



Retailers' attitudes towards cross-border trade and consumer protection 2018

Final Report

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Retailers' attitudes towards cross-border trade and consumer protection 2018

Main Report

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INTRODUCTION

The internal market of the EU has the potential to be the largest retail market in the world. Consumer spending accounts for 53.7% of EU27_2019 GDP, making it a critical factor in the European economy¹, and consumer conditions are positively related to economic situation in Member States.

This report presents the results of the survey “Retailers’ attitudes towards cross-border trade and consumer protection”, carried out in May and June 2018. The present survey is designed to add to the general knowledge base of national and European consumer and retailer conditions by investigating the perceptions and experiences of European retailers in a number of areas:

- Characteristics of retailers in terms of the sales channels used, as well as the languages used to sell to consumers;
- Current levels of cross-border trade;
- Current levels of online sales, confidence to sell online, and obstacles to developing domestic and cross-border online sales;
- Knowledge of their legal obligations towards consumers;
- Knowledge of and compliance with consumer legislation, as well as views on product safety;
- Consumer complaints and awareness of alternative dispute resolution mechanisms.

This survey follows on from a series of consumer protection surveys targeting retailers, conducted since 2006 on behalf of the European Commission, “Retailers’ attitudes towards cross-border trade and consumer protection 2016” (2016) and DG SANCO - Flash Eurobarometer surveys 396 (2014), 359 (2012), 331 (2011), 300 (2010), 278 (2009), 224 (2008) and 186 (2006)². There have been no changes in the methodology since 2016.

¹ Source: Eurostat (national accounts)

² All reports can be found at http://ec.europa.eu/consumers/strategy/facts_eurobar_en.htm

Structure of the results

For sections one to five of the report, the analyses presented for each of the different survey topics follow the order presented below. Only statistically significant³ findings are discussed.

Figures at EU27_2019⁴ level weighted by number of companies visualized with bar charts;

Figures at the level of EU27_2019, EU28 and differences between regions, as well as year-to-year differences;

Figures at the countries level in the current survey and, if available, comparison with prior editions of the study; these and the two former analysis are presented in maps and tables in the main body of the report;

Analysis of figures by characteristics of retailers (e.g. size, sector), with tables in the annex of the report.

The following points are related to the visual elements of this report:

In tables presenting current year figures and year-to-year change, current year figures are expressed as percentages (%), while changes are expressed in percentage points (pp), unless another methodology is explicitly mentioned;

Base sizes accompanying charts, tables and other graphic elements refer to the unweighted sample size;

In a few cases, results for some countries are based on a very small sample (less than 100 observations) and should therefore be considered as mainly indicative. We have included a specific footnote to highlight these cases.

This survey was carried out by the Kantar Public Brussels network in the 27 Member States of the European Union and in Iceland, Norway and the United Kingdom between 02 May and 26 June 2018. The target companies are retail companies selling goods or services directly to end consumers and employing at least 10 people⁵. Eligible respondents were individuals with decision-making responsibilities⁶. In each country around 400 retailers were interviewed, with the exception of Cyprus, Luxembourg, Malta and Iceland (each around 150). In those four countries, the margin of errors is therefore higher than in the other countries surveyed (as explained in the technical specifications).

³ Statistical significance is determined by observing the p-value obtained from a Student's t-test across two dimensions. The first one is about means, or whether the difference between EU mean and average figures for the Eurozone, regions and countries, is too wide to be random, based on all the observations of the sample (e.g. the figures falls out of the range within which theoretically 95% of the observations would be found). The second one is about increase or decrease, or comparing the change in the figure from one year to the other and whether such difference can be considered as random at a specific level of confidence (e.g. "T-test at 95% level" means there is a 5% theoretical probability the difference is random). **Please note that significance testing in the report is based on rounded data.**

⁴ The EU as it will be in 2019 – excluding the United Kingdom.

⁵ More specifically, the target population is defined as "all enterprises established in the country surveyed, selling to final consumers and employing at least 10 persons, belonging to the following NACE Rev2 categories: D3512, D3514, D3523, G45, G47, H49, H50, H51, H52, H53, I55, I56, J5914, J61, J62, K64, K65, L68, N77, N79, S95 and S96".

⁶ Whenever a company was eligible the selected respondent had to be someone with decision making responsibilities in the company (managing director, CEO) or leading the commercial activities of the company (Commercial managers, sales managers, marketing managers). When there are several decision-makers, the respondent selects oneself.

All interviews were carried by telephone, using the Kantar e-Call centre (our centralized CATI system). The sample was selected from a combination of international and local business databases.

A technical note on the manner in which interviews were conducted is appended as an annex to this report.

Note: In this report, countries are referred to by their official abbreviation. The abbreviations used in this report correspond to:

ABBREVIATIONS			
BE	Belgium	LT	Lithuania
BG	Bulgaria	LU	Luxembourg
CZ	Czech Republic	HU	Hungary
DK	Denmark	MT	Malta
DE	Germany	NL	The Netherlands
EE	Estonia	AT	Austria
IE	Ireland	PL	Poland
EL	Greece	PT	Portugal
ES	Spain	RO	Romania
FR	France	SI	Slovenia
HR	Croatia	SK	Slovakia
IT	Italy	FI	Finland
CY	Republic of Cyprus*	SE	Sweden
LV	Latvia		
		EU27_2019	European Union 27 Member States (excluding the UK)
IS	Iceland		
NO	Norway		
UK	The United Kingdom		
EU28	European Union – 28 Member States		
Region North ⁷	DK, EE, LT, LV, FI, SE	Region East	BG, CZ, HR, HU, PL, RO, SI, SK
Region South	EL, ES, IT, CY, MT, PT	Region West	BE, DE, IE, FR, LU, NL, AT

* Cyprus as a whole is one of the 28 European Union Member States. However, the 'acquis communautaire' has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the 'CY' category and in the EU28 average.

⁷ Contrary to the final report for the 2016 wave of the survey, Estonia, Lithuania and Latvia have been included in the Northern region (they were included in the Eastern region in final reports for the waves up to the 2016 one).

KEY FINDINGS

The figures in this section represent the average of the 27 European Union Member States in 2019 unless explicitly mentioned otherwise.

Average retailers' knowledge of consumer's rights is at around 55%

On average, only around half (55.2%) of the answers about consumer rights in all five target areas are correct:

- o Retailers are most likely to know it is not prohibited to promote products for children by directly targeting the parents in the advertisements (72.2%).
- o Two thirds (67.8%) know it is prohibited to describe a product as "free" although it is only available free of charge to consumers calling a premium rate phone number.
- o Almost six in ten (59.9%) know it is prohibited to include an invoice or a similar document seeking payment in marketing material.
- o Just over four in ten are aware that it is prohibited to run a promotional campaign stating "we offer a discount of 60%" although the products offered with a 60% discount are almost out of stock (42.9%).
- o Just over three in ten retailers selling non-food products know a consumer is entitled to free repair or replacement of a new durable good which breaks down without any fault on his/her part 18 months after the purchase (33.2%).

Around four in ten retailers (41.9%) know a consumer who bought a good online, by mail or by phone has 14 days from receipt of the good to change his/her mind and cancel the order.

Most retailers in EU27_2019 think non-food products are safe, and only around one third report product withdrawals or public safety warnings

Almost three quarters of retailers (74.8%) think non-food products are safe.

Seven in ten retailers (70.8%) agree most environmental claims made about goods or services in their sector are reliable.

More than one third of all retailers (34.8%) say public warnings on product safety by public authorities have taken place in their sector in the last 24 months.

One third of companies (36.6%) say product withdrawals by public authorities have taken place in their sector in the last 24 months.

Less than three in ten have come across unfair commercial practices by competitors in their own country, and the majority are positive about compliance with consumer legislation

Retailers in EU27_2019 are much more likely to have come across unfair commercial practices by competitors in their own country (29.6%) than in other EU countries (6.4%) in the last 12 months.

Retailers are most likely to have come across domestic competitors pressuring consumers with persistent commercial calls or messages (42.8%), writing fake reviews which are in fact hidden adverts or hidden attacks (37.1%), or competitors advertising falsely that a product is available only for a limited period (36.7%).

No more than 10% of the retailers that sell cross-border have experienced each unfair commercial practices from a competitor in another EU country, with the most common being writing fake reviews that are in fact hidden adverts or hidden attacks on competitors (9.9%).

The majority of retailers agree it is easy to comply with consumer legislation in their sector in their own country (70.2%), that the costs of compliance with consumer legislation in their sector are reasonable (66.7%) and that their competitors comply with consumer legislation in their own country (66.1%).

For retailers that sell to other EU countries, 57.1% agree it is easy to comply with consumer legislation for their sector in other EU countries, 52.0% agree costs related to compliance with consumer legislation are reasonable in other EU countries and 50.8% agree companies competing with them in other EU countries comply with consumer legislation.

Nearly three quarters of companies (73.6%) agree public authorities actively monitor and ensure compliance with product safety legislation in their sector, 65.5% agree public authorities actively monitor and ensure compliance with consumer legislation in their sector. Six in ten (57.8%) agree consumer NGOs actively monitor compliance with consumer legislation and 56.1% agree self-regulatory bodies actively monitor respect of codes of conduct or codes of practice in their sector. Almost half of all companies (47.5%) agree the media regularly report on businesses which do not respect consumer legislation in their sector.

Almost four in ten retailers in EU27_2019 have received complaints from domestic consumers in the last 12 months, and a large majority of these were about the product itself

More than one third of retailers (35.1%) have received complaints from consumers in their own country in the past 12 months. Only 15.5% of retailers selling cross border received complaints from consumers located in other EU countries.

Complaints are much more likely to come via in-house customer service than via any other medium (from consumers located in their country: 23.9%, from consumers located in other EU countries: 11.0%).

Retailers are most likely to say complaints from consumers in their own country were about the product (79.1%), while just over one quarter say complaints were about late or non-delivery (27.2%).

For retailers selling in other EU countries, complaints received from consumers in other EU countries are most likely to have been about the product (80.8%), while 21.7% say complaints were received about late or no delivery.

Just over half of all companies (54.2%) are aware of ADR bodies, while just over three in ten (32.6%) participate in ADR mechanisms.

Four in ten retailers in EU27_2019 sell via mobile commerce or e-commerce

More than half of all retailers (53.1%) are currently engaged in distance selling, with e-commerce (37.8%), mobile commerce (18.4%) and telesales (17.9%) the three most common methods.

- o Overall, four in ten retailers sell via e-commerce or mobile commerce (41.5%).

More than one third of retailers (36.4%) sell online to final consumers in their country, 13.7% sell online to consumers in non-EU countries and 13.6% to those in other EU countries.

Almost all companies that currently sell online plan to continue to do so over the next 12 months (91.8%), while 18.4% of those that do not currently sell online are interested in doing so in the next 12 months.

Just over half of all retailers (55.5%) are confident to sell online.

For retailers that currently sell online, the most important obstacles to the development of online sales to other EU countries are differences in national tax regulations (38.1%), the higher risk of fraud and non-payments (36.6%) or differences in national consumer protection rules (34.8%).

For retailers that do not sell online, the most important obstacles to developing online sales are the nature of their business (46.5%), additional consumer protection rules (44.8%), while mention a higher risk of fraud and non-payment (38.8%).

More than seven in ten companies (71.0%) only sell to consumers in their own country, while one quarter (27.7%) sells to consumers in at least one other EU country. In all countries, the majority of retailers only sell to consumers in their own country.

More than half of retailers (54.7%) say 0%-10% of their total sales to final consumers are cross-border sales to consumers in other EU Member States.

Most retailers (53.4%) only sell in their country's language. Almost one quarter of retailers (24.6%) sell in two languages, while less than one in ten sells in three (10.4%) or in four or more languages (10.4%).

DETAILED RESULTS

1. Knowledge and Trust

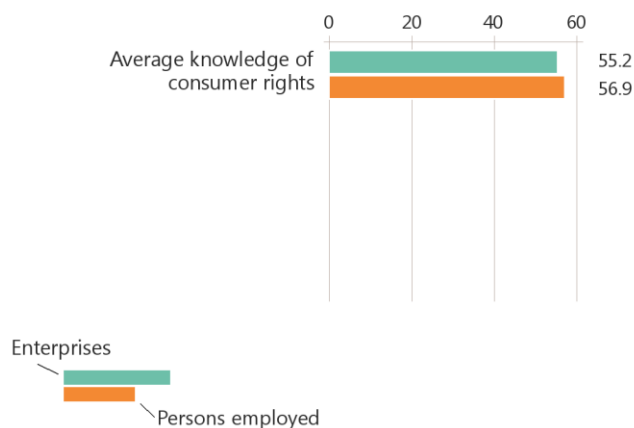
The first part of this report investigates retailers' knowledge about the rights of consumers in areas including guarantees for faulty products, the use of premium rate numbers and the promotion of products to children. Retailers' trust in products, as well as their trust in environmental claims made about products will also be discussed.

1.1. Retailers' knowledge of consumer rights

Retailers in EU27_2019 were asked about their knowledge of consumer rights in the following areas: faulty product guarantees, promoting products for children, using premium rate phone numbers for free products, including invoices for payment in marketing material, and running discount promotions with insufficient stock. An indicator called "Retailers' knowledge of consumers rights" was created by calculating the average number of correct answers to five questions at country level, each question covering one of these areas. A score of 0% in this indicator means none of the answers are correct, while a score of 100% means all the answers to all five questions are correct.

Overall, on average, just above half of the answers are correct (55.2%). The result is slightly higher when looking at the figures weighted by the total number of people employed by the companies that responded (56.9%).

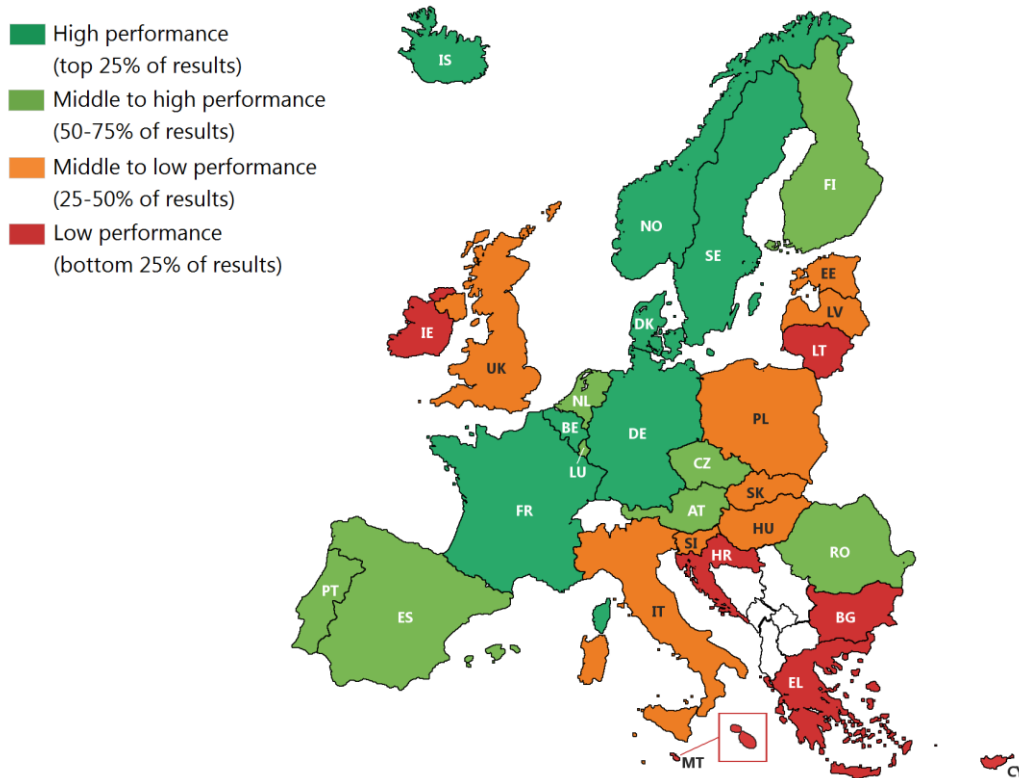
Kc_r Retailers' knowledge of consumer rights
(% - EU27_2019)



*Base: All retailers in EU27_2019 (N=9796) for four questions composing the indicator
Retailers in EU27_2019 selling non-food products (N=4061) for one of the questions
composing the indicator*

The map below illustrates that average knowledge of consumer rights in the five areas asked about is lower in the eastern regions of EU27_2019, compared to those in other regions. The exception is represented by Romania, where average knowledge is middle to high (50-75%).

Kc_r Retailers' knowledge of consumer rights
(AVERAGE KNOWLEDGE OF CONSUMER RIGHTS)



































*Base: All retailers (N=10747) for four questions composing the indicator
Retailers selling non-food products (N=4542) for one of the questions composing the indicator*

Within the EU27_2019, the highest average knowledge of consumer rights is observed in Belgium (61.5%) and Germany (60.9%), while the lowest can be found in Croatia (37.8%), Lithuania (38.5%) and Bulgaria (38.7%). The highest level of knowledge of any country in the study is observed in Iceland (64.0%).

There has been no change since 2016 at EU27_2019 level. At a country level, the largest increase in retailers' average knowledge of consumer rights is seen amongst companies in the Czech Republic (+5.7 pp), and the largest declines amongst those in Latvia (-7.9 pp), Estonia (-7.7 pp) and Cyprus (-7.4 pp).

Kc_r Retailers' knowledge of consumer rights
(AVERAGE KNOWLEDGE OF CONSUMER RIGHTS)

		2018	2018-2016	2016-2014
EU27_2019		55.2	=	▼ 1.2
EU28		53.6	▲ 0.1	▼ 0.8
REGION NORTH		52.9	▼ 1.7	▼ 2.1
REGION SOUTH		53.0	▲ 2.2	▼ 3.6
REGION EAST		48.6	▲ 0.3	▼ 1.8
REGION WEST		58.9	▼ 0.7	▼ 0.2
BE		61.5	▲ 1.7	▲ 2.1
BG		38.7	▼ 1.6	▼ 2.8
CZ		54.1	▲ 5.7	▼ 0.6
DK		57.7	▲ 1.1	▼ 4.4
DE		60.9	▼ 1.4	▼ 1.0
EE		47.1	▼ 7.7	▲ 5.7
IE		42.0	▼ 3.3	▼ 1.3
EL		42.9	▲ 2.8	▼ 9.9
ES		55.2	▲ 4.6	▼ 3.6
FR		57.0	▼ 0.9	▼ 1.0
HR		37.8	▲ 1.6	▲ 0.2
IT		53.5	▲ 1.0	▼ 4.2
CY		39.9	▼ 7.4	▲ 14.1
LV		43.9	▼ 7.9	▲ 5.1
LT		38.5	▼ 1.0	▼ 6.6
LU		54.7	▲ 3.7	▼ 2.8
HU		43.7	▼ 6.2	▼ 4.5
MT		41.3	▼ 5.0	▼ 11.0
NL		56.3	▲ 0.6	▲ 0.4
AT		55.6	▼ 1.7	▲ 2.5
PL		49.3	▼ 0.2	▼ 1.1
PT		55.5	▲ 1.3	▲ 0.9
RO		55.6	▲ 0.7	▼ 1.4
SI		46.0	▼ 1.3	▼ 4.3
SK		47.3	▲ 2.2	▼ 3.0
FI		56.5	▲ 0.6	▼ 1.2
SE		57.1	▼ 4.4	▼ 1.6
IS		64.0	▲ 6.5	▼ 2.2
NO		57.8	▲ 3.7	▼ 2.9
UK		44.0	▲ 0.4	▲ 2.0

*Base: All retailers (N=10747) for four questions composing the indicator
 Retailers selling non-food products (N=4542) for one of the questions composing the
 indicator*

A review of company characteristics shows that retailers in the trade sector have slightly better knowledge of consumer rights than those in the services sector (56.6% vs 53.9%). In addition, the longer the company has been established, the better their knowledge. For instance, the average for companies established before 1990 is 57.6%, compared to 52.8% for those established in 2000 or later.

Results for each of the five areas are presented in detail in the following sections.

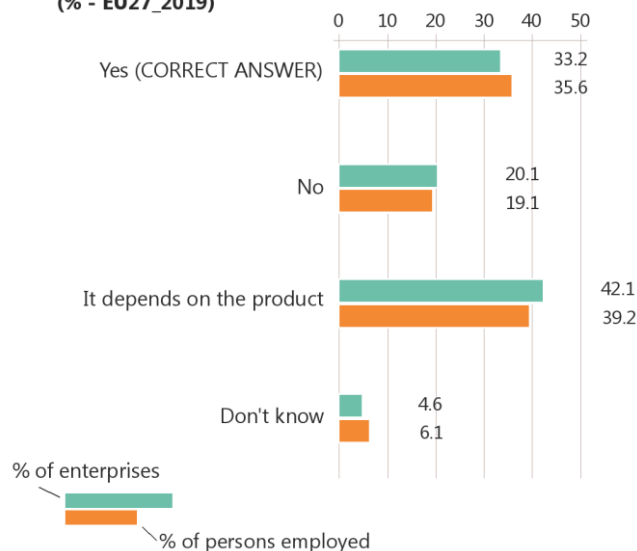
a) Knowledge on faulty product guarantees

- One third of retailers selling non-food products know the rights of consumers in relation to defective durable goods -

The first question relates to **faulty product guarantees**. Just over one third of retailers in EU27_2019 that sell non-food products (33.2%) know **a consumer is entitled to free repair or replacement of a new durable good which breaks down without any fault on his/her part 18 months after the purchase**. This represents 35.6% of the total persons employed at the companies surveyed.

More than six in ten retailers (62.2%) answer incorrectly: 42.1% say entitlement depends on the product, while 20.1% say a consumer does not have the right to free repair or replacement in this scenario. Finally, almost one in twenty retailers (4.6%) do not know what the consumer’s rights are in this situation⁸.

Q5 Imagine that a consumer bought a durable good new 18 months ago and it breaks down without any fault on his part. He didn't buy or benefit from any extended commercial guarantee. Does he have the right to have it repaired or replaced for free?
(% - EU27_2019)



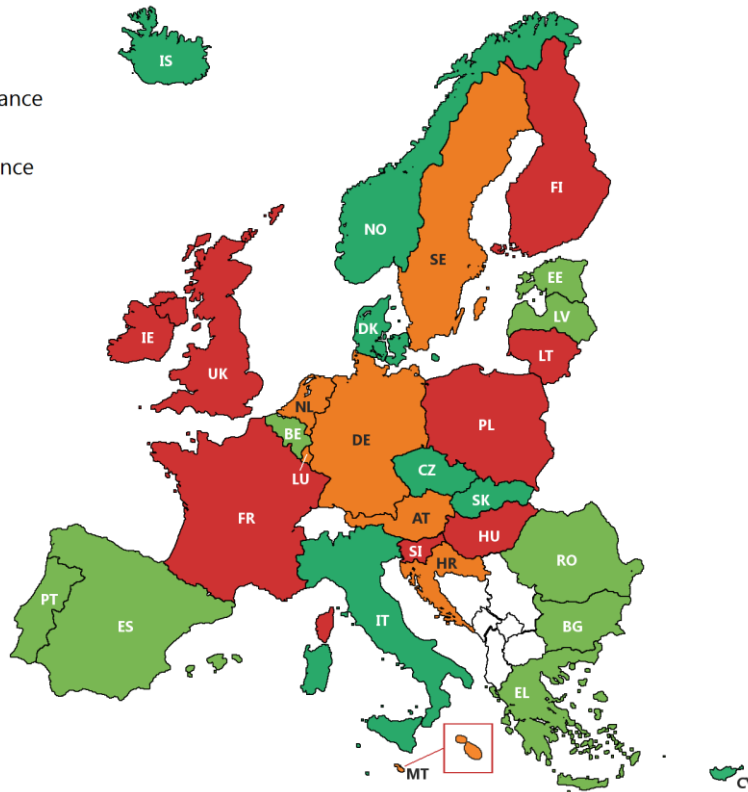
Base: All retailers in EU27_2019 which sell non-food products (N=4061)

⁸ All results in this report are presented with one decimal. In the case of single answer questions, results are rounded, in order for the sum of individual answers not to exceed 100%.

Countries in the southern (44.3%) and eastern (35.2%) regions are more likely to know the consumer has the right to a free repair or replacement in this situation than those in EU27_2019 overall. There is no difference between the western and northern regions and EU27_2019 overall.

Q5 Imagine that a consumer bought a durable good new 18 months ago and it breaks down without any fault on his part. He didn't buy or benefit from any extended commercial guarantee. Does he have the right to have it repaired or replaced for free?
(% - YES)

- High performance (top 25% of results)
- Middle to high performance (50-75% of results)
- Middle to low performance (25-50% of results)
- Low performance (bottom 25% of results)



Base: All retailers which sell non-food products (N=4542)

Retailers selling non-food products in the Czech Republic (59.1%), Denmark (55.2%) and Italy (49.7%) in EU27_2019, as well as those in Iceland (61.0%) are the most likely to give the **correct answer**. In contrast, fewer than one in five of these companies in Slovenia (13.0%), Finland (14.9%) and Hungary (20.6%) are aware of the consumer's rights in this situation.

Companies selling non-food products in Germany (29.2%), Finland (24.3%) and Lithuania (21.3%) are the most likely to think **a consumer doesn't have the right to have repaired or replaced for free a durable good bought new 18 months ago** (incorrect). In comparison, just 3.3% of these companies in the Czech Republic, 7.5% in Romania and 7.9% in Malta give this answer.

In seven countries more than half of these companies think **the consumer's rights depends on the product** (incorrect), with those in Slovenia (62.9%), Luxembourg (55.9%) and Hungary (55.3%) the most likely to say this. This compares to 27.1% in Denmark, 29.6% in Cyprus and 32.9% in the Czech Republic.

More than one in five of these companies in Ireland (21.1%), followed by 16.0% in Malta and 12.5% in Sweden say they **do not to know** the consumer's rights in this situation, compared to a small minority in Germany (1.5%), Luxembourg (3.2%) and the Netherlands (3.6%).

Comparing the current results to those from 2016 shows the proportion of retailers selling non-food products in EU27_2019 aware of consumers' right to have such a good repaired or replaced for free has decreased (-2.6 pp). There have been increases in the proportion who say the consumer does not have this right (+1.8 pp), that it depends on the product (+2.4) or that say they don't know (+3.4 pp).

Within EU27_2019, the largest increase since the previous survey in the proportion of companies that give the **correct answer** is seen amongst retailers in Italy (+15.9 pp). The largest decreases have been recorded amongst retailers in Malta (-32.0 pp), Estonia (-14.7 pp), Sweden (-13.7 pp) and Germany (-11.2 pp).

Retailers in Germany are now more likely to say a consumer **doesn't have the right** to a free repair or replacement, compared to 2016 (+9.6 pp), while those in Slovenia (-15.8 pp) and Romania (-11.1 pp) are now less likely to do so.

Since the last wave, there have been increases in 9 EU27_2019 countries in the proportion of retailers that think **it depends on the product**, as well as in Norway. The largest increase is observed amongst those in Slovenia (+25.4 pp). Ireland is the only country where there has been a decline in the proportion of companies giving this answer (-16.2 pp).

In four EU27_2019 countries, and most notably in Ireland (15.3 pp), companies selling non-food products are now more likely to say they **do not know**. The opposite is true in Germany (-4.4 pp).

Q5 Imagine that a consumer bought a durable good new 18 months ago and it breaks down without any fault on his part. He didn't buy or benefit from any extended commercial guarantee. Does he have the right to have it repaired or replaced for free?
(%)

		Yes			No			It depends on the product			Don't know		
		2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014
EU27_2019		33.2	▼ 2.6	▼ 1.6	20.1	▲ 1.0	▲ 1.8	42.1	▲ 2.4	▼ 3.6	4.6	▼ 0.8	▲ 3.4
EU28		31.2	▼ 2.1	▼ 1.8	21.0	▲ 0.8	▲ 2.4	41.8	▲ 0.8	▼ 3.1	6.0	▲ 0.5	▲ 2.5
REGION NORTH		33.4	▼ 6.7	▼ 3.2	15.6	▲ 0.8	▼ 0.5	41.7	▲ 7.3	▼ 0.6	9.3	▼ 1.4	▲ 4.3
REGION SOUTH		44.3	▲ 7.9	▼ 7.7	11.5	▼ 6.1	▲ 7.6	38.3	▼ 5.7	▼ 0.3	5.9	▲ 3.9	▲ 0.4
REGION EAST		35.2	▼ 0.3	▼ 2.4	10.7	▼ 6.5	▲ 2.0	47.6	▲ 8.4	▼ 5.2	6.5	▼ 1.6	▲ 5.6
REGION WEST		29.6	▼ 5.6	▲ 2.1	25.4	▲ 4.7	▼ 1.2	41.8	▲ 2.7	▼ 4.8	3.2	▼ 1.8	▲ 3.9
BE		40.0	▲ 3.6	▼ 0.6	12.0	▼ 4.0	▲ 5.7	41.8	▼ 0.6	▼ 7.0	6.2	▲ 1.0	▲ 1.9
BG		34.8	▲ 5.8	▼ 14.2	11.4	▼ 9.5	▲ 2.0	47.1	▲ 5.4	▲ 7.1	6.7	▼ 1.7	▲ 5.1
CZ		59.1	▲ 4.0	▲ 6.3	3.3	▼ 6.5	▲ 4.2	32.9	▲ 4.6	▼ 13.5	4.7	▼ 2.1	▲ 3.0
DK		55.2	▼ 8.9	▲ 0.6	9.5	▼ 0.7	▼ 2.9	27.1	▲ 13.7	▼ 5.4	8.2	▼ 4.1	▲ 7.7
DE		31.1	▼ 11.2	▲ 2.6	29.2	▲ 9.6	▼ 2.2	38.2	▲ 6.0	▼ 5.4	1.5	▼ 4.4	▲ 5.0
EE		38.3	▼ 14.7	▲ 5.1	8.7	▼ 3.0	▼ 2.2	44.1	▲ 20.7	▼ 9.5	8.9	▼ 3.0	▲ 6.6
IE		21.1	▲ 1.7	▼ 6.1	20.4	▼ 0.8	▼ 1.4	37.4	▼ 16.2	▲ 3.3	21.1	▲ 15.3	▲ 4.2
EL		35.3	=	▲ 1.2	12.9	▲ 2.8	▼ 0.3	45.3	▼ 4.8	▼ 4.1	6.5	▲ 2.0	▲ 3.2
ES		40.5	▲ 5.8	▼ 5.4	11.8	▼ 8.5	▲ 3.2	41.2	▼ 2.5	▲ 2.7	6.5	▲ 5.2	▼ 0.5
FR		23.4	▲ 4.0	▼ 3.8	21.1	▼ 5.5	▼ 1.2	51.1	▼ 0.8	▲ 3.5	4.4	▲ 2.3	▲ 1.5
HR		28.2	▲ 6.6	▼ 1.2	16.5	▼ 5.5	▲ 0.3	48.3	▼ 3.3	▼ 2.1	7.0	▲ 2.2	▲ 3.0
IT		49.7	▲ 15.9	▼ 14.0	10.2	▼ 8.0	▲ 13.2	35.3	▼ 11.5	▲ 0.8	4.8	▲ 3.6	=
CY		46.2	▼ 11.2	▲ 17.0	16.6	▼ 13.0	▲ 23.9	29.6	▲ 23.0	▼ 30.9	7.6	▲ 1.2	▼ 10.0
LV		38.7	▼ 7.4	▲ 5.3	9.1	▲ 1.1	▼ 6.0	43.6	▲ 5.8	▼ 1.1	8.6	▲ 0.5	▲ 1.8
LT		24.6	▼ 2.9	▼ 3.6	21.3	▼ 2.5	▲ 5.2	46.0	▲ 2.1	▼ 0.9	8.1	▲ 3.3	▼ 0.7
LU		28.7	▼ 2.2	▼ 9.6	12.2	▼ 9.3	▲ 17.4	55.9	▲ 17.9	▼ 17.3	3.2	▼ 6.4	▲ 9.5
HU		20.6	▲ 2.3	▼ 4.5	13.4	▼ 3.9	▼ 5.6	55.3	▲ 6.2	▼ 1.2	10.7	▼ 4.6	▲ 11.3
MT		32.2	▼ 32.0	▼ 0.5	7.9	▼ 0.9	▼ 2.0	43.9	▲ 20.9	▼ 1.8	16.0	▲ 12.0	▲ 4.3
NL		29.7	▼ 5.7	▲ 0.9	14.8	▲ 0.5	▲ 1.9	51.9	▲ 7.0	▼ 5.5	3.6	▼ 1.8	▲ 2.7
AT		30.9	▼ 1.5	▲ 2.3	19.5	▼ 6.4	▲ 3.8	45.2	▲ 9.0	▼ 7.5	4.4	▼ 1.1	▲ 1.4
PL		24.9	▼ 7.7	▲ 5.7	14.3	▼ 3.2	▲ 1.8	53.9	▲ 12.2	▼ 13.7	6.9	▼ 1.3	▲ 6.2
PT		40.8	▼ 9.2	▲ 0.1	14.1	▲ 2.5	▲ 7.7	37.7	▲ 4.5	▼ 10.5	7.4	▲ 2.2	▲ 2.7
RO		40.7	▲ 0.9	▼ 9.4	7.5	▼ 11.1	▲ 4.9	46.4	▲ 12.0	▼ 1.2	5.4	▼ 1.8	▲ 5.7
SI		13.0	▲ 8.2	▼ 3.6	20.1	▼ 15.8	▲ 16.6	62.9	▲ 25.4	▼ 14.4	4.0	▼ 1.4	▲ 1.4
SK		46.1	▼ 2.0	▼ 4.2	9.2	▲ 2.2	▼ 3.0	39.7	=	▲ 5.0	5.0	▼ 0.2	▲ 2.2
FI		14.9	▲ 1.8	▲ 5.1	24.3	▲ 5.3	▼ 2.3	54.2	▼ 8.6	▼ 9.1	6.6	▲ 1.5	▲ 6.3
SE		28.6	▼ 13.7	▼ 1.8	16.0	▲ 2.0	▲ 0.8	42.9	▲ 15.9	▼ 0.4	12.5	▼ 4.2	▲ 1.4
IS		61.0	▲ 10.1	▲ 3.5	18.2	▼ 6.1	▲ 10.3	13.9	▲ 4.4	▼ 20.8	6.9	▼ 8.4	▲ 7.0
NO		48.0	▼ 2.1	▼ 5.1	7.6	▼ 1.5	▲ 1.5	38.6	▲ 13.4	▼ 7.0	5.8	▼ 9.8	▲ 10.6
UK		19.1	▲ 1.8	▼ 5.3	26.3	▼ 1.2	▲ 7.1	39.8	▼ 9.1	▲ 0.6	14.8	▲ 8.5	▼ 2.4

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers which sell non-food products (N=4542)

The analysis of company characteristics⁹ shows companies that give the **correct answer** are more likely to:

- o have 250 or more employees (39.6%);
- o be retailers where the respondent is a marketing manager (40.7%);
- o They are less likely to be in the service sector (29.9%).

Retailers that are **not aware of the consumer's rights** in this scenario are most likely to:

- o have 10-49 employees (62.7%);
- o belong to sector L – real estate activities (69.2%);
- o be retailers where the respondent is a general manager (66.8%).

b) Knowledge of authorized or prohibited commercial practices

The remaining four questions used to compile the index relate to retailers' knowledge about authorised or prohibited commercial practices are discussed below.

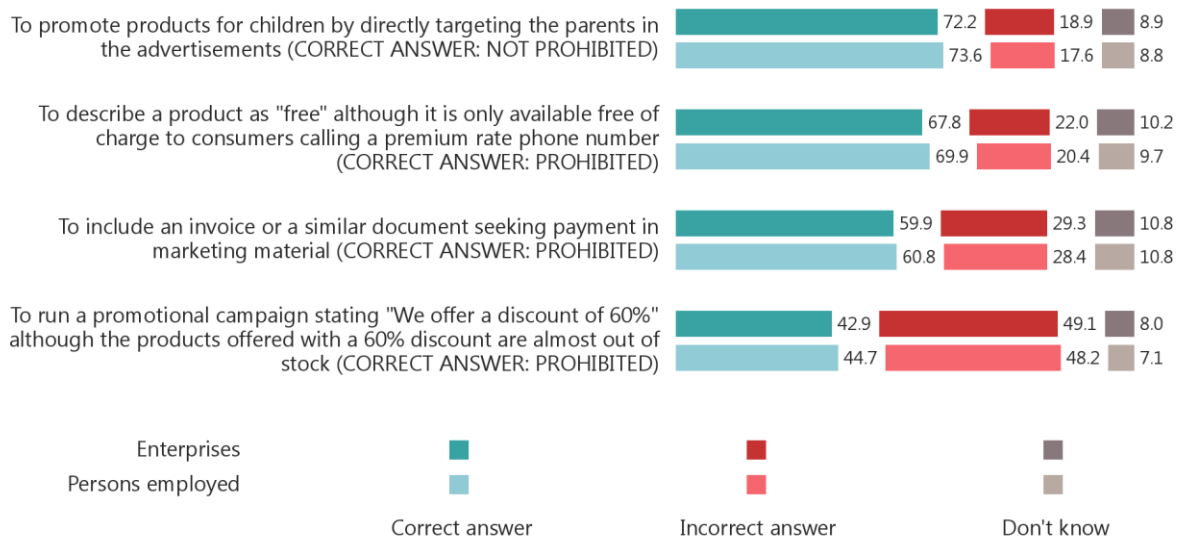
- Only 15.4% of retailers in EU27_2019 provide correct responses to all 4 of the commercial practices asked about -

Retailers in EU27_2019 are most likely to know it is not prohibited **to promote products for children by directly targeting the parents in the advertisements** (72.2%). More than two thirds (67.8%) know it is prohibited **to describe a product as "free" although it is only available free of charge to consumers calling a premium rate phone number**, while almost six in ten (59.9%) know it is prohibited **to include an invoice or a similar document seeking payment in marketing material**. However, only a minority of retailers (42.9%) are aware that it is prohibited **to run a promotional campaign stating "we offer a discount of 60%" although the products offered with a 60% discount are almost out of stock**.

For each of these four practices, around one in ten retailers say they do not know whether the practice is prohibited or not.

⁹ For all of the analyses in this report the results for NACE service sector D – Electricity, gas, steam and air conditioning supply will not be discussed due to very low base size (n=5-20, depending on the question).

Q6 I will read 4 statements concerning legislation in (OUR COUNTRY) related to commercial practices. Some of them are prohibited and some are not. For each statement, please tell me if you think it is prohibited or not?
(% - EU27_2019)



Base: All retailers in EU27_2019 (N=9796)

Retailers in the western region (74.0%) are more likely to know **promoting products for children by directly targeting the parents in the advertisements** is not prohibited compared to EU27_2019. Those in the eastern region (64.9%) are less likely to know this practice is not prohibited, compared to EU27_2019. There is no difference between EU27_2019 and the northern or southern regions.

Companies in the western (73.9%) and northern (68.7%) regions are more likely to know that it is prohibited **to describe a product as "free" although it requires calling a premium rate phone number**, compared to EU27_2019. Those in the eastern (58.9%) and southern (60.1%) regions are less likely to know this.

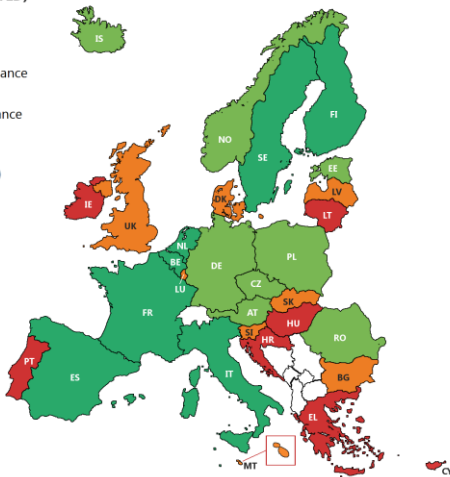
Companies in the western region (68.4%) are more likely to know it is prohibited **to include an invoice or a similar document seeking payment in marketing material**, compared to EU27_2019. Those in the eastern (49.7%) and southern (48.7%) regions are less likely to know this is prohibited. There is no difference between EU27_2019 and the northern region.

Retailers in the western region (48.7%) are more likely to know it is prohibited **to run a promotional campaign offering a discount when the discounted product is almost out of stock**, compared to EU27_2019 overall. Those in the northern (33.3%), eastern (34.2%) and southern (39.0%) regions are less likely to know this than retailers in EU27_2019 as a whole.

Q6.3 I will read 4 statements concerning legislation in (OUR COUNTRY) related to commercial practices. Some of them are prohibited and some are not. For each statement, please tell me if you think it is prohibited or not?

To promote products for children by directly targeting the parents in the advertisements
(% - NOT PROHIBITED)

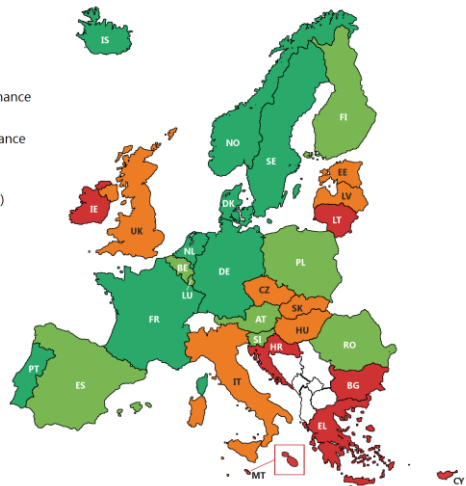
- High performance (top 25% of results)
- Middle to high performance (50-75% of results)
- Middle to low performance (25-50% of results)
- Low performance (bottom 25% of results)



Q6.4 I will read 4 statements concerning legislation in (OUR COUNTRY) related to commercial practices. Some of them are prohibited and some are not. For each statement, please tell me if you think it is prohibited or not?

To describe a product as "free" although it is only available free of charge to consumers calling a premium rate phone number
(% - PROHIBITED)

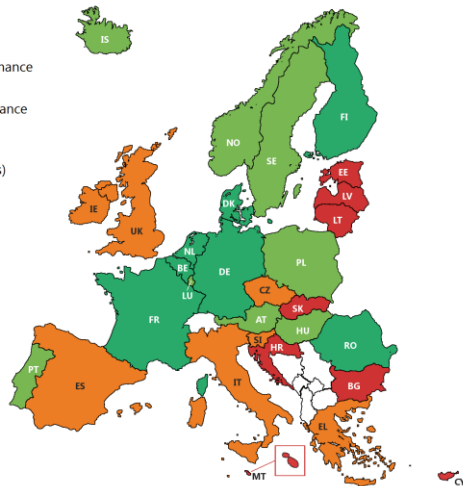
- High performance (top 25% of results)
- Middle to high performance (50-75% of results)
- Middle to low performance (25-50% of results)
- Low performance (bottom 25% of results)



Q6.1 I will read 4 statements concerning legislation in (OUR COUNTRY) related to commercial practices. Some of them are prohibited and some are not. For each statement, please tell me if you think it is prohibited or not?

To include an invoice or a similar document seeking payment in marketing material
(% - PROHIBITED)

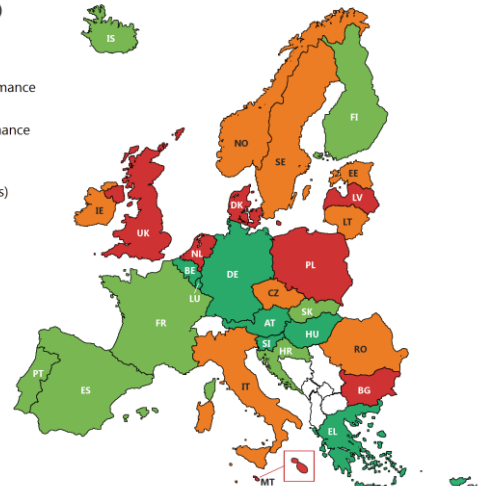
- High performance (top 25% of results)
- Middle to high performance (50-75% of results)
- Middle to low performance (25-50% of results)
- Low performance (bottom 25% of results)



Q6.2 I will read 4 statements concerning legislation in (OUR COUNTRY) related to commercial practices. Some of them are prohibited and some are not. For each statement, please tell me if you think it is prohibited or not?

To run a promotional campaign stating "We offer a discount of 60%" although the products offered with a 60% discount are almost out of stock
(% - PROHIBITED)

- High performance (top 25% of results)
- Middle to high performance (50-75% of results)
- Middle to low performance (25-50% of results)
- Low performance (bottom 25% of results)



Base: All retailers (N=10747)

More than eight in ten retailers in Finland (88.1%), the Netherlands (84.9%), Italy (81.7%) and Sweden (81.4%) know it is **not prohibited to promote products for children by directly targeting the parents in the advertisements**. The lowest proportions of retailers that are aware this is not prohibited are seen amongst retailers in Cyprus (35.1%), Hungary (40.7%) and Greece (44.3%).

Since the last survey in 2016, there has been a decrease in knowledge at EU27_2019 level (-5.0 pp). At country level, the largest increase in the proportion of companies that know that it is **not prohibited to promote products for children by targeting the parents** is seen amongst those in Malta (+11.6 pp), while the largest decrease is recorded in Hungary (-14.9 pp).

Q6.3 I will read 4 statements concerning legislation in (OUR COUNTRY) related to commercial practices. Some of them are prohibited and some are not. For each statement, please tell me if you think it is prohibited or not?

To promote products for children by directly targeting the parents in the advertisements
(% - NOT PROHIBITED)

		2018	2018-2016	2016-2014
EU27_2019		72.2	▼ 5.0	▼ 0.2
EU28		71.0	▼ 4.0	▼ 0.1
REGION NORTH		71.6	▼ 3.9	▼ 1.0
REGION SOUTH		73.0	▼ 2.4	▼ 1.0
REGION EAST		64.9	▼ 5.4	▼ 3.9
REGION WEST		74.0	▼ 6.7	▲ 1.2
BE		78.0	▼ 3.3	=
BG		62.7	▼ 2.8	▼ 7.9
CZ		74.8	▲ 1.6	▼ 3.4
DK		57.7	▼ 3.2	▼ 5.5
DE		73.4	▼ 7.7	▲ 1.7
EE		68.6	▼ 10.6	▲ 7.2
IE		50.7	▼ 5.2	▼ 4.3
EL		44.3	▲ 2.1	▼ 10.8
ES		77.4	▼ 4.8	▼ 1.3
FR		78.8	▼ 5.0	▲ 0.6
HR		48.3	▼ 5.0	▲ 3.9
IT		81.7	▼ 0.1	▲ 3.6
CY		35.1	▲ 0.2	▼ 6.4
LV		66.8	▼ 11.6	▼ 1.7
LT		51.1	▼ 7.6	▼ 7.0
LU		63.0	▼ 1.1	▼ 3.9
HU		40.7	▼ 14.9	▼ 19.3
MT		64.1	▲ 11.6	▼ 11.2
NL		84.9	▲ 1.2	▼ 3.5
AT		67.8	▼ 10.7	▲ 10.0
PL		72.2	▼ 4.6	▼ 5.0
PT		52.6	▼ 1.2	▼ 10.2
RO		70.9	▼ 6.6	▲ 4.2
SI		63.9	▼ 0.2	▲ 5.1
SK		61.4	▼ 2.8	▼ 6.5
FI		88.1	▼ 1.2	▼ 2.3
SE		81.4	▼ 2.2	▼ 1.9
IS		70.6	▲ 9.7	▼ 10.9
NO		69.8	▲ 5.1	▼ 8.4
UK		63.6	▲ 1.8	▲ 2.6

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

































Retailers in Denmark (78.4%), Sweden (76.6%) and France (76.5%) in EU27_2019, as well as those in Iceland (83.0%), are the most likely to know **it is prohibited to describe a product as "free" although it is only available free of charge to consumers calling a premium rate phone number**. Those in Cyprus (36.9%), Croatia (46.5%) and Greece (46.7%) are the least likely to know this, although this still represents more than one third of companies.

Compared to 2016, retailers in EU27_2019 are now more likely to know this is prohibited (+1.9 pp). At country level, the largest increase in awareness is observed amongst retailers in Spain (+10.4 pp). Hungary is the only country where there has been a decrease (-11.8 pp).

Q6.4 I will read 4 statements concerning legislation in (OUR COUNTRY) related to commercial practices. Some of them are prohibited and some are not. For each statement, please tell me if you think it is prohibited or not?

To describe a product as "free" although it is only available free of charge to consumers calling a premium rate phone number

(% - PROHIBITED)

	2018	2018-2016	2016-2014	2014-2012	2012-2011	2011-2010	2010-2009
EU27_2019 	67.8	▲ 1.9	▼ 2.1	▼ 0.8	▲ 5.0	▲ 1.2	▲ 0.5
EU28 	66.2	▲ 1.7	▼ 1.0	▼ 1.9	▲ 5.0	▲ 0.5	▲ 0.8
REGION NORTH	68.7	▲ 2.0	▼ 3.1	▼ 4.5	▲ 1.3	▲ 3.7	▲ 1.5
REGION SOUTH	60.1	▲ 2.6	▼ 3.5	▼ 2.2	▲ 6.9	▼ 0.5	▼ 4.5
REGION EAST	58.9	▲ 2.9	▼ 1.8	▼ 1.5	▲ 0.8	▼ 0.2	▲ 7.4
REGION WEST	73.9	▲ 1.0	▼ 2.5	▲ 0.9	▲ 6.1	▲ 1.7	▲ 1.3
BE 	70.3	▼ 1.8	▲ 5.8	▲ 0.1	▲ 0.9	▲ 2.5	▲ 9.2
BG 	47.9	▼ 3.7	▼ 0.4	▼ 7.8	▲ 3.1	▲ 2.7	▲ 29.1
CZ 	54.9	▲ 8.0	▼ 3.4	▲ 12.5	▼ 7.9	▼ 6.8	▲ 9.8
DK 	78.4	▲ 8.0	▼ 7.4	▲ 1.5	▼ 4.4	▲ 9.1	▼ 11.3
DE 	74.7	▲ 0.6	▼ 2.9	▼ 2.7	▲ 6.8	▼ 0.2	▲ 2.2
EE 	57.8	▼ 4.7	▲ 8.4	▼ 4.0	▲ 6.5	▼ 17.5	▲ 15.6
IE 	52.9	▼ 5.2	▼ 2.1	▲ 3.1	▼ 4.8	▲ 10.6	▼ 10.6
EL 	46.7	▲ 5.2	▼ 11.2	▲ 0.3	▲ 3.3	▼ 10.8	▲ 7.5
ES 	65.5	▲ 10.4	▼ 6.2	▼ 5.2	▲ 4.8	▲ 8.2	▼ 6.3
FR 	76.5	▼ 1.5	▼ 1.7	▲ 10.1	▲ 7.9	▼ 1.2	▼ 0.1
HR 	46.5	▲ 2.5	▲ 2.1	▼ 4.3	N.A	N.A	N.A
IT 	56.2	▼ 4.8	▼ 3.6	▲ 2.8	▲ 10.4	▼ 9.1	▼ 8.0
CY 	36.9	▼ 11.9	▲ 19.8	▼ 27.0	▲ 6.3	▼ 11.4	▲ 26.2
LV 	55.6	▼ 4.4	▲ 6.8	▼ 9.2	▲ 5.9	▲ 2.2	▲ 2.5
LT 	49.0	▲ 2.4	▼ 9.4	▼ 12.5	▲ 3.9	▲ 6.6	▲ 11.4
LU 	73.5	▲ 4.5	▲ 4.9	▼ 9.5	▲ 12.5	▼ 19.7	▲ 12.6
HU 	55.8	▼ 11.8	▲ 1.4	▼ 8.8	▼ 0.4	▲ 6.9	▼ 7.6
MT 	46.8	▲ 4.2	▼ 10.4	▼ 16.5	▼ 1.8	▼ 16.1	▲ 30.7
NL 	75.1	▲ 8.1	▼ 2.8	▼ 0.9	▲ 3.3	▲ 14.8	▲ 0.1
AT 	73.0	▲ 8.3	▼ 6.0	▼ 2.0	▲ 6.1	▲ 0.3	▲ 1.2
PL 	67.3	▲ 6.1	▼ 3.5	▼ 2.5	▲ 7.5	▲ 3.4	=
PT 	76.3	▲ 6.8	▲ 7.3	▼ 10.8	▲ 3.6	▲ 9.1	▲ 2.5
RO 	63.1	▲ 7.3	▼ 3.1	▼ 1.9	▲ 0.6	▼ 1.2	▲ 10.5
SI 	64.0	▲ 3.3	▼ 4.5	▼ 5.5	▲ 5.3	▼ 3.3	▲ 8.5
SK 	54.8	▲ 4.7	▼ 0.5	▲ 1.3	▲ 3.4	▼ 11.8	▲ 12.8
FI 	68.8	▲ 1.9	▼ 3.8	▼ 10.3	▲ 6.9	▼ 7.6	▲ 4.0
SE 	76.6	▼ 0.5	▼ 1.7	▼ 3.8	▲ 2.0	▲ 5.0	▲ 4.2
IS 	83.0	▲ 1.5	▲ 2.6	▼ 8.4	▲ 5.7	▲ 3.6	▲ 1.3
NO 	78.9	▲ 11.0	▼ 5.6	▼ 7.6	▲ 6.2	▲ 4.4	▼ 9.4
UK 	55.7	▼ 0.7	▲ 8.7	▼ 10.1	▲ 5.0	▼ 5.3	▲ 2.1

Results statistically significantly higher than EU results (T-test at 95% level)

Results statistically significantly lower than EU results (T-test at 95% level)

Statistically significant increase from one year to the other (T-test at 95% level)

Statistically significant decrease from one year to the other (T-test at 95% level)

































Base: All retailers (N=10747)

More than seven in ten retailers in Finland (73.1%), Germany (71.6%) and Denmark (71.0%) know it is **prohibited to include an invoice or a similar document seeking payment in marketing material**. At the other end of the scale, 23.3% in Croatia, 26.9% in Bulgaria and 31.5% in Latvia know this is prohibited.

There has been an increase in the proportion of EU27_2019 retailers that know this (+2.4 pp) compared to 2016, and this builds on the positive change since 2011. At an individual country level, the largest increase since 2016 is observed amongst retailers in Denmark (+10.4 pp). Latvia (-9.6 pp) and Estonia (-7.7 pp) are the only countries where there has been a decrease in awareness that this practice is prohibited.

Q6.1 I will read 4 statements concerning legislation in (OUR COUNTRY) related to commercial practices. Some of them are prohibited and some are not. For each statement, please tell me if you think it is prohibited or not?


To include an invoice or a similar document seeking payment in marketing material
(% - PROHIBITED)

	2018	2018-2016	2016-2014	2014-2012	2012-2011	2011-2010	2010-2009
EU27_2019 	59.9	▲ 2.4	▲ 1.1	▲ 3.4	▲ 1.3	▼ 1.3	▲ 5.1
EU28 	58.4	▲ 2.4	▲ 1.7	▲ 2.1	▲ 1.6	▼ 1.1	▲ 4.0
REGION NORTH	57.4	▲ 1.3	▼ 1.3	▼ 2.4	▲ 0.5	▲ 2.7	▲ 4.3
REGION SOUTH	48.7	▼ 0.2	▼ 2.0	▲ 11.2	▼ 0.9	=	▼ 5.6
REGION EAST	49.7	▲ 3.1	▲ 0.4	▲ 6.3	▼ 0.2	▼ 5.0	▲ 9.2
REGION WEST	68.4	▲ 3.3	▲ 2.2	▼ 0.9	▲ 3.4	▼ 2.3	▲ 10.4
BE 	66.7	▲ 4.4	▲ 4.5	▼ 6.5	▲ 2.8	▲ 11.6	▼ 7.0
BG 	26.9	▼ 1.4	▲ 4.7	▲ 3.5	▼ 1.6	▼ 1.4	▲ 16.0
CZ 	45.6	▲ 9.6	▲ 0.1	▼ 5.8	▼ 2.1	▼ 9.1	▲ 9.7
DK 	71.0	▲ 10.4	▼ 4.9	▼ 10.8	▲ 5.3	▲ 5.9	▼ 4.8
DE 	71.6	▲ 7.1	▲ 1.4	▼ 3.4	▲ 9.2	▼ 11.2	▼ 1.8
EE 	34.9	▼ 7.7	▲ 8.4	▲ 3.6	▼ 0.3	▼ 7.2	▼ 7.9
IE 	49.5	▼ 3.0	▲ 5.9	▼ 1.4	▼ 5.4	▲ 1.1	▲ 9.1
EL 	42.6	▲ 3.5	▼ 13.0	▲ 12.1	▲ 6.7	▼ 12.3	▼ 15.0
ES 	49.8	▲ 4.0	▼ 1.4	▲ 14.1	=	▲ 3.3	▼ 6.8
FR 	65.0	▼ 2.9	▼ 1.0	▲ 8.9	▼ 6.7	▲ 6.6	▲ 40.6
HR 	23.3	▼ 0.7	▼ 2.8	▲ 6.7	N.A	N.A	N.A
IT 	46.6	▼ 6.4	▼ 2.0	▲ 11.7	▼ 4.6	▼ 5.5	▲ 2.4
CY 	36.1	▲ 4.8	▲ 11.3	▼ 10.8	▲ 2.5	▼ 15.3	▼ 3.2
LV 	31.5	▼ 9.6	▲ 12.8	▼ 0.8	▲ 1.3	▲ 0.6	▲ 19.4
LT 	33.6	▲ 1.9	▼ 6.3	▲ 14.8	▲ 1.4	▲ 4.5	▼ 4.2
LU 	61.7	▲ 5.2	▼ 1.7	▼ 0.1	▼ 5.2	▼ 4.2	▲ 36.1
HU 	55.4	▼ 5.8	▼ 0.2	▼ 6.4	▲ 1.0	▲ 8.5	▲ 1.6
MT 	33.9	▲ 1.4	▼ 26.4	▼ 1.0	▲ 0.7	▼ 14.5	▲ 42.4
NL 	65.2	▼ 4.0	▲ 8.6	▼ 9.7	▲ 4.9	▲ 16.3	▼ 1.1
AT 	62.0	▼ 6.1	▲ 10.2	▼ 3.7	▲ 1.0	▼ 5.8	▼ 1.9
PL 	53.8	▲ 3.3	▼ 0.1	▲ 8.9	▲ 1.1	▼ 8.3	▲ 9.0
PT 	64.0	▲ 5.5	▲ 1.4	▼ 0.4	▲ 4.5	▲ 13.2	▼ 25.4
RO 	66.9	▲ 2.8	▲ 2.1	▲ 23.2	▲ 2.9	▼ 5.1	▲ 9.3
SI 	44.5	▼ 1.8	▼ 5.7	▲ 3.5	▲ 3.8	▲ 6.7	▼ 24.7
SK 	37.2	▲ 7.1	▼ 4.1	▼ 3.8	▲ 4.0	▼ 12.5	▲ 29.7
FI 	73.1	▲ 0.7	▲ 0.7	▼ 2.3	▼ 4.4	▲ 1.1	▲ 5.3
SE 	62.7	▼ 3.6	▼ 3.6	▼ 2.3	▼ 3.7	▼ 0.7	▲ 12.9
IS 	61.9	▲ 7.8	▼ 1.3	▼ 10.7	▼ 4.0	▲ 2.7	▲ 28.7
NO 	59.2	▲ 5.8	▲ 4.5	▼ 14.8	▲ 2.9	▲ 4.5	▼ 3.7
UK 	49.2	▲ 1.6	▲ 6.9	▼ 6.8	▲ 3.6	▼ 1.6	▼ 2.4

 Results statistically significantly higher than EU results (T-test at 95% level)

 Results statistically significantly lower than EU results (T-test at 95% level)

 Statistically significant increase from one year to the other (T-test at 95% level)

 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

Just over half of all retailers in Germany (53.7%) and Belgium (52.3%), as well as 46.8% in Luxembourg know **it is prohibited to run a promotional campaign stating "we offer a discount of 60%" although the products offered with a 60% discount are almost out of stock**. At the opposite end of the scale, retailers in Bulgaria (21.3%), Denmark (26.2%) and the Netherlands and Latvia (both 26.7%) are the least likely to know this is prohibited.

At an EU27_2019 level, there has been an increase in the proportion that know this practice is prohibited (+3.3 pp), reversing the trend between 2014 and 2016. Spain is the only country where there has been an increase in the proportion of companies that know this practice is prohibited (+7.8 pp). The largest decline is observed amongst retailers in Cyprus (-19.2 pp).

Q6.2 I will read 4 statements concerning legislation in (OUR COUNTRY) related to commercial practices. Some of them are prohibited and some are not. For each statement, please tell me if you think it is prohibited or not?

To run a promotional campaign stating "We offer a discount of 60%" although the products offered with a 60% discount are almost out of stock

(% - PROHIBITED)

		2018	2018-2016	2016-2014
EU27_2019		42.9	▲ 3.3	▼ 3.0
EU28		41.5	▲ 2.6	▼ 3.0
REGION NORTH		33.3	▼ 1.4	▼ 1.7
REGION SOUTH		39.0	▲ 3.5	▼ 4.1
REGION EAST		34.2	▲ 1.2	▼ 1.6
REGION WEST		48.7	▲ 4.4	▼ 3.9
BE		52.3	▲ 5.1	▲ 0.8
BG		21.3	▼ 6.0	▲ 3.8
CZ		36.1	▲ 5.2	▼ 2.7
DK		26.2	▼ 1.0	▼ 4.3
DE		53.7	▲ 4.1	▼ 7.5
EE		35.9	▼ 0.8	▼ 0.6
IE		35.9	▼ 4.9	▲ 0.2
EL		45.6	▲ 3.5	▼ 15.8
ES		42.7	▲ 7.8	▼ 3.7
FR		41.4	▲ 0.9	▲ 0.7
HR		42.7	▲ 4.4	▼ 1.2
IT		33.5	▲ 0.5	▼ 4.9
CY		45.1	▼ 19.2	▲ 29.1
LV		26.7	▼ 6.5	▲ 2.0
LT		34.1	▲ 1.4	▼ 6.8
LU		46.8	▲ 12.0	▼ 3.6
HU		46.1	▼ 0.8	=
MT		29.3	▼ 10.4	▼ 7.0
NL		26.7	▲ 3.7	▼ 0.8
AT		44.1	▲ 1.5	▼ 4.4
PL		28.2	▲ 2.1	▼ 2.4
PT		43.7	▲ 4.4	▲ 6.0
RO		36.4	▼ 1.0	▼ 0.9
SI		44.5	▲ 0.3	▼ 13.0
SK		36.8	▲ 4.0	▲ 0.5
FI		37.6	▼ 0.3	▼ 5.5
SE		36.3	▼ 2.1	▲ 0.8
IS		43.5	▲ 3.2	▼ 5.0
NO		33.0	▼ 1.3	▼ 0.3
UK		32.7	▼ 2.4	▼ 2.7

- Results statistically significantly higher than EU results (T-test at 95% level)
- Results statistically significantly lower than EU results (T-test at 95% level)
- Statistically significant increase from one year to the other (T-test at 95% level)
- Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

The analysis of company characteristics illustrates retailers that know it is not prohibited **to promote products for children by targeting the parents** are more likely to:

- o belong to sector K (79.1%) or J - Information and communication (77.5%), and less likely to belong to sector N (56.6%);
- o be companies where the respondent is a commercial or sales manager: 76.0%.

Companies that know it is prohibited **to include a document seeking payment in marketing material** are more likely to:

- o belong to sector N (68.3%) or sector J (66.8%), and less likely to belong to sector I (57.1%);
- o have 50-249 employees: 63.5%;
- o be the oldest companies (established before 1990): 62.0%;
- o be engaged in distance sales (61.9%) or online sales (62.4%);
- o sell non-food products: 62.7%;
- o be retailers where the respondent is a general manager: 63.6%.

Retailers that know it is prohibited **to run a promotional campaign offering discounts on items that are almost out of stock** are more likely to:

- o be in the trade sector (45.4%), or in services sector N (50.3%), sector K (49.0%) or sector L (48.5%) and less likely to belong to sector I (38.9%) or sector J (37.9%);
- o have 50-249 employees: 48.7%;
- o be the oldest companies (established before 1990): 48.3%;
- o be retailers where the respondent is a general manager: 46.5%.

Companies that know it is prohibited **to describe a product as "free" although it requires calling a premium rate phone number** are more likely to:

- o belong to the trade sector (69.7%), but less likely to belong to service sector J (60.6%);
- o have 50-249 employees: 71.7%;
- o be the oldest companies: 70.1%;
- o be retailers selling via distance (70.2%) and in particular via online sales (70.0%);
- o retailers selling non-food products (70.4%);
- o be where the respondent is a general manager: 70.8%.

c) Knowledge of cooling off period

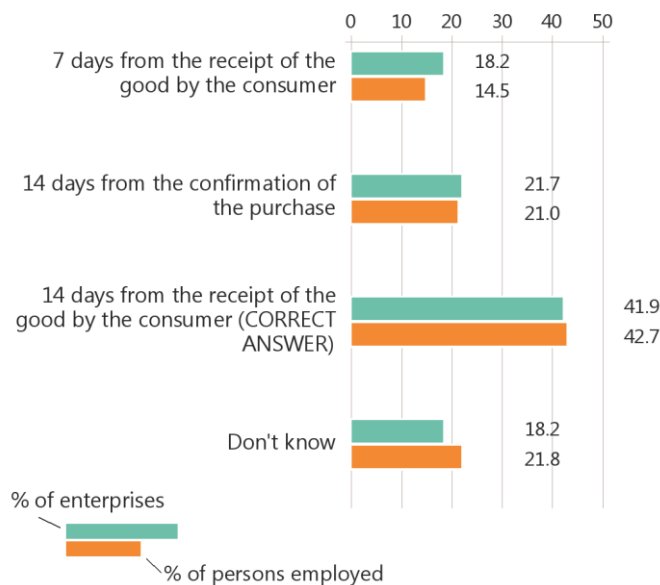
Retailers that sell non-food products online, by mail or by phone were asked about consumer’s rights when it comes to the cooling off period.

- Fewer than half of all retailers know consumers have 14 days to change their mind after receipt of the good -

Just over four in ten retailers in EU27_2019 (41.9%) correctly answer that a consumer who bought a good online, by mail or by phone **has 14 days from the receipt of the good to change their mind and cancel the order**. This represents 42.7% of the total persons employed by retailers in the survey.

Fewer than one in five companies in EU27_2019 (18.2%) incorrectly think the consumer can change their mind and cancel the order for **7 days from the receipt of the item**. Just over one in five retailers (21.7%) think the consumer can cancel the order for **14 days from the confirmation of the purchase**, which is also incorrect. Almost one in five companies (18.2%) do not know the consumer’s rights in this situation.

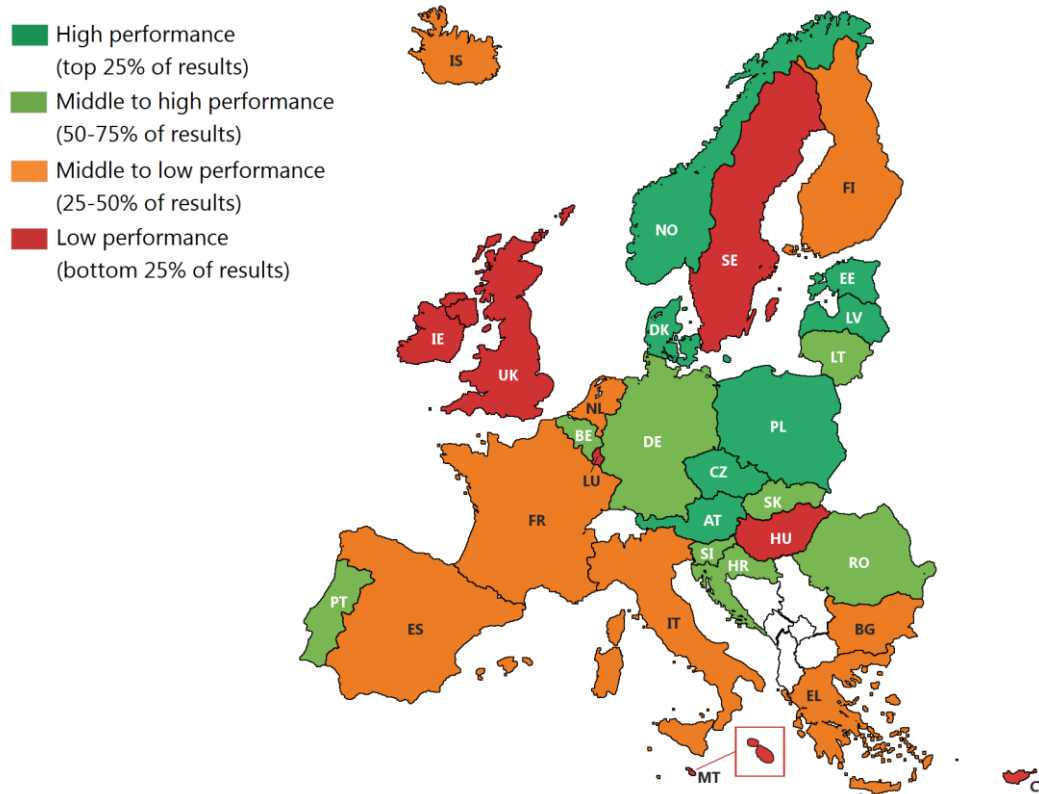
Q4b You have sold a good online, by mail or by phone. Legally, how many days can the consumer still change his/her mind and cancel the order?
(% - EU27_2019)



Base: All retailers in EU27_2019 who sell non-food products online, by mail or by telephone (N=2024)

Companies in the northern (44.5%) and eastern regions (50.9%) are more likely to give the correct answer ('14 days from the receipt of the good by the consumer') in this situation compared to retailers in EU27_2019 as a whole. There is no difference for companies in the southern and western regions, when compared to EU27_2019.

Q4b You have sold a good online, by mail or by phone. Legally, how many days can the consumer still change his/her mind and cancel the order?
 (% - 14 DAYS FROM THE RECEIPT OF THE GOOD BY THE CONSUMER)



Base: All retailers who sell non-food products online, by mail or by telephone (N=2302)

There are only seven countries where at least half of these retailers know **the consumer can cancel the order for 14 days from the receipt of the good**, with those in Estonia (69.7%), the Czech Republic (65.9%) and Poland (62.3%) the most likely to do so. Outside of EU27_2019 more than half in Norway are also aware of this (55.6%). At the other end of the scale, 20.8% of retailers in Malta, 25.2% in Luxembourg and 25.8% in Cyprus know the correct answer.

Compared to 2016, retailers in EU27_2019 are now more likely to know the consumer can cancel the order for 14 days from the receipt of the good (+6.8 pp). However, there has been an even larger increase in the proportion who think the customer has 14 days from the confirmation of the purchase (+8.6 pp). There has been a decrease in the proportion who think the customer has 7 days from receipt of the good (-3.5 pp).

In 11 countries, retailers are now more likely to know the consumer can cancel the order for 14 days from the receipt of the good, with the largest increase seen in Croatia (+21.7 pp). On the other hand, the largest decline in awareness is observed in the Ireland (-11.5 pp). The largest increase in the proportion who think the customer has 14 days from confirmation of the purchase is seen in Hungary (+21.3 pp). There are no decreases. The largest decrease in the proportion who think the customer has 7 days from receipt of the good is observed amongst retailers in Slovenia (-22.7 pp).

