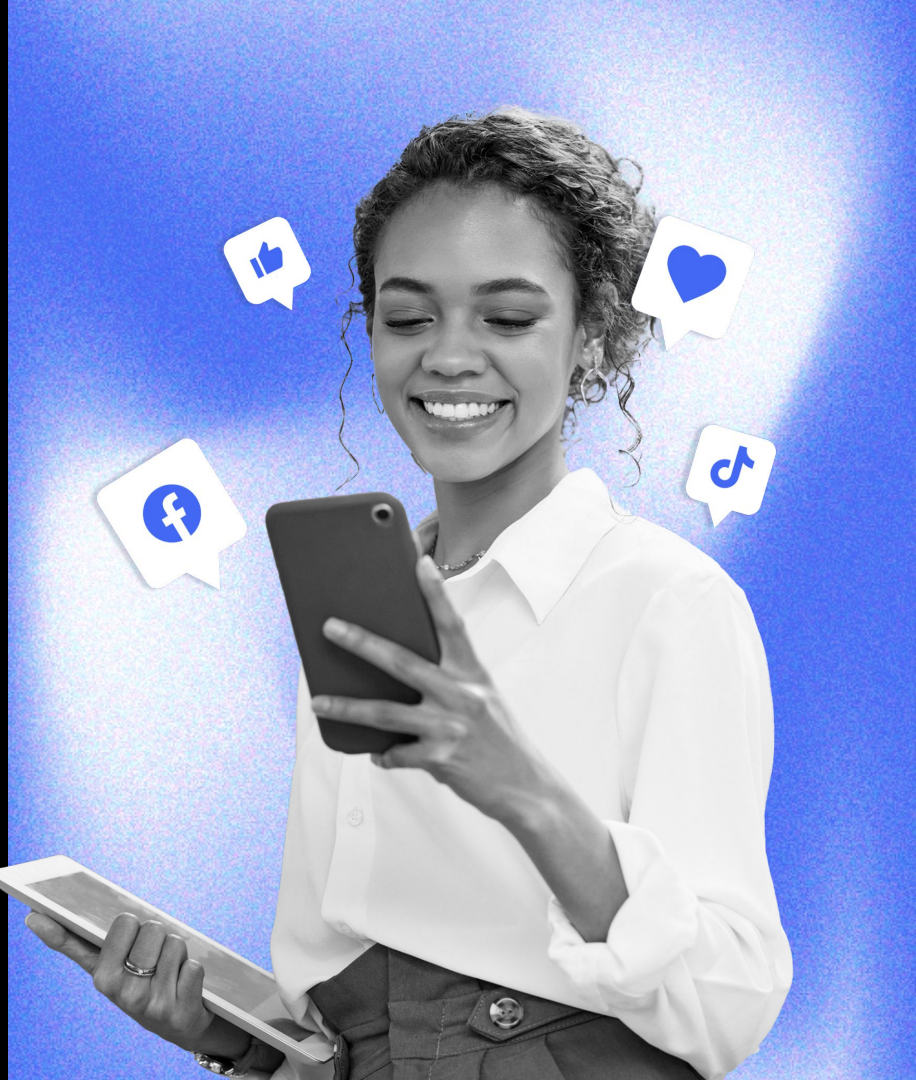
MikMak

State of Social Commerce Report Europe: 2024

From the MikMak Shopping Index



Social commerce in Europe: Slow but steady growth

According to a GWI study, Europe lags slightly behind other regions in social commerce. Only 26 percent of social platform users engage in shopping activities on social media, compared to 39 percent in North America and 30 percent in APAC.

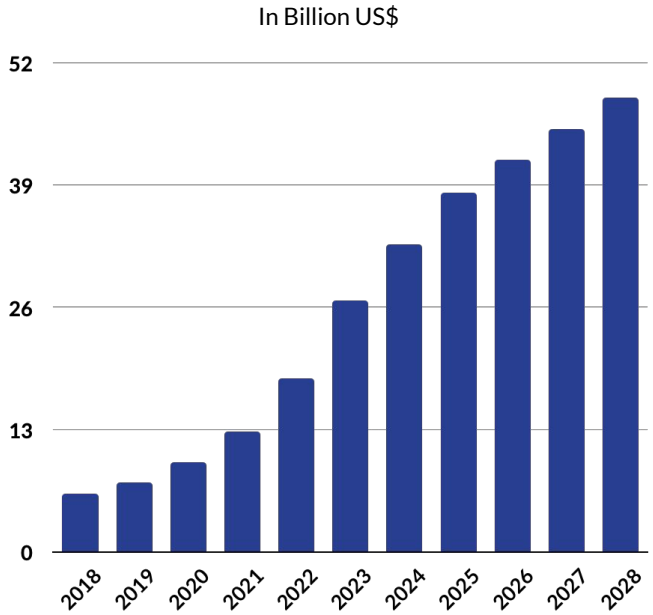
However, since 2021, a constant growth in European social commerce user figures indicates a steady shift in consumer behavior. In 2023, European social commerce revenues amounted to $26.7 billion, and are projected to grow to $48.3 billion by 2028.

The UK has the highest European social commerce revenue, followed by Germany, France, Italy, and Spain.

In terms of European social commerce user numbers, the UK takes the lead, followed by Spain, Germany, and France.

Spain exhibits the fastest growth rate in social commerce users and is projected to surpass the UK to claim the top position by 2027.

