E-commerce Belgium 2016

comeos
for commerce and services

InSites Consulting
taking research forward

Introduction

How to increase the number of e-consumers?
Our 6th e-commerce study reveals that customers buy more frequently and spend 30% more online than last year. They started with few and low budget purchases, gained confidence over the years, and now go for bigger and more expensive products.

But there is a big challenge for retailers: the number of e-consumers stabilises at only 64% of the Belgian population. How to increase this number? In addition, only 21% of these online buyers have tried using a mobile device for their purchases, 42% would not do it again.

Clearly, there is room for improvement. We hope to see the results of our efforts in the next e-commerce study.

Dominique Michel,
Ceo Comeos

Table of content

Download the full survey on www.comeos.be

Colophon

Editing: Marieke Huion

Responsible editor: Dominique Michel

Graphic design: skinn branding agency · skinn.be

Comeos vzw · E. Van Nieuwenhuyselaan 8 · 1160 Brussel
T 02 788 05 00 · F 02 788 05 01 · **www.comeos.be**

Prepared by:
Pieter De Vuyst, Senior Research Manager, InSites Consulting
Jolien Vanbiervliet, Research Consultant, InSites Consulting
Lien Van Rampelberg, Research Consultant, InSites Consulting

Objectives & methodology

Background

Comeos represents Belgian commerce & services.
Its members are active in 18 sectors and sell to companies or straight to the end-user. Together they represent 11,2% of gdp and employ 400.000 people, which makes them the biggest employer in the private sector. Comeos provides tailor-made services to its members and seeks to serve as a knowledge- and networking-platform to stimulate trade dynamics

Marketing objectives

To get **more insights** in Belgium's e-commerce market and to generate PR-input

Research questions

- What is the online buyer’s profile?
- Which products are bought online?
- Which sectors have the highest potential?

Method

Online questionnaire via Talktochange research community
Fieldwork: March 20th 2016 - April 6nd 2016
Scope: Belgium

Sample

N = 1509

Sample screening

Age: 18-70
Online purchases experience in last 12 months

Sample quota

Region: 60% Dutch , 40% French
Gender: 50% Men, 50% Women
Age: Representative for Belgian population

Used symbols

★	Sig. Higher compared to other group (95%)
↑ ↓	Sig. Higher/lower than the average score of all sectors (95%)

Error margins

n=100	10%
n=400	5%
n=600	4%
n=800	3%
n=1000	3%
n=1500	1%

Comparisons with Comeos 'E-commerce in Belgium 2011, 2012, 2013, 2014 & 2015'

Same period of field (April) and sample composition to optimize comparability.

E-commerce experience

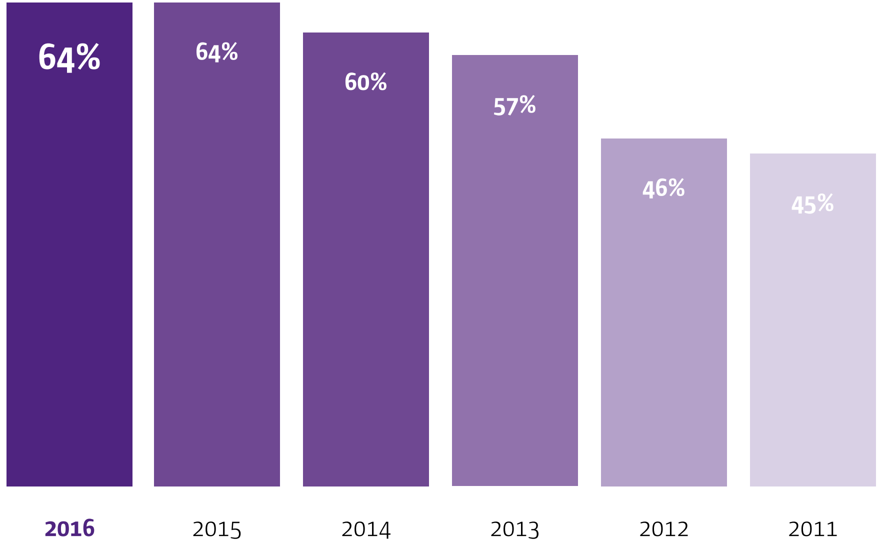
of online population makes online purchases

online buying population stabilises

76%

E-Commerce Experience

LAST YEAR



… of the Belgian population has made an online purchase in the last year, on the internet or via a mobile device through an app or a website.

N=2933 / Filter: Bruto file

E-Commerce Experience

LAST YEAR

Penetration

Q: Did you buy new products or services via the Internet for personal purposes in the past 12 months? We refer to ordering new not second-hand products or services via an e-commerce website of a company (not via e-mail)?

Q: Did you buy products or services on the Internet on a mobile device (e.g. smartphone or tablet) in the past 12 months?

PURCHASED ONLINE LAST YEAR VIA A WEBSITE OR A MOBILE DEVICE (THROUGH AN APP OR A WEBSITE)

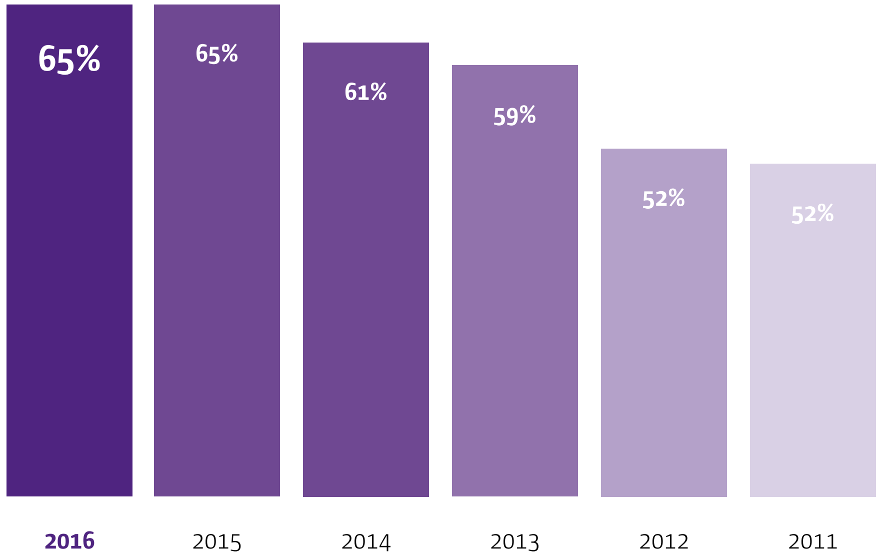
	2016	2015	2014	2013	2012	2011
ONLINE POPULATION	76%	76%	74%	70%	59%	58%
BELGIAN POPULATION*	64%	64%	60%	57%	46%	45%

* Extrapolated to the Belgian population regarding the current internet-population (85% in 2016)

N=2933 / Filter: Bruto file

E-Commerce Experience

EVER



… Of the Belgian population has ever made an online purchase, on the internet or via a mobile device through an app or a website.

E-Commerce Experience

EVER

Penetration

Q: Have you ever bought new products or services via the Internet for personal purposes? We refer to ordering new not second-hand products or services via an e-commerce website of a company (not via e-mail)?

Q: Did you buy new products or services via the Internet for personal purposes in the past 12 months? We refer to ordering new not second-hand products or services via an e-commerce website of a company (not via e-mail)?

Q: Did you buy products or services on the Internet on a mobile device (e.g. smartphone or tablet) in the past 12 months?

	EVER PURCHASED ONLINE VIA A WEBSITE OR A MOBILE APPLICATION						PURCHASED ONLINE LAST YEAR VIA A WEBSITE OR A MOBILE DEVICE					
	2016	**2015**	2014	2013	2012	2011	**2016**	**2015**	2014	2013	2012	2011
ONLINE POPULATION	**77%**	**77%**	75%	75%	67%	66%	**76%**	**76%**	74%	70%	59%	58%
BELGIAN POPULATION*	**65%**	**65%**	61%	59%	52%	52%	**64%**	**64%**	60%	57%	46%	45%

* Extrapolated to the Belgian population regarding the current internet-population (85% in 2016)

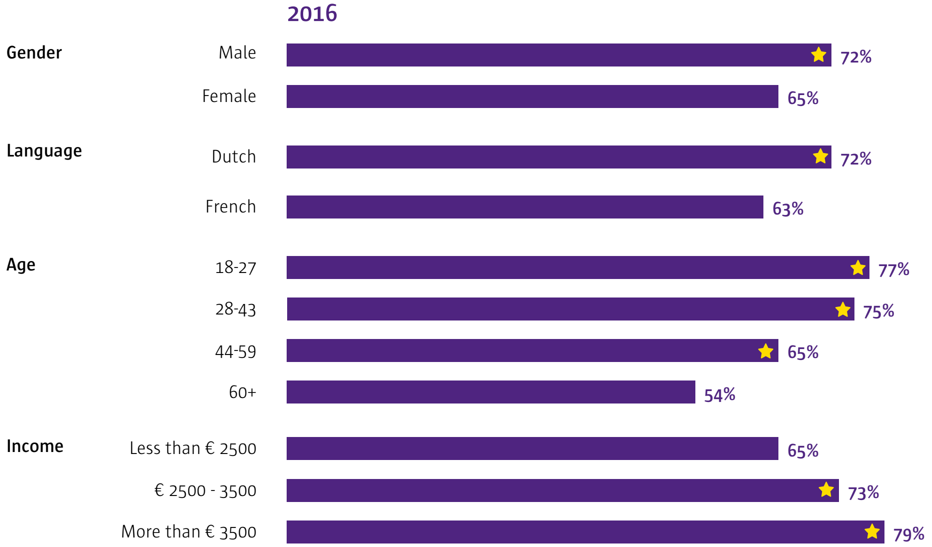
N= 2933 / Filter: Bruto sample

E-Commerce Experience

Profile online buyer: male, young, wealthy

Penetration (profile)

Q: Have you ever bought new products or services via the Internet for personal purposes? We refer to ordering new not second-hand products or services via an e-commerce website of a company not via e-mail.)?



		2016	2015	2014	2013	2012	2011
Gender	Male	★ 72%	68%	65%	62%	55%	56%
	Female	65%	61%	57%	56%	50%	48%
Language	Dutch	★ 72%	68%	64%	61%	56%	53%
	French	63%	59%	56%	55%	48%	46%
Age	18-27	★ 77%	70%	67%	60%	57%	59%
	28-43	★ 75%	70%	66%	62%	59%	58%
	44-59	★ 65%	61%	55%	56%	49%	45%
	60+	54%	55%	53%	55%	42%	43%
Income	Less than € 2500	65%	60%	57%	58%	50%	48%
	€ 2500 - 3500	★ 73%	72%	67%	66%	57%	57%
	More than € 3500	★ 79%	75%	70%	72%	60%	73%

★ Sign. Different from at least one other target group (95% confidence level)

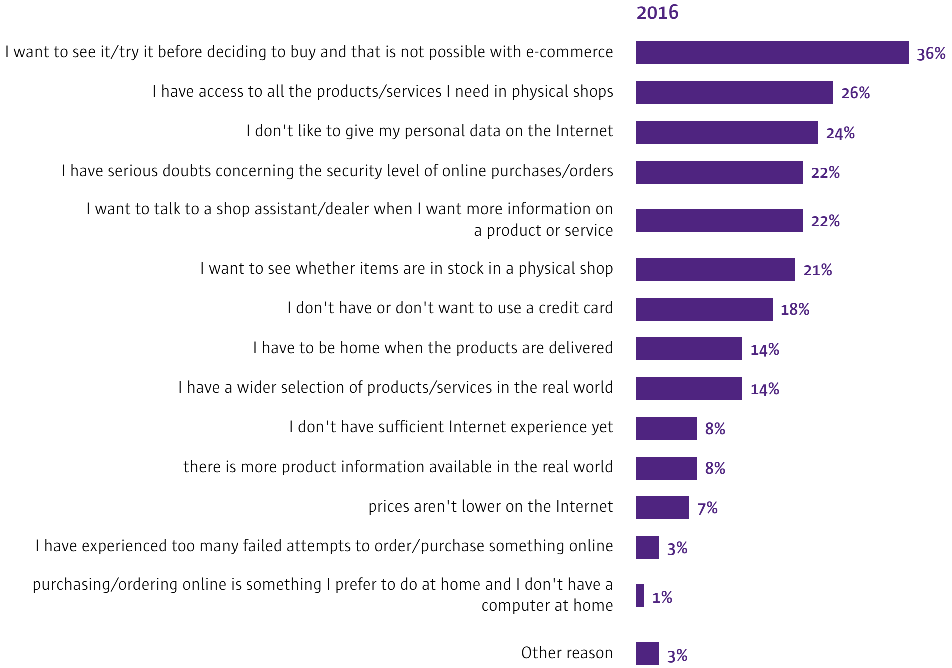
N = 2933 / F = Bruto sample

E-Commerce Experience

See/touch product remains decisive factor

Barriers

Q: What are the 3 main reasons why you did not purchase products or services online?



	2016	2015	2014	2013	2012	2011
I want to see it/try it before deciding to buy and that is not possible with e-commerce	36%	38%	31%	37%	41%	37%
I have access to all the products/services I need in physical shops	26%	26%	19%	17%	23%	23%
I don't like to give my personal data on the Internet	24%	24%	25%	22%	32%	31%
I have serious doubts concerning the security level of online purchases/orders	22%	24%	25%	31%	30%	36%
I want to talk to a shop assistant/dealer when I want more information on a product or service	22%	25%	19%	20%	23%	22%
I want to see whether items are in stock in a physical shop	21%	22%	17%	19%	15%	15%
I don't have or don't want to use a credit card	18%	20%	24%	24%	29%	27%
I have to be home when the products are delivered	14%	13%	14%	19%	16%	16%
I have a wider selection of products/services in the real world	14%	12%	11%	10%	9%	7%
I don't have sufficient Internet experience yet	8%	10%	11%	11%	11%	8%
there is more product information available in the real world	8%	8%	6%	6%	9%	7%
prices aren't lower on the Internet	7%	6%	10%	8%	7%	7%
I have experienced too many failed attempts to order/purchase something online	3%	3%	5%	5%	3%	5%
purchasing/ordering online is something I prefer to do at home and I don't have a computer at home	1%	1%	2%	2%	0%	2%
Other reason	3%	5%	5%	3%	3%	4%

N = 585 / F = Bruto sample; if never purchased online before

Current online shopping behaviour

More frequent buyers:

+2%

monthly purchases

€199

the average amount we spend online per month. That's **€46 more** than last year.

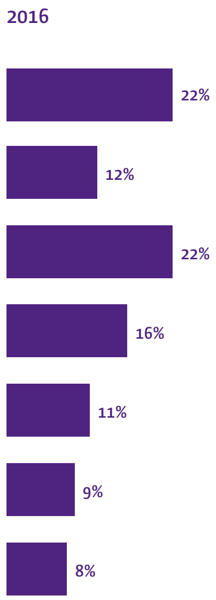
53%

spend more than **€100** a month online

E-Commerce Experience

Experience

Q: When did you first buy something via the Internet (for personal purposes)?



	2016	2015	2014	2013	2012	2011
In the past 12 months	22%	22%	21%	26%	21%	26%
1 to 2 years ago	12%	11%	11%	13%	13%	14%
3 to 4 years ago	22%	23%	23%	23%	22%	24%
5 to 6 years ago	16%	18%	19%	16%	18%	19%
7 to 10 years ago	11%	12%	13%	10%	11%	8%
More than 10 years ago	9%	8%	7%	5%	6%	4%
I do not remember	8%	7%	6%	7%	9%	6%

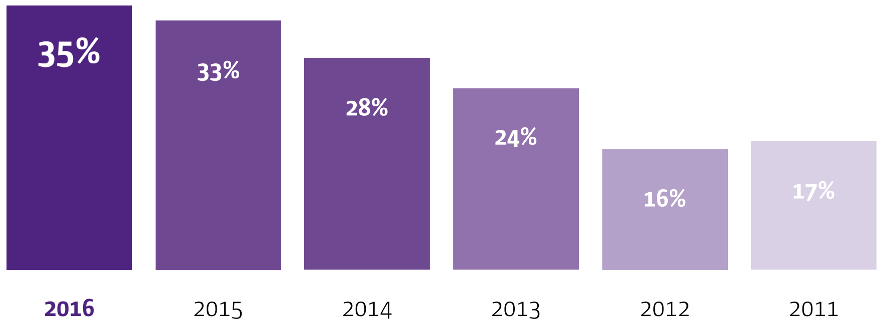
N = 1509 / F = None

E-Commerce Experience

Frequency

Q: How frequently do you buy something via the Internet (for personal purposes)?

AT LEAST MONTHLY PURCHASES



2% more monthly purchases

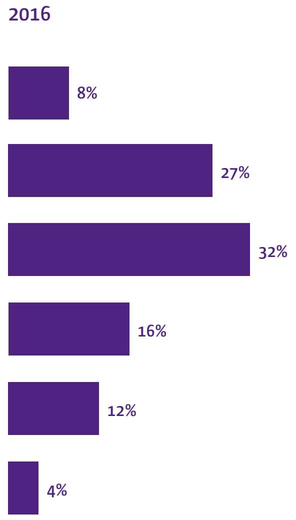
… of the Belgian population has made an online purchase in the last year, on the internet or via a mobile device through an app or a website.

