

E-commerce Belgium 2017



comeos



H&S Consu (H&S)

Introduction



Dominique Michel, CEO Comeos

Ten years ago we hardly knew what e-commerce was. Today, our 7th e-commerce study reveals that one in two users couldn't do without it.

Although the market is mature with 74% users, we haven't yet reached the limit. Our research shows that 16% of consumers still have doubts about making online purchases.

Let's work together to do everything we can to convince this group.

Dominique Michel

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Colophon

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OBJECTIVES & METHODOLOGY



You didn't go shopping this week?
It'll be a cheap month then??!



Objectives & Methodology

Background

Comeos represents **Belgian trade & services**. Its members are active in 16 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

Method: Online survey
Recruitment: Online research panel
Fieldwork period: 25th March – 6th April 2017
Interview length: 20 minutes
Country: Belgium

Sample

n = 1805
Sample size was increased from 1500 to 1800 in order to increase the sample size per category.

Sample screening

Age: 15-70
Online purchases experience in last 12 months

Sample quota

Representative for Belgian population on language, gender and age

Used symbols

★ Sign. Different from at least one other target group (95% confidence level) ▲▼ Meaningful difference compared with total

Error margin

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

Comparisons with Comeos e-commerce in Belgium since 2011

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

Since 2011 the survey of the e-commerce trend report has not changed. Given the strong growth of the sector, the questionnaire has been actualized on 3 levels:

Broadening scope: from 20 to 68 subcategories, from 14 to 15 main categories (incl. 'pralines' in 2017)

Keep core structure, add relevant questions (eg return shipments, updating drivers & barriers, etc.) and remove old ones (eg 'ever' purchased, etc.)

Target group: as from 15 yo instead of 18 yo

Trends are still reported for all KPI's, though some evolutions are influenced by this change of scope. We do report these differences, because they represent reality (eg. 2016: fashion only based on 'clothes' and 'shoes'; 2017: extra subcategories added such as accessories, sunglasses, bags, etc.).

74%
of online population
makes online purchases





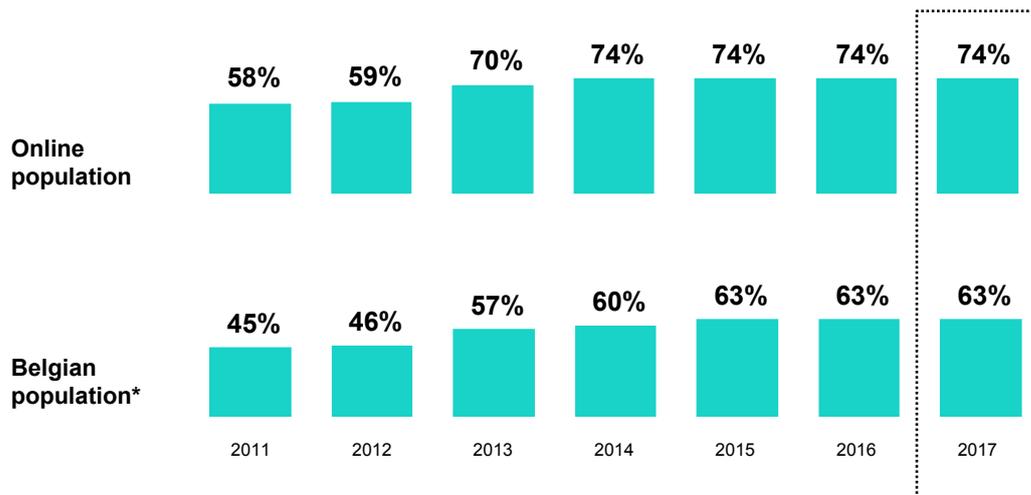
E-COMMERCE EXPERIENCE

E-commerce experience

Penetration last year

Market is mature

Q: Did you buy new non-secondhand products or services via the Internet in the past 12 months?



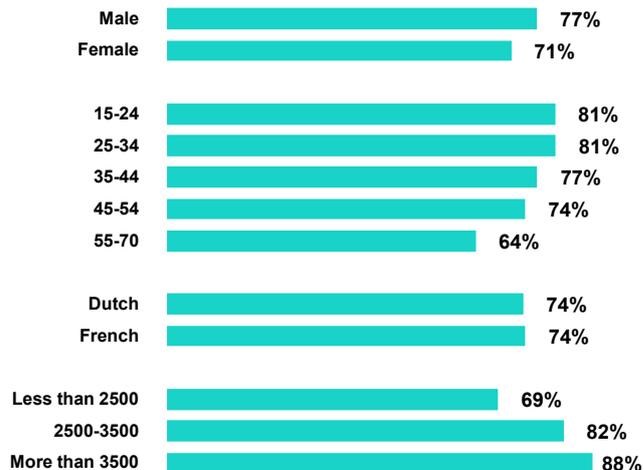
*Extrapolated to the Belgian population regarding the current internet-population (85% in 2014 based on <http://www.internetivestats.com>)

E-commerce experience

Penetration profile

Q: Did you buy new non-secondhand products or services via the Internet in the past 12 months?

Typical buyer is a
wealthy, young man

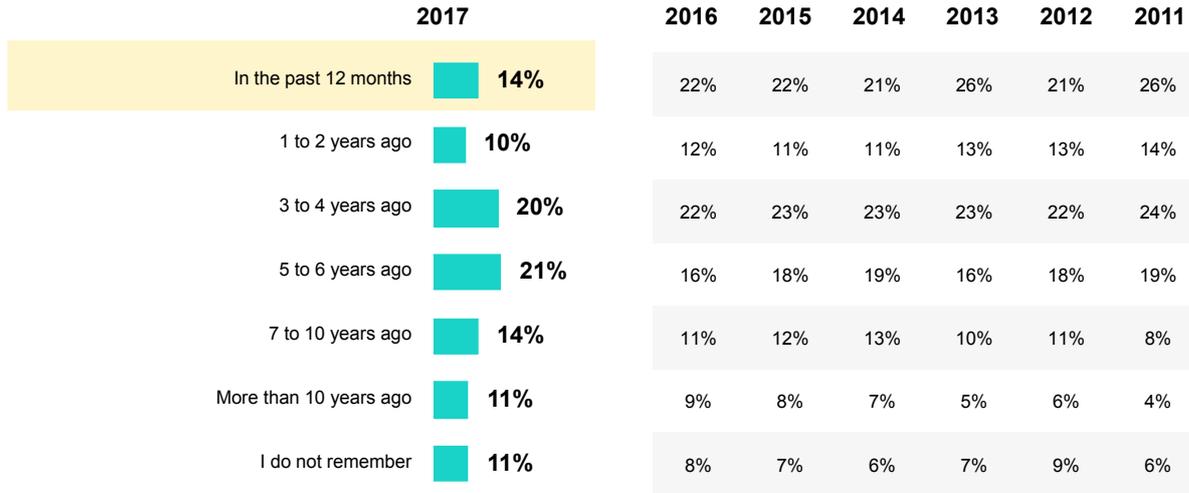


E-commerce experience

Experience

Big drop in first buyers

Q: When did you first buy something via the Internet?