Social commerce revenue in Europe, 2018-2028



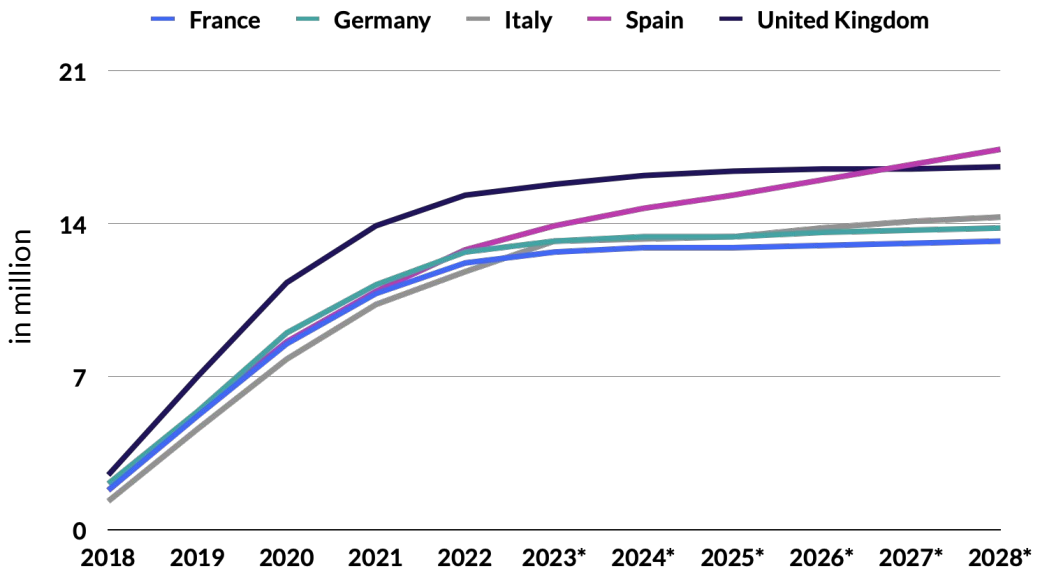
Sources: Statista, ECDB

The European social commerce landscape is marked by diverse legal, cultural, and linguistic specificities. Country-specific legacy retail systems and stringent data protection laws also make European markets challenging for global brands. As a result, a one-size-fits-all approach isn't effective for all European social commerce activities. To succeed, brands must remain agile and adapt their strategies for different countries.

In this report, we will outline guiding social commerce trends and consumer behaviors in key European countries, alongside industry-specific benchmarks and insights from the MikMak Shopping Index.



Number of social commerce users in select European countries, 2018-2028



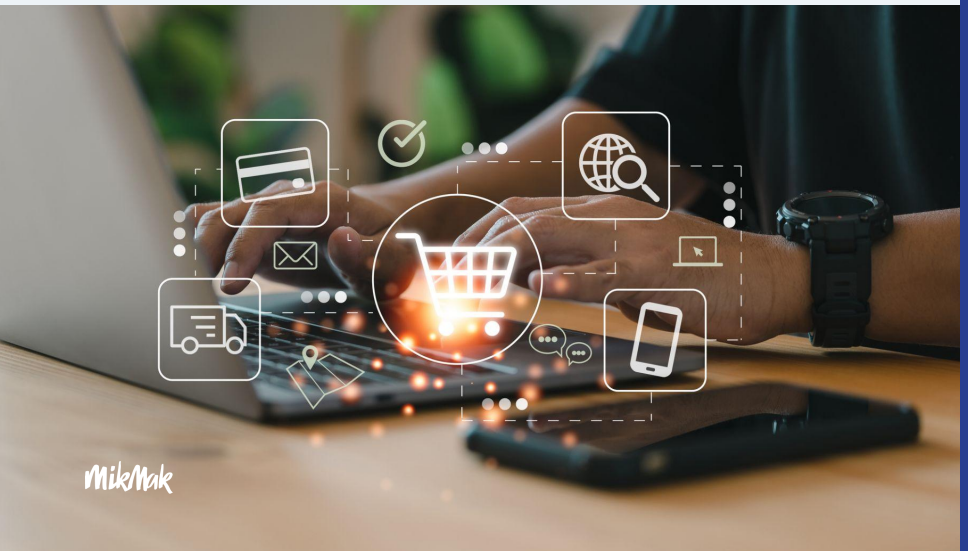
Sources: Statista, ECDB

* Forecast

QUICK REVIEW

What is social commerce?

Social commerce is an eCommerce term that describes shopping experiences that take place on a social media platform. It also includes moments when shoppers click on social media links that direct them to a purchasing option on a retailer's page.



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"The cool thing about eCommerce is that we can be more than just a sales channel. We can be more than just another option for people to buy their products. We can make this way more convenient, and we can explain it better to people. And I think one of the cool things that is also happening is that we can better react to people."

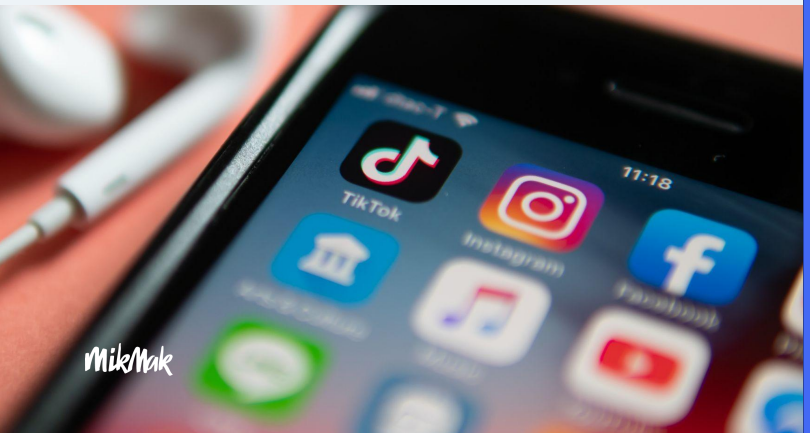


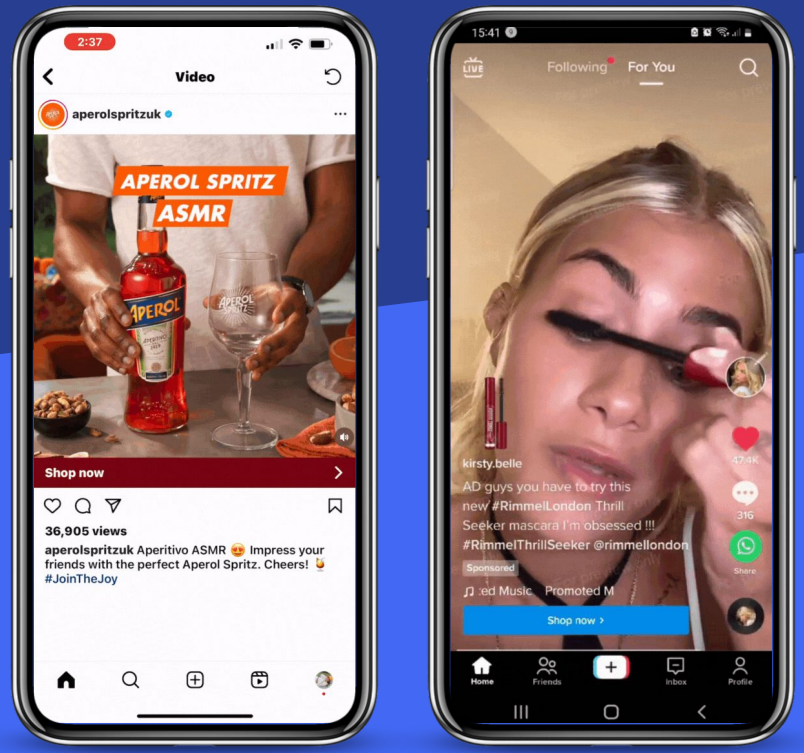
Bas Van Kesteren
Global Head of eCommerce
sanofi