N = 1509 / F = None

E-Commerce Experience

Frequency

Q: How frequently do you buy something via the Internet (for personal purposes)?



	2016	2015	2014	2013	2012	2011
Weekly	8%	6%	5%	4%	2%	2%
Monthly	27%	27%	23%	20%	14%	15%
Every 1 to 3 months	32%	31%	33%	30%	30%	31%
Every 3 to 6 months	16%	18%	20%	23%	24%	22%
Every 6 to 12 months	12%	14%	15%	18%	23%	20%
Less than once a year	4%	5%	4%	6%	7%	10%

Weekly buyers on the rise: +2%

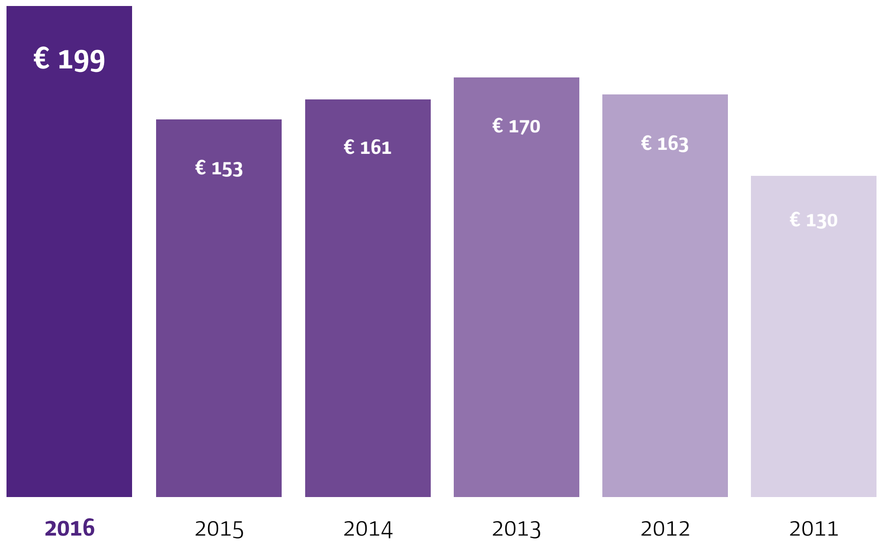
N = 1509 / F = None

E-Commerce Experience

Current online shopping behaviour

Q: How much did you spend online in the past month?

AVERAGE SPENDING PER MONTH



Average spending booms: we now spend 2,388€ a year (+30%)

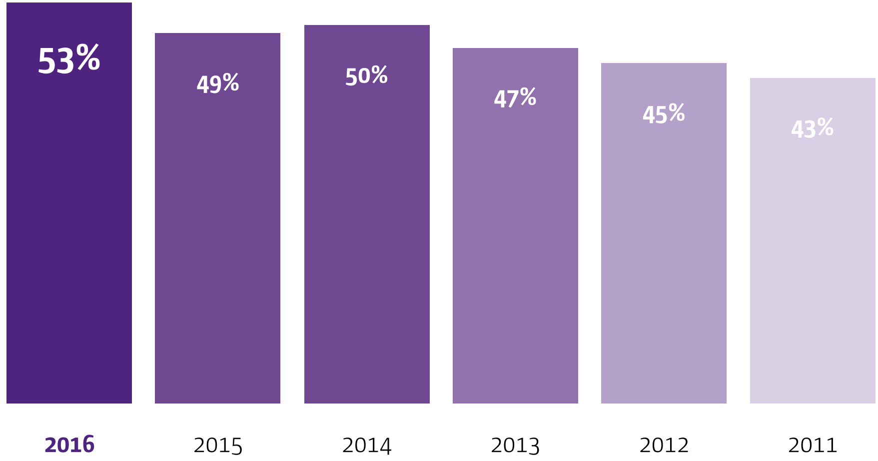
N=1509 / F: None

E-Commerce Experience

Current online shopping behaviour

Q: How much did you spend online in the past month?

MORE THAN € 100 IN THE PAST MONTH



N=1509 / F: None

Number of 'big spenders' increases

E-Commerce Experience

Online purchases: popular for bigger amounts

Current online shopping behaviour

Q: How much did you spend online in the past month?

	2016	2015	2014	2013	2012	2011
Less than €20	12%	14%	13%	16%	26%	19%
Between €20 & €49	16%	14%	16%	17%	10%	16%
Between €50 & €99	19%	23%	21%	20%	19%	22%
Between €100 & €149	15%	18%	17%	12%	13%	13%
More than €150	39%	31%	33%	35%	32%	30%
AVERAGE	€ 199 / month € 2.388 / year	€ 153 / month € 1.837 / year	€ 161 / month € 1.932 / year	€ 170 / month € 2.040 / year	€ 163 / month € 1.944 / year	€ 130 / month € 1.560 / year

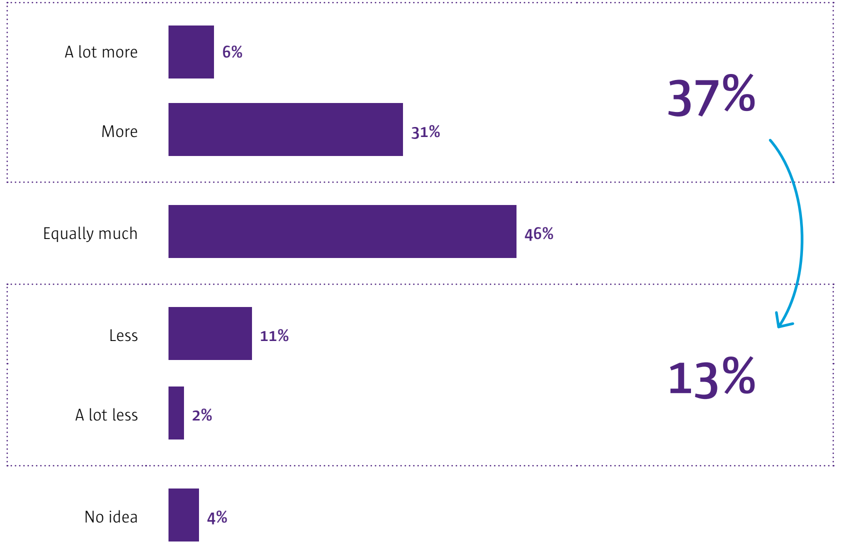
N = 1509 / F = None // data cleaning applied by removing extreme outliers

E-Commerce Experience

Evolution budget

Q: Do you spend less or more now than you did 1 year ago?

SPENDING BEHAVIOUR COMPARED TO LAST YEAR



N=1509 / F: None

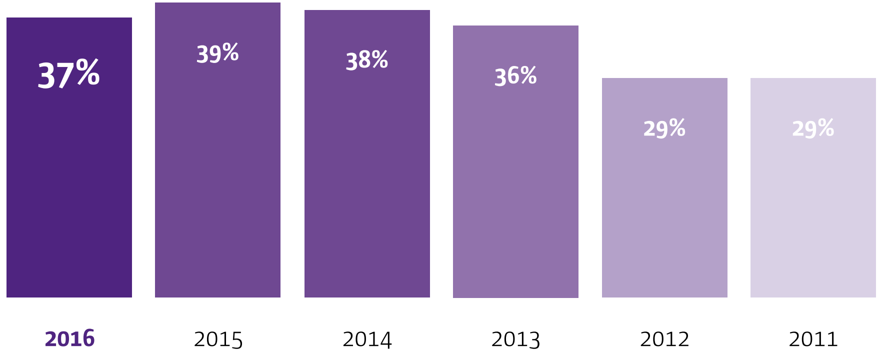
Online buyers tend to spend equally or more than previously

E-Commerce Experience

Evolution budget

Q: Do you spend less or more now than you did 1 year ago?

SPENDING MORE THAN LAST YEAR



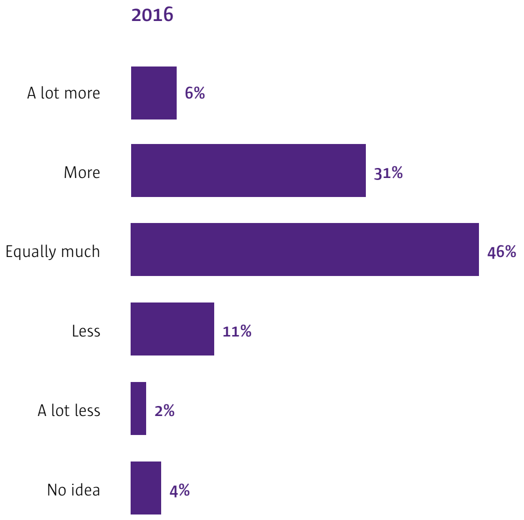
N=1509 / F: None

37% spent more than last year

E-Commerce Experience

Evolution budget

Q: Do you spend less or more now than you did 1 year ago?



	2016	2015	2014	2013	2012	2011
A lot more	6%	5%	5%	4%	2%	3%
More	31%	34%	33%	32%	27%	26%
Equally much	46%	45%	44%	45%	49%	48%
Less	11%	11%	12%	11%	13%	13%
A lot less	2%	2%	2%	3%	3%	2%
No idea	4%	3%	3%	5%	7%	8%

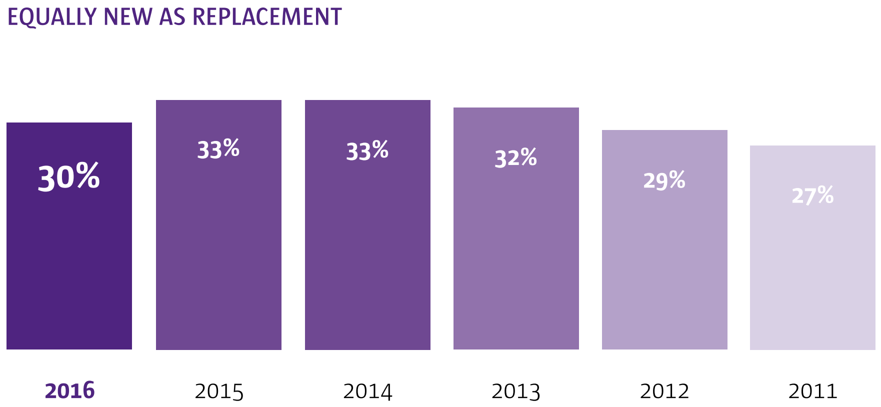
★ Sign. difference (95%)

N = 1509 / F = None

E-Commerce Experience

Substitution offline purchases

Q: To what extent do these purchases via the Internet replace offline purchases?



3 out of 10 online purchases are as often new /extra purchases as replacement of previous offline purchases

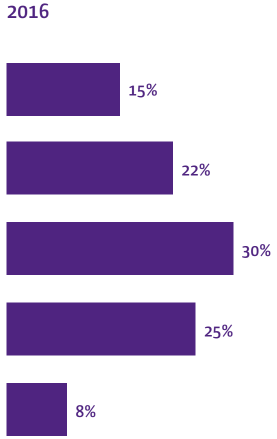
N = 1509 / F = None

E-Commerce Experience

Substitution offline purchases

Q: To what extent do these purchases via the Internet replace offline purchases?

37% of purchases are extra purchases; 33% are replacements of offline purchases



	2016	2015	2014	2013	2012	2011
Not at all, these are new / extra purchases	15%	14%	12%	16%	15%	20%
Not really, these are mainly new / extra purchases	22%	23%	23%	21%	21%	22%
These are as often new / extra purchases as replacement of previous offline purchases	30%	33%	33%	32%	29%	27%
Rather, these are mainly replacements of previous offline purchases	25%	24%	25%	25%	26%	23%
Totally, these are replacements of previous offline purchases	8%	7%	7%	6%	9%	8%

N = 1509 / F = None

Online purchases

-1% Fashion in decline

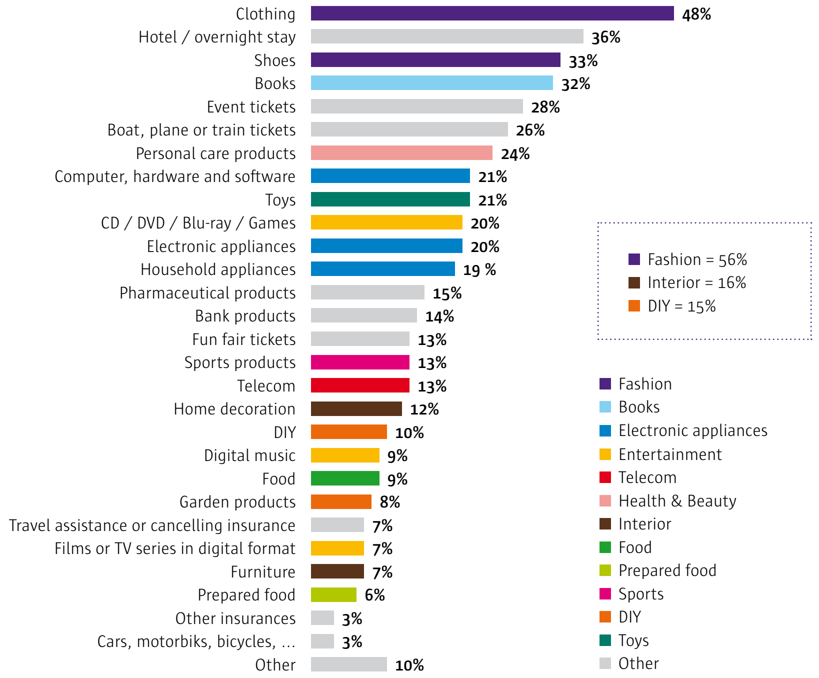
Interior, DIY & Garden on the rise **+5%**

85% of customers will buy again

Online purchases

Current purchase new products

Q: Which new products or services did you buy via the Internet (for personal purposes) in the past 12 months?



Clothing, accommodation and shoes = top 3 volume drivers

N = 1509 / F = None

Online purchases

Current purchase new products • Evolutions

Q: Which new products or services did you buy via the Internet (for personal purposes) in the past 12 months?

	2016	Evolution 2016-2015	Evolution 2016-2011
Clothing / shoes	56%	-1%	+18%
Hotel / overnight stay	36%	-3%	+1%
Books	32%	-1%	+2%
Event tickets	28%	-3%	-6%
Boat, plane or train tickets	26%	-6%	-5%
Personal care products	24%	+2%	+8%
Computer, hardware and software	21%	-2%	-3%
Toys	21%	+3%	+9%
CD / DVD / Blu-ray / Games	20%	-1%	-3%
Electronic appliances	20%	+1%	+2%
Household appliances	19%	+1%	+7%
Furniture and home decoration	16%	+2%	+9%
DIY and garden products	15%	+3%	+9%
Pharmaceutical products	15%	+3%	+9%
Bank products	14%	-4%	N/A
Fun fair tickets	13%	+2%	+3%
Sports products	13%	+3%	+6%
Telecom	13%	-2%	-3%
Digital music	9%	0%	-4%
Food	9%	0%	+2%
Travel assistance or cancellation insurance	7%	0%	N/A
Films or TV series in digital format	7%	+1%	+1%
Prepared food	6%	+3%	+4%
Other insurances	3%	+1%	N/A
Cars, motorbikes, bicycles	3%	0%	+1%
Other	10%	-2%	-6%

Travel tickets (boat, plane, train) decreasing

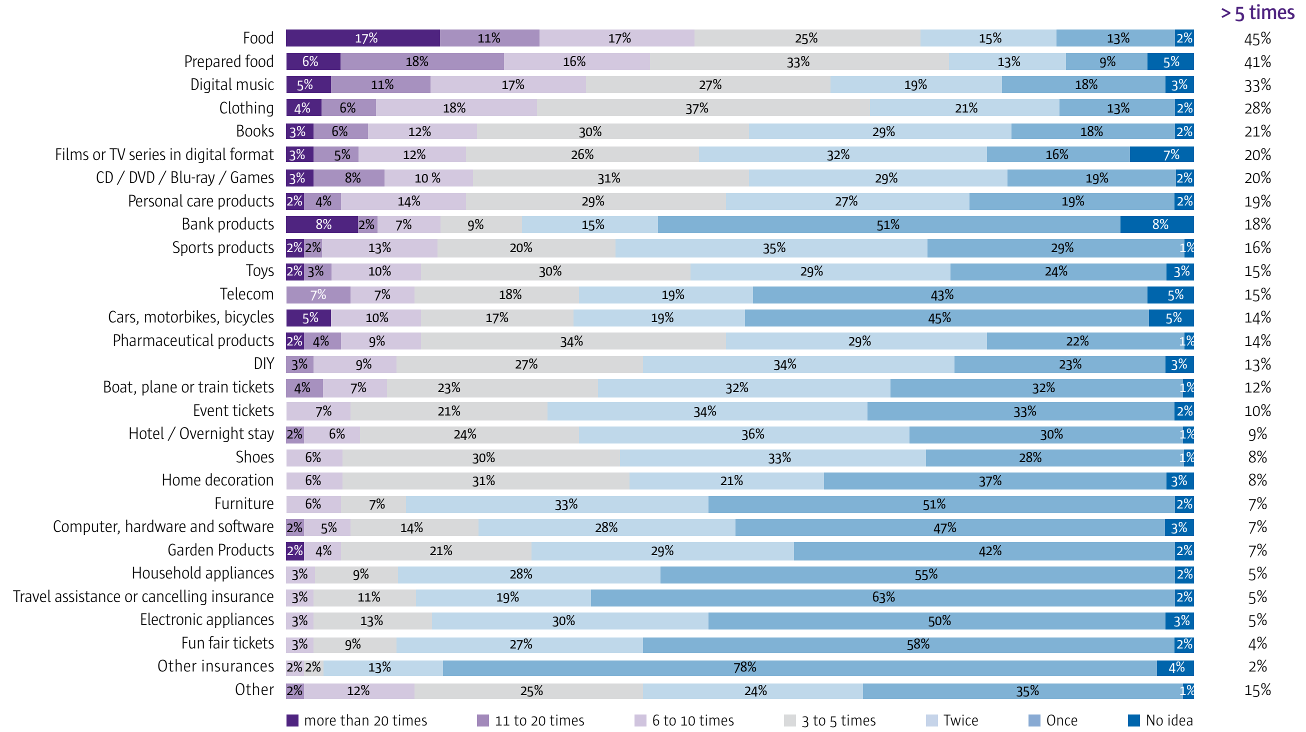
N = 1509 / F = None

Online purchases

Top 3 remains identical & purchase of food keeps growing in frequency

Frequency current online purchases

Q: Please indicate how often you bought the following new products via the Internet (for personal purposes) in the past 12 months?