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Q4b You have sold a good online, by mail or by phone. Legally, how many days can the consumer still change his/her mind and cancel the order?
(%)

		7 days from the receipt of the good by the consumer	2018-2016	14 days from the confirmation of the purchase	2018-2016	14 days from the receipt of the good by the consumer (CORRECT ANSWER)	2018-2016	Don't know	2018-2016
EU27_2019		18.2	▼ 3.5	21.7	▲ 8.6	41.9	▲ 6.8	18.2	▼ 11.9
EU28		16.4	▼ 4.5	20.0	▲ 7.0	39.6	▲ 2.8	24.0	▼ 5.3
REGION NORTH		10.2	▼ 3.9	13.6	▲ 1.8	44.5	▲ 11.3	31.7	▼ 9.2
REGION EAST		14.7	▼ 5.9	14.7	▲ 7.7	50.9	▲ 12.3	19.7	▼ 14.1
REGION SOUTH		26.8	▼ 7.3	13.3	▲ 4.3	38.6	▲ 8.1	21.3	▼ 5.1
REGION WEST		17.6	=	25.9	▲ 8.7	41.0	▲ 4.8	15.5	▼ 13.5
BE		29.6	▲ 0.5	14.1	▼ 0.3	41.3	▲ 14.7	15.0	▼ 14.9
BG		19.5	▼ 13.8	14.3	▲ 7.7	34.6	▲ 10.0	31.6	▼ 3.9
CZ		9.7	▼ 0.6	14.7	▲ 6.1	65.9	▲ 18.2	9.7	▼ 23.7
DK		6.3	▲ 2.0	10.3	▼ 2.0	55.3	▲ 13.1	28.1	▼ 13.1
DE		11.4	▲ 3.7	31.9	▲ 14.8	44.0	▲ 3.9	12.7	▼ 22.4
EE		0.0	▼ 8.2	14.9	▲ 9.5	69.7	▲ 13.6	15.4	▼ 14.9
IE		18.8	▲ 3.0	13.7	▼ 0.2	28.8	▼ 11.5	38.7	▲ 8.7
EL		25.3	▼ 3.3	11.0	▲ 2.7	36.2	▲ 15.4	27.5	▼ 14.8
ES		28.2	▼ 2.1	12.3	▲ 2.6	41.1	▲ 7.1	18.4	▼ 7.6
FR		35.1	▼ 9.9	18.0	▼ 2.3	32.6	▲ 7.1	14.3	▲ 5.1
HR		26.4	▼ 6.0	3.7	▼ 5.3	46.9	▲ 21.7	23.0	▼ 10.4
IT		28.6	▼ 14.4	17.1	▲ 8.3	35.1	▲ 6.2	19.2	▼ 0.1
CY		49.6	▲ 11.6	0.0	▼ 9.9	25.8	▲ 2.9	24.6	▼ 4.6
LV		6.9	▼ 4.9	8.0	▲ 0.5	57.6	▲ 20.2	27.5	▼ 15.8
LT		17.0	▼ 8.5	13.5	▼ 1.0	50.0	▲ 12.3	19.5	▼ 2.8
LU		43.1	▲ 14.7	7.8	▼ 3.8	25.2	▲ 4.3	23.9	▼ 15.2
HU		12.7	▼ 4.1	27.6	▲ 21.3	29.0	▲ 3.5	30.7	▼ 20.7
MT		14.0	▼ 3.1	14.1	▲ 10.9	20.8	▼ 7.7	51.1	▼ 0.1
NL		13.3	▼ 5.2	19.5	▲ 3.8	40.2	▲ 5.3	27.0	▼ 3.9
AT		6.5	▼ 16.1	19.7	▲ 3.3	52.8	▲ 13.3	21.0	▼ 0.5
PL		11.8	▼ 3.1	14.5	▲ 7.3	62.3	▲ 7.9	11.4	▼ 12.1
PT		16.1	▼ 5.7	11.8	▲ 4.3	43.1	▲ 12.8	29.0	▼ 11.4
RO		17.2	▼ 7.6	15.2	▲ 9.8	45.3	▲ 12.1	22.3	▼ 14.3
SI		16.0	▼ 22.7	8.5	▲ 1.8	47.9	▲ 18.2	27.6	▲ 2.7
SK		13.4	▼ 12.4	13.2	▲ 6.1	42.0	▲ 17.2	31.4	▼ 10.9
FI		12.9	▼ 5.3	28.7	▲ 11.5	38.9	▼ 6.2	19.5	=
SE		11.5	▼ 2.4	7.8	▼ 3.1	31.1	▲ 14.4	49.6	▼ 8.9
IS		7.3	▼ 10.1	7.8	▼ 0.2	38.8	▲ 14.0	46.1	▼ 3.7
NO		7.4	▲ 1.7	15.1	▲ 6.5	55.6	▲ 13.9	21.9	▼ 22.1
UK		7.1	▼ 9.0	11.1	▼ 1.6	27.6	▼ 19.0	54.2	▲ 29.6

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers who sell non-food products online, by mail or by telephone (N=2302)

The analysis of company characteristics shows retailers that **know consumers have 14 days from receipt of the good to cancel their order** are more likely to belong to sector G - trade (49.0%) and be retailers where the respondent is a marketing manager (68.8%). They are less likely to belong to the services sector (27.2%) - particularly sector N (21.1%) - and they are less likely to be retailers selling food products (27.0%) or services (33.0%)

1.2. Trust of retailers

This section explores retailers' trust in the safety of non-food products, as well as their perceptions of environmental claims made about goods or services in their sector.

a) Trust in non-food product safety

Retailers that sell non-food products were asked to what extent they believe these products are safe or unsafe.

- Most retailers think non-food products are generally safe -

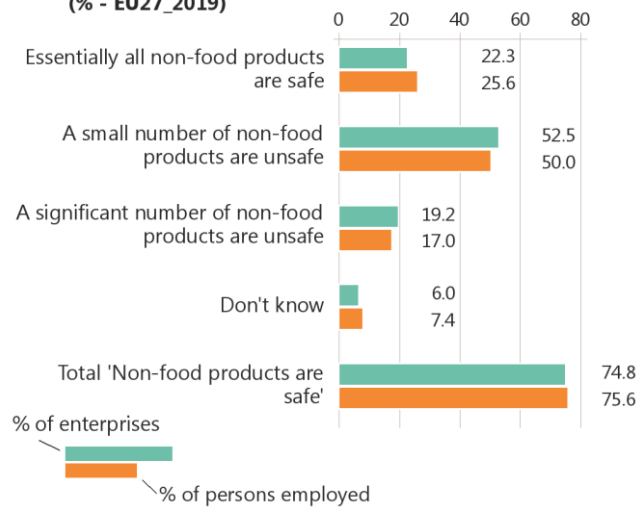
Overall almost three quarters (74.8%) of retailers in EU27_2019 think non-food products are usually safe¹⁰. More than one in five think **essentially all non-food products are safe** (22.3%), while just over half think **a small number of these products are unsafe** (52.5%). Looking at the results based on the proportion of persons employed shows 25.6% think essentially all non-food products are safe, and 50.0% think a small number of non-food products are safe.

Almost one in five retailers (19.2%) think **a significant number of non-food products are unsafe** (17.0% of persons employed), while more than one in twenty (6.0%) say they do not know (7.4% of persons employed).

¹⁰ This is the sum of the answers "Essentially all non-food products are safe" and "A small number of non-food products are safe".

Q4a "Product safety" relates to consumer products only and does not include industrial products. Unsafe products are those which fail to comply with safety standards. Here we are not talking for example about rifles or knives. Thinking about all non-food products currently available in your market in (OUR COUNTRY), do you think that ...?

(% - EU27_2019)

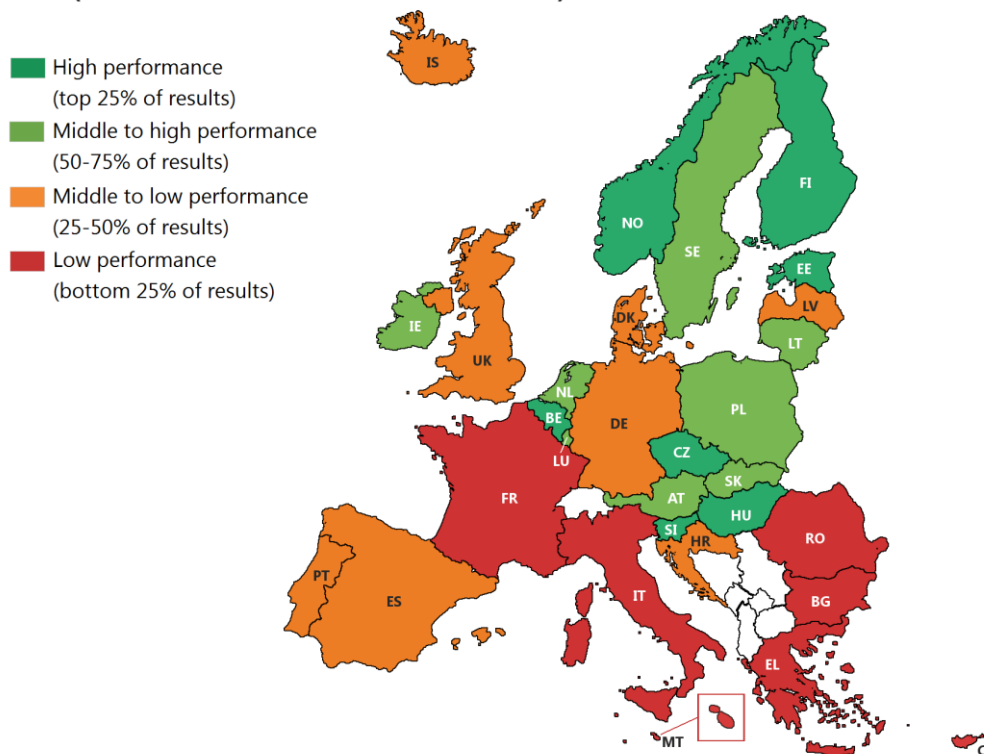


Base: Retailers in EU27_2019 selling non-food products (N=4222)

Retailers in the northern region (80.3%) are more likely to think **non-food products are safe**, while those in the south (69.8%) are less likely to do so, compared to EU27_2019. Companies in the western and eastern regions are not different from EU27_2019 as a whole.

Q4a "Product safety" relates to consumer products only and does not include industrial products. Unsafe products are those which fail to comply with safety standards. Here we are not talking for example about rifles or knives. Thinking about all non-food products currently available in your market in (OUR COUNTRY), do you think that ...?

(% - TOTAL 'NON-FOOD PRODUCTS ARE SAFE')



Base: Retailers which sell non-food products (N=4542)

In all countries, the majority of retailers think **non-food products are generally safe**, with proportions ranging from 90.1% in Finland, 85.5% in Belgium and 84.8% in Hungary and Slovenia to 51.3% in Malta, 52.3% in Bulgaria and 58.2% in Romania. Outside of EU27_2019, more than nine in ten in Norway also think this way (93.6%).

Across EU27_2019, there has been no change in the proportion of companies that say that **generally non-food products are safe**.

At a country level, the largest increase since 2016 in the proportion of companies that think that **generally non-food products are safe** is observed in Slovenia (+10.9 pp). The largest decline is observed amongst those in Malta (-38.6 pp).

Q4a "Product safety" relates to consumer products only and does not include industrial products. Unsafe products are those which fail to comply with safety standards. Here we are not talking for example about rifles or knives. Thinking about all non-food products currently available in your market in (OUR COUNTRY), do you think that ...?

(% - TOTAL 'NON-FOOD PRODUCTS ARE SAFE')

		2018	2018-2016	2016-2014	2014-2012
EU27_2019		74.8	▼ 0.4	▲ 2.2	▼ 2.1
EU28		74.4	▼ 2.0	▲ 1.8	▼ 2.0
REGION NORTH		80.3	▼ 3.0	▲ 4.4	▼ 5.4
REGION SOUTH		69.8	▼ 0.2	▲ 2.9	▼ 3.5
REGION EAST		72.6	▲ 1.9	▲ 2.8	▼ 4.2
REGION WEST		76.0	▼ 1.2	▲ 0.5	▼ 0.1
BE		85.5	▲ 9.4	▼ 2.7	▲ 4.9
BG		52.3	▼ 5.9	▼ 5.2	▲ 0.6
CZ		84.6	▼ 2.3	▲ 9.6	▼ 9.9
DK		71.3	▼ 2.1	▼ 0.1	▼ 10.3
DE		75.9	▼ 0.8	▲ 0.1	▼ 2.2
EE		84.3	▲ 4.2	▲ 0.4	▼ 8.7
IE		80.2	▼ 2.1	▼ 1.4	▼ 2.6
EL		60.8	▼ 5.0	▲ 5.0	▼ 1.4
ES		71.3	▲ 0.9	▲ 0.9	▼ 1.3
FR		70.5	▼ 3.1	▲ 2.4	▲ 4.3
HR		76.3	▲ 3.8	▲ 5.6	▼ 1.9
IT		69.8	▼ 1.4	▲ 6.3	▼ 8.5
CY		70.8	▲ 11.3	▼ 12.4	▲ 27.5
LV		73.8	▼ 1.9	▲ 0.7	▲ 9.6
LT		78.7	▼ 4.9	▲ 8.5	▼ 2.9
LU		80.1	▲ 6.8	▼ 7.7	▼ 3.2
HU		84.8	▲ 1.7	▲ 3.1	▼ 7.2
MT		51.3	▼ 38.6	▲ 9.7	▼ 1.4
NL		83.0	▼ 2.0	▲ 1.7	▼ 6.3
AT		79.1	▲ 0.1	▼ 6.3	▲ 8.2
PL		79.2	▲ 4.1	▲ 5.3	▼ 0.5
PT		73.9	▲ 6.7	▼ 3.8	▲ 2.5
RO		58.2	▲ 6.5	▼ 0.5	▼ 6.4
SI		84.8	▲ 10.9	▼ 3.3	▼ 1.2
SK		78.5	▲ 0.4	▲ 7.0	▼ 2.2
FI		90.1	▼ 1.9	▼ 1.7	▼ 2.7
SE		83.3	▼ 4.6	▲ 5.8	▼ 5.5
IS		75.4	▲ 5.5	▼ 6.5	▼ 2.7
NO		93.6	▲ 9.6	▲ 3.9	▼ 5.9
UK		72.2	▼ 12.3	▲ 1.2	▼ 1.9

- Results statistically significantly higher than EU results (T-test at 95% level)
- Results statistically significantly lower than EU results (T-test at 95% level)
- Statistically significant increase from one year to the other (T-test at 95% level)
- Statistically significant decrease from one year to the other (T-test at 95% level)

Base: Retailers which sell non-food (N=4542)

The analysis of company characteristics shows retailers that think **non-food products are generally safe** are more likely to:

- o be in service sector N: 85.1%;
- o be medium sized companies: 81.1%;
- o sell food products: 78.1%.

b) Trust in environmental claims

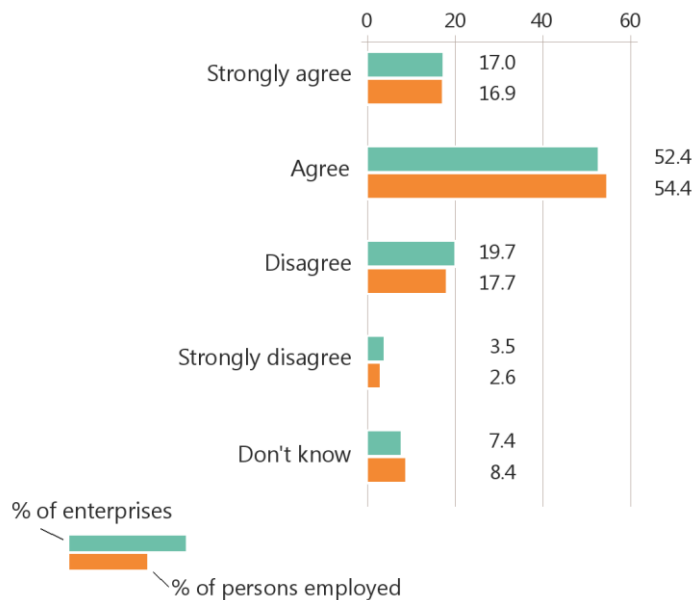
Retailers were asked their opinion about the reliability of environmental claims made about goods or services in their sector.

- More than two thirds of companies say the environmental claims made about goods or services in their sector are reliable -

Almost seven in ten retailers in EU27_2019 (69.4%) agree most of the environmental claims are reliable, with 17.0% strongly agreeing and 52.4% agreeing. Just over one in five retailers (23.2%) disagree: 19.7% disagree and less than one in twenty (3.5%) strongly disagree. Fewer than one in ten retailers (7.4%) say they do not know.

The results for the total persons employed follow the same pattern, with only minor differences in proportions.

Q12 Please tell me whether you strongly agree, agree, disagree, or strongly disagree with the following statement:
Most environmental claims about goods or services in your sector in (OUR COUNTRY) are reliable (% - EU27_2019)

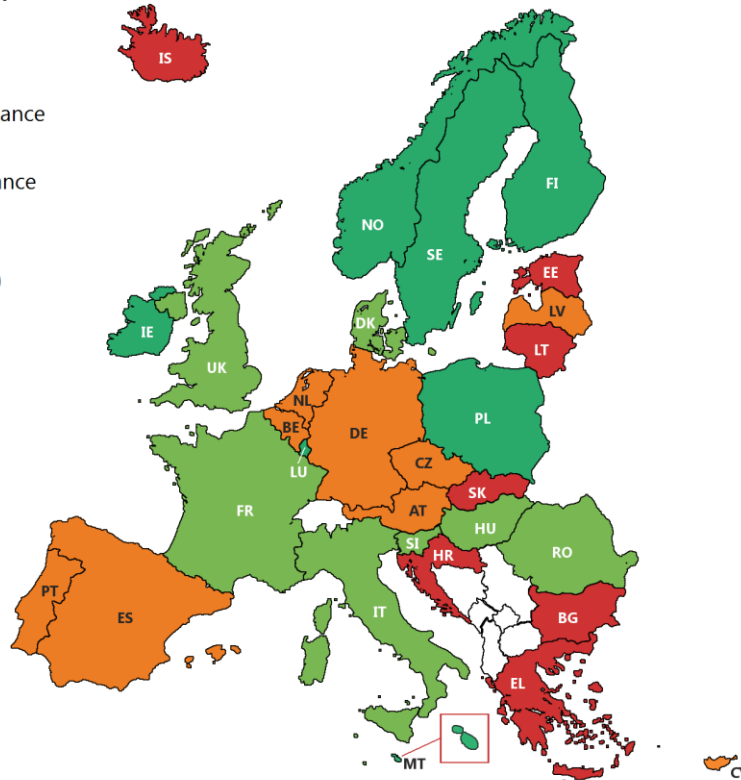


Base: All retailers in EU27_2019 (N=9796)

Retailers in the northern region are more likely to agree most environmental claims about goods or services in their sector are reliable (74.5%), while those in the western region are less likely to agree (67.4%) compared to EU27_2019. There are no differences between the eastern or southern regions and EU27_2019.

Q12 Please tell me whether you strongly agree, agree, disagree, or strongly disagree with the following statement:
Most environmental claims about goods or services in your sector in (OUR COUNTRY) are reliable
 (% - TOTAL 'AGREE')

- High performance (top 25% of results)
- Middle to high performance (50-75% of results)
- Middle to low performance (25-50% of results)
- Low performance (bottom 25% of results)



Base: All retailers (N=10747)

In all but one country, the majority of companies agree most environmental claims in their sector are reliable. Those in Finland (85.3%), Ireland (82.6%) and Luxembourg (81.8%) within EU27_2019, as well as those in Norway (85.1%), are the most likely to agree, while those in Estonia (49.5%), Bulgaria (52.8%) and Lithuania (55.3%) are the least likely to do so.

The EU27_2019 trend since 2016 shows a slight increase in the proportion of companies that agree with the idea that most environmental claims about goods or services in their sector are reliable in their country (+1.9 pp). This is a reversal of the trend seen in the previous wave.

Since the last survey, the largest increase in the proportion of companies that agree is observed in Malta (+12.6 pp), and a larger decrease is observed in Estonia for EU countries (-15.2 pp), and in Iceland if non-EU27_2019 countries are considered (-15.3 pp).

Q12 Please tell me whether you strongly agree, agree, disagree, or strongly disagree with the following statement:
Most environmental claims about goods or services in your sector in (OUR COUNTRY) are reliable
 (%)

		Total 'Agree'			Total 'Disagree'			Don't know		
		2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014
EU27_2019		69.4	▲ 1.9	▼ 1.6	23.2	▼ 2.0	▲ 1.7	7.4	▲ 0.1	▼ 0.1
EU28		70.8	▲ 1.9	▼ 1.6	21.8	▼ 1.6	▲ 1.6	7.4	▼ 0.3	=
REGION NORTH		74.5	▲ 1.0	▲ 0.6	14.7	▲ 0.2	▼ 2.0	10.8	▼ 1.2	▲ 1.4
REGION SOUTH		70.0	▲ 3.3	▼ 0.9	22.7	▼ 5.4	▲ 1.3	7.3	▲ 2.1	▼ 0.4
REGION EAST		72.2	▲ 3.2	▼ 2.6	18.2	▼ 3.2	▲ 1.4	9.6	=	▲ 1.2
REGION WEST		67.4	▲ 0.9	▼ 2.1	26.3	▼ 0.3	▲ 2.7	6.3	▼ 0.6	▼ 0.6
BE		70.8	▼ 5.7	▲ 0.5	16.9	▲ 2.3	▼ 1.1	12.3	▲ 3.4	▲ 0.6
BG		52.8	▼ 0.9	▼ 4.0	28.6	▼ 5.9	▲ 3.7	18.6	▲ 6.8	▲ 0.3
CZ		67.5	▲ 7.7	▼ 6.6	24.1	▼ 2.5	▲ 2.7	8.4	▼ 5.2	▲ 3.9
DK		79.4	▲ 11.2	▼ 6.7	11.2	▲ 0.8	▼ 2.8	9.4	▼ 12.0	▲ 9.5
DE		63.1	▼ 0.2	▼ 2.6	31.1	▲ 1.1	▲ 3.7	5.8	▼ 0.9	▼ 1.1
EE		49.5	▼ 15.2	▼ 3.2	7.0	▲ 2.3	▼ 0.5	43.5	▲ 12.9	▲ 3.7
IE		82.6	▲ 0.8	▼ 0.4	9.5	▼ 2.0	▼ 0.8	7.9	▲ 1.2	▲ 1.2
EL		60.7	▲ 1.9	▼ 2.2	33.1	▲ 0.1	▼ 3.9	6.2	▼ 2.0	▲ 6.1
ES		69.8	▼ 1.4	▼ 0.3	25.8	▲ 0.1	▲ 3.2	4.4	▲ 1.3	▼ 2.9
FR		79.1	▲ 5.9	▲ 2.8	18.9	▼ 5.8	=	2.0	▼ 0.1	▼ 2.8
HR		61.6	▼ 6.4	▲ 8.9	22.3	▲ 0.3	▼ 8.5	16.1	▲ 6.1	▼ 0.4
IT		73.7	▲ 10.3	▼ 1.0	16.5	▼ 14.4	▲ 1.4	9.8	▲ 4.1	▼ 0.4
CY		71.4	▲ 6.4	▲ 6.7	18.4	▼ 1.2	▲ 4.3	10.2	▼ 5.2	▼ 11.0
LV		67.8	▼ 10.3	▲ 2.8	21.3	▲ 5.2	▼ 3.3	10.9	▲ 5.1	▲ 0.5
LT		55.3	▲ 0.8	▲ 0.8	22.2	▼ 2.0	▼ 1.6	22.5	▲ 1.2	▲ 0.8
LU		81.8	▲ 8.1	▼ 2.8	9.3	▼ 6.5	▼ 5.2	8.9	▼ 1.6	▲ 8.0
HU		76.3	▲ 0.6	▼ 8.5	12.4	▲ 4.9	▼ 1.2	11.3	▼ 5.5	▲ 9.7
MT		80.2	▲ 12.6	▲ 3.3	8.0	▼ 10.7	▲ 0.3	11.8	▼ 1.9	▼ 3.6
NL		64.4	▲ 4.5	▼ 6.1	20.6	▼ 3.9	▲ 5.1	15.0	▼ 0.6	▲ 1.0
AT		70.1	▼ 0.8	▲ 1.7	21.3	▼ 1.6	▲ 0.3	8.6	▲ 2.4	▼ 2.0
PL		81.3	▲ 6.6	▲ 2.0	13.5	▼ 4.6	▼ 0.2	5.2	▼ 2.0	▼ 1.8
PT		63.1	▼ 2.5	▲ 0.4	30.1	▲ 4.5	▼ 5.2	6.8	▼ 2.0	▲ 4.8
RO		78.5	▲ 1.8	▼ 6.3	14.4	▼ 4.8	▲ 5.2	7.1	▲ 3.0	▲ 1.1
SI		78.8	▲ 6.8	▲ 7.6	14.3	▼ 7.5	▼ 1.7	6.9	▲ 0.7	▼ 5.9
SK		57.8	▼ 3.9	▲ 2.2	28.6	▼ 0.7	▲ 1.3	13.6	▲ 4.6	▼ 3.5
FI		85.3	▼ 0.8	▲ 3.8	10.0	▼ 1.1	▼ 3.6	4.7	▲ 1.9	▼ 0.2
SE		80.0	▲ 0.3	▲ 2.7	15.7	▲ 1.2	▼ 1.4	4.3	▼ 1.5	▼ 1.3
IS		60.0	▼ 15.3	▲ 13.4	26.0	▲ 13.8	▼ 12.9	14.0	▲ 1.5	▼ 0.5
NO		85.1	▲ 3.9	▲ 2.4	11.6	▼ 0.5	▼ 3.9	3.3	▼ 3.4	▲ 1.5
UK		79.8	▲ 3.2	▼ 2.2	12.8	▼ 0.9	▲ 2.0	7.4	▼ 2.3	▲ 0.2

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

The analysis of company characteristics illustrates retailers that agree **most environmental claims in their sector are reliable** are more likely to be those in the trade sector (71.5%) or service sectors N (78.8%) or L (79.3%), medium sized companies (75.3%) or those selling non-food products (71.6%).

2. Compliance and Enforcement

This chapter considers a range of issues to do with consumer legislation. Firstly, retailers' experience of unfair commercial practices will be reviewed. Next, their views on compliance with consumer legislation will be discussed, including the cost of compliance and perceptions of compliance by competitors. Retailers' perceptions about the enforcement of consumer legislation by a range of authorities and bodies will be considered, followed by a discussion of retailers' experience of warnings or recalls relating to non-food products.

2.1. Unfair commercial practices

Retailers were asked whether they had experienced a range of **unfair commercial practices** - that fall within the scope of the Unfair Commercial Practices Directive - in the last 12 months. The results examine the experience of unfair practices from local as well as cross-border competitors.

A composite indicator has been built from retailers' response about whether they had come across unfair commercial practices (UCPs), in six categories, by competitors in their own country. As explained in more detail in section 6 of this report, each retailer is given a percent-based score depending on the number of categories they have come across with and an average is calculated at EU, regional and country level.

At EU27_2019 level, 29.6% of retailers have faced at least one UCP from domestic competitors – this is a slight decrease since 2016 (-1.8 pp).

Retailers in the eastern (40.7%) and southern regions (31.9%) are more likely to report the incidence of unfair commercial practices from competitors in their country, while those in the western (26.0%) and northern (24.7%) are less likely to do so, compared to EU27_2019 as a whole.

Cc1_r Prevalence of UCPs in the sector, domestically
(AVERAGE INCIDENCE OF 6 UCP)

		2018	2018-2016	2016-2014
EU27_2019		29.6	▼ 1.8	▼ 4.0
EU28		28.3	▼ 1.8	▼ 3.6
REGION NORTH		24.7	▼ 0.4	▼ 1.6
REGION SOUTH		31.9	▲ 0.8	▼ 6.1
REGION EAST		40.7	▼ 3.7	▼ 3.5
REGION WEST		26.0	▼ 2.0	▼ 3.7
BE		21.1	▼ 2.1	▼ 0.7
BG		46.9	▼ 1.5	▼ 2.6
CZ		38.9	▼ 0.8	▼ 6.2
DK		18.7	▲ 5.2	▼ 4.8
DE		26.9	▼ 1.3	▼ 5.2
EE		17.1	▼ 3.1	▼ 5.2
IE		22.1	▼ 5.1	▼ 0.9
EL		34.6	▼ 5.9	▼ 6.3
ES		42.2	▲ 9.8	▼ 7.8
FR		26.1	▼ 3.2	▼ 2.0
HR		27.6	▼ 3.5	▼ 11.7
IT		23.5	▼ 5.1	▼ 4.4
CY		29.4	▼ 7.4	▲ 4.5
LV		26.0	▲ 1.3	▼ 4.2
LT		29.2	▼ 2.5	▲ 1.3
LU		17.4	▼ 2.5	▼ 2.5
HU		29.3	▼ 4.7	▼ 13.3
MT		20.2	▼ 9.9	▼ 4.9
NL		21.8	▼ 5.5	▼ 4.5
AT		26.7	▼ 3.3	▲ 1.3
PL		52.8	▼ 4.3	▲ 0.1
PT		30.7	▲ 4.1	▼ 6.0
RO		36.5	▼ 1.1	▼ 3.7
SI		25.8	▼ 5.8	▲ 5.8
SK		38.3	▼ 9.1	▼ 1.9
FI		32.4	▲ 0.3	▲ 0.5
SE		23.5	▼ 2.7	▼ 3.0
IS		21.7	▼ 2.0	▼ 6.1
NO		21.6	▼ 2.8	▼ 5.3
UK		19.8	▼ 3.1	▲ 0.4

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

- Retailers are much more likely to have experienced unfair commercial practices from competitors in their own country than from those elsewhere in EU27_2019 -

More than four in ten retailers in EU27_2019 (42.5%) say in the past year their domestic competitors have been **pressuring consumers with persistent commercial calls or messages**. Less than one in ten retailers who sell cross-border to other EU countries has experienced this practice from competitors in other EU countries (6.8%).

More than one third of retailers in EU27_2019 (36.8%) say domestic competitors have been **writing fake reviews which are in fact hidden adverts or hidden attacks on competitors**. Far fewer - 9.9% - have experienced this from cross-border competitors.

More than one third of retailers in EU27_2019 (36.3%) say domestic competitors have been **advertising falsely that a product is available only for a limited period**, a much higher proportion than retailers who have experienced this practice from competitors in another EU country (6.9%).

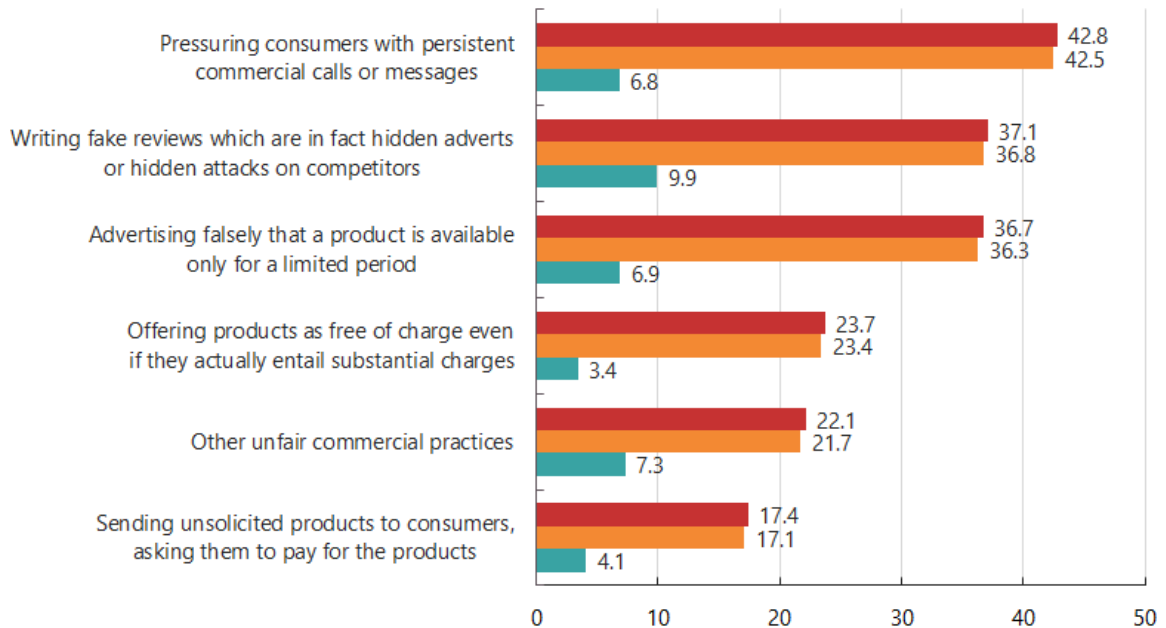
Almost one quarter of retailers in EU27_2019 (23.4%) say domestic competitors have been **offering products as free of charge even if they actually entail substantial charges**. Fewer than one in twenty companies (3.4%) has experienced this from competitors in another EU country.

More than one in five retailers in EU27_2019 (21.7%) have experienced **other unfair commercial practices** from domestic competitors, while 7.3% say this in relation to a competitor in another EU country.

Finally, more than one in ten retailers in EU27_2019 (17.1%) mentions that in the past year domestic competitors have been **sending unsolicited products to consumers, asking them to pay for the products**. It is much less common for retailers to have experienced this practice from competitors in another EU country (4.1%).

Q7abR Unfair commercial practices by competitors
(% - EU27_2019)

- Total (base: all retailers, N=9,796)
- In retailers' own country (base: all retailers, N=9,796)
- Yes, in another EU country (base: retailers selling in other EU countries, N=2,921)

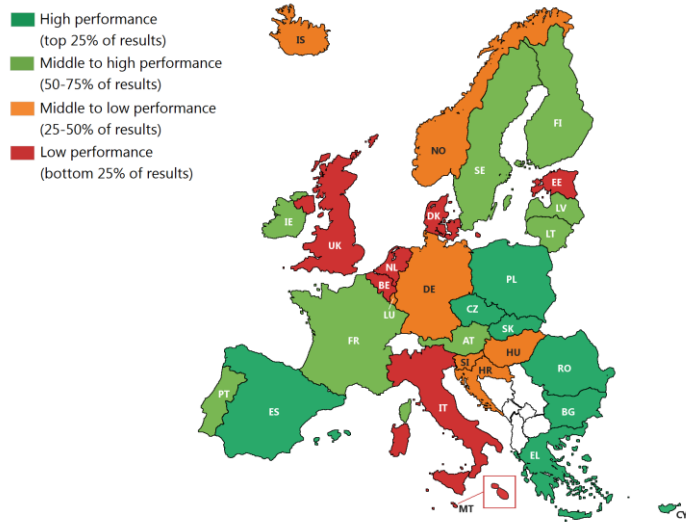


Retailers in the eastern region are more likely to have experienced each of these unfair commercial practices from domestic competitors in the last 12 months compared to EU27_2019 as a whole. Those in the southern region are also more likely to report domestic competitors **offering products as free of charge even if they actually entail substantial charges, pressuring consumers with persistent commercial calls or messages or advertising falsely that a product is available only for a limited period.** Retailers in the north are more likely to report domestic competitors engaging in **other unfair commercial practices.**

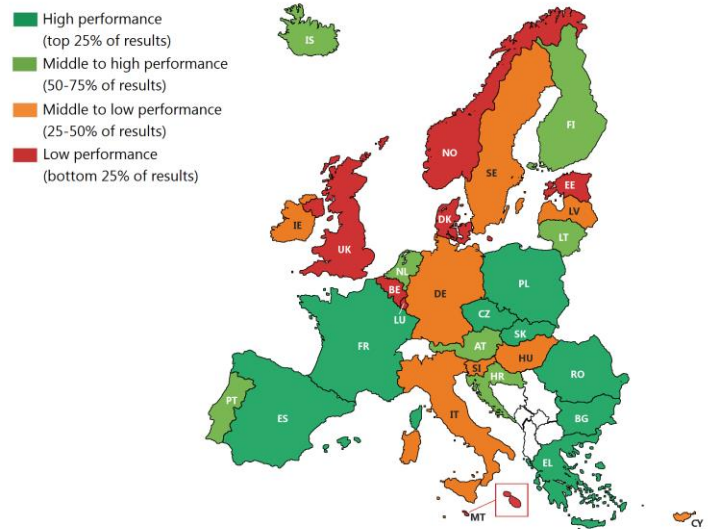
In the maps below, countries where the incidence of unfair commercial practices by domestic competitors is lower are presented in green, whereas the countries where it is higher are displayed in red.

EUROPEAN COMMISSION

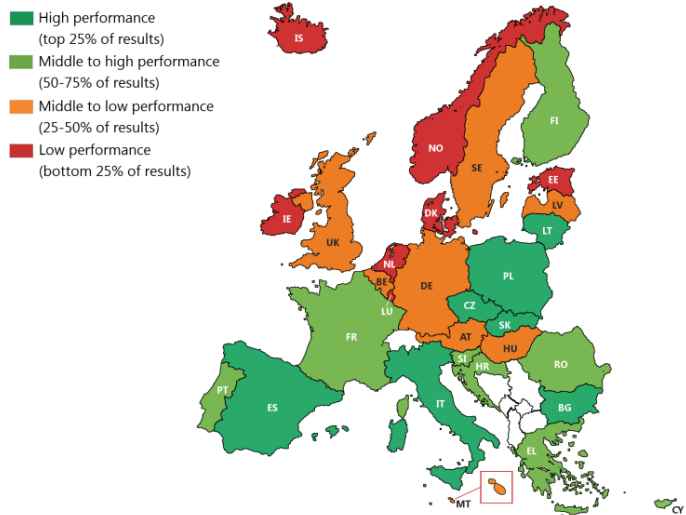
Q7abr.3 Unfair commercial practices by competitors
Advertising falsely that a product is available only for a limited period
 (% - IN RETAILERS' OWN COUNTRY)



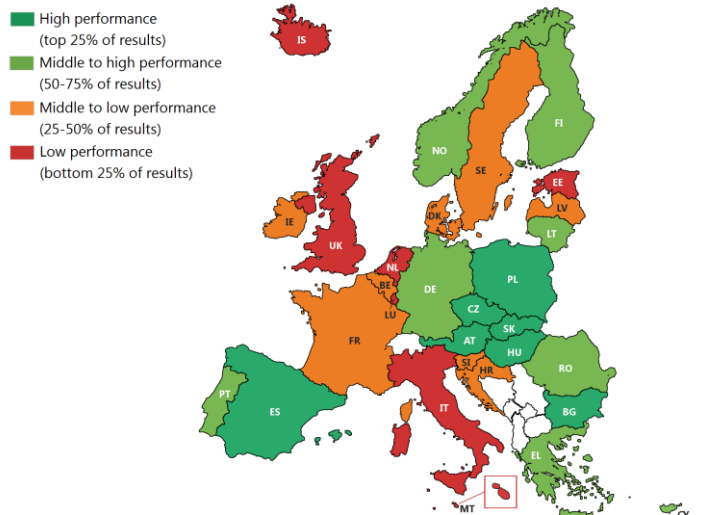
Q7abr.4 Unfair commercial practices by competitors
Writing fake reviews which are in fact hidden adverts or hidden attacks on competitors
 (% - IN RETAILERS' OWN COUNTRY)



Q7abr.2 Unfair commercial practices by competitors
Pressuring consumers with persistent commercial calls or messages
 (% - IN RETAILERS' OWN COUNTRY)



Q7abr.5 Unfair commercial practices by competitors
Sending unsolicited products to consumers, asking them to pay for the products
 (% - IN RETAILERS' OWN COUNTRY)



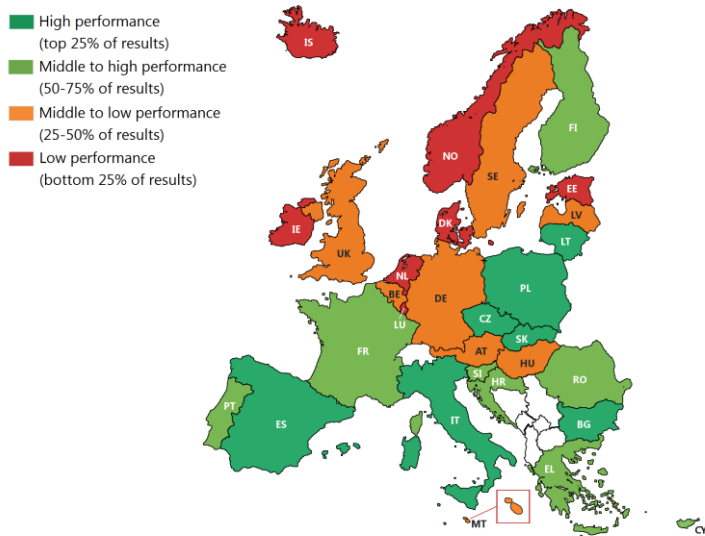
Base: All retailers (N=10747)

In the following pages, the country level results for each of these practices will be considered first for domestic competitors, and then for competitors in other EU countries (for retailers that sell cross-border in other EU countries).

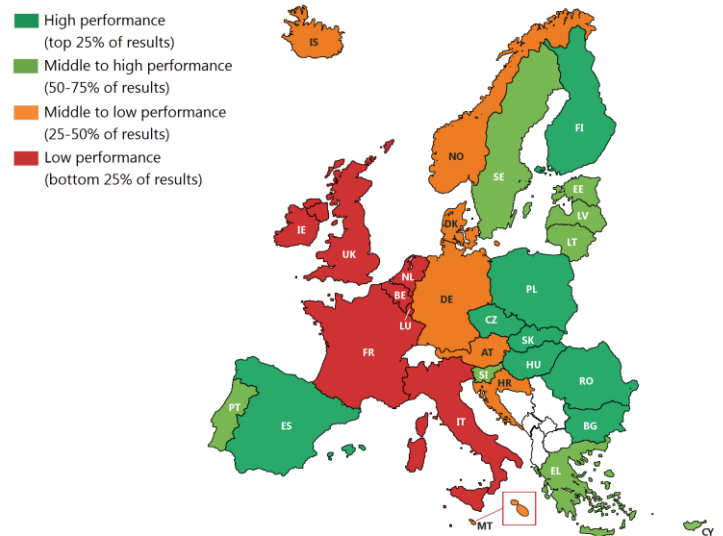
UCPs in retailers' own country

In five Member States at least half of all retailers say their domestic competitors have been **pressuring consumers with persistent commercial calls or messages**: Poland (68.3%), Spain (61.0%), Bulgaria (58.7%), the Czech Republic (53.7%) and Slovakia (50.7%). This compares to 21.0% of retailers in Luxembourg, 22.0% in Estonia and 22.9% in Denmark. At the EU27_2019 level there has been a small decrease in the proportion of retailers facing this UCP (-2.2 pp). At a country level, the largest decrease is seen in Malta (-17.7 pp), and the largest increase in Spain (+11.4 pp).

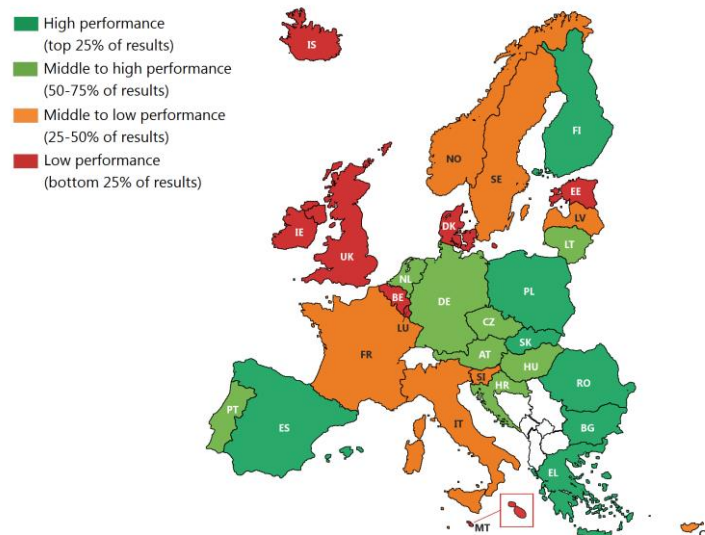
Q7abR.2 Unfair commercial practices by competitors
Pressuring consumers with persistent commercial calls or messages
(% - IN RETAILERS' OWN COUNTRY)



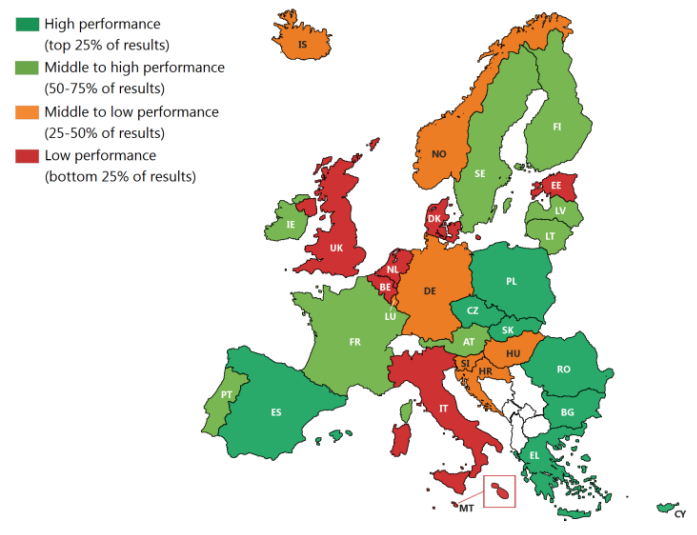
Q7abR.6 Unfair commercial practices by competitors
Other unfair commercial practices
(% - IN RETAILERS' OWN COUNTRY)



Q7abR.1 Unfair commercial practices by competitors
Offering products as free of charge even if they actually entail substantial charges
(% - IN RETAILERS' OWN COUNTRY)



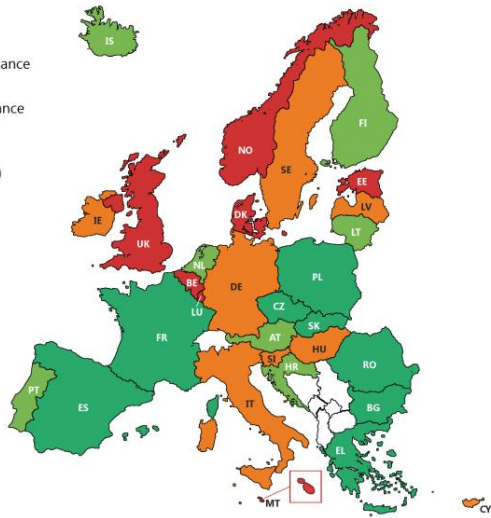
Q7abR.3 Unfair commercial practices by competitors
Advertising falsely that a product is available only for a limited period
(% - IN RETAILERS' OWN COUNTRY)



EUROPEAN COMMISSION

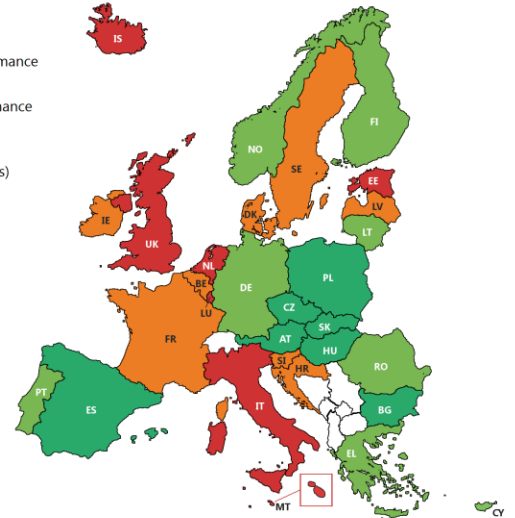
Q7abR.4 Unfair commercial practices by competitors
Writing fake reviews which are in fact hidden adverts or hidden attacks on competitors
 (% - IN RETAILERS' OWN COUNTRY)

- High performance (top 25% of results)
- Middle to high performance (50-75% of results)
- Middle to low performance (25-50% of results)
- Low performance (bottom 25% of results)



Q7abR.5 Unfair commercial practices by competitors
Sending unsolicited products to consumers, asking them to pay for the products
 (% - IN RETAILERS' OWN COUNTRY)

- High performance (top 25% of results)
- Middle to high performance (50-75% of results)
- Middle to low performance (25-50% of results)
- Low performance (bottom 25% of results)



Base: All retailers (N=10747)

Q7abR.2 Unfair commercial practices by competitors
Pressuring consumers with persistent commercial calls or messages
 (% - IN RETAILERS' OWN COUNTRY)

		2018	2018-2016	2016-2014
EU27_2019		42.5	▼ 2.2	▼ 6.6
EU28		40.9	▼ 2.4	▼ 6.1
REGION NORTH		33.8	▼ 2.3	▼ 2.7
REGION SOUTH		50.1	▲ 0.4	▼ 6.1
REGION EAST		52.9	▼ 5.6	▼ 2.5
REGION WEST		37.1	▼ 1.9	▼ 8.4
BE		33.9	▲ 1.2	▼ 4.0
BG		58.7	▼ 1.2	▲ 0.9
CZ		53.7	▲ 1.1	▼ 5.3
DK		22.9	▲ 6.3	▼ 9.0
DE		38.6	▲ 1.0	▼ 13.6
EE		22.0	▼ 14.6	▼ 2.8
IE		29.5	▼ 3.6	▼ 5.3
EL		43.3	▼ 8.1	▼ 10.1
ES		61.0	▲ 11.4	▼ 5.4
FR		39.7	▼ 7.6	▲ 0.7
HR		42.6	▲ 0.7	▼ 18.5
IT		45.3	▼ 6.1	▼ 6.3
CY		39.0	▼ 15.1	▲ 10.0
LV		36.8	▲ 2.1	▼ 5.6
LT		45.1	▼ 6.4	▲ 1.3
LU		21.0	▼ 3.5	▼ 11.0
HU		38.5	▼ 9.2	▼ 13.7
MT		30.5	▼ 17.7	▼ 4.4
NL		29.0	▼ 8.4	▼ 3.5
AT		30.7	▼ 10.9	▲ 1.9
PL		68.3	▼ 9.8	▲ 2.9
PT		41.7	▼ 0.4	▼ 6.5
RO		43.9	▼ 1.6	▼ 4.9
SI		41.1	▼ 6.9	▲ 10.0
SK		50.7	▼ 8.8	▼ 3.6
FI		43.4	▲ 2.6	▲ 2.1
SE		32.0	▼ 5.6	▼ 5.4
IS		26.2	▼ 3.4	▼ 6.4
NO		29.0	▼ 3.1	▼ 9.6
UK		31.2	▼ 4.5	▼ 1.3

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

There are three countries where the majority of retailers say their domestic competitors have been **writing fake reviews which are in fact hidden adverts or hidden attacks**: Poland (66.6%), Bulgaria (62.7%) and the Czech Republic (52.9%). Companies in Luxembourg (20.8%), Malta (21.6%), Estonia and Denmark (both 23.3%) are the least likely to have experienced this practice from a domestic competitor.

At EU27_2019 level there has been an increase in the proportion reporting this practice, compared to 2016 (+2.2 pp). At country level, the largest increase in the proportion of companies that say domestic competitors have done this is seen amongst retailers in Spain (+16.3 pp), while the largest decrease is recorded in Malta (-22.4 pp).

Q7abR.4 Unfair commercial practices by competitors
Writing fake reviews which are in fact hidden adverts or hidden attacks on competitors
 (% - IN RETAILERS' OWN COUNTRY)

		2018	2018-2016	2016-2014
EU27_2019		36.8	▲ 2.2	▼ 2.3
EU28		35.4	▲ 0.9	▼ 0.9
REGION NORTH		30.2	▲ 4.9	▼ 0.1
REGION SOUTH		37.2	▲ 4.3	▼ 3.6
REGION EAST		51.1	▲ 2.9	▼ 2.8
REGION WEST		33.3	▲ 1.1	▼ 2.3
BE		26.6	▲ 3.2	▼ 2.3
BG		62.7	▲ 6.6	▼ 5.3
CZ		52.9	▲ 4.8	▼ 8.2
DK		23.3	▲ 9.3	▼ 2.9
DE		31.6	▲ 1.1	▲ 0.3
EE		23.3	▼ 4.7	▲ 0.6
IE		29.9	▼ 2.6	▼ 4.6
EL		44.4	▲ 2.4	▼ 5.6
ES		46.7	▲ 16.3	▼ 7.0
FR		41.4	▲ 3.8	▼ 5.7
HR		35.2	▼ 1.4	▼ 7.2
IT		29.1	▼ 6.1	▼ 0.1
CY		29.1	▼ 14.6	▲ 7.2
LV		31.7	▲ 5.4	▼ 2.9
LT		38.2	▲ 4.1	▲ 1.3
LU		20.8	▼ 7.6	▲ 8.0
HU		30.7	▼ 2.0	▼ 11.0
MT		21.6	▼ 22.4	▲ 7.5
NL		34.5	▼ 0.6	▼ 4.2
AT		35.5	▲ 0.7	▲ 0.7
PL		66.6	▲ 8.6	▼ 1.2
PT		33.3	▲ 7.5	▼ 6.1
RO		45.6	▲ 1.8	▲ 1.6
SI		28.8	▼ 6.7	▲ 11.8
SK		44.0	=	▼ 4.4
FI		35.5	▲ 3.5	▲ 0.6
SE		29.1	▲ 5.6	▼ 0.1
IS		34.5	▲ 2.1	▼ 7.9
NO		18.5	▲ 1.5	▼ 0.1
UK		26.3	▼ 7.7	▲ 9.5

	Results statistically significantly higher than EU results (T-test at 95% level)
	Results statistically significantly lower than EU results (T-test at 95% level)
	Statistically significant increase from one year to the other (T-test at 95% level)
	Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

Retailers in Poland (62.6%), Bulgaria (54.9%) and Spain (53.2%) are the most likely to say their domestic competitors have been **advertising falsely that a product is available only for a limited period**. Those in Estonia (17.2%) and the Netherlands (22.7%) are least likely to mention this practice.

Compared to 2016, there has been no change at an EU27_2019 level. At a country level, the largest increase is observed amongst retailers in Spain (+14.9 pp), and the largest decrease is seen in Greece (-11.8 pp).

Q7abR.3 Unfair commercial practices by competitors
Advertising falsely that a product is available only for a limited period
 (% - IN RETAILERS' OWN COUNTRY)

		2018	2018-2016	2016-2014
EU27_2019		36.3	▲ 0.8	▼ 4.6
EU28		34.8	▲ 1.2	▼ 5.3
REGION NORTH		32.2	▲ 0.8	▼ 1.6
REGION SOUTH		38.8	▲ 4.1	▼ 7.4
REGION EAST		47.7	▼ 1.3	▼ 4.2
REGION WEST		32.4	▲ 0.5	▼ 4.1
BE		25.4	▼ 2.4	=
BG		54.9	▲ 4.2	▼ 4.7
CZ		41.8	▼ 1.5	▼ 10.6
DK		28.0	▲ 10.1	▼ 9.7
DE		33.1	▲ 0.9	▼ 5.5
EE		17.2	▼ 4.4	▼ 5.4
IE		34.3	▼ 4.2	▲ 1.1
EL		43.1	▼ 11.8	▼ 4.8
ES		53.2	▲ 14.9	▼ 7.8
FR		34.3	▲ 1.2	▼ 4.6
HR		33.1	▼ 2.1	▼ 8.9
IT		26.5	▼ 1.3	▼ 6.6
CY		46.6	▼ 0.4	▲ 8.0
LV		34.4	▲ 3.2	▼ 5.2
LT		36.0	▲ 2.1	▼ 0.5
LU		29.2	▲ 6.8	▼ 3.3
HU		31.7	▼ 2.1	▼ 18.5
MT		26.5	▼ 3.0	▼ 10.4
NL		22.7	▼ 3.0	▼ 0.7
AT		33.4	▼ 3.7	▲ 3.9
PL		62.6	▼ 1.2	▲ 2.4
PT		37.2	▲ 9.1	▼ 7.1
RO		44.9	▼ 0.2	▼ 3.4
SI		32.0	▼ 5.2	▲ 4.3
SK		46.6	▼ 3.1	▼ 0.9
FI		36.0	▲ 1.5	▲ 1.3
SE		33.4	▼ 4.1	▲ 1.2
IS		28.9	▲ 2.9	▼ 3.9
NO		30.8	▲ 3.0	▼ 11.0
UK		25.2	▲ 2.3	▼ 7.7

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

Less than half of the retailers in each country say that in the past year their domestic competitors have been **sending unsolicited products to consumers, asking them to pay for the products**, with those in Poland (42.9%), the Czech Republic (33.1%) and Slovakia (28.0%) the most likely to mention this. Retailers in Estonia (7.4%), the Netherlands (8.2%) and Luxembourg (8.9%) are the least likely to have experienced this.

Since the last survey in 2016, there has been a decrease in the proportion of EU27_2019 retailers reporting this practice (-2.2 pp). At a country level the largest increase in the proportion of retailers that mention this as a practice by domestic competitors is observed in Spain (+9.4 pp), while the largest decrease in EU27_2019 is observed in Slovakia (-8.3 pp).

Q7abR.5 Unfair commercial practices by competitors
Sending unsolicited products to consumers, asking them to pay for the products
 (% - IN RETAILERS' OWN COUNTRY)

		2018	2018-2016	2016-2014
EU27_2019		17.1	▼ 2.2	▼ 0.6
EU28		15.9	▼ 2.2	▼ 0.4
REGION NORTH		11.6	▲ 0.3	▼ 1.9
REGION SOUTH		17.2	▲ 1.9	▼ 4.7
REGION EAST		28.5	▼ 3.0	▼ 1.3
REGION WEST		14.4	▼ 3.8	▲ 1.4
BE		12.8	▼ 4.4	▼ 0.5
BG		26.9	▼ 2.6	▲ 1.9
CZ		33.1	▲ 4.2	▼ 1.8
DK		9.9	▲ 3.2	▼ 0.9
DE		16.0	▼ 4.1	▲ 1.7
EE		7.4	▼ 3.1	▼ 1.4
IE		10.1	▼ 1.8	▲ 1.2
EL		19.4	▲ 0.1	▼ 4.3
ES		26.0	▲ 9.4	▼ 6.8
FR		10.1	▼ 5.7	▲ 2.4
HR		11.0	▼ 6.7	▼ 6.1
IT		9.4	▼ 4.0	▼ 3.4
CY		17.2	▲ 2.3	▲ 7.7
LV		10.3	▲ 2.2	▼ 5.8
LT		13.1	▲ 0.5	▼ 0.6
LU		8.9	▼ 1.1	▼ 2.4
HU		23.9	▼ 3.4	▼ 15.0
MT		9.4	▼ 2.7	▼ 4.1
NL		8.2	▼ 7.1	▼ 3.3
AT		20.6	▲ 2.0	▼ 1.7
PL		42.9	▼ 4.4	▲ 4.4
PT		18.7	▲ 4.8	▼ 1.9
RO		18.5	=	▼ 5.4
SI		11.5	▼ 5.1	▲ 2.5
SK		28.0	▼ 8.3	▲ 0.9
FI		18.1	▼ 0.2	▼ 1.6
SE		9.9	▼ 1.8	▼ 4.4
IS		9.1	▼ 9.5	▲ 3.7
NO		13.9	▼ 1.6	▼ 4.8
UK		8.9	▼ 1.9	▲ 1.5

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

Retailers in Bulgaria (38.0%), Romania (37.8%) and Spain (36.9%) are the most likely to say their domestic competitors have been **offering products as free of charge even if they actually entail substantial charges**. At the opposite end of the scale, retailers in Luxembourg (8.8%), Denmark (10.1%) and Estonia (10.7%) are the least likely to say this.

At EU27_2019 level, the proportion of retailers saying domestic competitors offering products as free of charge even if they actually entail substantial charges has declined since 2016 (-5.1 pp). At a country level the biggest decrease is seen amongst retailers in Slovakia (-19.1 pp).

Q7abR.1 Unfair commercial practices by competitors
Offering products as free of charge even if they actually entail substantial charges
 (% - IN RETAILERS' OWN COUNTRY)

		2018	2018-2016	2016-2014
EU27_2019		23.4	▼ 5.1	▼ 4.0
EU28		22.2	▼ 5.0	▼ 3.3
REGION NORTH		17.3	▼ 3.8	▼ 0.8
REGION SOUTH		27.4	▼ 1.8	▼ 7.0
REGION EAST		31.5	▼ 9.0	▼ 3.3
REGION WEST		20.1	▼ 5.1	▼ 3.4
BE		12.2	▼ 6.6	▼ 0.6
BG		38.0	▼ 9.8	▼ 2.0
CZ		22.8	▼ 9.2	▼ 5.0
DK		10.1	▼ 1.2	▼ 2.0
DE		21.9	▼ 4.6	▼ 6.7
EE		10.7	▼ 1.6	▼ 6.8
IE		15.2	▼ 5.1	▼ 1.6
EL		31.6	▼ 8.2	▼ 8.1
ES		36.9	▲ 2.0	▼ 5.5
FR		15.8	▼ 7.8	▲ 1.2
HR		22.8	▼ 7.2	▼ 12.0
IT		19.5	▼ 3.1	▼ 6.2
CY		18.7	▼ 13.2	▲ 2.5
LV		16.2	▼ 0.1	▼ 6.5
LT		21.2	▼ 2.7	▲ 2.7
LU		8.8	▼ 4.2	▼ 4.2
HU		22.4	▼ 7.7	▼ 6.7
MT		15.1	▼ 6.8	▼ 9.4
NL		21.0	▼ 5.5	▼ 6.7
AT		22.2	▼ 3.0	▲ 3.5
PL		35.9	▼ 15.3	▲ 0.2
PT		25.9	▲ 4.8	▼ 12.0
RO		37.8	▲ 1.5	▼ 5.7
SI		18.3	▼ 5.7	▲ 2.4
SK		29.5	▼ 19.1	▼ 6.4
FI		28.8	▼ 1.3	▲ 1.9
SE		15.5	▼ 8.8	▼ 3.6
IS		11.8	▼ 8.7	▼ 9.5
NO		17.8	▼ 6.6	▼ 6.8
UK		14.3	▼ 5.2	▲ 2.4

	Results statistically significantly higher than EU results (T-test at 95% level)
	Results statistically significantly lower than EU results (T-test at 95% level)
	Statistically significant increase from one year to the other (T-test at 95% level)
	Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

Four in ten retailers in Poland (40.7%) and Bulgaria (40.2%) say their domestic competitors have exposed them to **other unfair commercial practices**. This compares to 11.0% in Italy and 13.8% in Ireland. At the EU27_2019 level, there has been a decline in the proportion of retailers that claim having faced this problem is recorded since 2016 (-4.0 pp). The largest decline is observed amongst retailers in Slovakia (-15.0 pp). The only increase is observed in Estonia (+9.5 pp).

Q7abR.6 Unfair commercial practices by competitors

Other unfair commercial practices
(% - IN RETAILERS' OWN COUNTRY)

		2018	2018-2016	2016-2014
EU27_2019		21.7	▼ 4.0	▼ 6.1
EU28		20.5	▼ 3.5	▼ 5.9
REGION NORTH		23.1	▼ 2.5	▼ 2.4
REGION SOUTH		20.7	▼ 4.0	▼ 7.9
REGION EAST		32.7	▼ 5.9	▼ 6.8
REGION WEST		18.7	▼ 3.0	▼ 5.8
BE		15.7	▼ 3.8	▲ 3.0
BG		40.2	▼ 6.3	▼ 6.3
CZ		28.9	▼ 4.3	▼ 6.2
DK		18.2	▲ 3.5	▼ 4.2
DE		20.5	▼ 1.7	▼ 7.8
EE		21.8	▲ 9.5	▼ 15.5
IE		13.8	▼ 12.9	▲ 3.9
EL		25.6	▼ 9.9	▼ 4.9
ES		29.3	▲ 4.5	▼ 14.3
FR		15.2	▼ 3.1	▼ 5.9
HR		20.6	▼ 4.3	▼ 17.3
IT		11.0	▼ 10.1	▼ 3.7
CY		25.9	▼ 3.4	▼ 8.6
LV		26.7	▼ 5.0	▲ 1.0
LT		21.7	▼ 12.4	▲ 3.2
LU		15.9	▼ 4.9	▼ 2.5
HU		28.7	▼ 3.7	▼ 14.8
MT		18.3	▼ 6.8	▼ 8.5
NL		15.6	▼ 8.0	▼ 8.7
AT		17.9	▼ 4.9	▼ 0.7
PL		40.7	▼ 3.6	▼ 8.1
PT		27.5	▼ 1.4	▼ 2.4
RO		28.1	▼ 8.0	▼ 4.6
SI		23.2	▼ 5.2	▲ 3.7
SK		31.1	▼ 15.0	▲ 2.9
FI		32.3	▼ 4.3	▼ 0.9
SE		21.0	▼ 1.7	▼ 5.6
IS		19.8	▲ 4.5	▼ 12.8
NO		19.8	▼ 9.7	▲ 0.6
UK		13.1	▼ 1.5	▼ 2.1

	Results statistically significantly higher than EU results (T-test at 95% level)
	Results statistically significantly lower than EU results (T-test at 95% level)
	Statistically significant increase from one year to the other (T-test at 95% level)
	Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

The **analysis of company characteristics** illustrates several consistent patterns. Medium sized companies are less likely to report each practice, with the exception of sending unsolicited products to consumers. Large companies are also less likely to report each practice, with the exception of advertising falsely that a product is available only for a limited period and sending unsolicited products to consumers.

In addition, the analysis highlights the following differences.

Companies that have experienced domestic competitors **pressuring consumers with persistent commercial calls or message** are most likely to be found in the following groups:

- o trade sector companies (46.1%). They are less likely to be service sector companies (40.4%), and in particular those in sectors H (37.8%), N (33.4%) or J (29.6%);
- o companies established between 1990 and 1999: 45.4%;
- o companies that sell non-food products: 45.3%.

Companies that have experienced domestic competitors **advertising falsely that a product is available only for a limited period** are most likely to be found in the following groups:

- o companies in the trade sector (42.8%). They are less likely to be in the service sector (32.5%), and particularly in sectors H (28.6%), J (28.6%) or S (21.4%);
- o companies engaged in online sales (39.1%) or distance sales generally (38.0%);
- o retailers selling non-food products (41.2%).

Retailers that have experienced domestic competitors **writing fake reviews which are in fact hidden adverts or hidden attacks on competitors** are most likely to be found in the following groups:

- o companies in service sector I: 44.8%. They are less likely to be in service sectors N (29.4%), H (28.8%), S (28.3%), K (26.5%) or L (25.8%);
- o companies established in 2000 or later: 40.6%;
- o companies that sell online: 41.2%;
- o companies selling food products: 41.6%.

Retailers that have experienced domestic competitors **sending unsolicited products to consumers, asking them to pay for the products** are most likely to be found in the following groups:

- o trade sector companies (19.7%). They are less likely to be service sector companies (15.6%), and particularly those in sectors J (10.5%), S (13.3%) and H (13.4%);
- o companies established between 1990 and 1999: 18.9%.

UCPs in another EU country

There are no differences between different regions.

Each UCP will be discussed separately in the following pages.

Companies in Luxembourg (24.8%), Belgium (13.2%) and Austria and Latvia (both 12.9%) are the most likely to mention competitors in another EU country **pressuring consumers with persistent commercial calls or messages**, while retailers in the Netherlands (2.9%), Slovakia (3.1%) and Estonia (3.4%) are the least likely to mention this¹¹.

Compared to 2016, there has been no change in the proportion that mention competitors in another EU country **pressuring consumers with persistent commercial calls or messages**. There are no differences at a country level.

¹¹ Results from Cyprus (n=16), Norway (n=43), Finland (n=46) and Malta (n=47) are not included in the discussion due to very low sample size. Results from the following countries should be interpreted with caution due to small sample size (50-99): Luxembourg (n=54), Poland (n=57), Iceland (n=58) the United Kingdom (n=85), Romania (n=77), Denmark (n=89), the Czech Republic (n=95), Estonia (n=99), the Netherlands (n=99). The same sample sizes also apply to Q7a.1, Q7a.3, Q7a.4, Q7a.5 and Q7a.6.

Q7a.2 Please tell me if you have come across any of the following unfair commercial practices by your competitors in the last 12 months (MAX. 2 ANSWERS):

Pressuring consumers with persistent commercial calls or messages

(% - YES, IN ANOTHER EU COUNTRY)

		2018	2018-2016	2016-2014
EU27_2019		6.8	▲ 0.5	▼ 1.6
EU28		6.4	▲ 0.3	▼ 2.0
REGION NORTH		7.4	▲ 0.1	▼ 0.1
REGION SOUTH		8.0	▲ 1.4	▼ 1.3
REGION EAST		7.0	▼ 0.3	▲ 1.4
REGION WEST		6.1	▲ 0.4	▼ 2.8
BE		13.2	▼ 4.5	▲ 8.3
BG		10.1	▲ 3.9	▲ 2.2
CZ		4.1	▼ 0.1	▼ 3.7
DK		4.1	▼ 0.4	▲ 1.5
DE		3.7	▲ 1.7	▼ 4.8
EE		3.4	▼ 3.2	▲ 1.7
IE		6.5	▼ 2.1	▼ 3.3
EL		4.6	▼ 4.2	▲ 1.4
ES		9.6	▲ 1.7	▼ 0.6
FR		7.3	▼ 3.6	▲ 2.6
HR		7.7	▲ 1.6	▲ 1.6
IT		7.5	▲ 2.4	▼ 0.2
CY		2.0	▼ 9.6	▲ 9.1
LV		12.9	▲ 7.5	▼ 3.7
LT		12.1	▼ 3.5	▲ 6.6
LU		24.8	▼ 2.3	▼ 1.5
HU		6.4	▼ 1.1	▲ 1.8
MT		2.6	▼ 4.3	▼ 8.5
NL		2.9	▲ 1.8	▼ 7.0
AT		12.9	▼ 7.0	▲ 2.4
PL		3.6	▼ 6.6	▲ 5.7
PT		11.0	▲ 6.8	▼ 10.5
RO		10.9	▲ 1.8	▲ 5.4
SI		11.7	▲ 0.9	▲ 3.0
SK		3.1	▼ 4.3	▼ 4.3
FI		8.3	▼ 5.2	▲ 5.2
SE		5.9	▲ 1.6	▼ 7.3
IS		6.6	▲ 0.7	▲ 0.5
NO		7.0	▼ 1.4	▼ 13.1
UK		3.3	▼ 0.5	▼ 5.6

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers selling in other EU countries (N=3107)

Just over one in five companies in Austria (21.3%), as well as 16.5% in Croatia and 15.7% in Greece have experienced competitors in another EU country **writing fake reviews which are in fact hidden adverts or hidden attacks**, compared to 2.5% of retailers in Hungary, 6.6% in Italy and 7.1% in the Czech Republic, Ireland and Luxembourg.

Since 2016 the proportion of companies experiencing this has increased at the EU27_2019 level (+3.1 pp). At country level, the largest increase is observed amongst retailers in Portugal (+10.2 pp), and the largest decrease amongst those in Luxembourg (-14.4 pp).