Social commerce trends in the UK, Spain, and France

Given that the UK is the leading social commerce market in Europe, and Spain has the fastest user growth in the region, this report dives deeper into social commerce trends and shopper preferences in these two markets. As an additional comparison point, we also examine trends in France.

The following insights are based on the MikMak Shopping Index and findings from the Digital 2024 Global Overview Report published on DataReportal.

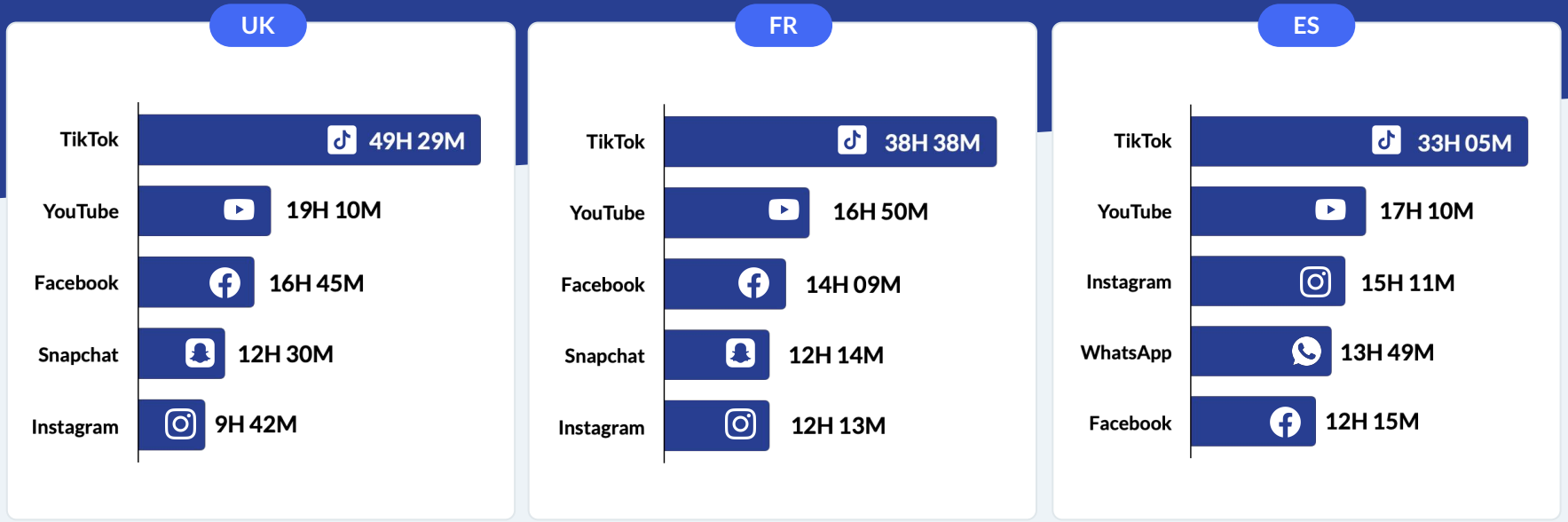




TikTok leads in time spent on social apps, Meta surpasses in user numbers

Considering the significance of social media for brand and product discovery, it's intriguing to observe consumers' time spent on these platforms. TikTok stands out as the most-utilized social media app among users in the UK, Spain, and France. However, Meta platforms reach a larger share of the internet user base.

Top 5 social media apps by monthly time spent

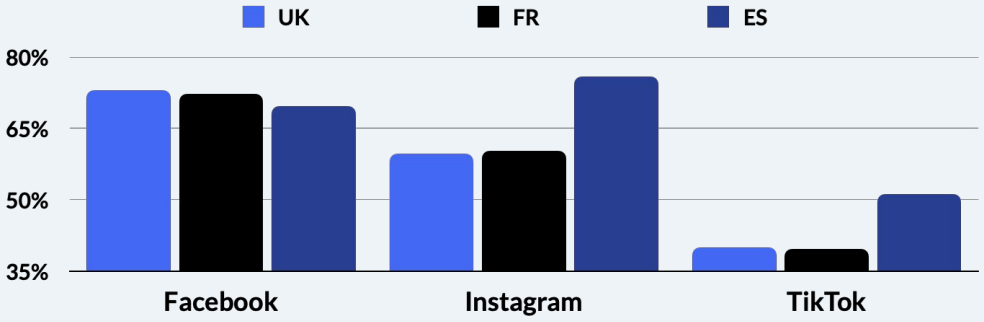


Source: DataReportal, January 2024

In the UK, TikTok is used by 40 percent of internet users aged 16 to 64 years, whereas Facebook reaches 73 percent and Instagram 59.7 percent. Similarly, in France, TikTok's user base is 39.7 percent compared to Facebook's 72.3 percent and Instagram's 60.3 percent. In Spain, TikTok is used by 51.2 percent of internet users, while Instagram is used by 76.9 percent, and Facebook by 69.7 percent.

Determining the best social commerce platforms for a specific brand requires more than just looking at users' time spent. It's essential to consider user profiles and match demographic and psychographic audience data to shopping activity. Monitoring your target audience's behavior, from content viewing to purchases, will help identify where they are most actively engaging with your brand and how your product ads can reach them to increase conversions.

Meta vs TikTok by share of internet users aged 16 to 64 years



Source: DataReportal

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"I would advocate for a full-funnel approach where it's more about the consumer occasions, the moments that you want to connect with those consumers. The more you understand the consumers, the more relevant you can become."