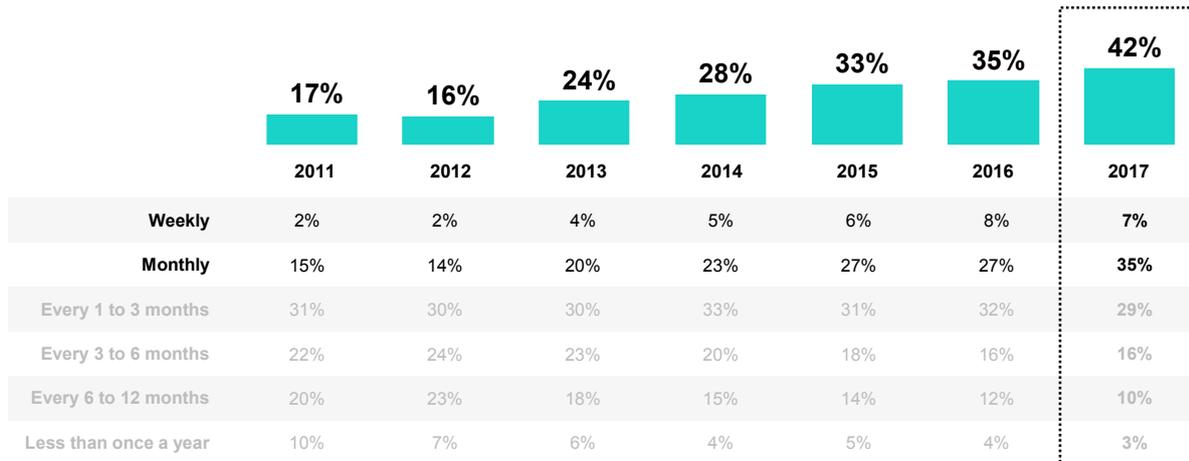


E-commerce experience

At least monthly purchases

Q: How frequently do you buy something via the Internet?

7% increase in regular purchases

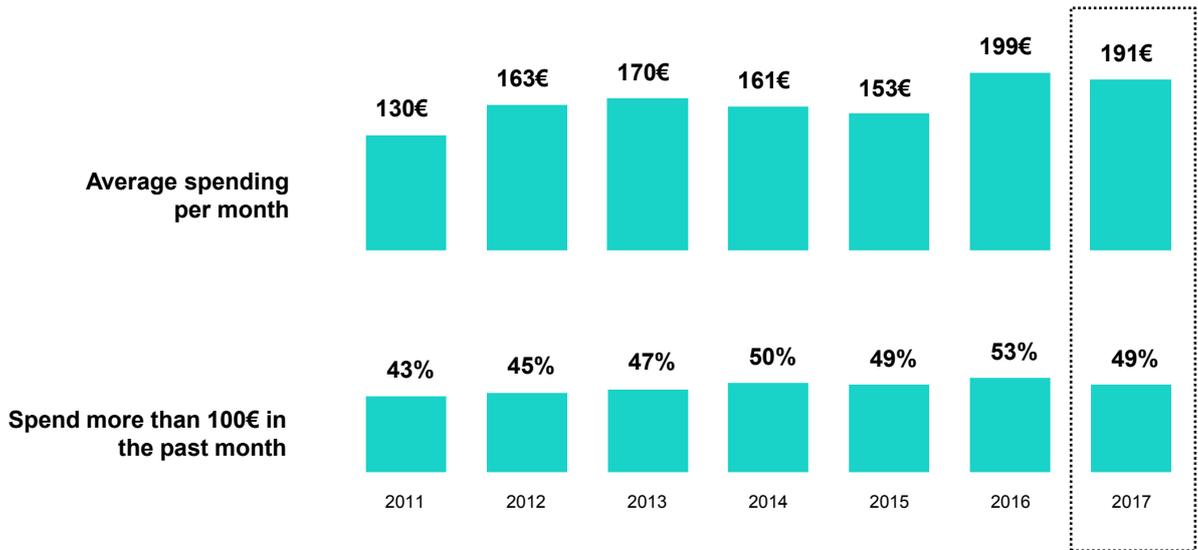


E-commerce experience

Current online shopping behavior

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

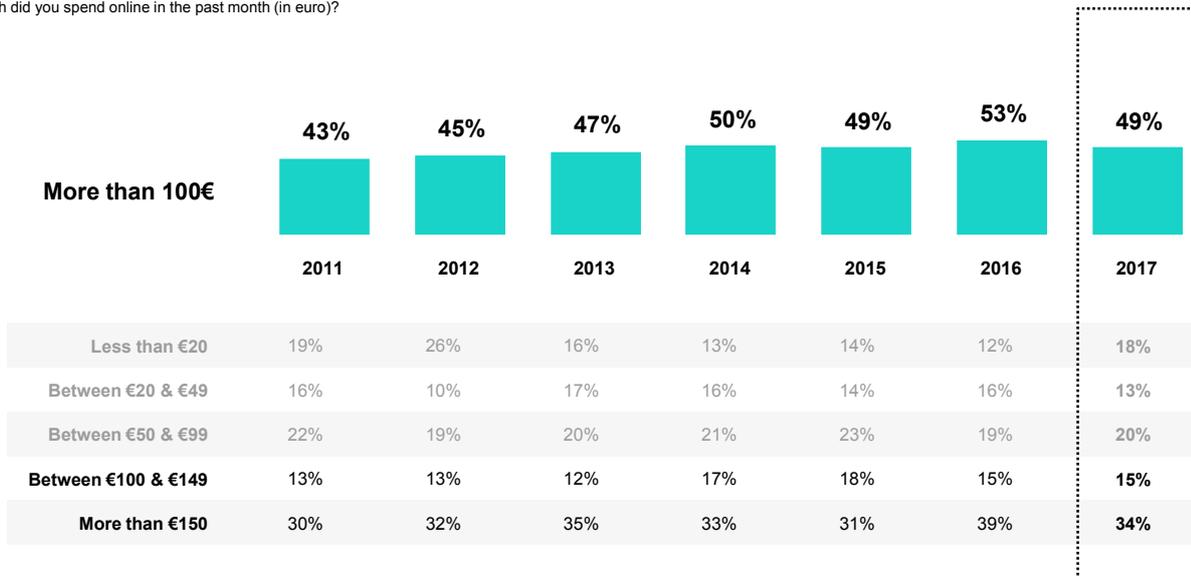
Declining average spending
balanced by increasing frequency