Q7a.4 Please tell me if you have come across any of the following unfair commercial practices by your competitors in the last 12 months
(MAX. 2 ANSWERS):

Writing fake reviews which are in fact hidden adverts or hidden attacks on competitors

(% - YES, IN ANOTHER EU COUNTRY)

		2018	2018-2016	2016-2014
EU27_2019		9.9	▲ 3.1	▼ 2.1
EU28		9.9	▲ 3.3	▼ 2.0
REGION NORTH		8.3	▲ 4.7	▼ 3.8
REGION SOUTH		11.4	▲ 2.5	▼ 2.5
REGION EAST		9.5	▲ 2.8	=
REGION WEST		9.6	▲ 3.4	▼ 2.0
BE		14.3	▼ 1.8	▲ 3.2
BG		13.0	▲ 1.7	▲ 4.7
CZ		7.1	▲ 2.9	▼ 1.4
DK		9.5	▲ 5.1	▼ 2.7
DE		7.3	▲ 4.2	▼ 3.1
EE		7.2	▲ 1.5	▲ 2.4
IE		7.1	▼ 0.8	▼ 4.0
EL		15.7	▼ 3.4	▼ 0.1
ES		13.5	▲ 7.9	▼ 4.9
FR		10.4	▲ 0.5	▲ 0.6
HR		16.5	▲ 6.2	▲ 1.2
IT		6.6	▼ 3.3	▼ 1.5
CY		26.0	▲ 13.5	▲ 6.6
LV		14.3	▲ 8.9	▼ 1.3
LT		8.9	▲ 5.7	▼ 2.6
LU		7.1	▼ 14.4	▲ 4.8
HU		2.5	▼ 2.0	▲ 1.2
MT		12.4	▲ 0.2	▼ 5.3
NL		8.3	▲ 5.5	▼ 4.0
AT		21.3	▲ 1.1	▲ 4.1
PL		8.2	▲ 1.5	▲ 2.4
PT		15.2	▲ 10.2	▼ 5.1
RO		12.5	▲ 8.3	▼ 3.6
SI		10.8	▲ 1.6	▲ 3.8
SK		11.1	▲ 2.5	▼ 6.8
FI		1.4	▼ 3.2	▼ 4.1
SE		7.8	▲ 7.0	▼ 8.9
IS		11.0	▼ 1.7	▲ 3.1
NO		9.6	▲ 8.0	▼ 10.4
UK		9.8	▲ 5.2	▼ 0.6

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers selling in other EU countries (N=3107)

Retailers in Luxembourg (16.9%), Spain (15.1%) and Austria (13.7%) are the most likely to have experienced competitors in other EU countries **advertising falsely that a product is available only for a limited period**. At the opposite end of the scale, companies in Hungary (2.4%), Denmark (2.8%) and Estonia (3.0%) are the least likely to have experienced this.

Compared to 2016, there has been no change in the proportion experiencing this. At country level, retailers' likelihood of experiencing competitors in other EU countries **advertising falsely that a product is available only for a limited period** has increased in Spain (+9.1 pp) and the Netherlands (+7.6 pp) and decreased in Greece (-10.5 pp) and Slovakia (-6.2 pp).

Q7a.3 Please tell me if you have come across any of the following unfair commercial practices by your competitors in the last 12 months
(MAX. 2 ANSWERS):

Advertising falsely that a product is available only for a limited period

(% - YES, IN ANOTHER EU COUNTRY)

		2018	2018-2016	2016-2014
EU27_2019		6.9	▲ 0.2	▲ 0.4
EU28		7.0	▲ 0.3	▲ 0.4
REGION NORTH		5.0	▲ 0.6	▼ 2.0
REGION SOUTH		8.8	▲ 0.9	▲ 1.3
REGION EAST		5.9	▼ 0.3	▲ 0.8
REGION WEST		6.5	▼ 0.1	▲ 0.1
BE		11.1	▼ 2.0	▲ 3.8
BG		6.1	▲ 0.8	▲ 0.1
CZ		3.1	▼ 3.5	▲ 2.2
DK		2.8	▲ 0.5	▼ 1.5
DE		3.1	▼ 3.3	▲ 0.4
EE		3.0	▲ 3.0	▼ 1.7
IE		8.5	▲ 0.7	▼ 0.7
EL		6.1	▼ 10.5	▲ 2.0
ES		15.5	▲ 9.1	▼ 1.6
FR		9.1	▲ 5.4	▼ 0.7
HR		9.1	▲ 2.4	▲ 1.8
IT		4.1	▼ 3.7	▲ 5.3
CY		20.1	▲ 3.6	▲ 11.0
LV		9.2	▲ 4.0	▼ 5.8
LT		5.8	▲ 3.1	▼ 0.9
LU		16.9	▼ 4.5	▲ 3.6
HU		2.4	▼ 1.1	▼ 1.5
MT		3.5	▼ 1.3	▼ 5.4
NL		8.2	▲ 7.6	▼ 4.5
AT		13.7	▼ 2.4	▲ 4.2
PL		5.0	▲ 2.1	▼ 1.8
PT		9.1	▲ 5.3	▼ 6.0
RO		12.6	▼ 0.7	▲ 7.6
SI		7.5	▲ 2.5	▼ 1.7
SK		3.1	▼ 6.2	▼ 2.7
FI		1.4	▼ 6.2	▲ 0.4
SE		5.6	▼ 2.7	▼ 3.2
IS		3.4	▲ 0.8	▼ 1.2
NO		4.4	▼ 0.4	▼ 10.3
UK		7.6	▲ 1.4	▲ 0.3

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers selling in other EU countries (N=3107)

Austria is the only country where at least on in ten of this group of retailers say competitors in other EU countries have been **offering products as free of charge even if they actually entail substantial charges** (12.3%), followed by 9.8% of retailers in Romania and 8.5% in Luxembourg. In contrast, just 1.0% of companies in Germany, 1.1% in Lithuania and 1.4% in Poland also say they have experienced this.

Since 2016, there has been a decrease at the EU27_2019 level in the proportion of retailers that mention having come across this practice in another EU country (-1.7 pp). At country level, there has been a decrease in the proportion of retailers in Belgium (-9.9 pp) and Greece (-7.8 pp) that have experienced this.

Q7a.1 Please tell me if you have come across any of the following unfair commercial practices by your competitors in the last 12 months (MAX. 2 ANSWERS):

Offering products as free of charge even if they actually entail substantial charges

(% - YES, IN ANOTHER EU COUNTRY)

		2018	2018-2016	2016-2014
EU27_2019		3.4	▼ 1.7	▼ 1.6
EU28		3.5	▼ 1.5	▼ 1.9
REGION NORTH		3.9	▼ 0.2	▼ 0.1
REGION SOUTH		3.6	▼ 1.4	▼ 3.6
REGION EAST		4.7	▲ 0.2	▼ 0.5
REGION WEST		3.0	▼ 2.5	▼ 1.2
BE		5.8	▼ 9.9	▲ 11.1
BG		7.0	▲ 3.2	▼ 2.5
CZ		2.0	▼ 3.2	▲ 0.6
DK		2.9	▲ 0.6	▼ 0.3
DE		1.0	▼ 2.5	▼ 3.4
EE		2.2	▼ 1.1	▲ 1.3
IE		6.6	▼ 1.6	▲ 4.9
EL		3.0	▼ 7.8	▼ 2.7
ES		4.3	▼ 2.6	▼ 3.8
FR		3.2	▼ 5.0	▲ 1.3
HR		6.6	▲ 0.5	▲ 5.3
IT		2.8	▲ 0.6	▼ 1.9
CY		0.0	▼ 4.8	▲ 2.4
LV		5.8	▼ 0.6	▼ 0.1
LT		1.1	▼ 1.2	▼ 1.1
LU		8.5	▼ 5.4	▼ 6.4
HU		2.4	▼ 0.3	▲ 0.6
MT		6.1	▼ 1.3	▼ 7.0
NL		1.8	▼ 0.4	▼ 1.8
AT		12.3	▲ 0.7	▲ 2.5
PL		1.4	▼ 2.5	▲ 0.8
PT		5.1	▲ 3.2	▼ 7.5
RO		9.8	▲ 5.3	▼ 5.3
SI		5.4	▲ 0.7	▼ 1.5
SK		5.0	▼ 2.8	▼ 0.4
FI		5.8	▲ 2.8	▲ 1.0
SE		4.7	▼ 2.1	▼ 0.7
IS		4.4	▲ 4.4	▼ 4.9
NO		9.6	▲ 6.5	▼ 11.8
UK		4.4	▲ 1.1	▼ 5.2

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers selling in other EU countries (N=3107)

Companies in Luxembourg (20.1%), Latvia (16.9%) and Austria (13.6%) are the most likely to say competitors in other EU countries have exposed them to **other unfair commercial practices**, while those in Italy, Denmark (both 2.9%) and Hungary (3.2%) are the least likely to say this.

There has been no change in the proportion of retailers experiencing this compared to 2016. At country level, the largest increase in the proportion of retailers that mention having come across this practice in another EU country is observed in Luxembourg (+13.6 pp), while the largest decrease is seen amongst retailers in Belgium (-9.1 pp).

Q7a.6 Please tell me if you have come across any of the following unfair commercial practices by your competitors in the last 12 months (MAX. 2 ANSWERS):

Other unfair commercial practices
(% - YES, IN ANOTHER EU COUNTRY)

		2018	2018-2016	2016-2014
EU27_2019		7.3	▲ 1.2	▼ 1.0
EU28		6.9	▲ 1.0	▼ 1.0
REGION NORTH		7.4	▼ 0.5	▼ 0.1
REGION SOUTH		5.4	▼ 0.4	▼ 2.8
REGION EAST		6.8	▲ 0.2	▲ 0.1
REGION WEST		8.1	▲ 2.2	▼ 0.4
BE		11.2	▼ 9.1	▲ 16.1
BG		8.4	=	▲ 4.2
CZ		6.2	▲ 2.0	▼ 3.3
DK		2.9	▼ 0.5	▼ 2.1
DE		7.4	▲ 2.4	▼ 1.5
EE		8.6	▲ 3.1	▼ 2.1
IE		3.6	▼ 6.2	▲ 3.3
EL		4.1	▼ 2.9	▼ 5.9
ES		7.8	▼ 1.1	▼ 2.4
FR		8.4	▲ 2.8	▲ 1.0
HR		13.2	▲ 9.1	▼ 0.7
IT		2.9	▲ 0.9	▼ 0.5
CY		13.0	▲ 1.4	▲ 5.7
LV		16.9	▲ 2.0	▼ 3.0
LT		9.1	▼ 2.5	▲ 2.0
LU		20.1	▲ 13.6	▼ 12.0
HU		3.2	▼ 4.0	▲ 3.8
MT		7.5	▲ 3.3	▼ 9.3
NL		4.0	▲ 1.9	▼ 4.2
AT		13.6	▲ 6.4	▼ 1.5
PL		7.5	▲ 3.6	▼ 3.9
PT		9.4	▲ 2.5	▼ 3.9
RO		7.5	▼ 5.0	▲ 4.0
SI		5.6	▼ 6.6	▲ 9.0
SK		4.6	▼ 0.8	▼ 6.3
FI		5.5	▲ 2.5	▼ 4.8
SE		6.4	▼ 1.2	▲ 3.2
IS		7.6	▲ 7.6	▼ 7.5
NO		2.6	▼ 8.5	▲ 0.2
UK		3.8	▲ 0.3	▼ 1.2

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers selling in other EU countries (N=3107)

Companies in Luxembourg (13.5%), Austria (10.4%) and Romania (10.1%) are the most likely to have experienced competitors in other EU countries **sending unsolicited products to consumers and asking them to pay**, while no companies in Finland in EU27_2019, nor in Iceland outside EU27_2019 report this.

Compared to 2016, there has been an increase in the proportion of companies in EU27_2019 experiencing this (+1.0 pp). The only change at country level is an increase in retailers in Croatia reporting this practice (+5.4 pp).

Q7a.5 Please tell me if you have come across any of the following unfair commercial practices by your competitors in the last 12 months
(MAX. 2 ANSWERS):

Sending unsolicited products to consumers, asking them to pay for the products

(% - YES, IN ANOTHER EU COUNTRY)

		2018	2018-2016	2016-2014
EU27_2019		4.1	▲ 1.0	▼ 0.4
EU28		3.7	▲ 0.9	▼ 1.0
REGION NORTH		3.1	▲ 1.3	▼ 0.2
REGION SOUTH		2.3	▼ 0.6	▼ 1.0
REGION EAST		4.4	▲ 1.2	▲ 0.5
REGION WEST		4.8	▲ 1.5	▼ 0.5
BE		5.4	▼ 2.2	▲ 2.1
BG		3.5	▲ 2.5	▼ 2.3
CZ		4.3	▲ 1.6	▲ 0.7
DK		3.2	▲ 0.5	▲ 2.0
DE		4.3	▲ 1.7	▼ 2.2
EE		1.0	▲ 1.0	▼ 1.9
IE		5.3	▲ 2.6	▲ 0.1
EL		3.3	▼ 0.9	▼ 2.2
ES		3.8	▼ 0.5	▼ 0.5
FR		4.0	▼ 0.7	▲ 4.4
HR		6.6	▲ 5.4	▲ 0.3
IT		0.3	▼ 0.8	▼ 0.1
CY		0.0	▼ 3.9	▲ 1.5
LV		5.3	▲ 2.6	▼ 6.2
LT		5.8	▲ 2.8	▲ 0.2
LU		13.5	▲ 6.7	▼ 5.6
HU		0.8	▼ 2.5	▼ 1.4
MT		3.1	▲ 3.1	▼ 5.7
NL		3.3	▲ 2.2	▼ 0.5
AT		10.4	▲ 3.7	▲ 0.9
PL		3.7	▲ 0.5	▲ 2.9
PT		4.0	▲ 0.8	▼ 3.7
RO		10.1	▲ 4.2	▲ 3.7
SI		2.9	▼ 0.6	▼ 1.6
SK		2.5	▼ 5.1	▼ 1.5
FI		0.0	=	▼ 1.3
SE		2.5	▲ 2.5	▼ 1.3
IS		0.0	=	▼ 1.8
NO		1.7	▲ 1.7	▼ 14.0
UK		0.0	=	▼ 8.1

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers selling in other EU countries (N=3107)

The analysis of company characteristics shows the following differences:

Companies that have experienced competitors in other EU countries **writing fake reviews which are in fact hidden adverts or hidden attacks on competitors** are most likely to be found in the following groups:

- o service sector (3.5%), and particularly sector I: 4.6%. They are less likely to belong to the trade sector (1.8%);
- o companies selling services: 3.7%;
- o companies selling in four or more languages: 8.6%.

Retailers that have experienced competitors in other EU countries **pressuring consumers with persistent commercial calls or message** are most likely to be found in the following groups:

- o medium sized companies: 3.1%;
- o companies that sell services: 2.5%;
- o companies that sell in two (2.7%) or four or more languages (5.1%).

Companies that have experienced competitors in other EU countries **advertising falsely that a product is available only for a limited period** are most likely to be found in the following groups:

- o service sector N (5.1%) or sector I (3.1%). They are less likely to be in the trade sector (1.3%);
- o companies that sell services: 2.7%;
- o companies that sell in three (3.9%) or four or more (5.3%) languages.

Retailers that have experienced competitors in other EU countries **offering products as free of charge even if they actually entail substantial charges** are more likely to sell in four or more languages (2.5%).

Companies that have experienced competitors in other EU countries **sending unsolicited products to consumers, asking them to pay for the products** are most likely to be found amongst retailers in service sector S (2.6%), or amongst companies that sell services (1.6%).

2.2. Compliance with consumer legislation

































Retailers were asked their opinions about **the ease and costs of compliance with consumer legislation**, and the extent to which **competitors in their sector comply with this legislation**, both in their own country and in other countries (for retailers that sell cross-border). For the perceived compliance with consumer legislation, index variable Cc2_r has been calculated based upon retailers' responses on to what extent they agree with three statements about compliance.





a) Compliance perceptions, domestically

At EU27_2019 level, a retail company agrees on average with just over two of the statements related to compliance with consumer legislation in their own country. The average agreement rate is 67.7%.

Retailers in the eastern region (63.0%) have the lowest agreement rate, particularly compare to those in the north (70.7%).

CC2_r Perception of compliance
(AVERAGE RATE OF AGREEMENT)

		2018	2018-2016	2016-2014
EU27_2019		67.7	▲ 1.0	▲ 0.1
EU28		69.0	▲ 0.9	▼ 0.1
REGION NORTH		70.7	▲ 0.3	▲ 0.7
REGION SOUTH		67.9	▲ 5.3	▲ 2.4
REGION EAST		63.0	▲ 2.1	▲ 0.3
REGION WEST		68.5	▼ 1.5	▼ 1.6
BE		71.4	▲ 0.6	▼ 1.8
BG		53.9	▼ 3.7	▲ 2.1
CZ		54.8	▲ 1.9	▼ 5.7
DK		69.1	▲ 2.0	▲ 0.4
DE		64.6	▼ 3.7	▼ 4.9
EE		73.2	▼ 3.7	▲ 4.6
IE		79.9	▲ 7.3	▲ 2.6
EL		59.8	▼ 3.1	▲ 1.0
ES		60.8	▼ 1.7	▲ 3.0
FR		76.4	▲ 3.4	▲ 5.9
HR		62.1	▼ 2.7	▲ 8.6
IT		77.4	▲ 14.1	▲ 1.6
CY		63.1	▲ 1.0	▲ 0.8
LV		65.4	▼ 0.8	▼ 5.8
LT		63.4	▼ 4.0	▲ 2.9
LU		80.5	▲ 4.4	▼ 1.3
HU		63.4	▲ 5.8	▼ 4.6
MT		72.9	▲ 5.7	▲ 1.1
NL		72.8	▼ 0.8	▼ 1.0
AT		71.7	▲ 3.8	▼ 0.5
PL		63.0	▲ 1.1	▲ 4.5
PT		59.8	▼ 0.5	▲ 5.8
RO		75.4	▲ 4.4	=
SI		60.6	▲ 2.3	▲ 3.5
SK		55.8	▼ 1.6	▼ 3.3
FI		77.9	▲ 1.9	▼ 1.5
SE		72.0	▲ 0.3	▲ 0.6
IS		74.1	▲ 0.1	▲ 0.4
NO		72.5	▲ 0.5	▼ 1.0
UK		77.4	▲ 1.1	▼ 3.6

	Results statistically significantly higher than EU results (T-test at 95% level)
	Results statistically significantly lower than EU results (T-test at 95% level)
	Statistically significant increase from one year to the other (T-test at 95% level)
	Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

- Retailers are more likely to be positive about compliance with consumer regulation in their own country than in other EU countries -

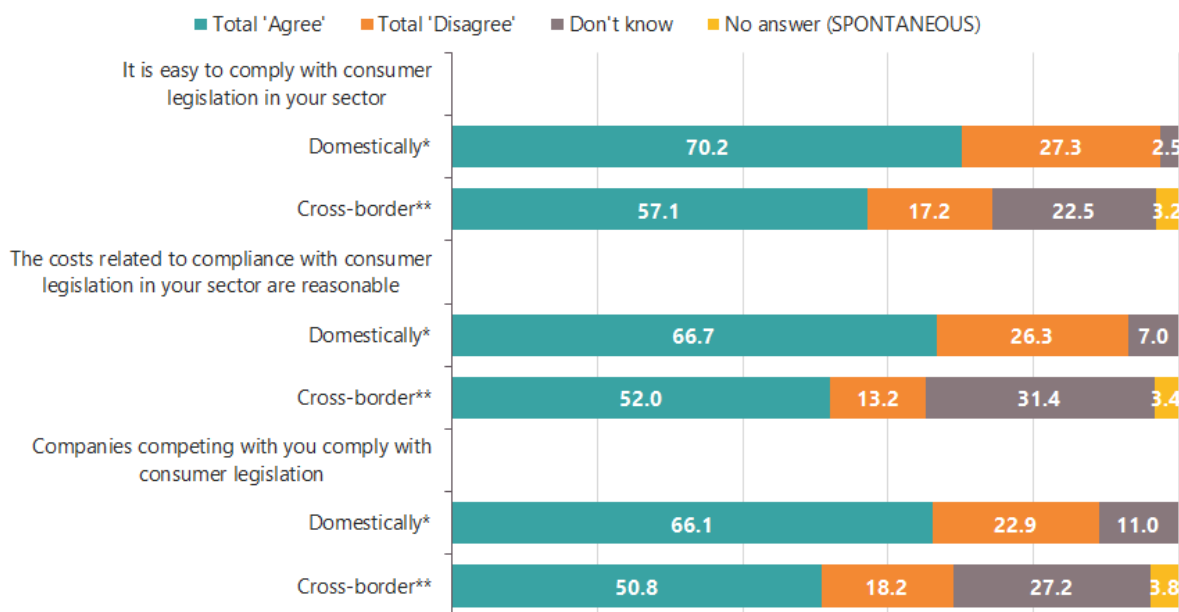
Retailers in EU27_2019 are most likely to agree it is **easy to comply with consumer legislation in their sector in their own country** (70.2%), with one in five strongly agreeing (21.6%). For retailers that sell cross-border to other EU countries, the majority also agrees it is **easy to comply with consumer legislation for their sector in other EU countries** (57.1%), although only 13.9% strongly agree.

More than two-thirds of retailers in EU27_2019 (66.7%) agree the **costs of compliance with consumer legislation in their sector are reasonable**, with 15.7% strongly agreeing. More than half (52.0%) of retailers who sell in other EU countries agree **costs related to compliance with consumer legislation are reasonable in other EU countries**, although fewer than one in ten strongly agree (9.4%).

Two-thirds of retailers (66.1%) in EU27_2019 agree their **competitors comply with consumer legislation in their own country**, with 15.8% saying they strongly agree. Amongst retailers that sell to other EU countries, 50.8% agree **companies competing with them in other EU countries comply with consumer legislation**, with fewer than one in ten (9.7%) strongly agreeing.

It is worth noting there is a much higher level of uncertainty about compliance when it comes to other EU countries, with more than one in five retailers in EU27_2019 that sell in these countries unable to answer each question.

Q10Q11 I will read you similar statements about compliance with consumer legislation in (OUR COUNTRY) / other EU countries. Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each of them: (% - EU27_2019)



Base (domestically): all retailers in EU27_2019 (N=9796)

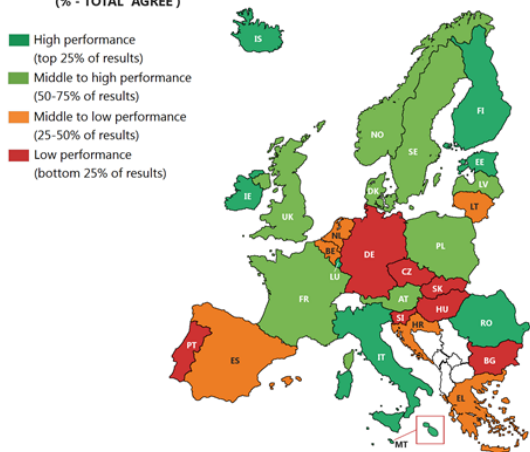
Base (cross-border): retailers in EU27_2019 selling in other EU countries (N=2921)

Across EU27_2019, there has been no change in the proportion of retailers that agree **domestic competitors comply with consumer legislation**. At country level, retailers in Italy (+16.5 pp) are now more likely to agree than in 2016, while those in Estonia are less likely to do so.

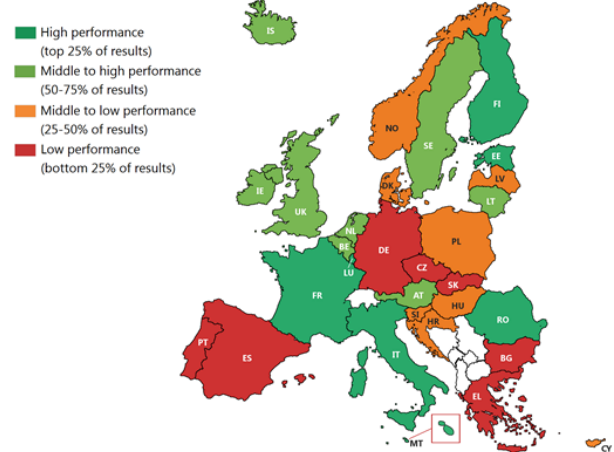
There has been no change in the proportion of EU27_2019 retailers that agree companies competing with them in **other EU countries** comply with consumer legislation. At a country level the largest increase is observed in Hungary (+16.2 pp).

The regional analysis shows retailers in the northern (73.7%) and southern (74.4%) regions are more likely to agree it is **easy to comply with consumer legislation** in their sector, compared to EU27_2019 as a whole. Those in the western region are more likely to agree **competitors in their country comply with consumer legislation** (71.4%), while those in the eastern and southern regions are less likely to do so. Companies in the north are more likely to agree the **costs of compliance are reasonable** (72.5%), compared to EU27_2019 as a whole.

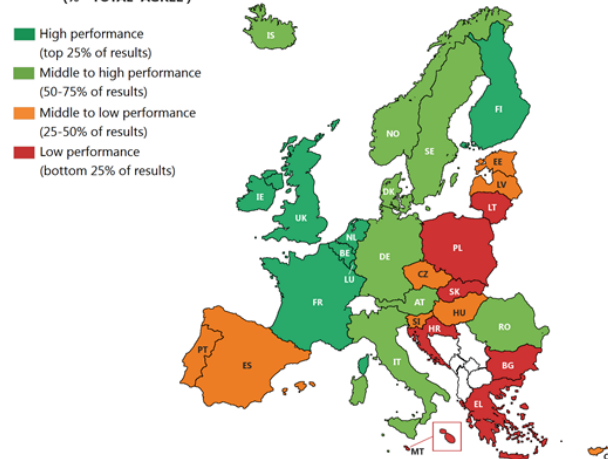
Q10.2 I will read you three statements about compliance with consumer legislation in (OUR COUNTRY). Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each of them:
It is easy to comply with consumer legislation in your sector
 (% - TOTAL 'AGREE')



Q10.3 I will read you three statements about compliance with consumer legislation in (OUR COUNTRY). Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each of them:
The costs of compliance with consumer legislation in your sector are reasonable
 (% - TOTAL 'AGREE')



Q10.1 I will read you three statements about compliance with consumer legislation in (OUR COUNTRY). Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each of them:
Your competitors comply with consumer legislation
 (% - TOTAL 'AGREE')



Base: All retailers (N=10747)

The majority of retailers in all countries agree **it is easy to comply with consumer legislation in their sector in their country**, with proportions ranging from 83.8% in Italy, 83.2% in Luxembourg and 82.4% in Malta to 51.5% in the Czech Republic, 53.9% in Slovakia and 57.1% in Slovenia. Large majorities in Iceland (82.0%) and Norway (79.7%) also agree.

In all but three countries, at least half of all retailers agree their **competitors comply with consumer legislation**, with those in Ireland (83.4%), France (79.0%) and the United Kingdom (77.5%) the most likely to do so. The exceptions are retailers in Bulgaria (42.7%), Malta (48.4%) and Poland (48.6%), but even in these countries almost half agree.

The majority of retailers in each country agree the **costs of compliance with consumer legislation in their sector are reasonable**, ranging from 88.1% in Malta, 82.8% in Romania and 82.2% in Luxembourg to 53.6% of retailers in the Czech Republic, 57.8% in Bulgaria and 57.9% in Spain.

b) Compliance perceptions, in other EU countries

Retailers in the eastern region (56.8%) are more likely to agree companies competing with them in other EU countries comply with consumer legislation, compared to EU27_2019. Companies in the southern region are more likely to agree it is easy to comply with consumer legislation in their sector in other EU countries (63.5%). Retailers in the northern region, on the other hand, are less likely to agree with each of these statements, compared to EU27_2019.

In 19 countries, at least half of all retailers that sell in other EU countries agree **the costs related to compliance with consumer legislation in their sector are reasonable in other EU countries**. Retailers in Luxembourg, Romania (both 71.3%) and Latvia (64.9%) are the most likely agree with this statement. At the other end of the scale, those in Sweden (34.2%), Poland (36.3%) and Germany (41.7%) are the least likely to do so¹².

In 20 countries, the majority of retailers that sell in other EU countries agree it is **easy to comply with consumer legislation in their sector in other EU countries**. More than two thirds of these retailers in Romania (78.9%), Luxembourg (74.0%) and Italy (65.5%) agree, compared to 34.2% in Sweden, 36.2% in Denmark and 38.2% in Estonia.

¹² Results for Cyprus (N=16), Norway (N=43), Finland (N=46) and Malta (N=47) are not included in the discussion due to very small sample size Cyprus. Results for the following countries are based on a small sample (50-99 observations) and should therefore be interpreted with caution: Luxembourg (N=54), Poland (N=57), Iceland (N=58), Romania (N=77), United Kingdom (N=85), Denmark (N=89), the Czech Republic (N=95), Estonia (N=99), the Netherlands (N=99). The same sample sizes apply to Q11.1, Q11.2 and Q11.3.

In 20 countries, at least half of the retailers that sell in other EU countries agree **companies competing with them in other EU countries comply with consumer legislation**. Three quarters of retailers in Luxembourg (75.2%) agree, as do 69.8% in Latvia and 69.3% in Greece. In contrast retailers in Finland (33.9%), Germany and Denmark (both 37.9%) are the least likely to agree.

Trends

EU27_2019 level trend analysis for companies complying with consumer legislation domestically or cross-border shows no changes since 2016. At a country level, the largest increase in the proportion of companies that agree companies competing with them **domestically** comply with consumer legislation is observed in Italy (+16.5 pp); the largest decrease is found amongst those in Estonia (-7.4 pp).

Retailers in Hungary recorded the highest increase in the proportion that agree it is easy to comply with consumer legislation in their sector in **other EU countries** (+16.2 pp).

Q10Q11.1 I will read you three statements about compliance with consumer legislation. Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each of them:

Companies competing with you comply with consumer legislation

(% - TOTAL 'AGREE')

	Domestically*			Cross-border**		
	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014
EU27_2019	66.1	▲ 1.0	▲ 2.4	50.8	▲ 1.5	▼ 1.8
EU28	67.7	▲ 0.6	▲ 2.4	51.7	▲ 2.4	▼ 2.2
REGION NORTH	65.9	▼ 0.4	▲ 3.5	44.1	▼ 1.5	▲ 2.3
REGION SOUTH	62.1	▲ 6.5	▲ 4.7	54.9	▼ 4.8	▼ 3.2
REGION EAST	54.4	▲ 0.8	▲ 2.8	56.8	▲ 1.9	▼ 2.4
REGION WEST	71.4	▼ 1.5	▼ 0.5	48.3	▲ 4.7	▼ 0.7
BE	73.8	▲ 0.9	▼ 2.0	61.0	▲ 7.6	▼ 3.9
BG	42.7	▼ 1.8	▲ 3.1	63.4	▲ 3.6	▲ 5.0
CZ	59.3	▲ 5.8	▼ 1.9	55.6	▼ 0.9	▼ 0.7
DK	64.8	▲ 0.4	▲ 2.2	37.9	▲ 2.3	▲ 0.5
DE	67.9	▼ 3.3	▼ 3.6	37.9	▲ 3.8	▼ 8.6
EE	60.7	▼ 7.4	▲ 6.2	44.2	▼ 2.1	▲ 5.3
IE	83.4	▲ 0.5	▲ 8.4	66.5	▲ 1.0	▲ 5.2
EL	50.6	▼ 3.3	▲ 4.6	69.3	▲ 0.4	▼ 7.1
ES	56.3	▼ 1.3	▲ 5.9	51.3	▼ 9.2	▼ 2.3
FR	79.0	▲ 1.8	▲ 6.8	60.9	▲ 2.9	▲ 13.7
HR	53.9	▼ 4.3	▲ 11.5	53.3	▲ 9.0	▲ 6.6
IT	71.4	▲ 16.5	▲ 5.1	52.7	▼ 4.5	▼ 4.2
CY	58.9	▲ 8.2	▼ 0.8	62.8	▲ 7.0	▼ 3.0
LV	55.9	▼ 0.6	▼ 6.0	69.8	▼ 0.8	▼ 4.8
LT	53.4	▼ 0.7	▲ 3.7	52.1	▼ 1.1	▼ 7.2
LU	75.9	▲ 0.2	▲ 2.2	75.2	▲ 3.0	▲ 27.9
HU	59.8	▲ 1.3	▲ 2.8	50.5	▲ 16.2	▼ 6.7
MT	48.4	▼ 8.5	▼ 3.6	57.5	▼ 15.5	▲ 13.4
NL	76.5	▲ 3.5	▼ 1.5	53.2	▲ 1.9	▲ 8.0
AT	72.7	▲ 2.8	▲ 1.3	48.1	▼ 7.7	▲ 18.1
PL	48.6	▲ 0.2	▲ 5.1	48.8	▼ 3.6	▼ 1.9
PT	54.6	▲ 3.6	▲ 2.3	51.0	▼ 3.6	▲ 1.7
RO	61.6	▼ 1.9	▲ 4.1	68.9	▼ 0.9	▼ 10.3
SI	58.7	▲ 1.6	▲ 6.5	59.6	▲ 4.6	▲ 6.8
SK	53.2	▲ 1.8	▼ 1.2	51.2	▲ 0.8	▼ 12.7
FI	75.1	▼ 0.2	▲ 0.8	33.9	▼ 12.4	▲ 4.7
SE	70.7	▼ 2.0	▲ 4.9	39.0	▲ 4.0	▲ 9.9
IS	63.9	▼ 1.8	▼ 1.8	53.6	▲ 15.0	▼ 12.8
NO	68.8	▲ 3.5	▼ 5.8	43.0	▲ 11.2	▼ 11.5
UK	77.5	▼ 1.3	▲ 0.2	60.8	▲ 10.6	▼ 6.3

- Results statistically significantly higher than EU results (T-test at 95% level)
- Results statistically significantly lower than EU results (T-test at 95% level)
- Statistically significant increase from one year to the other (T-test at 95% level)
- Statistically significant decrease from one year to the other (T-test at 95% level)

Base (domestically): all retailers (N=10747)

Base (cross-border): retailers selling in other EU countries (N=3107)

The EU27_2019 level trend analysis since 2016 shows no change in the proportion of retailers that agree it is **easy to comply with consumer legislation** in their sector in their country, or when it comes to cross-border legislation (+1.7 pp).

































At a country level, the largest increase in the proportion of companies that agree it is easy to comply with **domestic** consumer legislation in their sector is observed in Luxembourg (+11.7 pp) and Italy (+11.6 pp); the largest decrease is found amongst those in Germany (-6.5 pp).





Retailers in Hungary recorded the highest increase in the proportion that agree it is easy to comply with consumer legislation in their sector in **other EU countries** (+17.7 pp). During the same period the proportion of retailers in Austria that agree has declined (-17.5 pp).

Q10Q11.2 I will read you three statements about compliance with consumer legislation. Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each of them:

It is easy to comply with consumer legislation in your sector

(% - TOTAL 'AGREE')

	Domestically*			Cross-border**		
	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014
EU27_2019 	70.2	▼ 0.1	▼ 0.9	57.1	▲ 1.7	▼ 1.4
EU28 	71.5	▲ 0.3	▼ 1.6	58.1	▲ 3.1	▼ 2.0
REGION NORTH	73.7	▲ 3.0	▼ 1.3	41.3	▼ 5.9	▲ 1.1
REGION SOUTH	74.4	▲ 4.0	▲ 0.5	63.5	▼ 3.7	▲ 0.3
REGION EAST	68.3	▲ 2.7	▼ 0.7	58.2	▲ 2.2	▼ 2.7
REGION WEST	68.4	▼ 3.5	▼ 1.6	55.7	▲ 4.7	▼ 1.3
BE 	66.8	▼ 1.1	▼ 1.1	55.6	▼ 15.8	▲ 7.7
BG 	61.2	▼ 6.1	▲ 0.2	52.7	▼ 7.1	▼ 1.6
CZ 	51.5	▲ 0.3	▼ 8.4	53.0	▲ 5.0	▼ 4.9
DK 	72.9	▲ 7.5	▼ 2.6	36.2	▼ 5.7	▲ 1.9
DE 	65.6	▼ 6.5	▼ 4.8	54.1	▲ 11.6	▼ 9.5
EE 	82.1	▼ 3.8	▲ 6.8	38.2	▼ 4.0	▲ 4.6
IE 	80.0	▲ 7.5	▲ 1.3	62.9	▲ 3.0	▼ 4.6
EL 	67.1	▼ 2.1	▲ 2.1	64.5	▼ 3.2	▼ 7.6
ES 	68.0	▼ 2.8	▲ 1.9	60.5	▼ 3.1	▼ 1.3
FR 	73.5	▲ 3.3	▲ 4.3	61.3	▼ 1.1	▲ 13.4
HR 	67.4	▼ 1.7	▲ 6.4	62.3	▲ 8.2	▼ 5.1
IT 	83.8	▲ 11.6	▼ 2.4	65.5	▼ 7.1	▲ 1.4
CY 	66.6	▼ 3.8	▲ 1.9	55.7	▲ 7.4	▲ 3.5
LV 	74.6	▲ 3.2	▼ 5.3	59.2	▼ 0.9	▼ 9.9
LT 	65.8	▼ 6.1	▲ 1.1	51.9	▼ 11.6	▼ 1.3
LU 	83.2	▲ 11.7	▼ 6.1	74.0	▲ 2.7	▲ 18.4
HU 	64.8	▲ 8.6	▼ 7.3	57.8	▲ 17.7	▼ 13.2
MT 	82.4	▲ 8.5	▲ 8.3	51.8	▼ 15.4	▲ 18.4
NL 	70.4	▼ 6.1	▼ 0.3	54.4	▼ 8.1	▲ 6.7
AT 	72.1	▲ 3.5	▼ 3.2	42.1	▼ 17.5	▲ 15.3
PL 	75.3	▲ 3.4	▲ 4.8	55.0	▼ 15.3	▲ 12.6
PT 	62.3	▼ 0.6	▲ 5.9	64.4	▲ 4.0	▼ 1.3
RO 	82.0	▲ 6.3	▲ 0.1	78.9	▲ 7.4	▼ 14.9
SI 	57.1	▲ 1.5	▲ 1.8	49.9	▲ 1.9	▲ 5.4
SK 	53.9	▼ 3.2	▼ 6.8	42.3	▼ 6.0	▼ 7.2
FI 	81.0	▲ 6.2	▼ 3.1	42.3	▼ 17.9	▲ 3.0
SE 	72.0	▲ 3.7	▼ 1.4	34.2	▲ 3.9	▲ 4.1
IS 	82.0	▲ 2.4	▼ 1.6	72.4	▲ 13.6	▼ 6.1
NO 	79.7	▼ 3.2	▲ 4.8	53.9	▲ 2.2	▼ 4.6
UK 	79.6	▲ 3.5	▼ 8.2	67.9	▲ 17.0	▼ 9.3

-  Results statistically significantly higher than EU results (T-test at 95% level)
-  Results statistically significantly lower than EU results (T-test at 95% level)
-  Statistically significant increase from one year to the other (T-test at 95% level)
-  Statistically significant decrease from one year to the other (T-test at 95% level)

Base (domestically): all retailers (N=10747)

































Base (cross-border): retailers selling in other EU countries (N=3107)

Since 2016, the proportion of EU27_2019 retailers that agree costs related to compliance with consumer legislation in their sector are reasonable **domestically** has increased (+1.9 pp). At country level, companies in Malta recorded the largest increase in the proportion that agree the costs of compliance with **domestic** consumer legislation in their sector are reasonable (+17.2 pp).


The proportion of EU27_2019 retailers that agree costs related to compliance with consumer legislation in their sector are reasonable **in other EU countries** has also increased since 2016 (+4.7 pp), reversing the trend seen in the last wave. At a country level, retailers in Hungary (+18.7 pp) are now much more likely to agree.


Q10Q11.3 I will read you three statements about compliance with consumer legislation. Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each of them:


The costs related to compliance with consumer legislation in your sector are reasonable
(% - TOTAL 'AGREE')

	Domestically*			Cross-border**		
	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014
EU27_2019 	66.7	▲ 1.9	▼ 1.1	52.0	▲ 4.7	▼ 3.9
EU28 	67.8	▲ 1.6	▼ 1.1	53.5	▲ 5.9	▼ 4.0
REGION NORTH	72.5	▼ 1.7	▲ 0.1	46.6	▲ 1.3	▼ 6.1
REGION SOUTH	67.4	▲ 5.6	▲ 2.1	57.9	▲ 1.1	▼ 2.2
REGION EAST	66.3	▲ 2.7	▼ 1.5	52.1	▲ 2.2	▼ 4.5
REGION WEST	65.6	▲ 0.5	▼ 2.9	50.0	▲ 7.3	▼ 3.2
BE 	73.5	▲ 1.8	▼ 2.2	56.2	▼ 11.0	▲ 2.8
BG 	57.8	▼ 3.2	▲ 3.1	46.6	▼ 3.0	▲ 0.8
CZ 	53.6	▼ 0.2	▼ 6.5	51.1	▲ 1.3	▼ 0.5
DK 	69.6	▼ 1.9	▲ 1.3	49.4	▲ 11.1	▼ 5.9
DE 	60.3	▼ 1.2	▼ 6.5	41.7	▲ 11.4	▼ 9.8
EE 	76.8	▲ 0.1	▲ 0.6	42.4	▲ 6.6	▲ 2.3
IE 	76.4	▲ 14.1	▼ 1.8	62.8	▲ 7.9	▼ 6.9
EL 	61.5	▼ 4.0	▼ 3.7	64.9	▲ 10.8	▼ 17.4
ES 	57.9	▼ 1.1	▲ 1.2	52.9	▼ 3.7	▼ 2.1
FR 	76.9	▲ 5.3	▲ 6.3	63.1	▲ 1.8	▲ 7.3
HR 	65.1	▼ 2.1	▲ 7.7	50.4	▲ 0.3	▼ 0.4
IT 	77.1	▲ 14.4	▲ 2.1	58.8	▲ 0.5	=
CY 	64.0	▼ 1.3	▲ 1.4	74.6	▲ 41.5	▼ 28.0
LV 	65.6	▼ 4.9	▼ 6.1	64.9	▼ 1.9	▼ 3.0
LT 	71.2	▼ 5.0	▲ 3.9	56.5	▲ 3.4	▼ 14.8
LU 	82.2	▲ 1.2	▼ 0.2	71.3	▼ 2.2	▲ 11.4
HU 	65.5	▲ 7.3	▼ 9.2	55.1	▲ 18.7	▼ 9.6
MT 	88.1	▲ 17.2	▼ 1.7	55.5	▼ 6.2	▲ 24.4
NL 	71.6	▲ 0.4	▼ 1.4	55.3	▼ 9.1	▲ 10.3
AT 	70.1	▲ 4.9	▲ 0.4	42.6	▼ 3.1	▲ 12.5
PL 	65.1	▼ 0.3	▲ 3.8	36.3	▼ 14.1	▼ 2.8
PT 	62.4	▼ 4.5	▲ 9.1	57.0	▲ 0.1	▲ 2.0
RO 	82.8	▲ 8.9	▼ 4.2	71.3	▲ 8.6	▼ 18.4
SI 	66.3	▲ 4.1	▲ 2.1	52.7	▲ 1.3	▲ 4.3
SK 	60.3	▼ 3.5	▼ 1.9	49.3	▼ 4.2	▼ 7.1
FI 	77.7	=	▼ 2.3	56.0	▼ 2.8	▼ 5.8
SE 	73.3	▼ 0.7	▼ 1.6	34.2	▲ 1.6	▼ 6.6
IS 	76.5	▼ 0.1	▲ 4.5	66.6	▲ 25.0	▼ 14.8
NO 	68.9	▲ 1.0	▼ 2.1	54.8	▲ 10.7	▼ 8.0
UK 	75.3	▲ 1.3	▼ 3.0	68.0	▲ 17.1	▼ 7.3

 Results statistically significantly higher than EU results (T-test at 95% level)

 Results statistically significantly lower than EU results (T-test at 95% level)

 Statistically significant increase from one year to the other (T-test at 95% level)

 Statistically significant decrease from one year to the other (T-test at 95% level)

Base (domestically): all retailers (N=10747)

Base (cross-border): retailers selling in other EU countries (N=3107)

The analysis of company characteristics for factors relating to **domestic consumer legislation** shows a range of differences:

Companies that agree it is **easy to comply with consumer legislation in their sector** are more likely to belong to sector N (81.7%), sector S (80.7%), sector J (75.5%) or sector H (74.8%), or to be companies where the respondent is a marketing manager (74.8%). They are less likely to belong to sector K – financial and insurance service activities (61.5%), or sector I (68.0%). They are also less likely to sell food products (65.7%).

Retailers that **agree their competitors comply with consumer legislation** are more likely to:

- o belong to sector N (77.4%), sector L (74.4%) or sector K (72.1%);
- o be medium (73.3%) or large (74.2%) companies;
- o have been established before 1990: 69.3%;
- o sell cross-border: 71.5%;
- o sell non-food products: 68.5%;
- o be companies where the respondent is a marketing manager (73.1%) or a commercial/sales manager (69.6%).

Companies that **agree the costs of compliance with consumer legislation in their sector are reasonable** are more likely to be found amongst those that:

- o belong to sector S (76.3%), sector L (74.2%) or sector N (73.8%), and least likely to be found amongst retailers that belong to sector K (58.5%) or sector I (64.6%);
- o are medium (70.5%) or large (77.2%) retailers;
- o are companies where the respondent is a marketing manager: 73.8%.

The analysis of company characteristics (for companies that sell in other EU countries) for factors relating to **consumer legislation in other EU countries** shows the following differences:

Retailers that agree it is **easy to comply with consumer legislation in their sector in other EU countries** are more likely to be in sector J (67.7%) or sector H (62.9%), but less likely to be in the trade sector (53.2%). They are more likely to be medium sized companies (62.4%), to have been established in 2000 or later (60.8%) or to sell in four or more languages (62.2%).

Retailers that **agree companies competing with them in other EU countries comply with consumer legislation** are more likely to be medium-sized (56.7%) or to have been created between 1990 and 1999 (56.6%). However, they are less likely to be in the trade sector (46.4%).

Companies that **agree the costs related to compliance with consumer legislation in their sector are reasonable in other EU countries** are more likely to be in sector S (68.9%) or sector H (62.5%), but less likely to be in trade (43.3%) or service sector N (36.1%). They are more likely to be medium-sized (60.5%), sell in three languages (61.6%), or be a retailer where the respondent is a marketing manager (63.5%).

2.3. Enforcement of consumer and product safety regulation

Retailers were asked their opinions about the **monitoring and enforcement of consumer and product safety legislation** by a range of authorities and other bodies. For this, they were asked whether or not they agreed with five statements shown in the graph below.

a) Enforcement of consumer legislation and product safety legislation

As for previous topics, an aggregate index was calculated to observe the level to which retailers agree that consumer and product safety legislation is enforced in their country. The index is built using retailers' agreement or disagreement with five statements¹³. The index measures the level of agreement in a percentage scale, where 100% means agreement with all five statements. On average, a company in EU27_2019 agrees with just over three of the five (60.1%) statements related to the monitoring and enforcement of consumer and product safety legislation in their own country. However, this rate of agreement varies between statements, and across regions and countries.

































The overall rate of agreement is higher amongst countries in the northern (64.9%) region, compared to the east (56.8%).





At a country level, the highest average agreement is observed amongst retailers in France (77.2%), Ireland (75.4%) and Hungary (74.8%), and the lowest in Poland (47.6%), Slovakia and Croatia (both 47.8%).

Compared to 2016, the largest increase within EU27_2019 is recorded in Denmark (+9.6 pp), and the largest decrease in Malta (-6.5 pp).

¹³ The answers used to compute this index are those to the five items of Q8 (respectively about enforcement of consumer legislation by public authorities, NGOs, self-regulatory bodies and the media, as well as enforcement of product safety legislation by public authorities). Each respondent was assigned a score of 1 per item when answered that they "agree" or "strongly agree" with the statement. EC2_r is calculated at the level of country averages (see table on page 66). It is important to note that Q8.5 (on enforcement of product safety legislation by public authorities) has been asked only to retailers that sell non-food products. Therefore, the average level of agreement amongst this subgroup of retailers was used for the calculation of the average score in the composite index for all retailers in one country.

EC2_r Enforcement of consumer and product safety legislation
(AVERAGE RATE OF AGREEMENT)

		2018	2018-2016	2016-2014	2014-2012
EU27_2019		60.1	=	▲ 0.6	▼ 4.8
EU28		61.9	▼ 0.1	▲ 0.1	▼ 4.9
REGION NORTH		64.9	▲ 2.1	▲ 1.9	▼ 4.0
REGION SOUTH		60.7	▲ 3.2	▲ 4.2	▼ 6.8
REGION EAST		56.8	▲ 4.7	▼ 1.0	▼ 7.0
REGION WEST		60.0	▼ 3.4	▼ 1.3	▼ 2.9
BE		69.8	▼ 2.5	▲ 2.2	▲ 1.1
BG		49.0	▲ 3.7	▼ 1.6	▼ 11.2
CZ		53.3	▲ 4.7	▲ 2.3	▼ 5.7
DK		69.0	▲ 9.6	▼ 4.1	▼ 6.8
DE		52.4	▼ 4.4	▼ 2.0	▼ 4.7
EE		50.7	▼ 1.6	▼ 2.3	▲ 3.7
IE		75.4	▼ 0.4	▲ 2.3	▼ 2.8
EL		53.9	▲ 4.6	▼ 1.0	▼ 0.7
ES		52.7	▲ 0.2	▲ 3.1	▼ 13.0
FR		77.2	▼ 1.5	▲ 5.0	▲ 0.6
HR		47.8	▲ 1.4	▲ 1.5	▼ 8.1
IT		68.7	▲ 5.6	▲ 4.5	▼ 1.7
CY		56.4	▲ 2.9	▼ 2.5	▲ 0.3
LV		52.3	▲ 1.2	▼ 3.8	▲ 1.6
LT		63.2	▲ 2.1	▲ 7.0	▼ 5.3
LU		70.7	▼ 1.3	▲ 6.5	▼ 7.0
HU		74.8	▲ 8.5	▼ 4.1	▲ 0.2
MT		65.2	▼ 6.5	▲ 15.1	▼ 3.5
NL		67.7	▲ 1.1	▼ 0.1	▼ 2.6
AT		65.1	▲ 7.1	▼ 0.7	▼ 7.3
PL		47.6	▲ 4.4	▲ 3.6	▼ 12.5
PT		60.3	▼ 4.0	▲ 8.2	▼ 12.5
RO		68.1	▲ 1.9	▼ 4.3	▼ 4.6
SI		57.7	▲ 3.3	▲ 4.3	▼ 7.2
SK		47.8	▼ 3.5	▲ 0.5	▼ 4.4
FI		72.5	▼ 2.3	▲ 1.3	▼ 0.1
SE		65.3	▼ 0.9	▲ 7.1	▼ 4.9
IS		48.8	▼ 8.3	▲ 9.8	▼ 7.6
NO		74.4	▲ 5.2	▼ 8.7	▲ 6.4
UK		73.1	=	▼ 4.0	▼ 6.4

	Results statistically significantly higher than EU results (T-test at 95% level)
	Results statistically significantly lower than EU results (T-test at 95% level)
	Statistically significant increase from one year to the other (T-test at 95% level)
	Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747) for four questions composing the indicator
 Retailers selling non-food products (N=4542) for one of the questions composing the indicator

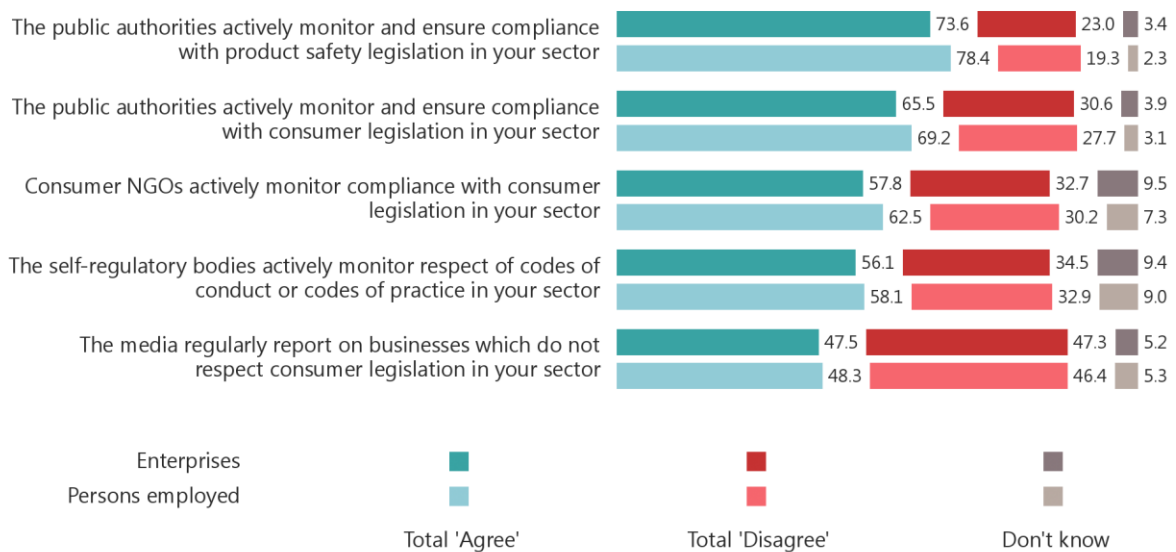
- More than six in ten retailers agree public authorities actively monitor and ensure compliance with product safety legislation and consumer legislation in their sector –

Almost three quarters of companies (73.6%) in EU27_2019 agree **public authorities actively monitor and ensure compliance with product safety legislation in their sector**, while almost two-thirds (65.5%) agree **public authorities actively monitor and ensure compliance with consumer legislation in their sector**.

More than half of all companies (57.8%) in EU27_2019 agree **consumer NGOs actively monitor compliance with consumer legislation**, while almost as many (56.1%) agree **self-regulatory bodies actively monitor respect of codes of conduct or codes of practice in their sector**.

Finally, almost half of all companies (47.5%) in EU27_2019 agree **the media regularly report on businesses which do not respect consumer legislation in their sector**.

Q8 Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each of the following statements.
In (OUR COUNTRY):
(% - EU27_2019)

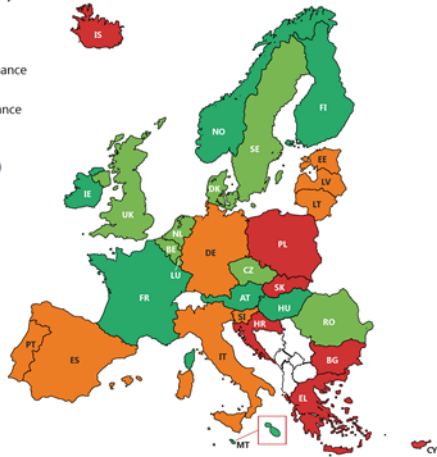


Base: All retailers in EU27_2019 (N=9796)

Base for 'The public authorities actively monitor and ensure compliance with product safety legislation in your sector': All retailers in EU27_2019 selling non-food products (N=4061)

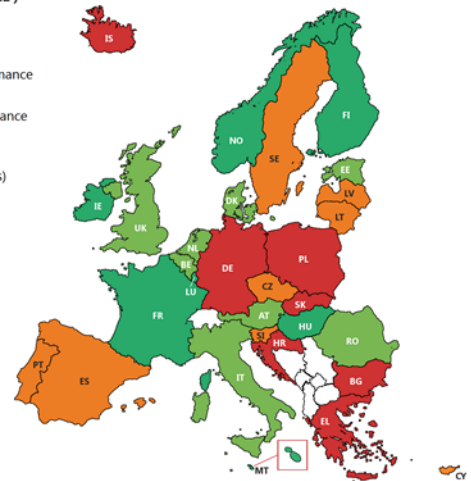
Q8.5 Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each of the following statements. In (OUR COUNTRY):
The public authorities actively monitor and ensure compliance with product safety legislation in your sector
 (% - TOTAL 'AGREE')

- High performance (top 25% of results)
- Middle to high performance (50-75% of results)
- Middle to low performance (25-50% of results)
- Low performance (bottom 25% of results)



Q8.1 Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each of the following statements. In (OUR COUNTRY):
The public authorities actively monitor and ensure compliance with consumer legislation in your sector
 (% - TOTAL 'AGREE')

- High performance (top 25% of results)
- Middle to high performance (50-75% of results)
- Middle to low performance (25-50% of results)
- Low performance (bottom 25% of results)



Q8.4 Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each of the following statements. In (OUR COUNTRY):
The media regularly report on businesses which do not respect consumer legislation in your sector
 (% - TOTAL 'AGREE')

- High performance (top 25% of results)
- Middle to high performance (50-75% of results)
- Middle to low performance (25-50% of results)
- Low performance (bottom 25% of results)



Q8.5: Base: All retailers selling non-food products (N=4542)

Q8.1, Q8.4: Base: All retailers (N=10747)

Retailers in the northern region of EU27_2019 are more likely to agree **public authorities actively monitor and ensure compliance with consumer legislation** (73.5%) or with **product safety legislation**, compared to EU27_2019 as a whole. Those in northern (62.1%) and southern (63.8%) regions are more likely to agree **self-regulatory bodies actively monitor respect of codes of conduct or codes of practice**. Retailers in the eastern region are less likely to agree with each statement, compared to EU27_2019 overall.

































In each country, the majority of retailers agree **public authorities actively monitor and ensure compliance with product safety legislation** in their sector. Proportions vary from 89.3% in France, 88.6% in Hungary and 87.2% in Ireland to 59.3% in Poland, 61.1% in Bulgaria and 61.4% in Slovakia and Greece¹⁴.





Since 2016, the proportion of EU27_2019 retailers that agree with this statement has not changed. At country level, the largest increase in the proportion that agrees **public authorities actively monitor and ensure compliance with product safety legislation** in their sector can be seen amongst retailers in Austria (+14.2 pp).

¹⁴ Results for Cyprus (n=50), Luxembourg (n=55) and Malta (n=57) are based on a small sample so should be interpreted with caution.

Q8.5 Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each of the following statements. In (OUR COUNTRY):

The public authorities actively monitor and ensure compliance with product safety legislation in your sector (% - TOTAL 'AGREE')

	2018	2018-2016	2016-2014	2014-2012
EU27_2019 	73.6	▲ 0.8	▲ 1.7	▼ 8.3
EU28 	74.8	▲ 0.1	▲ 1.1	▼ 7.5
REGION NORTH	80.2	▲ 5.1	▲ 1.2	▼ 6.5
REGION SOUTH	68.5	▲ 1.0	▲ 6.0	▼ 13.5
REGION EAST	71.1	▲ 6.6	▲ 0.2	▼ 11.1
REGION WEST	74.9	▼ 1.8	▼ 0.8	▼ 5.1
BE 	82.0	▼ 2.0	▲ 1.3	▲ 0.5
BG 	61.1	▼ 0.3	▲ 5.7	▼ 15.7
CZ 	78.8	▲ 6.7	▲ 6.9	▼ 2.0
DK 	81.7	▲ 10.7	▼ 5.0	▼ 7.0
DE 	68.4	▼ 2.9	▼ 2.5	▼ 7.4
EE 	67.4	▼ 1.9	▲ 0.4	▼ 2.4
IE 	87.2	▲ 4.6	▲ 2.1	▲ 4.6
EL 	61.4	▲ 10.3	▼ 2.7	▼ 8.6
ES 	67.7	▲ 3.2	▲ 7.1	▼ 22.4
FR 	89.3	▲ 0.6	▲ 8.1	▼ 5.2
HR 	63.3	▲ 1.4	▲ 12.7	▼ 23.9
IT 	70.1	▼ 1.9	▲ 5.8	▼ 9.8
CY 	66.8	▲ 7.5	▲ 4.0	▼ 5.0
LV 	70.8	▲ 4.2	▼ 1.1	▼ 6.3
LT 	74.5	▲ 8.1	▼ 3.5	▼ 0.6
LU 	80.7	▼ 4.9	▲ 4.0	▼ 7.0
HU 	88.6	▲ 4.7	▲ 1.6	▼ 4.9
MT 	85.6	▲ 6.1	▲ 7.9	▲ 1.6
NL 	80.1	▲ 1.6	▼ 3.0	▲ 2.0
AT 	83.3	▲ 14.2	▼ 7.7	▼ 7.1
PL 	59.3	▲ 8.8	▲ 1.0	▼ 17.7
PT 	68.9	▼ 6.1	▲ 8.9	▼ 7.0
RO 	81.7	▲ 11.1	▼ 7.7	▼ 9.8
SI 	77.6	▲ 6.1	▲ 3.9	▼ 9.4
SK 	61.4	▼ 3.8	▲ 4.3	▼ 12.0
FI 	86.9	▼ 2.0	▲ 0.4	▼ 0.4
SE 	82.3	▲ 4.0	▲ 8.4	▼ 12.6
IS 	65.6	▼ 6.2	▲ 17.0	▼ 15.0
NO 	85.6	▲ 6.9	▼ 9.4	▲ 4.4
UK 	82.1	▼ 5.4	▲ 0.7	▼ 3.7

 Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers selling non-food products (N=4542)

In all but one country, at least half of all retailers agree **public authorities actively monitor and ensure compliance with consumer legislation** in their sector, with those in Malta (85.0%), Luxembourg (84.8%) and France (82.3%) the most likely to do so. This compares to 48.1% in Poland, 50.3% in Croatia and 54.7% in Slovakia.

At the EU27_2019 level, there has been no change since 2016. At a country level, retailers in Denmark show the largest increase in agreement (+11.1 pp).

Q8.1 Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each of the following statements. In (OUR COUNTRY):

The public authorities actively monitor and ensure compliance with consumer legislation in your sector (% - TOTAL 'AGREE')

	2018	2018-2016	2016-2014	2014-2012	2012-2011	2011-2010	2010-2009
EU27_2019	65.5	▲ 1.0	▲ 1.9	▼ 10.5	▲ 4.1	▲ 0.3	▼ 5.0
EU28	67.5	▲ 0.8	▲ 1.3	▼ 9.8	▲ 4.1	▲ 1.2	▼ 4.1
REGION NORTH	73.5	▲ 3.4	▲ 2.3	▼ 9.0	▲ 10.9	▲ 3.7	▼ 11.0
REGION SOUTH	65.9	▲ 5.8	▲ 5.6	▼ 11.2	▲ 1.6	▼ 3.3	▼ 5.4
REGION EAST	62.7	▲ 5.6	▼ 1.1	▼ 11.2	▲ 2.4	▲ 4.2	▼ 5.6
REGION WEST	65.1	▼ 3.0	▲ 0.4	▼ 10.2	▲ 4.8	▲ 0.5	▼ 3.4
BE	76.6	▼ 1.8	▼ 1.3	▼ 1.3	▼ 1.0	▲ 20.3	▼ 18.0
BG	54.8	▲ 6.3	▲ 1.1	▼ 15.3	▲ 8.4	▼ 8.0	▲ 5.5
CZ	64.6	▲ 4.8	▲ 7.1	▼ 5.7	▼ 3.4	▲ 6.0	▼ 14.5
DK	76.5	▲ 11.1	▼ 3.1	▼ 13.2	▲ 10.4	▼ 3.8	▼ 7.5
DE	56.9	▼ 4.4	▲ 0.6	▼ 14.0	▲ 7.8	▼ 2.5	▼ 3.6
EE	76.2	▲ 4.3	▼ 3.4	▲ 1.8	▲ 15.6	▼ 5.1	▼ 1.4
IE	80.9	▼ 0.7	▲ 3.8	▼ 7.3	▲ 12.0	▼ 8.0	▼ 1.2
EL	57.3	▲ 6.1	▲ 3.2	▼ 4.1	▼ 1.9	▲ 3.9	▼ 2.2
ES	59.1	▲ 5.2	▲ 4.7	▼ 18.3	▲ 5.0	▼ 6.8	▼ 2.0
FR	82.3	▼ 1.2	▲ 6.6	▼ 4.5	▲ 0.9	▲ 0.5	▲ 1.9
HR	50.3	▲ 3.8	▼ 0.3	▼ 13.5	N.A	N.A	N.A
IT	73.0	▲ 6.6	▲ 4.9	▼ 5.4	▲ 0.6	▼ 4.0	▼ 7.8
CY	62.9	▲ 7.5	▼ 5.4	▼ 0.4	▲ 6.5	▼ 3.0	▼ 12.2
LV	66.7	▲ 0.3	▼ 0.7	▲ 0.2	▼ 2.8	▲ 9.7	▼ 12.8
LT	70.5	▲ 7.7	▲ 5.7	▼ 15.7	▲ 5.2	▲ 7.2	▲ 2.4
LU	84.8	▲ 1.8	▲ 4.7	▼ 2.6	▲ 10.3	▲ 15.3	▼ 29.7
HU	81.5	▲ 4.5	▼ 4.4	▼ 3.6	▲ 12.0	▼ 1.9	▼ 2.5
MT	85.0	▲ 1.7	▲ 24.2	▼ 12.1	▲ 16.0	▼ 5.7	▼ 23.6
NL	73.2	▲ 4.1	▼ 1.2	▼ 3.7	▼ 5.5	▲ 16.9	▼ 10.9
AT	73.5	▲ 5.3	▲ 3.2	▼ 17.7	▲ 4.9	▼ 0.9	▼ 3.3
PL	48.1	▲ 4.6	▼ 1.2	▼ 15.2	▲ 2.1	▼ 4.9	▲ 8.7
PT	66.8	▼ 1.9	▲ 10.9	▼ 15.8	▼ 7.6	▲ 10.0	▼ 13.1
RO	76.4	▲ 4.6	▼ 3.1	▼ 12.6	▼ 0.2	▲ 21.3	▼ 14.8
SI	65.6	▲ 5.0	▲ 6.4	▼ 14.2	▲ 13.4	▼ 5.1	▼ 17.6
SK	54.7	▼ 1.2	▼ 0.7	▼ 9.4	▼ 1.6	▲ 17.9	▼ 25.1
FI	80.7	▼ 3.2	▲ 1.8	▼ 2.3	▲ 10.4	▼ 7.7	▲ 0.9
SE	70.7	▼ 0.6	▲ 7.0	▼ 8.2	▲ 18.0	▲ 10.7	▼ 26.8
IS	48.0	▼ 14.6	▲ 7.0	▼ 3.4	▲ 4.5	▼ 4.9	▼ 11.1
NO	82.8	▲ 8.0	▼ 9.5	▲ 2.9	▲ 10.1	▼ 2.9	▼ 3.4
UK	79.7	▲ 0.3	▼ 5.0	▼ 4.9	▲ 5.5	▲ 8.1	▲ 1.2

Results statistically significantly higher than EU results (T-test at 95% level)

Results statistically significantly lower than EU results (T-test at 95% level)

Statistically significant increase from one year to the other (T-test at 95% level)

Statistically significant decrease from one year to the other (T-test at 95% level)

































Base: All retailers (N=10747)





In 21 countries, the majority of retailers agree **self-regulatory bodies actively monitor respect of codes of conduct or codes of practice** in their sector. Retailers in Luxembourg (79.0%), Ireland (77.2%) and Finland (75.4%) are the most likely to agree, while those in the Czech Republic (39.5%), Estonia (40.0%), and Slovakia (41.0%) are the least likely to agree. Outside EU27_2019, retailers in Iceland (39.6%) are amongst the least likely to agree, although this still represents almost four in ten retailers.

Since 2016, the proportion of EU27_2019 retailers that agree with this statement has not changed. The country trend analysis shows the largest increase in agreement is amongst retailers in Italy (+13.2 pp), and the largest decrease amongst those in Malta (-11.8 pp).

Q8.3 Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each of the following statements. In (OUR COUNTRY):

The self-regulatory bodies actively monitor respect of codes of conduct or codes of practice in your sector (% - TOTAL 'AGREE')

	2018	2018-2016	2016-2014	2014-2012	2012-2011	2011-2010	2010-2009
EU27_2019 	56.1	▼ 1.1	▲ 1.4	▼ 4.9	▲ 6.2	▲ 2.7	▼ 8.7
EU28 	59.0	▼ 1.1	▲ 1.2	▼ 4.6	▲ 5.9	▲ 3.4	▼ 9.3
REGION NORTH	62.1	▲ 2.0	▲ 4.2	▲ 0.2	▲ 9.9	▲ 4.7	▼ 12.0
REGION SOUTH	63.8	▲ 6.0	▲ 5.8	▼ 9.4	▲ 1.7	▲ 1.1	▼ 8.5
REGION EAST	54.3	▲ 5.1	▲ 1.0	▼ 7.0	▲ 1.6	▲ 9.4	▼ 6.0
REGION WEST	52.3	▼ 6.9	▼ 1.1	▼ 2.5	▲ 9.5	▲ 1.5	▼ 9.0
BE 	67.2	▼ 4.8	▲ 2.8	▲ 0.2	▲ 6.5	▲ 20.9	▼ 25.6
BG 	44.8	▼ 0.1	▼ 0.2	▼ 9.5	▲ 4.8	▼ 5.3	▲ 27.5
CZ 	39.5	▲ 5.7	▲ 2.4	▼ 6.3	▲ 1.2	▼ 1.4	▼ 18.9
DK 	64.4	▲ 6.0	▲ 3.2	▼ 2.4	▲ 13.9	▼ 2.8	▼ 15.4
DE 	41.1	▼ 8.6	▼ 1.6	▼ 5.4	▲ 12.6	▼ 1.0	▼ 6.8
EE 	40.0	▼ 4.0	▼ 6.7	▲ 19.8	▲ 17.8	▼ 23.3	▲ 2.2
IE 	77.2	▼ 3.5	▲ 7.0	▼ 5.7	▲ 11.8	▼ 8.8	▼ 5.0
EL 	54.5	▲ 8.3	▼ 2.6	▲ 2.7	▲ 4.3	▲ 6.2	▼ 15.7
ES 	54.4	▼ 1.5	▲ 6.7	▼ 15.5	▲ 5.0	▲ 2.1	▼ 4.3
FR 	74.7	▼ 1.1	▲ 3.4	▲ 4.9	▲ 2.3	▲ 4.2	▼ 8.3
HR 	52.5	▲ 5.8	▼ 4.6	▼ 3.2	N.A	N.A	N.A
IT 	73.8	▲ 13.2	▲ 6.0	▼ 5.3	▼ 1.5	▼ 3.4	▼ 8.1
CY 	55.3	▲ 2.1	▼ 5.3	▲ 3.7	▲ 15.3	▲ 1.8	▼ 18.8
LV 	42.6	▲ 1.6	▼ 6.9	▲ 6.0	▲ 5.4	▲ 9.5	▼ 16.1
LT 	56.7	▲ 0.1	▲ 9.6	▼ 3.8	▲ 0.7	▲ 13.5	▲ 2.8
LU 	79.0	▲ 6.2	▲ 12.6	▼ 16.4	▲ 17.6	▲ 20.6	▼ 41.4
HU 	69.2	▲ 10.6	▼ 1.0	▲ 6.0	▲ 7.6	▲ 13.7	▼ 11.4
MT 	58.8	▼ 11.8	▲ 4.6	▲ 0.7	▲ 18.4	▲ 24.1	▼ 47.0
NL 	68.2	▼ 2.7	▲ 2.9	▼ 0.4	▲ 5.0	▲ 13.0	▼ 19.0
AT 	61.4	▲ 6.6	▲ 1.9	▼ 8.3	▲ 16.7	▼ 4.1	▼ 1.0
PL 	48.1	▲ 3.5	▲ 9.1	▼ 19.5	▲ 1.0	▲ 4.3	▲ 6.8
PT 	64.3	▼ 0.5	▲ 9.2	▼ 16.1	▼ 3.0	▲ 11.7	▼ 21.7
RO 	71.1	▲ 2.5	▼ 4.5	▼ 2.0	▼ 2.4	▲ 27.4	▼ 16.1
SI 	54.5	▲ 2.6	▲ 6.2	▼ 4.9	▲ 14.4	▼ 13.8	▼ 14.7
SK 	41.0	▼ 1.4	▲ 1.1	▼ 3.6	▼ 4.0	▲ 13.3	▼ 25.2
FI 	75.4	▼ 4.4	▲ 6.3	▼ 4.5	▲ 6.0	▼ 0.9	▲ 8.9
SE 	65.8	▲ 1.4	▲ 5.6	▲ 2.1	▲ 11.5	▲ 12.1	▼ 25.7
IS 	39.6	▼ 1.1	▲ 1.9	▲ 6.5	▼ 5.7	▼ 4.5	▼ 7.5
NO 	78.7	▲ 3.3	▼ 8.5	▲ 5.1	▲ 3.2	▼ 0.1	▼ 7.3
UK 	77.1	▼ 0.1	▼ 3.6	▼ 3.3	▲ 4.5	▲ 12.6	▼ 13.1

 Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

































In 18 countries, at least half of all retailers agree **consumer NGOs actively monitor compliance with consumer legislation** in their sector, with those in France (79.3%), Finland (76.8%) and Luxembourg (75.9%) the most likely to do so. At the other end of the scale, 35.8% of companies in Estonia, 41.9% in Croatia and 42.2% in Greece say the same – although this is still more than one third of all retailers.