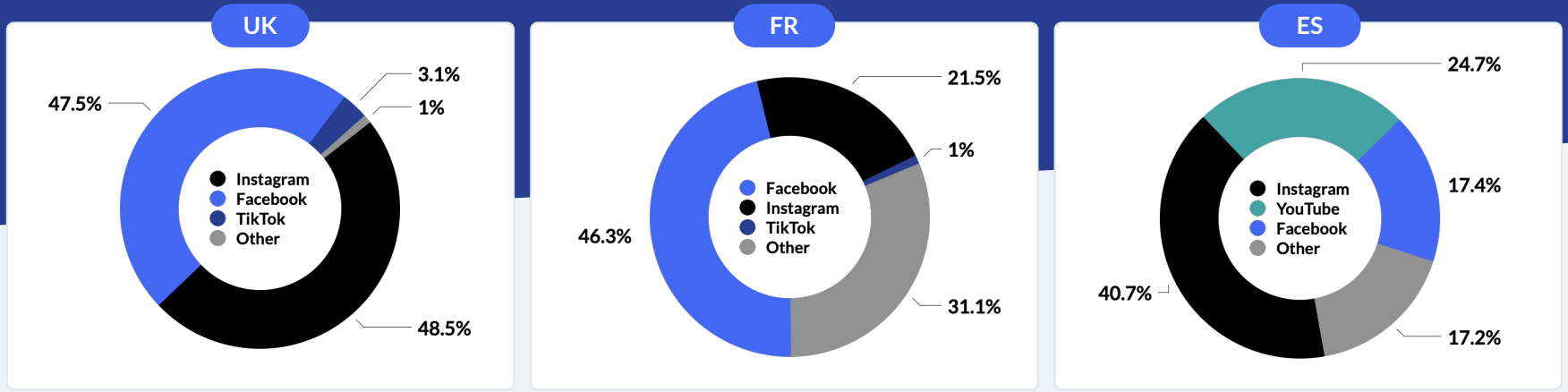
Nuno Pedro
Global Head of the Digital Center of Excellence

MARK ANTHONY BRANDS

Meta platforms dominate social commerce traffic for multichannel brands

The MikMak Shopping Index indicates the dominance of Meta platforms, Facebook and Instagram, in multichannel brands' social commerce across the UK, France, and Spain. Both platforms rank among the top three based on the share of Purchase Intent Clicks* in all three countries. This KPI measures the shopper traffic directed to multichannel brands' retailers through brands' shoppable content on social media.

Instagram leads in the UK and Spain, while Facebook leads in France. YouTube secures the second position in Spain ahead of Facebook, among the top three platforms driving social commerce in the country. In the UK and France, TikTok emerges as a challenger to Meta platforms in overall performance.



Purchase Intent Clicks:

The number of times a shopper has clicked through to at least one retailer during a single session.

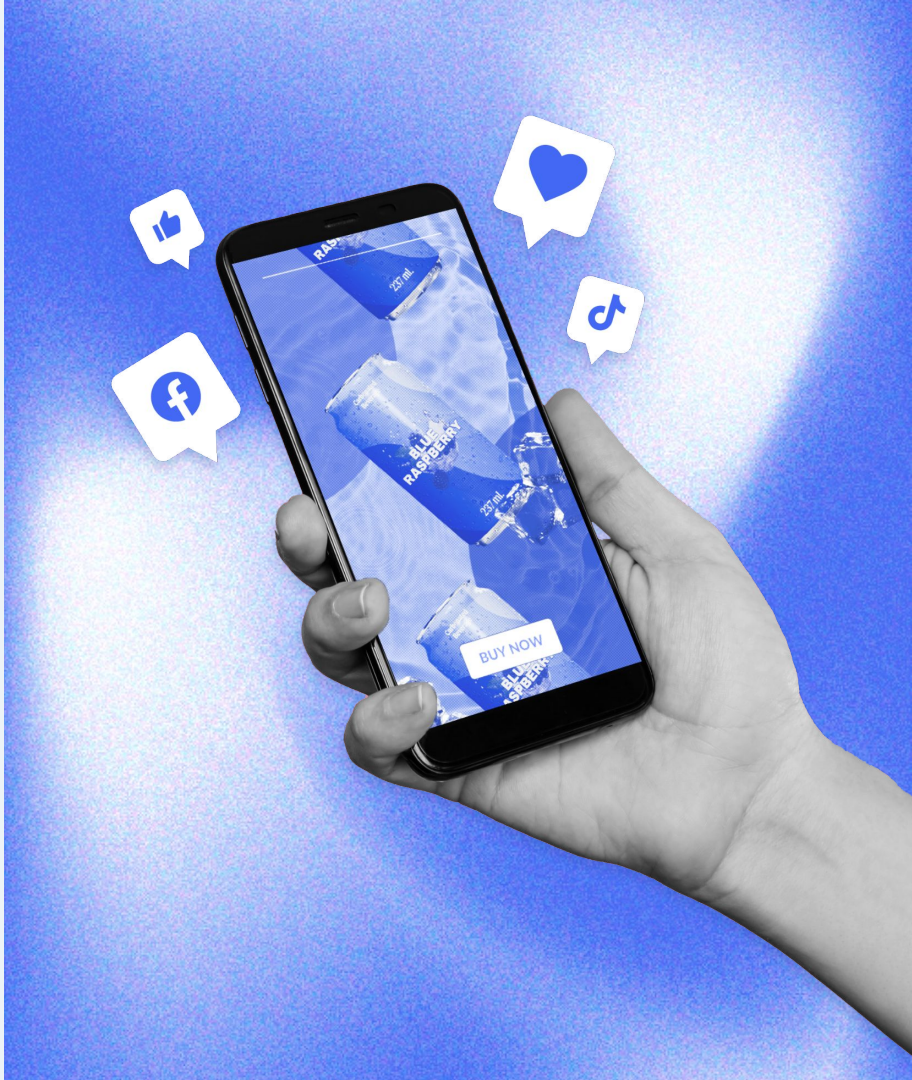
*Source: MikMak Shopping Index, data from 1 April 2023 to 1 April 2024

To observe how these trends manifest in particular sectors and retailer performance, let's explore the Social Commerce trends for multichannel brands within the Beauty, Personal Care, and Grocery sectors.

What works for Beauty, Personal Care, and Grocery social commerce?