E-commerce experience

Current online shopping behavior

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

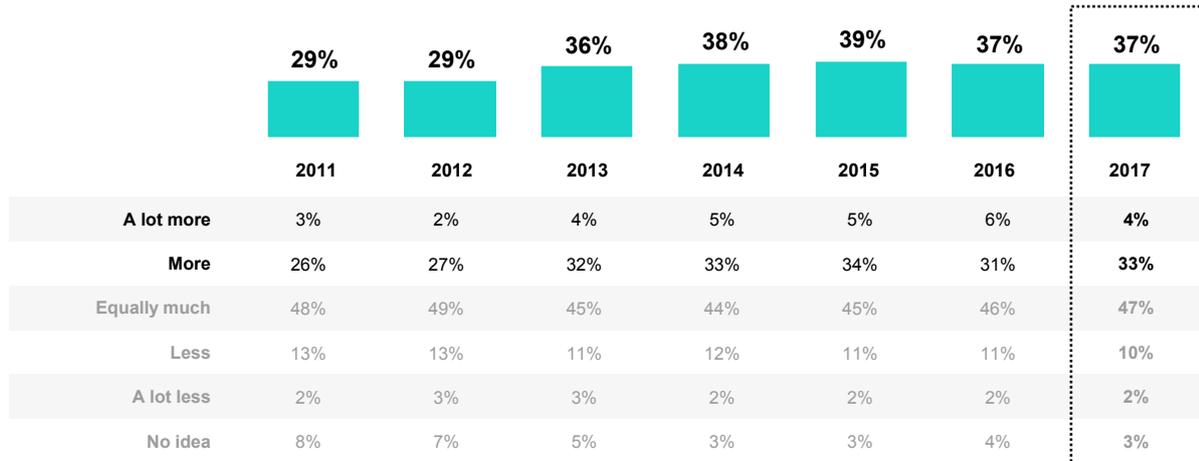


E-commerce experience

Evolution budget – spend more

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

Almost 4 out of 10 spends more than last year

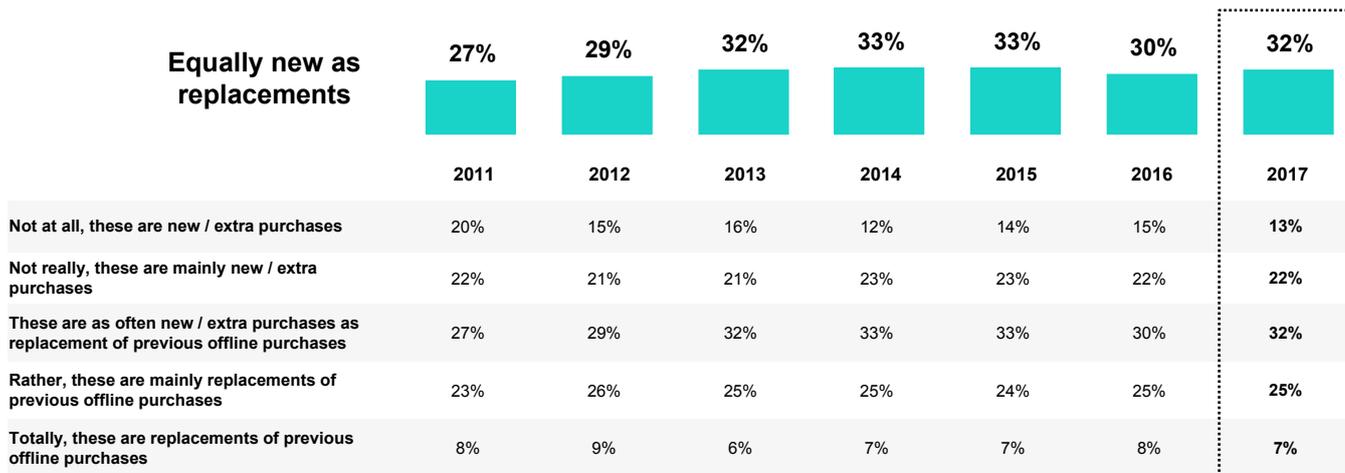


E-commerce experience

Substitution offline purchases

Physical shops remain important

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

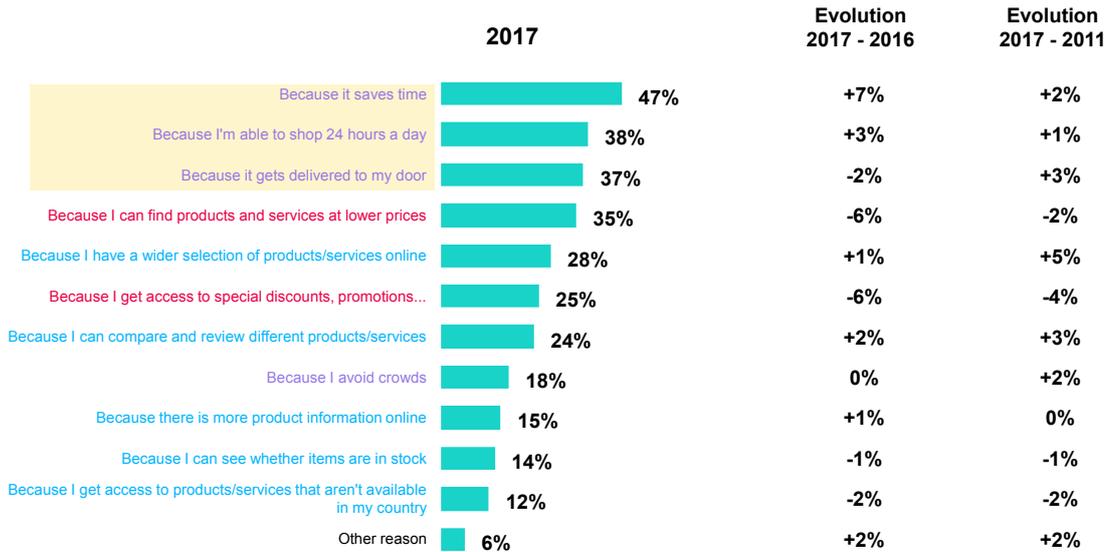


E-commerce experience

Drivers for e-commerce - evolution

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

Price no longer
main driver



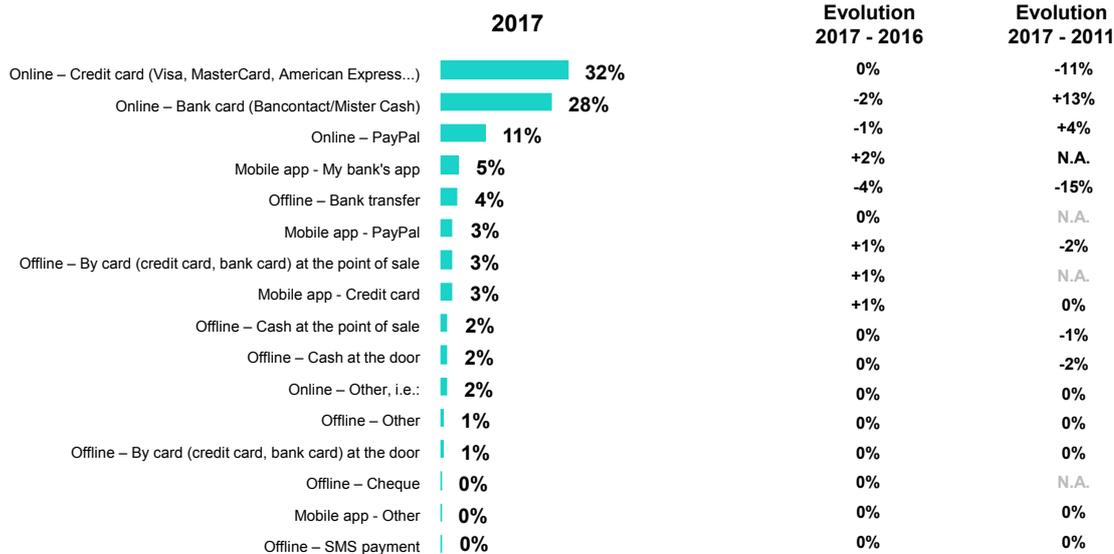
Time & Convenience
Money
Purchase Management

E-commerce experience

Ways of payments

Q: How did you pay for it?