The proportion of EU27_2019 retailers that agree consumer NGOs actively monitor compliance with consumer legislation in their sector has not changed. At a country level, retailers in Denmark (+11.1 pp) are now more likely to agree than they were in 2016. On the other hand, retailers in Malta are now much less likely to agree (-18.4 pp) - a reversal of the trend from the last wave.

Q8.2 Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each of the following statements. In (OUR COUNTRY):

Consumer NGOs actively monitor compliance with consumer legislation in your sector

(% - TOTAL 'AGREE')

	2018	2018-2016	2016-2014	2014-2012	2012-2011	2011-2010	2010-2009
EU27_2019 	57.8	▲ 1.0	▼ 2.2	▼ 0.4	▲ 7.8	▲ 1.5	▼ 10.9
EU28 	59.5	▲ 1.3	▼ 2.4	▼ 1.5	▲ 7.9	▲ 2.7	▼ 11.2
REGION NORTH	59.6	▲ 1.4	▲ 0.6	▲ 1.4	▲ 10.0	▲ 7.7	▼ 16.3
REGION SOUTH	57.6	▼ 0.5	▼ 1.4	▼ 1.0	▲ 8.1	▼ 2.7	▼ 12.5
REGION EAST	50.9	▲ 2.6	▼ 1.5	▼ 3.7	▲ 3.4	▲ 6.5	▼ 4.8
REGION WEST	59.7	▲ 1.0	▼ 3.1	▲ 0.6	▲ 9.0	▲ 1.2	▼ 10.8
BE 	68.9	▼ 1.6	▲ 0.9	▲ 3.8	▲ 6.0	▲ 24.4	▼ 34.2
BG 	42.7	▲ 1.7	▼ 3.7	▼ 4.1	▲ 7.5	▼ 7.2	▲ 21.4
CZ 	44.6	▲ 2.8	▼ 2.7	▼ 3.3	▲ 3.8	▼ 0.3	▼ 13.4
DK 	61.3	▲ 11.1	▼ 7.9	▼ 1.9	▲ 13.8	▲ 11.7	▼ 33.3
DE 	52.6	▲ 2.1	▼ 2.3	▼ 1.0	▲ 9.2	▲ 2.2	▼ 10.6
EE 	35.8	▼ 5.2	▼ 1.2	▼ 1.5	▲ 20.0	▼ 20.3	▼ 2.1
IE 	72.2	▼ 0.7	▼ 0.4	▼ 1.4	▲ 12.6	▼ 14.0	▼ 4.2
EL 	42.2	▼ 0.5	▼ 4.6	▼ 1.9	▲ 1.0	▲ 0.3	▼ 15.1
ES 	49.1	▼ 4.5	▼ 4.8	▼ 6.9	▲ 10.4	▼ 1.5	▼ 7.5
FR 	79.3	▲ 0.3	▲ 1.8	▲ 10.1	▲ 10.2	▼ 7.4	▼ 3.9
HR 	41.9	▲ 0.3	▼ 5.9	▲ 1.0	N.A	N.A	N.A
IT 	67.9	▲ 3.4	▼ 0.5	▲ 7.4	▲ 6.1	▼ 7.0	▼ 15.1
CY 	54.0	▼ 2.3	▼ 2.9	▲ 0.1	▲ 22.4	▼ 3.7	▼ 14.7
LV 	46.0	▼ 0.3	▼ 6.8	▲ 10.6	▲ 5.3	▲ 9.5	▼ 14.0
LT 	70.9	▲ 4.3	▲ 8.2	=	▲ 6.1	▲ 8.0	▼ 1.0
LU 	75.9	▲ 0.1	▲ 7.8	▲ 1.2	▲ 18.7	▲ 3.3	▼ 21.6
HU 	71.5	▲ 10.7	▼ 8.4	▲ 11.4	▲ 2.8	▲ 17.5	▼ 10.7
MT 	55.8	▼ 18.4	▲ 26.6	▼ 7.1	▲ 16.0	▲ 22.8	▼ 53.1
NL 	63.5	▲ 3.1	▼ 1.8	▼ 13.6	▼ 0.1	▲ 24.9	▼ 22.7
AT 	59.4	▲ 5.2	▲ 0.8	▼ 7.8	▲ 12.3	▲ 1.3	▼ 11.1
PL 	49.8	▲ 1.5	▲ 7.8	▼ 13.2	▲ 6.1	▼ 3.8	▲ 8.1
PT 	58.7	▼ 5.9	▲ 4.5	▼ 12.8	▲ 9.6	▲ 9.8	▼ 21.2
RO 	50.8	▼ 0.6	▼ 5.2	▼ 3.6	▲ 0.2	▲ 22.9	▼ 14.3
SI 	58.3	▲ 4.4	▲ 3.3	▼ 8.4	▲ 20.4	▼ 14.0	▼ 15.5
SK 	46.1	▼ 4.8	▼ 1.4	▲ 1.4	▼ 4.7	▲ 14.5	▼ 24.5
FI 	76.8	▼ 2.3	▲ 0.7	▲ 1.5	▲ 5.3	▲ 1.2	▲ 0.5
SE 	53.6	▼ 3.8	▲ 7.9	▲ 3.6	▲ 9.3	▲ 8.6	▼ 18.5
IS 	48.3	▼ 6.7	▲ 6.1	▼ 5.1	▲ 11.4	▼ 12.9	▲ 2.8
NO 	57.4	▲ 3.9	▼ 8.9	▲ 13.7	▼ 3.0	▲ 0.5	▼ 12.6
UK 	70.4	▲ 3.9	▼ 5.1	▼ 8.8	▲ 8.2	▲ 13.4	▼ 12.7

 Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

In 11 countries, the majority of companies agree **the media regularly report on businesses which do not respect consumer legislation in their sector**. Within EU27_2019 it is companies in Hungary (63.0%), Denmark (61.1%), France and Romania (both 60.5%) that are the most likely to agree, although those in Norway outside EU27_2019 are even more likely to do so (67.5%). At the other end of the scale 31.2% in Croatia, 32.6% in Poland and 32.7% in Slovenia also agree.

Since 2016, the proportion of EU27_2019 retailers that agree with this statement has decreased (-1.9 pp). At an EU country level, the largest increase is seen amongst retailers in Hungary (+11.6 pp), and the largest decrease amongst those in Lithuania (-9.9 pp).

Q8.4 Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each of the following statements. In (OUR COUNTRY):

The media regularly report on businesses which do not respect consumer legislation in your sector (% - TOTAL 'AGREE')

	2018	2018-2016	2016-2014	2014-2012	2012-2011	2011-2010	2010-2009
EU27_2019	47.5	▼ 1.9	▲ 0.3	▲ 0.4	▼ 4.8	▼ 1.2	▼ 6.7
EU28	48.8	▼ 1.4	▼ 0.4	▼ 1.1	▼ 4.5	▼ 1.3	▼ 6.6
REGION NORTH	49.1	▼ 1.3	▲ 1.1	▼ 6.0	▼ 3.6	▲ 5.0	▼ 11.1
REGION SOUTH	47.5	▲ 3.3	▲ 4.7	▲ 0.9	▼ 2.3	▼ 7.0	▼ 5.1
REGION EAST	44.8	▲ 3.4	▼ 3.2	▼ 2.2	▼ 7.4	▲ 2.8	▼ 2.3
REGION WEST	48.1	▼ 6.3	▼ 1.7	▲ 2.1	▼ 5.6	▼ 0.4	▼ 8.3
BE	54.5	▼ 2.3	▲ 7.2	▲ 2.2	▼ 17.4	▲ 16.5	▼ 7.7
BG	41.4	▲ 10.5	▼ 10.6	▼ 11.4	▼ 8.4	▲ 1.2	▼ 5.3
CZ	39.0	▲ 3.3	▼ 2.6	▼ 11.0	▼ 0.9	▲ 2.4	▼ 5.5
DK	61.1	▲ 9.2	▼ 7.6	▼ 9.4	▼ 7.7	▲ 0.2	▼ 7.9
DE	43.2	▼ 7.9	▼ 4.0	▲ 4.3	▼ 6.8	▼ 0.7	▼ 10.2
EE	34.3	▼ 1.0	▼ 0.3	▲ 0.5	▲ 4.0	▼ 8.5	▼ 16.1
IE	59.3	▼ 1.9	▼ 1.0	▼ 4.5	▼ 3.3	▼ 9.1	▲ 0.4
EL	54.2	▼ 1.1	▲ 1.3	▲ 8.5	▼ 8.0	▼ 5.3	▼ 9.0
ES	33.3	▼ 1.2	▲ 1.6	▼ 2.0	▲ 1.8	▼ 13.2	▲ 2.0
FR	60.5	▼ 6.1	▲ 4.9	▼ 1.7	▲ 3.7	▼ 6.4	▼ 3.1
HR	31.2	▼ 4.0	▲ 5.6	▼ 0.9	N.A	N.A	N.A
IT	58.5	▲ 6.7	▲ 6.5	▲ 4.7	▼ 6.1	▼ 3.7	▼ 8.3
CY	43.3	▲ 0.2	▼ 2.7	▲ 3.3	▼ 6.6	=	▼ 11.8
LV	35.4	▲ 0.2	▼ 3.3	▼ 2.8	▼ 6.2	▲ 3.5	▼ 13.5
LT	43.3	▼ 9.9	▲ 14.9	▼ 6.5	▼ 4.8	▲ 7.8	▼ 3.4
LU	33.0	▼ 9.8	▲ 3.0	▼ 10.2	▲ 18.9	▼ 14.5	▲ 4.3
HU	63.0	▲ 11.6	▼ 8.6	▼ 7.8	▲ 7.4	▼ 3.9	▼ 6.3
MT	41.1	▼ 9.6	▲ 12.1	▼ 1.0	▲ 2.8	▼ 13.9	▼ 4.7
NL	53.5	▼ 0.6	▲ 2.6	▲ 2.2	▼ 14.9	▲ 13.0	▼ 16.9
AT	48.0	▲ 4.2	▼ 1.2	▲ 4.0	▼ 15.8	▲ 2.0	▼ 10.7
PL	32.6	▲ 3.4	▲ 1.1	▲ 3.0	▼ 15.9	▼ 10.2	▲ 11.8
PT	42.7	▼ 5.6	▲ 7.3	▼ 10.7	▲ 1.9	▲ 0.1	▼ 20.1
RO	60.5	▼ 8.1	▼ 1.0	▲ 5.0	▼ 5.6	▲ 22.7	▼ 5.2
SI	32.7	▼ 1.4	▲ 1.7	▲ 1.1	▼ 4.5	▼ 13.5	▼ 17.0
SK	36.0	▼ 6.3	▼ 0.6	▲ 1.2	▼ 11.2	▲ 7.4	▼ 16.4
FI	42.8	▲ 0.6	▼ 3.2	▲ 5.6	▼ 17.6	▼ 0.3	▲ 2.6
SE	54.1	▼ 5.5	▲ 6.2	▼ 9.6	▲ 8.8	▲ 7.5	▼ 21.1
IS	42.7	▼ 12.9	▲ 17.1	▼ 21.1	▲ 8.1	▼ 7.2	▼ 3.5
NO	67.5	▲ 3.7	▼ 7.0	▲ 5.3	▼ 5.1	▼ 0.4	▼ 3.5
UK	56.5	▲ 1.8	▼ 6.9	▼ 11.6	▼ 2.0	▲ 1.9	▼ 6.5

- Results statistically significantly higher than EU results (T-test at 95% level)
- Results statistically significantly lower than EU results (T-test at 95% level)
- Statistically significant increase from one year to the other (T-test at 95% level)
- Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

Higher proportions of retailers who agree **public authorities actively monitor and ensure compliance with consumer legislation** are:

- o retailers belonging to sector K (76.2%), while retailers belonging to sector J (55.4%), sector S (58.5%) or sector H (60.3%) are less likely to agree;
- o medium (69.3%) or large-sized retailers (76.3%);
- o companies selling food products (69.5%) or non-food products (68.2%).

Likelihood to agree **consumer NGOs actively monitor compliance with consumer legislation in their sector** is higher amongst:

- o companies from the trade sector (NACE G) (60.8%), or in services sectors K (77.1%) or L (65.2%). Companies in sector J (52.6%) or S (40.3%) are less likely to agree;
- o medium (64.4%) or large retailers (71.4%);
- o those established before 1990 (61.4%);
- o companies selling food products (60.4%) or non-food products (62.5%).

Higher proportions of companies that agree **self-regulatory bodies actively monitor respect of codes of conduct or codes of practice** are found in the following groups:

- o retailers belonging to the trade sector (50.8%), or sector K (77.8%). Lower proportions agree amongst retailers in sector H (50.0%), sector S (45.8%) and sector N (47.2%);
- o medium (61.7%), or large (63.7%) companies;
- o companies selling food products: 60.0%.

Likelihood to agree **public authorities actively monitor and ensure compliance with product safety legislation** in their sector is higher amongst:

- o companies belonging to sector I (83.2%), sector K (83.3%) or sector L (82.1%), and lower amongst companies in sector J (54.8%);
- o medium (84.4%) or large-sized (85.2%) companies;
- o companies established between 1990 and 1999: 77.8%;
- o companies selling food products: 82.1%.

The proportion of companies that agree **the media regularly report on businesses which do not respect consumer legislation** in their sector is higher amongst:

- o companies belonging to sector K (56.3%), sector L (53.5%) or sector I (49.8%), and lower amongst retailers in sector H (39.7%) and sector S (33.9%);
- o companies selling food products: 52.4%.

b) Additional measures from public authorities to insure product safety

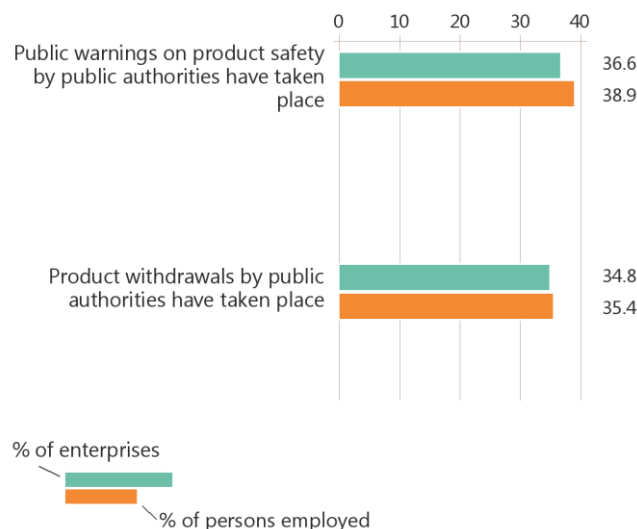
Retailers that sell non-food products were also asked whether any product warnings or product withdrawals had taken place in their sector last 24 months.

- Less than four in ten companies say that product withdrawals by public authorities have taken place -

More than one third of companies (36.6%) in EU27_2019 say that **product withdrawals by public authorities have taken place** – this represents 38.9% of the total number of people employed.

More than one third of retailers (34.8%) in EU27_2019 say **public warnings on product safety by public authorities have taken place in their sector in the last 24 months**. This represents 35.4% of the number of persons employed at the companies surveyed.

E6_rE7_r With regard to product safety, please tell me whether any of the following has taken place in your sector in the last 24 months:
(% - EU27_2019)



Base: Retailers in EU27_2019 selling non-food products (N=4061)

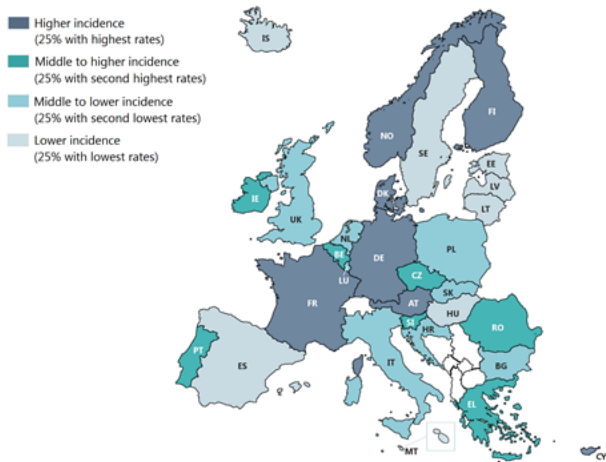
Retailers in the eastern and southern regions (both 29.0%) are less likely to say **product withdrawals** by public authorities have taken place in the last 24 months in their country, while those in the western region are more likely to say this (38.3%), compared to EU27_2019. There is no difference between EU27_2019 and companies in the northern region

Retailers in the northern (30.8%) and eastern (26.1%) regions are less likely to say **public warnings on product safety** by public authorities have taken place in the last 24 months in their country, compared to EU27_2019. Retailers in the western region are more likely to say these have taken place (40.3%). There is no difference between EU27_2019 and companies in the southern region.

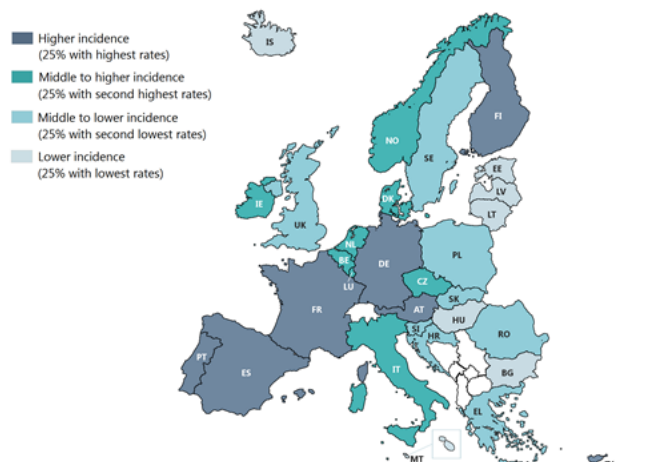
Companies in Finland (49.6%), Austria (44.8%) and France (44.4%) are the most likely to say that **product withdrawals** by public authorities have taken place, while those in Lithuania (11.7%), Estonia (14.5%) and Malta (15.7%) are the least likely to say so¹⁵.

Companies in Finland (48.7%), Austria (46.3%) and Germany (41.2%) are the most likely to say **public warnings on product safety have occurred**, while those in Estonia (14.0%), Malta (17.8%) and Lithuania (18.8%) are the least likely to say this.

E6_r With regard to product safety, please tell me whether any of the following has taken place in your sector in the last 24 months:
(% - PRODUCT WITHDRAWALS BY PUBLIC AUTHORITIES HAVE TAKEN PLACE)



E7_r With regard to product safety, please tell me whether any of the following has taken place in your sector in the last 24 months:
(% - PUBLIC WARNINGS ON PRODUCT SAFETY BY PUBLIC AUTHORITIES HAVE TAKEN PLACE)



Base: All retailers selling non-food products (N=4542)

Since 2016, the proportion of retailers that say **product withdrawals** by public authorities have taken place has not changed. The proportion of EU27_2019 retailers saying **public warnings on product safety have occurred** has, however, increased (+2.6 pp).

The country trend analysis shows companies in Ireland are now much less likely to say **product withdrawals by public authorities have occurred** (-15.7 pp), while those in Greece are more likely to do so (+10.4 pp) Companies in Finland are now more likely to say **public warnings on product safety have occurred** (+9.4 pp).

¹⁵ Due to low sample size, results for Cyprus (n=50), Luxembourg (n=55) and Malta (n=57) should be interpreted with caution.

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E6_rE7_r With regard to product safety, please tell me whether any of the following has taken place in your sector in the last 24 months:
(%)

	Product withdrawals by public authorities have taken place			Public warnings on product safety by public authorities have taken place		
	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014
EU27_2019	34.8	▼ 1.8	▲ 2.0	36.6	▲ 2.6	▼ 0.4
EU28	33.8	▼ 2.3	▲ 1.9	35.4	▲ 1.2	▲ 1.0
REGION NORTH	30.6	▲ 3.3	▲ 4.7	30.8	▲ 2.1	▲ 4.8
REGION SOUTH	29.0	▼ 4.0	▲ 4.0	34.7	▲ 1.1	▲ 2.0
REGION EAST	29.0	▲ 2.9	▼ 1.9	26.1	▼ 0.3	▼ 3.1
REGION WEST	38.3	▼ 3.8	▲ 0.6	40.3	▲ 3.3	▼ 1.8
BE	33.1	▲ 1.5	▲ 3.1	36.0	▲ 8.0	▼ 3.8
BG	27.0	▲ 7.4	▼ 11.2	22.1	▲ 2.9	▼ 13.0
CZ	31.9	▼ 0.7	▲ 9.1	31.8	▼ 1.8	▲ 5.4
DK	41.5	▲ 5.7	▲ 13.2	37.4	▼ 1.4	▲ 13.6
DE	37.3	▼ 5.8	▲ 1.2	41.2	▲ 2.3	▼ 4.9
EE	14.5	▲ 2.1	▼ 2.3	14.0	▲ 5.6	▼ 4.9
IE	34.0	▼ 15.7	▲ 0.7	36.4	▼ 5.5	▲ 2.1
EL	33.3	▲ 10.4	▼ 3.3	28.8	▲ 6.0	▼ 6.0
ES	24.9	▼ 4.9	▲ 2.4	38.3	▲ 6.8	▼ 0.3
FR	44.4	▼ 4.3	▲ 4.1	40.1	▲ 0.9	▲ 6.6
HR	25.6	▲ 5.2	▼ 3.8	24.8	▲ 4.6	▼ 7.3
IT	30.0	▼ 8.1	▲ 4.6	32.2	▼ 3.6	▲ 2.4
CY	38.1	▼ 6.5	▲ 21.6	52.8	▲ 15.7	▲ 9.3
LV	21.2	▼ 4.2	▲ 7.7	22.2	▲ 2.2	▼ 3.0
LT	11.7	▼ 1.1	▲ 2.2	18.8	▲ 2.4	▲ 2.7
LU	30.4	▲ 1.9	▲ 2.0	34.4	▲ 9.4	▼ 1.3
HU	20.6	▼ 1.3	▼ 3.7	22.1	=	▼ 1.9
MT	15.7	▼ 0.9	▼ 26.1	17.8	▼ 2.6	▼ 18.5
NL	30.4	▲ 2.6	▼ 7.1	30.2	▲ 7.2	▼ 13.6
AT	44.8	▲ 5.9	▲ 2.5	46.3	▲ 3.0	▲ 7.2
PL	30.3	▲ 2.1	▼ 2.0	24.8	▲ 0.5	▼ 1.3
PT	31.9	▼ 1.1	▲ 9.4	39.1	▼ 4.0	▲ 14.1
RO	31.7	▲ 6.5	▼ 3.1	28.3	▼ 3.5	▼ 5.2
SI	32.3	▼ 0.6	▲ 4.6	27.2	▼ 3.9	▲ 8.9
SK	26.6	▲ 2.8	▼ 7.0	27.0	▲ 4.8	▼ 8.1
FI	49.6	▲ 7.6	▲ 4.5	48.7	▲ 9.4	▲ 1.9
SE	23.7	▼ 0.3	▼ 6.5	24.8	▼ 4.3	▼ 0.3
IS	24.0	▼ 7.3	▲ 11.9	15.8	▼ 3.6	▲ 0.9
NO	41.7	▲ 4.7	=	31.7	▲ 6.7	▼ 2.1
UK	27.6	▼ 5.7	▲ 1.5	28.3	▼ 7.0	▲ 8.2

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers selling non-food products (N=4542)

The analysis of company characteristics shows that for both **product withdrawals** and **public warnings on product safety** the following groups are more likely to say they have taken place in their sector: trade companies, those established in 2000 or later, those that also sell food products, and companies where the respondent is a general manager. For example, 40.9% of companies in the trade sector say product withdrawals have taken place, compared to 21.9% in the services sector.

3. Complaints and Dispute Resolution

This chapter begins with an overview of retailers’ knowledge about alternative dispute resolution mechanisms. Retailers’ experiences of customer complaints will then be discussed, including the types of complaints received, and the means consumers use to make complaints.

3.1 Alternative dispute resolution (ADR) mechanisms

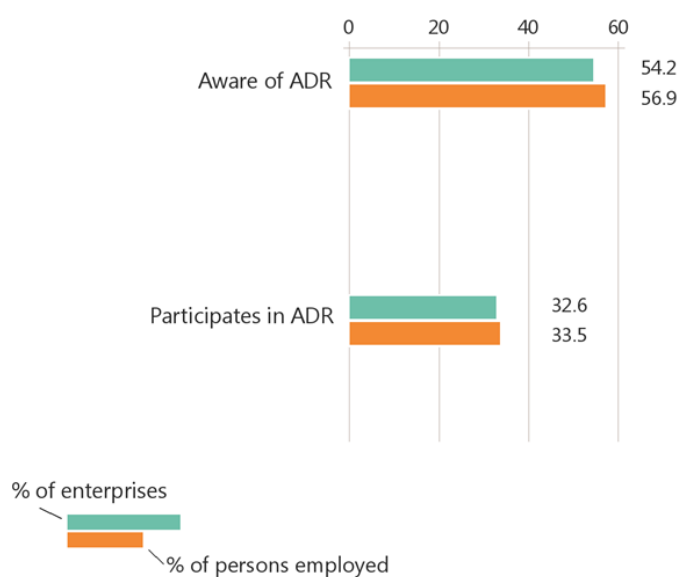
Retailers were asked about their awareness and use of Alternative Dispute Resolution bodies (ADR) for settling disputes with consumers in their own country.

- Just over half of all retailers are aware of ADR, although less than a third participates in ADR -

When asked, a slight majority of all companies in EU27_2019 (54.2%) say they **are aware of ADR bodies**, while three in ten (32.6%) **participates in ADR mechanisms**. This represents 56.9% and 33.5% respectively of the total persons employed.

In detail, slightly less than a third (32.6%) **are willing or mandated by law to use ADR in connection with consumer complaints**, 13.1% **are aware of such procedures but say they do not exist in their sector**, while 8.5% explicitly say they are **unwilling to use them**.

T1_rpc5_r Awareness and participation in ADR mechanisms (% - EU27_2019)

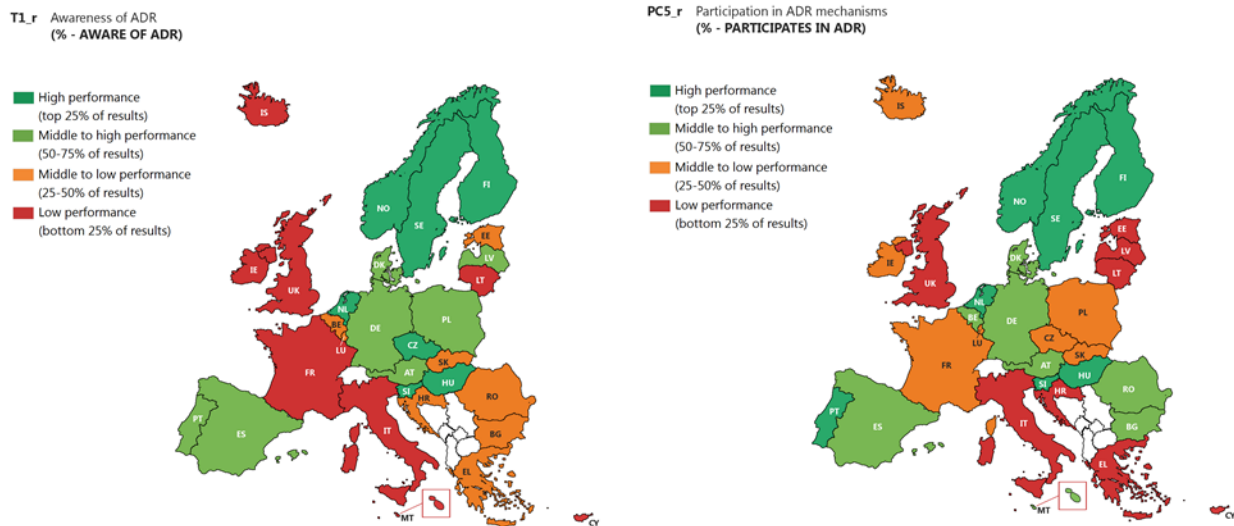


Base: All retailers in EU27_2019 (N=9796)

Retailers in the northern (59.6%), eastern (58.1%) and western regions (56.7%) are more likely to be **aware of ADR**, and those in the north (43.7%) and west (34.0%) are also more likely to **participate in ADR mechanisms**, compared to EU27_2019. Retailers in the southern region, on the other hand, are less likely to be aware of, or to participate in ADR mechanisms compared to EU27_2019 as a whole

In 17 countries, at least half of all retailers say they are **aware of ADR**, with the highest awareness amongst those in Finland (70.8%), Hungary (70.6%) and the Czech Republic (69.5%). At the other end of the scale 29.8% in Italy, 33.0% in Cyprus and 34.1% in Lithuania within EU27_2019, as well as 33.1% in Iceland are aware of ADR bodies.

There are only three Member States where at least half of all retailers **participate in ADR mechanisms**: Sweden (68.5%), Hungary (57.5%) and Finland (52.2%). At the other end of the scale, companies in Lithuania (7.4%), Latvia (15.8%) and Croatia (16.3%) are the least likely to participate.



Base: All retailers (N=10747)

It is interesting to note that awareness and use of ADR bodies are not always positively related. For example, in Sweden (both 68.5%)¹⁶, Finland (70.8% and 52.2%), Hungary (70.6% and 57.7%) and the Netherlands (64.2% and 43.5%) there is both high awareness and relatively high use of ADR bodies. Outside of EU27_2019 the same pattern applies in Norway.

Meanwhile in Italy, awareness of ADR bodies is relatively low (29.8%), but the proportion who participate in ADR only slightly lower (21.1%), and a similar pattern applies in Malta, Cyprus, Portugal and Hungary. Outside EU27_2019, this pattern is also observed in Iceland (33.1% and 27.3% respectively).

¹⁶ Please note that in Sweden, this question was formulated in a specific way, which makes results not fully comparable to the other country results.

On the other hand, some countries have high levels of awareness of ADR bodies, but low participation. This is the case in Estonia, where 45.1% **are aware** but only 17.1% **have used ADR mechanisms**. The same applies in Croatia, Poland, Slovakia and Luxembourg.

Retailers in EU27_2019 are more likely to participate in ADR (+1.5 pp) than they were in 2018

Across EU27_2019, the largest increase in the proportion of companies **aware of ADR** is observed amongst retailers in Denmark (+7.1 pp), and the largest decrease amongst those in Malta (+30.4 pp).

Retailers in Romania recorded the highest increase in **participation in ADR** mechanisms in EU27_2019 (+9.8 pp). The largest decline in participation is seen amongst companies in Malta (-33.7 pp).

T1_rpc5_r Awareness and participation in ADR mechanisms (%)

	Aware of ADR			Participates in ADR		
	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014
EU27_2019	54.2	▼ 1.2	▲ 0.5	32.6	▲ 1.5	▲ 0.5
EU28	51.4	▼ 3.8	▲ 1.0	30.4	▼ 1.4	▲ 1.7
REGION NORTH	59.6	▲ 1.3	▲ 0.8	43.7	▲ 3.2	▲ 1.5
REGION SOUTH	44.5	▼ 9.5	▼ 1.8	27.7	▼ 4.8	▲ 1.5
REGION EAST	58.1	▼ 0.6	▲ 1.4	30.4	▲ 3.6	▼ 0.4
REGION WEST	56.7	▲ 2.1	▲ 1.2	34.0	▲ 3.3	▲ 0.6
BE	55.1	▲ 3.8	▼ 0.8	34.0	▲ 8.9	▼ 5.3
BG	50.6	▼ 0.4	▼ 0.6	28.7	▲ 7.2	▼ 5.1
CZ	69.5	▲ 5.6	▲ 2.1	24.7	▲ 3.2	▲ 1.1
DK	56.3	▲ 7.1	▼ 3.0	40.8	▲ 8.5	▼ 2.9
DE	61.5	▲ 7.0	▼ 4.3	37.0	▲ 6.1	▼ 0.9
EE	45.1	▼ 9.9	▲ 0.9	17.1	▼ 7.4	▼ 7.1
IE	38.7	▼ 21.9	▲ 12.0	23.9	▼ 14.6	▲ 7.3
EL	44.1	▼ 4.2	▼ 16.0	21.0	▼ 0.8	▼ 4.1
ES	59.4	▼ 8.1	▼ 1.1	33.5	▼ 5.8	▼ 1.9
FR	40.6	▼ 5.2	▲ 7.3	21.5	▲ 0.9	▲ 2.1
HR	48.5	▼ 11.1	▼ 5.2	16.3	▼ 8.0	▼ 0.3
IT	29.8	▼ 7.7	▼ 1.5	21.1	▼ 0.5	▲ 2.0
CY	33.0	▲ 2.4	▼ 0.2	20.6	▲ 3.5	▲ 0.8
LV	60.2	▼ 1.5	▼ 1.1	15.8	▼ 0.4	▲ 2.4
LT	34.1	▼ 5.0	▼ 1.3	7.4	▼ 4.9	▼ 3.4
LU	50.6	▼ 0.9	▼ 6.2	23.2	▼ 6.1	▼ 0.7
HU	70.6	▲ 1.6	▲ 3.9	57.5	▲ 7.5	▲ 5.3
MT	41.1	▼ 30.4	▲ 6.3	28.6	▼ 33.7	▲ 8.8
NL	64.2	▼ 4.9	▲ 1.3	43.5	▲ 1.0	▼ 2.8
AT	57.5	▲ 2.8	▲ 2.5	35.2	▼ 3.2	▼ 3.8
PL	58.3	▼ 6.4	▲ 1.7	23.1	▼ 2.9	▲ 3.0
PT	58.6	▼ 4.2	▲ 15.9	45.3	▼ 6.9	▲ 21.6
RO	49.1	▲ 4.8	▲ 0.1	31.1	▲ 9.8	▼ 6.3
SI	67.5	▲ 2.6	▲ 10.9	43.3	▼ 3.9	▲ 16.1
SK	55.0	▲ 1.4	▼ 0.7	21.6	▲ 1.8	▼ 4.4
FI	70.8	▲ 3.1	▲ 3.9	52.2	▲ 7.3	▲ 1.4
SE	68.5	▲ 1.3	▼ 1.9	68.5	▲ 1.3	▼ 1.9
IS	33.1	▲ 4.4	▼ 19.0	27.3	▲ 0.4	▼ 8.1
NO	62.1	▲ 11.0	▼ 9.5	50.3	▲ 10.2	▼ 6.5
UK	34.2	▼ 19.8	▲ 4.3	16.8	▼ 18.7	▲ 9.3

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

The analysis of company characteristics shows a number of commonalities in the retailers more likely to both be **aware of ADR** and **participate in ADR mechanisms**:

- o companies in sector K, sector L or sector N;
- o large companies;
- o companies established prior to 1990;
- o companies selling non-food products;
- o companies engaged in distance sales or online sales;
- o companies that sell in four or more languages;
- o companies where the respondent is a general manager.

In addition, companies in sector I, that do not sell via distance or online are less likely to be aware of or participate in ADR mechanisms. Retailers in in sector S and those established in 2000 or later are less likely to be aware of ADR.

3.2 Consumer complaints

Retailers were asked whether they had **received complaints from consumers in their own country** and, if so, the channels used to make these complaints.

a) Incidence of complaints and channels used to receive them

- Retailers are more likely to have received complaints from domestic consumers than from consumers in another EU country -

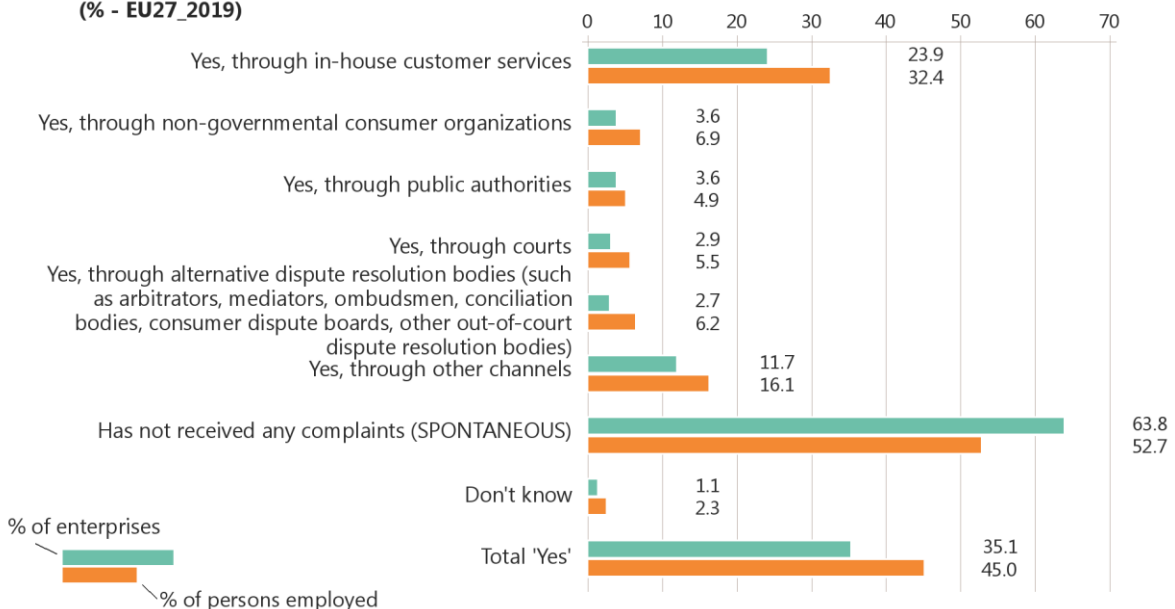
More than one third of retailers in EU27_2019 (35.1%) have received complaints from consumers in their own country in the past 12 months, representing 45.0% of the total persons employed. In contrast, only 15.5% of retailers selling cross border received complaints from consumers located in other EU countries. This is 19.6% of the total persons employed.

Looking first at complaints from consumers in the **retailer’s own country**, these are most likely to come **through in-house customer services** (23.9%). Just over one in ten mention other channels (11.7%).

Less than one in twenty retailers mention **public authorities** (3.6%), **non-governmental consumer organizations** (3.6%), **courts** (2.9%) or **alternative dispute resolution bodies** (2.7%).

However, the majority of retailers in EU27_2019 have not received any complaints in the past 12 months (63.8%).

Q14T During the past 12 months, has your company received complaints from consumers located in (OUR COUNTRY)? (MULTIPLE ANSWERS POSSIBLE) (% - EU27_2019)

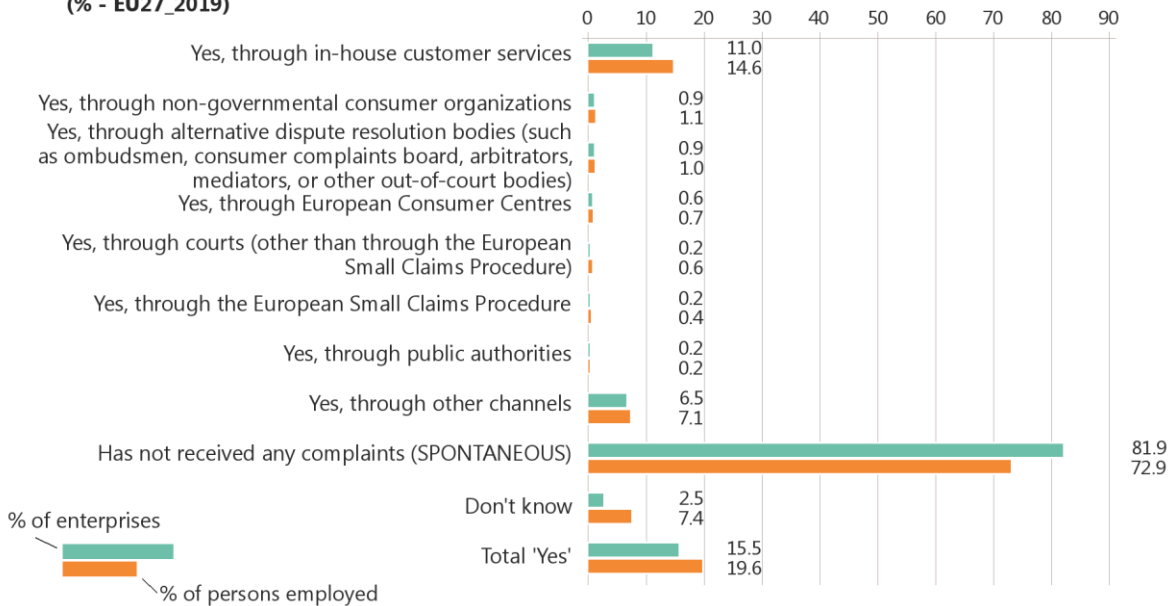


Base: All retailers in EU27_2019 (N=9796)

For retailers in EU27_2019 that sell in other EU countries, complaints from consumers in **other EU countries** are also most likely to come through in-house customer services (11.0%), while 6.5% mention other channels. Channels such as the non-governmental consumer organisations, public authorities, courts, European Consumer Centres, ADR bodies and the European Small Claims Procedure are mentioned by less than 1.0%.

However, the large majority of these retailers have not received any complaints from consumers in other EU countries in the past 12 months (81.9%).

Q15 During the past 12 months, has your company received complaints from consumers located in other EU countries?
(MULTIPLE ANSWERS POSSIBLE)
(% - EU27_2019)

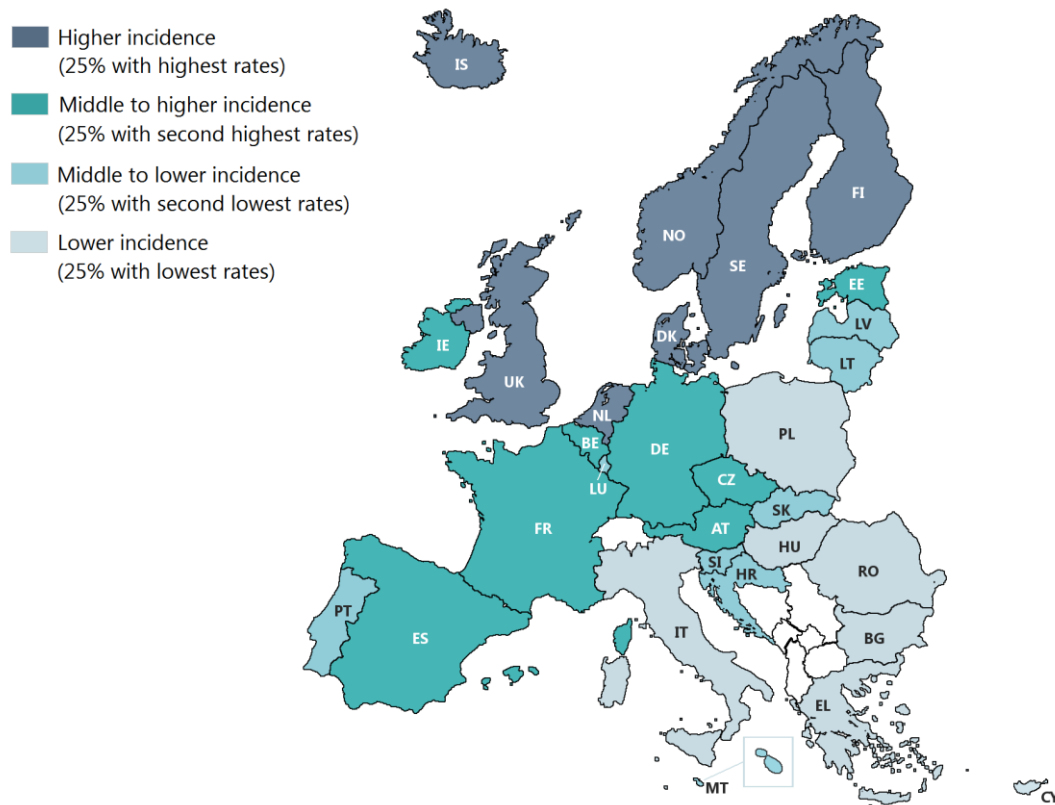


Base: All retailers in EU27_2019 selling to other EU countries (N=2921)

Complaints received from domestic consumers

Retailers in the northern (55.5%) and western (42.3%) regions are more likely to have received complaints from domestic consumers (39.8%), compared to EU27_2019. On the other hand, companies in or in eastern (23.3%) or southern (20.7%) regions are less likely to have had these complaints than those in EU27_2019 as a whole.

Q14T During the past 12 months, has your company received complaints from consumers located in (OUR COUNTRY)? (MULTIPLE ANSWERS POSSIBLE)
(% - TOTAL 'YES')



Base: All retailers (N=10747)

Within EU27_2019, there are only four countries where at least half of all retailers have received complaints from **consumers located in their country**: Finland (69.0%), Sweden (67.8%), Denmark (63.7%) and the Netherlands (52.3%), although outside EU27_2019 59.4% in Iceland and 52.5% in Norway say the same. At the opposite end of the scale, around one in ten retailers in Greece (7.6%), Italy (10.1%) and Cyprus (11.7%) have received complaints from domestic consumers.

Looking at the results in more detail, companies in Finland (63.8%), Sweden (54.2%) and Denmark (54.2%) are the most likely to have received complaints through **in-house customer services** in EU27_2019. Outside EU27_2019 more than half in Iceland say the same (54.6%). In contrast, fewer than one in twenty companies in Romania (2.2%), Cyprus (3.9%) and Greece (4.8%) have received customer complaints this way.

Retailers in France (6.7%) and Denmark (6.0%) within EU27_2019, as well as in Iceland (5.9%), are the most likely to have received complaints through **non-governmental consumer organizations**, while those in Croatia (0.0%), Cyprus (0.4%) Greece and Malta (both 0.6%) are the least likely to have done so.

Companies in Spain (10.1%), Denmark (6.2%), Cyprus (5.3%) and Sweden (5.1%) are the most likely have received complaints through **public authorities**, compared to 0.0% in Malta, 0.5% in Croatia and 0.7% in Italy.

Retailers in Ireland (6.5%) and Germany (4.8%) are the most likely to have received complaints through the **courts**, while no retailers in Malta and Luxembourg (both 0.0%) have received complaints this way.

At least one in twenty companies in Sweden (6.8%), Finland (6.0%) and Denmark (5.4%) have received complaints through **alternative dispute resolution bodies**, compared to 0.3% in Slovakia, and 0.4% in Romania and Cyprus.

Retailers in Sweden (21.1%), the Netherlands (18.6%) and Germany (16.7%) are the most likely to have received complaints through **other channels**, particularly compared to companies in Estonia (0.8%), Malta (1.9%) and Greece (2.0%).

Since 2016, there has been no significant change in the proportion of EU27_2019 retailers that have received complaints from consumers located in their country. At a country level, the largest increase is recorded in Denmark (+12.3 pp) and the largest decrease is observed amongst companies in Malta (-22.0 pp).

Since 2016, there has been an increase in the proportion of retailers in EU27_2019 receiving complaints from domestic consumers via non-government consumer organisations (+0.6 pp), through public authorities (+0.9 pp) or through other channels (+2.5 pp). The highlights from the country trend analysis (amongst the 27 Member States of the EU in 2019) are presented in the table below.

Source of complaint	Largest <u>increase</u> since 2016	Largest <u>decrease</u> since 2016
In-house customer services	Slovakia (+9.1 pp)	Ireland (-18.0 pp)
Non-governmental consumer organizations	Denmark (+3.0 pp)	-
Public authorities	Denmark (+3.9 pp)	-
Alternative dispute resolution bodies	-	-
Courts	-	Belgium (-3.3 pp)

EUROPEAN COMMISSION

Q14T During the past 12 months, has your company received complaints from consumers located in (OUR COUNTRY)? (MULTIPLE ANSWERS POSSIBLE)
(%)

		Yes, through in-house customer services			Yes, through non-governmental consumer organizations			Yes, through public authorities			Yes, through courts			Yes, through alternative dispute resolution bodies (such as arbitrators, mediators, ombudsmen, conciliation bodies, consumer dispute boards, other out-of-court dispute resolution bodies)		
		2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014
		EU27_2019	23.9	▼ 1.1	▼ 3.4	3.6	▲ 0.6	▼ 0.2	3.6	▲ 0.9	▼ 1.0	2.9	▼ 0.4	▼ 0.1	2.7	=
EU28	26.7	▼ 1.4	▼ 2.9	3.6	=	▲ 0.1	3.8	▲ 0.5	▼ 1.1	2.8	▼ 0.4	▼ 0.4	2.6	▼ 0.4	▼ 0.3	
REGION NORTH	46.0	▲ 5.5	▲ 0.8	3.6	▲ 1.8	▼ 1.2	4.5	▲ 1.3	▼ 1.4	1.9	▲ 0.7	▼ 0.7	4.6	▲ 1.4	▼ 0.5	
REGION SOUTH	13.0	▼ 2.6	▼ 4.9	1.8	▼ 0.4	▼ 1.3	4.5	▲ 1.1	▼ 2.5	1.5	▼ 0.6	▼ 0.6	2.0	▼ 0.9	▼ 0.5	
REGION EAST	11.4	▼ 2.8	▼ 0.5	1.1	=	▲ 0.3	2.5	▼ 0.1	▼ 0.3	1.2	▼ 0.5	▲ 0.4	1.4	▼ 0.4	▲ 0.6	
REGION WEST	29.5	▼ 1.0	▼ 5.2	5.2	▲ 0.9	▲ 0.2	3.5	▲ 1.1	▼ 0.2	4.3	▼ 0.4	▼ 0.1	3.1	▲ 0.2	▲ 0.3	
BE	40.4	▼ 1.6	=	5.1	▲ 0.1	▼ 2.1	3.7	▼ 0.9	▲ 1.3	2.7	▼ 3.3	▼ 0.3	3.4	▼ 2.3	▲ 1.2	
BG	8.6	▼ 6.5	▼ 4.3	1.4	▲ 0.4	▲ 0.9	2.4	▲ 0.2	▼ 0.4	1.4	▲ 1.1	▼ 0.5	1.6	▲ 1.1	▼ 0.6	
CZ	20.8	▼ 3.4	▼ 0.1	0.7	▲ 0.1	▲ 0.2	2.5	▼ 2.0	▲ 0.9	1.9	▼ 0.3	▼ 0.5	2.2	▲ 0.8	▼ 0.1	
DK	54.2	▲ 9.0	▼ 1.7	6.0	▲ 3.0	▼ 0.6	6.2	▲ 3.9	▼ 1.5	2.8	▲ 1.3	▼ 1.1	5.4	▲ 1.2	▲ 0.3	
DE	26.5	▲ 0.3	▼ 9.4	5.3	▲ 1.3	▲ 0.6	4.0	▲ 2.2	▼ 1.4	4.8	▲ 0.1	▼ 0.7	2.6	▲ 0.5	▲ 0.1	
EE	36.0	▼ 1.8	▲ 1.8	2.8	▲ 0.6	▼ 2.5	1.9	▼ 0.7	▼ 1.5	1.1	▲ 0.4	▼ 0.3	0.9	▼ 1.8	▲ 0.9	
IE	39.9	▼ 18.0	▲ 4.8	5.2	▼ 3.1	▲ 3.2	4.3	▼ 1.8	▲ 2.2	6.5	▲ 0.6	▲ 0.7	4.6	▼ 1.2	▲ 2.3	
EL	4.8	=	▼ 3.7	0.6	▼ 0.3	▼ 0.6	1.4	▼ 1.1	▲ 0.3	1.3	▲ 0.5	▼ 0.9	1.5	▼ 0.3	▼ 0.2	
ES	22.3	▲ 2.1	▼ 4.0	2.9	▼ 0.4	▼ 3.0	10.1	▲ 3.7	▼ 3.5	1.6	▼ 0.1	▼ 1.4	3.5	▼ 1.2	▼ 0.3	
FR	32.1	▲ 4.2	▼ 3.1	6.7	▲ 1.7	▲ 0.1	2.4	▼ 1.2	▲ 1.8	3.5	▼ 2.0	▲ 1.2	4.5	▲ 0.7	▲ 0.1	
HR	16.2	▲ 0.8	▲ 5.8	0.0	▼ 1.3	▲ 0.1	0.5	▼ 0.3	=	1.0	▼ 1.8	▲ 2.2	0.6	▲ 0.1	▼ 0.1	
IT	6.2	▼ 5.5	▼ 5.7	0.8	▼ 0.4	=	0.7	▲ 0.1	▼ 0.2	1.5	▼ 1.7	▲ 0.2	0.8	▼ 0.8	▼ 0.6	
CY	3.9	▼ 0.9	▼ 0.9	0.4	▲ 0.4	▼ 1.2	5.3	▲ 2.6	▲ 2.3	0.4	▼ 0.6	▲ 0.1	0.4	▼ 1.9	▲ 2.3	
LV	18.9	▲ 1.6	▲ 3.0	2.2	▲ 1.4	▼ 2.0	2.0	▼ 1.0	▼ 2.1	1.8	▲ 0.6	▼ 0.6	1.0	▲ 0.2	▼ 1.1	
LT	15.8	▼ 3.5	▲ 4.0	1.6	▲ 1.4	▼ 0.8	4.3	▲ 1.4	▼ 1.8	0.8	▲ 0.3	▼ 0.4	0.7	▲ 0.1	▲ 0.4	
LU	17.1	▼ 4.1	▼ 2.0	2.8	▼ 0.6	▲ 1.2	3.2	▲ 1.8	▼ 1.6	0.0	▼ 0.5	▼ 1.4	2.8	▲ 0.8	▲ 1.5	
HU	11.7	▼ 7.4	▼ 2.0	1.1	▲ 0.3	=	1.6	▲ 1.5	▼ 2.0	1.1	=	▲ 0.4	1.3	▲ 0.4	▼ 0.6	
MT	26.0	▼ 17.9	▼ 0.3	0.6	▲ 0.2	▼ 2.2	0.0	▼ 2.7	▲ 0.1	0.0	▼ 0.4	▼ 1.0	2.1	▼ 2.3	▼ 0.4	
NL	39.9	▼ 4.1	▼ 3.4	3.1	▲ 0.8	▼ 1.2	1.6	▲ 0.8	▼ 0.2	1.2	▼ 1.2	▲ 0.7	2.3	▼ 0.9	=	
AT	29.4	▼ 2.2	▲ 12.7	3.2	▼ 1.2	▲ 2.5	2.2	▼ 1.2	▲ 2.2	3.4	▼ 1.3	▲ 0.9	3.7	▼ 0.5	▲ 2.8	
PL	11.4	▼ 0.4	▲ 1.2	1.8	▲ 0.2	▲ 0.6	1.6	▼ 0.4	▲ 0.7	1.6	▼ 1.6	▲ 1.1	2.3	▼ 2.1	▲ 3.0	
PT	18.6	▲ 0.9	▼ 3.4	3.3	▲ 0.6	▼ 0.6	4.3	▲ 2.2	▼ 9.2	1.6	▲ 1.2	▼ 1.2	2.4	▲ 1.5	▼ 0.2	
RO	2.2	▼ 1.3	▼ 0.8	0.7	=	=	4.8	▲ 0.3	▼ 1.0	0.3	▼ 0.2	=	0.4	▲ 0.2	▼ 0.7	
SI	22.2	▼ 6.7	▼ 17.9	1.7	▲ 1.0	▼ 0.4	3.1	▲ 1.4	▲ 0.7	1.6	▲ 1.1	▼ 0.8	0.5	▲ 0.3	▼ 0.9	
SK	21.5	▲ 9.1	▼ 9.5	1.4	▼ 0.6	▲ 0.4	1.6	▼ 0.4	▼ 2.3	0.4	▼ 0.7	▲ 0.4	0.3	▼ 1.3	▲ 0.3	
FI	63.8	▼ 1.1	▼ 1.2	0.9	▼ 0.8	▼ 0.4	3.9	▼ 0.7	▼ 0.8	0.5	▼ 0.4	▼ 0.9	6.0	▲ 1.8	▼ 1.6	
SE	54.2	▲ 7.0	▲ 1.8	5.0	▲ 2.7	▼ 2.0	5.1	▲ 1.7	▼ 1.5	2.6	▲ 1.2	▼ 0.4	6.8	▲ 2.4	▼ 1.4	
IS	54.6	▲ 6.9	▲ 4.8	5.9	▲ 0.8	▲ 1.0	4.2	▼ 1.4	▲ 4.3	1.9	▼ 0.7	▲ 1.9	2.4	▲ 0.6	▲ 0.6	
NO	43.7	▲ 15.0	▼ 24.0	1.5	=	▼ 1.3	2.6	=	▼ 3.9	0.8	▲ 0.1	▼ 1.4	2.5	▲ 1.4	▼ 2.8	
UK	44.4	▼ 1.7	▼ 3.3	3.7	▼ 3.0	▲ 1.7	4.6	▼ 2.1	▼ 2.2	2.2	▼ 0.3	▼ 3.0	1.9	▼ 2.4	▼ 2.6	

Results statistically significantly higher than EU results (T-test at 95% level)
Results statistically significantly lower than EU results (T-test at 95% level)
Statistically significant increase from one year to the other (T-test at 95% level)
Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

EUROPEAN COMMISSION

Q14T During the past 12 months, has your company received complaints from consumers located in (OUR COUNTRY)?
(MULTIPLE ANSWERS POSSIBLE)
(%)

		Yes, through other channels			Has not received any complaints (SPONTANEOUS)			Don't know			Total 'Yes'		
		2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014
		EU27_2019	11.7	▲ 2.5	▲ 0.1	63.8	▲ 0.7	▲ 2.0	1.1	▼ 0.5	▲ 0.3	35.1	▼ 0.2
EU28	11.4	▲ 1.9	▼ 0.4	61.4	▲ 0.8	▲ 1.9	1.7	▼ 0.1	▲ 0.4	37.0	▼ 0.6	▼ 2.3	
REGION NORTH	12.7	▲ 4.2	▼ 2.0	43.1	▼ 5.8	=	1.4	▼ 0.5	▲ 0.5	55.5	▲ 6.2	▼ 0.5	
REGION SOUTH	4.3	▼ 1.8	▲ 0.2	78.1	▲ 4.3	▲ 6.3	1.2	▲ 0.7	▼ 1.2	20.7	▼ 5.0	▼ 5.1	
REGION EAST	9.0	▲ 0.8	▼ 1.1	74.7	▲ 1.2	▲ 1.1	2.1	▲ 0.2	▲ 0.7	23.3	▼ 1.3	▼ 1.7	
REGION WEST	15.9	▲ 5.0	▲ 0.3	56.9	=	▲ 1.3	0.7	▼ 1.2	▲ 0.8	42.3	▲ 1.1	▼ 2.2	
BE	9.5	▼ 1.1	▼ 2.1	50.2	▲ 3.1	▼ 0.3	2.2	▲ 0.5	▲ 0.7	47.6	▼ 3.6	▼ 0.4	
BG	6.5	▼ 0.8	▼ 1.1	74.6	▲ 0.8	▲ 5.7	5.3	▲ 3.9	▼ 0.3	20.1	▼ 4.7	▼ 5.4	
CZ	15.5	▲ 2.5	▲ 3.3	57.5	▼ 5.5	▼ 0.2	5.5	▲ 4.7	▼ 0.8	36.9	▲ 0.7	▲ 0.9	
DK	14.2	▲ 9.2	▼ 4.4	34.9	▼ 11.5	▲ 5.4	1.3	▼ 0.9	▼ 0.5	63.7	▲ 12.3	▼ 4.9	
DE	16.7	▲ 6.4	=	58.3	▼ 0.8	▲ 2.9	0.2	▼ 2.5	▲ 1.8	41.4	▲ 3.2	▼ 4.8	
EE	0.8	▼ 1.3	▼ 0.7	61.0	▲ 4.3	▼ 3.3	0.9	▲ 0.1	▲ 0.3	38.1	▼ 4.4	▲ 2.9	
IE	9.3	▼ 6.4	▲ 6.9	49.5	▲ 16.7	▼ 5.3	4.4	▲ 3.2	▼ 1.4	46.1	▼ 19.9	▲ 6.7	
EL	2.0	▲ 0.2	▲ 0.8	90.4	▼ 0.9	▲ 5.4	2	▲ 1.4	▲ 0.1	7.6	▼ 0.5	▼ 5.5	
ES	5.2	▲ 0.8	▼ 0.9	62.3	▼ 7.4	▲ 7.9	1.4	▲ 0.9	▼ 1.4	36.3	▲ 6.5	▼ 6.6	
FR	15.5	▲ 4.9	▲ 0.7	57.4	▼ 5.1	▲ 1.6	1	▲ 1.0	▼ 0.8	41.6	▲ 4.2	▼ 0.7	
HR	5.0	▼ 6.1	▲ 0.1	77.3	▲ 8.7	▼ 8.1	0.7	▼ 1.8	▲ 1.3	22.0	▼ 7.0	▲ 6.7	
IT	2.9	▼ 5.6	▲ 0.4	89.4	▲ 13.8	▲ 5.2	0.5	▲ 0.2	▼ 1.8	10.1	▼ 14.0	▼ 3.4	
CY	3.3	▲ 2.1	▼ 0.9	84.7	▼ 4.4	▲ 1.3	3.5	▲ 3.2	▼ 2.5	11.7	▲ 1.2	▲ 1.2	
LV	9.7	▼ 0.7	▼ 1.4	70.6	▲ 2.1	▼ 2.5	0.8	▲ 0.3	▼ 0.9	28.5	▼ 2.4	▲ 3.4	
LT	3.0	▲ 0.9	▼ 0.5	73.6	▼ 2.6	▼ 1.7	3.4	▲ 2.2	▲ 1.1	23.1	▲ 0.5	▲ 0.5	
LU	3.6	▼ 2.6	▲ 1.2	76.6	▲ 3.3	▲ 9.7	1	▲ 1.0	▼ 3.4	22.5	▼ 4.2	▼ 6.3	
HU	5.7	▼ 2.4	▲ 0.7	80.2	▲ 12.3	▼ 1.3	0.4	▼ 3.7	▲ 2.9	19.4	▼ 8.6	▼ 1.6	
MT	1.9	▼ 1.1	▼ 8.7	72.1	▲ 24.8	▲ 3.0	0	▼ 2.7	▲ 1.8	27.9	▼ 22.0	▼ 4.7	
NL	18.6	▲ 5.3	▼ 3.0	46.2	▲ 0.6	▲ 5.6	1.5	=	▲ 0.5	52.3	▼ 0.6	▼ 6.2	
AT	15.7	▲ 3.2	▲ 3.3	59.2	▼ 1.2	▼ 10.2	1	▲ 0.3	▼ 1.1	39.8	▲ 0.9	▲ 11.2	
PL	7.4	▼ 0.5	▼ 1.9	78.0	▲ 0.3	▲ 1.7	0.5	▼ 0.4	▲ 0.4	21.4	=	▼ 2.1	
PT	10.0	▲ 0.9	▲ 2.5	71.1	▼ 0.2	▲ 4.9	2.7	▲ 1.6	▲ 0.5	26.1	▼ 1.4	▼ 5.4	
RO	11.3	▲ 6.9	▼ 4.1	80.9	▼ 2.8	▲ 2.2	1.2	▼ 1.5	▲ 0.9	17.9	▲ 4.3	▼ 3.1	
SI	8.7	▲ 5.5	▼ 1.6	66.8	▲ 0.2	▼ 13.4	1	▲ 0.5	▼ 0.8	32.1	▼ 0.8	▲ 14.1	
SK	8.8	▼ 1.9	▼ 0.9	65.0	▼ 2.0	▲ 5.2	2.5	▼ 1.6	▲ 2.6	32.5	▲ 3.6	▼ 7.7	
FI	7.6	▼ 4.6	▲ 6.6	30.2	▼ 0.3	▲ 1.5	0.7	▲ 0.4	▼ 0.6	69.0	▼ 0.2	▼ 0.8	
SE	21.1	▲ 9.0	▼ 7.5	31.1	▼ 5.1	▼ 1.5	1.1	▼ 2.1	▲ 2.4	67.8	▲ 7.3	▼ 0.9	
IS	3.7	▼ 3.4	▼ 6.6	37.9	▼ 4.5	▼ 1.0	2.8	▼ 0.9	▲ 3.3	59.4	▲ 5.4	▼ 2.3	
NO	14.1	▼ 3.6	▼ 6.1	45.4	▼ 5.5	▲ 22.3	2.1	▼ 1.9	▲ 2.0	52.5	▲ 7.3	▼ 24.3	
UK	9.6	▼ 1.6	▼ 4.7	46.1	▲ 0.4	▲ 4.2	5.2	▲ 1.7	▲ 1.4	48.7	▼ 2.1	▼ 5.6	

 Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

The analysis of retailer's characteristics shows that retailers who received **complaints from consumers in their own country** are more likely to:

- o be in sector K (49.6%), sector N (43.2%) or in trade (NACE G) (40.4%), and are less likely to be in sector S (26.1%), sector H (22.5%) or sector J (20.4%);
- o be medium (50.8%) or large retailers (62.2%);
- o sell via distance methods (41.9%) or online (44.4%);
- o sell non-food products (42.1%) or food products (39.0%);
- o be companies where the respondent is a commercial or sales manager (40.0%).

b) Type of complaints received

Retailers who had received complaints from consumers were asked about the nature of these complaints.

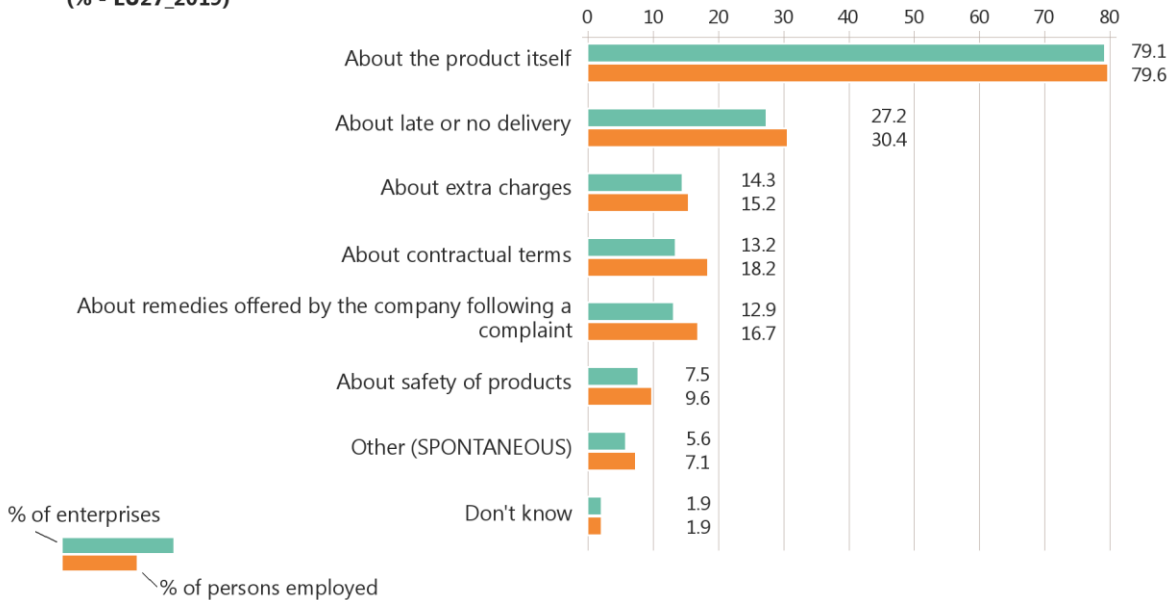
- The large majority of consumer complaints are about a product -

Complaints received from domestic consumers

Retailers in EU27_2019 are most likely to say complaints from **consumers in their own country** were **about the product** (79.1%), while more than one quarter say complaints were **about late or non-delivery** (27.2%). Less than one in five retailers say complaints **were about extra charges** (14.3%), **about contractual terms** (13.2%), or **remedies offered by the company following a complaint** (12.9%). Less than one in ten of these retailers say complaints were **about the safety of products** (7.5%), or **other types of complaints** (5.6%).

The results based on total persons employed show a slightly different pattern, with remedies offered after a complaint and contractual terms more likely to be mentioned than extra charges. In addition, for each type of complaint the proportion of persons receiving complaints is higher.

Q16 What type of complaints has your company received from consumers located in (OUR COUNTRY) during the past 12 months? Were they complaints... (MULTIPLE ANSWERS POSSIBLE)
(% - EU27_2019)



Base: All retailers in EU27_2019 that have received complaints from consumers in their own country (N=3559)

Retailers in the western region are more likely to say complaints were about the product (84.0%), late or no delivery (30.6%), extra charges (18.4%) or about contractual terms (14.7%), compared to EU27_2019. There are no differences between EU27_2019 as a whole and the northern, southern or eastern regions.

Looking at the country level results for complaints received from consumers in a retailer’s own country shows complaints about **the product** are the most mentioned. In fact, this type of complaint is mentioned by at least half of these retailers each country¹⁷. Within EU27_2019, companies in Slovakia (89.0%), France (86.7%) and Belgium (85.7%) are the most likely to have received complaints about the product from domestic consumers, although those in Iceland are even more likely to have done so (92.2%). At the other end of the scale, companies in Italy (54.8%), Romania (56.4%) and Hungary (58.1%) are the least likely to have received this kind of complaint – although these proportions are still high.

Companies in Belgium (40.8%), France (35.3%) and Sweden (32.0%) are the most likely to have received complaints about **late or no delivery**, while those in Slovakia (8.9%) Hungary (9.6%) and Estonia (10.9%) are the least likely to have done so.

¹⁷ Results from the following countries are not included in the discussion due to very small sample size: Cyprus (n=10), Luxembourg (n=31), Greece (n=36) and Malta (N=44). Results from the following countries should be interpreted with caution due to low sample size: Italy (n=52), Croatia (n=74), Romania (n=74), Hungary (n=77), Bulgaria (n=83), Poland (n=86) and Iceland (n=93).

Complaints about **extra charges** are most likely to have been received by companies in Austria (24.4%), the Netherlands (20.0%) and Belgium (19.6%), compared to 0.0% of companies in Hungary and 2.8% in Slovakia.

Retailers in the Netherlands (21.9%), France (21.8%) and Ireland (19.0%) are the most likely to have received complaints about **remedies offered following a complaint**. At the other end of the scale, retailers in Latvia (0.5%), Italy (0.7%) and Hungary (1.3%) are the least likely to mention this kind of complaint.

Companies in Italy, Austria (both 19.1%) and France (18.6%) are the most likely to have received complaints about **contractual terms**, while those in Lithuania, Bulgaria (both 3.4%), Estonia (3.7%) and Hungary (3.8%) are the least likely to mention this kind of complaint.

At least one in ten of these companies in Romania (13.2%), France (10.0%) and Hungary (8.8%) have received complaints about **product safety**, compared to 0.7% in Italy, 1.7% in the Czech Republic and 2.6% in Latvia and Belgium.

More than one in five companies in Hungary (21.0%), as well as 15.5% in Romania and 14.6% in Italy mention **other** types of complaints, compared to 1.2% in Poland and 2.1% in Sweden and Slovakia.

At EU27_2019 level, increases since 2016 are seen in the proportions of retailers who have received complaints from domestic consumers about the **product itself** (+10.9 pp) or about **late or no delivery** (+4.0 pp). On the other hand, decreases are observed for **complaints about extra charges** (-2.4 pp) or **other complaints** (-5.0 pp).

Highlights from the country trend analysis include the following changes:

The largest increase in the proportion of retailers that have received complaints **about the product itself** is observed in Portugal (+33.4 pp);

The largest increase in the proportion of companies that have received complaints about **late or no delivery** is observed in Sweden (+12.2 pp);

Companies in Finland recorded the largest decrease in the proportion receiving complaints about **extra charges** (-5.0 pp);

Retailers in Lithuania are now less likely to report complaints about **contractual terms** (-10.1 pp);

The highest increase in the proportion of companies that mention complaints about **product safety** is observed in Romania (+11.4 pp), and the largest decrease is found amongst companies in Finland (-3.9 pp);

The largest decrease in the proportion of companies that cite **other** types of complaints is observed in Estonia (-25.5 pp).