When observing sector and retailer-specific performances for Beauty, Personal Care, and Grocery brands, the MikMak Shopping Index reveals variations, compared to the general results by country, as presented earlier in this report.

It is important to note that the Purchase Intent Click performances, which measure in-market shopper traffic, also depend on the investments that brands have decided to make on the different platforms, to drive their visibility and social commerce.



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"I realized along the way that nothing's changed over the past 23 decades, in the sense that you're following a shopper. You're meeting a shopper where they want to engage, where they want to find your products."



Eric Tarnowski
Vice President, Connected Commerce

kenvue



BEAUTY

TikTok emerges for Beauty in the UK, while Meta rules in France and Spain

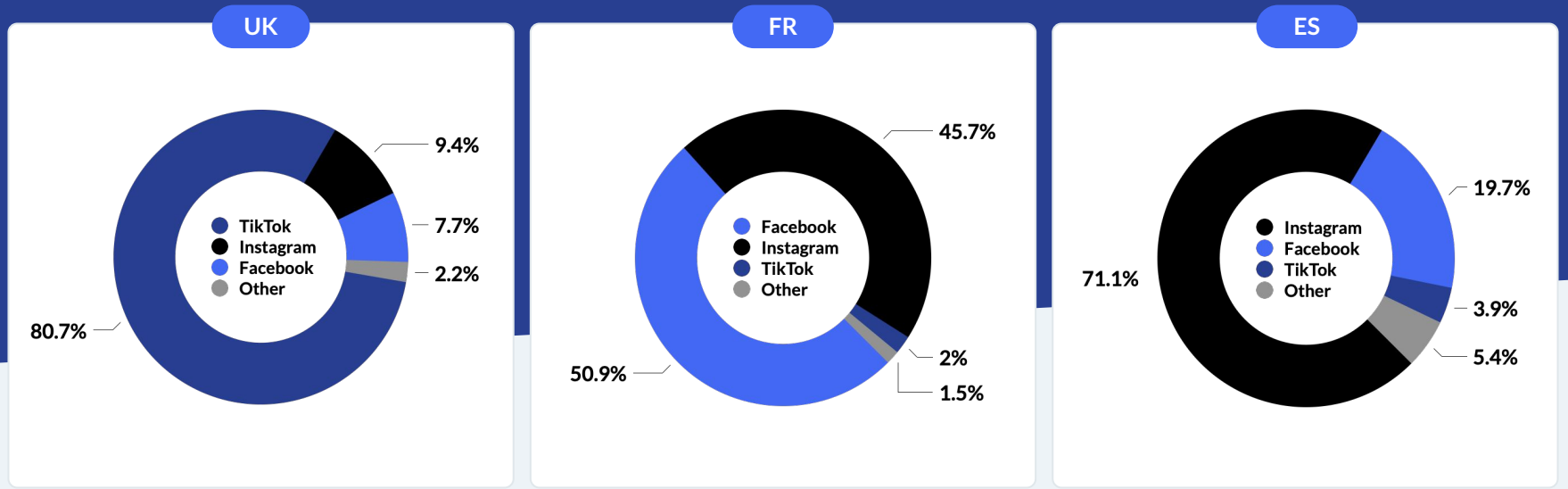
In the UK, TikTok secures the highest share of Purchase Intent Clicks for Beauty brands. Among the top three UK Beauty retailers (by the share of Purchase Intent Clicks), TikTok also holds the first position in driving social commerce traffic for Boots and Superdrug. Conversely, Amazon gains the most traction from Facebook.

In France, Facebook emerges as the leading source of social commerce traffic, dominating the results for all top three Beauty retailers this year. However, there's more competition for the second and third positions among Instagram, TikTok, and YouTube, particularly when analyzing performances for Amazon, Nocibé, and Intermarché.

Meanwhile, in Spain, Instagram currently leads, generating the highest Beauty shopper traffic to brands among social media platforms. Facebook follows in second place, with TikTok in third, although the order varies for top Beauty retailers Amazon, Primor, and Druni. Interestingly, YouTube does not rank among the top three platforms for the Beauty sector, contrary to what was observed in the general country results for Spain earlier.



BEAUTY **Top 3 social commerce platforms:** By share of Purchase Intent Clicks



Instagram Facebook TikTok YouTube Other

MikMak

BEAUTY **Top 3 social commerce platforms by retailer:** By share of Purchase Intent Clicks

UK	Boots 1. TikTok 2. Instagram 3. Facebook	amazon 1. Facebook 2. Instagram 3. Pinterest	Superdrug 1. TikTok 2. YouTube 3. Facebook
FR	amazon 1. Facebook 2. Instagram 3. TikTok	NOCIBÉ 1. Facebook 2. TikTok 3. YouTube	Intermarché 1. Facebook 2. TikTok 3. Instagram
ES	amazon 1. Instagram 2. Facebook 3. TikTok	PRIMOR 1. Instagram 2. TikTok 3. Facebook	DRUNI 1. Instagram 2. Facebook 3. TikTok

