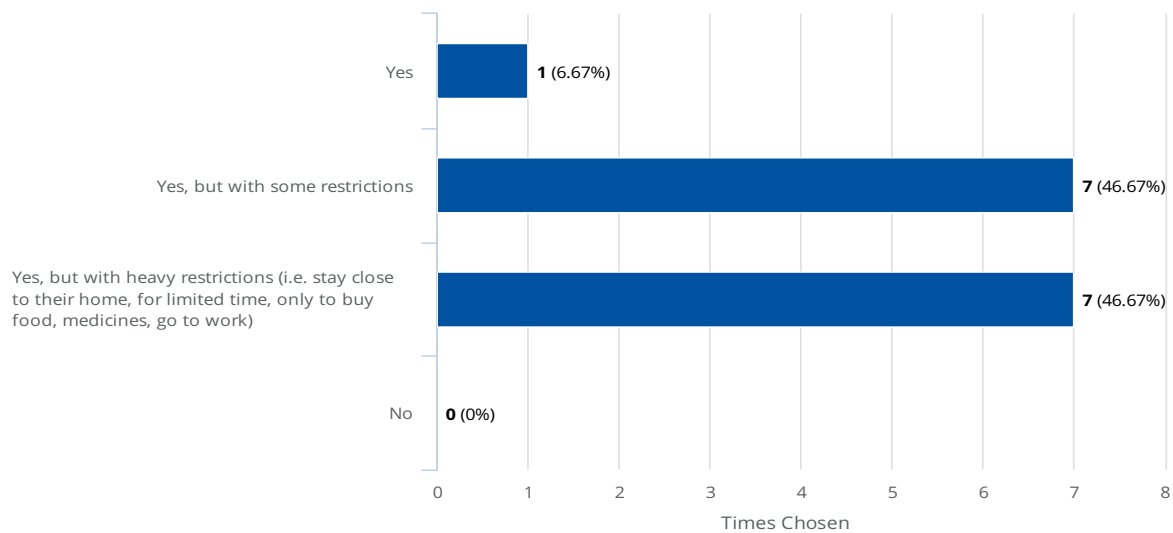
## Is your country in lockdown?

Number of responses: 15



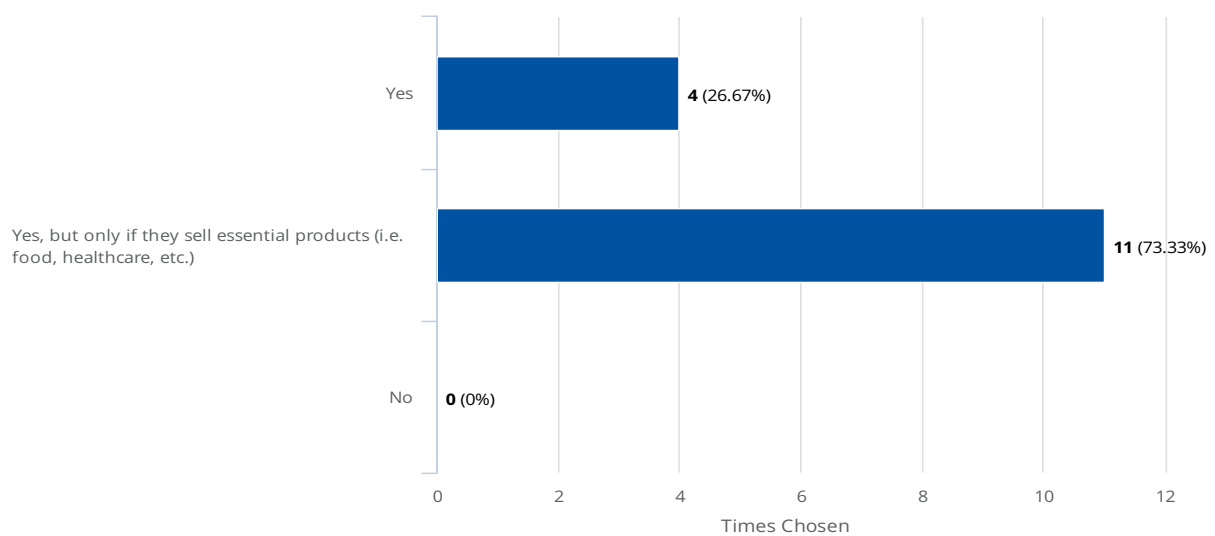
### Are people in your country allowed to go out?