N = Between 42 (Cars, motorbikes, bicycles) and 736 (Clothing) / F = if purchased online in the past 12 months

Online purchases

Frequency current online purchases • Evolutions

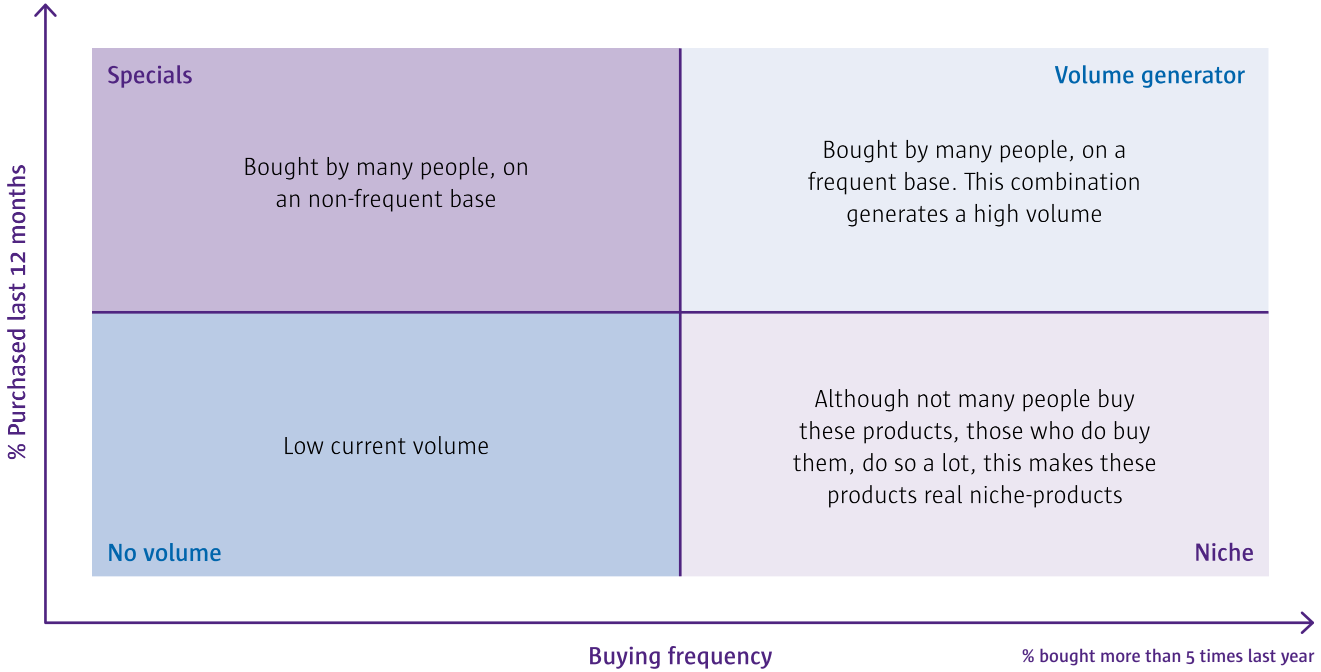
Q: Which new products or services did you buy via the Internet (for personal purposes) in the past 12 months? (More than 5 times)

	2016	Evolution 2016-2015	Evolution 2016-2011
Food	45%	+5%	0%
Prepared food	41%	+5%	+15%
Digital music	33%	-2%	-5%
Clothing / shoes	25%	+1%	+5%
Books	21%	+3%	+7%
CD / DVD / Blu-ray / Games	20%	-1%	-1%
Films or TV series in digital format	20%	-1%	-25%
Personal care products	19%	+6%	+9%
Bank products	18%	+5%	N/A
Sports products	16%	+7%	+3%
Telecom	15%	0%	+9%
Toys	15%	+5%	-3%
Cars, motorbikes, bicycles	14%	+6%	+13%
Pharmaceutical products	14%	0%	+4%
Boat, plane or train tickets	12%	+1%	-1%
DIY and garden products	10%	+3%	+8%
Event tickets	10%	+5%	+5%
Hotel / Overnight stay	9%	0%	+1%
Furniture and home decoration	8%	-1%	+7%
Computer, hardware and software	7%	0%	+1%
Electronic appliances	5%	+3%	+2%
Household appliances	5%	+3%	+2%
Travel assistance or cancellation insurance	5%	+2%	N/A
Fun fair tickets	4%	0%	+2%
Other insurances	2%	+2%	N/A

45% of online buyers bought food more than 5x in past 12 months

N = Between 42 (Cars, motorbikes, bicycles) and 736 (Clothing) / F = if purchased online in the past 12 months

Online purchases



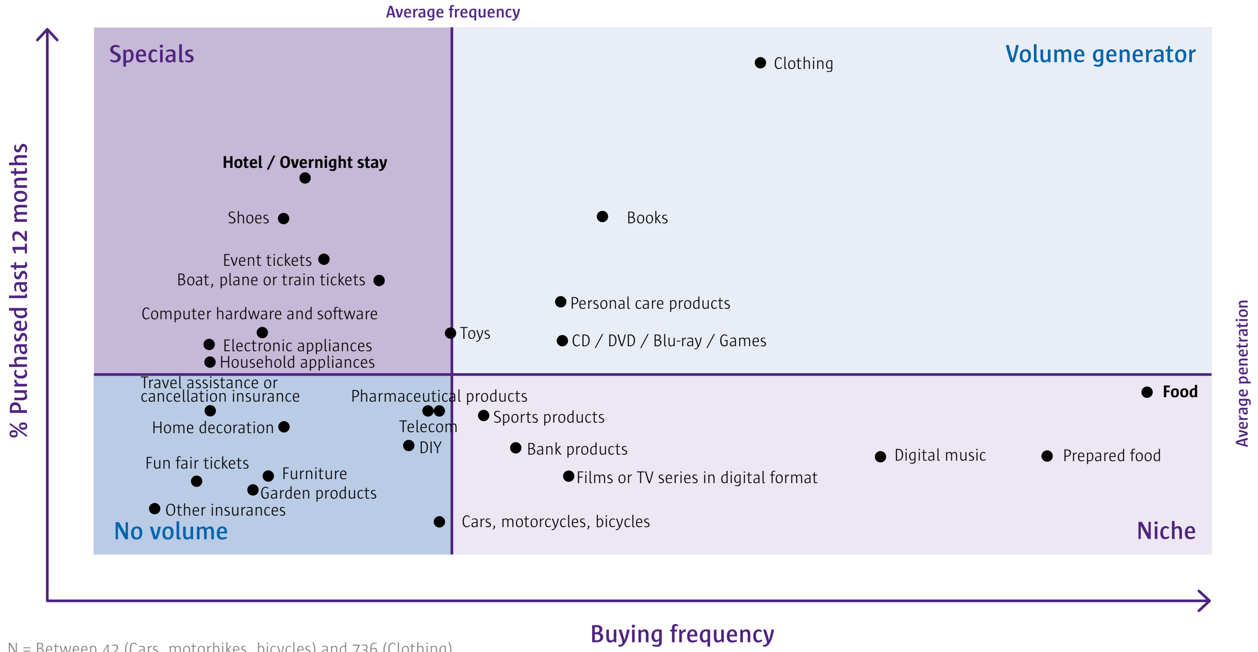
Online purchases

Quadrant

Q: Which new products or services did you buy via the Internet (for personal purposes) in the past 12 months?

Q: Please indicate how often you bought the following new products via the Internet (for personal purposes) in the past 12 months (financial services included)

Few people buy food online, but they do it often. Many people buy accomodation services online, but not on a regular base



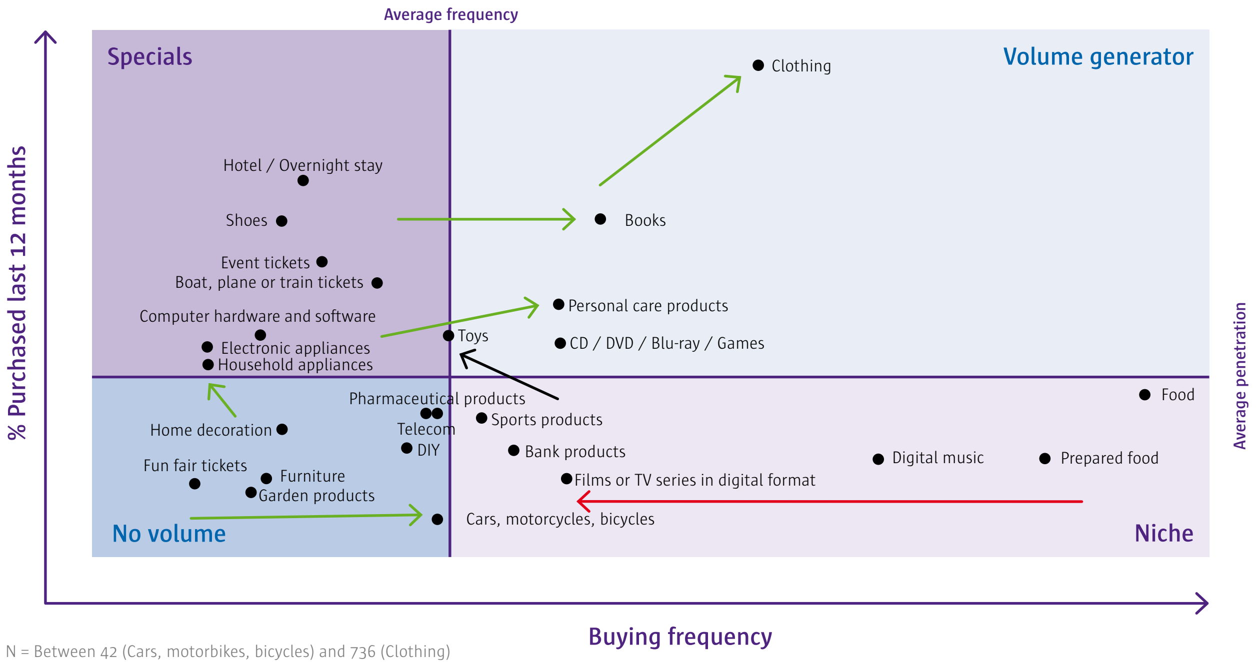
N = Between 42 (Cars, motorbikes, bicycles) and 736 (Clothing)
F = if purchased online in the past 12 months

Online purchases

Quadrant 2016 • evolution since 2011

Q: Which new products or services did you buy via the Internet (for personal purposes) in the past 12 months?

Q: Please indicate how often you bought the following new products via the Internet (for personal purposes) in the past 12 months (financial services included)



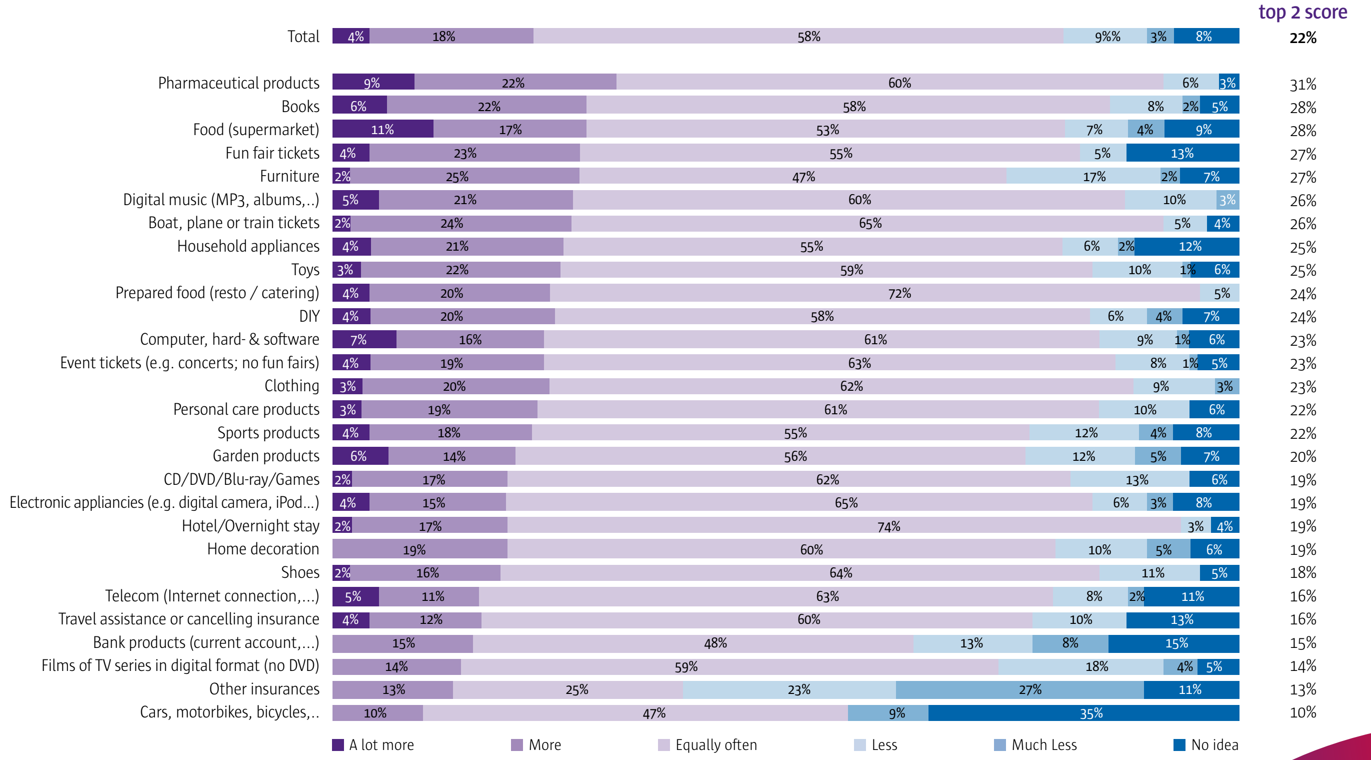
N = Between 42 (Cars, motorbikes, bicycles) and 736 (Clothing)
F = if purchased online in the past 12 months

Online purchases

3 out of 10 online buyers intend to buy more pharmaceutical products, food & books

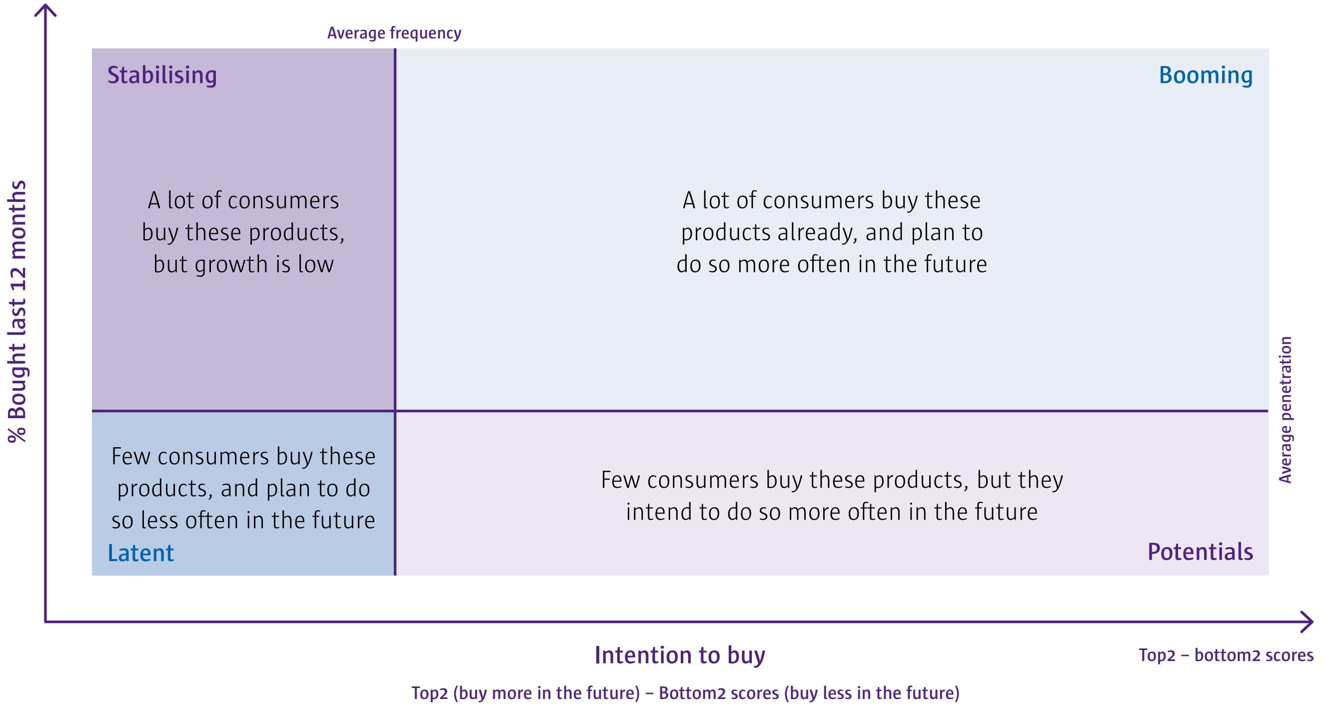
Future intention to buy

Q: Do you expect to buy the following products more or less in the future?