PERSONAL CARE

Snapchat and YouTube gain importance for Personal Care retailers

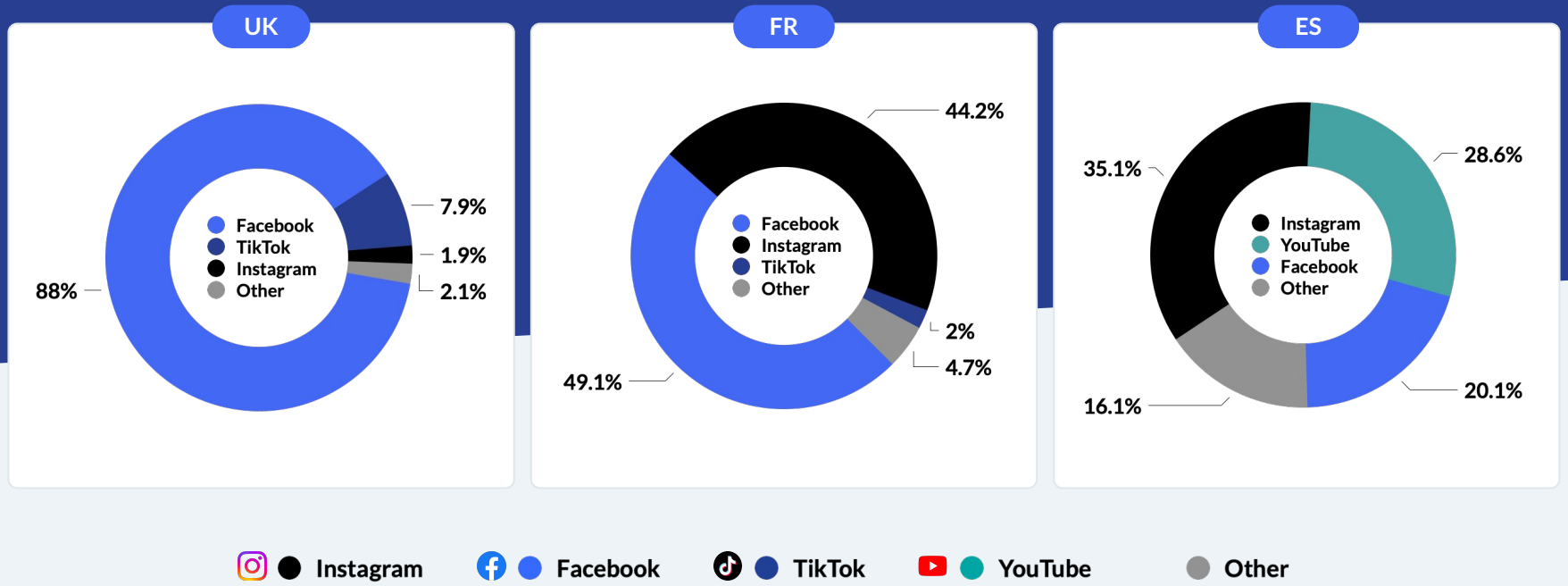
While Meta dominates the lion's share of social commerce traffic in the Personal Care sector, we observe YouTube securing the second position in Spain, and TikTok in the UK, in the top 3 social media platform ranking, by share of Purchase Intent Clicks.

Notably, when examining performances specific to retailers, we also notice Snapchat rising to the first position for Superdrug and claiming third place for Boots in the UK. Additionally, YouTube is making its presence known in the top three rankings for retailers like Cocooncenter in France and Atida in Spain.



PERSONAL CARE

Top 3 social commerce platforms: By share of Purchase Intent Clicks



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PERSONAL CARE

Top 3 social commerce platforms by retailer: By share of Purchase Intent Clicks

UK	Boots 1. TikTok 2. Facebook 3. Snapchat	Superdrug 1. Snapchat 2. Facebook 3. TikTok	TESCO 1. Facebook 2. Instagram 3. TikTok
FR	amazon 1. Facebook 2. Instagram 3. TikTok	Intermarché 1. Facebook 2. TikTok 3. Instagram	Cocooncenter 1. Facebook 2. YouTube 3. Instagram
ES	amazon 1. Instagram 2. Facebook 3. TikTok	PRIMOR 1. Instagram 2. TikTok 3. Facebook	atida 1. Instagram 2. Facebook 3. YouTube

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GROCERY

Meta leads the way in Grocery social commerce

This year, Meta platforms dominate social commerce for multichannel brands in the Grocery sector, driving the most in-market shopper traffic to retailers. Facebook and Instagram collectively represent over 60 percent of Purchase Intent Clicks in Spain, and over 90 percent in the UK and France.

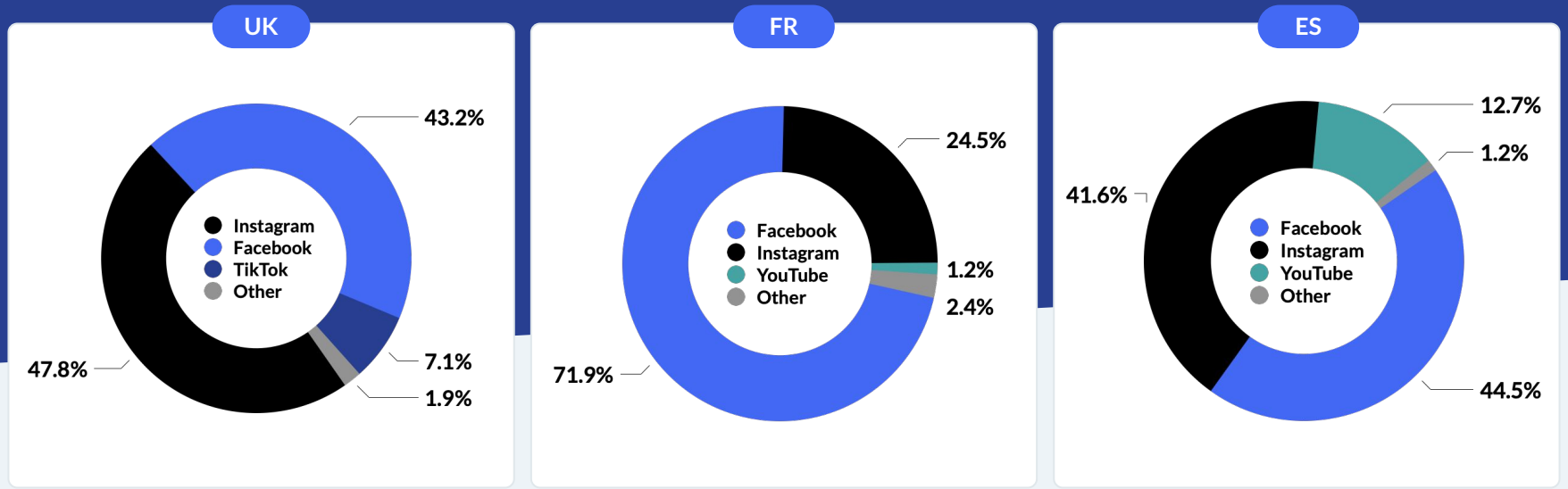
While YouTube and TikTok capture smaller shares, their significance should not be overlooked. In France, YouTube rises to second place in the top 3 ranking for Grocery retailers Intermarché and Carrefour, and ranks third for Amazon. Similarly, in Spain, YouTube holds the third position for El Corte Ingles, Amazon, and Dia.

In the UK, TikTok emerges as a challenger to Meta platforms, ranking as the third most important platform by share of Purchase Intent Clicks for Tesco, Asda, and Sainsbury's.