Credit and debit cards
almost equally used

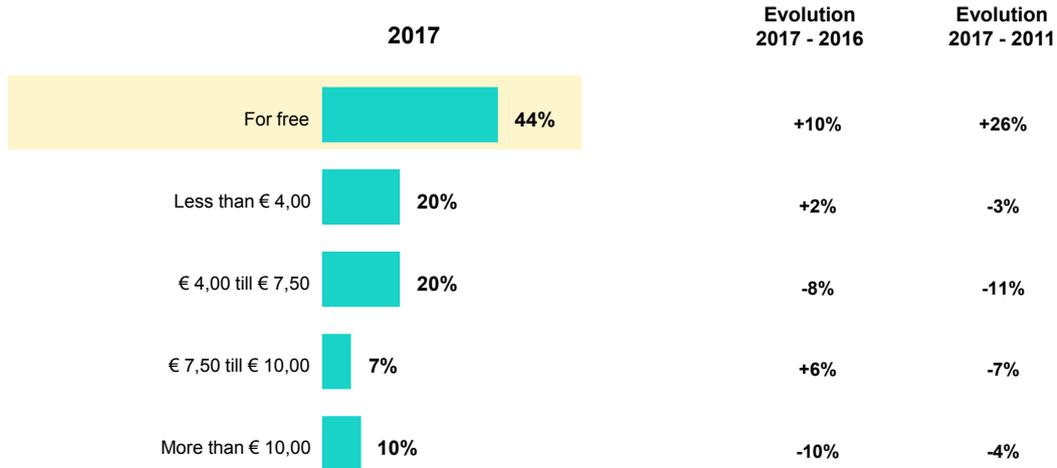


E-commerce experience

Delivery price - evolution

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

Almost 1 out of 2 customers expects free delivery

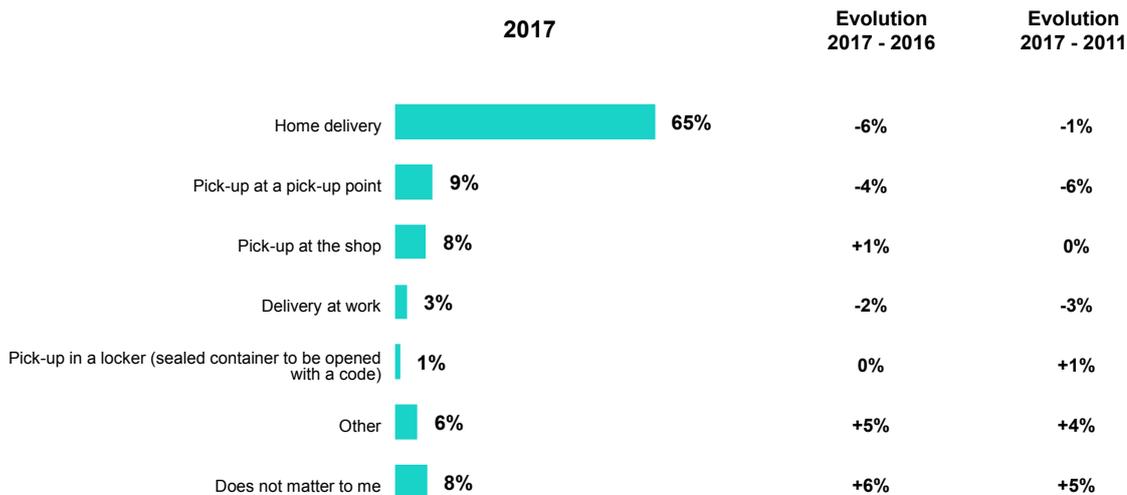


E-commerce experience

Delivery preference - evolution

Home delivery is king

Q: Which delivery method do you prefer for your online purchases ?

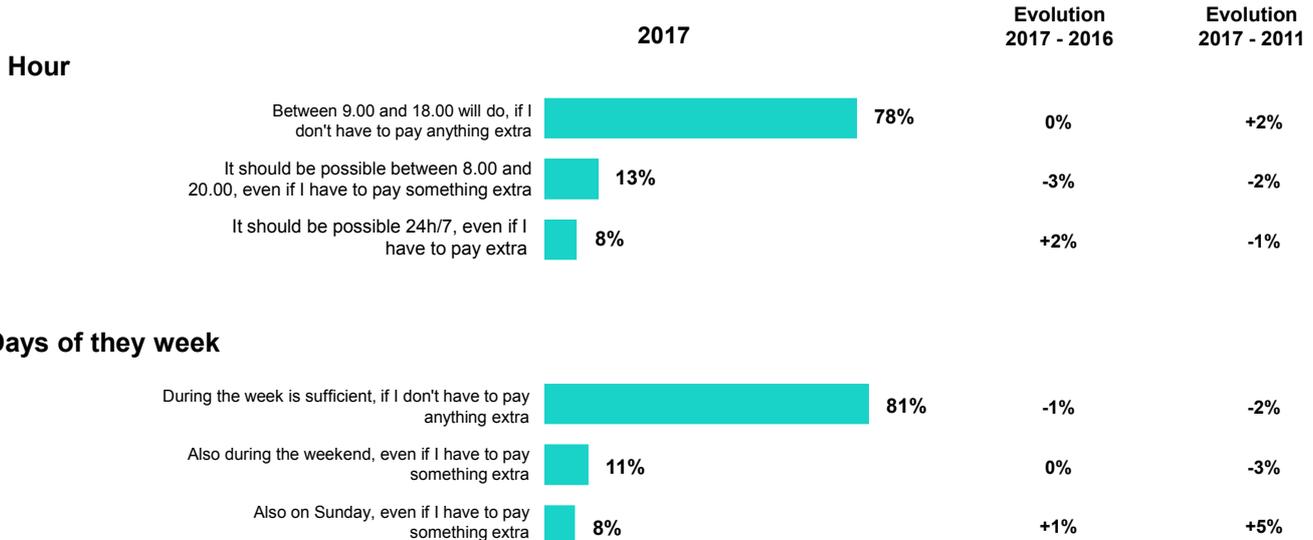


E-commerce experience

Delivery time - evolution

Q: When should it be possible to have your product delivered?

1 out of 5 expects delivery during the weekend



E-commerce experience

Website drivers - evolution

Q: Why did you use this type of website for your online purchase? Please indicate the 3 main factors.

Price less important
than before

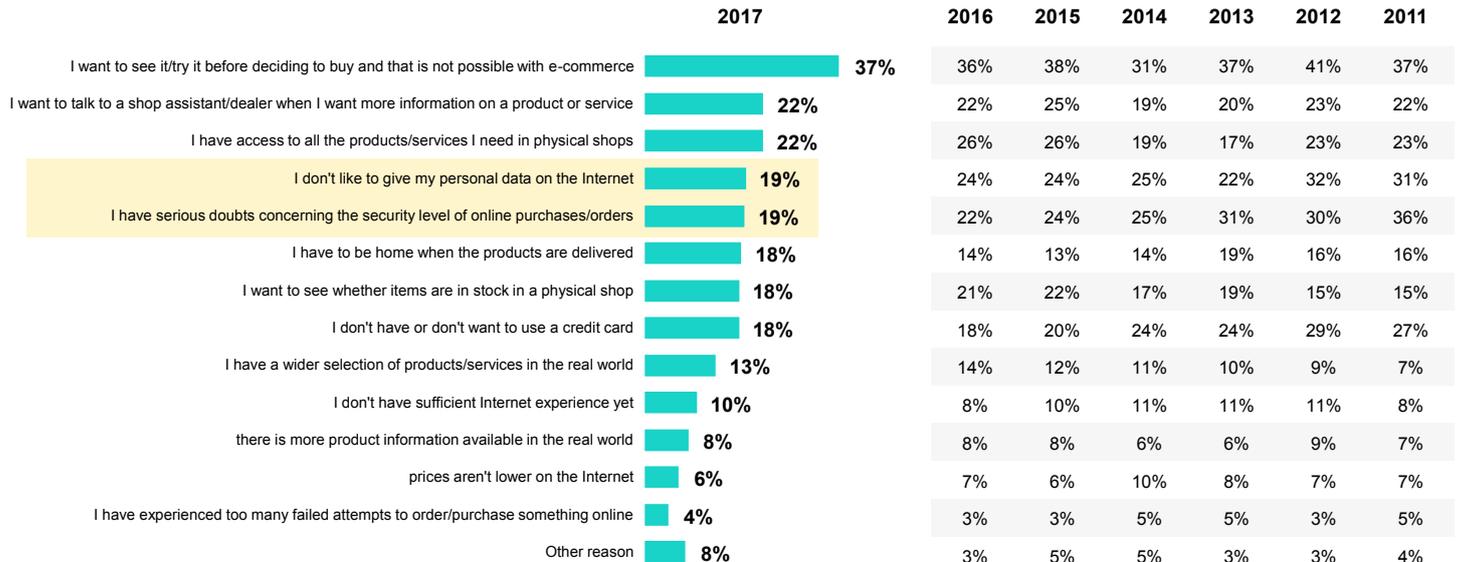
% indicated as the main factor of using the website		Evolution 2017 - 2016	Evolution 2017 - 2011
Price	21%	-4%	-10%
Satisfaction with previous experiences	8%	-2%	-4%
Quick delivery	7%	-1%	-3%
Product selection and availability	6%	-2%	-7%
Trust and safety	5%	0%	-3%
User-friendliness of the website	4%	0%	-2%
Low shipment costs	3%	-1%	0%
Accidental - just where I found it	3%	-1%	-3%
Recommended by a friend	2%	0%	-1%
Return or guaranty policy	2%	0%	-1%
Completeness of the product information	1%	0%	-1%
Other reason	2%	0%	-2%