N = Between 42 (Cars, motorbikes, bicycles) and 736 (Clothing) F = if purchased online in the past 12 months

Online purchases



A lot of consumers buy these products, but growth is low

A lot of consumers buy these products already, and plan to do so more often in the future

Few consumers buy these products, and plan to do so less often in the future

Few consumers buy these products, but they intend to do so more often in the future

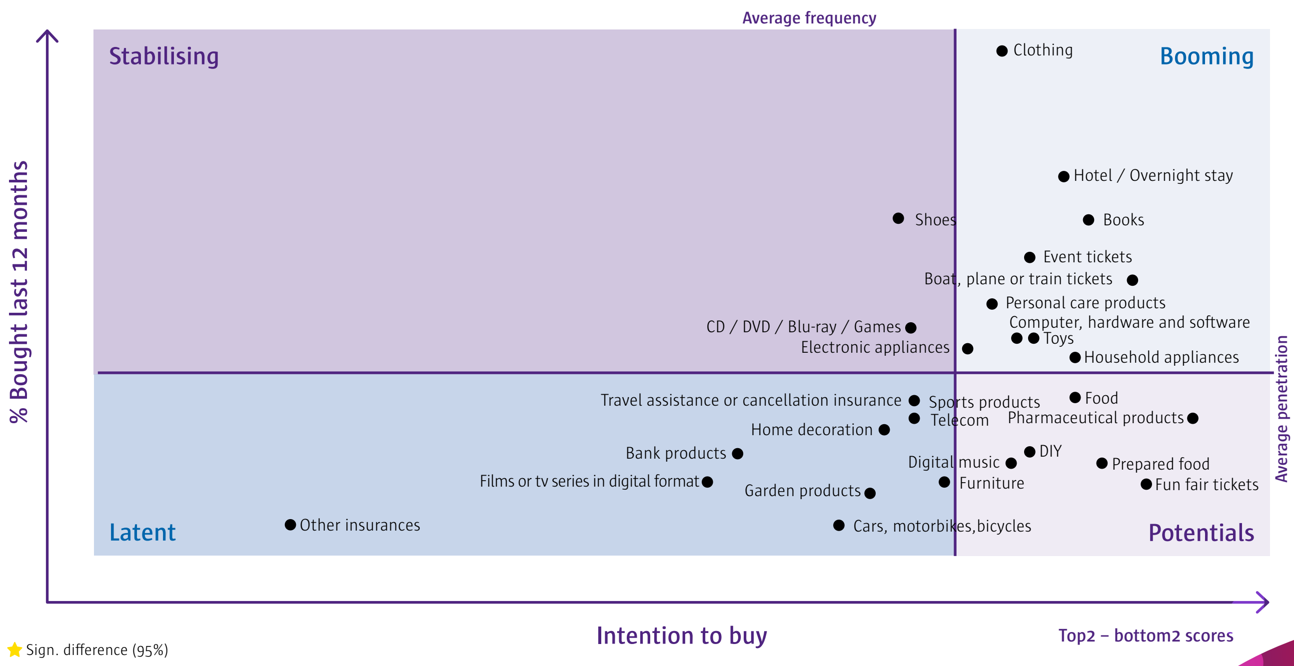
Online purchases

Highest potential for food, pharmaceutical products, leisure activities

Quadrant

Q: Which new products or services did you buy via the Internet (for personal purposes) in the past 12 months?

Q: Do you expect to buy the following products more or less in the future? (financial services included)



★ Sign. difference (95%)

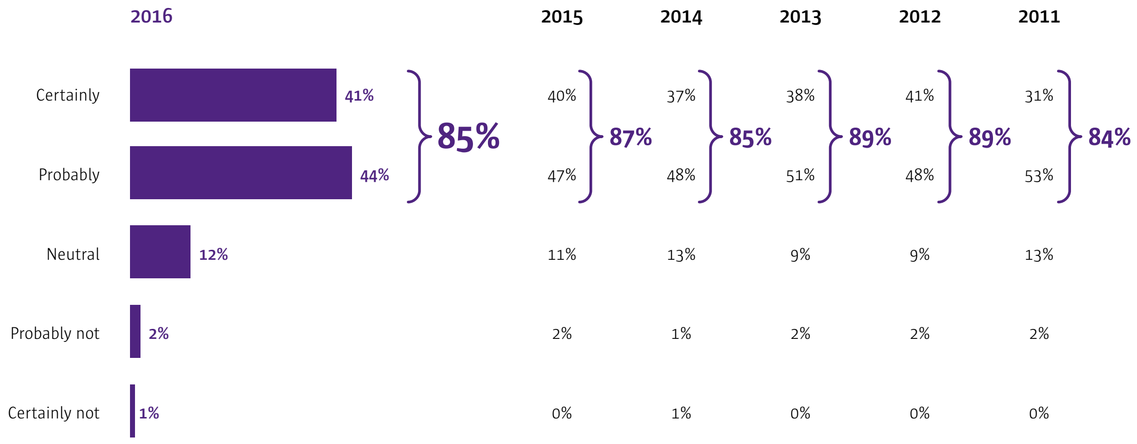
N = Between 42 (Cars, motorbikes, bicycles) and 736 (Clothing)
F = if purchased online in the past 12 months

Online purchases

Slightly less satisfied customers

Future intention to buy

Q: How likely are you to purchase other new products or services on the internet in the future?

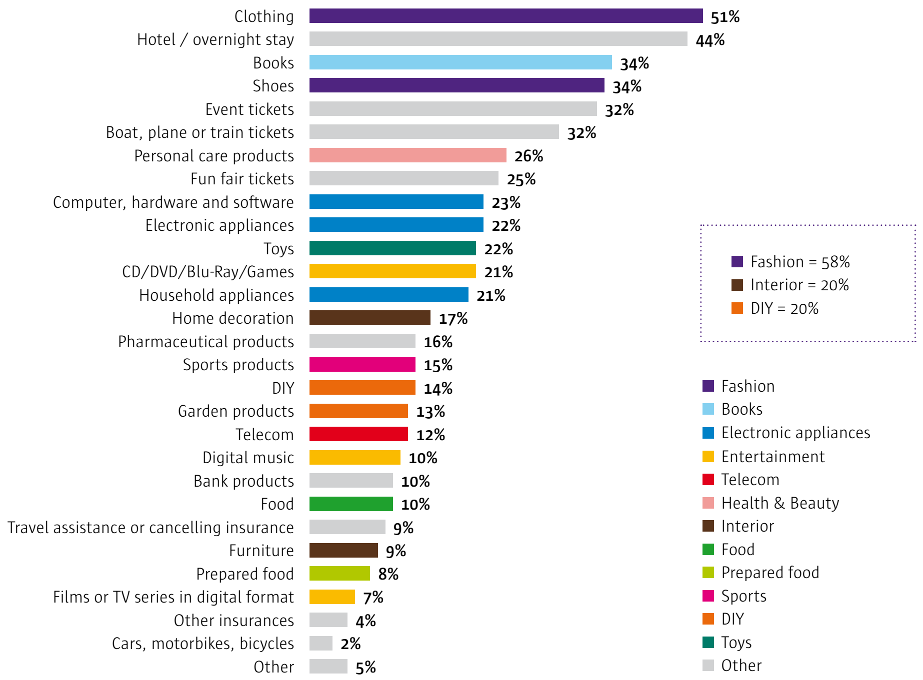


N = 1509 / F = None

Online purchases

Intention to buy next 12 months

Q: Which of the following products would you consider purchasing online in the coming 12 months?



51% of online buyers intend to purchase clothing next year

N = 1289 / F = Only if probably or certainly buy online in the future

Online purchases

Intention to buy next 12 months • Evolutions

Q: which of the following products would you consider purchasing online in the coming 12 months?

	2016	Evolution 2016-2015	Evolution 2016-2011
Clothing / shoes	**58%**	0%	**+21%**
Hotel / overnight stay	**44%**	**-6%**	-3%
Books	**34%**	-4%	-3%
Event tickets	**32%**	**-7%**	**-12%**
Boat, plane or train tickets	**32%**	**-8%**	-10%
Personal care products	**26%**	0%	**+10%**
Fun fair tickets	**25%**	**+4%**	+5%
Computer, hardware and software	**23%**	-2%	-3%
Electronic appliances	**22%**	-1%	+1%
Toys	**22%**	0%	+5%
CD / DVD / Blu-ray / Games	**21%**	-2%	-5%
Household appliances	**21%**	-1%	+7%
Furniture and home decoration	**20%**	0%	**+12%**
DIY and garden products	**20%**	+1%	**+11%**
Pharmaceutical products	**16%**	**+4%**	+9%
Sports products	**15%**	+1%	+7%
Telecom	**12%**	-2%	-1%
Digital music	**10%**	0%	-8%
Food	**10%**	-3%	-1%
Bank products	**10%**	-4%	N/A
Travel assistance or cancellation insurance	**9%**	-1%	N/A
Prepared food	**8%**	+2%	+4%
Films or TV series in digital format	**7%**	-1%	-1%
Other insurances	**4%**	-1%	N/A
Cars, motorbikes, bicycles	**2%**	-1%	-1%
Other	**5%**	0%	-2%

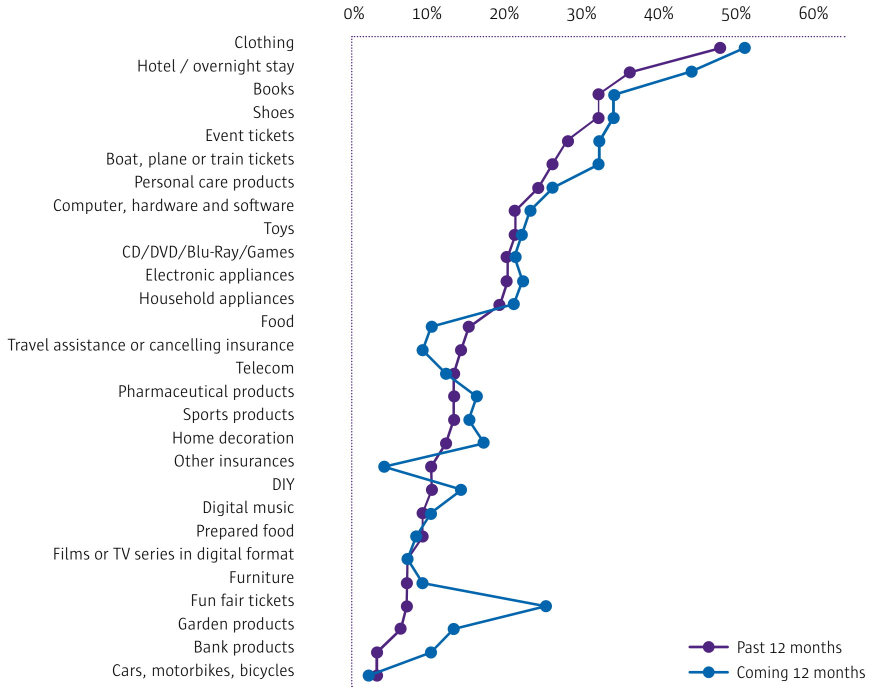
N = 1289 / F = Only if probably or certainly buy online in the future

Pharmaceutical products & fun fair tickets = next big thing

Online purchases

Evolution new products

Q: Which new products or services did you buy via the Internet (for personal purposes) in the past 12 months?
Q: Which of the following products would you consider purchasing online in the coming 12 months?



N = 1289 / F = Only if probably or certainly buy online in the future

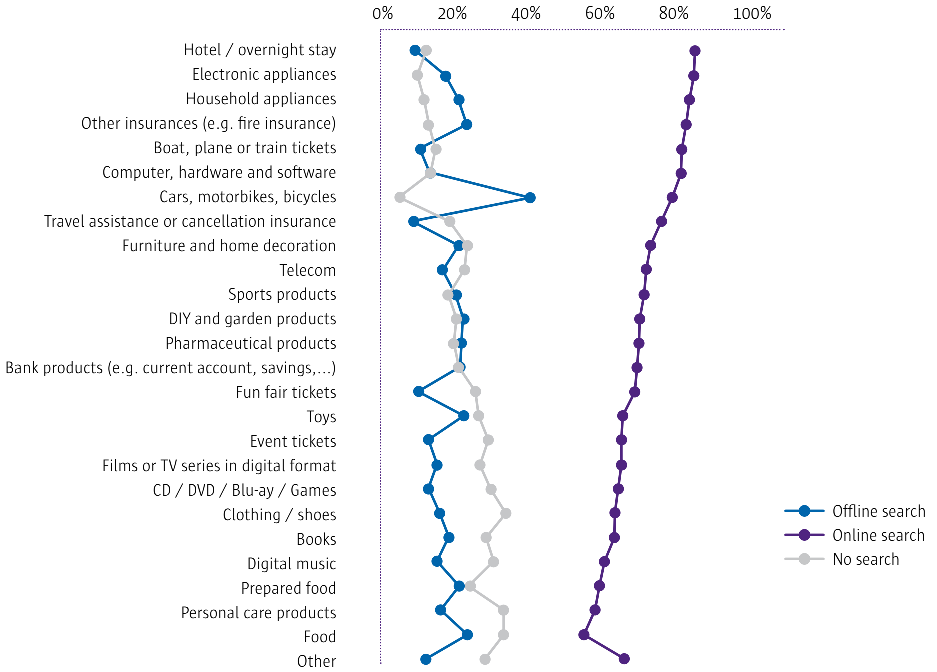
Intention to re-purchase stronger amongst products than services

Online purchases

Information search

Q: To what extent have you looked for information before buying the following products online?