Number of responses: 15



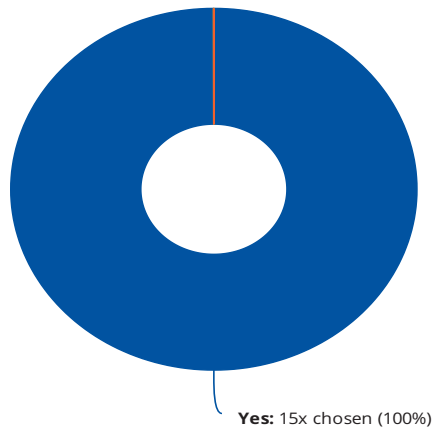
### Are brick-and-mortar shops still allowed to be open?

Number of responses: 15



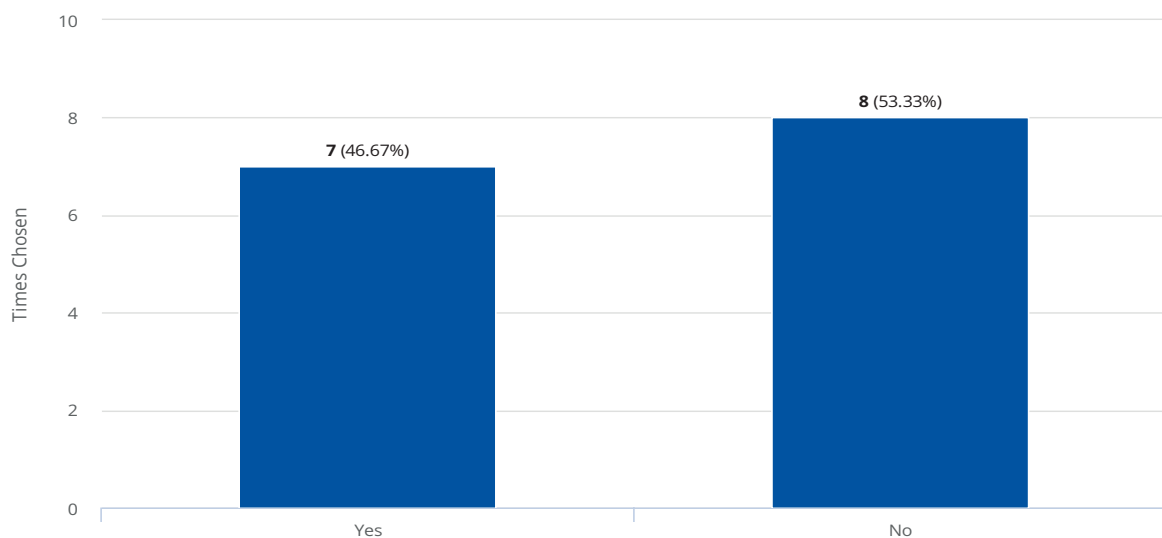
### Are online shops still allowed to maintain their activity?