EUROPEAN COMMISSION

Q16 What type of complaints has your company received from consumers located in (OUR COUNTRY) during the past 12 months? Were they complaints... (MULTIPLE ANSWERS POSSIBLE)
(%)

	About the product itself			About late or no delivery			About extra charges			About remedies offered by the company following a complaint		
	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014
EU27_2019	79.1	▲10.9	▲0.9	27.2	▲4.0	▼3.2	14.3	▼2.4	▲3.6	12.9	▲0.9	▼1.6
EU28	80.0	▲10.1	▲1.8	25.8	▲2.4	▼3.4	14.2	▼2.0	▲1.2	13.6	▼0.1	▼1.4
REGION NORTH	79.1	▲8.3	▼1.3	24.7	▲5.4	▼3.3	7.7	=	▲2.1	11.7	=	▼3.1
REGION SOUTH	64.4	▲10.8	▼6.7	20.3	▲2.7	▼5.6	7.0	▼2.1	▼0.9	5.6	▼2.4	▼4.8
REGION EAST	70.1	▲12.4	▲0.3	18.4	▼3.2	▲4.2	6.9	▼2.4	▲2.2	8.5	▼2.9	▲0.8
REGION WEST	84.0	▲10.1	▲2.3	30.6	▲4.8	▼4.6	18.4	▼3.5	▲4.7	15.5	▲2.2	▼1.1
BE	85.7	▲14.5	▼5.6	40.8	▲3.3	▼2.2	19.6	▼4.0	▲0.1	17.8	▼8.1	▲2.0
BG	67.6	▼3.0	▲18.5	12.9	▼1.3	▼6.1	4.3	▼3.0	▲3.6	5.2	▲1.1	▼1.1
CZ	73.4	▲16.4	▼8.2	24.0	▼1.1	▲0.6	9.7	▼5.1	▲4.9	12.0	▲2.0	▼7.0
DK	77.8	▲6.9	▼0.1	25.4	▲6.0	▼1.8	11.2	▲1.1	▲2.9	15.3	▲0.9	▼5.1
DE	84.7	▲8.2	▲4.9	30.2	▲8.0	▼7.3	18.3	▼6.0	▲3.0	12.8	▲4.0	▼1.4
EE	81.3	▲21.5	▼3.2	10.9	▲2.0	▲3.6	3.2	▲0.9	▲0.7	3.0	▼0.8	▼0.3
IE	83.1	▲10.6	▲6.5	16.0	▼7.0	▲8.1	16.1	▼3.9	▲6.6	19.0	▲3.1	▲5.0
EL	70.6	▲26.9	▼11.9	15.6	▼5.7	▲14.4	9.7	▼9.3	▲9.6	15.2	▼1.9	▲8.9
ES	65.0	▲10.2	▼1.2	21.2	▲3.6	▼11.4	7.2	▼1.8	▼0.1	5.0	▼3.9	▼7.3
FR	86.7	▲19.4	▼8.0	35.3	▲2.7	▼1.9	16.5	▼0.8	▲11.7	21.8	▲3.3	▼0.1
HR	69.5	▲26.0	▼4.7	22.4	▲1.2	▲10.6	6.1	▲3.1	▼2.7	13.6	▼0.7	▼0.4
IT	54.8	▼0.9	▼7.7	17.1	▲1.0	▼2.4	4.5	▼5.2	▼2.1	0.7	▼6.0	▼1.6
CY	53.2	▼2.7	▲2.9	22.5	▲22.5	▼14.9	3.2	▼19.1	▲15.5	15.6	▲4.6	▲6.2
LV	76.7	▲15.0	▼1.7	12.6	▼4.6	▲0.2	5.3	▼2.1	▼4.9	0.5	▼1.0	▼1.0
LT	73.2	▲1.1	▲6.2	18.3	▲2.4	▲2.5	3.1	▼1.6	▲0.8	3.1	▲1.8	▲0.4
LU	50.0	▼13.8	▲30.3	38.5	▲4.6	▲6.3	20.3	▼6.0	▲11.2	7.7	▼7.0	▼5.9
HU	58.1	▲3.4	▼6.6	9.6	▼7.7	▲7.1	0.0	▼4.7	▼1.0	1.3	▼3.4	▼1.1
MT	57.2	▲12.9	▼10.8	23.9	▼8.1	▲16.4	7.0	▲2.1	▼8.5	16.6	▲2.8	▲1.5
NL	80.3	▲7.4	▲1.6	31.2	▲2.2	▼2.6	20.0	▲1.9	▼3.4	21.9	▲3.2	▼3.2
AT	74.4	▼1.5	▲14.2	21.8	▼0.5	▲7.0	24.4	▲3.2	▲5.9	13.0	▲0.8	▲5.3
PL	77.4	▲17.5	▲4.5	18.2	▼8.2	▲10.0	10.5	▼2.7	▲3.2	13.9	▼10.9	▲7.7
PT	77.4	▲33.4	▼26.1	22.8	▲2.2	▲0.9	10.2	▲5.2	▼1.0	13.3	▲7.7	▼9.9
RO	56.4	▲9.5	▼2.2	23.6	▼4.0	▲9.9	6.2	▲1.9	▲0.1	3.7	▲1.9	▼0.8
SI	69.5	▲2.7	▲19.9	19.4	▲7.1	▼0.4	7.8	▼2.0	▼2.9	4.7	▲0.5	▼1.9
SK	89.0	▲30.9	▼8.4	8.9	▲1.3	▼5.2	2.8	▲1.8	▼2.5	6.0	▼3.7	▲1.9
FI	83.1	▲2.1	▲5.1	16.8	▼6.3	▼3.5	4.4	▼5.0	▲0.3	17.4	▼1.7	▼3.9
SE	78.6	▲9.8	▼6.0	32.0	▲12.2	▼6.9	8.7	▲1.5	▲4.8	10.2	▼1.6	▼0.5
IS	92.2	▲21.7	▲2.0	29.9	▼3.0	▲0.5	11.6	▼1.6	▲1.9	15.9	▲7.2	▼1.5
NO	78.1	▲2.1	▼6.5	30.5	▲12.5	▼12.2	10.9	▲4.6	▼13.9	8.3	▲0.3	▼6.0
UK	83.9	▲6.8	▲5.7	19.9	▼4.2	▼4.0	13.3	▼0.6	▼10.3	17.0	▼3.3	▼1.6

Results statistically significantly higher than EU results (T-test at 95% level)
Results statistically significantly lower than EU results (T-test at 95% level)
Statistically significant increase from one year to the other (T-test at 95% level)
Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers that have received complaints from consumers in their own country (N=4074)

EUROPEAN COMMISSION

Q16 What type of complaints has your company received from consumers located in (OUR COUNTRY) during the past 12 months? Were they complaints...
(MULTIPLE ANSWERS POSSIBLE)
(%)

	About contractual terms			About safety of products			Other (SPONTANEOUS)			Don't know		
	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014
EU27_2019	13.2	▲ 0.6	▼ 2.6	7.5	▼ 1.0	▲ 1.5	5.6	▼ 5.0	▼ 1.8	1.9	=	▲ 1.0
EU28	12.1	▲ 0.6	▼ 3.0	8.2	▼ 0.8	▲ 0.6	5.2	▼ 4.9	▼ 1.6	2.0	▲ 0.2	▲ 0.4
REGION NORTH	12.7	▲ 1.1	▲ 1.9	5.8	▲ 0.5	▼ 0.2	5.1	▼ 6.6	▼ 0.4	1.3	▼ 0.1	▲ 0.2
REGION SOUTH	10.7	=	▼ 4.4	5.7	▼ 0.5	▼ 0.1	9.1	▼ 7.5	▲ 3.3	3.1	▼ 0.7	▲ 2.0
REGION EAST	8.0	▼ 1.9	▼ 0.9	5.8	▲ 0.9	▼ 0.7	9.1	▼ 5.9	▼ 0.6	2.2	▼ 0.4	▲ 0.2
REGION WEST	14.7	▲ 0.9	▼ 3.6	8.4	▼ 2.0	▲ 2.4	4.3	▼ 3.6	▼ 3.2	1.7	▲ 0.4	▲ 1.1
BE	11.3	▼ 4.1	▼ 3.0	7.3	▲ 2.0	▲ 0.2	4.4	▼ 3.4	▲ 1.1	0.0	▼ 2.5	▲ 1.7
BG	3.4	▼ 5.0	▼ 2.5	2.6	▲ 0.7	▼ 2.7	12.1	▲ 2.0	▼ 4.8	3.9	▲ 2.8	▼ 3.4
CZ	7.8	▼ 0.7	▼ 2.3	1.7	=	▲ 0.5	7.1	▼ 6.0	▼ 1.5	0.8	▼ 5.4	▲ 4.7
DK	12.3	▲ 3.4	▼ 0.3	6.9	▲ 1.1	▲ 0.9	7.8	▼ 8.6	▲ 4.8	1.8	▼ 0.5	▲ 0.4
DE	14.5	▲ 0.8	▼ 6.0	8.5	▼ 3.1	▲ 2.3	4.5	▼ 1.2	▼ 4.6	2.0	▲ 0.6	▲ 1.6
EE	3.7	▼ 0.6	▼ 4.3	3.7	▲ 2.4	▼ 1.4	6.7	▼ 25.5	▲ 0.5	1.4	▲ 1.4	=
IE	9.1	▼ 0.5	▲ 3.2	7.8	▼ 2.5	▲ 0.6	4.3	▼ 6.1	▼ 5.3	6.1	▲ 4.8	▼ 1.9
EL	15.0	▼ 11.9	▲ 15.8	19.0	▼ 2.5	▲ 13.7	6.7	▼ 11.2	▲ 4.2	5.7	▲ 3.7	▲ 2.0
ES	7.9	▼ 1.7	▼ 4.7	6.5	▲ 0.8	▲ 1.0	7.1	▼ 9.2	=	3.1	▼ 2.1	▲ 3.7
FR	18.6	▲ 0.9	▼ 0.4	10.0	▼ 0.9	▲ 4.4	3.2	▼ 10.3	▲ 3.3	0.2	▼ 0.9	▲ 1.5
HR	7.9	▲ 1.9	▼ 7.7	9.1	▲ 8.1	▼ 8.2	9.7	▼ 11.0	▼ 2.9	3.0	▲ 2.0	▲ 1.0
IT	19.1	▲ 6.5	▼ 6.8	0.7	▼ 5.8	▼ 2.5	14.6	▲ 1.5	▲ 4.3	3.3	▼ 0.1	▲ 1.1
CY	18.2	▼ 9.8	▲ 21.8	7.5	▼ 1.8	▲ 8.6	30.1	▲ 14.3	▼ 21.8	0.0	=	=
LV	10.0	▼ 1.4	▼ 5.2	2.6	▼ 0.5	▼ 7.3	8.8	▼ 8.9	▲ 0.5	1.6	▲ 0.2	▲ 1.4
LT	3.4	▼ 10.1	▲ 4.4	7.2	▲ 4.4	▼ 3.2	11.5	▲ 2.7	▼ 7.6	1.3	▲ 1.3	▼ 0.4
LU	2.7	▼ 8.7	▲ 6.8	8.2	▲ 6.7	▼ 4.2	14.7	▲ 2.6	▼ 10.6	1.2	▼ 2.1	▲ 0.3
HU	3.8	▼ 4.3	▲ 0.7	8.8	▲ 4.4	▼ 2.5	21.0	▼ 0.3	▲ 5.3	1.3	▼ 1.0	▲ 1.2
MT	5.5	=	▼ 5.9	11.5	▲ 3.5	▲ 1.4	7.0	▼ 6.7	▼ 4.9	5.9	▲ 5.8	▲ 0.1
NL	9.9	▲ 0.2	▼ 2.8	7.0	▼ 1.5	▲ 1.2	4.9	▼ 3.3	=	0.5	▼ 0.1	▼ 0.6
AT	19.1	▲ 2.1	▲ 8.1	6.7	▼ 1.2	▲ 4.3	3.9	▼ 4.9	▼ 20.5	2.9	▲ 0.9	▲ 0.9
PL	12.6	▼ 2.6	▲ 1.3	4.8	▼ 8.5	▲ 8.5	1.2	▼ 9.7	▼ 0.5	5.3	▲ 5.3	▼ 3.4
PT	8.7	▲ 3.2	▲ 1.4	5.8	▲ 2.1	▲ 0.1	9.7	▼ 20.3	▲ 15.5	1.8	▲ 1.8	▼ 1.2
RO	7.1	▼ 1.9	▲ 2.5	13.2	▲ 11.4	▼ 11.6	15.5	▼ 8.2	▼ 5.5	0.0	▼ 3.6	▲ 2.3
SI	13.6	▲ 5.9	▼ 4.7	4.0	▲ 1.8	▼ 0.6	11.4	▼ 0.9	▼ 10.3	0.7	▼ 0.9	▲ 0.6
SK	6.2	▼ 1.2	▼ 6.0	3.7	▲ 1.8	▼ 3.8	2.1	▼ 14.5	▲ 12.9	0.7	▼ 3.8	▲ 1.3
FI	11.2	▲ 0.5	▲ 1.2	3.4	▼ 3.9	▲ 2.6	4.9	▲ 1.1	▼ 1.9	0.5	▼ 0.5	=
SE	16.1	▲ 2.4	▲ 4.6	6.9	▲ 1.3	▼ 1.3	2.1	▼ 8.3	▼ 2.5	1.5	▼ 0.1	▲ 0.5
IS	9.3	▼ 4.2	▲ 3.8	6.9	▼ 5.5	▲ 4.2	1.5	▼ 13.6	▲ 6.2	0.7	▲ 0.3	▼ 1.1
NO	8.8	▼ 0.7	▼ 3.7	5.4	▲ 0.8	▼ 2.8	5.7	▼ 4.8	▲ 4.9	0.0	▼ 1.4	▲ 1.7
UK	7.5	▲ 0.5	▼ 4.5	11.2	=	▼ 3.7	3.6	▼ 4.5	▼ 0.3	2.5	▲ 1.2	▼ 2.4

Results statistically significantly higher than EU results (T-test at 95% level)
Results statistically significantly lower than EU results (T-test at 95% level)
Statistically significant increase from one year to the other (T-test at 95% level)
Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers that have received complaints from consumers in their own country (N=4074)

Highlights from the analysis of company characteristics for retailers who have received complaints from **consumers in their own country** are presented below.

Companies that have received complaints about the **product** are more likely to:

- o belong to sector I (85.0%), while those in sector J (61.9%), sector K (69.7%), sector L (72.3%) or sector H (69.8%) or are less likely to have received this kind of complaint;
- o have been established in 2000 or later (82.2%);
- o sell food products (87.0%) or non-food products (83.4%);
- o Be companies where the respondent is a general manager (81.9%).

Companies that received complaints about **late or no delivery** are more likely to:

- o belong the trade sector (32.9%), or in sector H (39.0%). Companies in sector I (19.3%) and sector L (9.1%) are less likely to have received this kind of complaint;
- o sell non-food products: 33.7%.

Higher proportions of companies that have received complaints about **contractual terms** can be found in the following subgroups:

- o service sector companies: 15.9%, and particularly those in sector L (34.7%) or sector K (36.8%) or sector J (22.1%). Trade sector companies are less likely to have received these kinds of complaints: 9.5%;
- o medium-sized companies: 16.6%;
- o companies established before 1990: 17.9%;
- o those engaged in distance sales (16.3%) or online sales (16.5%);
- o companies that sell services: 16.5%.

Companies that mention complaints about **extra charges**, are more likely to:

- o belong to sector N (26.4%), or sector K (23.5%);
- o be the oldest companies (established prior to 1990): 17.8%;
- o sell services: 17.8%.

Complaints about **product safety** are more likely to be mentioned by companies in trade (9.7%). Retailers in sectors L (2.2%) and J (1.7%) are less likely to have received this kind of complaint. Companies that received this type of complaint are also more likely to sell food products (10.1%).

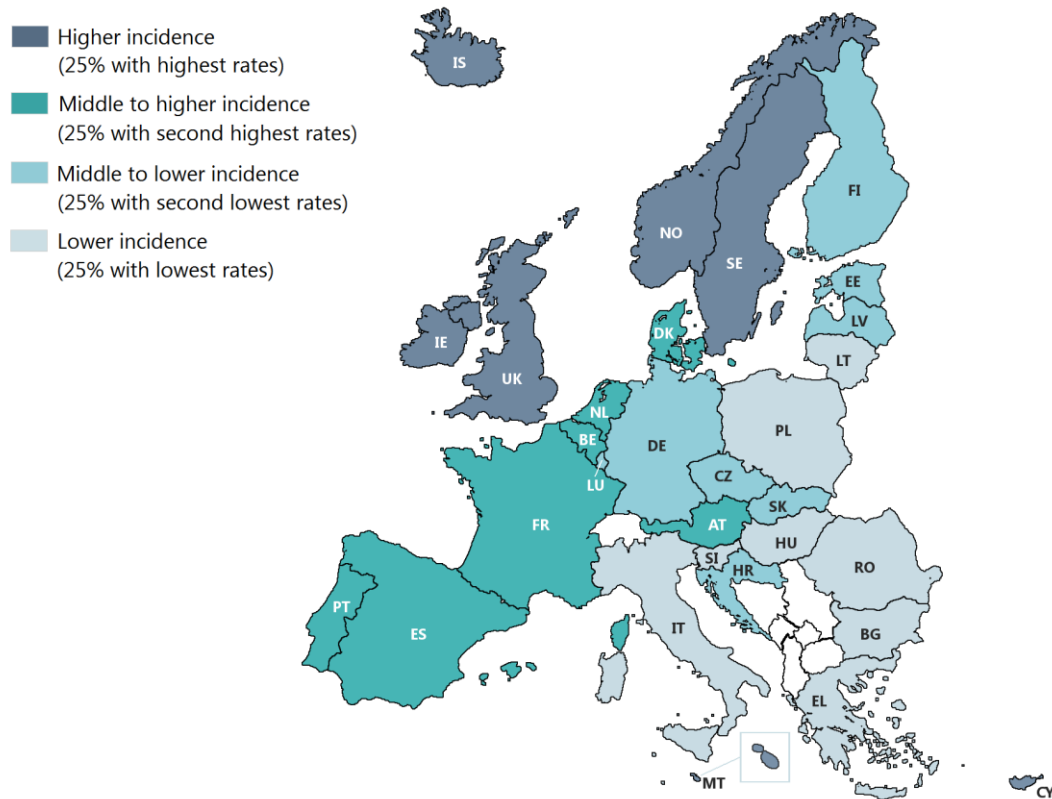
Companies that have received complaints about **remedies offered following a complaint** are more likely:

- o to be large companies (19.5%);
- o to be engaged in distance sales (15.0%);
- o that they are less likely to be in service sector J (5.1%).

Complaints received from consumers in other EU countries

Amongst retailers in EU27_2019 that sell cross-border, those in the northern region (22.3%) are more likely to have received complaints from consumers in other EU countries, compared to those in EU27_2019 overall. On the other hand, companies in eastern (9.0%) or southern (10.8%) regions are less likely to have had complaints from these consumers than those in EU27_2019 as a whole.

Q15 During the past 12 months, has your company received complaints from consumers located in other EU countries? (MULTIPLE ANSWERS POSSIBLE)
(% - TOTAL 'YES')



Base: All retailers selling in other EU countries (N=3107)

Overall, 15.5% of retailers that sell in other EU countries have received **complaints from customers in other EU countries**. Within EU27_2019, Sweden (33.5%) and Ireland (27.7%) are the only countries where at least one quarter of this group of retailers have received complaints from consumers located in other EU countries. However, it is companies in Iceland (52.8%) that are most likely to say this. At the other end of the scale 2.1% of this group of retailers in Hungary and 3.2% in Italy say the same¹⁸.

¹⁸ Results from Cyprus (n=16), Finland (n=46), Malta (n=47) and Norway (n=43) are not included in the discussion due to very low sample size. Results from the following countries should be interpreted with caution due to small sample size (50-99): Luxembourg (n=54), Poland (n=57), Iceland (n=58), Romania (n=77), the United Kingdom (n=85), Denmark (n=89), the Czech Republic (n=95), Estonia (n=99), the Netherlands (n=99).

Looking at the results in more detail shows at least one in five of these retailers in the Sweden (26.9%), Ireland (23.0%) and Denmark (20.4%) have receive complaints from customers in other EU countries through **in-house customer services**. However, it is retailers in Iceland (51.5%) that are the most likely to say this. At the other end of the scale none of these retailers in Poland. 0.5% in Hungary and 2.9% in Italy mention this.

Mentions of other mediums for customer complaints are generally very low, and in many countries no retailers mention them. Highlights from the country analysis include:

Retailers in Austria (2.8%) are the most likely to have received complaints through **non-governmental consumer organisations**;

Retailers in Luxembourg (3.1%) and Denmark (2.9%) are the most likely to have received complaints through **public authorities**;

Companies in Ireland (2.9%) and Poland (1.8%) are the most likely to mention the **courts**;

Companies in Spain are the most likely to have received complaints through **European Consumer Centres** (2.3%) or **alternative dispute resolution bodies** (2.6%);

Retailers in Luxembourg (1.8%) are the most likely to say they have received complaints through the **European Small Claims procedure**;

At least one in ten companies in Portugal (12.6%), Germany (10.5%) and Sweden (10.3%) mention receiving complaints through **other channels**.

The following highlights from the trend analysis are worth noting:

There has been an increase in the proportion of companies in EU27_2019 that have received complaints through **ADR bodies** (+0.7 pp) or via **other channels** (+2.1 pp). There have been decreases in the proportion of retailers mentioning **public authorities** (-0.7 pp) or the **courts** (-0.5 pp);

Retailers in Hungary recorded the highest decrease in the proportion receiving **complaints (via any means)** from customers in other EU countries (-11.0 pp);

The largest increase in the proportion of companies receiving complaints through **in-house customer service** in EU27_2019 is found amongst retailers in Croatia (+8.6 pp), however retailers in Iceland outside EU27_2019 are now much more likely to report this (+24.0 pp). The largest decrease is observed in Austria (-9.4 pp).

Q15 During the past 12 months, has your company received complaints from consumers located in other EU countries? (MULTIPLE ANSWERS POSSIBLE) (%)

	Yes, through in-house customer services			Yes, through non-governmental consumer organizations			Yes, through public authorities			Yes, through courts (other than through the European Small Claims Procedure)			Yes, through European Consumer Centres		
	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014
EU27_2019	11.0	▲ 0.3	▼ 1.5	0.9	▼ 0.4	▲ 1.0	0.2	▼ 0.7	▲ 0.6	0.2	▼ 0.5	▲ 0.3	0.6	▲ 0.1	▲ 0.2
EU28	12.5	▲ 1.2	▼ 0.9	0.9	▼ 0.5	▲ 1.1	0.2	▼ 0.7	▲ 0.5	0.2	▼ 0.5	▲ 0.2	0.6	▲ 0.2	▲ 0.1
REGION NORTH	18.1	▲ 4.4	▲ 1.4	0.9	▲ 0.6	▼ 0.3	1.1	▲ 0.6	▲ 0.1	0.7	▼ 0.1	▲ 0.4	0.5	▼ 0.7	▲ 0.8
REGION SOUTH	6.4	▼ 2.8	▼ 0.4	0.8	▲ 0.8	▼ 0.9	0.1	▼ 0.6	▲ 0.1	0.1	▼ 0.5	▲ 0.4	0.8	▲ 0.7	▼ 0.1
REGION EAST	4.3	▼ 2.8	▲ 1.7	0.3	▼ 0.1	▲ 0.3	0.3	=	▼ 0.5	0.4	▼ 0.2	▼ 0.3	0.1	=	▼ 0.3
REGION WEST	13.8	▲ 1.8	▼ 3.4	1.2	▼ 1.1	▲ 2.2	0.1	▼ 1.1	▲ 1.2	0.2	▼ 0.6	▲ 0.2	0.7	=	▲ 0.5
BE	19.9	▲ 1.8	▼ 2.6	1.4	▲ 0.1	▲ 0.7	1.4	▲ 0.6	▲ 0.4	1.1	=	▼ 0.2	0.0	▼ 0.8	▼ 0.7
BG	3.7	▼ 1.9	▲ 1.6	1.4	▲ 1.4	=	0.0	▼ 0.4	▼ 0.3	0.9	▲ 0.9	=	0.0	=	▼ 0.8
CZ	6.2	▼ 4.3	▲ 2.6	0.0	=	=	1.0	▼ 0.2	▼ 0.3	0.0	=	▼ 0.3	0.0	▼ 0.3	▲ 0.3
DK	20.4	▲ 4.5	▼ 4.5	1.6	▲ 1.2	▼ 0.2	2.9	▲ 2.5	▲ 0.6	1.0	▲ 0.6	▲ 0.4	0.0	▼ 0.4	▲ 0.6
DE	11.2	▲ 2.9	▼ 5.3	1.2	▼ 1.5	▲ 2.8	0.0	▼ 1.4	▲ 1.5	0.0	▼ 1.1	▲ 0.6	1.2	▲ 0.5	▲ 0.6
EE	11.3	▼ 3.7	▲ 6.4	0.0	=	=	0.0	=	=	1.2	▲ 1.2	=	0.0	=	▼ 0.5
IE	23.0	▼ 5.1	▲ 4.4	1.2	▼ 1.5	▲ 2.2	0.0	▼ 2.0	▲ 2.0	2.9	▲ 1.4	▲ 0.8	0.8	=	▼ 0.1
EL	4.1	▲ 1.1	▼ 1.9	0.0	=	▼ 0.2	0.0	=	▼ 0.5	0.0	=	=	0.0	=	=
ES	10.2	▼ 3.1	▼ 0.4	2.0	▲ 2.0	=	0.0	▼ 1.8	▲ 1.5	0.0	▼ 1.4	▲ 0.9	2.3	▲ 2.3	▼ 0.2
FR	15.8	▲ 3.3	▼ 8.3	0.7	▼ 1.0	▲ 1.9	0.0	▼ 1.3	▲ 1.0	0.0	=	▼ 0.6	0.0	▼ 1.2	▲ 1.3
HR	14.5	▲ 8.6	▲ 1.2	1.0	▲ 0.5	▲ 0.4	0.0	=	▼ 0.4	0.0	▼ 0.6	▲ 0.7	1.0	▲ 0.5	▲ 0.1
IT	2.9	▼ 4.0	▲ 1.7	0.0	=	▼ 2.3	0.0	=	=	0.0	▼ 0.2	▲ 0.3	0.0	=	=
CY	13.0	▲ 6.2	▲ 6.7	0.0	=	=	0.0	=	=	5.9	▲ 5.9	=	0.0	▼ 2.0	▲ 1.9
LV	8.4	▲ 5.0	▼ 2.7	1.0	▲ 1.0	▼ 2.1	0.0	▼ 0.7	▼ 0.3	0.6	▼ 0.3	▲ 1.0	0.0	▼ 0.9	▲ 1.0
LT	4.7	▼ 0.1	▲ 1.0	0.0	=	=	0.5	▲ 0.5	=	0.0	=	=	0.0	=	=
LU	10.4	▲ 4.4	▼ 7.3	0.0	▼ 2.7	▲ 0.1	3.1	▲ 0.4	▲ 2.2	0.0	▼ 5.5	▲ 2.3	1.4	▼ 2.4	▲ 3.9
HU	0.5	▼ 8.2	▲ 1.4	0.0	▼ 0.8	▲ 0.7	0.8	▲ 0.8	▼ 1.3	0.0	=	▼ 3.6	0.0	=	=
MT	22.9	▼ 11.0	▲ 13.5	1.4	▲ 1.4	=	0.0	=	=	0.0	=	=	0.0	▼ 4.2	▲ 4.1
NL	13.2	▼ 1.0	▼ 2.6	0.7	▲ 0.7	▼ 0.2	0.0	▼ 0.6	▼ 0.1	0.0	=	▼ 0.6	0.0	=	=
AT	15.3	▼ 9.4	▲ 19.7	2.8	▼ 0.6	▲ 3.0	0.4	▲ 0.1	▲ 0.2	0.4	▼ 0.2	▼ 0.3	0.8	▲ 0.5	▲ 0.2
PL	0.0	▼ 5.9	▲ 3.7	0.0	▼ 0.7	▲ 1.5	0.0	=	=	1.8	=	▼ 0.2	0.0	=	=
PT	9.9	▲ 4.0	▼ 2.6	1.6	▲ 1.6	▼ 0.5	1.1	▲ 1.1	▼ 3.9	0.0	=	=	0.0	=	=
RO	3.1	▲ 1.4	▲ 0.6	0.0	=	▼ 1.5	0.0	=	=	0.0	=	=	0.0	=	=
SI	7.8	▼ 3.6	▲ 8.4	0.0	▼ 0.4	▲ 0.5	0.0	=	=	0.0	▼ 0.5	▲ 0.5	0.5	▲ 0.5	=
SK	8.4	▲ 0.7	▼ 3.3	0.0	▼ 1.6	▲ 0.9	0.0	=	▼ 1.4	0.0	▼ 2.5	▲ 1.4	0.0	▼ 0.7	▼ 1.8
FI	16.4	▲ 0.7	▲ 1.4	0.0	=	=	0.0	=	▼ 0.7	0.0	=	▼ 1.9	0.0	=	=
SE	26.9	▲ 2.9	▲ 13.8	1.2	▲ 0.4	▼ 0.2	1.2	=	▼ 0.1	1.0	▼ 1.1	▲ 1.5	1.2	▼ 2.6	▲ 2.3
IS	51.5	▲ 24.0	▼ 3.0	0.0	=	▼ 1.3	0.0	=	=	0.0	=	=	0.0	=	▼ 3.1
NO	18.2	▲ 8.7	▼ 1.2	0.0	▼ 2.6	▲ 2.8	0.0	=	=	0.0	=	=	0.0	=	▼ 1.8
UK	27.4	▲ 9.3	▲ 4.8	0.0	▼ 2.4	▲ 2.5	0.0	▼ 0.8	▼ 0.4	0.0	=	=	0.5	▲ 0.5	▼ 1.4

- Results statistically significantly higher than EU results (T-test at 95% level)
- Results statistically significantly lower than EU results (T-test at 95% level)
- Statistically significant increase from one year to the other (T-test at 95% level)
- Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers selling in other EU countries (N=3107)

EUROPEAN COMMISSION

Q15 During the past 12 months, has your company received complaints from consumers located in other EU countries? (MULTIPLE ANSWERS POSSIBLE) (%)

	Yes, through alternative dispute resolution bodies (such as ombudsmen, consumer complaints board, arbitrators, mediators, or other out-of-court bodies)			Yes, through the European Small Claims Procedure			Yes, through other channels			Has not received any complaints (SPONTANEOUS)			Don't know			Total 'Yes'		
	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014
	EU27_2019	0.9	▲ 0.7	▼ 0.2	0.2	▲ 0.1	▲ 0.2	6.5	▲ 2.1	▲ 1.6	81.9	▲ 0.1	▼ 0.3	2.5	▼ 0.4	▼ 0.1	15.5	▲ 0.2
EU28	0.9	▲ 0.7	▼ 0.1	0.1	=	▲ 0.1	6.2	▲ 1.9	▲ 1.0	79.9	▼ 1.1	▼ 0.2	3.2	▼ 0.1	▼ 0.3	16.9	▲ 1.2	▲ 0.5
REGION NORTH	1.0	▲ 0.4	▲ 0.1	0.1	▼ 0.4	▲ 0.7	5.8	▲ 4.6	▼ 3.9	73.8	▼ 5.7	▲ 0.1	4.0	▼ 0.4	▲ 0.3	22.3	▲ 6.2	▼ 0.5
REGION SOUTH	1.1	▲ 1.1	▼ 0.2	0.2	▲ 0.1	▲ 0.1	3.6	▲ 1.2	▲ 0.1	86.7	▲ 0.4	▲ 4.3	2.5	▲ 0.7	▼ 3.6	10.8	▼ 1.1	▼ 0.7
REGION EAST	0.3	▲ 0.1	=	0.0	▼ 0.3	▲ 0.4	3.6	▲ 0.1	▲ 1.2	88.1	▲ 3.1	▼ 3.7	2.8	▼ 0.4	▲ 0.9	9.0	▲ 2.8	▲ 2.8
REGION WEST	0.9	▲ 0.7	▼ 0.3	0.2	▲ 0.1	▲ 0.1	8.5	▲ 2.6	▲ 3.2	79.3	▲ 0.1	▼ 1.5	2.3	▼ 0.7	▲ 1.4	18.4	▲ 0.7	▲ 0.1
BE	0.7	▼ 0.1	▲ 0.8	0.0	▼ 0.8	▲ 0.4	2.0	▼ 1.9	▼ 0.8	75.9	▼ 0.4	▲ 2.7	2.2	▼ 0.8	▲ 2.2	21.9	▲ 1.2	▼ 4.9
BG	0.0	=	▼ 0.4	0.0	=	=	3.5	▼ 1.6	▲ 4.3	82.4	▼ 6.1	▼ 0.6	8.1	▲ 7.7	▼ 3.7	9.5	▼ 1.6	▲ 4.2
CZ	0.0	=	=	0.0	▼ 0.4	▲ 0.4	7.3	▲ 3.0	▼ 0.6	82.3	▲ 1.8	▲ 4.2	3.1	▼ 0.5	▲ 1.0	14.5	▼ 1.4	▲ 3.1
DK	1.0	▼ 1.1	▲ 1.5	0.0	▼ 0.4	▲ 0.6	4.3	▲ 2.7	▼ 5.2	75.0	▼ 1.1	▲ 6.5	2.3	▼ 3.3	▼ 0.1	22.7	▲ 4.4	▼ 6.3
DE	1.2	▲ 1.2	▼ 0.9	0.0	=	=	10.5	▲ 4.7	▲ 6.2	81.6	▼ 0.2	▲ 2.5	2.2	▼ 1.1	▲ 1.8	16.2	▲ 1.4	▲ 0.7
EE	0.0	=	=	0.0	=	=	0.0	▼ 1.3	▲ 0.7	84.3	▲ 3.8	▼ 9.3	3.2	=	▲ 2.7	12.5	▼ 3.8	▲ 6.7
IE	0.0	▼ 0.4	▲ 0.4	0.0	=	=	2.3	▼ 6.3	▲ 4.3	59.2	▼ 5.1	▲ 1.4	13.1	▲ 9.5	▲ 3.0	27.7	▲ 3.5	▼ 5.1
EL	1.6	▲ 1.6	▼ 0.5	0.0	=	=	1.9	▲ 1.6	▲ 2.2	91.8	▼ 4.9	▲ 5.8	1.4	▲ 1.4	▼ 0.8	6.8	▲ 3.5	▼ 5.1
ES	2.6	▲ 2.6	▼ 0.2	0.5	▲ 0.3	▲ 0.3	5.7	▲ 4.2	▲ 1.1	76.7	▼ 4.8	▲ 3.4	4.8	▲ 1.9	▼ 2.8	18.5	▲ 2.9	▼ 0.6
FR	0.7	▲ 0.2	▲ 0.9	0.3	▲ 0.3	=	7.5	▲ 2.3	▼ 3.3	80.0	▼ 1.3	▲ 7.3	0.0	▼ 0.7	▼ 0.5	20.0	▲ 2.0	▼ 6.9
HR	1.0	▲ 1.0	=	0.0	▼ 0.5	▲ 0.4	3.1	▼ 2.7	▲ 1.8	81.7	▼ 2.9	▼ 6.5	0.6	▼ 3.4	▲ 3.7	17.6	▲ 6.2	▲ 2.8
IT	0.0	=	=	0.0	=	=	0.3	▼ 2.8	▲ 1.3	96.2	▼ 7.2	▲ 3.8	0.6	▼ 0.3	▼ 6.2	3.2	▼ 6.9	▲ 2.4
CY	0.0	=	=	0.0	=	=	5.9	▲ 3.0	▲ 2.8	68.2	▼ 22.1	▼ 3.8	7.1	▲ 7.1	▼ 5.8	24.7	▲ 15.0	▲ 9.6
LV	0.6	▲ 0.6	=	1.0	▲ 1.0	=	4.5	▲ 3.6	▼ 7.2	86.8	▼ 6.4	▲ 8.0	0.0	▼ 0.9	▼ 0.8	13.2	▲ 7.3	▼ 7.4
LT	0.5	▲ 0.5	=	0.0	=	=	3.6	▲ 2.7	▲ 0.4	85.3	▼ 3.3	▲ 4.3	6.4	▲ 0.7	▲ 2.9	8.3	▲ 2.6	▲ 1.4
LU	1.4	▼ 1.3	▲ 2.9	1.8	▼ 0.9	▲ 2.9	2.7	▼ 5.9	▲ 0.2	82.7	▼ 4.9	▲ 2.9	0.0	▼ 1.1	▼ 3.2	17.3	▼ 3.9	▲ 0.4
HU	0.0	▼ 1.0	▲ 1.0	0.0	=	=	0.8	▼ 1.9	▲ 1.2	95.7	▲ 19.6	▼ 12.1	2.1	▼ 8.7	▲ 11.5	2.1	▼ 11.0	▲ 0.6
MT	0.0	=	=	0.0	=	=	5.8	▼ 4.4	▲ 1.5	72.7	▼ 20.7	▼ 16.1	0.0	▼ 5.0	▲ 3.1	27.3	▼ 15.7	▲ 12.9
NL	1.1	▲ 1.1	=	0.0	=	=	5.7	▲ 1.2	▲ 1.5	70.6	▼ 6.9	▲ 0.5	11.2	▲ 6.5	▲ 2.8	18.2	▲ 0.4	▼ 3.3
AT	0.5	▼ 0.1	▲ 0.6	0.8	▲ 0.5	▲ 0.2	9.3	▲ 0.4	▲ 6.1	79.2	▲ 11.7	▼ 22.3	0.8	▼ 2.0	▲ 1.2	20.1	▼ 9.6	▲ 21.1
PL	1.4	▲ 1.4	=	0.0	▼ 0.7	▲ 1.5	3.3	▲ 2.0	▼ 0.3	91.8	▲ 0.8	▼ 0.9	1.8	▲ 1.8	▼ 3.3	6.5	▼ 2.5	▲ 4.2
PT	0.0	=	=	0.6	▲ 0.6	=	12.6	▲ 6.6	▲ 2.1	75.8	▼ 10.3	▲ 1.4	3.8	▲ 0.7	▲ 2.3	20.5	▲ 9.7	▼ 3.8
RO	0.0	=	=	0.0	=	=	3.1	▲ 1.4	▲ 2.1	93.1	▼ 3.5	▼ 2.8	0.7	▼ 0.7	=	6.2	▲ 2.8	▲ 2.8
SI	0.0	▼ 0.4	▲ 0.5	0.0	=	▼ 0.6	1.5	▼ 0.2	▲ 0.3	89.0	▲ 3.6	▼ 8.3	1.7	▲ 0.6	▼ 0.4	9.3	▼ 4.3	▲ 8.7
SK	0.0	▼ 0.7	▼ 0.4	0.0	=	=	4.7	▼ 2.8	▲ 3.2	84.4	▲ 11.9	▼ 2.7	2.5	▼ 4.2	▲ 2.4	13.1	▼ 7.7	▲ 0.3
FI	0.0	=	▼ 0.7	0.0	=	=	0.0	▼ 6.3	▲ 3.6	82.2	▲ 2.5	▲ 0.7	1.4	▼ 0.3	▼ 0.7	16.4	▼ 2.2	=
SE	1.7	▲ 1.7	▼ 1.7	0.0	▼ 1.7	▲ 1.8	10.3	▲ 10.3	▼ 6.3	60.9	▼ 6.1	▼ 9.7	5.6	▲ 0.3	▼ 0.6	35.5	▲ 5.8	▲ 10.3
IS	0.0	=	▼ 1.3	0.0	=	▼ 1.8	4.5	▼ 12.4	▲ 9.7	47.2	▼ 10.7	▲ 3.7	0.0	▼ 4.5	▼ 1.6	52.8	▲ 15.2	▼ 2.1
NO	2.6	▲ 2.6	=	0.0	=	=	14.5	▲ 5.0	▲ 8.8	64.6	▼ 2.8	▼ 12.8	9.6	▼ 8.3	▲ 11.8	25.8	▲ 11.0	▲ 1.0
UK	1.2	▲ 0.4	▲ 0.2	0.0	=	=	3.2	=	▼ 6.0	60.2	▼ 12.6	▲ 1.6	9.7	▲ 2.1	▼ 3.4	30.1	▲ 10.4	▲ 1.8

■ Results statistically significantly higher than EU results (T-test at 95% level)
■ Results statistically significantly lower than EU results (T-test at 95% level)
▲ Statistically significant increase from one year to the other (T-test at 95% level)
▼ Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers selling in other EU countries (N=3107)

Retailers selling in other EU countries that have received complaints from consumers in other EU countries are more likely to:

- o belong to sector I (24.6%), and less likely to belong to sector S (3.3%), sector J (8.6%), sector H (10.3%), or the trade sector (9.7%);
- o be medium-sized: 22.9%;
- o be engaged in online sales (20.9%) and particularly selling online to other EU countries (24.7%);
- o be selling food products: 26.4%;
- o sell in four or more languages (26.3%), and they are less likely to sell in one (11.5%) language.

Complaints received from consumers in other EU countries

- Complaints from consumers in other EU countries are also most likely to be about a product -

For retailers in EU27_2019 that sell in other EU countries, **complaints received from consumers in other EU countries** are most likely to have been about the product (80.8%). Just over one in five of these companies (21.7%) say they received complaints about late or no delivery. Less than one in five retailers received complaints about extra charges (15.8%), remedies offered following a complaint (14.0%), or about contractual terms (13.9%). Fewer than one in twenty retailers (4.5%) received complaints about the safety of products, while 6.7% cite other type of complaints.

The overall pattern for the results based on the proportion of persons employed is fairly similar, although contractual terms are more likely to be mentioned than extra charges and remedies offered following a complaint. In most cases, the proportion of persons receiving complaints about contractual terms or product safety is higher than that based on the number of companies.

Q17 What type of complaints has your company received from consumers located in other EU countries during the past 12 months? Were they complaints... (MULTIPLE ANSWERS POSSIBLE)
(% - EU27_2019)



Base: All retailers in EU27_2019 who have received cross-border complaints (N=478)

As the country samples range from 3 retailers in Hungary to 41 in Sweden, country analysis could not be performed for **complaints from consumers based in other EU countries**.

Since 2016, there has been an increase in the proportion of companies receiving complaints **about the product** (+21.6 pp) from consumers in another EU country, but decreases in complaints about product safety (-6.2 pp). Due to small sample sizes country trend analysis could not be performed for complaints from consumers based in other EU countries.

Due to low sample sizes in many categories¹⁹, only a limited analysis of company characteristics for retailers who have received complaints from **consumers in other EU countries** could be conducted. The results show:

- o Companies in the trade sector are more likely to say the complaint was about **late or no delivery** (36.3%). Retailers in service sector I are more likely to mention complaints about the **product** (87.4%), but less likely to mention complaints about **late or no delivery** (10.4%). On the contrary, companies in sector H are more likely to mention complaints about **late or no delivery** (63.4%), but less likely to mention those about the **product itself** (66.0%);
- o Companies established in 2000 or later are more likely to mention complaints about **late or no delivery** (32.0%);
- o Companies that sell food products are more likely to say they received complaints about the **product** (89.4%), while those that sell non-food products are more likely to mention complaints about late or no delivery (31.3%).

¹⁹ The categories for which samples are too small for a relevant analysis are: By sector, sector D (n=1), sector S (n=6), sector L (n=17), sector N (n=30), sector J (n=19), sector K (n=38); also, companies not engaged in sales to other EU countries (n=16), companies interested in selling online (n=49), companies that do not plan to continue online selling (n=26), companies where the respondent is a marketing manager (n=41).

4. Retailers in the Digital Single Market

This chapter of the report focusses on the digital single market. The proportion of retailers selling online and the channels they use are discussed and future intentions to sell online are also canvassed. Retailers' confidence to sell online, as well as perceived obstacles to selling online are also considered.

4.1. Domestic and cross-border online sales

This first section investigates domestic and cross-border online sales, as well as retailers' interest in either continuing or commencing online selling in the future.

a) Online sales domestically and cross-border

Retailers were asked whether they sell online, either domestically or cross-border.

- A small majority of retailers in EU27_2019 sell via distance methods, with more than one third selling online -

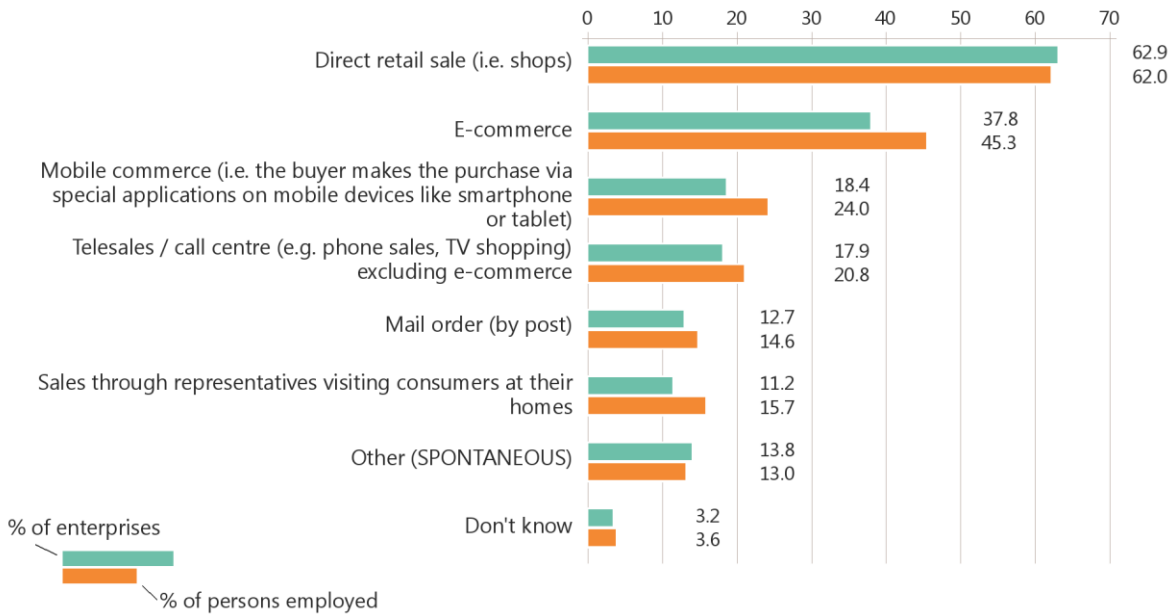
Direct retail is the most popular form of selling (62.9%), although more than half of all retailers (53.1%) currently sell via at least one distance method²⁰.

E-commerce is the most common form of distance selling (37.8%), followed by mobile commerce (18.4%) and telesales (17.9%). Just over one in ten retailers use mail order (12.7%), sales reps visiting consumers' homes (11.2%) or other methods (13.8%).

²⁰ Distance selling includes e-commerce, mobile commerce, telesales or call center, door-to-door sales and mail orders.

Compared to the proportion of retailers, the proportion of persons employed that sell via e-commerce (45.3% vs 37.8%), mobile commerce (24.0% vs 18.4%), and telesales (20.8% vs 17.9%), mail order (14.6% vs 12.7%) or sales through representatives (15.7% vs 11.2%) is higher.

D5 Do you use the following sales channels for retail? (MULTIPLE ANSWERS POSSIBLE)
 (% - EU27_2019)

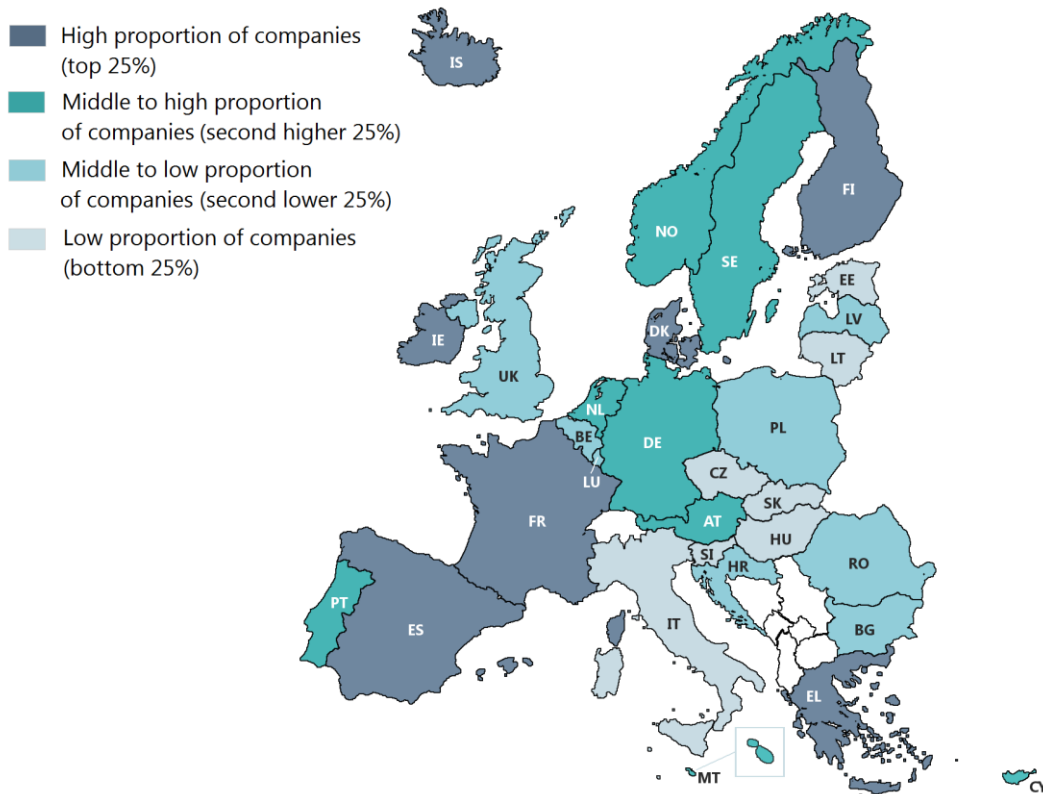


Base: All retailers in EU27_2019 (N=9796)

Overall, just over four in ten retailers sell via **e-commerce** or **mobile commerce** (41.5%), representing 48.8% of the total persons employed.

Companies in the western region are more likely to use at least one distance sales channel (57.4%), and in particular ecommerce (44.8%). Retailers in the eastern region are less likely to use distance selling (39.3%) and are less likely to use each distance method.

D5 Do you use the following sales channels for retail? (MULTIPLE ANSWERS POSSIBLE)
(% - TOTAL 'E-COMMERCE OR MOBILE COMMERCE')



Base: All retailers (N=10747)

In 13 countries, more than half of all retailers are engaged in **distance selling**. More than seven in ten retailers in Spain sell via at least one distance channel (72.7%), as do 66.8% in Greece and 65.6% in France. However, it is Iceland, outside of EU27_2019, that has the highest proportion of distance sellers (75.2%). At the other end of the scale 27.6% in Hungary, 32.1% in Estonia and 33.7% in Italy also sell via distance methods.

There are five countries where at least one quarter sell via **telesales**: Spain (40.6%), Denmark (29.6%), Cyprus (25.9%), Greece (25.5%) and Austria (25.1%). This compares to 1.8% in Estonia, 3.1% in Hungary and 3.6% in the Czech Republic.

Retailers selling via **sales reps visiting consumers at home** are most likely to be found in Luxembourg (23.6%), Spain (20.4%) and Belgium (18.1%). Within EU27_2019 they are least likely to be found in Estonia (3.5%), Romania (5.5%) and Greece (5.6%), and in Iceland (5.1%) when non-EU countries are included.

Companies in Spain (24.1%), Lithuania (18.8%) and Austria (18.1%) are the most likely to sell via **mail order** in EU27_2019. Within EU27_2019 those in Estonia (1.4%) and Sweden (3.6%) are the least likely to do so, as well as those in Norway (3.7%).

There are six countries where at least half of all retailers sell via **mobile or e-commerce**: France (58.0%), Greece (56.4%), Spain (54.0%), Ireland (51.2%) and Denmark (50.5%) in EU27_2019, and Iceland (64.2%). This compares to 20.8% of retailers in Hungary, 24.8% in Slovenia and 28.4% in Italy.

Since 2016, the proportion of EU retailers **selling via at least one distance channel** has remained stable. At a country level, the largest increase in the proportion of companies that are currently engaged in distance selling is observed amongst retailers in Portugal (+11.4 pp). This is a reversal of the trend seen in the last wave. Including countries outside EU27_2019, the largest increase is seen amongst retailers in Norway (+16.0 pp). The largest decline is observed amongst retailers in Hungary (-15.7 pp).

Looking specifically at **e-commerce and mobile commerce**, there has been no change at EU level. However, there have been changes at country level. There are six countries where the proportion of retailers selling by mobile or e-commerce has increased, with the largest observed in Finland (+13.6 pp). Conversely, the proportion of retailers in Hungary selling this way has declined (-10.7 pp).

D5 Do you use the following sales channels for retail?

(MULTIPLE ANSWERS POSSIBLE)

(% - TOTAL 'E-COMMERCE OR MOBILE COMMERCE')

		2018	2018-2016	2016-2014	2014-2012	2012-2011
EU27_2019		41.5	▲ 0.7	▲ 0.4	▼ 7.4	▲ 9.5
EU28		40.5	▲ 1.3	▼ 1.0	▼ 10.1	▲ 9.9
REGION NORTH		42.0	▲ 5.9	▲ 2.1	▼ 12.2	▲ 11.0
REGION SOUTH		41.6	▲ 0.2	▼ 0.3	▼ 10.3	▲ 16.3
REGION EAST		29.7	▼ 0.8	▲ 1.8	▼ 10.0	▲ 5.8
REGION WEST		44.8	=	=	▼ 4.0	▲ 6.7
BE		31.0	▼ 3.6	▼ 3.5	▼ 9.2	▲ 9.3
BG		36.7	▲ 2.3	▲ 2.1	▼ 3.5	▲ 6.5
CZ		28.7	▼ 5.0	▲ 3.1	▼ 14.5	▲ 5.1
DK		50.5	▲ 12.8	▼ 1.6	▼ 16.9	▲ 12.4
DE		42.2	▼ 2.6	▲ 2.0	▼ 2.1	▲ 3.8
EE		29.1	▼ 2.1	▼ 1.9	▼ 6.5	▲ 15.3
IE		51.2	▲ 1.0	▲ 2.4	▼ 16.5	▼ 4.3
EL		56.4	▲ 0.3	▲ 8.4	▼ 10.0	▲ 14.0
ES		54.0	▲ 7.0	▼ 7.4	▼ 6.1	▲ 20.0
FR		58.0	▲ 10.2	▼ 5.5	▲ 2.6	▲ 15.8
HR		36.5	▼ 0.9	▲ 4.5	▼ 17.6	N.A
IT		28.4	▼ 6.2	▲ 6.7	▼ 14.0	▲ 13.8
CY		41.9	▼ 6.0	▲ 10.8	▼ 9.4	▲ 19.3
LV		29.9	▼ 0.4	▼ 3.1	▼ 10.3	▲ 18.2
LT		29.4	▼ 0.7	▲ 3.5	▼ 3.5	▲ 4.7
LU		32.5	▼ 1.2	▲ 3.8	▼ 16.6	▲ 15.4
HU		20.8	▼ 10.7	▲ 5.1	▼ 18.5	▲ 5.5
MT		44.2	▼ 5.8	▲ 4.9	▼ 16.4	▲ 25.3
NL		45.2	▲ 1.4	▲ 4.4	▼ 31.1	▲ 11.5
AT		41.5	▼ 1.4	▲ 6.1	▲ 0.1	▼ 6.9
PL		31.0	▲ 0.4	▲ 0.1	▼ 8.6	▲ 5.0
PT		40.3	▲ 11.2	▼ 6.6	▼ 10.6	▲ 13.7
RO		29.6	▲ 7.5	▲ 0.5	▼ 4.7	▲ 4.1
SI		24.8	▼ 0.1	▲ 0.6	▼ 8.5	▲ 0.4
SK		28.9	▼ 5.5	▼ 2.9	▼ 12.8	▲ 8.3
FI		48.3	▲ 13.6	▲ 3.1	▼ 15.3	▲ 15.6
SE		44.6	▲ 3.1	▲ 6.6	▼ 10.6	▲ 6.8
IS		64.2	▲ 11.4	▼ 7.9	▼ 4.9	▲ 4.9
NO		39.3	▲ 13.2	▼ 8.5	▼ 6.0	▲ 9.1
UK		34.7	▲ 4.7	▼ 9.5	▼ 29.7	▲ 13.0

- Results statistically significantly higher than EU results (T-test at 95% level)
- Results statistically significantly lower than EU results (T-test at 95% level)
- Statistically significant increase from one year to the other (T-test at 95% level)
- Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

The analysis of company characteristics shows higher proportions of companies **currently engaged in distance selling** in the following subgroups:

- o retailers in sector N (66.8%) and sector I (55.4%). Those in sector S are less likely to engage in distance selling (41.5%);
- o medium (62.3%) or large companies (67.4%);
- o companies established before 1990: 56.2%;
- o companies selling cross-border to other EU countries: 76.2%;
- o companies that sell services (54.8%);
- o companies that sell in two (59.4%), three (59.9%), or four or more languages (68.1%);
- o companies where the respondent is a commercial or sales manager (60.7%).

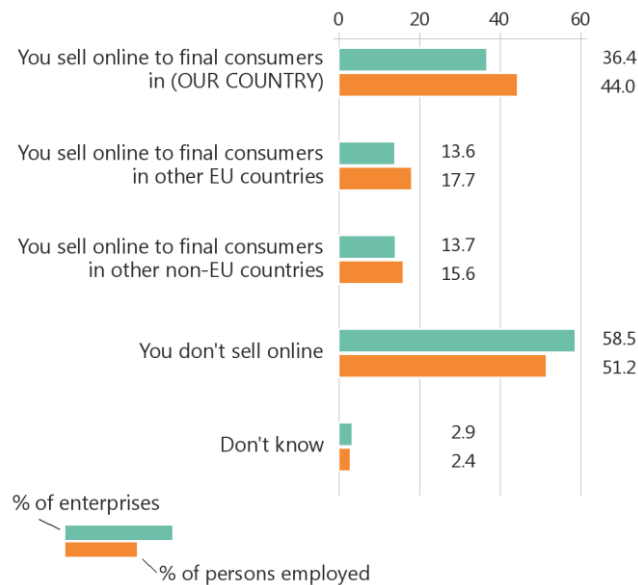
Higher proportions of companies **currently selling via mobile commerce or e-commerce** can be found in the following subgroups:

- o retailers in sector N (56.7%) or sector I (49.3%). Those in sector J (30.1%) and sector S (22.3%) are less likely to sell via e-commerce or mobile commerce;
- o medium (51.9%) or large companies (60.1%);
- o companies selling cross-border to other EU countries: 63.9%;
- o companies that sell non-food products (43.4%);
- o companies that sell in two (46.8%), three (52.2%), or four or more languages (58.9%);
- o companies where the respondent is a marketing manager (49.4%) or a commercial or sales manager: 46.7%.

Just over a third of retailers (36.4%) sell online to final consumers in their country, representing 44.0% of the total persons employed. More than one in ten (13.7%) sell online to consumers in non-EU countries and 13.6% sell online to those in other EU countries.

However, the majority of retailers do not sell online (58.5%) – this represents 51.2% of persons employed.

D6TT Please tell me which of the following statements apply to you:
(MULTIPLE ANSWERS POSSIBLE)
(% - EU27_2019)



Base: All retailers in EU27_2019 (N=9796)

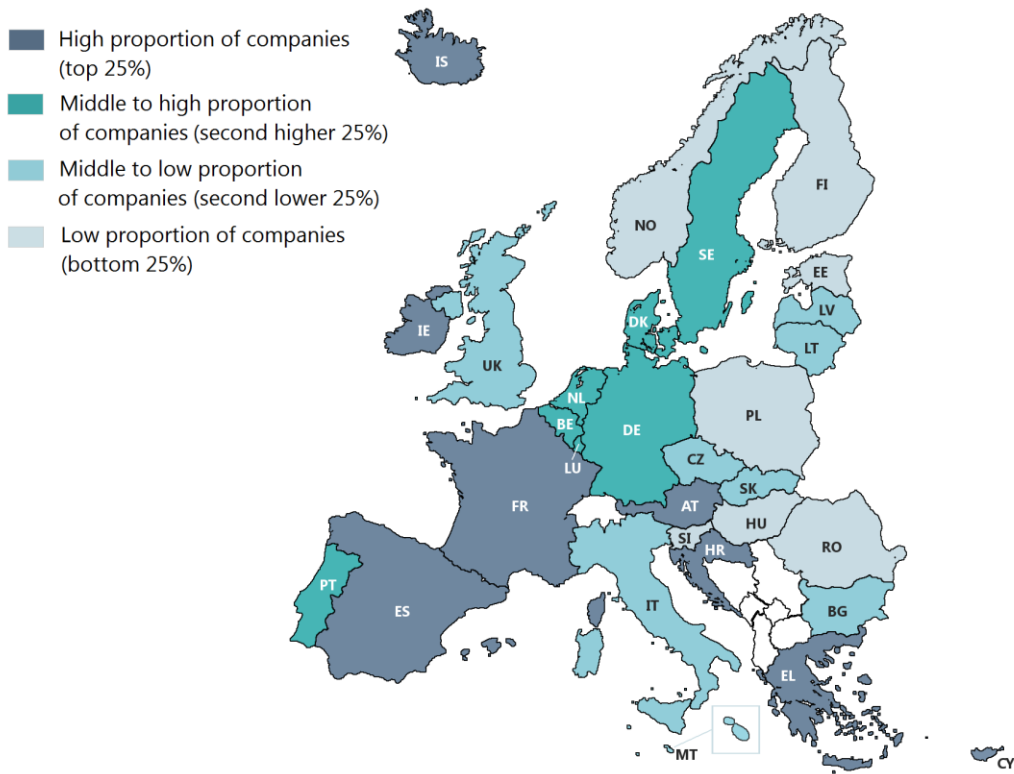
Retailers in western regions (55.2%) are more likely to say they don't sell online than those in EU27_2019 as a whole

Retailers in the western region are more likely to **sell online to consumers in their own country** (40.3%), while those in the eastern region are less likely to do so (25.1%) compared to all retailers in EU27_2019

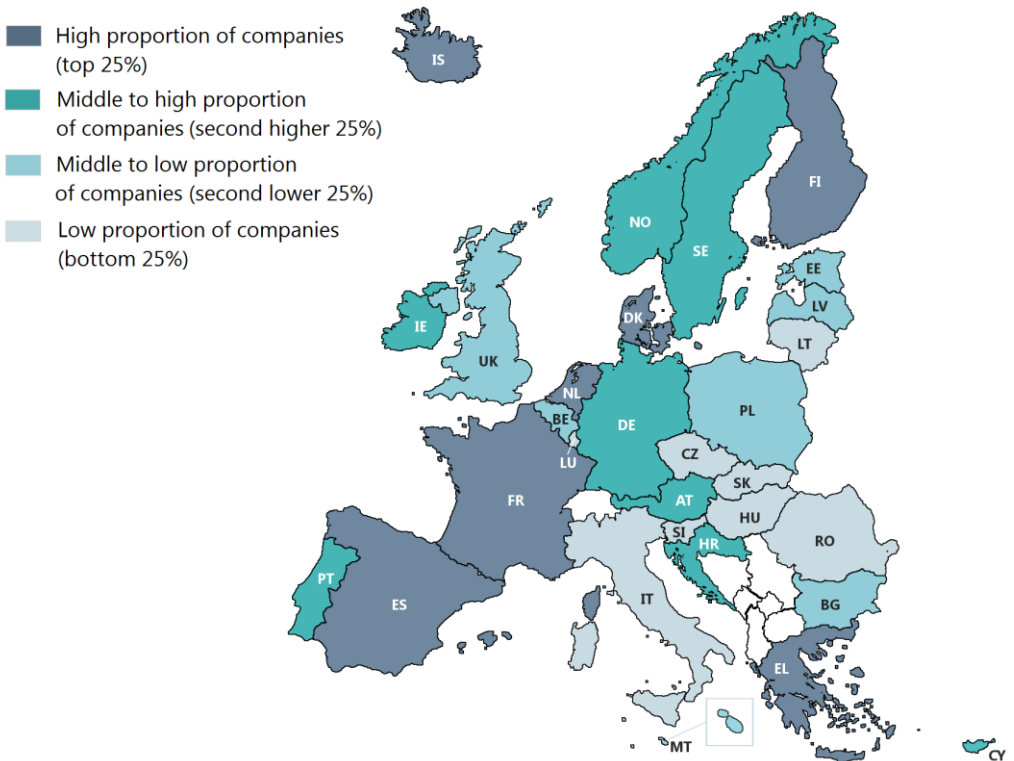
Retailers in the western region are more likely to **sell online to consumers in other EU countries** (15.8%), while those in northern (9.6%) and eastern (7.5%) regions are less likely to do so, compared to EU27_2019 overall.

As was the case for selling online to consumers in other EU countries, retailers in the northern (11.3%) and eastern (6.2%) regions are less likely to **sell online to consumers in non-EU countries**, while those in the south are more likely to do so (16.8%).

D6TT Please tell me which of the following statements apply to you:
 (MULTIPLE ANSWERS POSSIBLE)
 (% - YOU SELL ONLINE TO FINAL CONSUMERS IN OTHER EU COUNTRIES)

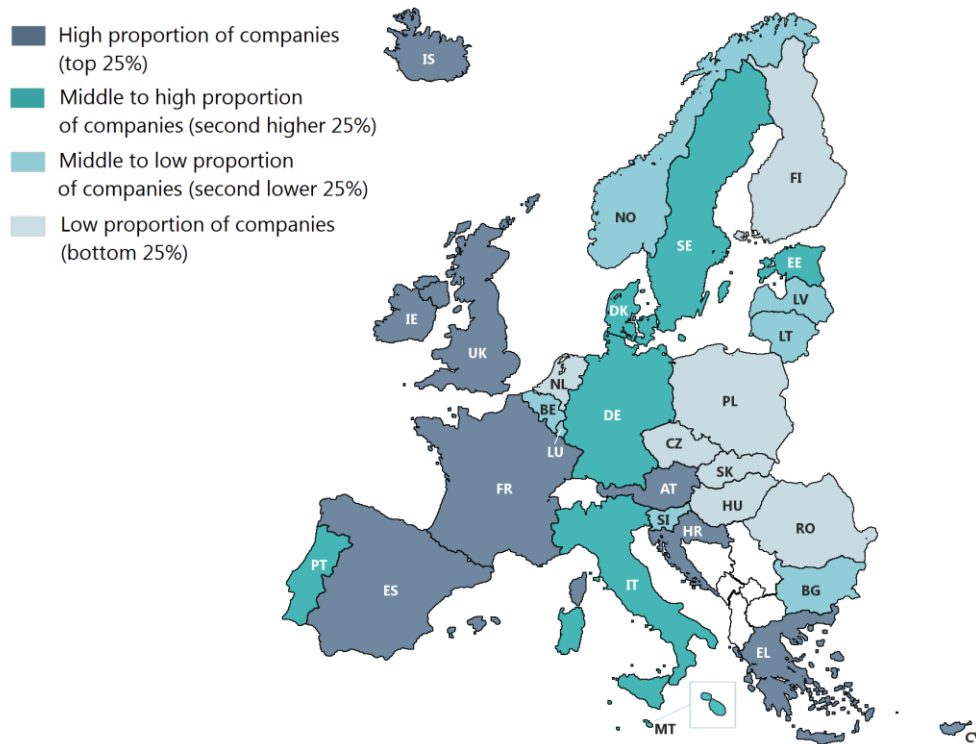


D6TT Please tell me which of the following statements apply to you:
 (MULTIPLE ANSWERS POSSIBLE)
 (% - YOU SELL ONLINE TO FINAL CONSUMERS IN (OUR COUNTRY))



Base: All retailers (N=10747)

D6TT Please tell me which of the following statements apply to you:
(MULTIPLE ANSWERS POSSIBLE)
(% - YOU SELL ONLINE TO FINAL CONSUMERS IN OTHER NON-EU COUNTRIES)



Base: All retailers (N=10747)

France is the only country in EU27_2019 where a majority of retailers sell online to **final consumers in their country** (52.2%), although 56.4% of retailers in Iceland say the same. Almost half in Greece (48.0%) and Spain (47.2%) also sell online to domestic consumers. In contrast 16.9% of retailers in Hungary and 20.1% in Slovenia also sell online to consumers in their country.

Three in ten companies in Greece (30.0%) as well as 22.5% in Cyprus and 21.7% in France sell online to **consumers in other EU countries**. At the other end of the scale, companies in Hungary (4.6%), Estonia (5.3%), Slovenia and Poland (both 5.6%) are the least likely to do so.

Companies in Greece (33.7%), France (21.4%) and Ireland (19.9%) are the most likely to sell online to final **consumers in other non-EU countries**, compared to 3.5% of retailers in Hungary, 3.8% in Slovakia and 5.0% in Romania.

Since 2016, the proportion of companies that sell online to final consumers in other **non-EU countries** (+2.2 pp) and in other EU countries (+1.7 pp) has increased. There have been no other changes.

The country level trends from 2016 to 2018 show the largest increase in the proportion of companies that sell online to consumers in their **own country** occurred in Portugal (+10.4 pp), while the largest decrease is observed amongst retailers in Hungary (-7.5 pp).

Retailers in France (+8.8 pp) within EU27_2019, and Iceland (+10.8 pp) outside EU27_2019 recorded the largest increase in the proportion of retailers that sell online to consumers in **other non-EU countries**. The largest decrease is seen amongst retailers in Malta (-10.3 pp).

Retailers in France (+9.4 pp) within EU27_2019, and Iceland (+15.5 pp) outside EU27_2019 also recorded the largest increase in the proportion selling online to consumers in **other EU countries**. The proportion saying this in Malta has decreased since 2016 (-16.1 pp).

Compared to the previous survey, the largest increase in the proportion of companies that **don't sell online** can be observed amongst retailers in the Hungary (+10.7 pp) while the largest decrease is found amongst retailers in Finland (-13.6 pp).