Online information = 'must' across all sectors



ONLINE SEARCH

	2016	Evolution 2016-2015	Evolution 2016-2011
Hotel / overnight stay	87%	+2%	+24%
Electronic appliances	87%	0%	+9%
Household appliances	85%	+5%	+16%
Other insurances (e.g. fire insurance)	84%	+2%	N/A
Boat, plane or train tickets	83%	+2%	-4%
Computer, hardware and software	83%	+1%	+13%
Cars, motorbikes, bicycles	80%	+10%	-12%
Travel assistance or cancellation insurance	77%	-5%	N/A
Furniture and home decoration	74%	+6%	+6%
Telecom	73%	0%	+17%
Sports products	72%	+4%	+2%
DIY and garden products	71%	0%	+1%
Pharmaceutical products	71%	0%	+6%
Bank products (e.g. current account, savings,...)	70%	-10%	N/A
Fun fair tickets	70%	+1%	-11%
Toys	66%	-9%	-5%
Event tickets	66%	-7%	+9%
Films or TV series in digital format	66%	-4%	-4%
CD / DVD / Blu-ay / Games	65%	-1%	-2%
Clothing / shoes	64%	+1%	-22%
Books	64%	+3%	-20%
Digital music	61%	-2%	-31%
Prepared food	60%	-1%	-18%
Personal care products	58%	-1%	+3%
Food	55%	-3%	-20%
Other	67%	+4%	-12%

N = 1509 / F = None

Sector focus

+7%

is willing to pay more than 10€ for delivery

Price is main driver for buying online & for choice of website

8/10

customers want delivery during business hours, for no extra cost

Sector Focus

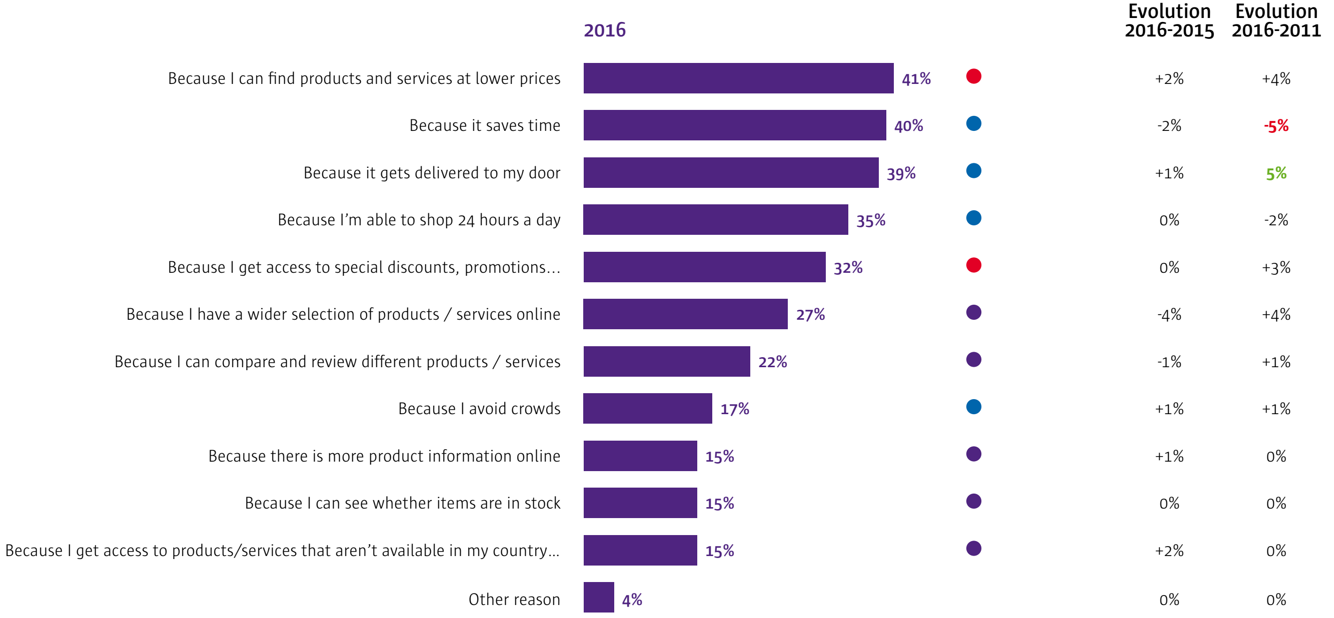
Price, time & home delivery = top 3 drivers

Drivers for E-commerce • Evolutions

Q: What are the 3 main reasons why you bought this product online?

% CONSUMERS WHO INDICATE THIS AS A TOP 3 DRIVER TO BUY ONLINE

🔵 Time & convenience 🔴 Money 🟣 Purchase management



	2016		Evolution 2016-2015	Evolution 2016-2011
Because I can find products and services at lower prices	41%	🔴	+2%	+4%
Because it saves time	40%	🔵	-2%	-5%
Because it gets delivered to my door	39%	🔵	+1%	5%
Because I'm able to shop 24 hours a day	35%	🔵	0%	-2%
Because I get access to special discounts, promotions…	32%	🔴	0%	+3%
Because I have a wider selection of products / services online	27%	🟣	-4%	+4%
Because I can compare and review different products / services	22%	🟣	-1%	+1%
Because I avoid crowds	17%	🔵	+1%	+1%
Because there is more product information online	15%	🟣	+1%	0%
Because I can see whether items are in stock	15%	🟣	0%	0%
Because I get access to products/services that aren't available in my country…	15%	🟣	+2%	0%
Other reason	4%		0%	0%

N = 3535 / F = if purchased online in the past 12 months

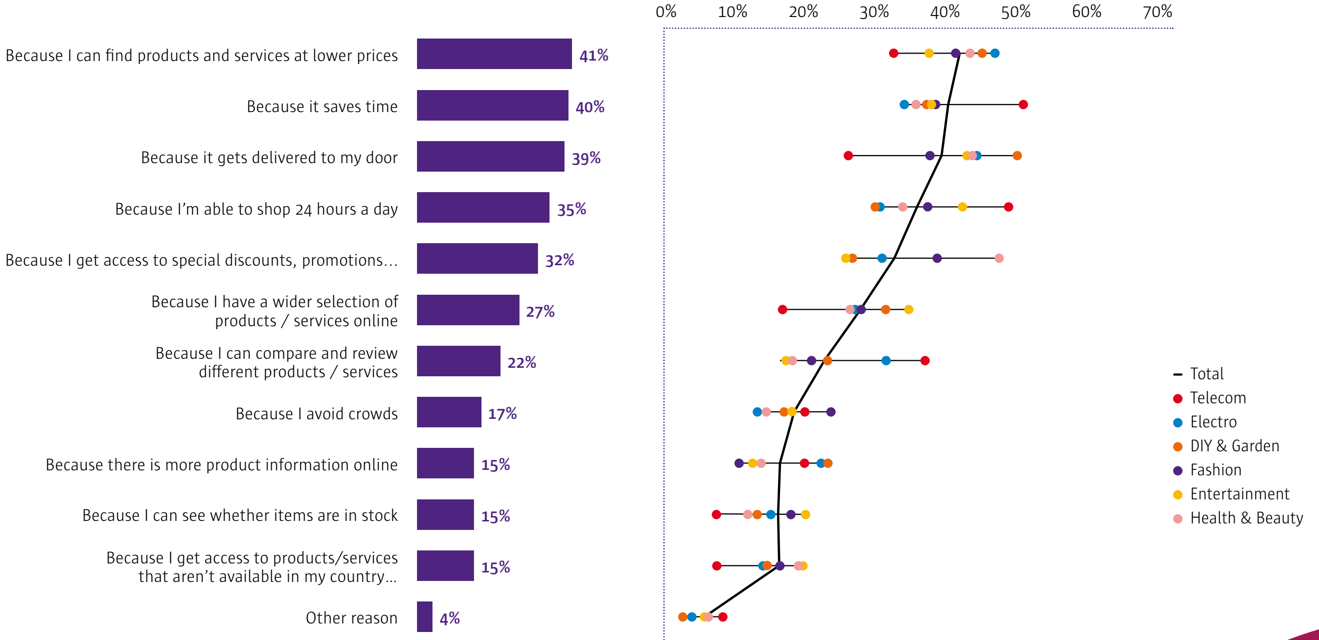
Sector Focus

Ranking drivers varies from sector to sector

Drivers for E-commerce (details 1/2)

Q: What are the 3 main reasons why you bought this product online?

PERCEIVED AS IMPORTANT
% CONSUMERS WHO INDICATE THIS AS A TOP 3 DRIVER



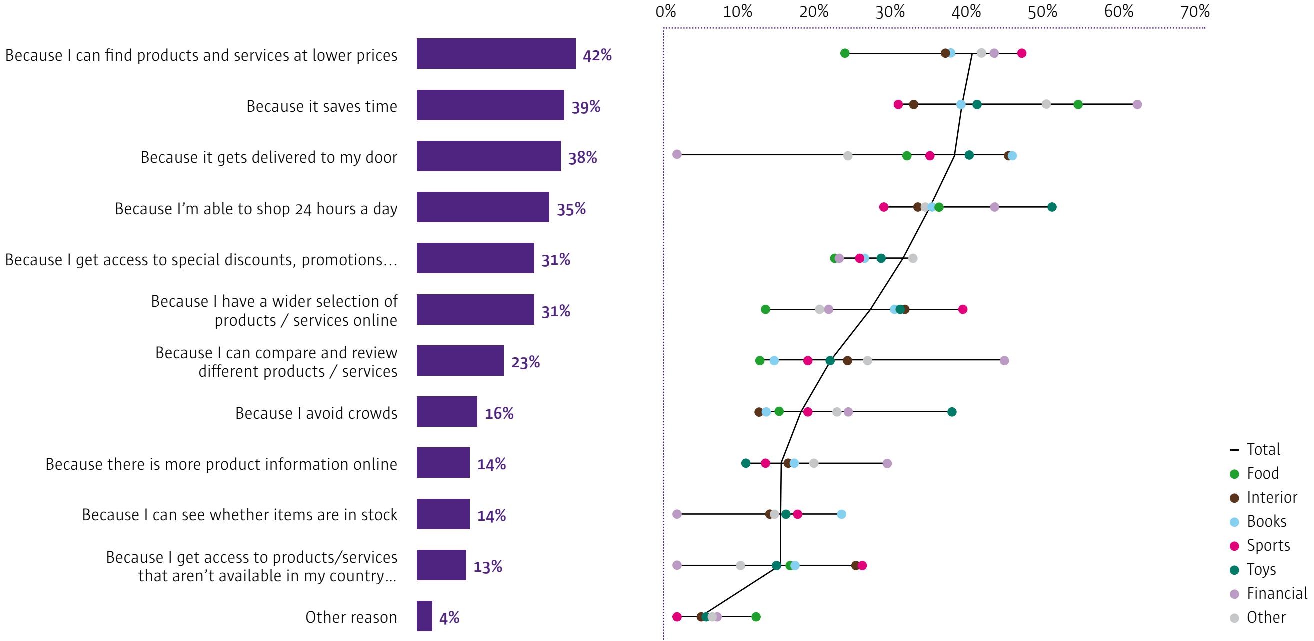
N = Between 75 (Financial) and 669 (Fashion) / F = if purchased online in the past 12 months
Note: Significant differences between sectors can be found in the sector reports

Sector Focus

Drivers for E-commerce (details 2/2)

Q: What are the 3 main reasons why you bought this product online?

PERCEIVED AS IMPORTANT
% CONSUMERS WHO INDICATE THIS AS A TOP 3 DRIVER



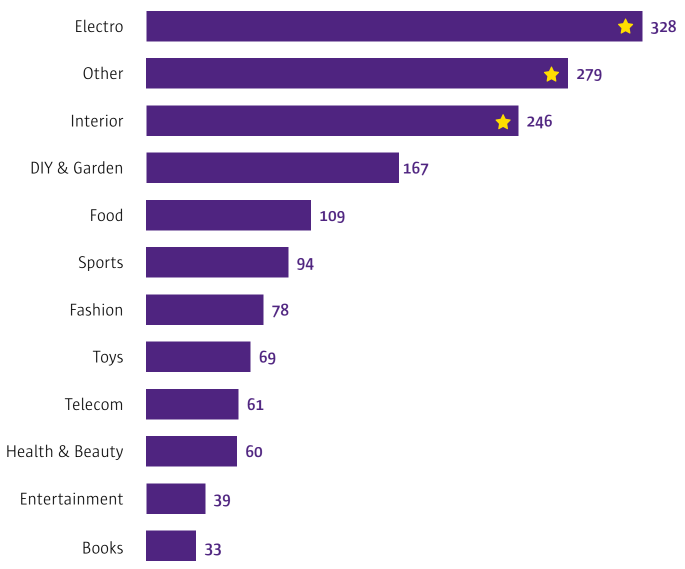
N = Between 75 (Financial) and 669 (Fashion) / F = if purchased online in the past 12 months
Note: Significant differences between sectors can be found in the sector reports

Sector Focus

Purchase amount

Q: How much money did you spend at your most recent online purchase?

AVERAGE AMOUNT MOST RECENT ONLINE PURCHASE € 130 (PREVIOUS WAVE = € 133)



Slight decrease in average online spending on most recent purchase

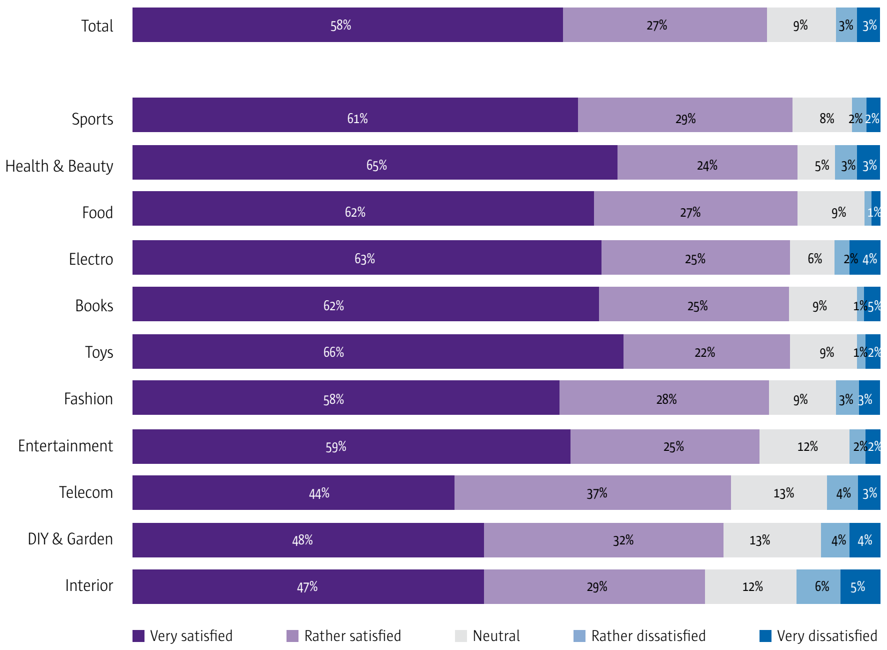
N = Between 78 (Food) and 638 (Fashion) / F = if purchased online in the past 12 months
★ Sig. Higher compared to other group (95%)

Sector Focus

Website satisfaction

Winners in website satisfaction: sports, electro, DIY & Garden

Q: How satisfied were you with using the e-commerce website after your most recent online purchase?



TOP 2

	2016	2015	2014	2013	2012	2011
Total	85 %	84%	86%	81%	85%	82%
Sports	89%	85%	88%	83%	91%	72
Health & Beauty	89%	87%	92%	80%	83%	83%
Food	88%	87%	86%	71%	87%	84%
Electro	88%	84%	87%	80%	84%	83%
Books	88%	87%	90%	84%	88%	88%
Toys	88%	88%	87%	93%	91%	N/A
Fashion	86%	84%	87%	79%	87%	83%
Entertainment	84%	81%	84%	82%	87%	81%
Telecom	81%	81%	83%	79%	71%	72%
DIY & Garden	80%	76%	80%	65%	82%	73%
Interior	75% ⇩	76%	79%	85%	80%	78%

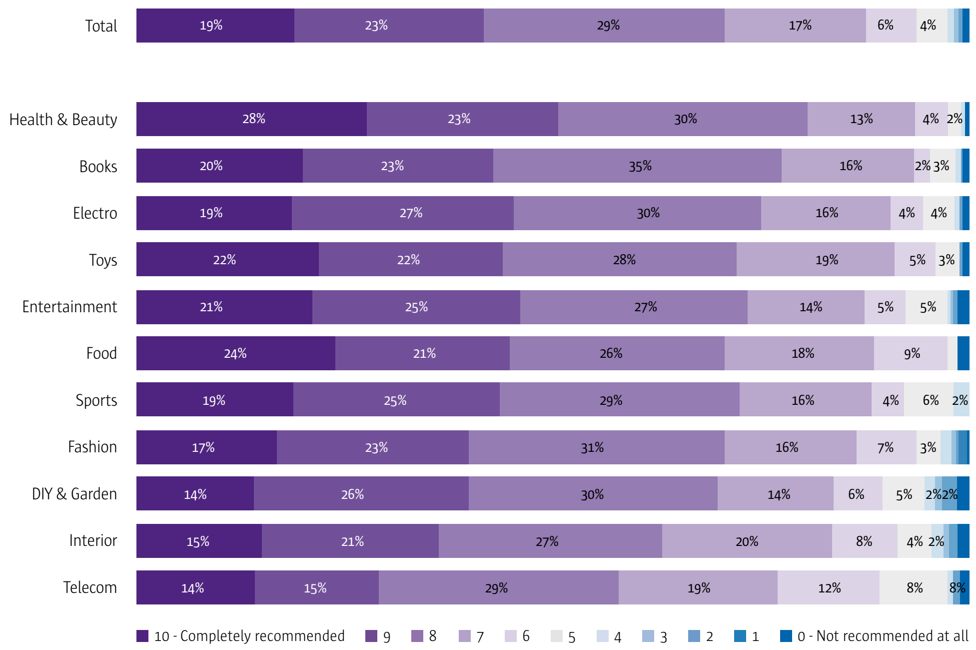
N = Between 78 (Food) and 638 (Fashion) / F = if purchased online in the past 12 months

Sector Focus

Website Recommendation

Most likely to be recommended: health & beauty, books and electro

Q: How likely are you to recommend 'website' to a friend, on a scale from 0 to 10?