Number of responses: 15



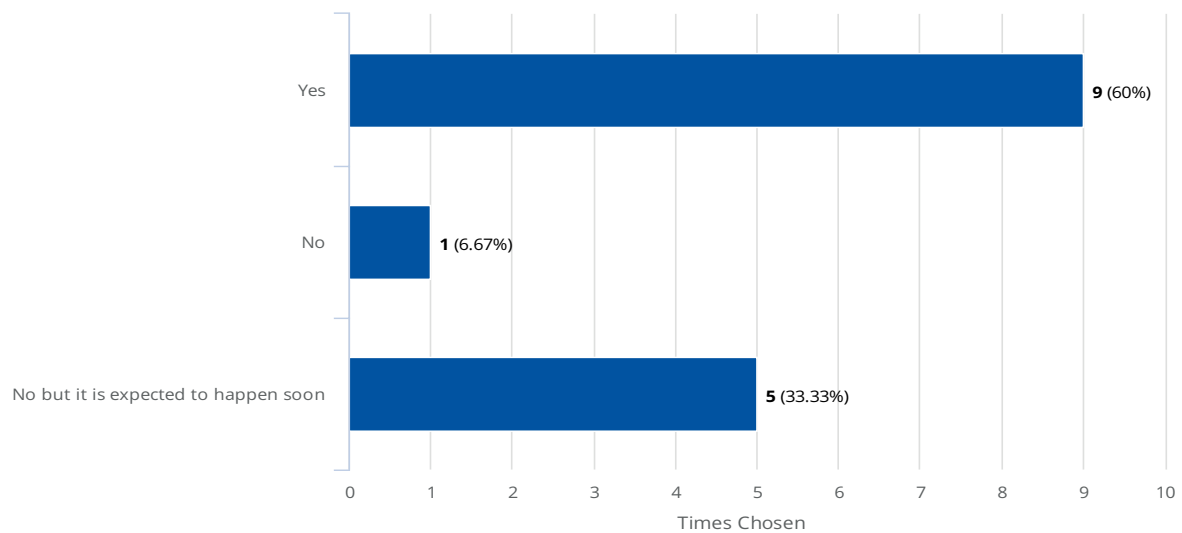
### Are online shops required to have their employees working from home except when practically impossible?

Number of responses: 15



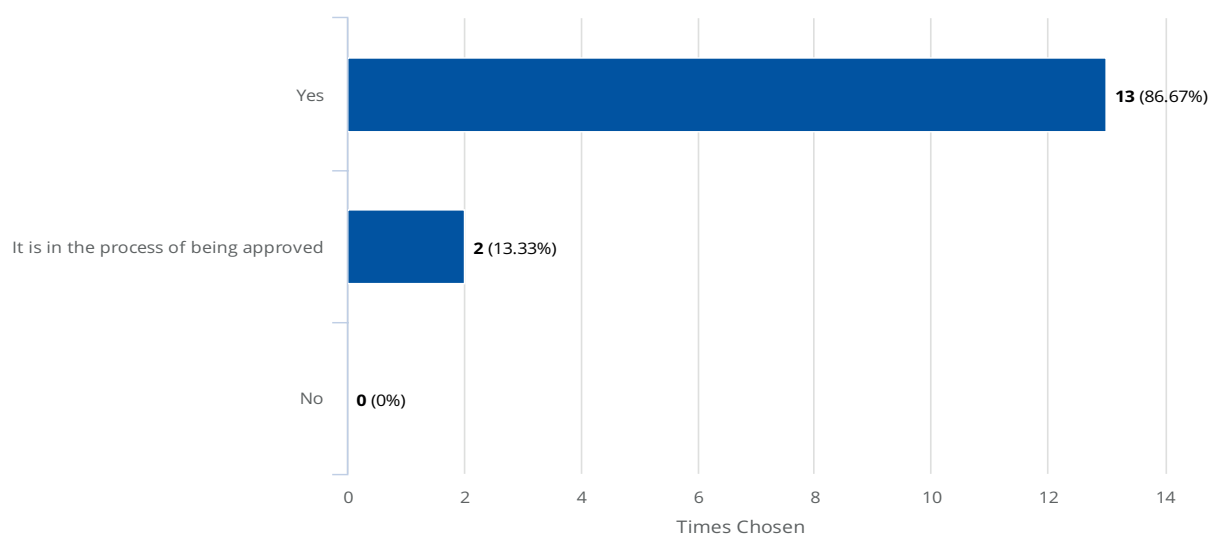
### Do online shops in your country experience problems in their supply chain:

Number of responses: 15



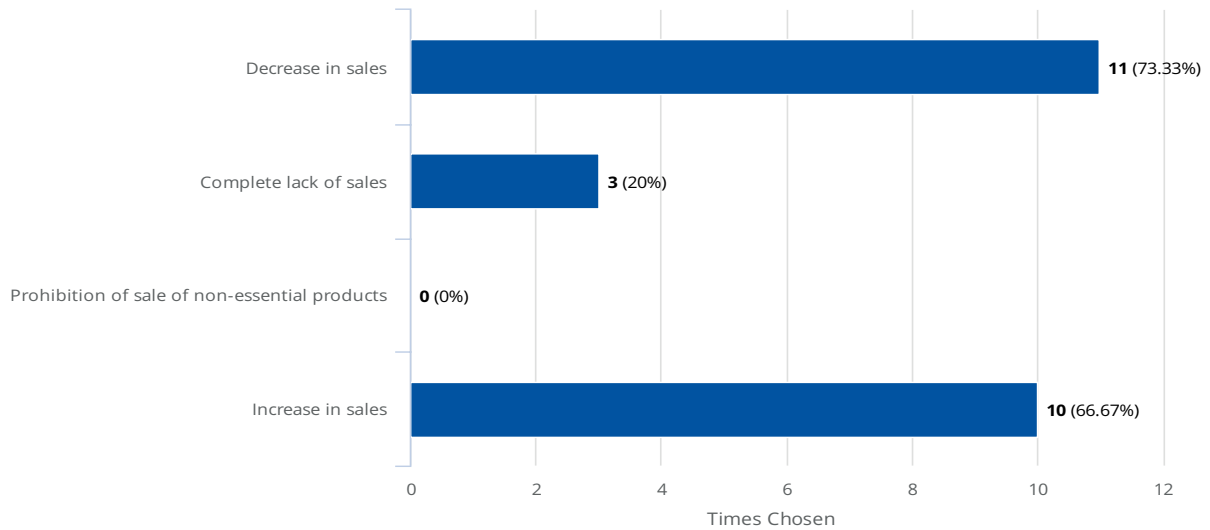
### Did your government adopt measures to finance (partial) unemployment?

Number of responses: 15



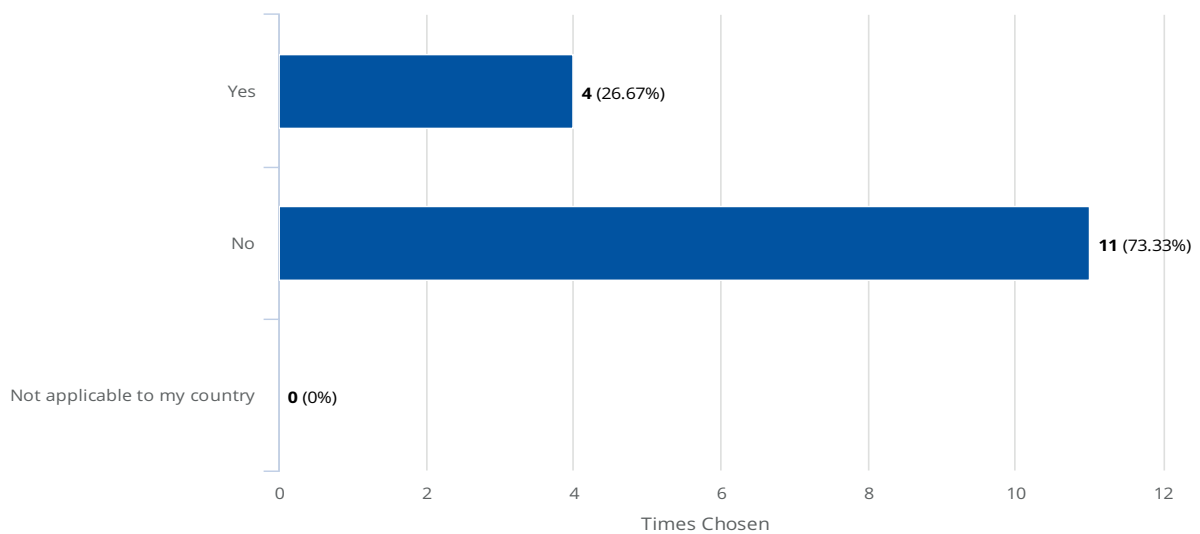
### What is the estimated impact of the Coronavirus on non-food online sales in your country (more answers possible)?