E-commerce experience

Barriers

Security is less of an issue

Q: Please tick the 3 main reasons for you for not yet having bought new products or services online?



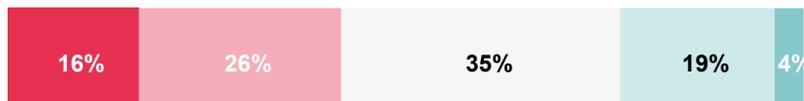
E-commerce experience

Future interest

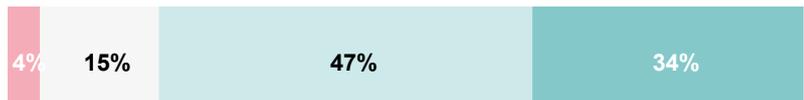
Q: Would you consider buying new products/services on the Internet in the future?
How likely are you to purchase other new products or services on the Internet in the future?

1 out of 4 who hasn't bought last year, considers doing it

Among consumers who never purchased online



Among consumers who buy online



■ Certainly not
 ■ Probably not
 ■ Neutral
 ■ Probably
 ■ Certainly

22%

**of online purchases are
made by mobile devices**

DEVICES

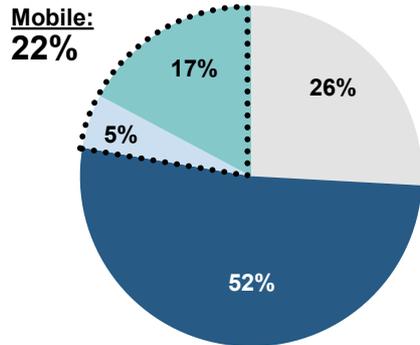


Devices

Devices used for purchasing

Q: Did you buy new non-secondhand products or services via the Internet in the past 12 months?

Almost one fourth of the online purchases are made on mobile devices



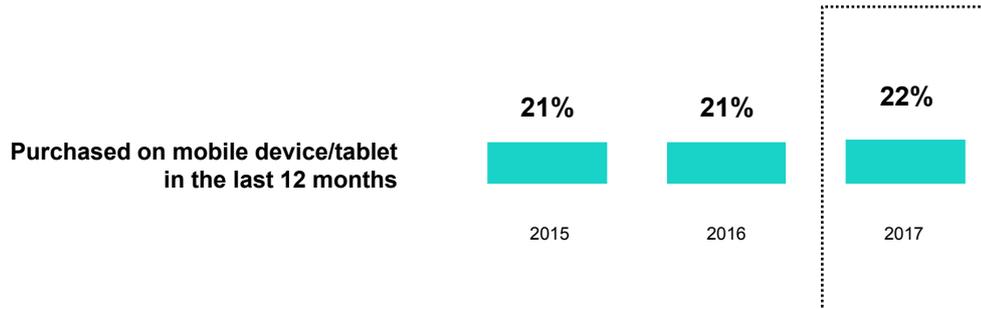
- Purchased **only** via computer/laptop
- Purchased **only** via smartphone/tablet
- Purchased via computer/laptop **and** smartphone/tablet
- Haven't purchased in the last 12 months

Devices

Mobile devices used for purchasing - evolution

Q: Did you buy new non-secondhand products or services via the Internet in the past 12 months?

Slight shift towards mobile

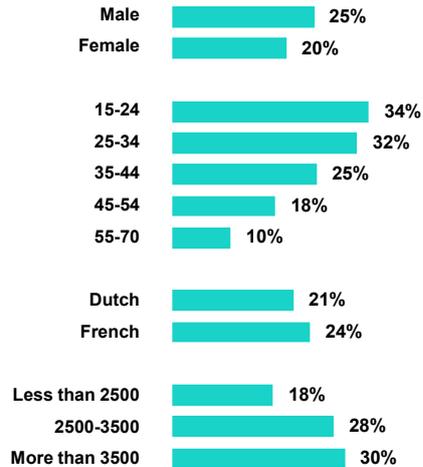


Devices

Penetration profile – mobile devices

Q: Did you buy new non-secondhand products or services via the Internet in the past 12 months?

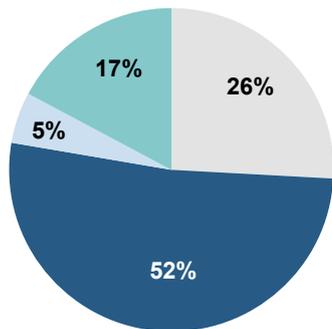
Typical buyer is a wealthy youngster



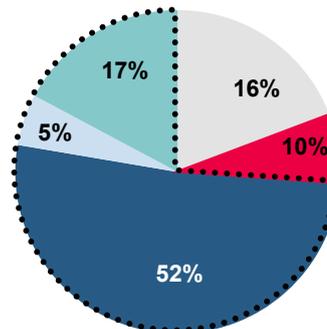
Devices

Mobile devices

Q: Did you buy new non-secondhand products or services via the Internet in the past 12 months?



- Purchased **only** via computer/laptop
- Purchased **only** via smartphone/tablet
- Purchased via computer/laptop **and** smartphone/tablet
- Haven't purchased in the last 12 months



- Purchased **only** via computer/laptop
- Purchased **only** via smartphone/tablet
- Purchased via computer/laptop **and** smartphone/tablet
- Haven't purchased in the last 12 months, but considering
- Haven't purchased in the last 12 months, **not** considering

Potential market:
90%

Absolute market:
74%

Relative market:
82%

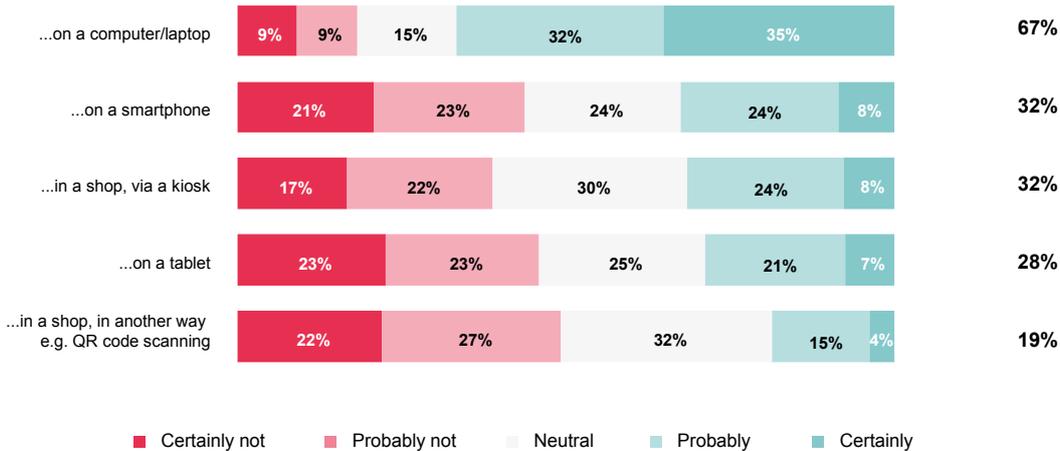
Devices

Future intention to buy

Q: In the future, would you consider buying new products/services via the Internet...