NPS

	2016	2015	2014	2013	2012	2011
Total	30	27	27	22	34	21
Health & Beauty	44	33	26	12	39	37
Books	37	33	34	34	39	24
Electro	36	29	26	18	37	25
Toys	35	28	28	30	40	N/A
Entertainment	34	31	27	26	42	24
Food	33	35	37	42	40	41
Sports	32	23	32	25	52	2
Fashion	27	24	31	18	25	18
DIY & Garden	24	12	7	0	41	9
Interior	18	15	2	10	5	6
Telecom	7	13	13	11	9	3

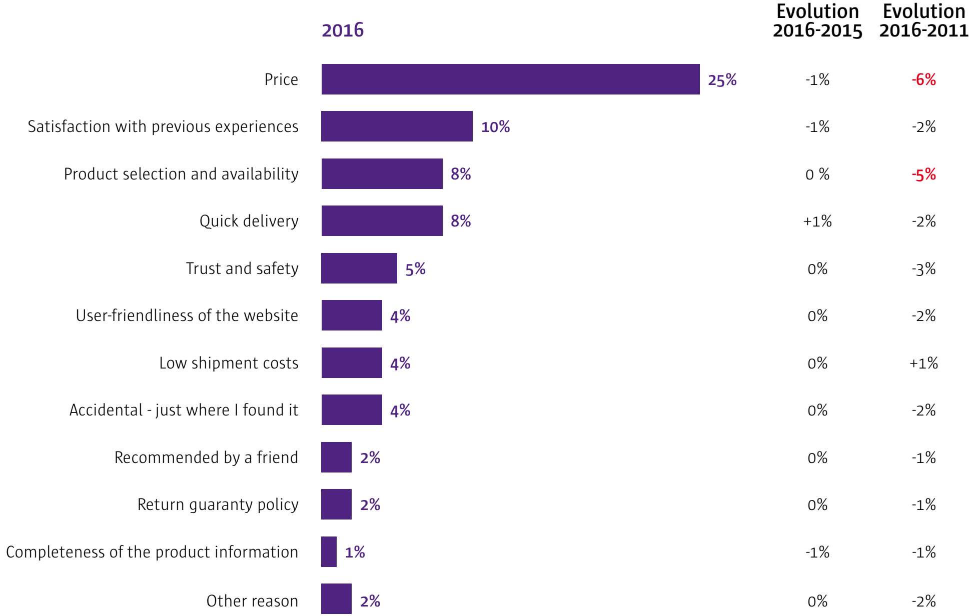
N = Between 78 (Food) and 638 (Fashion) / F = if purchased online in the past 12 months

Sector Focus

Drivers website • Evolutions

Q: Why did you use ‘website’ for your online purchase? Please indicate which 3 factors were the most important.

% CONSUMERS WHO INDICATE THIS AS MOST IMPORTANT DRIVER TO USE THE WEBSITE



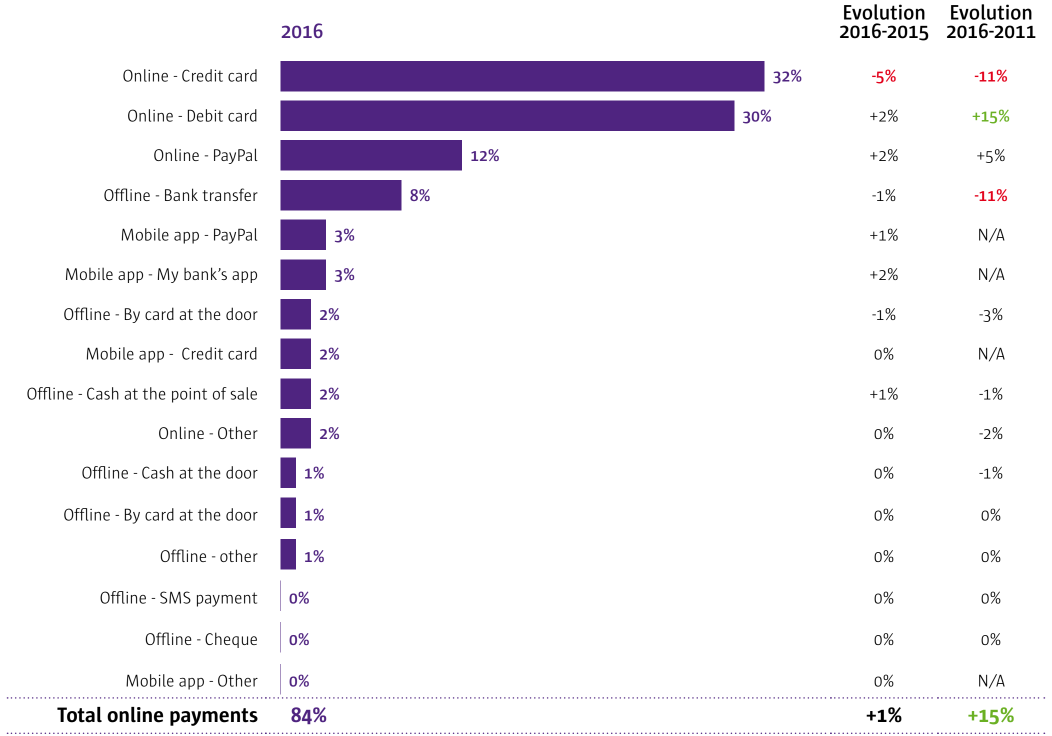
	2016	Evolution 2016-2015	Evolution 2016-2011
Price	25%	-1%	-6%
Satisfaction with previous experiences	10%	-1%	-2%
Product selection and availability	8%	0 %	-5%
Quick delivery	8%	+1%	-2%
Trust and safety	5%	0%	-3%
User-friendliness of the website	4%	0%	-2%
Low shipment costs	4%	0%	+1%
Accidental - just where I found it	4%	0%	-2%
Recommended by a friend	2%	0%	-1%
Return guaranty policy	2%	0%	-1%
Completeness of the product information	1%	-1%	-1%
Other reason	2%	0%	-2%

N = 3535 / F = if purchased online in the past 12 months

Sector Focus

Payment method • Evolutions

Q: How did you pay for it?



	2016	Evolution 2016-2015	Evolution 2016-2011
Online - Credit card	32%	-5%	-11%
Online - Debit card	30%	+2%	+15%
Online - PayPal	12%	+2%	+5%
Offline - Bank transfer	8%	-1%	-11%
Mobile app - PayPal	3%	+1%	N/A
Mobile app - My bank’s app	3%	+2%	N/A
Offline - By card at the door	2%	-1%	-3%
Mobile app - Credit card	2%	0%	N/A
Offline - Cash at the point of sale	2%	+1%	-1%
Online - Other	2%	0%	-2%
Offline - Cash at the door	1%	0%	-1%
Offline - By card at the door	1%	0%	0%
Offline - other	1%	0%	0%
Offline - SMS payment	0%	0%	0%
Offline - Cheque	0%	0%	0%
Mobile app - Other	0%	0%	N/A
Total online payments	**84%**	**+1%**	**+15%**

Use of debit cards & credit cards close to equal

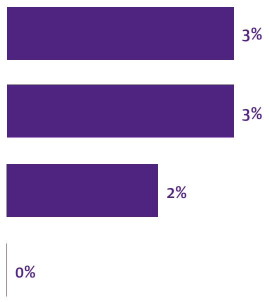
N = 3535 / F = if purchased online in the past 12 months

Sector Focus

Payment method • Evolutions

Q: How did you pay for it?

TRANSACTION MOBILE PAYMENT METHOD



	2016	Evolution 2016-2015	Evolution 2016-2011
Mobile app - Paypal	3%	1%	N/A
Mobile app - My bank's app	3%	2%	N/A
Mobile app - Credit card	2%	0%	N/A
Mobile app - Other	0%	0%	N/A
Total Mobile payments	**8%**	**+2%**	**N/A**

8% of online purchases are paid through mobile or tablet

N = 3535 / F = if purchased online in the past 12 months

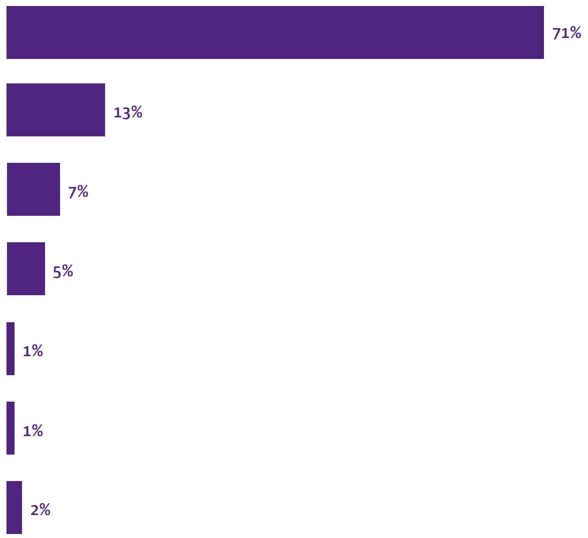
Sector Focus

Home delivery is the only growing delivery method

Delivery preference • Evolutions

Q: How do you prefer your online purchases ‘product sector’ to be delivered?

DELIVER PLACE



	2016	Evolution 2016-2015	Evolution 2016-2011
Home delivery	71%	+2%	+5%
Pick-up at a pick-up point	13%	-1%	-2%
Pick-up at the shop	7%	-1%	-1%
Delivery at work	5%	0%	-1%
Pick-up in a locker (sealed container to be opened with a code)	1%	0%	+1%
Other	1%	0%	-1%
Does not matter to me	2%	0%	-1%

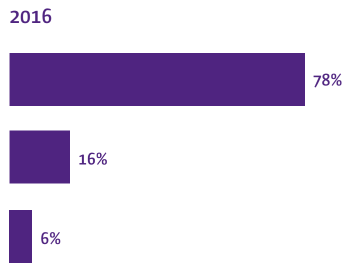
N = 2811 / F = if purchased online in the past 12 months

Sector Focus

Delivery time • Evolutions

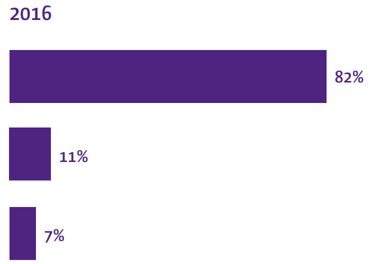
Q: How do you prefer your online purchases ‘product sector’ to be delivered?

HOUR



	2016	Evolution 2016-2015	Evolution 2016-2011
Between 9.00 and 18.00 will do, if I don’t have to pay anything extra	78%	-1%	+2%
It should be possible between 8.00 and 20.00, even if I have to pay something extra	16%	+1%	+1%
It should be possible 24h/7, even if I have to pay extra	6%	-1%	-3%

DAYS OF THE WEEK



	2016	Evolution 2016-2015	Evolution 2016-2011
During the week is sufficient, if I don’t have to pay anything extra	82%	-4%	-1%
Also during the weekend, even if I have to pay something extra	11%	+2%	-3%
Also on Sunday, even if I have to pay something extra	7%	+3%	+4%

18% of customers willing to pay extra for weekend deliveries

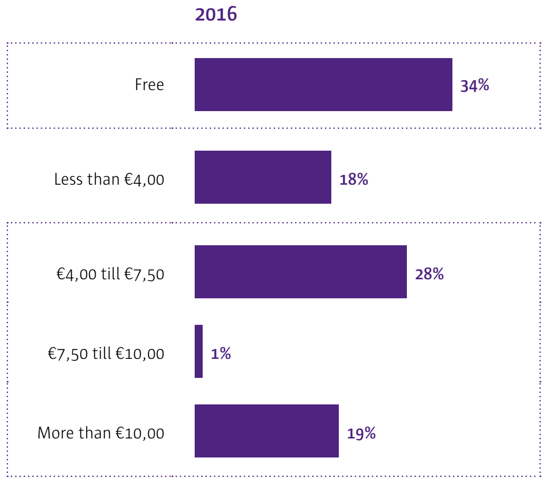
N = 2722 / F = if purchased online in the past 12 months

Sector Focus

Delivery price • Evolutions

Q: How much are you willing to pay for the delivery of the ‘product’ you buy online?

COST OF DELIVERY



	2016	Evolution 2016-2015	Evolution 2016-2011
Free	34%	+5%	+16%
Less than €4,00	18%	+1%	-5%
€4,00 till €7,50	28%	-4%	-3%
€7,50 till €10,00	1%	-9%	-13%
More than €10,00	19%	+7%	+5%

Breakdown

People 44 or older & Dutch speaking respondents are less willing to pay for delivery

People under 44, French speaking respondents and those who prefer home delivery are more willing to pay for delivery

N = 2048 / F = if purchased online in the past 12 months

E-commerce trust & experience

7/10

customers only
go for reliable &
familiar sites

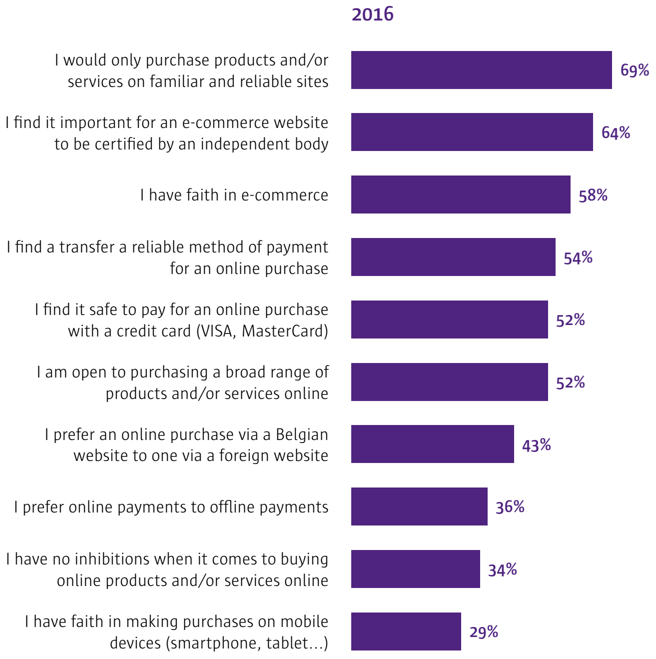
43%

prefer Belgian webshops

E-commerce trust & experience

E-commerce trust

Q: To what extent do you agree with the following statements? (Top 2 scores)



	2016	2015	2014	2013	2012	2011
I would only purchase products and/or services on familiar and reliable sites	69%	69%	66%	69%	77%	74%
I find it important for an e-commerce website to be certified by an independent body	64%	63%	63%	68%	74%	69%
I have faith in e-commerce	58%	60%	60%	60%	66%	59%
I find a transfer a reliable method of payment for an online purchase	54%	58%	57%	63%	68%	62%
I find it safe to pay for an online purchase with a credit card (VISA, MasterCard)	52%	50%	50%	49%	57%	48%
I am open to purchasing a broad range of products and/or services online	52%	51%	49%	45%	52%	46%
I prefer an online purchase via a Belgian website to one via a foreign website	43%	45%	43%	50%	47%	46%
I prefer online payments to offline payments	36%	36%	39%	35%	38%	34%
I have no inhibitions when it comes to buying online products and/or services online	34%	33%	34%	34%	37%	31%
I have faith in making purchases on mobile devices (smartphone, tablet...)	29%	27%	N/A	N/A	N/A	N/A

N = 1509 / F = None

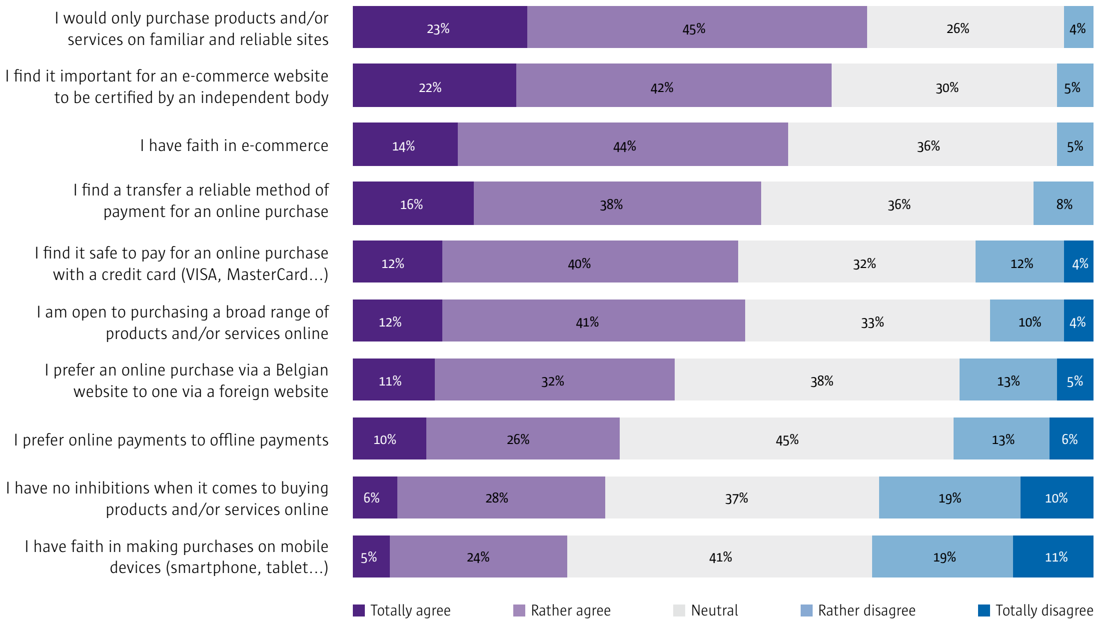
Customers gain confidence in making purchases via smartphone or tablet (+2%)