Number of responses: 15



### Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?

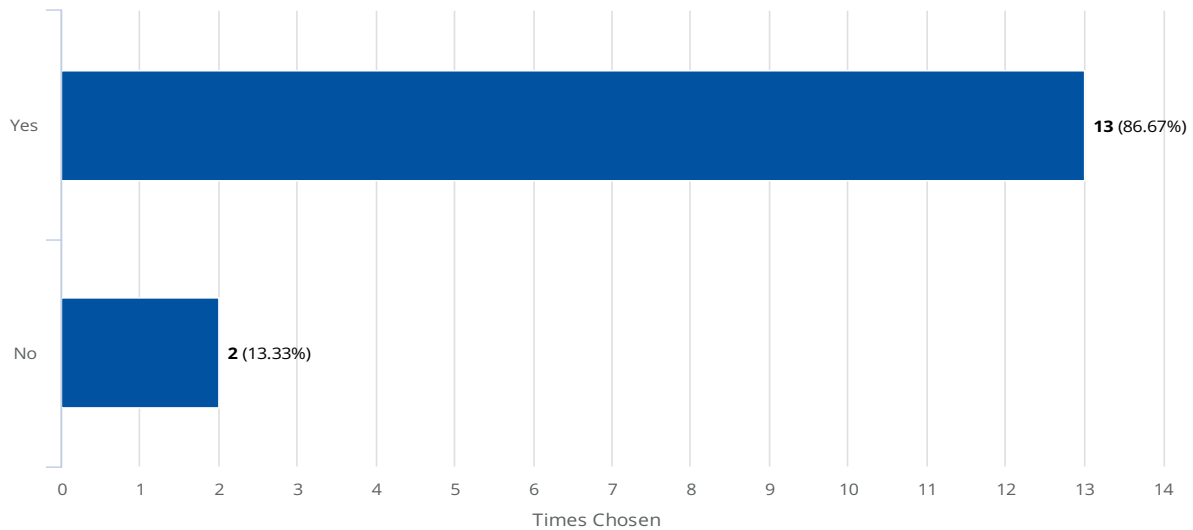
Number of responses: 15





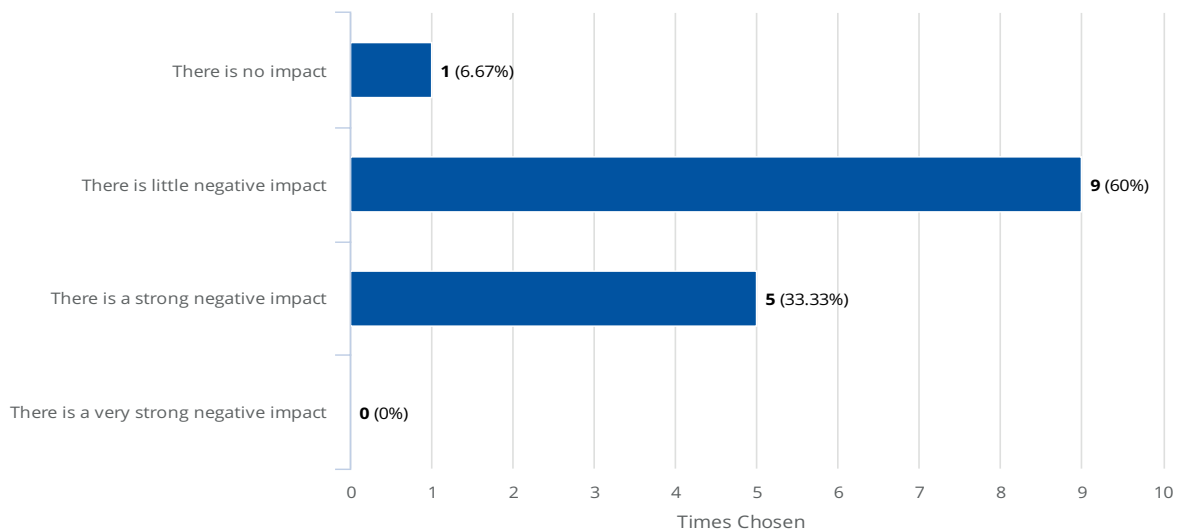