Computer remains preferred device for online purchases

% would certainly/
probably buy



Devices

Future intention to buy on mobile device

Q: In the future, would you consider buying new products/services via the Internet...

4 out of 10 intend to buy on mobile devices (+10%)

% would certainly/ probably buy on a smartphone or tablet

41%

2017

31%

2016

28%

2015



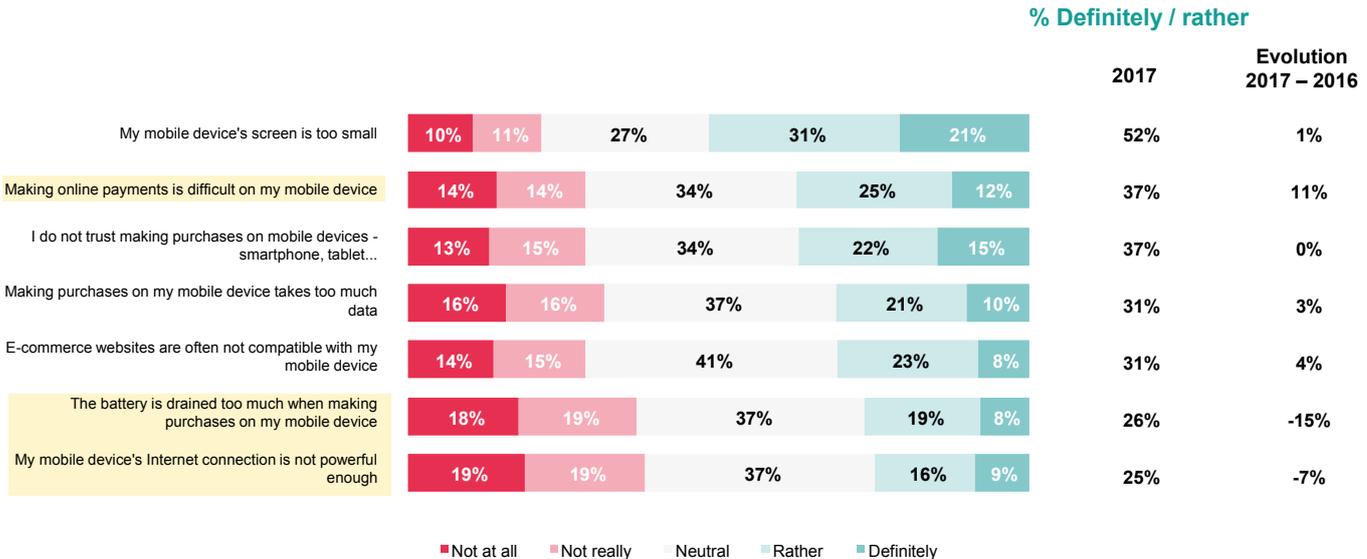
■ Certainly not
 ■ Probably not
 ■ Neutral
 ■ Probably
 ■ Certainly

Devices

Barriers for making mobile purchases

Q: To what extent does each of the following aspects stop you from making purchases through a mobile device?

Payment on mobile devices remains great concern



Wasn't this cupboard sold via the webshop?

Yes it was, we're sawing it up so it fits through the letterbox.



64%

fashion remains at the top

ONLINE PURCHASES

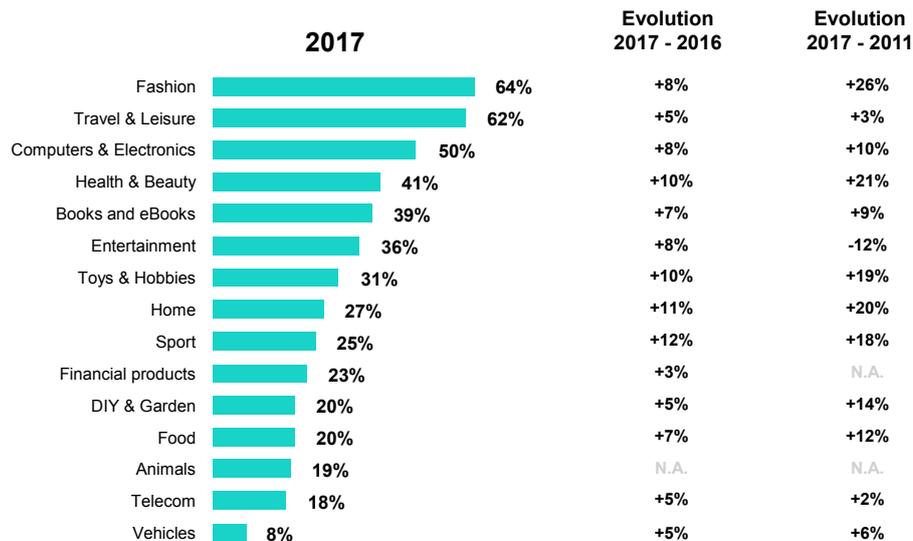


Online purchases

Current purchase new products

Q: Which new products or services did you buy via the Internet in the past 12 months?

Increase
in all categories



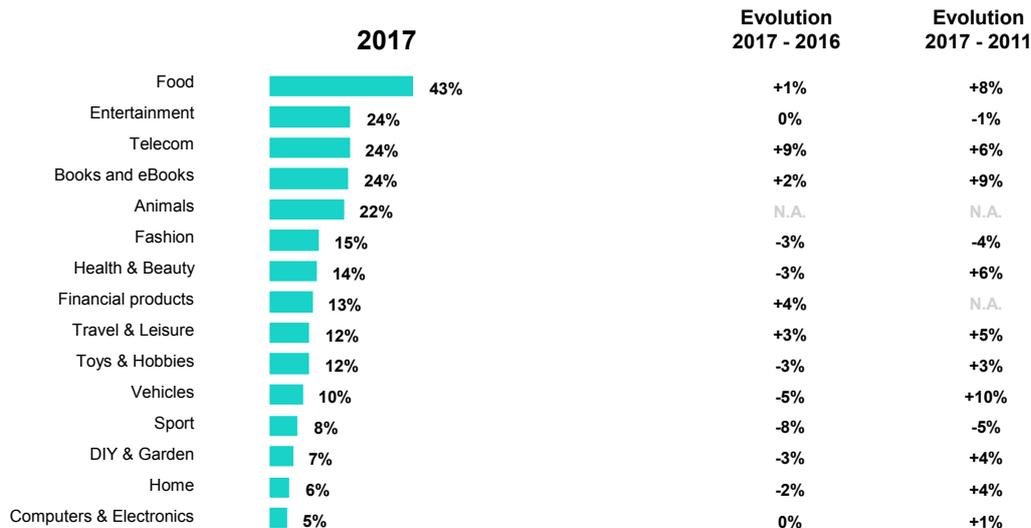
Remark: this year's list of subcategories has been broadened. See addendum.