E-commerce trust

30% still reluctant to buying on mobile device

E-commerce trust (detail)

Q: To what extent do you agree with the following statements? (Top 2 scores)



	Totally agree	Rather agree	Neutral	Rather disagree	Totally disagree	2016	2015	EVOLUTION
I would only purchase products and/or services on familiar and reliable sites	23%	45%	26%	4%		69%	69%	—
I find it important for an e-commerce website to be certified by an independent body	22%	42%	30%	5%		64%	63%	+2%
I have faith in e-commerce	14%	44%	36%	5%		58%	60%	-2%
I find a transfer a reliable method of payment for an online purchase	16%	38%	36%	8%		54%	58%	-4%
I find it safe to pay for an online purchase with a credit card (VISA, MasterCard...)	12%	40%	32%	12%	4%	52%	50%	+2%
I am open to purchasing a broad range of products and/or services online	12%	41%	33%	10%	4%	52%	51%	+1%
I prefer an online purchase via a Belgian website to one via a foreign website	11%	32%	38%	13%	5%	43%	45%	-2%
I prefer online payments to offline payments	10%	26%	45%	13%	6%	36%	36%	—
I have no inhibitions when it comes to buying products and/or services online	6%	28%	37%	19%	10%	34%	33%	+1%
I have faith in making purchases on mobile devices (smartphone, tablet...)	5%	24%	41%	19%	11%	29%	27%	+2%

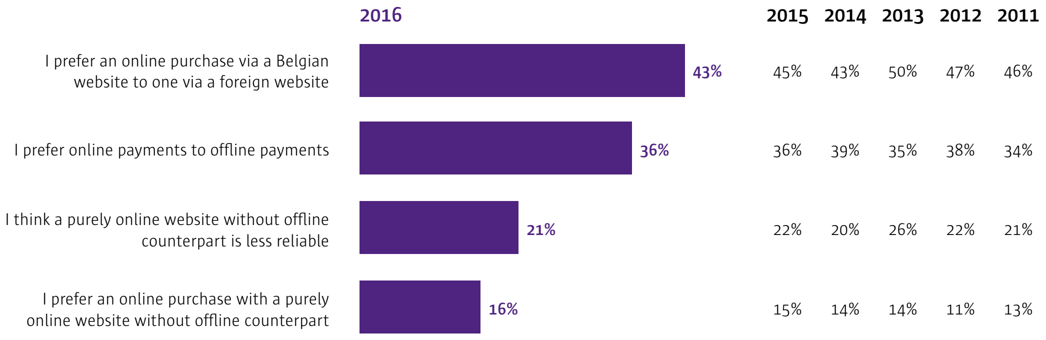
N = 1509 / F = None

E-commerce trust

E-commerce attitude

Q: To what extent do you agree with the following statements? (Top 2 scores)

16% has more confidence in pure players



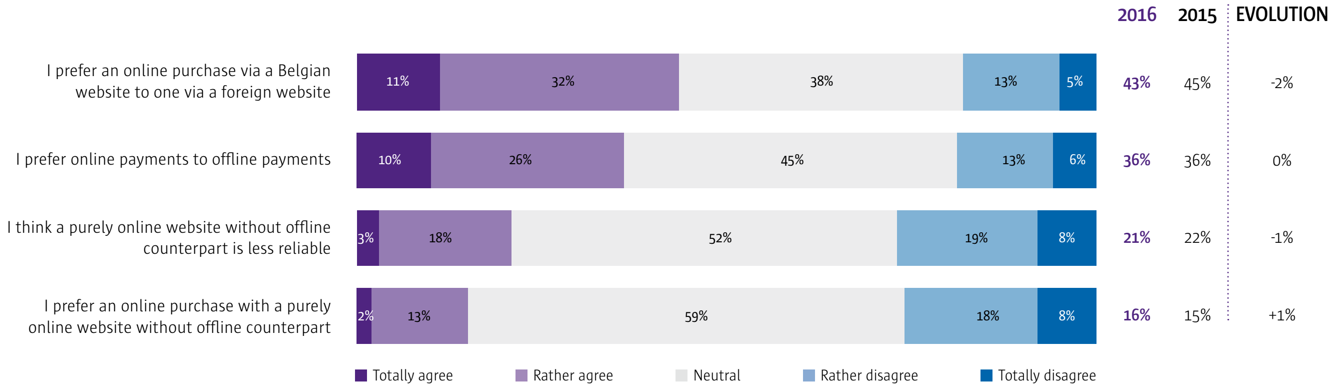
	2016	2015	2014	2013	2012	2011
I prefer an online purchase via a Belgian website to one via a foreign website	43%	45%	43%	50%	47%	46%
I prefer online payments to offline payments	36%	36%	39%	35%	38%	34%
I think a purely online website without offline counterpart is less reliable	21%	22%	20%	26%	22%	21%
I prefer an online purchase with a purely online website without offline counterpart	16%	15%	14%	14%	11%	13%

N = 1509 / F = None

E-commerce trust

E-commerce attitude (detail)

Q: To what extent do you agree with the following statements? (Top 2 scores)



	2016	2015	EVOLUTION
I prefer an online purchase via a Belgian website to one via a foreign website	43%	45%	-2%
I prefer online payments to offline payments	36%	36%	0%
I think a purely online website without offline counterpart is less reliable	21%	22%	-1%
I prefer an online purchase with a purely online website without offline counterpart	16%	15%	+1%

N = 1509 / F = None

Mobile purchases

21%

almost 1 out of 4
online buyers does
mobile purchases

2,5%

or 233.750 customers
buy exclusively on
tablet or smartphone

42%

would not
do it again

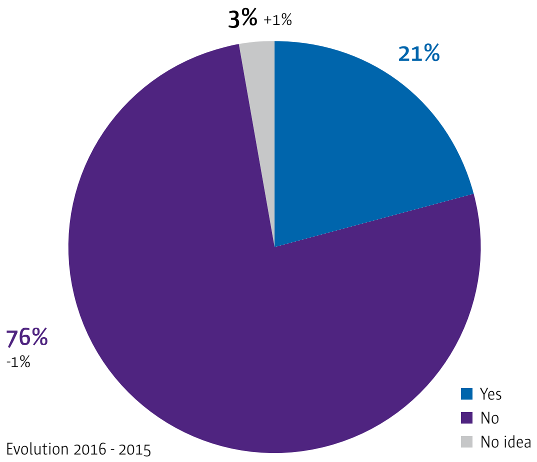
Mobile purchases

Current mobile purchases

Q: Did you buy products or services on the Internet on a mobile device (e.g. smartphone or tablet) in the past 12 months?

Level of mobile buyers remains stable (21% or 1,9 million)

CURRENT MOBILE PURCHASE BEHAVIOUR



	Mobile purchases in the past 12 months	Mobile purchases exclusively**
ONLINE BUYING POPULATION	21%	2,5%
ONLINE POPULATION	15%	2%
BELGIAN POPULATION*	13%	1,6%

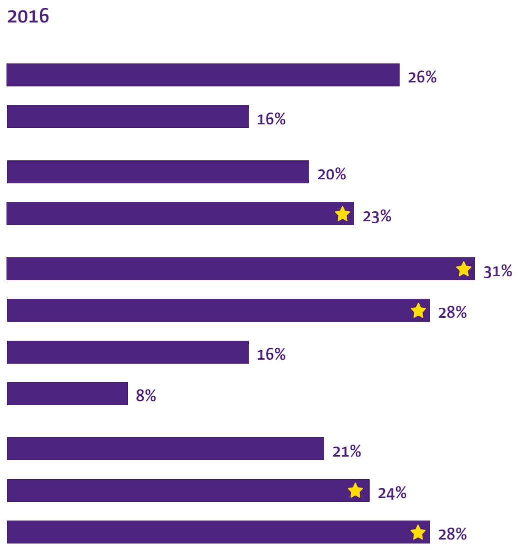
* Extrapolated to the Belgian population regarding the current internet-population (85% in 2016)
** Respondents who indicated not having bought online in the past 12 months but did indicate later on having bought on a mobile device

N = 1509 / F = None

Mobile purchases

Current mobile purchases

Q: Did you buy products or services on the Internet on a mobile device (e.g. smartphone or tablet) in the past 12 months?



		2016	2015	Evolution 2016-2015
Gender	Male	26%	22%	+4%
	Female	16%	20%	-4%
Language	Dutch	20%	19%	+1%
	French	★ 23%	23%	0%
Age	18-27	★ 31%	27%	+4%
	28-43	★ 28%	27%	+1%
	44-59	16%	15%	+1%
	60+	8%	12%	-4%
Income	Less than € 2500	21%	19%	+2%
	€ 2500 - 3500	★ 24%	25%	-1%
	More than € 3500	★ 28%	27%	+1%

Profile mobile buyer: male, young, high income

★ Sign. Different from at least one other target group (95% confidence level)

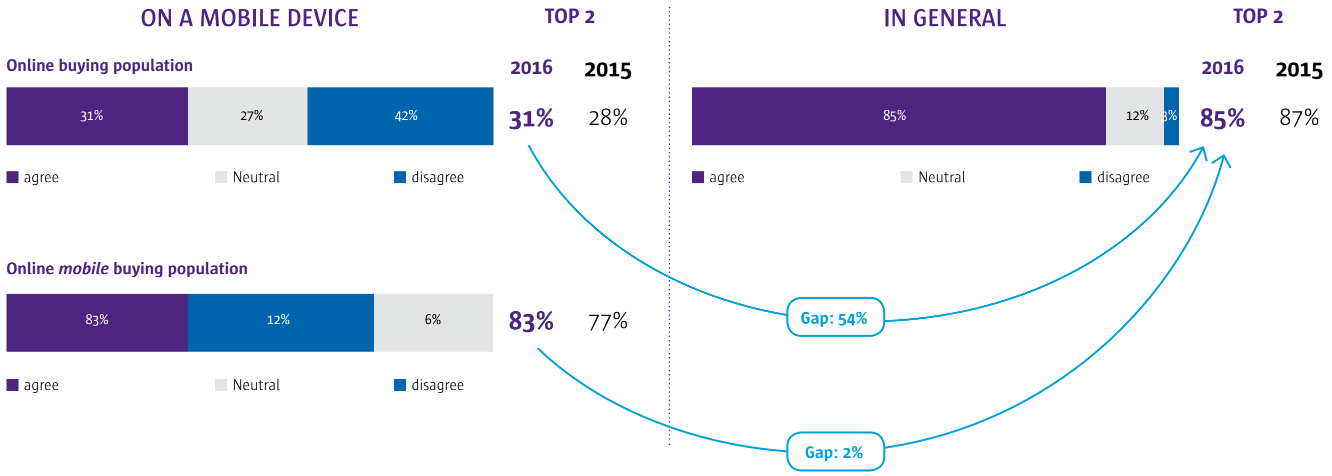
N = 1509 / F = None

Mobile purchases

Future mobile purchases

Q: In future, will you buy new products/services on the Internet on a mobile device (e.g. smartphone or tablet)?

FUTURE INTENTION TO BUY NEW PRODUCTS/SERVICES



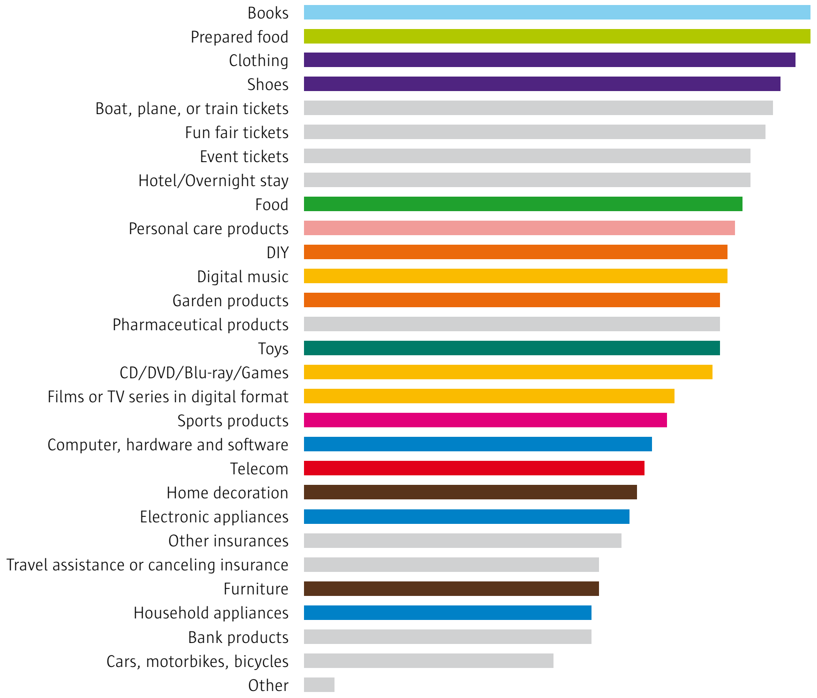
N = 1509 / F = None

Mobile purchases

Intended purchase of new products via mobile

Q: Which of the following products/services would you consider purchasing on a mobile device (e.g. smartphone, tablet) in the coming 12 months?

Strongest increases in future intention to buy: personal care, DIY, garden, pharmaceutical products



	2016	Evolution 2016-2015
Books	67%	+9%
Prepared food	67%	+10%
Clothing	65%	+2%
Shoes	63%	+10%
Boat, plane, or train tickets	62%	-3%
Fun fair tickets	61%	+4%
Event tickets	59%	-2%
Hotel/Overnight stay	59%	-1%
Food	58%	+3%
Personal care products	57%	+14%
DIY	56%	+19%
Digital music	56%	+1%
Garden products	55%	+14%
Pharmaceutical products	55%	+21%
Toys	55%	-3%
CD/DVD/Blu-ray/Games	54%	-1%
Films or TV series in digital format	49%	+12%
Sports products	48%	+9%
Computer, hardware and software	46%	+6%
Telecom	45%	0%
Home decoration	44%	+4%
Electronic appliances	43%	+8%
Other insurances	42%	+21%
Travel assistance or canceling insurance	39%	+2%
Furniture	39%	+7%
Household appliances	38%	+2%
Bank products	38%	-1%
Cars, motorbikes, bicycles	33%	0%
Other	4%	-2%

- Fashion = +5%
- Interior = +7%
- DIY & Garden = +15%

- Fashion
- Books
- Electronic appliances
- Entertainment
- Telecom
- Health & Beauty
- Interior
- Food
- Prepared food
- Sports
- DIY
- Toys
- Other

N = 449 / F = If considering buying via mobile in the future

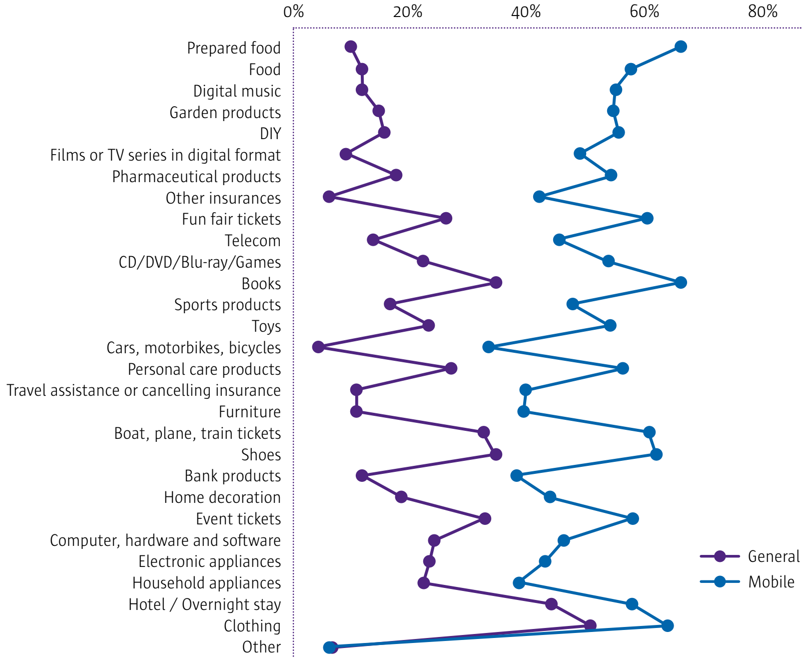
Mobile purchases

Potential growth: stronger amongst mobile buyers

Future intention to buy

Q: Which of the following products would you consider purchasing online in the coming 12 months?

Q: Which of the following products/services would you consider purchasing on a mobile device (e.g. smartphone, tablet) in the coming 12 months?