## Is parcel delivery regarded by the government as an essential infrastructure in your country at the moment?

Number of responses: 15



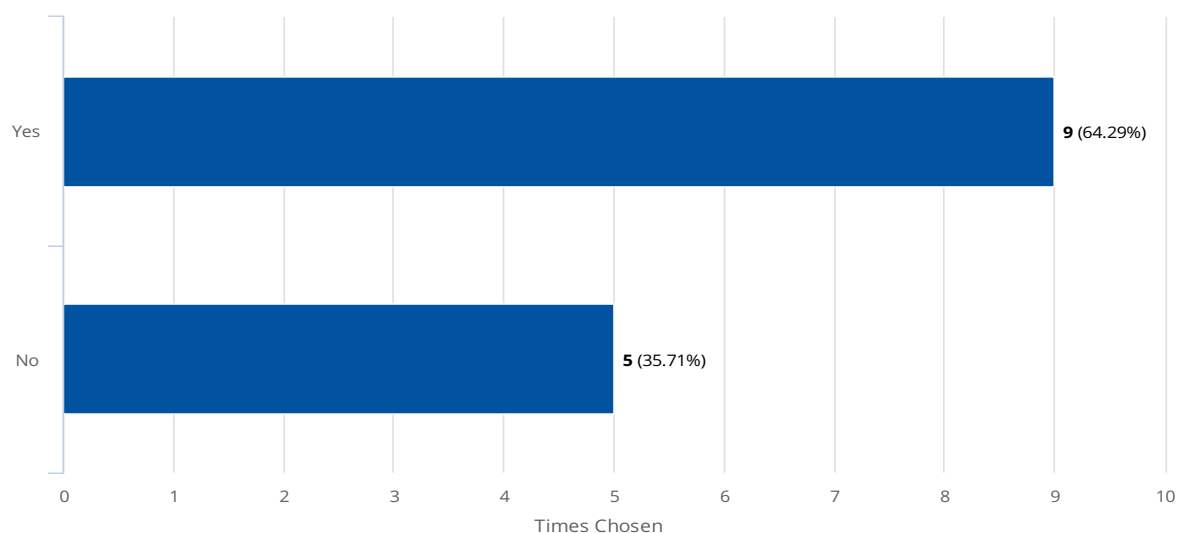
## How does the situation affect parcel delivery?