Online purchases

Buying frequency more than 5 times

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

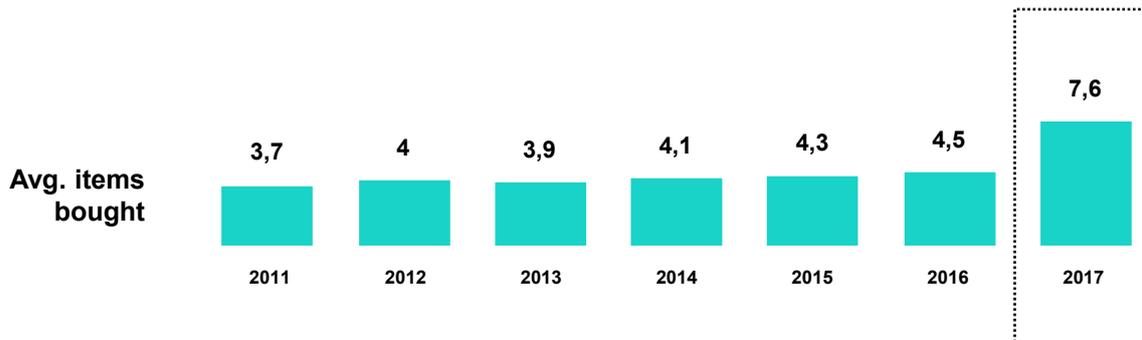
4 out of 10 frequently buys food online



Online purchases

Number of items bought

Q: How many new products or services did you buy via the Internet in the past 12 months?

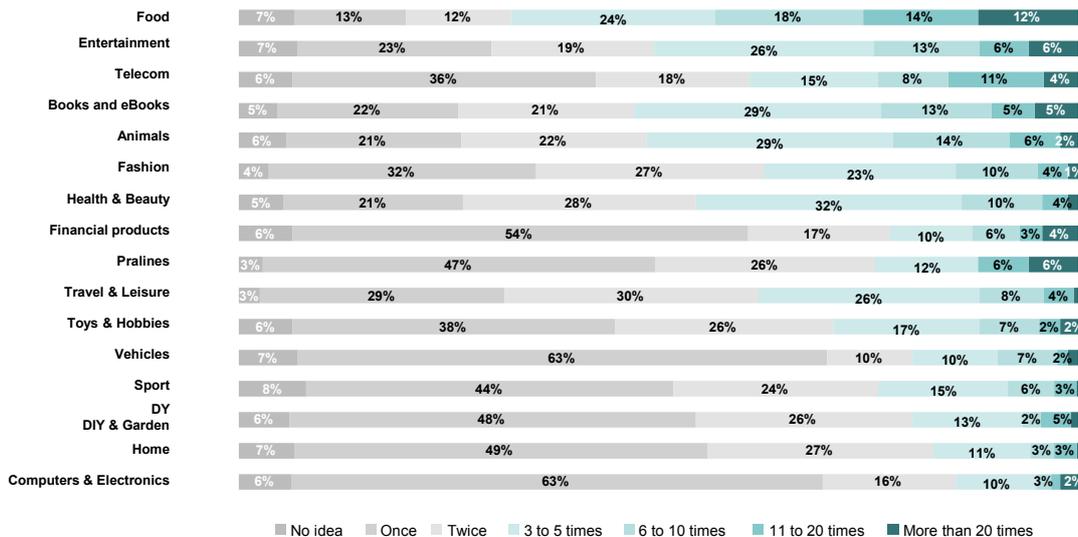


Remark: this year's list of subcategories has been broadened. See addendum.

Online purchases

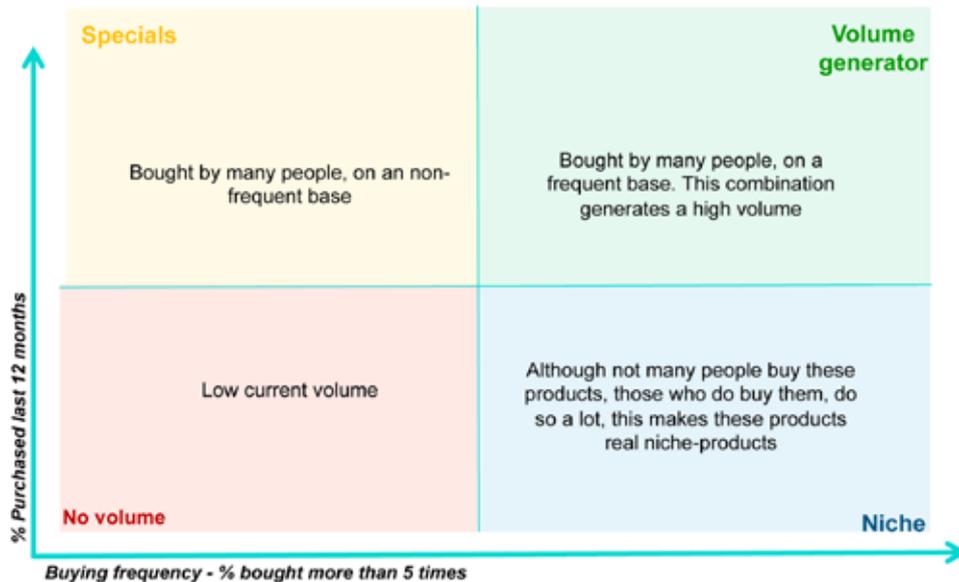
Frequency current online purchases

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



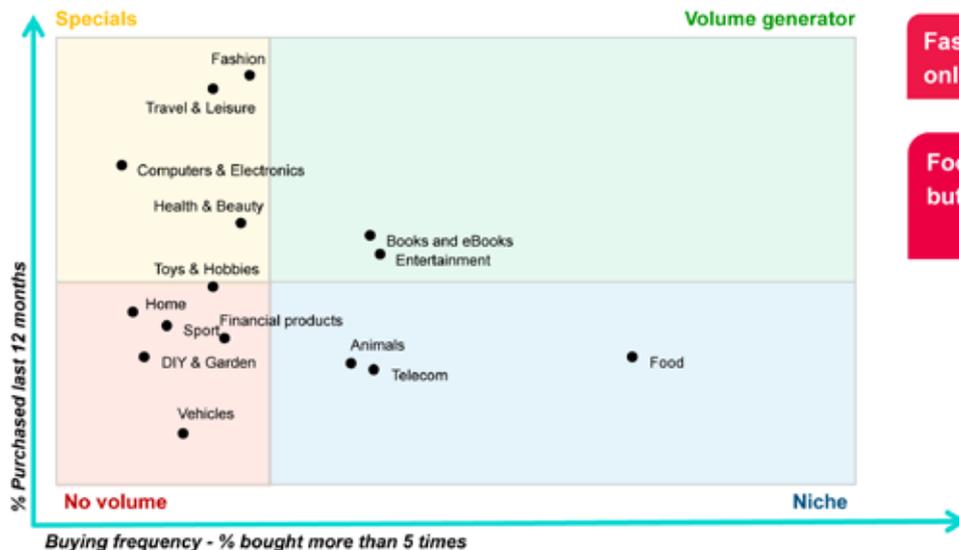
Online purchases

Quadrant explanation



Online purchases Quadrant 2017

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



Fashion : many people buy it online

Food : fewer people buy it, but they do it more often

"I am returning the 15-year-old Scottish whisky that I bought from you online. I had a terrible headache the day after ..."

