VALUE OF E-COMMERCE FOR EU CONSUMERS
THE ROLE OF CLOTHING E-COMMERCE IN ENHANCING AFFORDABILITY AND AVAILABILITY

Copenhagen Economics

E-commerce has reshaped how people shop, with **77% of EU internet users buying online in 2024** - up from 53% in 2010. Clothing and accessories lead in popularity.

While policy concerns grow, **consumer benefits are often overlooked**. This report explores them via a pan-EU survey of SHEIN customers and responses from 27,000 participants across the 27 EU Member States.

E-COMMERCE EXPANDS ACCESS TO AFFORDABLE PRODUCTS

LOWER PRICES FOR ONLINE GOODS

- Easier price comparison
- Stronger competition
- New business models

INCREASED PRODUCT CHOICE AND AVAILABILITY

BENEFICIAL FOR

- Consumers with a preference for variety
- Consumers living in underserved areas

CONSUMER WELFARE GAINS

- Access to lower prices
- Search efficiency
- Convenience
- Increased product choice

CONSUMER SURVEY REVEALS AFFORDABILITY AND ACCESSIBILITY ARE KEY REASONS FOR SHOPPING FOR CLOTHING ONLINE

AFFORDABILITY MATTERS

68% of respondents report **price as the top priority** when buying clothes

81% of respondents believe **online shopping offers better deals** than physical stores

ONLINE SHOPPING SUPPORTS LOWER-INCOME GROUPS

70% of lower-income consumers rank **price** as the most important factor when buying new clothes

36% of lower-income consumers say shopping for clothing online helps them **afford more essentials**

GREATER ACCESS IS A KEY FACTOR FOR CONSUMERS

64% of respondents report shopping for clothing online gives them **access to clothes that better fit their preferences**

30% of respondents say they would **miss inclusive sizing options** of online shopping were unavailable

RURAL AREAS FACE DISTINCT ACCESSIBILITY CHALLENGES

58% of rural respondents say they always or often have **difficulty finding suitable or affordable clothes near them**

24% of rural respondents report **spending over €20 per trip** for a round trip to a physical store

ESTIMATED EU-WIDE SAVINGS FROM PURCHASING CLOTHING ONLINE

33% **savings estimated** by respondents when buying online compared, to purchasing similar items in physical stores

For SHEIN specifically, respondents estimate they are saving 43% when shopping on SHEIN compared to physical stores

€12.8 **monthly perceived savings** per online consumer

Approx. 19% of average monthly household spending on clothing and footwear per capita across the EU

€22 billion potential **annual savings across the EU**

IMPACT ASSESSMENTS ON ONLINE CONSUMER BEHAVIOUR IN THE EU SHOULD CONSIDER

- THE EFFECT ON HOUSEHOLDS BUDGETS
- THE EXPERIENCES OF MARGINALISED GROUPS
- NON-PRICE BENEFITS AND THE VALUE OF INCLUSIVE FASHION