Number of responses: 15



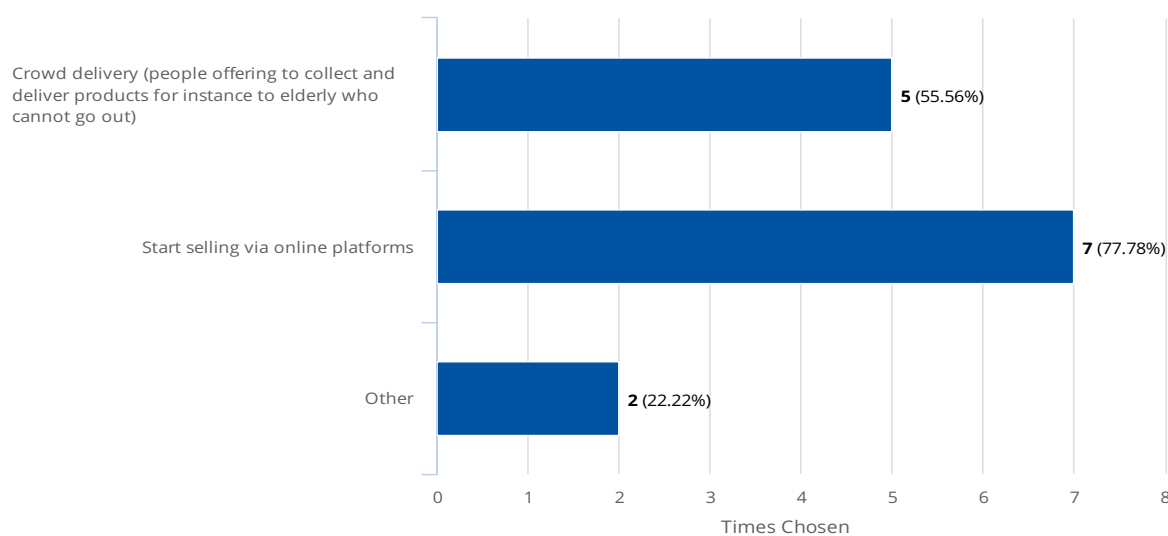
## If brick-and-mortar shops are not allowed to open in your country, are they offering alternative options to deliver products to their consumers?

Number of responses: 14



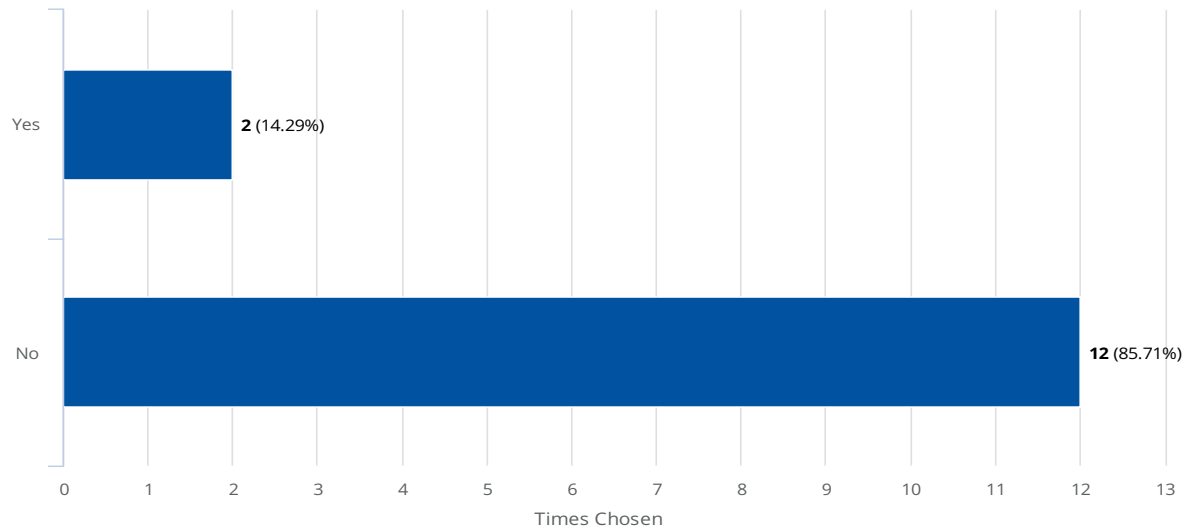
## Please select:

Number of responses: 9



### Are postal/parcel delivery operators restricting or being restricted to deliver from your country to abroad?

Number of responses: 14





# Ecommerce Europe

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