D6TT Please tell me which of the following statements apply to you: (MULTIPLE ANSWERS POSSIBLE)
(%)

	You sell online to final consumers in (OUR COUNTRY)			You sell online to final consumers in other EU countries			You sell online to final consumers in other non-EU countries			You don't sell online			Don't know		
	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014
EU27_2019	36.4	▲ 0.6	▼ 0.6	13.6	▲ 1.7	▲ 0.2	13.7	▲ 2.2	▼ 1.4	58.5	▼ 0.7	▼ 0.4	2.9	▼ 0.2	▲ 0.6
EU28	35.4	▲ 1.0	▼ 1.5	13.1	▲ 1.9	▲ 0.2	14.1	▲ 2.8	▼ 1.0	59.5	▼ 1.3	▲ 1.0	3.2	▲ 0.1	▲ 0.2
REGION NORTH	36.5	▲ 3.8	▲ 2.0	9.6	▲ 2.2	▲ 0.1	11.3	▲ 2.2	▲ 1.7	58.0	▼ 5.9	▼ 2.1	3.2	▲ 1.3	▼ 0.3
REGION SOUTH	35.3	▲ 1.3	▼ 5.2	14.1	▲ 1.2	▼ 0.7	16.8	▲ 1.9	▲ 0.4	58.4	▼ 0.2	▲ 0.3	1.9	▼ 0.6	▲ 1.5
REGION EAST	25.1	▲ 0.4	▲ 0.5	7.5	▲ 0.5	▲ 0.1	6.2	▼ 0.2	▲ 0.1	70.3	▲ 0.8	▼ 1.8	3.0	▼ 0.8	▲ 1.2
REGION WEST	40.3	▼ 0.6	▲ 0.6	15.8	▲ 2.1	▲ 0.6	14.9	▲ 2.9	▼ 2.8	55.2	=	=	3.3	▲ 0.1	▲ 0.1
BE	26.0	▼ 2.3	▲ 2.5	10.7	▲ 0.8	▼ 0.4	9.1	▼ 0.1	▲ 1.2	69.0	▲ 3.6	▲ 3.5	3.0	▼ 1.2	▼ 2.0
BG	31.1	▲ 3.2	▲ 0.7	9.9	▼ 0.6	▲ 4.4	7.3	▼ 2.5	▲ 5.9	63.3	▼ 2.3	▼ 2.1	3.6	▲ 0.9	▼ 0.5
CZ	23.6	▼ 3.0	▼ 0.4	9.4	▲ 1.2	▼ 3.0	5.5	▼ 0.7	▼ 0.1	71.3	▲ 5.0	▼ 3.1	3.5	▼ 1.3	▲ 2.7
DK	44.2	▲ 9.8	▼ 0.5	13.4	▲ 5.4	▲ 1.6	15.7	▲ 8.4	▼ 0.2	49.5	▼ 12.8	▲ 1.6	3.2	▲ 1.4	▼ 1.1
DE	38.6	▼ 2.8	▲ 2.9	14.6	▲ 0.9	▲ 0.3	14.0	▲ 2.2	▼ 4.1	57.8	▲ 2.6	▼ 2.0	3.1	▲ 0.1	=
EE	25.3	▼ 2.6	▼ 1.5	5.3	▼ 1.6	▼ 3.7	10.3	▼ 1.3	=	70.9	▲ 2.1	▲ 1.9	0.2	▼ 0.6	▼ 0.2
IE	39.2	▼ 3.1	▲ 0.4	17.1	▼ 4.6	▲ 1.2	19.9	▼ 0.6	▲ 1.8	48.8	▼ 1.0	▼ 2.4	7.4	▲ 1.6	▲ 1.7
EL	48.0	▼ 0.5	▲ 2.3	30.0	▲ 6.9	▲ 1.7	33.7	▲ 6.6	▲ 8.3	43.6	▼ 0.3	▼ 8.4	1.5	▲ 0.7	▲ 0.6
ES	47.0	▲ 7.2	▼ 11.8	17.8	▲ 4.3	▼ 3.4	19.3	▲ 6.8	▼ 5.3	46.0	▼ 7.0	▲ 7.4	3.2	▼ 0.5	▲ 2.6
FR	52.2	▲ 6.1	▼ 3.6	21.7	▲ 9.4	▲ 0.7	21.4	▲ 8.8	▼ 4.0	42.0	▼ 10.2	▲ 5.5	3.2	▲ 1.7	▼ 0.6
HR	33.2	▲ 6.3	▼ 2.2	18.6	▲ 2.0	▲ 0.2	18.7	▼ 2.8	▲ 1.0	63.5	▲ 0.9	▼ 4.5	0.9	▼ 2.5	▲ 2.8
IT	23.3	▼ 3.2	▲ 1.5	7.2	▼ 3.9	▲ 2.7	11.3	▼ 4.1	▲ 4.3	71.6	▲ 6.2	▼ 6.7	0.2	▼ 1.6	▲ 1.0
CY	37.1	▼ 9.6	▲ 15.9	22.5	▼ 2.9	▲ 13.9	19.0	▼ 5.6	▲ 4.1	58.1	▲ 6.0	▼ 10.8	1.0	▲ 1.0	▼ 2.0
LV	26.7	▲ 1.0	▼ 5.7	8.0	▲ 1.1	▼ 2.6	7.7	▼ 0.4	▼ 0.5	70.1	▲ 0.4	▲ 3.1	1.5	▲ 0.3	▲ 0.8
LT	24.2	▼ 3.8	▲ 3.9	7.3	▼ 2.2	▲ 2.4	9.3	▲ 0.7	▲ 2.7	70.6	▲ 0.7	▼ 3.5	0.7	▼ 0.5	▼ 0.3
LU	23.1	▼ 5.1	▲ 4.6	11.6	▼ 5.0	▲ 3.4	9.3	▼ 5.0	▲ 9.3	67.5	▲ 1.2	▼ 3.8	7.0	▲ 6.1	▼ 3.0
HU	16.9	▼ 7.5	▲ 3.4	4.6	▼ 3.0	▲ 3.8	3.5	▼ 3.9	▲ 2.2	79.2	▲ 10.7	▼ 5.1	2.3	▼ 2.5	▲ 1.4
MT	28.3	▼ 5.3	▼ 5.2	10.0	▼ 16.1	▲ 4.9	13.5	▼ 10.3	▲ 4.2	55.8	▲ 5.8	▼ 4.9	12.4	▲ 5.1	▲ 3.1
NL	41.1	▲ 4.3	▲ 2.9	10.6	▼ 0.3	▼ 0.5	6.3	▲ 0.3	▲ 1.8	54.8	▼ 1.4	▼ 4.4	3.3	▼ 2.8	▲ 0.9
AT	35.8	▼ 1.2	▲ 3.5	20.0	▼ 2.4	▲ 7.7	16.8	▼ 4.1	▲ 7.5	58.5	▲ 1.4	▼ 6.1	2.8	▼ 0.3	▲ 0.7
PL	26.7	▼ 1.0	▲ 2.2	5.6	▼ 1.1	▲ 1.0	6.3	▲ 1.8	▼ 2.8	69.0	▼ 0.4	▼ 0.1	3.8	▲ 1.1	▼ 0.9
PT	33.8	▲ 10.4	▼ 10.8	14.8	▲ 8.2	▼ 6.6	13.9	▲ 1.6	▼ 1.8	59.7	▼ 11.2	▲ 6.6	4.3	▲ 2.8	▲ 1.1
RO	24.9	▲ 8.2	▼ 1.5	6.5	▲ 4.8	▼ 1.7	5.0	▲ 2.6	▼ 1.3	70.4	▼ 7.5	▼ 0.5	3.0	▼ 1.6	▲ 3.1
SI	20.1	▲ 2.9	▼ 3.8	5.6	▲ 0.9	▼ 2.9	9.1	▼ 0.1	▲ 3.8	75.2	▲ 0.1	▼ 0.6	0.5	▼ 1.2	▼ 0.2
SK	24.2	▼ 1.6	▼ 4.6	7.5	▲ 2.5	▼ 4.1	3.8	▼ 0.2	=	71.1	▲ 5.5	▲ 2.9	2.3	▼ 3.1	▲ 2.1
FI	41.8	▲ 9.2	▲ 2.8	6.0	▲ 1.1	▲ 1.6	6.4	▲ 1.4	▲ 0.4	51.7	▼ 13.6	▼ 3.1	5.5	▲ 3.8	▲ 1.2
SE	39.2	▲ 1.9	▲ 6.2	11.4	▲ 4.0	▼ 1.8	13.2	▲ 1.3	▲ 3.2	55.4	▼ 3.1	▼ 6.6	4.1	▲ 1.4	▼ 0.7
IS	56.4	▲ 8.1	▼ 7.8	32.3	▲ 15.5	▼ 15.0	33.3	▲ 10.8	▼ 8.7	35.8	▼ 11.4	▲ 7.9	1.5	▲ 0.1	▲ 0.7
NO	35.2	▲ 9.9	▼ 5.1	6.2	▲ 0.8	▼ 0.6	8.5	▲ 3.6	▼ 3.3	60.7	▼ 13.2	▲ 8.5	2.1	▲ 1.4	▼ 0.6
UK	29.1	▲ 2.9	▼ 7.0	10.0	▲ 2.7	▲ 0.8	16.3	▲ 6.3	▲ 1.2	65.3	▼ 4.7	▲ 9.5	4.9	▲ 1.6	▼ 2.3

Results statistically significantly higher than EU results (T-test at 95% level)
Results statistically significantly lower than EU results (T-test at 95% level)
Statistically significant increase from one year to the other (T-test at 95% level)
Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

The analysis of company characteristics shows the proportion of companies that **sell online to consumers in their own country** is higher amongst companies:

- o in sector N (48.5%) or sector I (42.6%), and lower for those in sector H (27.3%), sector J (27.2%) or sector S (16.5%);
- o that are medium (46.5%) or large in size (55.7%);
- o established prior to 1990: 38.8%;
- o selling to other EU countries (54.9%), and particularly selling online to other EU countries (88.1%);
- o selling non-food products: 39.7%;
- o selling in two (41.3%), three (45.7%) or four or more languages (49.6%);
- o where the respondent is a commercial or sales manager (40.6%) or a general manager (41.8%).

Companies that **sell online to final consumers in other EU countries, or to consumers in other non-EU countries** are more likely to:

- o be in the service sector, particularly in sector I - accommodation and food service activities. Companies in the trade sector and in sector S, sector J and sector H are statistically less likely to do this;
- o be medium sized;
- o sell services;
- o sell in two or more languages;
- o be retailers where the respondent is a marketing manager or a commercial or sales manager.

Moreover, companies that **sell online to final consumers in other EU countries** are also more likely to be large companies (21.2%) or in sector N (19.9%).

Finally, almost half (46.9%) of retailers that are engaged in cross-border sales to other EU countries also sell online to consumers in other EU countries.

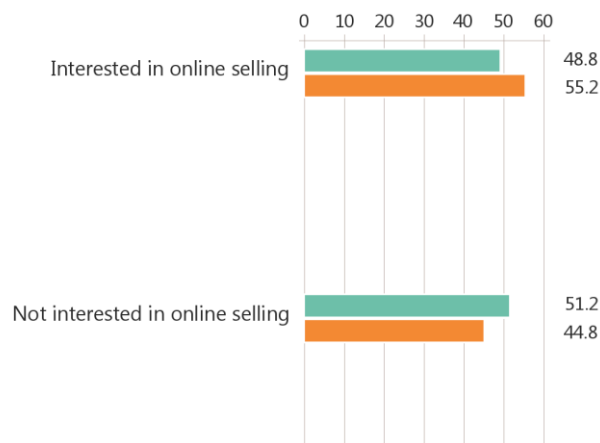
b) Future interest in online selling

Retailers were asked about their future plans for online selling. Those who **do not currently sell online** were asked if they planned to start online sales, while those who **currently sell online** were asked if they plan to continue to do so.

- Almost half of all retailers are interested in selling online in the next 12 months -

Overall, 48.8% of all retailers are **interested in selling online in the next 12 months**. This proportion of companies represents 55.2% of the total persons employed.

O1_r Interest in online selling
(% - EU27_2019)

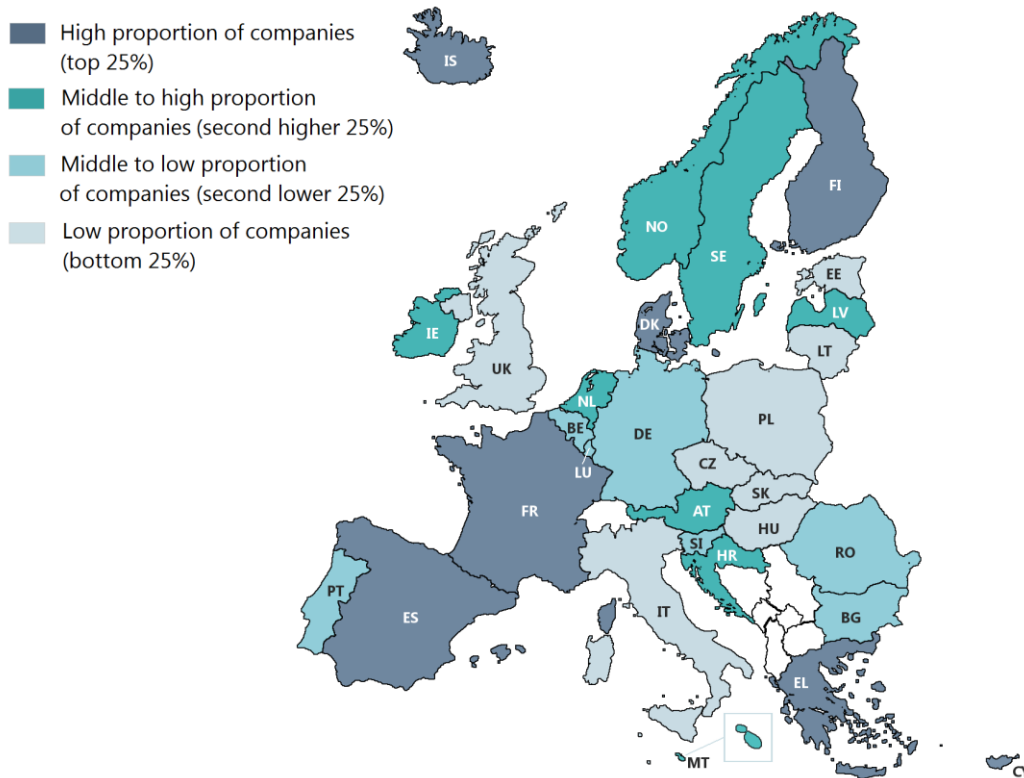


Base: All retailers in EU27_2019 (N=9796)

Companies in the northern region (54.8%) are more likely to be **interested in selling online in the next 12 months**, while those in the eastern region (42.6%) are less likely to be interested than those in EU27_2019 overall.

O1_r Interest in online selling

(% - **INTERESTED IN ONLINE SELLING**)



Base: All retailers (N=10747)

In 14 countries, at least half of all retailers are **interested in online selling**, with those in Greece (67.0%), Spain (66.7%) and France (65.8%) the most likely to be so. However, it is companies in Iceland, outside EU27_2019, that are most likely to be interested (75.4%). At the other end of the scale 30.8% of companies in Hungary, 32.6% in Italy and 34.9% in the Czech Republic are interested in online selling.

Across EU27_2019, the proportion of retailers interested in online selling has fallen since 2016 (-1.5 pp). Retailers in Romania within EU27_2019 (+10.7 pp) and Norway outside EU27_2019 (+10.7 pp) are now more likely to be interested in online selling, while those in Italy are less likely to be so (-18.4 pp).

O1_r Interest in online selling
 (% - INTERESTED IN ONLINE SELLING)

		2018	2018-2016	2016-2014
EU27_2019		48.8	▼ 1.5	▼ 2.1
EU28		47.8	▼ 0.7	▼ 3.3
REGION NORTH		54.8	▲ 4.1	▼ 0.1
REGION SOUTH		50.0	▼ 4.5	▼ 5.6
REGION EAST		42.6	▼ 0.6	▲ 0.5
REGION WEST		49.3	▼ 1.5	▼ 0.8
BE		44.1	▲ 1.3	▼ 2.8
BG		49.3	▼ 1.4	▲ 0.1
CZ		34.9	▼ 0.9	▼ 1.3
DK		59.8	▲ 9.7	▼ 1.6
DE		44.3	▼ 3.1	▲ 0.5
EE		41.8	▼ 0.9	▼ 14.9
IE		57.1	▼ 5.9	▲ 4.3
EL		67.0	▼ 6.3	▲ 1.3
ES		66.7	▲ 10.4	▼ 14.0
FR		65.8	▲ 6.5	▼ 1.7
HR		54.0	▲ 0.1	▼ 0.2
IT		32.6	▼ 18.4	▲ 0.9
CY		61.0	▼ 4.3	▲ 11.9
LV		51.7	▼ 0.5	▼ 7.1
LT		39.6	▼ 5.8	▲ 8.1
LU		44.5	▲ 0.1	▲ 1.2
HU		30.8	▼ 6.9	▲ 1.1
MT		52.2	▼ 10.5	▼ 5.8
NL		51.6	▼ 3.8	▼ 1.0
AT		51.8	▲ 2.2	▲ 4.9
PL		41.6	▼ 6.3	▲ 1.4
PT		48.4	▲ 4.9	▼ 4.3
RO		50.7	▲ 10.7	▲ 2.4
SI		46.4	▲ 3.8	▲ 5.0
SK		36.5	▲ 1.6	▼ 13.6
FI		59.2	▲ 2.7	▲ 2.2
SE		58.9	▲ 6.9	▲ 0.6
IS		75.4	▲ 10.4	▼ 4.4
NO		52.8	▲ 10.7	▼ 8.0
UK		41.3	▲ 3.5	▼ 9.9

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

The analysis of company characteristics shows retailers **interested in selling online in the next 12 months** are more likely to:

- o be in service sector N (55.5%), sector K (54.6%) or sector I (54.3%). They are less likely to be in service sector J (38.2%) or S (31.0%);
- o be medium (57.8%) or large companies (66.8%);
- o be the oldest companies (established before 1990): 52.4%;
- o sell non-food products (52.8%), and are less likely to sell food products (43.2%);
- o sell in two (54.0%), three (62.2%) or four or more languages (64.1%);
- o already sell online (91.8%), or sell online to other EU countries (97.8%);
- o be confident to sell online: 80.7%;
- o be companies where the respondent is a marketing manager (56.9%).

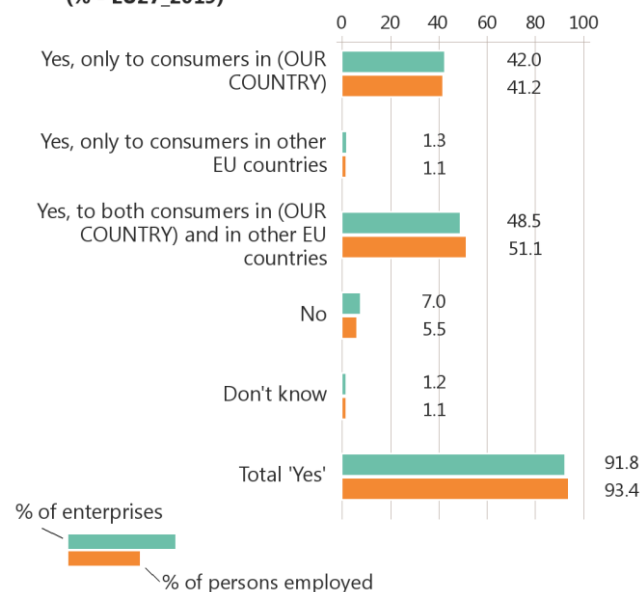
- Almost every retailer currently selling online plans to continue to do so over the next 12 months -

Amongst companies in EU27_2019 that currently sell online, more than nine in ten (91.8%) **plan to continue to sell online over the next 12 months**, which represents 93.4% of the total persons employed in this group of retailers.

Around four in ten of these companies (42.0%) plan to sell online only to consumers in their country over the next 12 months, while almost half (48.5%) plan to sell online consumers in their own and in other EU countries. Around one in a hundred companies plan to sell online only to consumers in other EU countries (1.3%) in the coming year.

Less than one in ten (7.0%) do not plan to continue to sell online over the next 12 months.

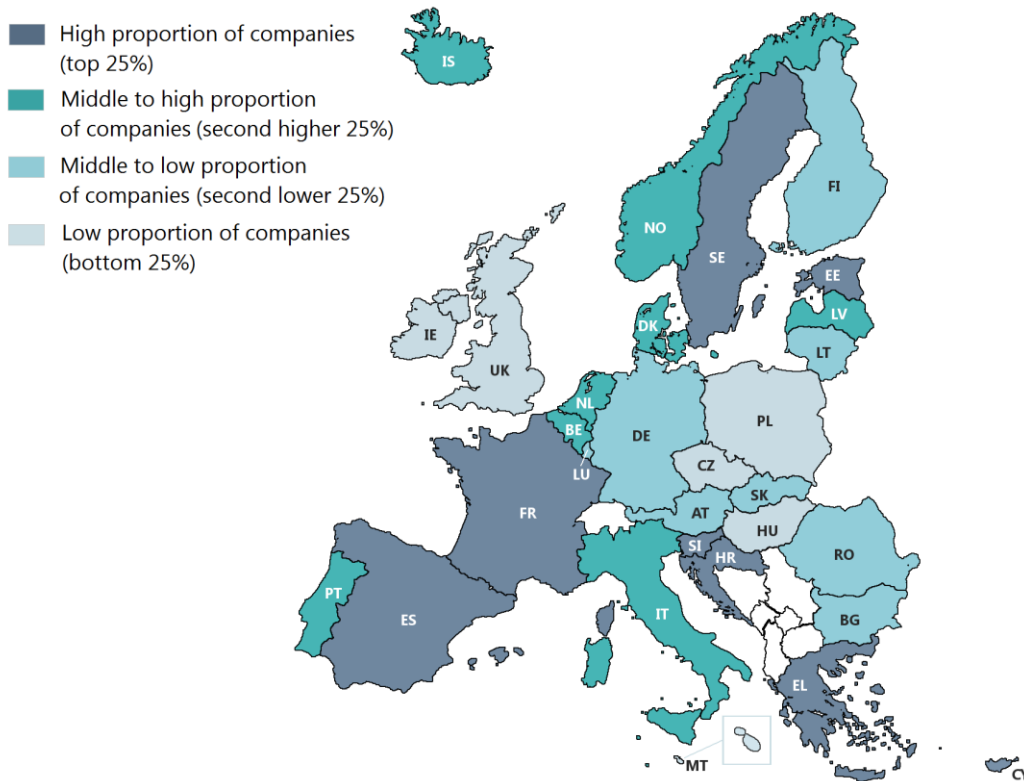
Q1b Does your company plan to continue to sell online over the next 12 months?
(% - EU27_2019)



Base: All retailers in EU27_2019 currently selling online (N=3825)

Retailers in the northern (93.0%) and southern (93.6%) regions are more likely to say they are **planning to continue to sell online**, while those in the eastern region (88.0%) are less likely to say this compared to EU27_2019 as a whole.

Q1b Does your company plan to continue to sell online over the next 12 months?
(% - TOTAL 'YES')



Base: All retailers currently selling online (N=4234)

In all countries, at least eight in ten retailers who already sell online plan to continue to do so over the next 12 months, ranging from 98.8% of retailers in Cyprus, 97.2% in Estonia and 96.7% in Slovenia to 80.6% in Malta, 84.4% in the Czech Republic and 84.7% in the United Kingdom.

Looking at the results in more detail shows these retailers in Finland (65.4%), Sweden (55.2%) and the Netherlands (54.4%) in EU27_2019, as well as those in Norway (66.4%), are the most likely to be planning to continue to sell online only **to consumers in their own country**. This compares to 14.1% of retailers in Luxembourg, 19.5% in Austria and 24.1% in Greece.

Retailers in Luxembourg (67.2%), Greece (66.7%) and Austria (65.9%) are the most likely to plan to continue to sell online to consumers **in their own or in other EU countries**. Retailers in Finland (23.0%) in EU27_2019, and those outside EU27_2019 in Norway (26.3%) are the least likely to say this.

Retailers in Cyprus (10.4%) and Hungary (8.4%) within EU27_2019, as well as those in Iceland (8.5%), are the most likely to be planning to continue to sell online only **to consumers in other EU countries**.

Compared to 2016, there has been an increase in the proportion of retailers planning to continue to sell online to **domestic and other EU consumers** (+5.6 pp), and a decrease in the proportion planning to continue to sell online **only to domestic consumers** (-4.7 pp).

At a country level, the largest increase in the proportion of companies that plan to **continue to sell online** over the next 12 months is found in Slovakia (+15.8 pp), reversing the trend seen in the last wave. Companies in Finland are less likely to say they plan to continue to sell online (-10.8 pp).

































Retailers in France are less likely to say they plan to continue to sell online over the next 12 months **only to consumers in their country**, compared to 2016 (-13.6 pp).

Retailers in Hungary are more likely to say they plan to continue to sell online over the next 12 months **only to consumers in other EU countries** (+6.1 pp).

The largest increase in the proportion of companies that plan to continue to sell online over the next 12 months to **consumers in their country and in other EU countries** can be observed amongst retailers in France (+11.9 pp) and the largest decrease amongst those in Italy (-12.9 pp).

EUROPEAN COMMISSION

Q1b Does your company plan to continue to sell online over the next 12 months?
(%)

	Yes, only to consumers in (OUR COUNTRY)			Yes, only to consumers in other EU countries			Yes, to both consumers in (OUR COUNTRY) and in other EU countries			No			Don't know			Total 'Yes'		
	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014
EU27_2019 	42.0	▼ 4.7	▲ 1.7	1.3	▲ 0.3	▼ 0.5	48.5	▲ 5.6	▼ 2.6	7.0	▼ 1.7	▲ 1.5	1.2	▲ 0.5	▼ 0.1	91.8	▲ 1.2	▼ 1.4
EU28 	41.1	▼ 5.3	▲ 0.4	1.2	▲ 0.3	▼ 0.4	48.7	▲ 5.5	▼ 0.7	7.8	▼ 1.1	▲ 1.3	1.2	▲ 0.6	▼ 0.6	91.0	▲ 0.5	▼ 0.7
REGION NORTH	54.7	▼ 2.5	▼ 2.7	0.3	▼ 0.2	▼ 1.1	38.0	▲ 2.1	▲ 3.6	5.7	▲ 0.3	▲ 0.8	1.3	▲ 0.3	▼ 0.6	93.0	▼ 0.6	▼ 0.2
REGION SOUTH	36.5	▼ 2.8	▼ 5.3	1.9	▲ 0.7	▼ 0.2	55.2	▲ 0.3	▲ 3.8	4.1	▲ 0.1	▲ 1.6	2.3	▲ 1.7	▲ 0.1	93.6	▼ 1.8	▼ 1.7
REGION EAST	45.6	▼ 0.4	▲ 3.4	3.0	▲ 1.7	▼ 1.2	39.4	▼ 1.8	▲ 4.4	10.4	▼ 0.3	▲ 1.8	1.6	▲ 0.8	▼ 1.6	88	▼ 0.5	▼ 0.2
REGION WEST	42.0	▼ 6.7	▲ 5.9	0.8	▼ 0.2	▼ 0.5	48.7	▼ 9.6	▼ 6.3	7.7	▼ 2.9	▲ 0.8	0.8	▲ 0.2	▲ 0.1	91.5	▲ 2.7	▼ 0.9
BE 	38.1	▼ 6.3	▲ 4.0	1.7	▲ 1.7	▼ 4.2	51.1	▲ 7.0	▲ 1.3	9.1	▼ 2.4	▼ 1.1	0.0	=	=	90.9	▲ 2.4	▲ 1.1
BG 	40.9	▼ 4.8	▼ 11.7	6.2	▲ 5.4	▼ 0.8	42.4	▼ 6.1	▲ 16.8	8.4	▲ 3.4	=	2.1	▲ 2.1	▼ 4.3	89.5	▼ 5.5	▲ 4.3
CZ 	38.2	▼ 8.1	▼ 0.3	0.0	▼ 1.6	▼ 1.0	46.2	▲ 4.8	▼ 1.3	13.4	▲ 3.6	▲ 2.7	2.2	▲ 1.3	▼ 0.1	84.4	▼ 4.9	▼ 2.6
DK 	52.7	▼ 5.9	▼ 3.1	0.0	▼ 0.6	▼ 2.6	41.6	▲ 6.4	▲ 6.0	4.7	▼ 0.4	▼ 0.2	1.0	▲ 0.5	▼ 0.1	94.3	▼ 0.1	▲ 0.3
DE 	42.2	▼ 5.6	▲ 8.9	0.6	▼ 0.3	▼ 1.0	47.6	▲ 11.4	▼ 9.4	8.8	▼ 5.6	▲ 1.4	0.8	▲ 0.1	▲ 0.1	90.4	▲ 5.5	▼ 1.5
EE 	49.0	▲ 5.6	▼ 3.6	1.0	▼ 0.4	▲ 0.6	47.2	▼ 6.3	▲ 5.4	1.8	▲ 1.8	▼ 3.3	1.0	▼ 0.7	▲ 0.9	97.2	▼ 1.1	▲ 2.4
IE 	32.8	▼ 3.0	▲ 4.9	1.8	▲ 1.2	▼ 1.5	52.0	▼ 5.6	▼ 2.5	10.1	▲ 5.8	▼ 2.6	3.3	▲ 1.6	▲ 1.7	86.6	▼ 7.4	▲ 0.9
EL 	24.1	▼ 5.5	▼ 7.9	5.5	▲ 2.6	▲ 2.5	66.7	▲ 1.9	▲ 3.7	2.4	▼ 0.3	▲ 1.7	1.3	▲ 1.3	=	96.3	▼ 1.0	▼ 1.7
ES 	40.0	▼ 8.5	▼ 0.4	2.1	▲ 1.4	▼ 0.4	52.9	▲ 6.9	▼ 1.6	4.2	▼ 0.3	▲ 2.1	0.8	▲ 0.5	▲ 0.3	95.0	▼ 0.2	▼ 2.4
FR 	46.5	▼ 13.6	▲ 7.7	0.4	▲ 0.4	▼ 0.6	49.2	▲ 11.9	▼ 3.1	3.9	▲ 1.4	▼ 3.8	0.0	▼ 0.1	▼ 0.2	96.1	▼ 1.3	▲ 4.0
HR 	30.1	▲ 3.5	▲ 3.3	2.9	▼ 2.4	▼ 0.6	63.3	▲ 2.4	▼ 6.6	1.9	▼ 4.5	▲ 3.7	1.8	▲ 1.0	▲ 0.2	96.3	▲ 3.5	▼ 3.9
IT 	39.3	▲ 9.3	▼ 8.8	0.0	▼ 0.8	▼ 1.5	51.6	▼ 12.9	▲ 9.5	3.8	▲ 0.2	▲ 1.1	5.3	▲ 4.2	▼ 0.3	90.9	▼ 4.4	▼ 0.8
CY 	28.0	▼ 14	▲ 6.3	10.4	▲ 4.5	▲ 4.4	60.4	▲ 9.6	▼ 5.8	1.2	▼ 0.1	▼ 2.5	0.0	=	▼ 2.4	98.8	▲ 0.1	▲ 4.9
LV 	41.8	▼ 2.3	▼ 11.7	1.7	▲ 1.7	▼ 3.1	50.0	▼ 0.7	▲ 14.1	4.4	▲ 1.8	▼ 0.3	2.1	▼ 0.5	▲ 1.0	93.5	▼ 1.3	▼ 0.7
LT 	47.2	▲ 5.4	▼ 8.0	1.9	▲ 0.5	▲ 1.5	40.5	▼ 10.1	▲ 12.9	5.8	▼ 0.4	▼ 1.7	4.6	▲ 4.6	▼ 4.7	89.6	▼ 4.2	▲ 6.4
LU 	14.1	▼ 10.5	▼ 2.7	6.4	▼ 0.6	▲ 7.2	67.2	▲ 1.4	▲ 1.8	12.3	▲ 9.7	▼ 6.3	0.0	=	=	87.7	▼ 9.7	▲ 6.3
HU 	42.7	▲ 3.6	▼ 13.2	8.4	▲ 6.1	▲ 1.5	35.7	▼ 2.2	▲ 6.5	10.7	▼ 8.5	▲ 4.4	2.5	▲ 1.0	▲ 0.8	86.8	▲ 7.5	▼ 5.2
MT 	34.3	▲ 11.7	▼ 6.2	0.0	▼ 8.3	▲ 4.1	46.3	▼ 9.4	▼ 3.5	16.9	▲ 6.0	▲ 5.0	2.5	=	▲ 0.6	80.6	▼ 6.0	▼ 5.6
NL 	54.4	▲ 3.5	▼ 1.8	1.4	▲ 0.8	▲ 0.3	37.8	▼ 1.3	▲ 0.3	5.3	▼ 3.3	▲ 0.2	1.1	▲ 0.3	▲ 1.0	93.6	▲ 3.0	▼ 1.2
AT 	19.5	▼ 9.0	▼ 0.8	2.7	▼ 3.1	▲ 3.2	65.9	▲ 7.5	▼ 3.4	11.2	▲ 3.9	▲ 1.9	0.7	▲ 0.7	▼ 0.9	88.1	▼ 4.6	▼ 1.0
PL 	51.3	▼ 3.9	▲ 4.8	0.8	▲ 0.8	▼ 1.7	34.6	▼ 3.8	▲ 3.0	12.6	▲ 7.1	▼ 3.7	0.7	▼ 0.2	▼ 2.4	86.7	▼ 6.9	▲ 6.1
PT 	30.0	▼ 1.7	▼ 1.0	0.8	▼ 1.2	▲ 2.3	61.5	▲ 0.2	▼ 3.8	5.9	▲ 1.9	▲ 2.1	1.8	▲ 0.8	▲ 0.4	92.3	▼ 2.7	▼ 2.5
RO 	51.2	▲ 8.2	▼ 6.8	2.8	▲ 2.8	▼ 1.0	33.7	▼ 3.4	▲ 4.3	10.6	▼ 8.2	▲ 5.4	1.7	▲ 0.6	▼ 1.9	87.7	▲ 7.6	▼ 3.5
SI 	42.0	▲ 4.1	▼ 12.8	1.2	▲ 0.2	▼ 2.1	53.5	▼ 4.0	▲ 25.3	3.3	▼ 0.3	▼ 7.1	0.0	=	▼ 3.3	96.7	▲ 0.3	▲ 10.4
SK 	50.4	▲ 3.6	▼ 8.4	5.0	▲ 0.8	▼ 4.5	33.9	▲ 11.4	▼ 4.5	10.0	▼ 15.2	▲ 17.3	0.7	▼ 0.6	▲ 0.1	89.3	▲ 15.8	▼ 17.4
FI 	65.4	▼ 8.7	▼ 1.8	0.0	▼ 0.8	▼ 0.2	23.0	▼ 1.3	▲ 2.7	10.5	▲ 9.7	▼ 0.7	1.1	▲ 1.1	=	88.4	▼ 10.8	▲ 0.7
SE 	55.2	▼ 6.2	▲ 2.1	0.0	=	=	39.8	▲ 10.8	▼ 3.9	4.3	▼ 3.8	▲ 2.6	0.7	▼ 0.8	▼ 0.8	95.0	▲ 4.6	▼ 1.8
IS 	37.7	▼ 9.6	▲ 8.0	8.5	▲ 2.6	▲ 1.2	47.9	▲ 4.9	▼ 7.3	5.9	▲ 2.1	▼ 1.9	0.0	=	=	94.1	▼ 2.1	▲ 1.9
NO 	66.4	▼ 1.9	▲ 1.0	0.0	=	=	26.3	▲ 0.2	▼ 3.7	5.5	▲ 0.7	▲ 2.0	1.8	▲ 1.0	▲ 0.7	92.7	▼ 1.7	▼ 2.7
UK 	34.1	▼ 9.5	▼ 9.7	0.3	▲ 0.3	=	50.3	▲ 4.3	▲ 13.7	14.4	▲ 4.0	▼ 0.2	0.9	▲ 0.9	▼ 3.8	84.7	▼ 4.9	▲ 4.0

- Results statistically significantly higher than EU results (T-test at 95% level)
- Results statistically significantly lower than EU results (T-test at 95% level)
- Statistically significant increase from one year to the other (T-test at 95% level)
- Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers currently selling online (N=4234)

The analysis of company characteristics shows that retailers that plan to **continue to sell online** in the next 12 months are more likely to belong to the following subgroups:

- o companies in service sector I (93.6%). They are less likely to be found in sector S (85.3%);
- o companies engaged in cross border sales to other EU countries (95.3%), those engaged in online and cross-border sales (97.2%), and particularly those engaged in online sales to other EU countries (97.8%);
- o companies that are confident to sell online (97.2%). Those that are not confident are less likely to be planning to continue online sales (50.9%);
- o companies selling in three (95.9%), or four or more languages (96.2%).

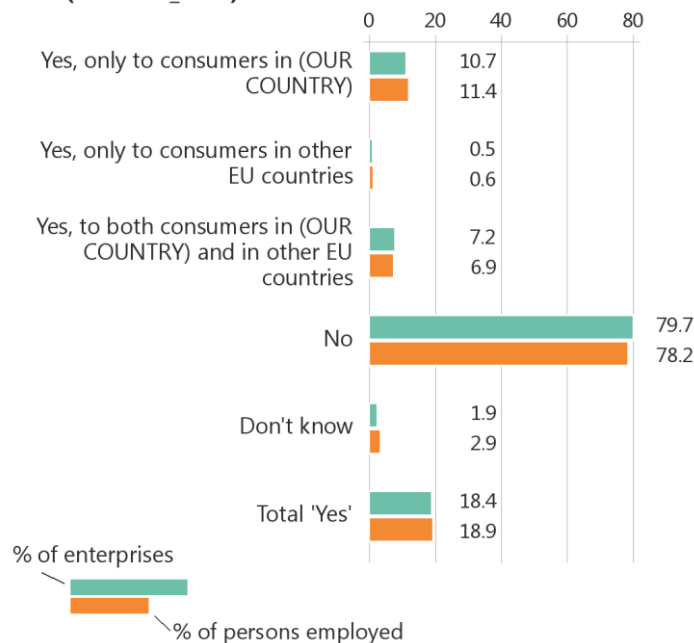
- Less than one in five retailers currently not selling online would be interested in starting to do so in the next 12 months -

Retailers that do not currently sell online were asked whether they would be interested in doing so in the next 12 months. Almost one in five (18.4%) retailers in EU27_2019 say they would be: 10.7% would be interested in selling online only to consumers in their country, while 7.2% would be interested in selling online to consumers in their own and in other EU countries. Less than one in one hundred retailers (0.5%) would be interested in selling online only to consumers in other EU countries.

However, the majority of retailers in EU27_2019 that don't currently sell online would not be interested in doing so in the next 12 months (79.7%), representing 78.2% of the total persons employed by this group of retailers.

Q1a Would your company be interested in selling online in the next 12 months?

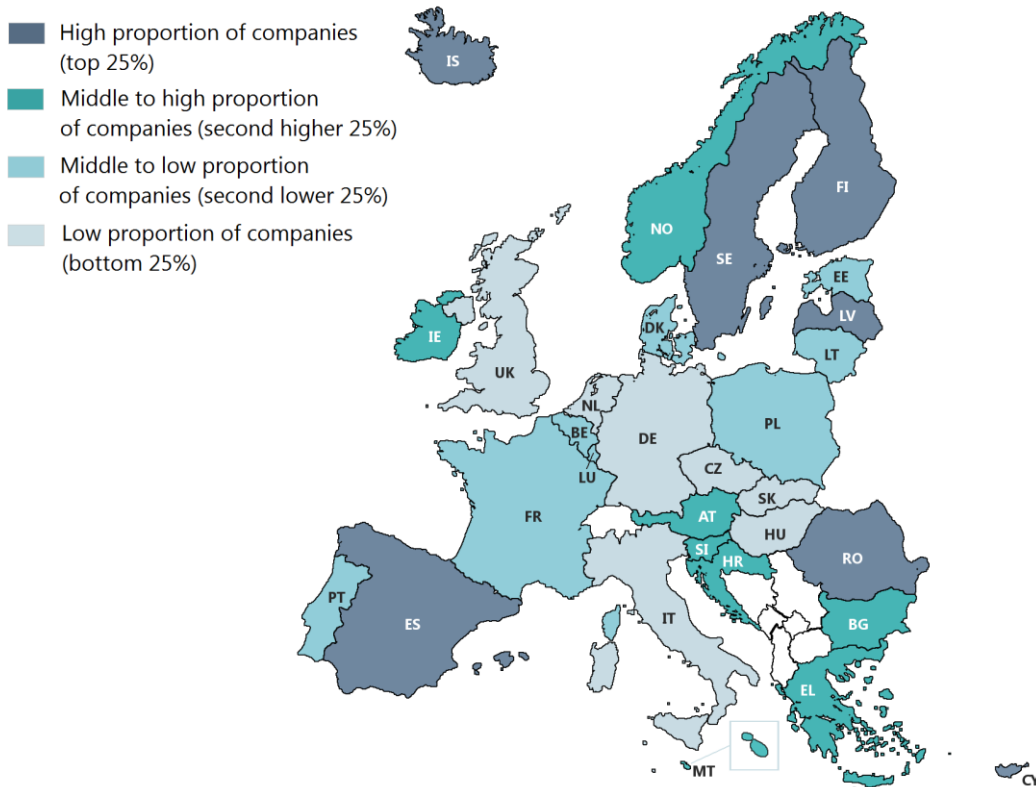
(% - EU27_2019)



Base: All retailers in EU27_2019 currently not selling online (N=5971)

This group of retailers in the northern (27.2%) and eastern (23.4%) regions are more likely to be **interested in selling online in the next 12 months**, while those in the western region are less likely to be interested (15.0%) compared to EU27_2019 as a whole.

Q1a Would your company be interested in selling online in the next 12 months?
(% - TOTAL 'YES')



Base: All retailers currently not selling online (N=6513)

In all countries, only a minority of the retailers that don't currently sell online would be interested in doing so in the next 12 months. At least one third in Romania (35.0%), Cyprus (33.8%), Latvia (33.7%) and Spain (33.6%) in EU27_2019, as well as 41.8% in Ireland say they would be interested, compared to 9.5% in Italy, 10.7% in Germany and 14.9% in the Czech Republic.

Looking at the results in more detail shows companies in Romania (26.3%), Finland (23.4%) and Denmark (22.5%) in EU27_2019, as well as those in Iceland (25.3%) are the most likely to be interested in selling online only to **consumers in their own country**. At the other end of the scale, companies in Italy (5.6%), Germany (5.7%) and Portugal (7.6%) are the least likely to be interested.

Companies in Spain (18.1%), Slovenia (15.1%) and Greece (14.4%) in EU27_2019, as well as those in Iceland (16.5%) are the most likely to be interested in selling online to **consumers in their own and other EU countries**. This compares to 2.1% in Denmark, 2.6% in Estonia and 3.9% in Italy.

Retailers in Malta (4.2%) and Romania (2.3%) are the most likely to be interested in selling online only to **consumers in other EU countries**.

Across EU27_2019, there has been a decrease of 4.2 pp in the proportion of this group of retailers that would be interested in selling online in the next 12 months. Specifically, there have been declines in the proportion of retailers that would be interested in selling online **only to consumers in their country** (-2.6 pp), or **to domestic consumers and those in other EU countries** (-1.8 pp) since the last wave in 2016.

At a country level, retailers in Spain (+11.8 pp) are now more likely to be interested in selling online in the next 12 months. Those in Italy (-18.1 pp) are now less likely to be interested.

Retailers in Romania (+10.9 pp) recorded an increase in the proportion that would be interested in selling online **only to consumers in their country**, while those in Greece (-9.7 pp) recorded the largest decline.

Compared to the previous survey, the biggest increase in the proportion of companies that would be interested in selling online to **consumers in their own and in other EU countries** can be observed amongst retailers in Spain (+7.4 pp), and the largest decline is observed amongst those in Italy (-15.5 pp).

EUROPEAN COMMISSION

Q1a Would your company be interested in selling online in the next 12 months?
(%)

		Yes, only to consumers in (OUR COUNTRY)			Yes, only to consumers in other EU countries			Yes, to both consumers in (OUR COUNTRY) and in other EU countries			No			Don't know			Total 'Yes'		
		2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014
		EU27_2019	10.7	▼2.6	▼1.9	0.5	▲0.2	=	7.2	▼1.8	▼1.2	79.7	▲4.9	▲2.9	1.9	▼0.7	▲0.2	18.4	▼4.2
EU28	10.5	▼2.3	▼2.6	0.5	=	▲0.1	7.4	▼0.7	▼1.6	79.1	▲3.5	▲4.2	2.5	▼0.5	▼0.1	18.4	▼3.0	▼4.1	
REGION NORTH	20.3	▲2.2	▼2.4	0.2	=	=	6.7	▼1.5	▲0.3	70.7	▼0.3	▲1.9	2.1	▼0.4	▲0.2	27.2	▲0.7	▼2.1	
REGION SOUTH	9.1	▼1.3	▼7.4	0.4	▲0.1	▼0.1	9.4	▼5.6	▼0.8	77.9	▲6.4	▲8.5	3.2	▲0.4	▼0.2	18.9	▼6.8	▼8.3	
REGION EAST	16.0	▲2.7	▼3.0	0.9	▲0.4	=	6.5	▼3.1	▲2.3	74.3	▲1.0	=	2.3	▼1.0	▲0.7	23.4	=	▼0.7	
REGION WEST	8.1	▼5.7	▲1.6	0.5	▲0.3	=	6.4	▲0.4	▼2.3	84.0	▲6.3	▲0.3	1.0	▼1.3	▲0.4	15.0	▼5.0	▼0.7	
BE	12.4	▲2.8	▼2.3	0.4	=	▼0.1	10.2	▲1.5	▲1.1	75.8	▼3.8	▲0.2	1.2	▼0.5	▲1.1	23.0	▲4.3	▼1.3	
BG	15.3	▲1.0	▼5.3	0.8	▲0.3	▼0.2	9.8	▼2.8	▲1.6	71.7	▲1.7	▲4.7	2.4	▼0.2	▼0.8	25.9	▼1.5	▼3.9	
CZ	9.3	▲4.5	▼1.7	0.4	=	▲0.4	5.2	▲1.8	▼3.1	82.4	▼3.2	▲0.5	2.7	▼3.1	▲3.9	14.9	▲6.3	▼4.4	
DK	22.5	▲6.5	▼2.6	0.0	=	▼0.6	2.1	▼5.1	▲2.4	72	▼1.5	▼0.7	3.4	▲0.1	▲1.5	24.6	▲1.4	▼0.8	
DE	5.7	▼7.7	▲3.2	0.4	▲0.2	▲0.2	4.6	▲1.2	▼3.7	88.7	▲8.5	▼0.4	0.6	▼2.2	▲0.7	10.7	▼6.3	▼0.3	
EE	16.5	▲4.7	▼13.1	0.0	▼0.4	▲0.1	2.6	▼2.7	▼8.0	75.5	▼3.2	▲19.8	5.4	▲1.6	▲1.2	19.1	▲1.6	▼21.0	
IE	11.8	▼7.8	▲3.4	0.5	▲0.5	=	13.8	▲1.6	▲1.3	67.4	▲5.3	▼6.8	6.5	▲0.4	▲2.1	26.1	▼5.7	▲4.7	
EL	12.9	▼9.7	▼5.8	1.8	▲1.3	▼0.9	14.4	▼5.0	▲2.0	67.2	▲13.8	▲1.3	3.7	▼0.4	▲3.4	29.1	▼13.4	▼4.7	
ES	14.8	▲3.7	▼7.9	0.7	▲0.7	▼0.8	18.1	▼7.4	▼8.5	65.9	▼11.3	▲17.7	0.5	▼0.5	▼1.0	33.6	▲11.8	▼17.2	
FR	13.3	▼2.1	▲0.2	0.9	▲0.9	▼0.6	9.7	▲0.5	▲0.9	75.0	▲0.5	▲0.5	1.1	▲0.2	▼1.0	23.9	▼0.7	▼0.5	
HR	14.6	▼0.1	▲0.1	1.1	▲1.1	▼1.5	14.0	▼1.9	▼1.0	67.7	▲3.2	▲0.9	2.6	▼2.3	▲1.5	29.7	▼0.9	▼2.4	
IT	5.6	▼2.0	▼9.2	0.0	▼0.6	▲0.5	3.9	▼15.5	▲3.7	86.2	▲17.1	▲5.7	4.3	▲1.0	▼0.7	9.5	▼18.1	▼5.0	
CY	21.4	▼5.6	▲7.1	2.0	▲2.0	=	10.4	▲2.7	▼1.9	66.2	▲3.6	▲9.0	0.0	▼2.7	▼14.2	33.8	▼0.9	▲5.2	
LV	20.9	▲3.7	▼9.0	0.9	▲0.2	▲0.4	11.9	▼3.8	▲1.3	63.9	▼0.3	▲7.7	2.4	▲0.2	▼0.4	33.7	▲0.1	▼7.3	
LT	13.4	▼1.6	▲4.3	0.5	▼0.1	▲0.6	4.8	▼4.1	▲0.4	79.5	▲7.0	▼2.2	1.8	▼1.2	▼3.1	18.7	▼5.8	▲5.3	
LU	9.5	▲3.5	▼2.1	1.4	▲0.8	▼0.8	12.8	▲2.0	▼3.1	74.5	▼6.8	▲6.5	1.8	▲0.5	▼0.5	23.7	▲6.3	▼6.0	
HU	11.0	▲0.3	▼5.3	1.0	▲0.2	▲0.8	4.2	▼2.9	▼3.7	79.4	▲3.1	▼2.7	4.4	▼0.7	▲3.5	16.2	▼2.4	▼0.8	
MT	17.2	▼5.5	▲0.5	4.2	▲2.3	▼2.3	8.4	▼5.8	▼8.6	59.9	▲5.0	▲4.5	10.3	▲4.0	▲5.9	29.8	▼9.0	▼10.4	
NL	11.1	▼7.5	▼2.8	0.2	▲0.2	=	5.6	▼3.7	▼2.9	81.7	▲10.9	▲5.3	1.4	▲0.1	▲0.4	16.9	▼11.0	▼5.7	
AT	13.7	▲6.9	▼0.4	0.0	▼0.8	▼0.1	12.3	▲2.7	▲1.9	72.0	▼10.2	▼1.7	2.0	▲1.4	▲0.3	26.0	▲8.8	▲1.4	
PL	15.9	▼1.6	▼3.7	0.0	▼0.4	▼0.1	5.5	▼4.2	▲2.9	77.1	▲5.9	▲1.3	1.5	▲0.3	▼0.4	21.4	▼6.2	▼0.9	
PT	7.6	▼2.5	▲2.2	0.4	=	▲0.3	10.8	▼1.1	▼0.2	77.3	▲5.9	▼4.5	3.9	▼2.3	▲2.2	18.8	▼3.6	▲2.3	
RO	26.3	▲10.9	▼1.9	2	▲2.0	▼0.1	6.4	▼6.6	▲5.8	63.0	▼4.6	▼3.6	2.0	▼1.7	▼0.2	35	▲6.3	▲3.8	
SI	13.9	▲2.3	▼2.4	0.8	▼0.6	▲0.3	15.1	▲3.4	▲4.7	68.8	▼4.5	▲1.3	1.4	▼0.6	▼3.9	29.8	▲5.1	▲2.6	
SK	10.2	▲1.3	▼5.0	0.7	=	▼0.6	4.1	▼1.0	▼3.0	84.1	▲1.8	▲6.9	0.9	▼2.1	▲1.7	15.0	▲0.3	▼8.6	
FI	23.4	▼4.4	▲2.4	0.0	=	=	8.5	▲2.5	▼2.4	66.5	▲1.5	▼0.1	1.6	▲0.4	▲0.1	31.9	▼1.9	=	
SE	21.7	▲3.6	▼4.6	0.0	=	=	8.2	▲1.5	=	69.0	▼3.9	▲3.6	1.1	▼1.2	▲1.0	29.9	▲5.1	▼4.6	
IS	25.3	▲10.2	▼11.3	0.0	=	▼2.0	16.5	▲1.5	▼12.2	58.2	▼7.5	▲0.1	0.0	▼4.2	▲1.0	41.8	▲11.7	▼1.1	
NO	21.6	▲2.8	▼2.6	0.0	=	=	5.5	▲0.6	▲1.1	70.9	▲1.3	▲1.0	2.0	▼4.7	▲0.5	27.1	▲3.4	▼1.5	
UK	9.1	▼1.1	▼6.4	0.6	▼0.8	▲1.3	8.4	▲4.3	▼2.5	76.1	▼3.5	▲11.5	5.8	▲1.1	▼3.9	18.1	▲2.4	▼7.6	

Results statistically significantly higher than EU results (T-test at 95% level)
Results statistically significantly lower than EU results (T-test at 95% level)
Statistically significant increase from one year to the other (T-test at 95% level)
Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers currently not selling online (N=6513)

The analysis of company characteristics highlights retailers **interested in selling online in the next 12 months** are more likely to:

- o be in the trade sector (NACE G) (22.7%), and less likely to be in the services sector (15.8%), and particularly in sectors N (10.5%), H (15.2%) or I (16.2%);
- o have been established in 1990 or earlier: 21.1%;
- o be engaged in distance sales (27.0%) or be engaged in cross-border sales to other EU countries (27.1%);
- o be confident to sell online: 47.8%;
- o sell non-food products (22.5%) – they are less likely to sell food products (15.8%);
- o sell in two (21.5%) or three languages (25.2%). They are less likely to sell only in their country's language (16.5%).

4.2. Drivers of, and barriers to e-commerce

All retailers - irrespective of whether or not they currently sell online - were asked how confident they are to sell online. They were also asked to evaluate the importance of specific obstacles to developing online sales.

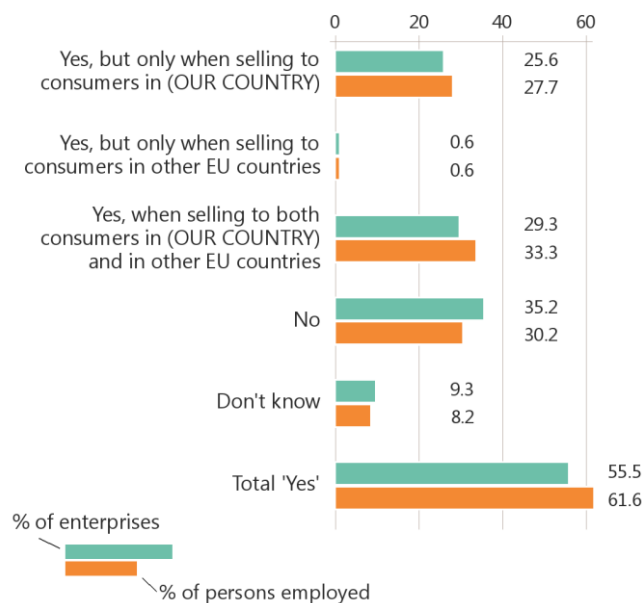
a) Confidence to sell online, domestically and cross-border

- More than half of all retailers are confident to sell online -

Retailers were asked if their company was confident to sell online – most in EU27_2019 (55.5%) say they are. This represents 61.6% of total persons employed.

Just over one quarter of retailers in EU27_2019 are confident **only when selling to consumers in their country** (25.6%), while slightly more are confident to sell to consumers **in their own or in other EU countries** (29.3%). Less than one company in a hundred say they are only confident when selling to consumers in other EU countries (0.6%). Finally, just over one third (35.2%) say they are not confident to sell online.

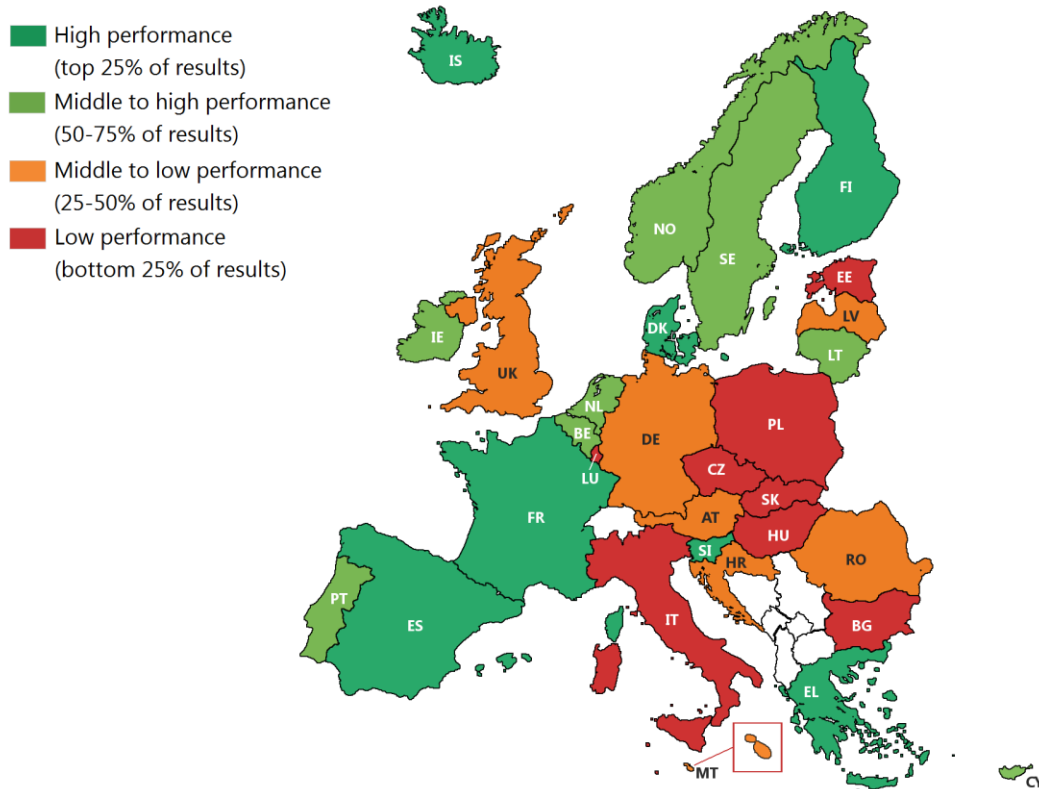
Q2 Would you say that your company is confident to sell online?
(% - EU27_2019)



Base: All retailers in EU27_2019 (N=9796)

Retailers in the northern region (64.9%) are more likely to be confident to sell online, while those in the east (43.6%) are less likely to say they are confident, compared to EU27_2019 overall.

Q2 Would you say that your company is confident to sell online?
(% - TOTAL 'YES')



Base: All retailers (N=10747)

In 19 countries, the majority of retailers say they are confident to sell online. Retailers in Slovenia (79.6%), Spain (74.5%) and Greece (73.7%) in EU27_2019, as well as those in Iceland (76.6%) are the most likely to be confident, while those in Hungary (25.9%), Estonia (31.8%) and Slovakia (37.9%) are the least likely to be so.

Looking at the results in more detail shows companies in Finland (50.6%), Denmark (41.2%) and the Netherlands (36.6%) are the most likely to be confident to sell online **only to consumers in their country**, while those in Luxembourg (7.3%), Hungary (13.6%) and Estonia (16.8%) are the least likely to say this.

There are only two countries where at least half of all retailers are confident to sell online to **consumers in their own and in other EU countries**: Slovenia (61.8%) and Greece (50.1%), compared to 10.8% in Hungary, 11.8% in Slovakia and 14.4% in Estonia.

Companies in Greece (4.4%) and Cyprus (3.8%) in EU27_2019, as well as those in Iceland (4.5%) are the most likely to say that their company is confident, but only when selling online to **consumers in other EU countries**.

Since 2016, retailers in EU27_2019 have become less likely to say they are **confident** to sell online (-3.5 pp), and in particular when selling only to consumers in their own country (-4.1 pp) or only to those in other EU countries (-0.3 pp). Confidence in selling to **consumers in their country and in other EU countries** has not changed.

At a country level, the largest increase since 2016 in the proportion of companies that are **confident** to sell online is observed amongst retailers in Denmark (+12.5 pp), while the biggest decrease is observed amongst those in Italy (-23.1 pp).

The largest increase in the proportion of retailers that say their company is **confident, but only when selling to consumers in their country** is recorded amongst retailers in Romania (+9.8 pp), while the highest decrease is recorded amongst retailers in France (-10.4 pp).

Compared to the previous wave, the biggest decrease in the proportion of companies that say that their company is confident **only when selling online to consumers in other EU countries** is observed amongst retailers in Malta (-6.5 pp).

Compared to the previous survey, the largest increase in the proportion of companies that are confident **when selling to consumers in their country and in other EU countries** is seen in Sweden (+12.0 pp). In contrast, the largest decrease is observed amongst retailers in Italy (-21.4 pp).

EUROPEAN COMMISSION

Q2 Would you say that your company is confident to sell online? (%)

	Yes, but only when selling to consumers in (OUR COUNTRY)			Yes, but only when selling to consumers in other EU countries			Yes, when selling to both consumers in (OUR COUNTRY) and in other EU countries			No			Don't know			Total 'Yes'		
	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014	2018	2018-2016	2016-2014
EU27_2019	25.6	▼ 4.1	▲ 1.4	0.6	▼ 0.3	▲ 0.2	29.3	▲ 0.9	▼ 1.5	35.2	▲ 1.2	▲ 2.3	9.3	▲ 2.3	▼ 2.4	55.5	▼ 3.5	▲ 0.1
EU28	26.1	▼ 3.9	▲ 0.7	0.7	▼ 0.1	▲ 0.2	28.7	▲ 1.5	▼ 1.7	35.8	▲ 1.2	▲ 2.7	8.7	▲ 1.3	▼ 1.9	55.5	▼ 2.5	▼ 0.8
REGION NORTH	36.8	▲ 1.3	▼ 1.8	0.5	▼ 0.3	▲ 0.6	27.6	▲ 1.7	▲ 4.3	24.2	▲ 1.0	▲ 2.3	10.9	▼ 3.7	▼ 5.4	64.9	▲ 2.7	▲ 3.1
REGION SOUTH	23.0	▼ 1.2	▼ 0.7	1.0	=	▼ 0.1	33.8	▼ 8.9	▲ 1.7	24.2	▲ 0.6	▲ 0.7	18.0	▲ 9.5	▼ 1.6	57.8	▼ 10.1	▲ 0.9
REGION EAST	24.3	▼ 0.2	▼ 1.8	1.2	▲ 0.4	▼ 0.1	18.1	▼ 2.1	▲ 3.1	46.4	▲ 1.3	▲ 1.2	10.0	▲ 0.6	▼ 2.4	43.6	▼ 1.9	▲ 1.2
REGION WEST	25.6	▼ 7.5	▲ 3.4	0.3	▼ 0.5	▲ 0.4	30.7	▲ 5.5	▼ 3.8	38.5	▲ 2.0	▲ 1.7	4.9	▲ 0.5	▼ 1.7	56.6	▼ 2.5	=
BE	25.7	▲ 2.6	▼ 2.4	0.8	▲ 0.2	▼ 0.4	37.3	▼ 4.2	▲ 3.9	31.3	▲ 1.3	▼ 2.3	4.9	▲ 0.1	▲ 1.2	63.8	▼ 1.4	▲ 1.1
BG	20.5	▼ 0.3	▼ 4.4	2.4	▲ 0.3	▲ 1.4	16.4	▼ 1.5	▲ 8.7	51.6	▲ 5.1	▼ 6.0	9.1	▼ 3.6	▲ 0.3	39.3	▼ 1.5	▲ 5.7
CZ	18.6	▼ 2.6	▼ 1.6	0.9	▲ 0.6	▼ 0.2	19.5	▲ 0.4	▼ 0.8	54.5	▲ 7.0	▼ 1.2	6.5	▼ 5.4	▲ 3.8	39	▼ 1.6	▼ 2.6
DK	41.2	▲ 7.5	▼ 10.5	0.7	▼ 0.3	▲ 1.0	28.3	▲ 5.3	▲ 7.1	18.5	▼ 3.5	▲ 1.9	11.3	▼ 9.0	▲ 0.5	70.2	▲ 12.5	▼ 2.4
DE	23.8	▼ 9.3	▲ 7.3	0.2	▼ 0.8	▲ 0.5	26.8	▼ 7.4	▼ 6.0	44.0	▲ 2.6	▲ 0.4	5.2	▲ 0.1	▼ 2.2	50.8	▼ 2.7	▲ 1.8
EE	16.8	▼ 0.8	▼ 6.8	0.6	▲ 0.2	▲ 0.2	14.4	▼ 2.1	▲ 1.9	53.2	▲ 18.3	▲ 2.3	15.0	▼ 15.6	▲ 2.4	31.8	▼ 2.7	▼ 4.7
IE	26.5	▼ 2.6	▲ 0.4	1.0	▲ 0.7	▼ 0.7	36.3	▼ 1.9	▲ 2.2	31.0	▲ 5.5	▼ 2.5	5.2	▼ 1.7	▲ 0.6	63.8	▼ 3.8	▲ 1.9
EL	19.2	▼ 3.8	▼ 3.5	4.4	▲ 1.7	▲ 2.1	50.1	▼ 4.5	▲ 9.1	20.6	▲ 3.6	▼ 7.8	5.7	▲ 3.0	▲ 0.1	73.7	▼ 6.6	▲ 7.7
ES	30.0	▲ 0.9	▲ 0.6	1.1	▲ 0.4	▼ 0.1	43.4	▲ 0.1	▼ 7.2	14.3	▼ 3.4	▲ 3.4	11.2	▲ 2.0	▲ 3.3	74.5	▲ 1.4	▼ 6.7
FR	30.4	▼ 10.4	▲ 1.0	0.0	▼ 0.3	=	41.3	▲ 8.6	▲ 0.3	24.2	▲ 0.6	▲ 1.4	4.1	▲ 1.5	▼ 2.7	71.7	▼ 2.1	▲ 1.3
HR	22.7	▼ 2.6	▲ 7.5	0.8	▼ 1.7	▲ 0.5	35.6	▼ 4.2	▼ 1.6	32.5	▲ 8.7	▼ 9.8	8.4	▼ 0.2	▲ 3.4	59.1	▼ 8.5	▲ 6.4
IT	18	▼ 1.1	▼ 1.5	0.0	▼ 0.6	▼ 0.7	21.0	▼ 21.4	▲ 12.1	32.6	▲ 3.2	▼ 3.2	28.4	▼ 19.9	▼ 6.7	39.0	▼ 23.1	▲ 9.9
CY	28.8	▼ 1.4	▲ 6.3	3.8	▲ 1.2	▲ 1.3	35.5	▲ 7.6	▲ 5.2	24.1	▼ 11.3	▲ 5.6	7.8	▲ 3.9	▼ 18.4	68.1	▲ 7.4	▲ 12.8
LV	34.9	▲ 3.5	▼ 8.5	0.4	▼ 1.3	▲ 1.3	21.4	▼ 1.6	▲ 2.1	30.7	▼ 5.2	▲ 7.7	12.6	▲ 4.6	▼ 2.6	56.7	▲ 0.6	▼ 5.1
LT	29.1	▲ 8.0	▼ 7.2	0.5	▼ 0.5	▲ 0.3	34.6	▼ 16.1	▲ 10.2	20.9	▲ 6.5	▼ 6.5	14.9	▲ 2.1	▼ 11.2	64.2	▼ 8.6	▲ 17.7
LU	7.3	▼ 9.2	▲ 1.5	0.0	▼ 2.8	▲ 1.0	36.0	▼ 5.8	▲ 13.5	44.8	▲ 10.1	▼ 12.1	11.9	▲ 7.7	▼ 3.9	43.3	▼ 17.8	▲ 16.0
HU	13.6	▼ 5.0	▼ 3.1	1.5	▲ 0.3	▲ 0.8	10.8	▼ 1.7	▲ 3.2	66.1	▲ 7.6	▼ 0.1	8.0	▼ 1.2	▼ 0.8	25.9	▼ 6.4	▲ 0.9
MT	24.3	▲ 0.9	▼ 3.1	1.9	▼ 6.5	▲ 7.1	24.5	▼ 7.1	▼ 13.8	36.4	▲ 4.9	▲ 8.8	12.9	▲ 7.8	▲ 1.0	50.7	▼ 12.7	▼ 9.8
NL	36.6	▲ 3.4	▼ 2.8	0.1	▼ 0.2	▼ 0.1	26.1	▼ 1.7	▼ 1.8	33.2	▼ 2.8	▲ 4.4	4.0	▲ 1.3	▲ 0.3	62.8	▲ 1.5	▼ 4.7
AT	21.9	▲ 2.1	▲ 1.9	0.7	▼ 1.5	▲ 1.1	36.9	▲ 3.6	▲ 5.1	36.6	▼ 4.2	▼ 5.6	3.9	=	▼ 2.5	59.5	▲ 4.2	▲ 8.1
PL	28.0	▼ 1.9	▲ 0.8	0.5	▲ 0.5	▼ 1.0	15.3	▼ 2.7	▲ 2.2	38.5	▼ 3.8	▲ 10.9	17.7	▲ 7.9	▼ 12.9	43.8	▼ 4.1	▲ 2.0
PT	23.7	▲ 1.0	▲ 2.5	0.9	▼ 0.4	▲ 1.0	39.9	▲ 5.5	▼ 13.0	25.6	▼ 5.5	▲ 8.1	9.9	▼ 0.6	▲ 1.4	64.5	▲ 6.1	▼ 9.5
RO	33.8	▲ 9.8	▼ 5.4	1.1	▲ 0.1	▲ 0.5	18.9	▼ 4.5	▲ 3.1	41.6	▼ 5.4	▲ 0.7	4.6	=	▲ 1.1	53.8	▲ 5.4	▼ 1.8
SI	17.2	▼ 1.8	▼ 2.7	0.6	▲ 0.1	▼ 2.7	61.8	▲ 7.9	▼ 30.3	13.5	▼ 3.8	▼ 17.7	6.9	▼ 2.4	▼ 7.2	79.6	▲ 6.2	▲ 24.9
SK	23.6	▼ 9.0	▼ 2.7	2.5	▲ 1.1	▼ 1.3	11.8	▲ 1.9	▲ 1.6	48.3	▲ 0.8	▲ 3.7	13.8	▲ 5.2	▼ 1.3	37.9	▼ 6.0	▼ 2.4
FI	50.6	▼ 2.5	▲ 3.3	0.9	▲ 0.6	=	19.3	▼ 0.8	▲ 1.8	24.8	▲ 0.9	▲ 1.1	4.4	▲ 1.8	▼ 2.6	70.8	▼ 2.7	▲ 1.5
SE	34.3	▼ 6.4	▲ 3.1	0.1	▼ 0.4	▲ 0.4	32.9	▲ 12.0	▲ 2.8	21.6	▲ 0.6	▲ 6.0	11.1	▼ 5.8	▼ 12.3	67.3	▲ 5.2	▲ 6.3
IS	32.0	▼ 7.1	▲ 6.9	4.5	▲ 3.0	▼ 0.3	40.1	▲ 11.2	▼ 10.0	22.5	▼ 7.2	▲ 4.0	0.9	▲ 0.1	▼ 0.6	76.6	▲ 7.1	▼ 3.4
NO	39.1	▲ 1.4	▼ 5.9	0.0	▼ 0.2	▲ 0.2	21.7	▲ 8.5	▼ 3.1	27.8	▼ 9.3	▲ 3.7	11.4	▼ 0.4	▲ 5.1	60.8	▲ 9.7	▼ 8.8
UK	29.3	▼ 2.1	▼ 4.2	1.1	▲ 0.6	▲ 0.4	25.4	▲ 5.0	▼ 2.0	39.4	▲ 1.5	▲ 4.8	4.8	▼ 5.0	▲ 1.0	55.8	▲ 3.5	▼ 5.8

Results statistically significantly higher than EU results (T-test at 95% level)
Results statistically significantly lower than EU results (T-test at 95% level)
Statistically significant increase from one year to the other (T-test at 95% level)
Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

The **analysis of company characteristics** shows higher proportions of retailers that are confident to sell online in the following subgroups:

- o retailers belonging to sector I (61.9%). Retailers in sector H (44.2%) or S (35.9%) are less likely to be confident;
- o medium (62.3%) or large companies (72.4%);
- o companies engaged in distance sales (78.6%) and those that sell cross-border to other EU countries (73.2%);
- o companies selling online (89.0%), and those selling online to other EU countries (96.2%);
- o companies interested in selling online in the next 12 months (82.3%), or planning to continue selling online in the next 12 months (94.3%);
- o companies selling non-food products (59.3%). Those selling food products are less likely to be confident (52.2%);
- o companies selling in two (62.1%), three (66.0%) or four or more (66.6%) languages;
- o companies where the respondent is a marketing manager (63.4%).

b) **Obstacles to the development of online sales:**

- o Obstacles to developing online sales to the other EU Member States amongst retailers currently selling online

Retailers that currently sell online were asked to evaluate the importance of a number of possible obstacles to the development of their online sales to other EU Member States.