GROCERY

Top 3 social commerce platforms: By share of Purchase Intent Clicks



Instagram Facebook TikTok YouTube Other

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GROCERY

Top 3 social commerce platforms by retailer: By share of Purchase Intent Clicks

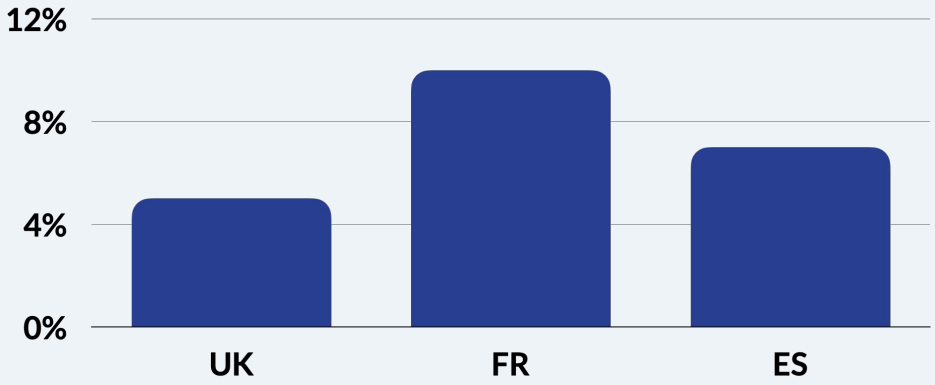
UK	TESCO	1. Instagram 2. Facebook 3. TikTok	ASDA	1. Instagram 2. Facebook 3. TikTok	Sainsbury's	1. Instagram 2. Facebook 3. TikTok
FR	Intermarché	1. Facebook 2. YouTube 3. Instagram	Carrefour drive	1. Facebook 2. YouTube 3. Instagram	amazon	1. Facebook 2. Instagram 3. YouTube
ES	El Corte Inglés	1. Instagram 2. Facebook 3. YouTube	amazon	1. Facebook 2. Instagram 3. YouTube	Dia	1. Facebook 2. Instagram 3. YouTube

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Social commerce peaks at the end of the year, in spring, and early summer

When examining social commerce performances based on the average Purchase Intent Rate*, we currently observe a slightly higher share of audience likely to convert in France (10 percent) compared to the UK (5 percent), and Spain (7 percent).

Average Purchase Intent Rate* on social media



***Purchase Intent Rate:**

The percentage of shoppers who clicked through to at least one retailer

In terms of timing, November and December emerged among the top five months in the UK, France, and Spain in 2023, based on Purchase Intent Rate. These months coincide with numerous brands running social media campaigns for end-of-year festivities and gifting occasions, resulting in heightened user engagement.

In Spain, the last quarter of the year clearly stood out as the best period for social commerce, followed by June and July. In the UK, following December, May and April also ranked among the best-performing months.

Interestingly, in France, spring and early summer proved even more opportune for social commerce than the end of the year. April and March recorded the highest Purchase Intent Rates, with June following closely. These performance peaks are likely influenced in part by Mother's and Father's Day campaigns, as both are celebrated in France in June. Particularly for Beauty and Personal Care brands, Mother's and Father's Day serve as key occasions to drive sales on social media in Europe.

UK	FR	ES
1. December	1. April	1. October
2. May	2. March	2. November
3. April	3. June	3. December
4. November	4. December	4. June
5. February	5. November	5. July
6. January	6. January	6. April
7. July	7. February	7. September
8. March	8. August	8. January
9. August	9. July	9. May
10. October	10. May	10. March
11. September	11. October	11. August
12. June	12. September	12. February

Based on the share of Purchase Intent Clicks, in-market shopper traffic from social media peaks at different times of the week in the UK, France, and Spain. In the UK, activity is highest at the beginning of the week, with Tuesday being the best day. In France, shopper activity peaks towards the end of the week, particularly on Fridays. Interestingly, Sunday sees the highest activity in Spain.

Purchase Intent Rates in social commerce appear to be highest in the middle of the week (from Tuesday to Thursday) in the UK, while in France, they peak right before the weekend (on Thursday and Friday). In Spain, Tuesday stands out as the best day, followed by Sunday, and Saturday.

Best days of the week for social commerce by Purchase Intent Clicks

UK	FR	ES
1. Tuesday	1. Friday	1. Sunday
2. Monday	2. Saturday	2. Saturday
3. Wednesday	3. Sunday	3. Thursday
4. Thursday	4. Wednesday	4. Friday
5. Saturday	5. Thursday	5. Wednesday
6. Friday	6. Monday	6. Tuesday
7. Sunday	7. Tuesday	7. Monday

Best days of the week for social commerce by Purchase Intent Rate

UK	FR	ES
1. Tuesday	1. Friday	1. Tuesday
2. Wednesday	2. Saturday	2. Sunday
3. Thursday	3. Thursday	3. Saturday
4. Friday	4. Wednesday	4. Monday
5. Saturday	5. Sunday	5. Wednesday
6. Monday	6. Monday	6. Thursday
7. Sunday	7. Tuesday	7. Friday

Product discovery happens on social; drive transactions seamlessly with shoppable media

Social media is the third shelf, where product discovery happens. If your brand does not enable commerce in social media interactions, it loses potential sales opportunities.

You don't need to sell directly to consumers to enable social commerce for your brand. Multichannel brands distributing their products via retailers can integrate a 'Where-to-Buy' solution into their social media posts and ads (organic and sponsored content), to accelerate sales. This type of media content with integrated shopping options is called 'shoppable media'.

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"We want to make sure that consumers can advocate for products and brands that we love [...] We use both paid and earned media in partnership with MikMak to truly amplify that storytelling for more consumers out there."



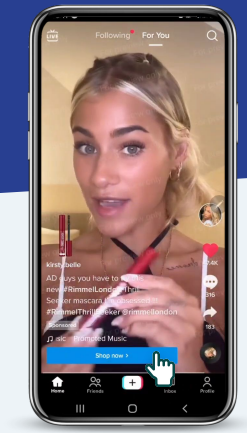
Kevin Shapiro
SVP, US Consumer Beauty Brands

COTY
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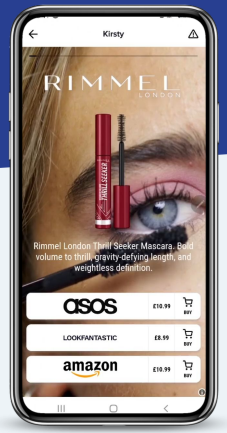
At MikMak, we refer to our ‘shoppable media’ solution as MikMak Commerce for Media, a multi-retailer, eCommerce enablement Where-to-Buy solution for media. It dynamically displays retailers for both online and in-store shopping based on user location and product inventory availability, creating seamless paths to purchase.