	GENERAL		MOBILE	
	2016	Evolution 2016-2015	2016	Evolution 2016-2015
Prepared food	8%	+2%	67%	+11%
Food	10%	-3%	58%	+4%
Digital music	10%	0%	56%	0%
Garden products	13%	+2%	55%	+14%
DIY	14%	+1%	56%	+19%
Films or TV series in digital format	7%	-1%	49%	+12%
Pharmaceutical products	16%	+4%	55%	+21%
Other insurances	4%	-1%	42%	+21%
Fun fair tickets	25%	+4%	61%	+4%
Telecom	12%	-2%	45%	+1%
CD/DVD/Blu-ray/Games	21%	-2%	54%	-1%
Books	34%	-4%	67%	+10%
Sports products	15%	+1%	48%	+9%
Toys	22%	0%	55%	-3%
Cars, motorbikes, bicycles	2%	-1%	33%	-1%
Personal care products	26%	0%	57%	+14%
Travel assistance or cancelling insurance	9%	-1%	39%	+2%
Furniture	9%	0%	39%	+7%
Boat, plane, train tickets	32%	-8%	62%	-4%
Shoes	34%	+1%	63%	+10%
Bank products	10%	-4%	38%	-1%
Home decoration	17%	+1%	44%	+4%
Event tickets	32%	-7%	59%	-3%
Computer, hardware and software	23%	-2%	46%	+6%
Electronic appliances	22%	-1%	43%	+8%
Household appliances	21%	-1%	38%	+3%
Hotel / Overnight stay	44%	-6%	59%	-1%
Clothing	51%	-1%	65%	+2%
Other	5%	0%	4%	-2%

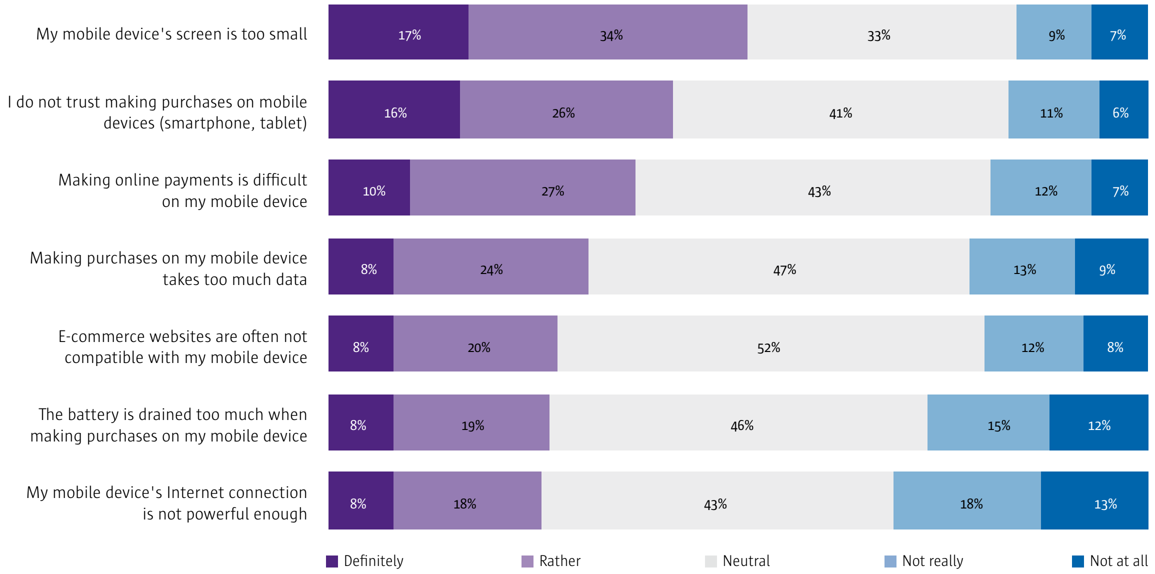
N= 1509 / F= If considering buying on the internet

Mobile purchases

Payment & connection problems slide back

Barriers for making mobile purchases

Q: To what extent do you agree with the following statements? (Top 2 scores)



	2016	Evolution 2016-2015
My mobile device's screen is too small	51%	+3%
I do not trust making purchases on mobile devices (smartphone, tablet)	41%	+1%
Making online payments is difficult on my mobile device	37%	-2%
Making purchases on my mobile device takes too much data	32%	+3%
E-commerce websites are often not compatible with my mobile device	28%	+2%
The battery is drained too much when making purchases on my mobile device	27%	+3%
My mobile device's Internet connection is not powerful enough	26%	-3%

N = 1136 / F = If not considering buying via mobile in the future

Internet problems

13%

report problem
related to online
purchase

-6%

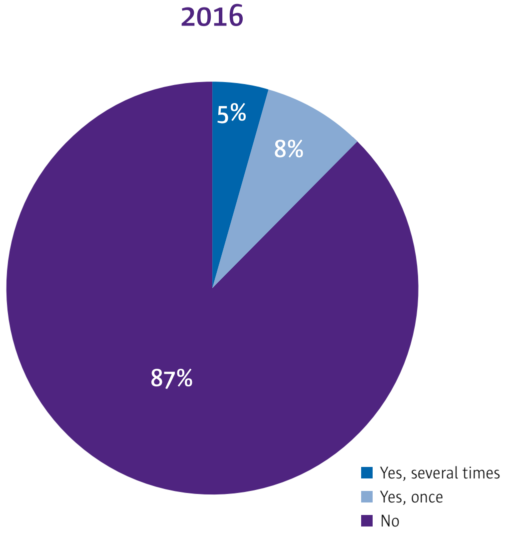
unsolved
problems

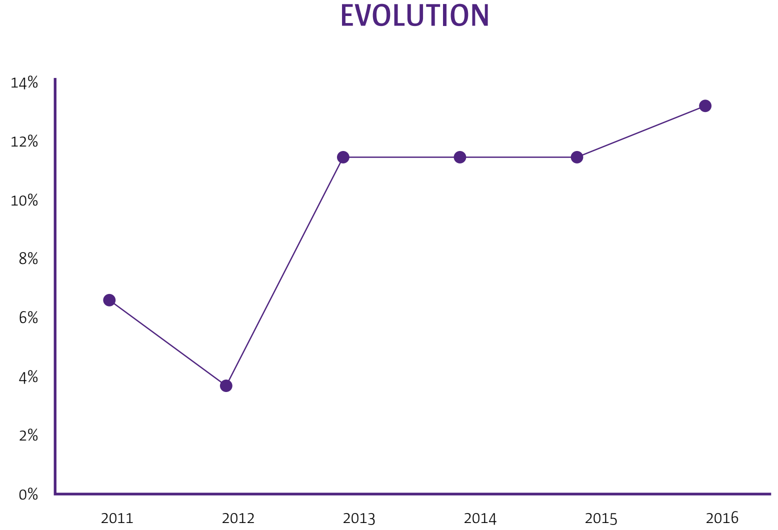
Internet problems

13% of online buyers confronted with problems in past 12 months

Exposure

Q: Have you been confronted with Internet problems related with your purchase of new products or services on the Internet in the past 12 months?



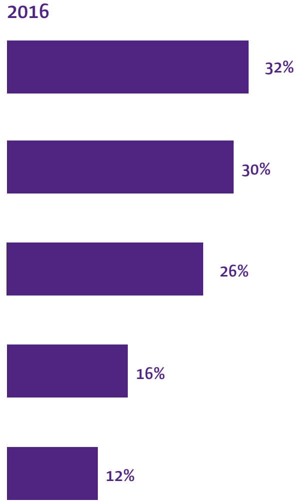


N = 1509 / F = None

Internet problems

Type of problems

Q: What is the best description for this Internet problem?



	2016	2015	2014	2013	2012	2011
Payment problems (e.g. hacked payment website)	32%	29%	39%	34%	49%	40%
Conscious faulty information on the website	30%	28%	26%	25%	17%	35%
Wrong / damaged / incomplete / missing delivery	26%	27%	21%	20%	25%	28%
Issue concerning return shipment	16%	15%	9%	20%	7%	11%
Other	12%	13%	16%	15%	24%	12%

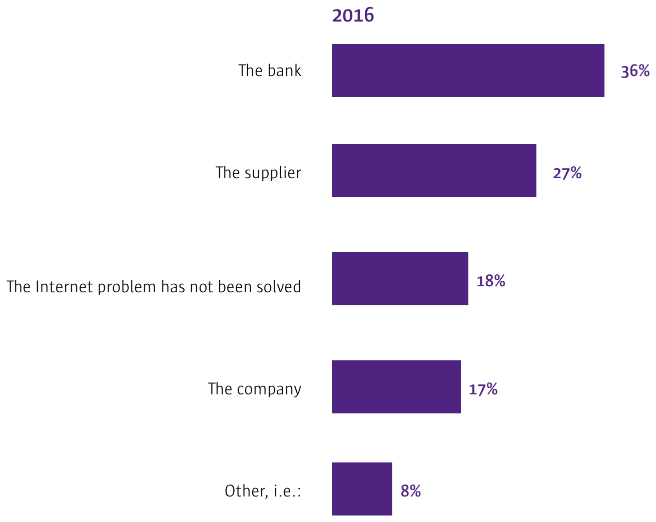
32% of problems linked to payment

N = 196 / F = Confronted with internet problem in past 12 months

Internet problems

Issue handling

Q: Who solved this Internet problem?



	2016	2015	2014	2013	2012	2011
The bank	36%	28%	31%	26%	38%	17%
The supplier	27%	19%	20%	15%	11%	22%
The Internet problem has not been solved	18%	24%	26%	26%	29%	32%
The company	17%	17%	20%	17%	18%	22%
Other, i.e.:	8%	17%	4%	17%	13%	19%

Unresolved problems: -6%

N = 196 / F = Confronted with internet problem in past 12 months

E-commerce trends & attitude

goes showrooming,
then buys online

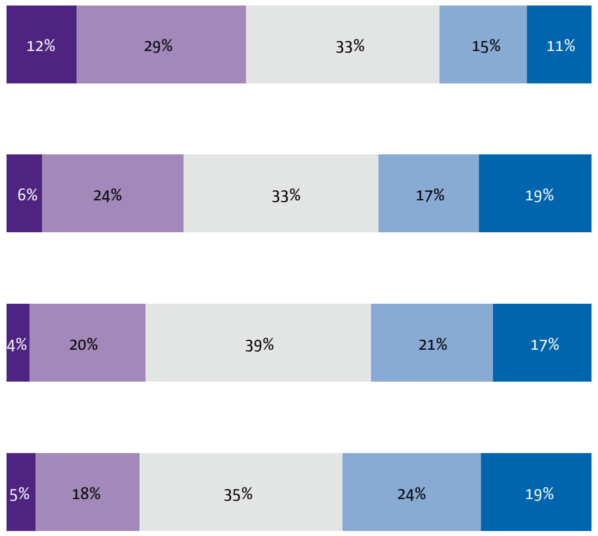
24%

searches online,
buys offline

45%

E-commerce trends & attitude

Q: To what extent are you willing to use the following new technologies in the coming 12 months?



TOP 2

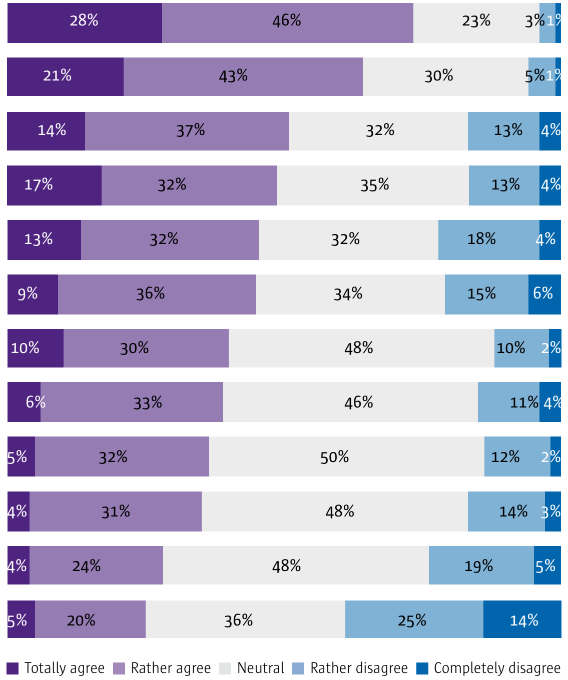
	2016	2015	2014	2013	2012	2011
Using group discount websites (e.g. Groupon), which offer a unique daily deal via a website	41%	42%	46%	47%	42%	38%
Using social media (e.g. Facebook) and word of mouth advertising to get a price reduction for my online purchases	31%	29%	32%	33%	28%	27%
Using location-based services (e.g. offers of shops in the vicinity of your mobile phone / smartphone)	24%	23%	26%	24%	20%	21%
Using a mobile site or application on the smartphone for mobile purchases whilst on the road	23%	22%	22%	17%	15%	15%

N = 1509 / F = None

E-commerce trends & attitude

73% want to follow order status

Q: To what extent do you agree with each of the following statements?



TOP 2

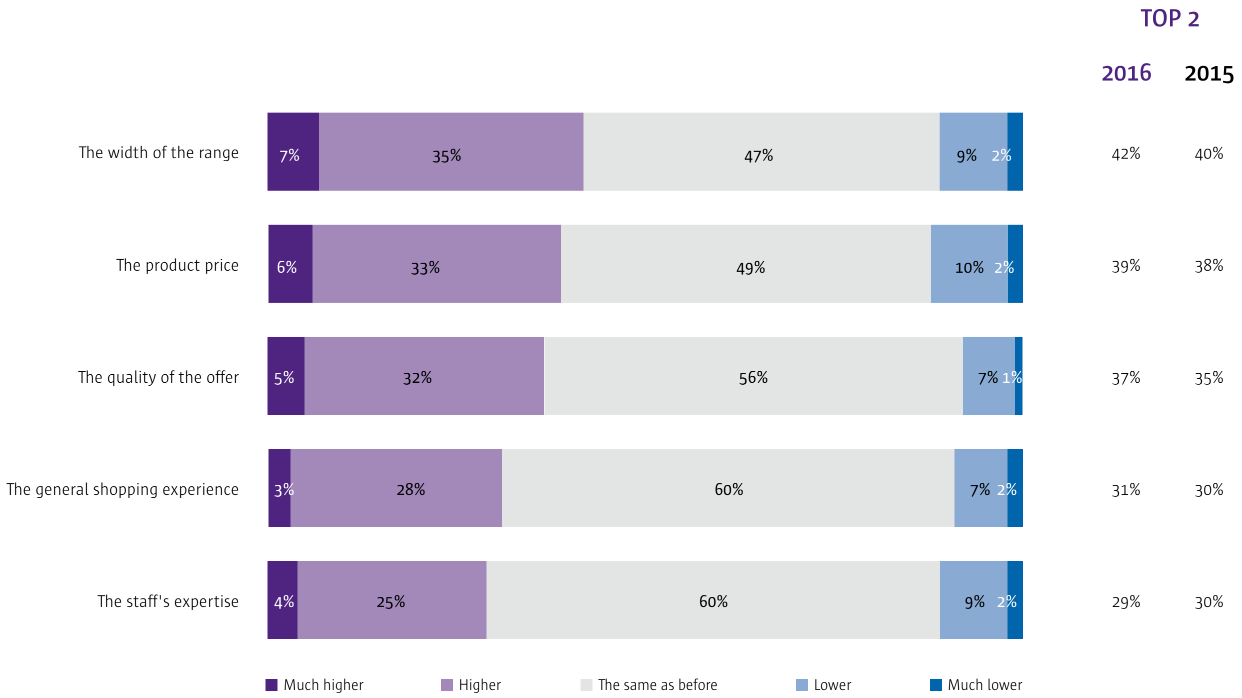
	2016	2015	2014
When I order a product online or have a repair done online, I would like to follow its status on the Internet	73%	72%	77%
Before going to the shop to buy a product, it should be possible to consult online whether the product is available	64%	62%	67%
When I shop online, I mainly do so by targeting specific purchases because I am looking for something, not for fun	51%	49%	53%
I dislike it when I buy several objects on the same website and at the exact same time, and then they arrive in different packs, possibly not even on the same day	49%	51%	N/A
When I go shopping (e.g. in the city, in a shopping centre) I am mainly doing so by targeting specific purchases because I am looking for something, not for fun	45%	45%	50%
Before I go shopping, I often search for inspiration online so I know exactly what I want to buy in the shop	45%	45%	N/A
Belgian fashion shops / chains are less advanced in Internet applications (e.g. online purchases) than our neighbouring countries	40%	40%	36%
I like it when a shop also has a kiosk where I can search for more information on the products in the shop and maybe even check out the offer that is not available in-store	39%	40%	N/A
The service given by an online webshop and an offline shop of the same chain are well adapted to each other	37%	35%	40%
The offer of the online webshop and the offline shop of the same chain are well adapted to each other	35%	36%	38%
The experience I have with online web shops and the offline shop of the same chain is identical	28%	27%	31%
I often go shopping, simply to get inspired and see ideas; I later buy online what I thought was interesting in the shop	24%	23%	N/A

N = 196 / F = Confronted with internet problem in past 12 months

E-commerce trends & attitude

Q: To what extent have your expectations been lower / higher compared to the offline store, compared to 5 years ago?

Width of range more important online than in store



N = 1509 / F = None