

# Amazon: Creating an Ecosystem - Europe - 2023

Report Price: £2195 | \$2995 | €2600

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## This report looks at the following areas:

- The impact of the cost of living crisis on Amazon's business
- An overview of the global Amazon business, including revenues and performance of key business units
- Amazon's position within each market, including market share
- A profile of Amazon shoppers, by key demographics
- Products purchased via Amazon in the past year by key category
- Amazon Prime membership, including a profile of members and services used
- Attitudes to price and convenience of shopping with Amazon as well as ethical and environmental considerations of shopping with the business.

The onset of the pandemic served to drive significant growth for Amazon, and in particular its online retail operation, with the 37.6% growth in global net sales recorded in 2020 the quickest it had recorded since 2011. Further pandemic heightened demand in the first half of 2021 helped delay the natural annualisation of this peak in demand, with this coming through more strongly in 2022 and growth slowing to 9.4%, a record low rate of growth for the business. Globally Amazon's net sales broke the \$500 billion mark in 2022. Profit performance also dipped in 2022. A very notable point was reached in the history of Amazon in 2022, with retail for the first time accounting for less than half of its revenue. Combined online and physical store revenue accounted for 46.5% of revenues, down from 50.9% in 2021. This change reflects the impact of the development of the Amazon ecosystem.

Our consumer survey for this report reveals that across Europe, Amazon is most popular in Italy (followed by Spain) where more than nine in ten consumers have made a purchase using the site over the past 12 months. Additionally, Italians and Spaniards lead when it comes to participation in Amazon Prime in Europe. Overall, between 36% and 57% of European consumers say they personally have membership. Furthermore, between 11% and a fifth Europeans



"Amazon is the undisputed leader of the dynamic online retailing market in Europe. It is set to benefit as the channel continues to gain popularity across product and service categories and it has benefitted greatly from the pandemic."

- **Utku Tansel, Retail Analyst**

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while not being a member, say they use Amazon Prime services via someone else's membership (eg friend's account, Amazon Household).

Fast delivery is a key differentiator for Amazon in Europe. As such, between 63% (in Germany) and 79% (in Italy and Spain) of respondents said Amazon's delivery speed is the main reason they shop there. Speed and instant gratification are now becoming key differentiators in home delivery services in retail, especially during the accelerated shift to buying online which was turbo-charged by the pandemic. To be able to meet the demand, Amazon has been expanding its operations across Europe. Going forwards, there are potential opportunity areas in which Amazon can develop further. Indeed, across Europe, between more than a quarter (26% in France) and almost half (46% in Italy) of respondents said they would be interested in buying prescription medication from the retailer.

However, our research also confirms that there are barriers to overcome which could dampen growth. Indeed, between 27-31% of respondents said reports about working conditions at Amazon have discouraged them from shopping with Amazon. In addition, between 17% (in Italy) and 27% (the UK and France) of respondents said they feel guilty about shopping with Amazon.

The data highlights that sustainability is now a key trend when shopping on Amazon across Europe with many consumers looking for ways to conserve the planet's resources. When it comes to shopping on Amazon, between a quarter (in Italy) and more than half (55% in the UK) of respondents across Europe think their Amazon orders come with too much packaging. Having said that, between 57% (in France and Germany) and almost three-quarters (73% in Italy) think Amazon is doing a lot to be more environmentally friendly confirming that its sustainability-led initiatives are appreciated by consumers.

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