By partnering with an eCommerce enablement software like MikMak, you can marry consumer demand with retailer inventory while also collecting invaluable data and analytics on your marketing performance and consumer behaviors and preferences.

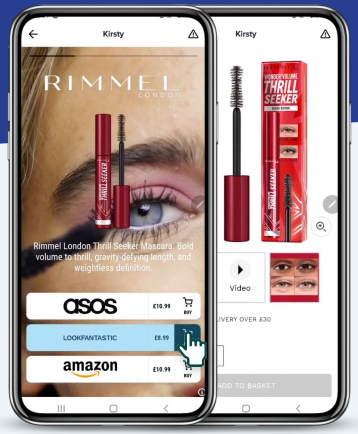
Here’s a brief example of how it works:



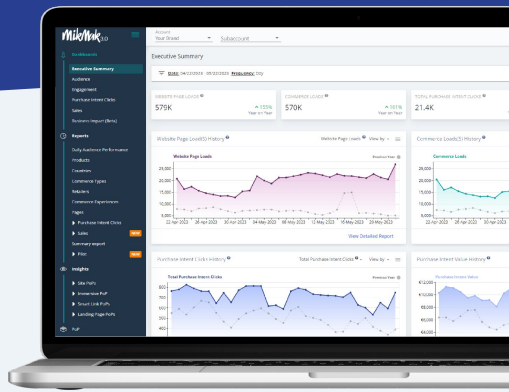
User sees campaign and taps the call-to-action



Online and In-Store (optional) retailer views displayed based on user location



User selects retailer and is sent to Retailer.com PDP or Cart



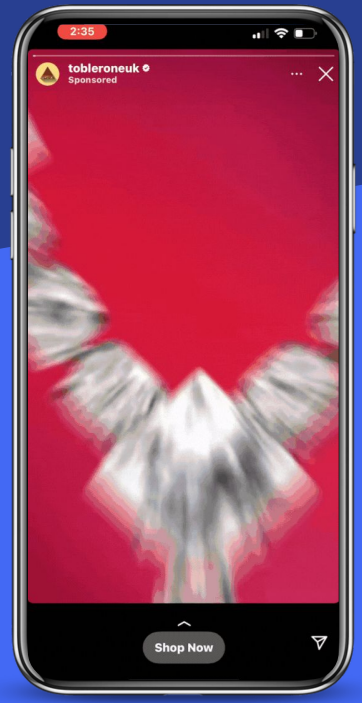
Data from the experience is captured on the MikMak Insights dashboard

MikMak

Best practices for social ads

To ensure your ads resonate with the target audience and achieve marketing objectives, it's essential to address several strategic considerations:

- **Clear Marketing Objective:** Define a clear marketing objective or media key performance indicator (KPI) that aligns with your product or service. Provide the audience with a compelling reason to consider your offering promptly.
- **Relevance to the Audience:** Tailor your creative to be relevant to the specific audience segment targeted in your campaign. Understanding your audience's needs and preferences will enable you to create content that resonates with them effectively.
- **Call to Action:** Incorporate a clear call to action (CTA) in your ad that aligns with your marketing goals. It should be evident to viewers what action they need to take after engaging with your ad.
- **Clear Destination:** Make it clear where viewers can take the desired action. For example, if your product is available in a grocery store, ensure the ad indicates this clearly. Bonus points if you highlight the specific retail partners.
- **Brand Presence:** Your brand should be prominently featured in the creative. Building brand awareness and recognition is crucial for long-term success.



Tactical considerations for different ad types

Different ad formats require specific creative considerations. Here are some tactical tips for feed-based video ads, reels (and story) video ads, and image ads in the feed:

1. Feed-Based Video Ads

Design with sound off in mind.

- Capture attention within the first few seconds
- Showcase your brand early and consistently throughout the video
- Optimize for the 4:5 aspect ratio to maximize screen real estate
- Experiment and try new approaches to engage viewers effectively



2. Reels (and Story) Video Ads:

- Keep it simple and highlight a single benefit or product
- Try unconventional angles or perspectives to make your content stand out
- Use varied layouts and interesting compositions
- Create a focal point in the foreground to guide viewers' attention



3. Image Ads in the Feed

- Consider the mobile best practices
- Tailor the messaging to resonate with the target audience's needs
- Focus on your core products that drive the majority of omnichannel sales
- Pay attention to merchandising to enhance the appeal of your ads



Optimize content based on the right consumer, retailer, and platform insights

- In turbulent economic times, brands must have access to the data that will enable them to understand and prioritize the channels driving the most profitable sales across their media mix. Use data to understand local nuances, adapt strategies accordingly, and analyze your performance across content, channels, influencers, campaign objectives, and retailers. Brands' ability to win is directly correlated to optimizing the path to purchase in real-time.
- Data from social commerce performance should inform your product development, merchandising, sales, and shopper strategies. Don’t look at social media only through the lens of brand marketing; the fastest-growing brands today put the social media team at the center of their organization.
- Social media remains a cost-effective and high-performing commerce channel for brands and retailers alike. Know what social channels matter the most to your shopper audiences, and then test, learn, and scale creative and messaging across those channels with agility and speed. Having a 'hands-on keyboard' mentality matters more than ever in an economic climate like the one we're in now, so the data surrounding social media and social commerce needs to be analyzed and acted upon in real-time, all of the time.



All data and insights from this Social Commerce Report are sourced from the MikMak Shopping Index and additional European industry surveys linked within the guide

The MikMak Shopping Index was developed to provide a standardized set of metrics, methodology, and benchmarks to help drive brands' business results and strategy. It is a collection of key eCommerce KPIs collected across hundreds of brands over 250 channels and more than 7,000+ retailer integrations to understand consumer online shopping behavior.

All MikMak Shopping Index data in this report is from 1 April 2023 to 1 April 2024.

Let's chat!

Want to get even more insights?

Contact marketing@mikmak.com!

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