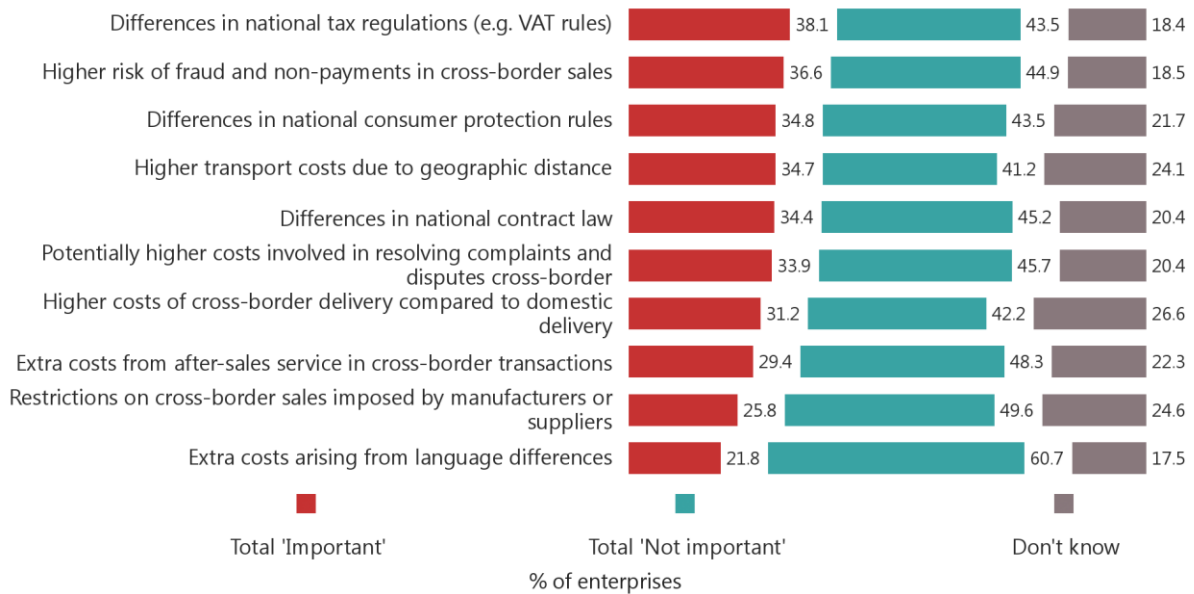
- Differences in tax regulations and the higher risk of fraud and non-payment are the most mentioned barriers to developing online sales to other EU countries -

Almost four in ten retailers in EU27_2019 that currently sell online mention **differences in national tax regulations** (38.1%), while almost as many (36.6%) mention the **higher risk of fraud and non-payments** as important obstacles to the development of online sales to other EU countries. Around one in five companies say each of these obstacles are very important.

More than one third of companies (34.8%) mention **differences in national consumer protection rules**, while 34.7% mention **higher transport costs**, 34.4% mention **differences in national contract law** and 33.9% the **potentially higher costs involved in resolving complaints and disputes** as important obstacles to the development of online sales to other EU countries.

Just over three in ten companies (31.2%) say the **higher costs of cross-border delivery** cross-border are an important obstacle, while 29.4% mention **extra costs from after-sales service in cross-border transactions** and 25.8% mention **restrictions on cross-border sales imposed by manufacturers or suppliers**. Just over one in ten (21.8%) say **extra costs arising from language differences** are an important obstacle.

Q3a How important are the following obstacles to the development of online sales to other EU countries by your company?
(% - EU27_2019)



Base: All retailers in EU27_2019 currently selling online (N=3825)

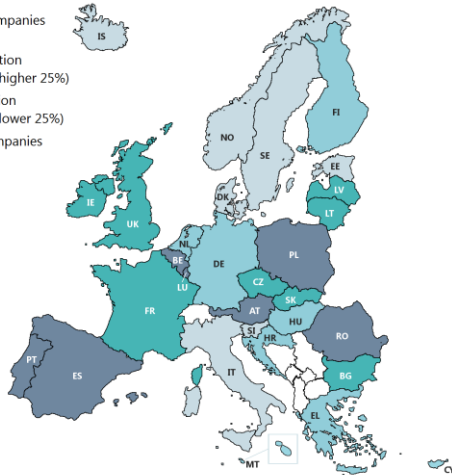
Amongst companies that **currently sell online**, retailers in the eastern and southern region are more likely to say each of these issues are important obstacles to the development of online sales to other EU countries, compared to EU27_2019 overall. Retailers in the southern region are also more likely to mention each obstacle, with the exception of **the higher risk of fraud and non-payments**. Retailers in the north are less likely to consider each of these issues to be important obstacles to the development of online sales to other EU countries, with the exception of **higher transport costs due to geographic distance**, compared to all retailers in EU27_2019.

Finally, companies in the western region are less likely to consider each of these issues as important obstacles, with the exception of higher transport costs due to geographic differences, than those in EU27_2019 as a whole.

Q3a.3 How important are the following obstacles to the development of online sales to other EU countries by your company?

Differences in national contract law
(% - TOTAL 'IMPORTANT')

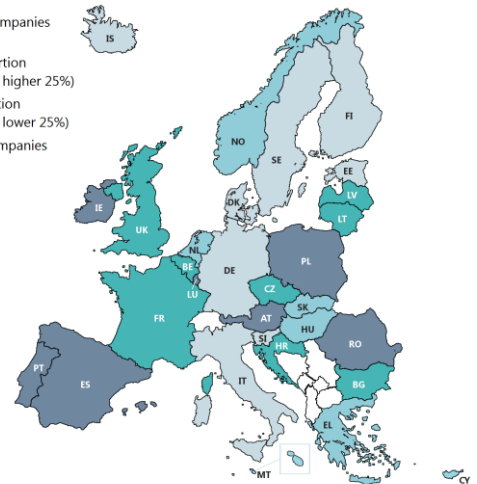
- High proportion of companies (top 25%)
- Middle to high proportion of companies (second higher 25%)
- Middle to low proportion of companies (second lower 25%)
- Low proportion of companies (bottom 25%)



Q3a.2 How important are the following obstacles to the development of online sales to other EU countries by your company?

Differences in national consumer protection rules
(% - TOTAL 'IMPORTANT')

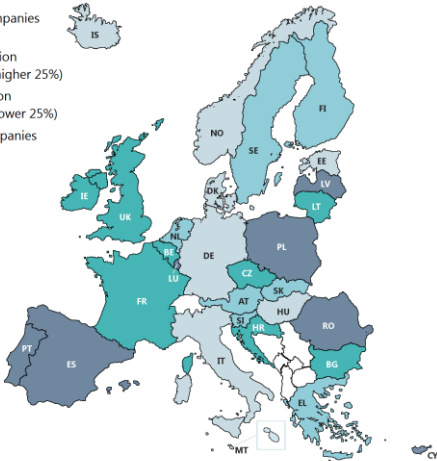
- High proportion of companies (top 25%)
- Middle to high proportion of companies (second higher 25%)
- Middle to low proportion of companies (second lower 25%)
- Low proportion of companies (bottom 25%)



Q3a.4 How important are the following obstacles to the development of online sales to other EU countries by your company?

Higher costs of cross-border delivery compared to domestic delivery
(% - TOTAL 'IMPORTANT')

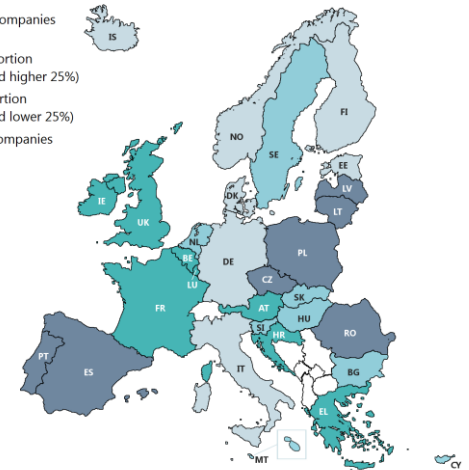
- High proportion of companies (top 25%)
- Middle to high proportion of companies (second higher 25%)
- Middle to low proportion of companies (second lower 25%)
- Low proportion of companies (bottom 25%)



Q3a.8 How important are the following obstacles to the development of online sales to other EU countries by your company?

Extra costs from after-sales service in cross-border transactions
(% - TOTAL 'IMPORTANT')

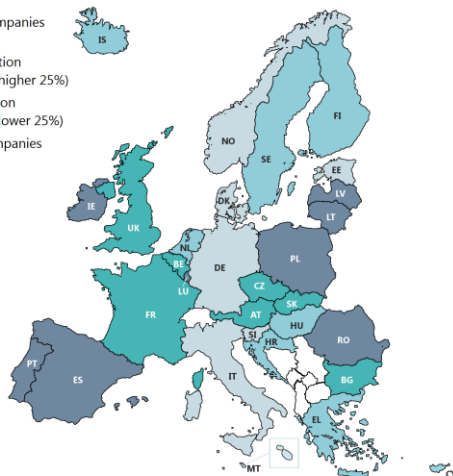
- High proportion of companies (top 25%)
- Middle to high proportion of companies (second higher 25%)
- Middle to low proportion of companies (second lower 25%)
- Low proportion of companies (bottom 25%)



Q3a.9 How important are the following obstacles to the development of online sales to other EU countries by your company?

Restrictions on cross-border sales imposed by manufacturers or suppliers
(% - TOTAL 'IMPORTANT')

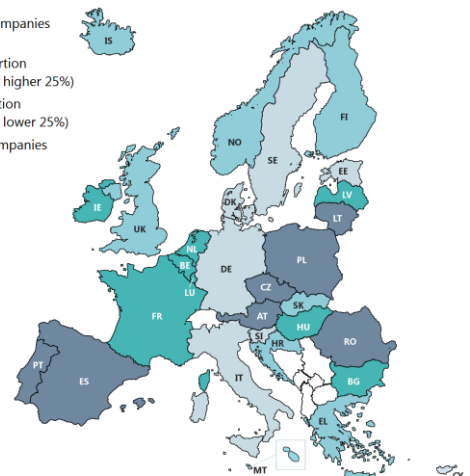
- High proportion of companies (top 25%)
- Middle to high proportion of companies (second higher 25%)
- Middle to low proportion of companies (second lower 25%)
- Low proportion of companies (bottom 25%)



Q3a.7 How important are the following obstacles to the development of online sales to other EU countries by your company?

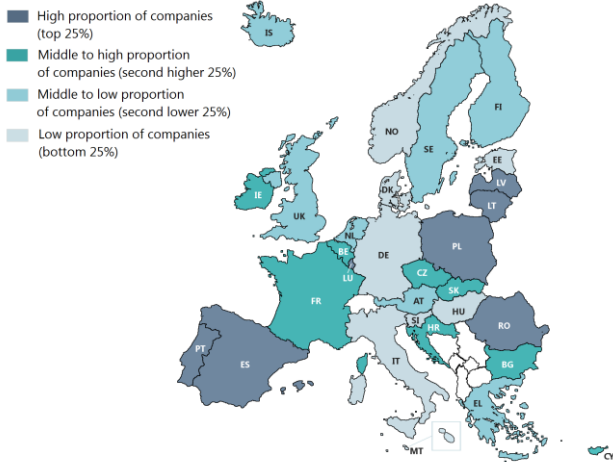
Extra costs arising from language differences
(% - TOTAL 'IMPORTANT')

- High proportion of companies (top 25%)
- Middle to high proportion of companies (second higher 25%)
- Middle to low proportion of companies (second lower 25%)
- Low proportion of companies (bottom 25%)

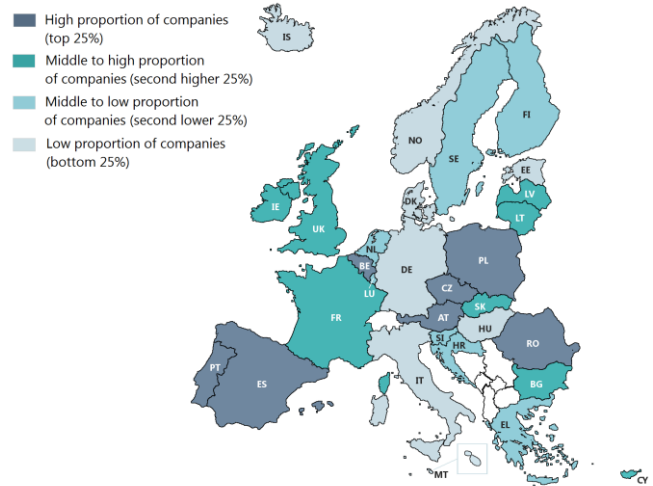


Base: All retailers currently selling online (N=4234)

Q3a.10 How important are the following obstacles to the development of online sales to other EU countries by your company?
Higher transport costs due to geographic distance
 (% - TOTAL 'IMPORTANT')



Q3a.5 How important are the following obstacles to the development of online sales to other EU countries by your company?
Potentially higher costs involved in resolving complaints and disputes cross-border
 (% - TOTAL 'IMPORTANT')



Base: All retailers currently selling online (N=4234)

Overall, companies in Portugal, Poland, Romania and Spain are generally amongst the most likely to consider each issue as an important obstacle to the development of online sales to other EU countries, while those in Denmark and Estonia are fairly consistently amongst the least likely to do so.

The following pages present the country level results for each of the obstacles. Please note that due to very low base size results for Cyprus (n=35) and Luxembourg (n=40) will not be included in the discussions. Results for Malta (n=71), Hungary (n=80), the Czech Republic (n=89) and Iceland (n=95) should be interpreted with caution due to low base size.

Companies in Portugal (59.2%), Spain (56.0%) and France (56.2%) are the most likely to say the **higher risk of fraud and non-payments** in cross border sales is an important obstacle, compared to less than one in twenty retailers in Italy (16.7%), Estonia (17.7%) and Denmark (18.4%).

Q3a.6 How important are the following obstacles to the development of online sales to other EU countries by your company?

Higher risk of fraud and non-payments in cross-border sales
(% - TOTAL 'IMPORTANT')

		2018	2018-2016	2016-2014
EU27_2019		36.6	▼ 0.9	▼ 6.9
EU28		38.4	▼ 1.3	▼ 4.8
REGION NORTH		31.4	▼ 1.0	▼ 0.9
REGION SOUTH		41.8	▲ 0.5	▼ 8.0
REGION EAST		45.3	▼ 3.0	▼ 1.0
REGION WEST		33.2	▼ 0.9	▼ 8.1
BE		47.8	▼ 9.8	▲ 10.1
BG		38.4	▼ 13.7	▲ 1.3
CZ		45.7	▲ 14.3	▼ 12.9
DK		18.4	▲ 3.0	▼ 6.5
DE		20.6	▼ 1.2	▼ 11.7
EE		17.7	▼ 3.0	▼ 4.8
IE		54.3	=	▼ 3.0
EL		36.8	▼ 4.9	▼ 10.1
ES		56.0	▲ 3.3	▼ 6.5
FR		56.2	▲ 0.6	▲ 2.4
HR		39.9	▼ 12.8	▲ 0.1
IT		16.7	▼ 1.9	▼ 2.0
CY		52.2	▲ 12.7	▲ 12.0
LV		46.8	▼ 1.1	▼ 7.0
LT		53.5	▲ 4.0	▼ 0.6
LU		56.1	▲ 16.1	▼ 16.3
HU		31.0	▼ 6.5	▼ 2.4
MT		36.1	▼ 15.1	▲ 5.4
NL		36.1	▼ 6.4	▼ 1.8
AT		48.9	▲ 5.1	▲ 13.8
PL		53.5	▼ 4.0	▲ 8.7
PT		59.2	▼ 1.5	▲ 2.0
RO		51.0	▼ 7.7	▼ 2.0
SI		21.4	▼ 16.8	▲ 0.2
SK		39.8	▼ 1.6	▼ 14.3
FI		27.3	▼ 10.1	▲ 0.7
SE		35.0	▲ 4.9	▲ 1.0
IS		25.5	▼ 3.8	▲ 7.6
NO		21.6	▼ 15.0	▲ 2.2
UK		52.2	▼ 4.6	▲ 12.3

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers currently selling online (N=4234)

Companies in Portugal (60.7%), Poland (57.6%) and Romania (54.6%) are the most likely to mention **differences in national tax regulations** as important obstacles to the development of online sales to other EU countries. This obstacle is least mentioned by companies in Estonia (14.2%), Slovenia (20.4%) and Finland (23.3%).

Q3a.1 How important are the following obstacles to the development of online sales to other EU countries by your company?

Differences in national tax regulations (e.g. VAT rules)
(% - TOTAL 'IMPORTANT')

		2018	2018-2016	2016-2014
EU27_2019		38.1	▼ 0.8	▼ 4.7
EU28		39.4	▼ 0.2	▼ 4.1
REGION NORTH		28.4	▼ 3.9	▲ 0.1
REGION SOUTH		44.2	▼ 1.7	▼ 5.8
REGION EAST		45.3	▲ 1.5	▼ 6.7
REGION WEST		35.5	▼ 0.2	▼ 3.9
BE		50.0	▼ 1.9	▲ 9.2
BG		38.1	▲ 0.1	▼ 8.2
CZ		36.4	▲ 11.9	▼ 9.3
DK		26.6	▲ 6.0	▼ 6.8
DE		27.7	▲ 3.1	▼ 3.1
EE		14.2	▲ 1.3	▼ 6.2
IE		47.2	▲ 3.0	▼ 1.2
EL		40.5	▼ 12.7	▲ 7.1
ES		51.7	▲ 1.0	▼ 3.1
FR		48.3	▼ 13.1	▲ 2.4
HR		35.4	▼ 4.1	▼ 8.5
IT		29.8	▼ 2.8	▼ 10.5
CY		36.1	▲ 7.5	▲ 9.3
LV		40.7	▲ 0.4	▼ 18.1
LT		46.6	▼ 5.8	▲ 12.4
LU		55.2	▲ 10.3	▼ 17.3
HU		27.8	▲ 0.9	▼ 8.1
MT		23.3	▼ 21.2	▲ 14.0
NL		34.0	▼ 1.8	▼ 0.4
AT		51.1	▲ 2.8	▲ 17.3
PL		57.6	▲ 0.6	▼ 0.4
PT		60.7	▼ 4.1	▼ 1.4
RO		54.6	▼ 11.9	▼ 12.2
SI		20.4	▼ 25.1	▲ 4.5
SK		39.8	▼ 1.2	▼ 5.7
FI		23.3	▼ 10.9	▼ 1.2
SE		26.9	▼ 3.7	▲ 9.0
IS		36.2	▲ 14.8	▲ 1.0
NO		28.6	▲ 1.9	▼ 7.2
UK		48.7	▲ 3.6	▲ 1.3

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All currently selling online (N=4234)

Poland (66.1%), Portugal (56.3%) and Spain (55.4%) are the only countries where at least half of all retailers who sell online say **differences in national contract law** is an important obstacle to the development of online sales to other EU countries. This compares to 13.4% in Estonia, 19.3% in Slovenia and 19.4% in Italy, and to 17.8% in Norway (outside EU27_2019).

Q3a.3 How important are the following obstacles to the development of online sales to other EU countries by your company?

Differences in national contract law
(% - TOTAL 'IMPORTANT')

		2018	2018-2016	2016-2014
EU27_2019		34.4	▼ 3.5	▼ 3.5
EU28		34.8	▼ 3.3	▼ 2.7
REGION NORTH		25.0	▼ 6.4	▲ 1.6
REGION SOUTH		40.7	▼ 2.0	▼ 5.5
REGION EAST		46.9	▲ 1.5	▼ 0.5
REGION WEST		30.4	▼ 4.6	▼ 3.5
BE		47.7	▼ 1.1	▲ 3.2
BG		39.2	▲ 0.2	▼ 8.1
CZ		43.2	▲ 16.4	▲ 0.7
DK		21.9	▲ 4.5	▼ 4.5
DE		23.8	▼ 1.4	▼ 6.8
EE		13.4	▼ 9.0	▲ 5.1
IE		43.8	▼ 1.3	▼ 0.5
EL		30.3	▼ 9.8	▼ 3.5
ES		55.4	▼ 0.2	▲ 1.5
FR		40.9	▼ 18.5	▲ 10.2
HR		35.4	▲ 0.6	▼ 9.7
IT		19.4	▼ 1.0	▼ 9.6
CY		24.9	▼ 6.1	▲ 12.1
LV		37.0	▼ 5.8	▼ 7.2
LT		37.0	▼ 9.7	▲ 5.0
LU		51.3	▲ 8.5	▼ 11.4
HU		24.1	▼ 2.9	▼ 8.9
MT		25.3	▼ 5.5	▼ 1.3
NL		23.4	▼ 8.6	▼ 0.1
AT		47.0	▲ 4.2	▲ 16.1
PL		66.1	▲ 8.2	▲ 7.7
PT		56.3	▼ 3.0	▲ 3.1
RO		47.5	▼ 25.6	▲ 7.1
SI		19.3	▼ 32.6	▲ 15.2
SK		43.9	▲ 2.4	▼ 15.1
FI		28.2	▼ 13.0	▲ 3.9
SE		21.0	▼ 6.5	▲ 6.1
IS		20.0	▲ 6.1	▼ 3.0
NO		17.8	▼ 10.4	▼ 0.1
UK		37.9	▼ 1.6	▲ 3.8

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers currently selling online (N=4234)

Companies in Portugal (69.1%), Spain (58.0%) and Austria (57.5%) are the most likely to mention **differences in national consumer protection rules**, while those in Estonia (14.2%), Italy (16.8%) and Denmark (17.4%) are the least likely to mention this.

Q3a.2 How important are the following obstacles to the development of online sales to other EU countries by your company?

Differences in national consumer protection rules

(% - TOTAL 'IMPORTANT')

		2018	2018-2016	2016-2014
EU27_2019		34.8	▼ 2.4	▼ 5.3
EU28		36.0	▼ 1.4	▼ 4.9
REGION NORTH		23.4	▼ 4.9	▲ 1.8
REGION SOUTH		42.5	▼ 1.2	▼ 6.3
REGION EAST		46.3	▲ 0.8	▼ 3.7
REGION WEST		30.8	▼ 2.9	▼ 5.6
BE		50.8	▼ 6.2	▲ 10.5
BG		40.9	▼ 1.6	▼ 10.1
CZ		45.5	▲ 16.8	▼ 12.9
DK		17.4	▲ 2.5	▼ 4.3
DE		20.2	▲ 2.8	▼ 11.7
EE		14.2	▼ 2.9	▲ 0.3
IE		53.5	▲ 4.5	▲ 1.8
EL		30.3	▼ 6.9	▼ 6.8
ES		58.0	▲ 4.5	▼ 6.8
FR		44.7	▼ 18.0	▲ 9.2
HR		40.8	▼ 3.3	▼ 6.2
IT		16.8	▼ 11.6	▲ 2.0
CY		38.7	▲ 8.1	▲ 5.1
LV		42.0	▼ 1.7	▼ 4.7
LT		41.1	▼ 2.1	▲ 8.5
LU		53.3	▼ 0.1	▼ 8.0
HU		27.0	▼ 5.4	▲ 3.4
MT		25.5	▼ 10.3	▼ 1.6
NL		31.9	▼ 19.0	▲ 9.5
AT		57.5	▲ 11.2	▲ 20.7
PL		56.7	▲ 0.5	▲ 5.3
PT		69.1	▲ 12.9	▼ 1.1
RO		52.6	▼ 9.2	▼ 7.8
SI		22.0	▼ 23.2	▲ 7.9
SK		37.4	▼ 6.5	▼ 6.5
FI		22.0	▼ 15.2	▲ 8.4
SE		20.9	▼ 3.1	▲ 3.2
IS		21.2	▲ 5.5	▼ 9.7
NO		28.5	▼ 4.5	▲ 6.4
UK		44.4	▲ 5.4	▼ 1.3

































- Results statistically significantly higher than EU results (T-test at 95% level)
- Results statistically significantly lower than EU results (T-test at 95% level)
- Statistically significant increase from one year to the other (T-test at 95% level)
- Statistically significant decrease from one year to the other (T-test at 95% level)





Base: All retailers currently selling online (N=4234)

Higher transport costs due to geographic distance are most likely to be mentioned as an important obstacle by companies in Portugal (57.5%), Romania (50.3%) and Lithuania (49.6%), and least likely to be mentioned by those in Estonia (15.9%), Denmark (21.3%) and Malta (23.9%).

Q3a.10 How important are the following obstacles to the development of online sales to other EU countries by your company?

Higher transport costs due to geographic distance
(% - TOTAL 'IMPORTANT')

	2018	2018-2016	2016-2014
EU27_2019 	34.7	▼ 2.0	▼ 5.8
EU28 	34.4	▼ 2.8	▼ 5.5
REGION NORTH	31.8	▼ 2.5	▼ 3.9
REGION SOUTH	39.4	▼ 4.9	▼ 10.7
REGION EAST	43.0	=	▼ 4.1
REGION WEST	31.4	▼ 1.1	▼ 3.1
BE 	40.5	▼ 4.1	▲ 7.8
BG 	41.3	▼ 1.2	▼ 11.9
CZ 	43.3	▲ 15.9	▼ 15.2
DK 	21.3	▼ 3.4	▼ 11.3
DE 	26.4	▲ 6.6	▼ 7.3
EE 	15.9	▼ 10.0	▼ 0.9
IE 	37.8	▼ 8.1	▲ 2.2
EL 	32.0	▼ 5.7	▼ 13.1
ES 	46.1	▼ 7.9	▼ 9.6
FR 	42.0	▼ 18.6	▲ 11.4
HR 	39.2	▲ 1.7	▼ 1.7
IT 	27.3	▼ 2.8	▼ 4.5
CY 	40.8	▲ 5.3	▲ 8.1
LV 	45.3	▲ 0.1	▼ 9.8
LT 	49.6	▼ 1.1	▼ 2.7
LU 	46.7	▲ 14.3	▼ 15.7
HU 	26.3	▼ 4.5	▼ 2.3
MT 	23.9	▼ 7.7	▼ 3.3
NL 	31.3	▼ 11.6	▲ 11.6
AT 	31.9	▼ 0.9	▲ 8.1
PL 	47.1	▼ 4.0	▼ 2.0
PT 	57.5	▲ 6.3	▼ 9.4
RO 	50.3	▼ 11.7	▲ 8.2
SI 	26.2	▼ 22.7	▲ 6.0
SK 	36.0	▼ 3.0	▼ 5.6
FI 	29.4	▼ 15.3	▲ 8.0
SE 	34.6	▲ 6.6	▼ 0.3
IS 	31.1	▲ 8.2	▼ 10.8
NO 	27.5	▲ 3.3	▼ 8.6
UK 	32.8	▼ 8.7	▼ 2.3

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 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers currently selling online (N=4234)

There are four countries where the majority of these companies say the **potentially higher costs involved in resolving complaints and disputes cross-border** are an important obstacle to the development of online sales: Portugal (60.8%), Poland (53.3%), Spain (51.1%) and Romania (51.2%). At the other end of the scale 15.4% in Estonia, 18.0% in Italy and 18.2% in Denmark say the same.

Q3a.5 How important are the following obstacles to the development of online sales to other EU countries by your company?

Potentially higher costs involved in resolving complaints and disputes cross-border
(% - TOTAL 'IMPORTANT')

		2018	2018-2016	2016-2014
EU27_2019		33.9	▼ 1.9	▼ 3.7
EU28		34.5	▼ 1.7	▼ 3.7
REGION NORTH		27.8	▼ 3.3	▲ 0.8
REGION SOUTH		39.4	▼ 5.1	▼ 4.8
REGION EAST		45.9	▼ 1.4	▲ 1.5
REGION WEST		30.0	▼ 0.1	▼ 3.8
BE		44.5	▼ 1.6	▲ 3.9
BG		40.9	▼ 8.6	▲ 2.7
CZ		49.7	▲ 16.1	▼ 10.8
DK		18.2	▲ 4.6	▼ 8.9
DE		22.4	▲ 5.3	▼ 7.7
EE		15.4	▼ 2.5	▼ 2.6
IE		44.0	▲ 2.1	▲ 0.2
EL		33.2	▼ 9.7	▼ 3.5
ES		51.1	▼ 4.8	▼ 0.7
FR		42.2	▼ 15.1	▲ 11.4
HR		35.3	▼ 11.9	▲ 4.0
IT		18.0	▼ 8.2	▼ 0.8
CY		40.7	▲ 8.2	▲ 7.8
LV		40.8	▲ 0.7	▼ 8.6
LT		42.2	▼ 5.6	▲ 6.6
LU		34.5	▼ 1.6	▼ 23.9
HU		27.4	▼ 3.6	▲ 0.9
MT		27.0	▼ 18.5	▲ 4.5
NL		28.7	▼ 11.3	▲ 1.8
AT		44.7	▲ 8.3	▲ 13.0
PL		53.3	▼ 1.1	▲ 6.9
PT		60.8	▲ 10.2	▼ 15.0
RO		51.2	▼ 13.0	▲ 8.5
SI		31.4	▼ 24.0	▲ 16.8
SK		41.1	▼ 0.3	▼ 12.7
FI		28.2	▼ 14.5	▲ 2.8
SE		29.2	▲ 0.3	▲ 7.3
IS		27.5	▲ 8.1	▼ 9.3
NO		22.1	▼ 7.2	▼ 1.5
UK		39.0	▼ 1.1	▼ 2.9

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers currently selling online (N=4234)

Retailers in Portugal (53.9%), Romania (48.3%) and Poland (45.6%) are the most likely to say **higher costs of cross-border delivery compared to domestic delivery** as an important obstacle, compared to 13.4% in Estonia, 20.8% in Italy and 21.3% in Germany.

Q3a.4 How important are the following obstacles to the development of online sales to other EU countries by your company?

Higher costs of cross-border delivery compared to domestic delivery

(% - TOTAL 'IMPORTANT')

		2018	2018-2016	2016-2014
EU27_2019		31.2	▼ 3.1	▼ 4.4
EU28		31.7	▼ 2.9	▼ 4.0
REGION NORTH		27.3	▼ 4.8	▼ 0.1
REGION SOUTH		35.5	▼ 5.7	▼ 7.2
REGION EAST		40.8	▼ 0.7	▼ 3.1
REGION WEST		27.9	▼ 2.1	▼ 3.2
BE		37.4	▼ 1.2	▲ 1.3
BG		38.2	▼ 3.9	▼ 5.0
CZ		42.0	▲ 14.9	▼ 12.5
DK		22.6	▲ 4.3	▼ 8.4
DE		21.3	▲ 2.7	▼ 6.8
EE		13.4	▼ 9.9	▼ 1.5
IE		42.4	▲ 0.4	▲ 0.8
EL		25.2	▼ 9.8	▼ 10.6
ES		44.3	▼ 8.4	▼ 3.1
FR		39.7	▼ 13.8	▲ 10.4
HR		34.5	▼ 3.8	▼ 0.4
IT		20.8	▼ 3.0	▼ 4.0
CY		51.7	▲ 24.5	▲ 2.8
LV		42.6	▼ 1.2	▼ 1.6
LT		40.1	▼ 8.5	▲ 0.8
LU		43.1	▲ 12.1	▼ 20.7
HU		23.2	▼ 6.8	▲ 3.9
MT		23.4	▼ 9.6	▲ 2.7
NL		29.4	▼ 11.5	▲ 3.1
AT		33.8	▼ 0.8	▲ 8.5
PL		45.6	▲ 1.1	▼ 3.0
PT		53.9	▲ 2.2	▼ 5.0
RO		48.3	▼ 19.7	▲ 9.5
SI		25.2	▼ 19.8	▲ 4.4
SK		33.9	▼ 0.4	▼ 17.9
FI		25.1	▼ 19.6	▲ 11.4
SE		26.8	▲ 0.1	▲ 2.5
IS		22.1	▲ 6.4	▼ 10.9
NO		21.5	▼ 7.0	=
UK		35.7	▼ 2.0	▼ 1.0

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers currently selling online (N=4234)

At least half of all companies in Poland (54.0%), Romania (53.1%) and Portugal (51.2%) consider the **extra costs from after-sales service in cross-border transactions** to be an important obstacle to the development of online sales. At the other end of the scale 8.6% in Estonia, 14.4% in Denmark and 16.7% in Finland say the same.

Q3a.8 How important are the following obstacles to the development of online sales to other EU countries by your company?

Extra costs from after-sales service in cross-border transactions

		2018	2018-2016	2016-2014
EU27_2019		29.4	▼ 1.2	▼ 3.5
EU28		29.7	▼ 1.5	▼ 2.7
REGION NORTH		21.4	▼ 4.7	▲ 0.2
REGION SOUTH		36.0	▼ 0.9	▼ 2.7
REGION EAST		44.0	▲ 3.2	▼ 3.4
REGION WEST		24.6	▼ 1.7	▼ 3.8
BE		34.7	▼ 1.5	▲ 0.8
BG		30.6	▲ 3.8	▼ 12.9
CZ		45.2	▲ 15.9	▼ 8.5
DK		14.4	▲ 4.1	▼ 8.0
DE		18.3	▲ 2.9	▼ 8.3
EE		8.6	▼ 8.4	▼ 3.2
IE		38.1	▼ 1.7	▼ 0.3
EL		32.8	▼ 7.1	▲ 0.6
ES		45.4	▲ 3.4	▼ 5.9
FR		35.6	▼ 14.1	▲ 11.8
HR		36.9	▼ 8.5	▼ 12.2
IT		19.4	▼ 4.2	▲ 4.8
CY		21.7	▼ 9.1	▲ 7.4
LV		43.0	▲ 2.9	▲ 0.9
LT		41.3	▼ 5.6	▲ 1.5
LU		36.3	▲ 8.7	▼ 27.1
HU		32.2	▲ 0.2	▲ 1.7
MT		23.9	▼ 11.8	▲ 5.8
NL		24.3	▼ 8.7	▲ 7.1
AT		32.3	▲ 1.4	▲ 3.9
PL		54.0	▲ 3.2	▲ 1.3
PT		51.2	▼ 5.6	▲ 5.1
RO		53.1	▼ 4.3	▲ 3.6
SI		20.9	▼ 25.7	▲ 7.8
SK		29.7	▼ 5.0	▼ 10.1
FI		16.7	▼ 11.8	▲ 2.4
SE		20.5	▼ 2.5	▲ 5.0
IS		20.0	▼ 1.7	▼ 0.5
NO		18.9	▼ 6.9	▼ 6.9
UK		32.6	▼ 3.0	▲ 4.0

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers currently selling online (N=4234)

Companies in Romania (47.1%), Spain (45.3%) and Poland (45.3%) are the most likely to mention **restrictions on cross-border sales imposed by manufacturers or suppliers**, while those in Estonia (8.9%) and Germany (13.7%) in EU27_2019, as well as those in Norway (15.4%) are the least likely to do so.

Q3a.9 How important are the following obstacles to the development of online sales to other EU countries by your company?

Restrictions on cross-border sales imposed by manufacturers or suppliers

(% - TOTAL 'IMPORTANT')

		2018	2018-2016	2016-2014
EU27_2019		25.8	▼ 3.0	▼ 1.7
EU28		27.0	▼ 2.2	▼ 1.9
REGION NORTH		22.6	▼ 2.0	▼ 1.1
REGION SOUTH		33.4	▼ 0.2	▼ 5.6
REGION EAST		37.1	▲ 2.0	▼ 1.8
REGION WEST		20.6	▼ 5.3	▲ 0.9
BE		34.1	▲ 0.1	▲ 8.4
BG		31.7	▲ 5.5	▼ 10.3
CZ		32.1	▲ 14.1	▼ 7.8
DK		17.1	▲ 2.9	▼ 7.7
DE		13.7	▼ 2.2	▼ 1.3
EE		8.9	▼ 7.6	▲ 2.2
IE		42.8	▲ 10.4	▼ 2.2
EL		22.8	▼ 11.3	▼ 2.5
ES		45.3	▲ 3.6	▼ 2.0
FR		27.7	▼ 19.7	▲ 14.4
HR		25.2	▼ 9.3	▲ 3.3
IT		18.8	▼ 0.2	▼ 8.2
CY		27.4	▲ 9.4	▲ 7.7
LV		37.3	▼ 6.4	▲ 2.1
LT		43.5	▲ 3.3	▲ 3.7
LU		37.6	▲ 15.1	▼ 31.9
HU		20.6	▼ 2.3	▼ 5.7
MT		17.1	▼ 5.0	▲ 3.2
NL		27.2	▼ 11.2	▲ 4.3
AT		32.8	▲ 7.6	▲ 0.9
PL		45.3	▼ 5.4	▲ 8.8
PT		40.3	▼ 3.8	▲ 6.1
RO		47.1	▼ 0.6	▼ 1.5
SI		17.7	▼ 15.7	▲ 8.1
SK		32.9	▲ 2.0	▼ 14.5
FI		21.4	▼ 6.1	▼ 1.1
SE		20.1	▲ 1.1	▲ 2.9
IS		20.8	▲ 2.2	▼ 0.3
NO		15.4	▼ 10.1	▼ 0.6
UK		36.0	▲ 4.1	▼ 3.6

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers currently selling online (N=4234)

Extra costs arising from language differences are most likely to be mentioned as an important obstacle by companies in Romania (41.8%), Poland (40.0%) and Spain (38.5%), and least likely to be mentioned by those in Denmark (8.1%), Estonia (10.8%) and Germany (10.9%).

Q3a.7 How important are the following obstacles to the development of online sales to other EU countries by your company?

Extra costs arising from language differences
(% - TOTAL 'IMPORTANT')

		2018	2018-2016	2016-2014
EU27_2019		21.8	▼ 3.4	▼ 2.7
EU28		21.7	▼ 4.3	▼ 2.0
REGION NORTH		16.3	▼ 5.4	▼ 0.7
REGION SOUTH		28.2	▼ 1.5	▼ 7.2
REGION EAST		33.5	▲ 1.5	▲ 0.4
REGION WEST		17.5	▼ 4.7	▼ 0.8
BE		28.6	▼ 3.8	▼ 0.8
BG		25.0	▼ 12.4	▲ 5.1
CZ		38.9	▲ 18.2	▲ 1.0
DK		8.1	▼ 1.0	▼ 6.8
DE		10.9	▼ 2.8	▼ 3.3
EE		10.8	▼ 10.7	▼ 4.4
IE		25.0	▲ 1.0	▼ 4.5
EL		17.3	▼ 3.0	▼ 8.3
ES		38.5	▼ 1.0	▼ 7.4
FR		27.2	▼ 20.0	▲ 15.4
HR		19.7	▼ 2.7	▼ 6.9
IT		15.6	▼ 0.2	▼ 1.4
CY		14.8	▼ 0.1	▲ 5.9
LV		28.5	▼ 3.2	▲ 4.9
LT		31.5	▲ 6.0	▼ 6.2
LU		26.9	▲ 6.4	▼ 18.5
HU		23.4	▲ 7.9	▼ 13.8
MT		16.6	▼ 6.9	▼ 1.6
NL		25.1	▲ 7.8	▼ 1.4
AT		28.8	▲ 1.8	▲ 8.9
PL		40.0	▼ 5.2	▲ 7.2
PT		37.4	▼ 2.3	▲ 2.3
RO		41.8	▲ 5.1	▲ 0.5
SI		15.7	▼ 9.5	▼ 3.1
SK		19.3	▼ 5.3	▼ 9.1
FI		19.6	▼ 10.1	▼ 2.1
SE		14.1	▼ 7.0	▲ 4.8
IS		17.4	▲ 3.3	▲ 1.8
NO		16.0	▼ 2.6	▲ 3.0
UK		21.0	▼ 11.4	▲ 3.2

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers currently selling online (N=4234)

Since 2016, there have been the following changes in the proportion of retailers in EU27_2019 mentioning each of these issues as obstacles:

a decline in the proportion of companies that mention **restrictions on cross-border sales imposed by manufacturers or suppliers** (-3.0 pp);

a decrease of 3.4 pp in the proportion of companies that mention **extra costs arising from language differences**;

a decrease in the proportion of companies that mention **higher costs of cross-border delivery compared to domestic delivery** (-3.1 pp);

a decline in the proportion of companies that mention **differences in national contract law** (-3.5 pp);

a decline in the proportion of companies that mention **differences in national consumer protection rules** (-2.4 pp).

The highlights from the country trend analysis are presented in the table below. They show retailers in the Czech Republic are much more likely to consider a range of these obstacles as important, compared to 2016. In contrast, retailers in Slovenia are less likely to do so.

Potential important obstacle	Largest increase since 2016	Largest decrease since 2016
Higher risk of fraud and non-payments in cross border sales	the Czech Republic (+14.3 pp)	Slovenia (-16.8 pp)
Differences in national tax regulations	The Czech Republic & Romania (both +11.9 pp)	Slovenia (-25.1 pp)
Differences in national contract law	the Czech Republic (+16.4 pp)	Slovenia (-32.6 pp)
Differences in national consumer protection rules	the Czech Republic (+16.8 pp)	Slovenia (-23.2 pp)
Higher transport costs due to geographic distance	the Czech Republic (+15.9 pp)	Slovenia (-22.7 pp)
Potentially higher costs involved in resolving complaints and disputes cross-border	the Czech Republic (+16.1 pp)	Slovenia (-24.0 pp)
Higher costs of cross-border delivery compared to domestic delivery	Cyprus (+24.5 pp)	Slovenia (-19.8 pp)
Extra costs from after-sales service in cross-border transactions	the Czech Republic (+15.9 pp)	Slovenia (-25.7 pp)
Restrictions on cross-border sales imposed by manufacturers or suppliers	the Czech Republic (+14.1 pp)	France (-19.7 pp)
Extra costs arising from language differences	the Czech Republic (+18.2 pp)	France (-20.0 pp)

The **analysis of company characteristics** shows relatively few consistent patterns across the different obstacles asked about:

- o Companies in the trade sector are more likely than service sector companies to consider each issue an obstacle;
 - o Companies in service sector H are more likely to mention each obstacle, with the exception of differences in national consumer protection rules, differences in national contract law, higher risk of fraud and non-payment, or extra costs from after-sales service in cross-border transactions;
 - o Companies that sell non-food products are more likely to think all but one of these issues are obstacles. The exception is are the extra costs arising from language differences;
 - o Commercial or sales managers are consistently less likely to say each issue is an obstacle, with the exception of the higher risk of fraud and non-payments in cross-border sales.
- o Obstacles to developing online sales amongst retailers not currently selling online

Retailers that do not currently sell online were asked to evaluate the importance of a number of possible obstacles to their company developing online sales.

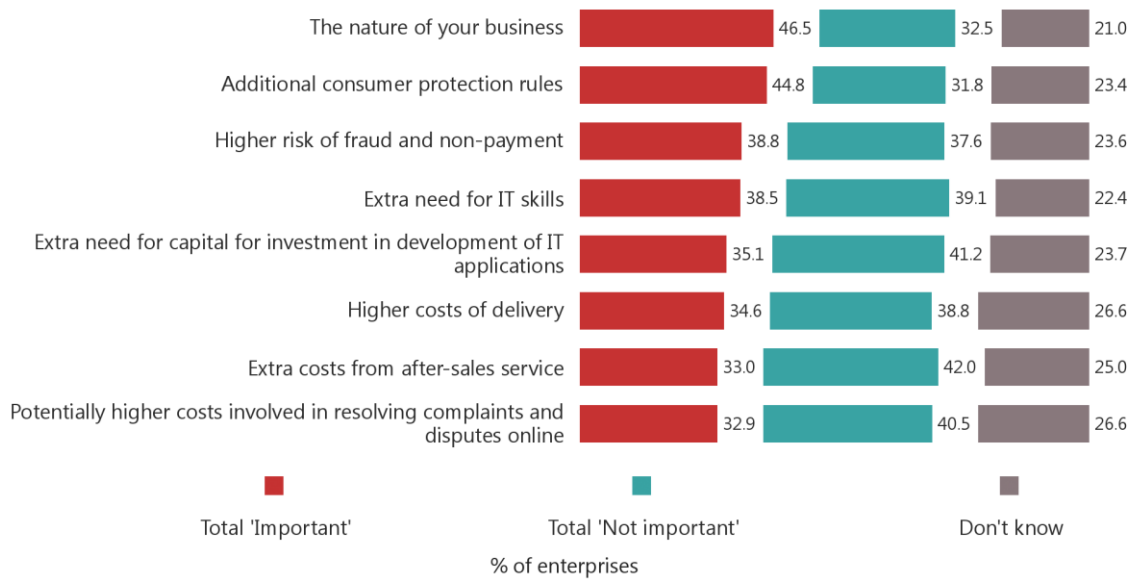
- The nature of their business is the most important obstacle to retailers starting to sell online -

Almost half of the retailers in EU27_2019 who do not currently sell online say the **nature of their business** is an important obstacle to the development of online sales (46.5%) – in fact almost one third consider it a very important obstacle (30.7%).

More than four in ten (44.8%) mention **additional consumer protection rules**, while 38.8% mention a **higher risk of fraud and non-payment**. Almost four in ten (38.5%) say the **extra need for IT skills** is an important obstacle to the development of online sales.

At least one third mention the **extra need for capital for investment in development of IT applications** (35.1%), **higher costs of delivery** (34.6%), or **extra costs from after-sales service** (33.0%). Almost one third (32.9%) mention the **potentially higher costs involved in resolving complaints and disputes online**.

Q3b How important are the following obstacles to the development of online sales by your company?
(% - EU27_2019)

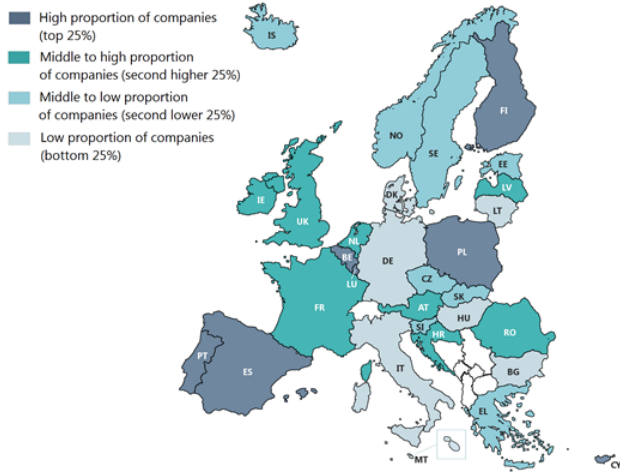


Base: All retailers in EU27_2019 currently not selling online (N=5971)

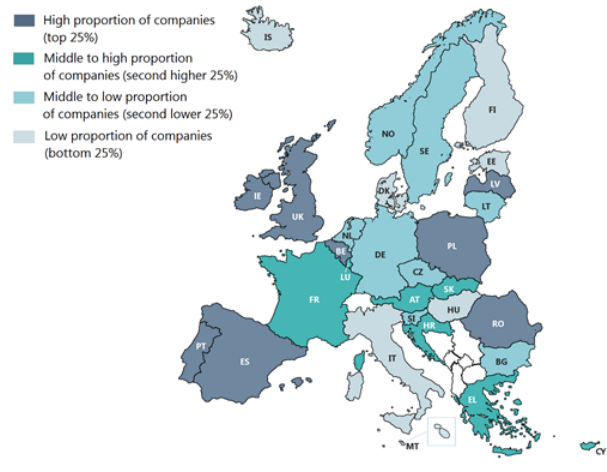
Amongst retailers that do not currently sell online, those in the eastern region are more likely to mention the **potentially higher costs involved in resolving complaints and disputes online**, the **higher risk of fraud or non-payment**, **extra costs form after-sales service**, **extra need for IT skills**, and **extra need for capital for investment in development of IT applications** as important barriers. Those in the south are also more likely to mention **extra need for capital for investment in development of IT applications**.

Retailers in the northern region are less likely to mention each obstacle, while those in the west are less likely to mention a higher risk of fraud and non-payment, higher costs of delivery, extra need for capital for investment in development of IT applications, or potentially higher costs involved in resolving complaints and disputes online.

Q3b.8 How important are the following obstacles to the development of online sales by your company?
The nature of your business
 (% - TOTAL 'IMPORTANT')

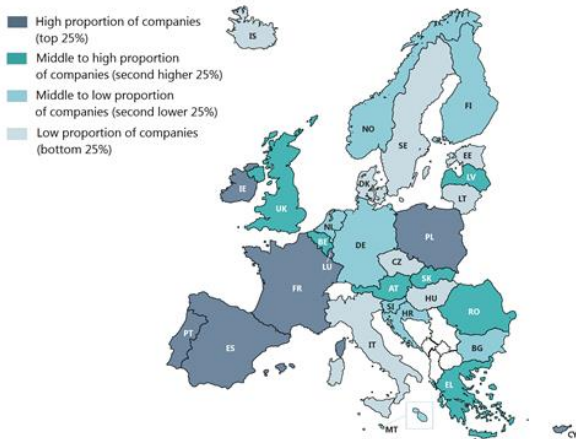


Q3b.4 How important are the following obstacles to the development of online sales by your company?
Higher risk of fraud and non-payment
 (% - TOTAL 'IMPORTANT')

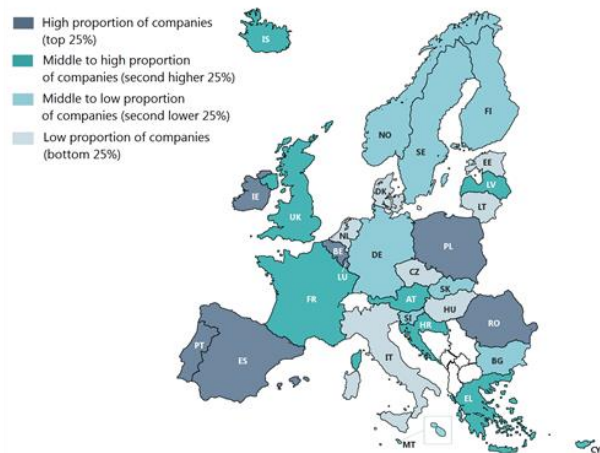


Base: All retailers currently not selling online (N=6513)

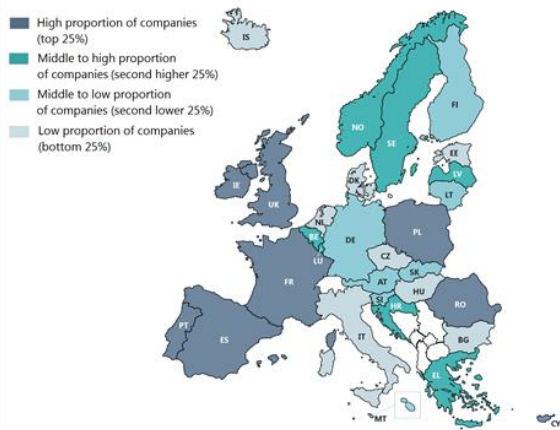
Q3b.1 How important are the following obstacles to the development of online sales by your company?
Additional consumer protection rules
 (% - TOTAL 'IMPORTANT')



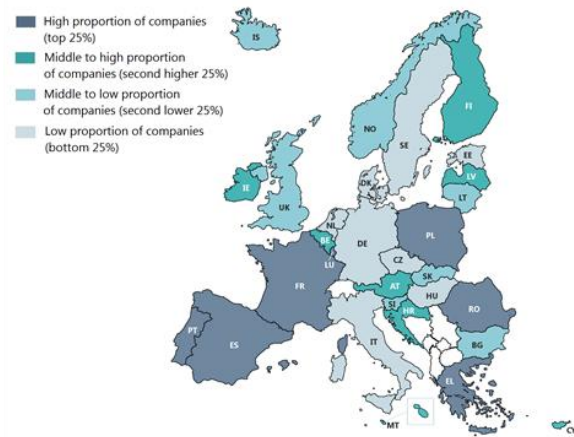
Q3b.6 How important are the following obstacles to the development of online sales by your company?
Extra need for IT skills
 (% - TOTAL 'IMPORTANT')



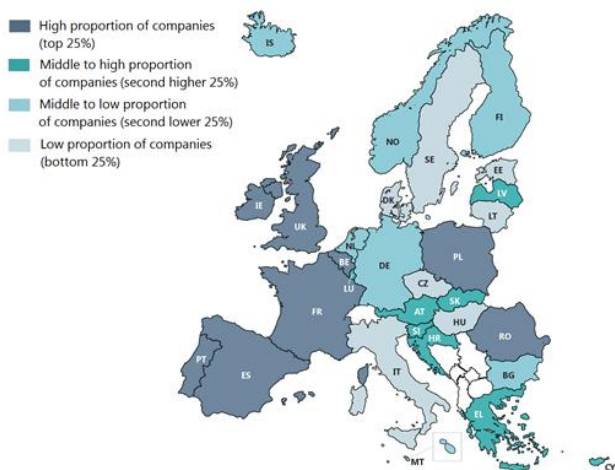
Q3b.2 How important are the following obstacles to the development of online sales by your company?
Higher costs of delivery
 (% - TOTAL 'IMPORTANT')



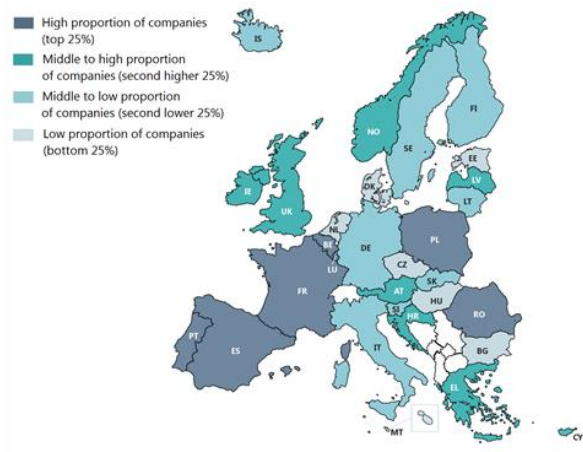
Q3b.7 How important are the following obstacles to the development of online sales by your company?
Extra need for capital for investment in development of IT applications
 (% - TOTAL 'IMPORTANT')



Q3b.3 How important are the following obstacles to the development of online sales by your company?
Potentially higher costs involved in resolving complaints and disputes online
 (% - TOTAL 'IMPORTANT')



Q3b.5 How important are the following obstacles to the development of online sales by your company?
Extra costs from after-sales service
 (% - TOTAL 'IMPORTANT')



Base: All retailers currently not selling online (N=6513)

In 16 countries, at least half of the companies that do not currently sell online say the **nature of their business** is an important obstacle to the development of online sales²¹.

At least seven in ten companies in Poland (74.0%), Spain (71.3%) as well as 69.7% in Portugal say this, compared to 18.9% in Hungary, 25.5% in Italy and 26.7% in Denmark.

Q3b.8 How important are the following obstacles to the development of online sales by your company?

The nature of your business
(% - TOTAL 'IMPORTANT')

	2018	2018-2016	2016-2014
EU27_2019	46.5	▼ 2.9	▼ 1.6
EU28	48.7	▼ 2.9	▲ 0.3
REGION NORTH	43.2	▲ 2.4	▲ 0.7
REGION SOUTH	44.9	▼ 13.1	▲ 2.2
REGION EAST	50.3	▼ 0.3	▼ 0.7
REGION WEST	46.2	=	▼ 4.0
BE	65.0	▼ 4.5	▼ 0.1
BG	34.5	▼ 7.1	▼ 5.1
CZ	45.4	▲ 11.9	▼ 11.5
DK	26.7	▼ 1.6	▲ 6.4
DE	39.8	▲ 5.6	▼ 9.4
EE	49.5	▼ 4.2	▲ 6.8
IE	61.0	▼ 11.0	▲ 11.8
EL	53.1	▲ 3.0	▼ 12.3
ES	71.3	▲ 4.1	▼ 1.0
FR	58.6	▼ 4.3	▲ 5.4
HR	54.2	▼ 1.1	▼ 8.0
IT	25.5	▼ 21.7	▲ 3.8
CY	61.9	▲ 13.5	▲ 14.9
LV	57.7	▲ 1.2	▼ 1.6
LT	31.1	▼ 6.3	▲ 3.5
LU	69.5	▲ 9.9	▼ 6.4
HU	18.9	▲ 0.4	▼ 13.9
MT	32.1	▼ 3.5	▼ 14.5
NL	54.1	▼ 2.9	▼ 7.4
AT	53.8	▼ 6.7	▲ 28.7
PL	74.0	▲ 6.4	▲ 9.8
PT	69.7	▼ 1.6	▲ 4.9
RO	55.4	▼ 5.3	▼ 4.7
SI	47.9	▼ 18.5	▲ 42.8
SK	49.5	▲ 0.3	▲ 8.1
FI	63.3	▼ 3.0	▼ 4.6
SE	41.8	▲ 12.7	▼ 7.8
IS	42.9	▲ 8.5	▼ 9.4
NO	43.9	▲ 6.5	▼ 3.1
UK	61.0	▼ 1.5	▲ 9.5

- Results statistically significantly higher than EU results (T-test at 95% level)
- Results statistically significantly lower than EU results (T-test at 95% level)
- Statistically significant increase from one year to the other (T-test at 95% level)
- Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers currently not selling online (N=6513)

²¹ For all country analysis for Q3b results from Iceland (n=55), Cyprus (n=69), Malta (n=79) and Luxembourg (n=82) should be interpreted with caution due to low base size.

In 11 countries, at least half mention the **higher risk of fraud and non-payment** as an important obstacle. Companies in Poland (72.6%), Portugal (64.4%) and Spain (63.2%) are the most likely to do so, while those in Estonia (6.9%) and Hungary (17.9%) in EU27_2019, as well as in Iceland (18.1%) are the least likely to consider this an important obstacle.

Q3b.4 How important are the following obstacles to the development of online sales by your company?

Higher risk of fraud and non-payment
(% - TOTAL 'IMPORTANT')

		2018	2018-2016	2016-2014
EU27_2019		38.8	▼ 4.6	▼ 1.8
EU28		41.2	▼ 5.4	▼ 0.2
REGION NORTH		31.1	▼ 1.3	▲ 0.3
REGION SOUTH		40.3	▼ 13.9	▲ 1.8
REGION EAST		46.5	▼ 3.4	▲ 0.8
REGION WEST		36.2	▼ 1.3	▼ 4.2
BE		54.7	▼ 11.0	▼ 0.6
BG		31.9	▼ 17.4	▼ 1.8
CZ		29.4	▲ 9.1	▼ 12.8
DK		23.9	▲ 13.6	▼ 2.3
DE		29.2	▲ 3.9	▼ 5.4
EE		6.9	▼ 8.4	▼ 9.2
IE		61.6	▼ 5.8	▲ 12.4
EL		42.0	▼ 10.3	▼ 1.5
ES		63.2	▲ 8.2	▼ 11.1
FR		53.1	▼ 4.8	▼ 1.4
HR		49.8	▼ 1.3	▼ 3.3
IT		24.0	▼ 27.0	▲ 9.6
CY		51.1	▲ 7.0	▲ 19.5
LV		60.5	▲ 2.5	▼ 12.4
LT		33.9	▼ 20.2	▲ 12.8
LU		50.6	▼ 2.3	▼ 18.9
HU		17.9	▼ 0.8	▼ 13.3
MT		23.9	▼ 6.1	▼ 21.8
NL		34.7	▼ 6.4	▼ 9.3
AT		45.7	▼ 2.2	▲ 20.3
PL		72.6	▲ 0.7	▲ 13.2
PT		64.4	▼ 2.0	▼ 2.6
RO		55.3	▼ 4.4	▼ 3.2
SI		39.5	▼ 11.1	▲ 25.6
SK		44.8	▼ 4.7	▲ 4.0
FI		24.9	▼ 7.5	▼ 4.4
SE		30.7	▲ 6.1	▼ 1.3
IS		18.1	▼ 3.2	▼ 5.1
NO		32.1	▼ 2.4	▼ 11.0
UK		54.7	▼ 7.0	▲ 5.4

































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- Statistically significant decrease from one year to the other (T-test at 95% level)





Base: All retailers currently not selling online (N=6513)

In 21 countries, at least one third of retailers mention **additional consumer protection rules**. At least seven in ten retailers in Portugal (74.7%) and Poland (70.6%) say this, as do 68.4% in Spain. At the other end of the scale 6.9% in Estonia, 16.5% in Hungary and 22.1% in Italy say the same.

Q3b.1 How important are the following obstacles to the development of online sales by your company?

Additional consumer protection rules
(% - TOTAL 'IMPORTANT')

	2018	2018-2016	2016-2014
EU27_2019 	44.8	▲ 1.6	▼ 1.6
EU28 	46.2	▲ 1.3	▼ 0.1
REGION NORTH	29.9	▲ 1.0	▲ 3.2
REGION SOUTH	43.0	▼ 6.7	▲ 4.6
REGION EAST	46.8	▼ 1.4	▼ 0.4
REGION WEST	47.2	▲ 6.6	▼ 6.2
BE 	56.2	▼ 0.6	▲ 0.9
BG 	36.8	▼ 7.0	▼ 6.2
CZ 	31.5	▲ 16.2	▼ 13.0
DK 	23.8	▲ 14.7	▼ 0.4
DE 	43.0	▲ 12.4	▼ 10.6
EE 	6.9	▼ 5.5	▼ 6.4
IE 	59.4	▼ 3.3	▲ 5.6
EL 	56.0	▲ 8.9	▼ 9.7
ES 	68.4	▲ 19.6	▼ 11.2
FR 	60.3	▼ 0.3	▲ 0.1
HR 	43.6	▼ 5.0	▼ 1.8
IT 	22.1	▼ 21.8	▲ 13.7
CY 	58.6	▲ 18.9	▲ 15.3
LV 	55.0	▲ 7.1	▼ 10.1
LT 	32.2	▼ 15.7	▲ 13.8
LU 	57.1	▲ 3.5	▼ 19.7
HU 	16.5	▼ 2.3	▼ 12.3
MT 	36.3	▲ 2.4	▼ 22.4
NL 	42.4	▲ 0.8	▼ 4.2
AT 	53.9	▲ 2.6	▲ 24.2
PL 	70.6	▼ 0.7	▲ 12.5
PT 	74.7	▼ 1.1	▲ 7.5
RO 	56.9	▼ 3.8	▼ 5.7
SI 	43.5	▼ 8.3	▲ 27.1
SK 	44.0	▲ 0.1	▲ 1.3
FI 	36.9	▼ 6.2	▲ 3.5
SE 	24.5	▲ 7.0	▲ 3.8
IS 	34.1	▲ 2.2	▲ 6.4
NO 	36.7	▲ 9.0	▼ 12.4
UK 	54.2	▲ 1.4	▲ 8.0

































-  Results statistically significantly higher than EU results (T-test at 95% level)
-  Results statistically significantly lower than EU results (T-test at 95% level)
-  Statistically significant increase from one year to the other (T-test at 95% level)
-  Statistically significant decrease from one year to the other (T-test at 95% level)





Base: All retailers currently not selling online (N=6513)

In 17 countries at least one third of these companies mention the **extra need for IT skills** as an important obstacle. Companies in Poland (70.1%), Spain (66.5%) and Portugal (66.2%) are the most likely to mention this, while those in Estonia (8.0%), Hungary (14.2%) and the Czech Republic (19.5%) are the least likely to do so.

Q3b.6 How important are the following obstacles to the development of online sales by your company?

Extra need for IT skills
(% - TOTAL 'IMPORTANT')

	2018	2018-2016	2016-2014
EU27_2019 	38.5	▼ 1.9	▼ 2.1
EU28 	39.1	▼ 2.8	▼ 0.6
REGION NORTH	30.7	▼ 1.3	▲ 0.5
REGION SOUTH	41.2	▼ 6.0	▼ 5.3
REGION EAST	42.9	▼ 1.0	▲ 1.2
REGION WEST	36.8	▼ 0.5	▼ 1.5
BE 	53.4	▼ 4.3	▲ 4.9
BG 	30.3	▼ 10.2	▼ 4.8
CZ 	19.5	▲ 7.8	▼ 7.2
DK 	26.0	▲ 12.2	▼ 2.9
DE 	32.0	▲ 4.5	▼ 3.6
EE 	8.0	▼ 9.7	▼ 6.7
IE 	54.6	▼ 5.9	▲ 9.6
EL 	42.5	▼ 14.8	▼ 5.1
ES 	66.5	▲ 22.7	▼ 19.7
FR 	48.0	▼ 7.1	▲ 4.1
HR 	39.0	▼ 3.7	▼ 7.1
IT 	23.5	▼ 20.3	▲ 0.8
CY 	48.8	▲ 8.0	▲ 11.5
LV 	45.5	▼ 2.0	▼ 2.0
LT 	28.3	▼ 15.7	▲ 15.7
LU 	54.4	▲ 2.8	▼ 16.0
HU 	14.2	▼ 0.1	▼ 6.9
MT 	36.2	▼ 4.4	▼ 9.0
NL 	28.1	▼ 9.6	▼ 5.1
AT 	45.6	▼ 2.7	▲ 20.8
PL 	70.1	▲ 2.0	▲ 12.0
PT 	66.2	▲ 0.2	▲ 1.1
RO 	56.1	▲ 3.0	▼ 4.1
SI 	34.3	▼ 16.9	▲ 23.7
SK 	37.3	▼ 3.7	▲ 2.6
FI 	30.3	▼ 11.3	▼ 1.6
SE 	34.2	▲ 7.3	▼ 6.1
IS 	49.0	▲ 13.1	▼ 8.2
NO 	37.1	▲ 3.1	▼ 11.2
UK 	42.5	▼ 6.7	▲ 6.9

































 Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)





Base: All retailers currently not selling online (N=6513)

Higher costs of delivery are most likely to be mentioned as important by companies in Portugal (63.2%), Poland (58.4%) and Ireland (55.8%), and least likely to be mentioned by those in Estonia (8.3%), Hungary (15.3%) and Denmark (15.7%).

Q3b.2 How important are the following obstacles to the development of online sales by your company?

Higher costs of delivery
(% - TOTAL 'IMPORTANT')

	2018	2018-2016	2016-2014
EU27_2019 	34.6	▼ 2.6	▼ 0.8
EU28 	36.6	▼ 3.3	▲ 1.2
REGION NORTH	29.9	▲ 0.9	▼ 1.0
REGION SOUTH	35.3	▼ 10.8	▲ 1.7
REGION EAST	38.3	▲ 0.5	▼ 3.6
REGION WEST	33.7	▼ 0.4	▼ 0.3
BE 	42.5	▼ 10.0	▲ 2.8
BG 	25.6	▼ 5.7	▼ 5.8
CZ 	19.3	▲ 8.2	▼ 10.3
DK 	15.7	▲ 5.0	▼ 5.0
DE 	30.2	▲ 4.2	▲ 1.3
EE 	8.3	▼ 8.7	▼ 2.4
IE 	55.8	▼ 0.3	▲ 3.3
EL 	37.2	▼ 3.0	▼ 5.3
ES 	53.5	▲ 12.8	▼ 13.2
FR 	47.6	▼ 7.4	▲ 4.2
HR 	38.5	▼ 4.8	▼ 8.2
IT 	20.3	▼ 29.2	▲ 12.2
CY 	49.2	▲ 14.4	▲ 14.8
LV 	46.5	▲ 0.7	▼ 13.6
LT 	29.5	▼ 11.3	▲ 7.6
LU 	42.7	▲ 4.7	▼ 21.4
HU 	15.3	▲ 2.2	▼ 15.0
MT 	28.2	▼ 0.2	▼ 24.6
NL 	26.7	▼ 1.5	▼ 12.0
AT 	28.4	▼ 6.1	▲ 13.2
PL 	58.4	▲ 2.0	▲ 0.9
PT 	63.2	▲ 6.9	▼ 5.5
RO 	53.5	▲ 3.7	▼ 4.2
SI 	31.9	▼ 8.6	▲ 17.3
SK 	27.0	▼ 5.9	▲ 1.7
FI 	31.6	▼ 8.5	▼ 1.1
SE 	35.5	▲ 13.3	▼ 1.1
IS 	26.8	▼ 8.7	▲ 3.8
NO 	36.5	▲ 3.7	▼ 8.3
UK 	47.2	▼ 6.3	▲ 10.2

































 Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)


Base: All retailers currently not selling online (N=6513)


Companies in Poland (60.7%), Portugal (60.2%) and Romania (56.8%) are the most likely to consider the **extra need for capital for investment in development of IT applications** as an important obstacle to the development of online sales. Companies in Estonia (11.5%), Hungary (15.1%) and Denmark (17.1%) are the least likely to consider this obstacle important.


Q3b.7 How important are the following obstacles to the development of online sales by your company?


Extra need for capital for investment in development of IT applications
(% - TOTAL 'IMPORTANT')

	2018	2018-2016	2016-2014
EU27_2019 	35.1	▼ 2.4	▼ 3.6
EU28 	34.9	▼ 4.2	▼ 1.2
REGION NORTH	26.4	▼ 3.0	▲ 1.7
REGION SOUTH	39.1	▼ 8.0	▼ 2.0
REGION EAST	41.2	▲ 0.9	▼ 1.2
REGION WEST	32.1	▼ 1.0	▼ 5.6
BE 	43.9	=	▼ 3.9
BG 	29.1	▼ 9.4	▼ 0.2
CZ 	26.4	▲ 14.9	▼ 13.3
DK 	17.1	▲ 8.3	▼ 4.1
DE 	26.8	▲ 1.7	▼ 8.1
EE 	11.5	▼ 9.1	▼ 7.7
IE 	40.0	▼ 16.7	▲ 12.0
EL 	51.7	▼ 11.1	▼ 2.5
ES 	55.5	▲ 13.6	▼ 15.4
FR 	53.3	▲ 3.4	▼ 3.5
HR 	39.7	▼ 12.3	▲ 0.8
IT 	24.7	▼ 22.3	▲ 6.6
CY 	49.5	▲ 12.1	▲ 5.7
LV 	43.0	▼ 2.5	▼ 2.1
LT 	28.2	▼ 16.1	▲ 13.4
LU 	51.8	▲ 5.8	▼ 7.9
HU 	15.1	▼ 1.0	▼ 8.9
MT 	40.7	▼ 1.8	▼ 14.5
NL 	19.3	▼ 13.0	▼ 3.1
AT 	40.0	▼ 0.9	▲ 18.9
PL 	60.7	▲ 1.4	▲ 4.4
PT 	60.2	▲ 1.4	▼ 6.8
RO 	56.8	▲ 7.3	▼ 2.7
SI 	33.4	▼ 6.5	▲ 16.2
SK 	29.7	▼ 2.8	▼ 2.0
FI 	38.3	▼ 6.6	▲ 6.8
SE 	22.0	▲ 2.0	▼ 1.9
IS 	32.3	▲ 5.7	▼ 4.1
NO 	27.8	▲ 2.4	▼ 10.1
UK 	33.4	▼ 13.4	▲ 13.1

 Results statistically significantly higher than EU results (T-test at 95% level)

 Results statistically significantly lower than EU results (T-test at 95% level)

 Statistically significant increase from one year to the other (T-test at 95% level)

 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers currently not selling online (N=6513)

The **potentially higher costs involved in resolving complaints and disputes** is most likely to be considered an important obstacle by companies in Portugal (64.4%), Poland (58.1%) and Spain (53.7%), and least likely to be considered important by those in Estonia (6.4%), Hungary (15.4%) and Denmark (16.1%).

Q3b.3 How important are the following obstacles to the development of online sales by your company?

Potentially higher costs involved in resolving complaints and disputes online

(% - TOTAL 'IMPORTANT')

		2018	2018-2016	2016-2014
EU27_2019		32.9	▼ 2.9	▼ 1.7
EU28		34.7	▼ 3.0	▼ 0.3
REGION NORTH		22.2	▼ 2.8	▲ 0.6
REGION SOUTH		37.2	▼ 11.3	▲ 3.8
REGION EAST		38.2	▲ 1.5	▼ 1.5
REGION WEST		30.3	▼ 0.9	▼ 3.8
BE		44.7	▼ 8.4	▲ 8.3
BG		24.0	▼ 2.2	▼ 7.9
CZ		22.6	▲ 7.7	▼ 10.1
DK		16.1	▲ 7.5	▼ 4.6
DE		25.4	▲ 5.4	▼ 8.8
EE		6.4	▼ 4.1	▼ 4.8
IE		45.2	▼ 9.2	▲ 13.2
EL		43.8	▼ 3.9	▼ 2.8
ES		53.7	▲ 3.4	▼ 2.9
FR		44.5	▼ 9.3	▲ 5.2
HR		39.0	▼ 5.8	▲ 0.2
IT		22.9	▼ 20.6	▲ 7.8
CY		41.1	▲ 9.0	▲ 16.0
LV		40.9	▲ 5.0	▼ 8.3
LT		22.4	▼ 15.7	▲ 9.6
LU		39.1	▼ 2.3	▼ 14.6
HU		15.4	▲ 1.9	▼ 5.7
MT		27.5	▲ 1.3	▼ 29.9
NL		25.1	▼ 7.4	▼ 4.5
AT		36.1	▼ 3.4	▲ 21.4
PL		58.1	▲ 3.3	▲ 6.3
PT		64.4	▲ 0.4	▲ 3.0
RO		50.8	▲ 4.2	▼ 4.1
SI		32.2	▼ 7.6	▲ 19.3
SK		30.9	▲ 1.7	▼ 5.2
FI		28.9	▼ 9.8	▲ 1.1
SE		18.9	▲ 0.2	▲ 1.7
IS		26.1	▼ 1.5	▼ 2.2
NO		27.4	▼ 1.1	▼ 7.1
UK		45.2	▼ 2.5	▲ 5.0

































- Results statistically significantly higher than EU results (T-test at 95% level)
- Results statistically significantly lower than EU results (T-test at 95% level)
- Statistically significant increase from one year to the other (T-test at 95% level)
- Statistically significant decrease from one year to the other (T-test at 95% level)





Base: All retailers currently not selling online (N=6513)

Companies in Portugal (60.0%), Poland (59.9%) and Spain (52.8%) are the most likely to say **extra costs from after-sales service** are an important obstacle to developing online sales, while those in Estonia (7.3%), Denmark (12.2%) and Hungary (14.7%) are the least likely to do so.

Q3b.5 How important are the following obstacles to the development of online sales by your company?

Extra costs from after-sales service
(% - TOTAL 'IMPORTANT')

	2018	2018-2016	2016-2014
EU27_2019 	33.0	▼ 1.3	▼ 2.8
EU28 	33.6	▼ 2.1	▼ 2.2
REGION NORTH	23.6	▲ 0.8	▼ 0.8
REGION SOUTH	35.9	▼ 10.1	▲ 4.1
REGION EAST	37.4	▲ 2.2	▼ 7.0
REGION WEST	31.3	▲ 1.0	▼ 4.2
BE 	40.6	▼ 7.0	▲ 4.9
BG 	19.6	▼ 7.0	▼ 7.7
CZ 	18.8	▲ 8.6	▼ 12.2
DK 	12.2	▲ 7.6	▼ 9.6
DE 	28.8	▲ 8.7	▼ 8.8
EE 	7.3	▼ 5.2	▲ 0.7
IE 	39.7	▼ 7.8	▲ 3.0
EL 	32.8	▼ 13.3	▼ 4.6
ES 	52.8	▲ 8.5	▼ 5.6
FR 	41.6	▼ 11.1	▲ 5.7
HR 	36.2	▼ 7.2	▼ 5.4
IT 	23.4	▼ 20.4	▲ 10.3
CY 	38.8	▲ 11.6	▲ 8.2
LV 	36.7	▼ 4.2	▼ 10.8
LT 	25.4	▼ 8.3	▲ 7.9
LU 	51.2	▲ 21.5	▼ 19.6
HU 	14.7	▼ 0.3	▼ 13.5
MT 	21.2	▲ 6.7	▼ 31.7
NL 	20.3	▼ 9.6	▼ 4.2
AT 	33.7	▼ 8.1	▲ 23.4
PL 	59.9	▲ 5.8	▼ 2.5
PT 	60.0	▼ 3.2	▲ 3.6
RO 	51.5	▲ 7.8	▼ 11.3
SI 	29.5	▼ 6.7	▲ 14.7
SK 	29.5	▲ 0.1	▼ 6.8
FI 	28.8	▲ 2.8	▲ 1.4
SE 	25.1	▲ 5.9	▲ 1.6
IS 	25.1	=	▼ 8.4
NO 	29.9	▲ 5.8	▼ 10.5
UK 	36.6	▼ 6.2	▼ 1.0

 Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers currently not selling online (N=6513)

Since 2016, there have been decreases in the proportion of this group of EU retailers mentioning almost all of these issues as obstacles:

- a decline of 2.9 pp in the proportion that mention the **nature of their business**;
- a decrease of 4.6 pp in proportion that mention the **higher risk of fraud and non-payment**;
- a decline of 1.9 pp in the proportion that mention the **extra need for IT skills**;
- a decrease of 2.6 pp in proportion that mention **higher costs of delivery**;
- **extra need for capital for investment in development of IT applications** is also less likely to be mentioned (-2.4 pp);
- a decline of 2.9 pp in the proportion that mention **potentially higher costs involved in resolving complaints and disputes online**.

Highlights from the country trend analysis are presented in the table below. They show retailers in Italy are consistently less likely to consider each of these obstacles as important.

Potential important obstacle	Largest <u>increase</u> since 2016	Largest <u>decrease</u> since 2016
Nature of their business	Sweden (+12.7 pp)	Italy (-21.7 pp)
Higher risk of fraud and non-payment	Denmark (+13.6 pp)	Italy (-27.0 pp)
Additional consumer protection rules	Spain (+19.6 pp)	Italy (-21.8 pp)
Extra need for IT skills	Spain (+22.8 pp)	Italy (-20.3 pp)
Higher costs of delivery	Sweden (+13.3 pp)	Italy (-29.2 pp)
Extra need for capital for investment in development of IT applications	The Czech Republic (+14.9 pp)	Ireland (-16.7 pp)
Potentially higher costs involved in resolving complaints and disputes online	The Czech Republic (+7.7 pp)	Italy (-20.6 pp)
Extra costs from after-sales service	Luxembourg (+21.5 pp)	Italy (-20.4 pp)

The **analysis of company characteristics** shows several patterns across obstacles:

- Companies in the trade sector are statistically more likely than those in the services sector to consider each issue an obstacle;
- Retailers in service sectors I, J and L are less likely to mention most obstacles;
- Companies engaged in distance sales are more likely to mention each obstacle, with the exception of **extra costs from after-sales service**;
- Companies that are interested in selling online, and those that are confident to sell online are more likely to mention each obstacle;
- Companies that sell non-food products are more likely to consider each issue an obstacle, with the exception of the **nature of their business**.

Other notable results include:

- o Medium sized companies are more likely to mention **higher risk of fraud or non-payment** (43.7%). Large companies are more likely to mention the **nature of their business** (60.8%);
- o Companies that sell cross-border to other EU countries are more likely to mention a **higher risk of fraud and non-payment** (45.4%);
- o Companies that sell food products are more likely to mention **higher costs of delivery** (40.9%).

5. Cross-border Sales in the Internal Market

This final chapter of the report covers cross-border sales within EU27_2019. The proportion of retailers already making cross-border sales, as well as the countries these sales are made to, will be considered. The approximate proportion of sales that are cross-border is also reviewed. Finally, the languages retailers use to sell to consumers will be presented.

5.1. Current level of cross-border sales

a) EU countries to which cross-border sales are made (D2T)

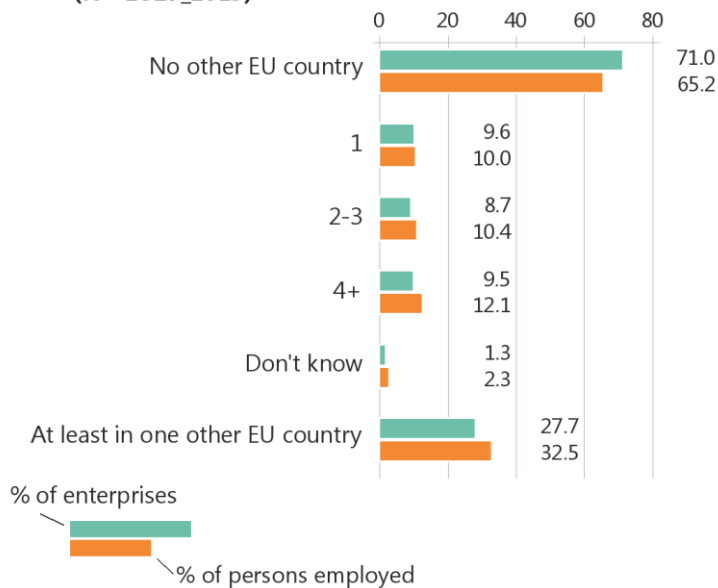
Retailers were asked which countries they sell to when selling to final consumers.

- Most companies only sell to consumers within their own country -

More than seven in ten companies in EU27_2019 (71.0%) **only sell to consumers within their own country** (65.2% of the total person employed) while more than one quarter (27.7%) sell to consumers **in at least one other EU country** (32.5% of the total persons employed).

Looking in more detail, less than one in ten companies in EU27_2019 sell to consumers in one (9.6%), two or three (8.7%), or four or more other EU countries (9.5%).

D2T Besides (OUR COUNTRY), to which EU countries do you currently make cross-border sales to final consumers? A "cross-border sale" is a sale to a final consumer resident in a different EU Member State. This includes online/ telephone/ mail sales, but not sales made in shops. (MULTIPLE ANSWERS POSSIBLE)
(% - EU27_2019)

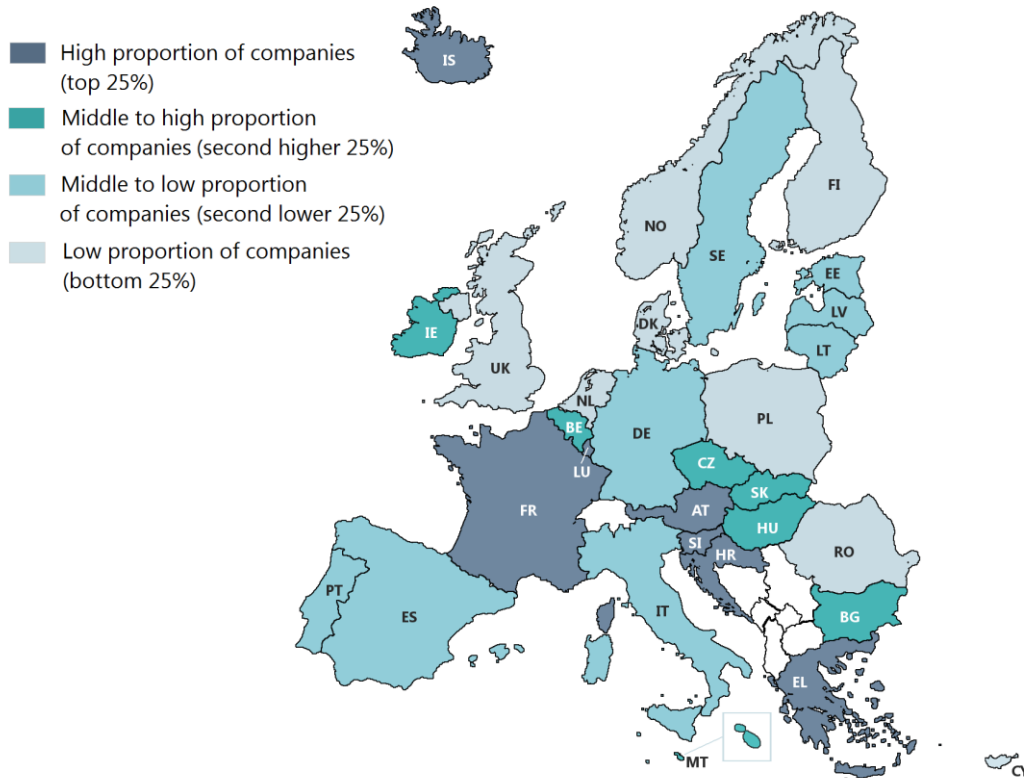


Base: All retailers in EU27_2019 (N=9796)

Companies in the western (29.2%) and southern regions (28.8%) are more likely to sell in at least one other EU country, while those in the north (21.9%) and east (24.0%) are less likely to do so compared to EU27_2019 overall

D2T Besides (OUR COUNTRY), to which EU countries do you currently make cross-border sales to final consumers? A "cross-border sale" is a sale to a final consumer resident in a different EU Member State. This includes online/ telephone/ mail sales, but not sales made in shops. (MULTIPLE ANSWERS POSSIBLE)

(% - AT LEAST IN ONE OTHER EU COUNTRY)



Base: All retailers (N=10747)

Overall, companies in France (49.7%), Greece (45.9%) and Luxembourg (40.8%) are the most likely to **sell to consumers in at least one other EU country**. In contrast, 12.6% in Finland and 13.5% in Poland do the same, although it is retailers outside EU27_2019 in Norway (10.2%) who are the least likely to do this.

Looking at the results in more detail shows that in all but one country, the majority of companies **only sell to consumers in their own country**. More than eight in ten companies in Finland (87.0%), Poland (85.9%) and Romania (81.5%) only sell to domestic consumers. Outside EU27_2019, 89.4% of companies in Norway do so. In contrast, companies in France (49.8%), Greece (53.6%) and Luxembourg (56.8%) are the least likely to only sell to domestic consumers.

There are only eight countries where at least one in ten retailers sell to **one other EU country**, with those in France (27.5%), Austria (15.8%) and Hungary and Slovakia (both 12.6%) the most likely to do so. This compares to 2.8% in Cyprus in EU27_2019, as well as 1.6% in Norway 1.7% in the United Kingdom and 2.5% in Iceland outside EU27_2019.

Just under a quarter of companies in Luxembourg (24.6%) sell to consumers in **two or three other EU countries**, as do 17.2% in Greece and 13.1% in Lithuania and Latvia. Within EU27_2019, companies in Denmark (4.1%) are the least likely to do this, while outside EU27_2019 companies in the UK (3.8%) and Norway (3.1%) are even less likely to sell to 2-3 other countries.

Within EU27_2019, at least one in five companies in Greece (22.9%) and Croatia (20.7%) sell to consumers in **four or more EU countries**, although those in Iceland are even more likely to do this (29.4%). In contrast, less than one in twenty companies in Poland (3.0%) and Finland (3.5%) in EU27_2019, as well as 5.4% in Norway do the same.

At an EU27_2019 level there has been no change since 2016.

At a country level, the largest increase in the proportion of retailers that sell to consumers in **at least one other EU country** is observed in France (+26.8 pp), although the increase in Iceland is almost as large (+21.5 pp) – reversing the trend between 2014-2016. Retailers in Denmark, on the other hand, are now less likely to sell in at least one other EU country (-18.7 pp).

D2T Besides (OUR COUNTRY), to which EU countries do you currently make cross-border sales to final consumers? A “cross-border sale” is a sale to a final consumer resident in a different EU Member State. This includes online/telephone/mail sales, but not sales made in shops. (MULTIPLE ANSWERS POSSIBLE)
(% - AT LEAST IN ONE OTHER EU COUNTRY)

	2018	2018-2016	2016-2014	2014-2012	2012-2011	2011-2010	2010-2009	2009-2008	2008-2006
EU27_2019	27.7	▲ 0.1	▼ 0.4	▲ 2.8	▼ 2.0	▲ 7.6	▼ 4.3	▲ 3.5	▼ 8.5
EU28	25.9	▲ 0.6	▼ 1.0	▲ 2.8	▼ 2.1	▲ 5.3	▼ 3.5	▲ 4.6	▼ 8.2
REGION NORTH	21.9	▲ 0.2	▼ 2.3	▲ 0.2	▼ 7.0	▲ 12.3	▼ 0.8	▼ 2.8	▲ 0.7
REGION SOUTH	28.8	▲ 0.5	▲ 1.9	▲ 3.3	▼ 0.8	▲ 4.4	▲ 1.8	▲ 5.1	▼ 11.4
REGION EAST	24.0	▼ 0.9	▲ 0.3	=	▼ 2.1	▲ 12.5	▼ 6.1	▲ 7.7	▼ 9.9
REGION WEST	29.2	▲ 0.1	▼ 1.6	▲ 4.0	▼ 1.7	▲ 7.1	▼ 8.1	▲ 2.4	▼ 7.4
BE	34.7	▲ 4.6	▼ 5.4	▼ 7.1	▲ 8.8	▲ 7.2	▲ 13.6	▼ 15.5	▼ 5.1
BG	29.6	▲ 2.4	▼ 0.9	▲ 1.6	▼ 4.0	▲ 18.0	▲ 2.4	▲ 4.2	N.A
CZ	31.0	▼ 1.8	▼ 4.5	▲ 1.9	▼ 3.8	▲ 20.5	▼ 9.9	▲ 9.3	▼ 26.5
DK	19.3	▼ 18.7	▲ 9.8	▲ 1.6	▼ 17.5	▲ 19.9	▼ 3.6	▼ 0.4	▲ 5.2
DE	22.9	▼ 6.4	▼ 3.4	▲ 2.1	▲ 0.1	▲ 8.6	▼ 12.8	▲ 3.1	▼ 10.0
EE	23.8	▲ 4.0	▼ 16.2	▲ 1.4	▲ 9.9	▲ 2.1	▼ 9.3	▲ 6.2	▲ 1.2
IE	30.3	▼ 4.6	▲ 3.0	▲ 5.1	▼ 4.7	▲ 8.6	▼ 13.4	▲ 15.0	▼ 5.5
EL	45.9	▲ 7.3	▲ 1.5	▲ 1.6	▲ 10.7	▼ 1.6	▼ 1.6	▲ 5.6	▼ 1.3
ES	27.3	▲ 1.0	▼ 2.4	▲ 1.2	=	▲ 12.7	▼ 1.6	▲ 1.1	▼ 7.1
FR	49.7	▲ 26.8	▲ 1.3	▲ 9.5	▼ 5.8	▲ 2.4	▼ 6.2	▲ 1.0	▼ 2.1
HR	38.0	▼ 7.1	▲ 5.0	▲ 4.5	N.A	N.A	N.A	N.A	N.A
IT	26.3	▼ 3.9	▲ 7.4	▲ 7.9	▼ 5.8	▼ 4.5	▲ 6.5	▲ 13.1	▼ 19.2
CY	21.6	▼ 6.7	▲ 6.6	▼ 6.1	▲ 0.8	▲ 8.1	▼ 4.3	▲ 6.2	▼ 12.6
LV	24.8	▼ 3.9	▲ 4.2	▼ 3.9	▼ 3.1	▲ 13.7	▲ 5.9	▼ 13.4	▲ 3.2
LT	27.4	▲ 1.9	▼ 1.8	▼ 4.7	▲ 4.4	▲ 6.6	▼ 3.6	▼ 0.3	▼ 6.2
LU	40.8	▼ 0.9	▲ 1.2	▲ 1.8	▼ 6.4	▼ 5.2	▲ 8.2	▲ 0.7	▼ 10.4
HU	30.3	▼ 0.2	▲ 10.7	▼ 9.3	▲ 0.2	▲ 8.8	▲ 2.5	▲ 10.0	▼ 3.7
MT	31.2	▼ 3.5	▲ 2.6	▲ 11.2	▲ 0.3	▼ 2.1	▲ 0.5	▲ 1.3	▼ 21.5
NL	22.2	▼ 7.6	▼ 2.9	▲ 4.5	▼ 2.8	▲ 6.8	▲ 1.8	▲ 2.2	▼ 10.6
AT	39.0	▼ 1.3	▼ 0.2	▲ 5.7	▼ 6.5	▲ 12.1	▼ 10.7	▲ 6.5	▼ 10.3
PL	13.5	▼ 2.1	▼ 1.9	▲ 3.1	▼ 8.3	▲ 13.4	▼ 20.5	▲ 11.4	▲ 1.5
PT	27.9	▲ 6.5	▼ 5.9	▼ 6.6	▲ 8.3	▲ 9.8	▲ 2.0	▼ 5.0	▼ 10.6
RO	17.7	▲ 1.2	▲ 4.4	▼ 2.9	▲ 4.7	▲ 4.1	▲ 0.7	▲ 5.2	N.A
SI	40.2	▼ 7.0	▼ 5.4	▲ 12.9	▼ 6.8	▲ 20.9	▼ 6.0	▼ 2.9	▼ 3.2
SK	32.2	▼ 0.4	▼ 4.9	▼ 0.5	▼ 6.2	▲ 15.1	▲ 1.0	▼ 0.8	▼ 16.2
FI	12.6	▲ 3.6	▼ 7.2	▲ 6.2	▼ 3.6	▲ 4.6	▼ 5.3	▲ 7.7	▼ 9.7
SE	24.6	▲ 10.2	▼ 5.7	▼ 1.1	▼ 5.6	▲ 9.3	▲ 3.9	▼ 7.9	▲ 3.0
IS	38.4	▲ 21.5	▼ 18.9	▲ 20.1	▼ 5.4	▼ 6.4	▼ 1.8	N.A	N.A
NO	10.2	▲ 0.2	▼ 1.4	▲ 7.2	▼ 6.2	▼ 6.0	▼ 2.7	▲ 11.5	▼ 2.6
UK	14.6	▲ 2.6	▼ 2.1	▲ 2.1	▼ 2.6	▼ 10.0	▲ 0.9	▲ 9.0	▼ 7.2

Results statistically significantly higher than EU results (T-test at 95% level)
 Results statistically significantly lower than EU results (T-test at 95% level)
 Statistically significant increase from one year to the other (T-test at 95% level)
 Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

The largest increase in the proportion of retailers that **only sell in their own country** is observed amongst retailers in Denmark (+18.3 pp), while the largest decrease is seen amongst those in France (-26.7 pp).

The biggest increase in the proportion of companies that sell to consumers in **four or more EU countries** can be observed in EU27_2019 in France (+8.1 pp), although the increase is much larger in Iceland (+18.5 pp) if non-EU countries are included. The largest decrease amongst those in Malta (-7.0 pp).

Retailers that sell to consumers in **at least one other EU country** are more likely to be found in the following subgroups:

- o services companies (30.4%), and particularly those in sector H (41.9%), or sector N (36.1%). They are, however, less likely to be in sector L (20.0%) or sector S (13.2%);
- o medium sized retailers: 36.4%;
- o companies engaged in online sales: 42.8%;
- o companies that sell services (31.7%). They are less likely to be companies selling products (24.4%);
- o companies that sell in two (38.2%), three (38.9%), or four or more languages (46.8%);
- o companies where the respondent is a marketing manager (36.3%) or a commercial/sales manager (34.1%).

b) Proportion of cross-border sales to consumers in other EU Member States in the total sales

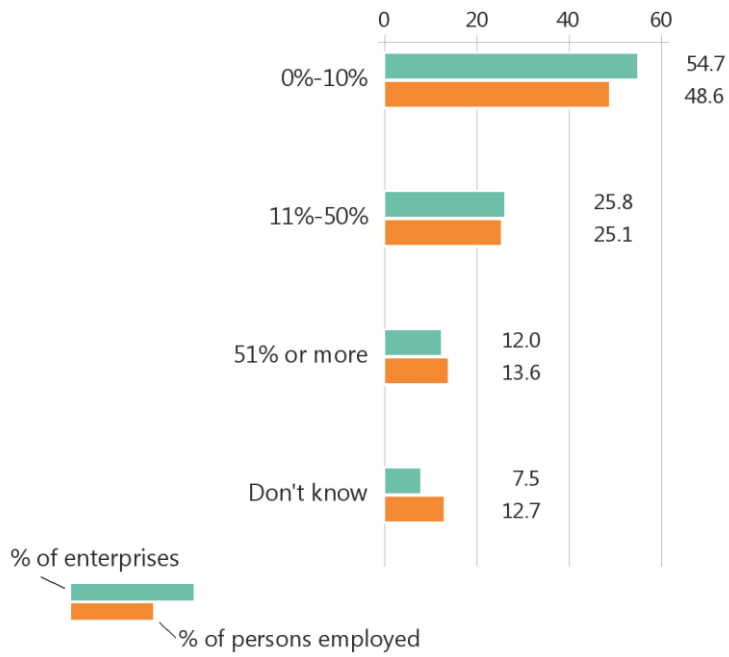
Companies that **currently sell cross-border** were asked to estimate the percentage of their total sales to final consumers that are sales to consumers in other EU Member States.

- Just over half of retailers say 0%-10% of their total sales to final consumers are cross-border sales to other EU Member States -

A small majority of these retailers in EU27_2019 (54.7%) say between 0% and 10% of their total sales to final consumers are cross-border sales to consumers in other EU Member States, representing 48.6% of the total person employed. Just over one quarter (25.8%) say that between 11% and 50% of their total sales to consumers fall into this category, while more than one in ten (12.0%) say 51% or more of their total sales to consumers are cross-border sales to other EU Member States. This represents 25.1% and 13.6% of the total person employed, respectively.

Finally, fewer than one in ten retailers do not know (7.5%).

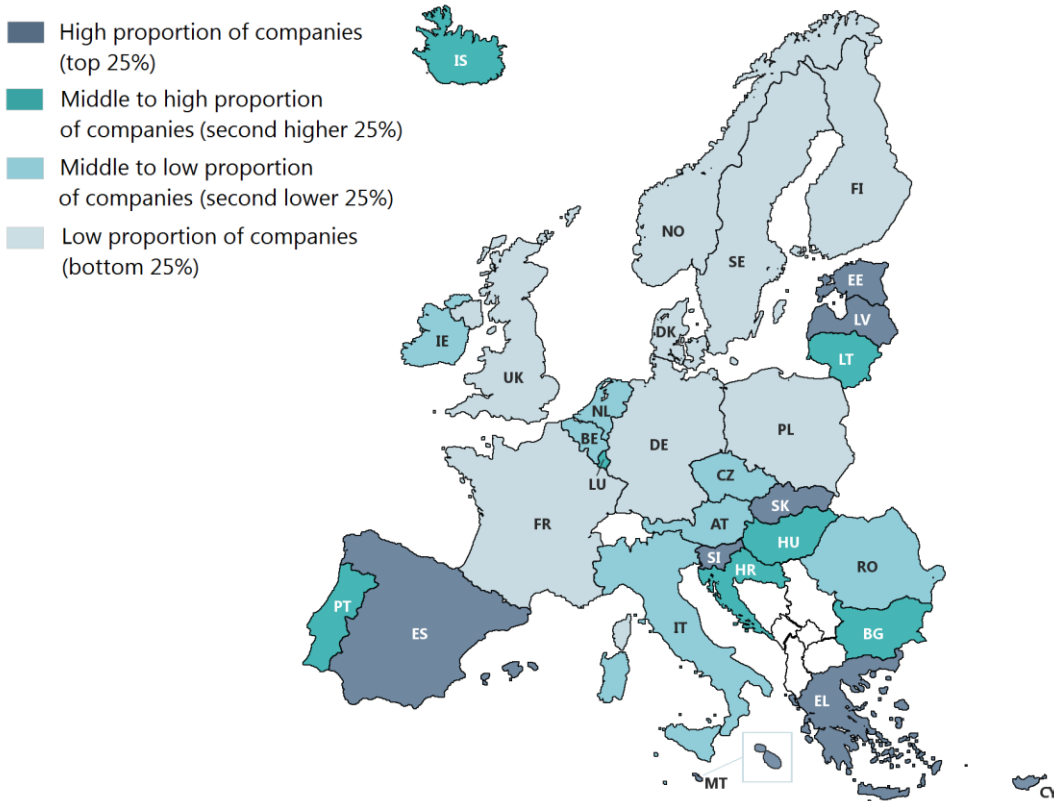
D3T What percentage of your total sales to final consumers are cross-border sales to consumers in other EU Member States?
 (% - EU27_2019)



Base: All retailers in EU27_2019 selling in other EU countries (N=2921)

Retailers in the western region are more likely to say between 0% and 10% of their sales to consumers come from cross border sales (65.2%), while those in the eastern and southern region are more likely to say 11% or more come from cross-border sales, compared to EU27_2019.

D3T What percentage of your total sales to final consumers are cross-border sales to consumers in other EU Member States?
(% - **51% OR MORE**)



Base: All retailers selling in other EU countries (N=3107)

In all but five countries, retailers are most likely to say between 0% and 10% **of their total sales** to final consumers are cross-border sales to other EU Member States²². Those in Germany (71.1%), France (66.7%) and Poland (64.3%) are the most likely to say this, compared to 22.4% in Greece and 24.9% in Romania within EU27_2019, and 18.8% in Iceland.

In Romania (52.5%) and Croatia (36.9%) in EU27_2019, as well as in Iceland (32.7%), retailers are most likely to say 11%-50% of sales to final consumers are cross-border sales to other EU Member States.

²² Results for the following countries are not included in the discussion due to very low sample size: Cyprus (n=16), Norway (n=43), Finland (n=46) and Malta (n=47). Results from the following countries should be interpreted with caution due to low base size: Luxembourg (n=54), Poland (n=57), Romania (n=77), the United Kingdom (n=85), Denmark (n=89), the Czech Republic (n=95) and Estonia (n=99), the Netherlands (n=99).

In Greece, retailers are most likely to say **51% or more** of their total sales to consumers are cross-border sales to other EU Member States (50.0%), and Greece is the only country where more than one third say this, followed by those in Slovenia (30.9%) and Slovakia (29.7%). At the other end of the scale, 2.4% in Germany and 2.6% in Denmark and France say this.

































It is worth noting that the proportion of retailers that **do not know** is high in some countries, for instance in Ireland (27.0%) within EU27_2019, and the United Kingdom (37.8%) and Iceland (22.3%) if considering non-EU countries.





Compared to 2016, companies in EU27_2019 that sell cross-border are now more likely to say **11%-50%** of their total sales to final consumers are cross-border sales to other EU Member States (+2.5 pp), but they are less likely to say **51% or more** of their sales fit this description (-2.4 pp).

Highlights from the country trend results include:

- o Companies in Austria (+15.0 pp) are now more likely to say **0%-10%** of their total sales to final consumers are cross-border sales to other EU Member States, while those in Luxembourg are less likely to do so (-26.6 pp).
- o Companies in Romania (+27.6 pp) are much more likely to say **11%-50%** of their sales fit this description.
- o Companies in Greece (+19.8 pp) are more likely to say **51% or more** of their sales fit this description, while those in Romania are less likely to do so (-16.2 pp).

D3T What percentage of your total sales to final consumers are cross-border sales to consumers in other EU Member States?
(%)

	0%-10%		11%-50%		51% or more		Don't know	
	2018	2018-2016	2018	2018-2016	2018	2018-2016	2018	2018-2016
EU27_2019 	54.7	▲ 1.6	25.8	▲ 2.5	12.0	▼ 2.4	7.5	▼ 1.7
EU28 	52.6	=	26.0	▲ 3.2	11.1	▼ 2.5	10.3	▼ 0.7
REGION NORTH	53.2	▲ 3.9	26.6	▲ 2.6	10.6	▼ 6.5	9.6	=
REGION EAST	43.1	▼ 0.2	30.6	▲ 3.2	20.0	▼ 1.9	6.3	▼ 1.1
REGION SOUTH	36.8	▼ 9.3	32.1	▲ 4.4	24.2	▲ 4.3	6.9	▲ 0.6
REGION WEST	65.2	▲ 5.7	21.9	▲ 1.8	5.0	▼ 4.5	7.9	▼ 3.0
BE 	45.2	▼ 7.1	28.2	▼ 3.1	12.1	▼ 0.1	14.5	▲ 10.3
BG 	34.9	=	29.2	▼ 1.1	24.9	▼ 3.5	11.0	▲ 4.6
CZ 	62.9	▲ 10.6	22.3	▼ 4.1	13.8	▼ 1.1	1.0	▼ 5.4
DK 	57.2	▲ 7.9	32.3	▲ 4.4	2.6	▼ 8.3	7.9	▼ 4.0
DE 	71.1	▲ 6.6	19.3	▲ 7.2	2.4	▼ 6.3	7.2	▼ 7.5
EE 	37.8	▼ 11.6	21.3	▲ 6.2	29.4	▲ 15.0	11.5	▼ 9.6
IE 	30.5	▼ 13.4	28.8	▼ 9.3	13.7	▲ 4.4	27.0	▲ 18.3
EL 	22.4	▼ 16.6	21.6	▼ 2.3	50.0	▲ 19.8	6.0	▼ 0.9
ES 	38.0	▼ 12.5	27.4	▼ 0.4	28.1	▲ 10.9	6.5	▲ 2.0
FR 	66.7	▲ 11.8	23.8	▼ 10.0	2.6	▲ 0.1	6.9	▼ 1.9
HR 	29.1	▼ 1.7	36.9	▲ 15.3	25.4	▼ 11.6	8.6	▼ 2.0
IT 	41.0	▼ 5.5	42.0	▲ 13.0	9.7	▼ 7.2	7.3	▼ 0.3
CY 	16.3	▼ 15.5	21.3	▲ 2.3	54.5	▲ 9.2	7.9	▲ 4.0
LV 	39.0	▲ 2.9	25.6	▼ 7.8	27.8	▲ 0.1	7.6	▲ 4.8
LT 	31.6	▼ 1.2	28.3	▲ 10.0	21.8	▼ 14.0	18.3	▲ 5.2
LU 	31.7	▼ 26.6	34.4	▲ 13.8	22.2	▲ 2.2	11.7	▲ 10.6
HU 	38.7	▲ 2.8	24.2	▼ 9.8	26.5	▲ 6.7	10.6	▲ 0.3
MT 	15.1	▼ 4.3	29.2	▲ 11.8	42.9	▼ 10.1	12.8	▲ 2.6
NL 	64.0	▲ 4.5	24.8	▼ 2.3	9.0	▼ 1.5	2.2	▼ 0.7
AT 	56.9	▲ 15.0	20.7	▼ 8.4	18.2	▼ 8.5	4.2	▲ 1.9
PL 	64.3	▲ 8.1	24.2	▼ 1.8	8.4	▼ 1.8	3.1	▼ 4.5
PT 	43.7	▲ 7.5	26.2	▼ 2.2	22.3	▼ 4.8	7.8	▼ 0.5
RO 	24.9	▼ 12.0	52.5	▲ 27.6	16.4	▼ 16.2	6.2	▲ 0.6
SI 	40.9	▼ 1.4	24.0	▼ 4.5	30.9	▲ 6.9	4.2	▼ 1.0
SK 	36.6	▼ 6.6	29.1	▲ 2.9	29.7	▲ 4.5	4.6	▼ 0.8
FI 	64.4	▼ 7.9	23.9	▲ 3.8	0.0	▼ 4.6	11.7	▲ 8.7
SE 	64.1	▼ 1.7	25.1	▲ 4.9	4.4	▼ 2.0	6.4	▼ 1.2
IS 	18.8	▲ 1.3	32.7	▲ 1.4	26.2	▼ 10.9	22.3	▲ 8.2
NO 	42.4	▼ 7.8	42.7	▲ 22.2	7.9	▲ 2.6	7.0	▼ 17.0
UK 	32.0	▼ 15.6	28.2	▲ 10.4	2.0	▼ 3.0	37.8	▲ 8.2

-  Results statistically significantly higher than EU results (T-test at 95% level)
-  Results statistically significantly lower than EU results (T-test at 95% level)
-  Statistically significant increase from one year to the other (T-test at 95% level)
-  Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers selling in other EU countries (N=3107)

The **analysis of company characteristics** shows companies selling **between 0% and 10%** of their total consumer sales cross-border to other EU Member States are more likely to:

- o be in the trade sector (78.4%) and less likely to be in the services sector in general (44.0%). The exception is retailers in sector K (66.8%) that are more likely to say this;
- o be companies that sell non-food products: 68.9%;
- o only sell in their own language: 73.4%;
- o be companies where the respondent is the general manager: 58.6%.

Companies saying that **51% or more** of their total consumer sales are cross-border to other EU Member States are more likely to:

- o be services companies (16.7%), and particularly those in sector H (19.2%) and I (19.0%). They are less likely to be trade companies (1.7%);
- o sell services: 14.4%;
- o sell in four or more languages: 24.5%.

5.2. Languages used to sell to final consumers

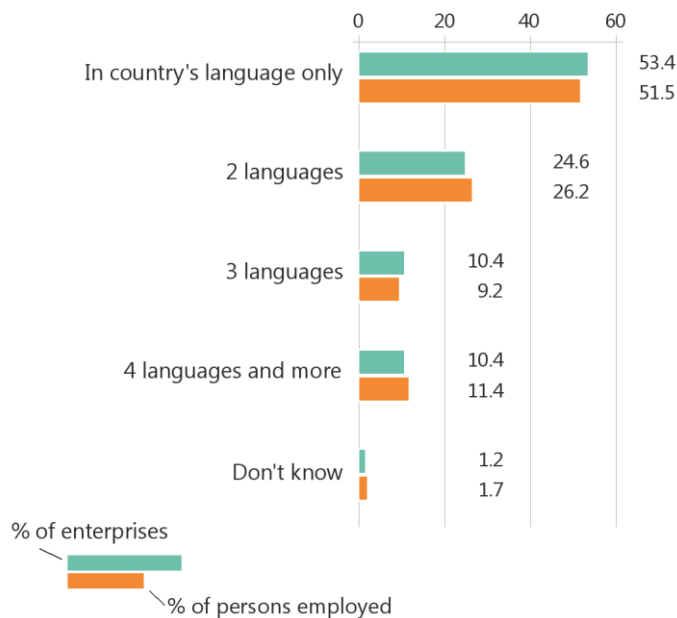
Retailers were asked which languages they use to sell to final consumers.

- The majority of retailers only sell in their own language -

More than half of all retailers in EU27_2017 (53.4%) only sell in their country's language, representing 51.5% of the total persons employed. Almost one quarter of retailers (24.6%) sell in two languages, while one in ten sells in three (10.4%) or in four or more languages (10.4%).

The proportion of persons employed is slightly lower for those selling only in their country's language or in three languages, and slightly higher for those selling in two languages, or in four or more languages.

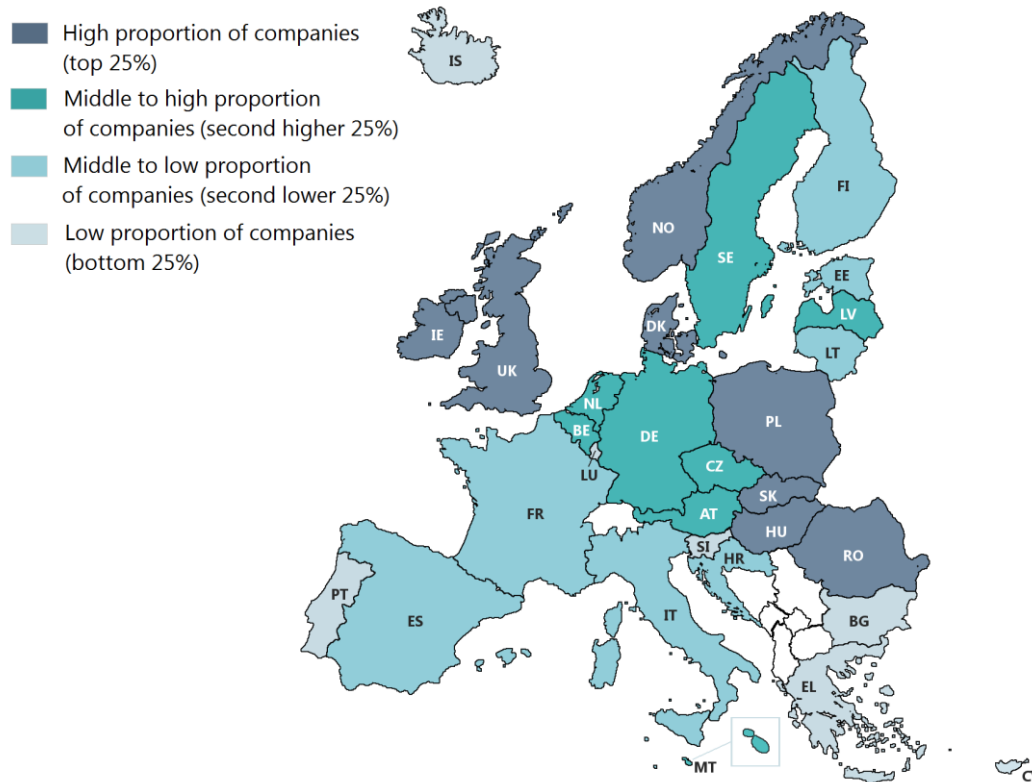
D4T In which languages do you sell to final consumers? (MULTIPLE ANSWERS POSSIBLE)
(% - EU27_2019)



Base: All retailers in EU27_2019 (N=9796)

Retailers in the north are more likely to **sell in two or three languages**, compared to those in EU27_2019 as a whole. Retailers in the south are more likely to **sell in two, three or four languages**, while those in the east are also more likely to **sell in three languages** than those in EU27_2019 overall.

D4T In which languages do you sell to final consumers? (MULTIPLE ANSWERS POSSIBLE)
(% - IN COUNTRY'S LANGUAGE ONLY)



Base: All retailers (N=10747)

In 11 countries, at least half of all companies sell in **their country's language only**. At least eight in ten companies in Ireland (81.5%) only sell in their own language, as do 71.4% of retailers in Hungary. Outside EU27_2019, 80.3% of companies in the United Kingdom only sell in their own language. Companies in Cyprus (9.4%) and Slovenia (22.6%) in EU27_2019, and Iceland (24.8%) outside of EU27_2019 are the least likely to only sell in their own language.

There are three Member States where **two languages** is the most mentioned answer: Cyprus (55.3%), Greece (44.4%) and Luxembourg (44.3%). Outside of EU27_2019 the same applies to Iceland (43.4%). At the other end of the scale 4.4% in Ireland sell in two languages.

At least one in five companies in Lithuania (30.7%), Slovenia (26.1%) and Cyprus (20.9%) sell in **three languages**, compared to 4.7% in Belgium.

Within EU27_2019, companies in Portugal (27.0%) and Slovenia (26.9%) are the most likely to sell in **four languages or more**, as are those outside EU27_2019 in Iceland (19.3%). At the opposite end of the scale, just 2.8% of companies in Belgium and Latvia and 3% in Hungary say the same.

Since 2016, the proportion of companies in EU27_2019 that **only sell in their country's language** has declined (-1.8 pp).

At a country level, companies in Hungary (+16.0 pp) are now more likely to say they **only sell in their own language**, reversing the trend between 2014 and 2016. Retailers in Greece (-18.6 pp) are now less likely to only sell in their own language.

Additionally, there has been an increase of 2.4 points in the proportion of retailers that sell in **at least one other EU language**. At a country level, the largest increase in the proportion selling in at least one other EU language is observed amongst retailers in Greece (+18.5 pp), while the largest decrease is observed amongst those in Hungary (-14.1 pp).

Across EU27_2019, the proportion of companies selling in **four or more languages** has increased by 2.8 points since 2016, reversing the trend between 2014 and 2016. At a country level, the biggest increase is observed in Portugal (+14.1 pp), while the largest decline is recorded amongst retailers in Malta (-7.8 pp).

D4T In which languages do you sell to final consumers? (MULTIPLE ANSWERS POSSIBLE)
 (% - IN COUNTRY'S LANGUAGE ONLY)

	2018	2018-2016	2016-2014	2014-2012	2012-2011	2011-2010	2010-2008	2008-2006
EU27_2019	53.4	▼ 1.8	▲ 2.8	▲ 0.5	▲ 22.2	▼ 11.9	▲ 9.2	▲ 5.0
EU28	57.1	▼ 3.0	▲ 4.0	▼ 0.5	▲ 22.5	▼ 12.6	▲ 5.9	▲ 4.7
REGION NORTH	49.0	▼ 2.5	▼ 1.1	▲ 9.6	▲ 28.6	▼ 24.0	▲ 13.8	▲ 0.4
REGION SOUTH	42.9	▼ 9.2	▼ 1.5	▲ 6.8	▲ 12.0	▼ 13.8	▲ 5.7	▲ 5.5
REGION EAST	59.0	▲ 4.6	▼ 1.4	▲ 6.2	▲ 20.5	▼ 16.0	▲ 13.1	▲ 11.9
REGION WEST	57.3	▼ 0.1	▲ 6.4	▼ 6.5	▲ 27.2	▼ 7.0	▲ 7.8	▲ 3.9
BE	58.0	▼ 0.8	▲ 12.0	▼ 13.0	▲ 26.1	▲ 8.7	▼ 2.1	▲ 5.5
BG	34.7	▼ 4.8	▼ 2.4	▲ 13.1	▲ 1.0	▼ 23.8	▲ 4.3	N.A
CZ	49.2	▲ 1.2	▼ 3.1	▲ 10.2	▲ 24.4	▼ 21.3	▲ 8.3	▲ 10.9
DK	61.2	▲ 3.4	▼ 5.1	▼ 3.9	▲ 55.2	▼ 33.2	▲ 5.7	▲ 6.2
DE	60.6	▲ 3.1	▲ 11.9	▼ 9.1	▲ 29.3	▲ 0.9	▼ 0.9	▲ 11.0
EE	40.2	▼ 4.1	▲ 6.6	▲ 1.3	▲ 23.4	▼ 9.4	▲ 15.5	▼ 10.7
IE	81.5	▼ 4.3	▲ 3.2	▼ 9.1	▲ 12.2	▲ 11.9	▲ 0.4	▼ 4.4
EL	30.5	▼ 18.6	▼ 0.8	▲ 18.8	▲ 7.2	▲ 0.9	▼ 2.8	▲ 10.7
ES	44.4	▼ 14.2	▲ 7.3	▲ 15.7	▲ 0.2	▼ 23.0	▲ 15.0	▼ 3.1
FR	44.3	▼ 13.7	▼ 1.6	▼ 2.0	▲ 23.2	▼ 22.6	▲ 21.9	▼ 1.8
HR	37.4	▲ 6.3	▲ 7.1	▼ 16.0	N.A	N.A	N.A	N.A
IT	47.7	▼ 1.1	▼ 10.5	▼ 0.3	▲ 20.1	▼ 3.3	▼ 2.1	▲ 11.3
CY	9.4	▼ 3.4	▲ 8.4	▼ 3.1	▲ 1.0	▼ 16.5	▼ 16.9	▲ 30.9
LV	48.0	▲ 5.6	▲ 6.6	▼ 3.0	▲ 19.4	▼ 27.4	▲ 25.7	▼ 9.3
LT	37.2	▲ 0.4	▼ 9.5	▲ 4.9	▲ 28.0	▼ 13.5	▼ 2.7	▲ 12.9
LU	25.1	▲ 0.4	▼ 2.2	▼ 4.3	▲ 20.2	▼ 2.0	▲ 5.2	▲ 7.9
HU	71.4	▲ 16.0	▼ 8.4	▲ 11.0	▲ 13.4	▲ 5.6	▼ 4.4	▼ 4.5
MT	59.2	▲ 11.8	▼ 22.7	▲ 1.2	▲ 27.8	▲ 33.5	▼ 5.1	▲ 8.2
NL	54.5	▼ 1.9	▲ 6.2	▼ 5.9	▲ 35.0	▼ 16.4	▲ 16.2	▼ 8.5
AT	48.3	▲ 10.9	▼ 8.6	▲ 1.9	▲ 28.7	▼ 11.1	▲ 5.4	▲ 7.5
PL	68.4	▲ 2.1	▼ 2.9	▼ 4.2	▲ 45.9	▼ 27.5	▲ 28.4	▲ 10.9
PT	30.7	▼ 12.5	▲ 7.5	▼ 7.3	▲ 29.3	▼ 30.3	▲ 5.3	▲ 14.5
RO	68.9	▲ 8.6	▲ 0.9	▲ 14.8	▲ 2.6	▼ 8.6	▲ 12.1	N.A
SI	22.6	▼ 6.6	▼ 17.5	▲ 2.3	▲ 28.5	▼ 23.2	▲ 6.7	▲ 1.7
SK	62.0	▲ 3.3	▲ 9.2	▲ 3.2	▲ 32.6	▼ 17.5	▲ 12.4	▼ 0.9
FI	44.7	▼ 12.5	▲ 8.8	▲ 0.1	▲ 34.7	▼ 1.2	▲ 2.0	▲ 1.3
SE	50.5	▼ 6.9	▼ 0.4	▲ 40.1	▼ 4.7	▼ 29.6	▲ 23.6	▲ 0.9
IS	24.8	▲ 9.8	▼ 6.0	▲ 9.1	▲ 1.1	▼ 24.7	N.A	N.A
NO	61.8	▲ 2.4	▲ 4.8	▲ 4.7	▲ 22.2	▼ 3.8	▲ 23.5	▼ 3.9
UK	80.3	▼ 8.0	▲ 7.4	▼ 7.4	▲ 24.2	▼ 9.8	▼ 2.3	▲ 6.0

- Results statistically significantly higher than EU results (T-test at 95% level)
- Results statistically significantly lower than EU results (T-test at 95% level)
- Statistically significant increase from one year to the other (T-test at 95% level)
- Statistically significant decrease from one year to the other (T-test at 95% level)

Base: All retailers (N=10747)

The analysis of company characteristics shows that companies that **only sell in their country's language** are more likely:

- o to be in the trade sector (65.1%), or in services sectors S (73.3%), N (69.3%), K (67.1%), L (64.3%) or H (59.2%);
- o have been established in 1990 or earlier;
- o to sell non-food products (59.3%) - they are less likely to sell services (50.3%);
- o not to sell via distance methods: 61.7%;
- o not to sell online: 60.7%;
- o not to be interested in selling online: 62.3%;
- o to say they are not confident to sell online: 62.5%.

ANNEX I: Determinants of Retailers' Performance in Consumer Conditions Indices

Throughout the previous sections a number of indices of retailers' performance regarding **consumer and product safety legislation** have been presented. These indices are part of a larger initiative called the **Consumer Conditions Scoreboard (CCS)** and they are allocated into three pillars:

Knowledge, awareness, trust: Retailers' overall knowledge of consumer rights²³, confidence on online selling, trust in product safety and trust in environmental claims.

Compliance and enforcement: No prevalence of unfair commercial practices, perception of competitors' compliance with consumer legislation, and perception of enforcement of consumer and product safety legislation.

Complaints and dispute resolution: Participation in Alternative Dispute Resolution bodies (ADR).

In the following tables, the relationship between general characteristics of the companies and performance on these indices is shown through univariate analyses of variance. A regression model is built for each of these indices (as dependent variables) based on company characteristics (as independent variables). On the side of the independent variables, the characteristics that are taken into consideration are the **EU region** where the company is based, the **sector** to which it belongs, the **number of persons employed** (grouped in three ranges), the **position of the interview respondent in the company**, whether the company **sells in other language** than the national, the **year in which the company was established** (grouped in three periods) and **engagement in cross-border sales**.

The tables on the following pages present the predicted scores for each of these indices.

²³ Note that, compared to the *Kc_r* variable presented in pages 10 to 14 of this report, the index Retailers' overall knowledge of consumers' rights observed on the following pages is computed from responses to six questions instead of five, and measured always at the individual retailer level.

Calculated values (estimated marginal means) of relative impact on key indicators

	Retailers' overall knowledge of consumer rights (Kc_r)	Confidence in online selling in their country (Q2_r)	Trust in non-food product safety (P1_r)	Trust in environmental claims (P2_r)	Prevalence of UCPS (Unfair Commercial Practices) (CC1_r)	Perception of compliance with consumer legislation (Cc2_r)	Participation in ADR mechanisms (PC5_r)
NACE							
A. Trade	0.554 <i>B</i>	0.681 <i>B</i>		0.859 <i>B</i>	0.733 <i>B</i>		
B. Services	0.495 <i>A</i>	0.630 <i>A</i>		0.827 <i>A</i>	0.785 <i>A</i>		
Languages							
A. Country's language only		0.624 <i>B</i>	0.888 <i>B</i>	0.847 <i>B</i>	0.788 <i>B</i>	0.760 <i>B</i>	0.417 <i>B</i>
B. At least one other EU language		0.733 <i>A</i>	0.847 <i>A</i>	0.818 <i>A</i>	0.738 <i>A</i>	0.731 <i>A</i>	0.449 <i>A</i>
Year of establishment							
A. Before 1990	0.537 <i>C</i>	0.657	0.769 <i>C</i>	0.869	0.745		0.453
B. 1990 - 1999	0.540 <i>C</i>	0.681	0.809	0.859	0.751		0.449
C. 2000 - 2018	0.509 <i>AB</i>	0.676	0.818 <i>A</i>	0.872	0.747		0.427
Company size							
A. 10-49	0.500 <i>B</i>	0.599 <i>C</i>	0.739 <i>B</i>	0.802 <i>B</i>	0.734 <i>B</i>	0.675 <i>B</i>	0.401 <i>B</i>
B. 50-249	0.541 <i>A</i>	0.626 <i>C</i>	0.821 <i>A</i>	0.881 <i>A</i>	0.767 <i>A</i>	0.710 <i>A</i>	0.344 <i>AC</i>
C. 250+	0.534	0.741 <i>AB</i>	0.824	0.846	0.775	0.719	0.469 <i>B</i>
Position in the company							
A. General manager		0.625 <i>C</i>	0.795	0.789 <i>BC</i>	0.730 <i>BC</i>	0.649 <i>BC</i>	0.413
B. Commercial/ Sales manager		0.606 <i>C</i>	0.806	0.858 <i>A</i>	0.761 <i>AC</i>	0.696 <i>AC</i>	0.425
C. Marketing manager		0.717 <i>AB</i>	0.838	0.876 <i>A</i>	0.804 <i>AB</i>	0.758 <i>AB</i>	0.413

* This table presents the estimated marginal means of each variable as well as the other categories with respect to which there is a statistically significant difference (at 95% probability). For example the estimated average for Kc_r for the small enterprises (A) is equal to 0.500 and it is statistically significant different from the medium-sized enterprises (B). Conversely, the figure for large enterprises (C) is not statistically significant different from the one for the remaining two categories.

6.1. EU27_2019 models and results

a. Knowledge, awareness, trust

The overall knowledge retailers in EU27_2019 have of consumer rights was tested with five questions presenting hypothetical marketing strategies to increase sales and asking whether it was **prohibited or not** to do so, and one question about the right to cancel a purchase. Individual binary indices were drawn for each question (Q4b, Q5, Q6.1, Q6.2, Q6.3, and Q6.4); the composite index presented in the table just above measures overall knowledge by tallying the six of them²⁴, at the level of each participating company. Awareness was assessed by asking retailers if they were **aware of Alternative Dispute Resolution bodies** (ADR) (see discussion on T1_r on pages 102 to 106), but this variable is not part of the regression analysis presented in this section. Meanwhile, trust was evaluated on the areas of **product safety** and **environmental claims** (see pages 34 to 40). Retailers were asked questions about their attitudes towards online selling (see pages 126 to 180), while an index measuring **confidence in online selling in their own country** is included in this section.

The composite variable **Retailers' overall knowledge of consumers rights** is computed by counting how many of the six questions the respondent representing the retailer answered correctly. It is analysed with a Poisson regression to identify which of the categories within the independent variables have statistically significantly different scores in the index compared to other categories. Each retailer has a score between 0 and 6 correct answers²⁵.

For this index, company characteristics variables that have a statistically significant impact on the score are sector, year the company was established, and the company size. Companies selling goods (retail trade) score higher than those selling services. Companies established in 1999 or earlier have a statistically significantly higher score than those established between 2000 and 2018, and companies with 50-249 employees have a significantly higher score than those with 10-49 employees.

The index **Confidence in online selling in their own country** is a binary response variable in which companies are either confident or not about selling online to customers in their own country. All company characteristics variables have a statistically significant impact on the score. Assuming all other variables remain unchanged, retailers of goods are statistically significantly more likely to be confident about online selling in their own country than those in the services sector. Retailers that sell in at least one other language than their national language are also more likely to be confident about online sales in their own country. Retailers with 250+ employees are statistically significantly more likely to be confident than companies with fewer employees. There is no difference between companies with 10-49 employees and those with 50-249 employees. Finally,

²⁴ Composite variable Kc_r (Knowledge of consumer rights) is calculated on the base of response to questions Q4b, Q5 and the four items of Q6.

²⁵ However, the predicted scores have been normalized and they therefore range from 0 (no correct answers) to 1 (6 correct answers).

marketing managers are more likely to be confident than general managers or commercial/sales managers²⁶.

Trust in non-food product safety is measured with a binary response index amongst companies selling non-food products. Sector is the only variable that does not have a significant impact. Assuming all other variables remain unchanged, companies that only sell in their national language are significantly more likely to trust non-food product safety than those that sell in at least one other EU language.

Companies established between 2000 and 2018 are more likely to trust than those established before 1990, although no statistically significant difference is observed between the companies established between 1990 and 1999 and companies established earlier or later. In addition, companies with 50-249 employees are significantly more likely to **trust non-food product safety** than those with 10-49 employees. However, there is no difference between either of these groups and companies with 250+ employees.

Trust in environmental claims was also measured for all the interviewed retailers as a binary response index. All variables tested have a significant impact. With remaining characteristics constant, retailers of goods trust environmental claims statistically significantly more than retailers of services. Companies that only sell in their country's language are more likely to trust these claims than those that sell in at least one other language.

Companies with 50-249 employees are significantly more likely to **trust environmental claims** than those with 10-49 employees. However, there is no difference between either of these groups and companies with 250+ employees. Finally, companies where the respondent is a general manager are significantly less likely to trust these claims than those where the respondents is a commercial/sales manager or a marketing manager. However, there is no significant difference between the latter two groups.

b. Compliance and enforcement

Retailers' experience with compliance and enforcement of consumer legislation was examined through three sets of questions. The first set is oriented to measure prevalence of unfair commercial practices (UCP) and asks for five particular situations as well as a question on any other UCP (see pages 41 to 72). Composite variable **No prevalence of UCPS** measures the likelihood of **not having faced any** of the six situations as a score from zero to six (computed as the inverse of the sum of positive responses)²⁷.

²⁶ The categories in the "position in the company" variable refer to the person who replied to the questions within the companies interviewed, not to persons with different positions within the same company.

²⁷ After normalisation, the estimated score ranges from 0 (having experienced all the UCPS) to 1 (not having experienced any of the UCPS).

The second set enquires about the **Perception of compliance of consumer legislation in the domestic market** (see pages 73 to 84) and is measured through another composite variable. The composite variable tallies responses to three questions (Q10.1, Q10.2 and Q10.3). The third set and composite variables are dedicated to **Enforcement of consumer legislation and product safety legislation**²⁸, counting the retailers' agreement with four or five statements on the topic, depending on whether the retailer sells non-food products²⁹.

The predicted scores for **No prevalence of UCPs** show each of the variables being tested has an impact. All other variables being equal, companies that sell services are more likely to report UCPs than those selling goods. Companies selling only in their own language are more likely to come across UCPs in their own country than those selling in at least one other language. Furthermore, retailers employing 20-249 people are significantly more likely to come across UCPs than those with 10-49 employees. Finally, marketing managers are the most likely to come across UCPs, followed by commercial/sales managers and general managers. The difference between each of these groups is statistically significant.

On **Perception of compliance with consumer legislation**, every variable except sector and year of establishment has an impact. The analysis shows that retailers that only sell in their country's language are more likely to believe that their competitors comply with consumer and product safety legislations than those that sell in at least one other language. In addition, retailers with employing 50-249 people are significantly more likely to believe this than those with 10-49 employees. Marketing managers are the most likely to believe this, and are significantly more likely to do so than commercial or sales managers, who in turn are significantly more likely to believe this than general managers.

c. Complaints and dispute resolution

Retailers' experience with complaints and dispute resolution has been evaluated through an index measuring **Participation in ADR mechanisms** (see pages 102 to 106), modelled as a binary response index variable through a logistic regression. The model shows that, with the exception of sector, each variable tested has an impact.

Retailers that sell in at least one other language are more likely to participate than those that only sell in their country's language. Finally, companies with 50-249 employees are significantly less likely to participate in ADR than those with 10-49 or 250+ employees.

²⁸ Composite variable on Enforcement of consumer and product safety legislation is calculated at the company level, although for companies **not selling non-food products**, one of the components is extracted from the aggregated country average for E5_r.

²⁹ Predicted scores for these two variables are also normalized as to range from 0 to 1.

6.2. Regional regressions

The same regression exercises were carried out on a region-by-region basis to see if there are substantial differences in between regions.

Independent variables that have a significant effect on retailers' overall knowledge of consumers rights (Kc_r) – by region

Retailers' overall knowledge of consumer rights (Kc_r)	North	East	South	West
NACE				
A. Trade	0.498 <i>B</i>	0.478 <i>B</i>	0.523 <i>B</i>	0.597 <i>B</i>
B. Services	0.461 <i>A</i>	0.426 <i>A</i>	0.468 <i>A</i>	0.549 <i>A</i>
Countries sell to				
A. Not selling in another EU country				
B. Selling in at least one other EU country				
Languages				
A. Country's language only				
B. At least one other EU language				
Year of establishment				
A. Before 1990	0.527 <i>BC</i>	0.469	0.509	0.580 <i>C</i>
B. 1990 - 1999	0.438 <i>AC</i>	0.462	0.519	0.596 <i>C</i>
C. 2000 - 2018	0.478 <i>AB</i>	0.472	0.492	0.534 <i>AB</i>
Company size				
A. 10-49	0.458 <i>B</i>			0.555 <i>B</i>
B. 50-249	0.496 <i>A</i>			0.617 <i>A</i>
C. 250+	0.484			0.548
Position in the company				
A. General manager		0.426	0.464 <i>C</i>	0.613 <i>C</i>
B. Commercial/ Sales manager		0.462	0.488	0.589 <i>C</i>
C. Marketing manager		0.443	0.540 <i>A</i>	0.501 <i>AB</i>

* The grey cells indicate that the effect of the independent variable on the dependent variable is not significant (p -value > 0,05)

- In each region, retailers involved in trade have significantly greater knowledge of consumers' rights than those in the services sector.
- In the northern region retailers established before 1990 have significantly higher knowledge than companies established later. In the western region retailers established before 1999 have significantly higher knowledge than companies established between 2000 and 2018.
- In the northern and western regions, companies with 50-249 employees have significantly higher knowledge than those with 10-49 employees.
- In the southern region marketing managers have significantly higher knowledge than general managers, while, in the western region, marketing managers have significantly lower knowledge than respondents in other positions.

Confidence to sell online**Independent variables that have a significant effect on retailers' confidence to sell online (Q2_r) – by region**

Confidence in online selling in their country (Q2_r)	North	East	South	West
NACE				
A. Trade	0.893 <i>B</i>		0.775 <i>B</i>	
B. Services	0.816 <i>A</i>		0.671 <i>A</i>	
Countries sell to				
A. Not selling in another EU country	0.756 <i>B</i>	0.417 <i>B</i>	0.546 <i>B</i>	0.557 <i>B</i>
B. Selling in at least one other EU country	0.853 <i>A</i>	0.555 <i>A</i>	0.760 <i>A</i>	0.793 <i>A</i>
Languages				
A. Country's language only	0.790 <i>B</i>	0.456 <i>B</i>	0.617 <i>B</i>	0.677 <i>B</i>
B. At least one other EU language	0.893 <i>A</i>	0.557 <i>A</i>	0.781 <i>A</i>	0.779 <i>A</i>
Year of establishment				
A. Before 1990	0.900 <i>B</i>		0.745	
B. 1990 - 1999	0.805 <i>A</i>		0.767	
C. 2000 - 2018	0.852		0.751	
Company size				
A. 10-49	0.757 <i>BC</i>			
B. 50-249	0.865 <i>A</i>			
C. 250+	0.942 <i>A</i>			
Position in the company				
A. General manager		0.366 <i>BC</i>	0.692	0.654 <i>BC</i>
B. Commercial/ Sales manager		0.486 <i>A</i>	0.789	0.567 <i>AC</i>
C. Marketing manager		0.513 <i>A</i>	0.664	0.895 <i>AB</i>

* The grey cells indicate that the effect of the independent variable on the dependent variable is not significant (p-value > 0,05)

- In the northern and southern regions, retailers in the trade sector are significantly more confident to sell online than those in the services sector.
- In each region, retailers that sell in at least one other EU country are significantly more confident to sell online than those that only sell in their own country.
- In each region, retailers that sell in at least one other EU language are significantly more confident to sell online than those that only sell in their country's language.
- In the northern region, companies with 10-49 employees significantly less confident than those with 50+ employees.
- In the eastern region, general managers are less likely to be confident than those in other positions. In the western region, marketing managers are significantly more likely to be confident than general managers or commercial/sales managers. General managers are also more confident than commercial/sales managers.

Independent variables that have a significant effect on retailers' trust in environmental claims (P2_r) – by region

Trust in environmental claims (P2_r)	North	East	South	West
NACE				
A. Trade	0.800 <i>B</i>	0.640 <i>B</i>	0.839 <i>B</i>	
B. Services	0.735 <i>A</i>	0.589 <i>A</i>	0.755 <i>A</i>	
Countries sell to				
A. Not selling in another EU country				0.730
B. Selling in at least one other EU country				0.771
Languages				
A. Country's language only		0.700 <i>B</i>		
B. At least one other EU language		0.655 <i>A</i>		
Year of establishment				
A. Before 1990	0.826 <i>BC</i>	0.706 <i>BC</i>	0.811	0.881
B. 1990 - 1999	0.677 <i>A</i>	0.621 <i>A</i>	0.862	0.864
C. 2000 - 2018	0.735 <i>A</i>	0.624 <i>A</i>	0.807	0.901
Company size				
A. 10-49				0.762 <i>B</i>
B. 50-249				0.904 <i>A</i>
C. 250+				0.887
Position in the company				
A. General manager		0.539 <i>BC</i>	0.754 <i>C</i>	0.817 <i>B</i>
B. Commercial/ Sales manager		0.642 <i>A</i>	0.757	0.903 <i>A</i>
C. Marketing manager		0.667 <i>A</i>	0.889 <i>A</i>	0.781

* The grey cells indicate that the effect of the independent variable on the dependent variable is not significant (p-value > 0,05)

- Retailers in the northern, eastern and southern regions involved in trade are significantly more likely to trust than those in the services sector.
- In the northern and eastern regions, companies established before 1990 are the most likely to trust these claims.
- In the eastern region, companies that sell only in their native language are more likely to trust than those that sell in at least one other EU language.
- In the eastern region, general managers are significantly less likely to trust than those in other positions. In the southern region, marketing managers are more likely to trust than general managers. In the western region commercial/sales managers are more likely to trust than general managers.
- In the western region, companies with 50-249 employees are significantly more likely to trust these claims than those with 10-49 employees.

Independent variables that have a significant effect on Prevalence of UCPs (Unfair Commercial Practices) (CC1_r)– by region

Prevalence of UCPs (Unfair Commercial Practices) (CC1_r)	North	East	South	West
NACE				
A. Trade	0.767 <i>B</i>	0.683 <i>B</i>	0.701 <i>B</i>	0.761 <i>B</i>
B. Services	0.799 <i>A</i>	0.709 <i>A</i>	0.757 <i>A</i>	0.821 <i>A</i>
Countries sell to				
A. Not selling in another EU country			0.688 <i>B</i>	0.731 <i>B</i>
B. Selling in at least one other EU country			0.747 <i>A</i>	0.771 <i>A</i>
Languages				
A. Country's language only	0.774	0.678 <i>B</i>		0.819 <i>B</i>
B. At least one other EU language	0.747	0.634 <i>A</i>		0.743 <i>A</i>
Year of establishment				
A. Before 1990		0.606 <i>BC</i>	0.713	
B. 1990 - 1999		0.692 <i>A</i>	0.730	
C. 2000 - 2018		0.725 <i>A</i>	0.689	
Company size				
A. 10-49	0.750 <i>B</i>	0.630 <i>C</i>		0.787 <i>B</i>
B. 50-249	0.797 <i>A</i>	0.638 <i>C</i>		0.843 <i>A</i>
C. 250+	0.802	0.820 <i>AB</i>		0.744
Position in the company				
A. General manager		0.662 <i>BC</i>	0.705	
B. Commercial/ Sales manager		0.720 <i>A</i>	0.719	
C. Marketing manager		0.752 <i>A</i>	0.782	

* The grey cells indicate that the effect of the independent variable on the dependent variable is not significant (p-value > 0,05)

- In each region, services companies are more likely to have come across UCPs than those selling goods.
- In the southern and western regions, those selling in at least one other EU country are more likely to have come across UCPs than those only selling domestically.
- In the eastern and western regions, companies selling only in their own language are more likely to report UCPs than those that sell in at least one other EU language.
- In the eastern regions, companies established before 1990 are significantly less likely to report UCPs than those established later.
- In the northern and western regions, companies with 50-249 employees are more likely to have come across UCPs than those with 10-49 employees. In the eastern region, those with 250+ are significantly more likely to report UCPs than smaller companies.
- In the eastern region, general managers are significantly less likely to report UCPs than those in other positions.

Independent variables that have a significant effect on retailers' perception of compliance with consumer legislation (Cc2_r) – by region

Perception of compliance with consumer legislation (Cc2_r)	North	East	South	West
NACE				
A. Trade				
B. Services				
Countries sell to				
A. Not selling in another EU country	0.766			0.652 <i>B</i>
B. Selling in at least one other EU country	0.790			0.722 <i>A</i>
Languages				
A. Country's language only				0.791
B. At least one other EU language				0.765
Year of establishment				
A. Before 1990		0.661 <i>C</i>		
B. 1990 - 1999		0.662		
C. 2000 - 2018		0.681 <i>A</i>		
Company size				
A. 10-49	0.667 <i>B</i>			
B. 50-249	0.771 <i>A</i>			
C. 250+	0.767			
Position in the company				
A. General manager		0.607 <i>C</i>	0.652 <i>C</i>	0.682
B. Commercial/ Sales manager		0.641	0.710	0.707
C. Marketing manager		0.713 <i>A</i>	0.761 <i>A</i>	0.742

* The grey cells indicate that the effect of the independent variable on the dependent variable is not significant (p-value > 0,05)

- In the northern region, companies with 50-249 employees are more likely to believe that their competitors comply with consumer and product safety legislations than those with 10-49 employees.
- In the eastern region, companies established between 2000 and 2018 are more likely to believe this than companies established before 1990.
- In the eastern and southern regions, marketing managers are more likely to believe this than general managers.
- In the western region, companies that sell in at least one other EU country are more likely to believe this than those that only sell domestically.

Independent variables that have a significant effect on retailers' participation in ADR mechanisms (PC5_r) – by region

Participation in ADR mechanisms (PC5_r)	North	East	South	West
NACE				
A. Trade			0.267 <i>B</i>	
B. Services			0.207 <i>A</i>	
Countries sell to				
A. Not selling in another EU country				0.338
B. Selling in at least one other EU country				0.336
Languages				
A. Country's language only			0.222 <i>B</i>	
B. At least one other EU language			0.292 <i>A</i>	
Year of establishment				
A. Before 1990	0.554 <i>BC</i>	0.392	0.272	0.452
B. 1990 - 1999	0.332 <i>A</i>	0.337	0.271	0.482
C. 2000 - 2018	0.353 <i>A</i>	0.352	0.254	0.436
Company size				
A. 10-49	0.328 <i>B</i>			0.351 <i>B</i>
B. 50-249	0.427 <i>A</i>			0.255 <i>AC</i>
C. 250+	0.481			0.592 <i>B</i>
Position in the company				
A. General manager	0.413	0.323		0.422
B. Commercial/ Sales manager	0.382	0.350		0.418
C. Marketing manager	0.347	0.319		0.425

* The grey cells indicate that the effect of the independent variable on the dependent variable is not significant (p-value > 0,05)

- In the northern region, companies established before 1990 are significantly more likely to participate in ADR than those established later.
- In the northern region, companies with 50-249 employees are more likely than those with 10-49 employees to participate.
- In the southern region, companies that sell goods are more likely than those that sell services to participate in ADR.
- In the southern region, companies that sell in at least one other EU language are more likely to participate in ADR than those that only sell in their country's language.
- In the western region, companies with 50-249 employees are significantly less likely than smaller or larger companies to participate in ADR.

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