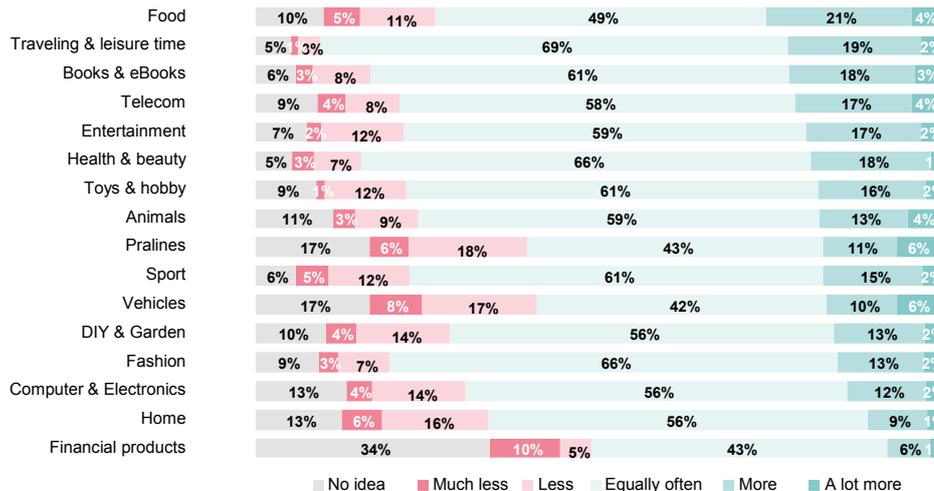


Online purchases

Future intention to buy

Q: Do you expect to buy products in this category of products more or less often online in the future?

Food has the greatest potential



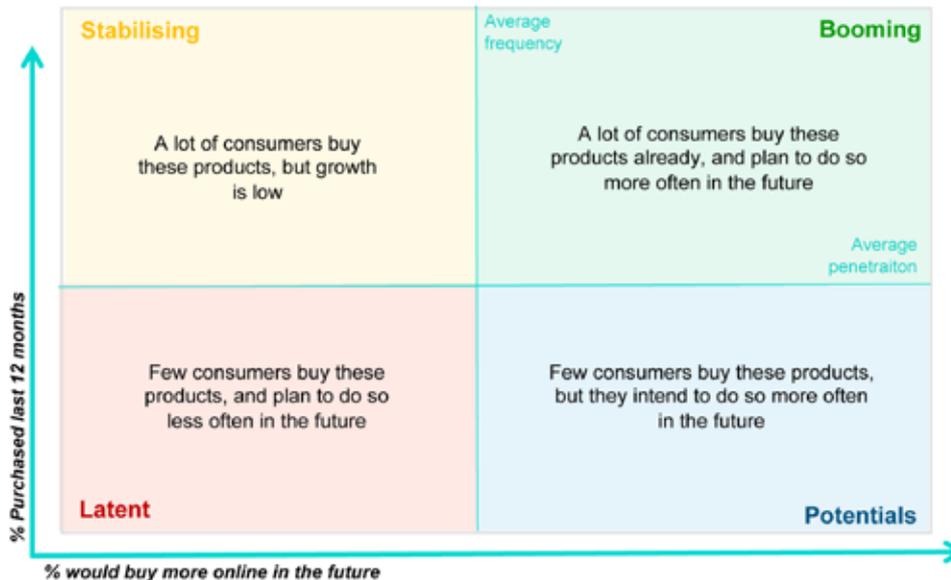
% would buy more

2017	2016
25%	12%
22%	23%
22%	28%
21%	16%
19%	23%
18%	25%
17%	18%
17%	N.A.
17%	N.A.
17%	19%
16%	26%
15%	20%
15%	27%
13%	22%
10%	15%
7%	24%

Online purchases

Quadrant explanation

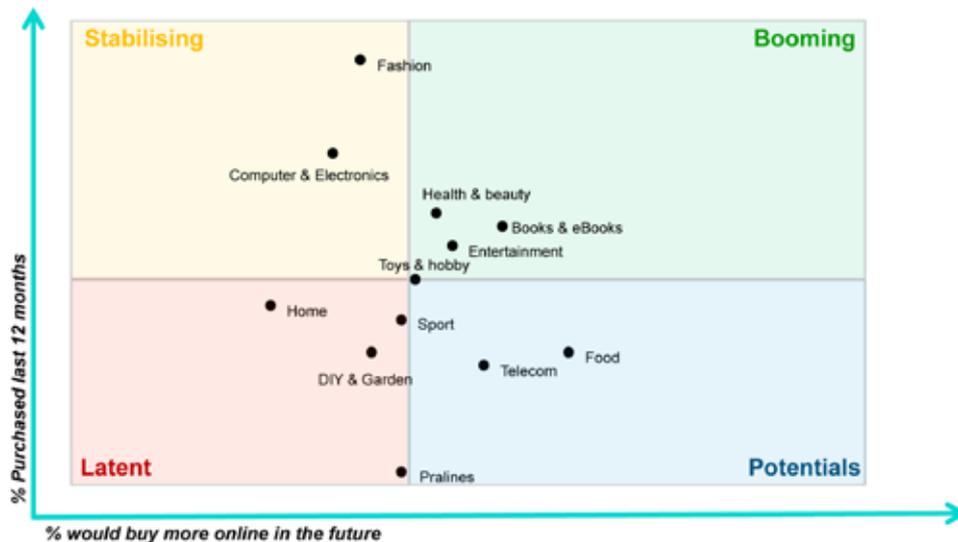
Q: Which new products or services did you buy via the Internet in the past 12 months? | Do you expect to buy <category> more or less often online in the future?



Online purchases

Quadrant 2017

Q: Which new products or services did you buy via the Internet in the past 12 months? | Do you expect to buy <category> more or less often online in the future?

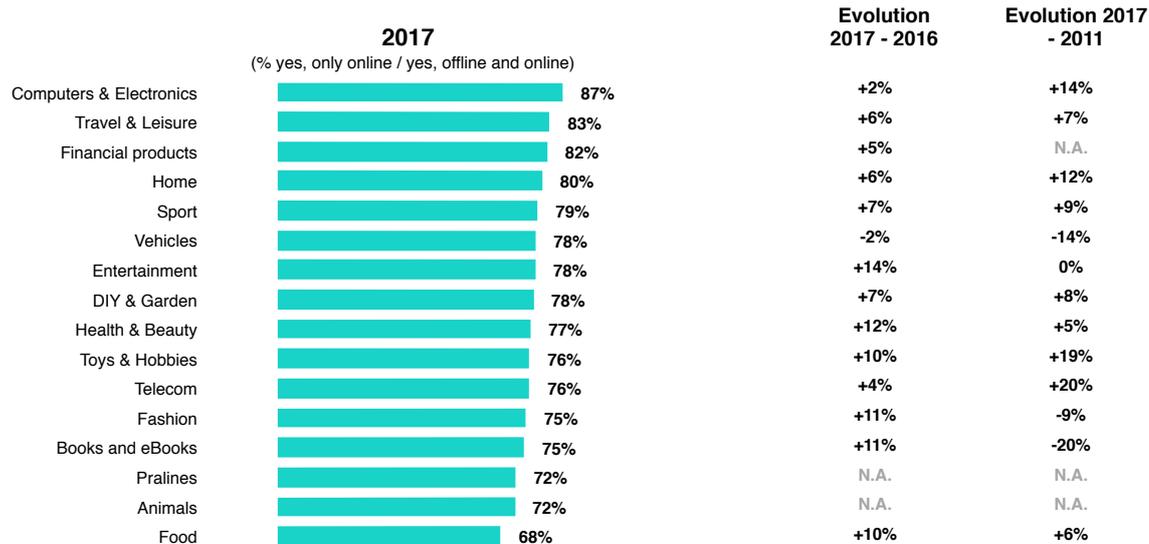


Online purchases

Information search

Online customer
is well informed

Q: To what extent did you search for information beforehand, either offline (e.g. in a shop, a product brochure) and/or online (e.g. via a website with product reviews, brand websites...)?



67%

**buys food online because
it saves time**

SECTOR FOCUS



Sector focus

Drivers for e-commerce – per category

Special discounts and promotions main driver for Health & Beauty

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

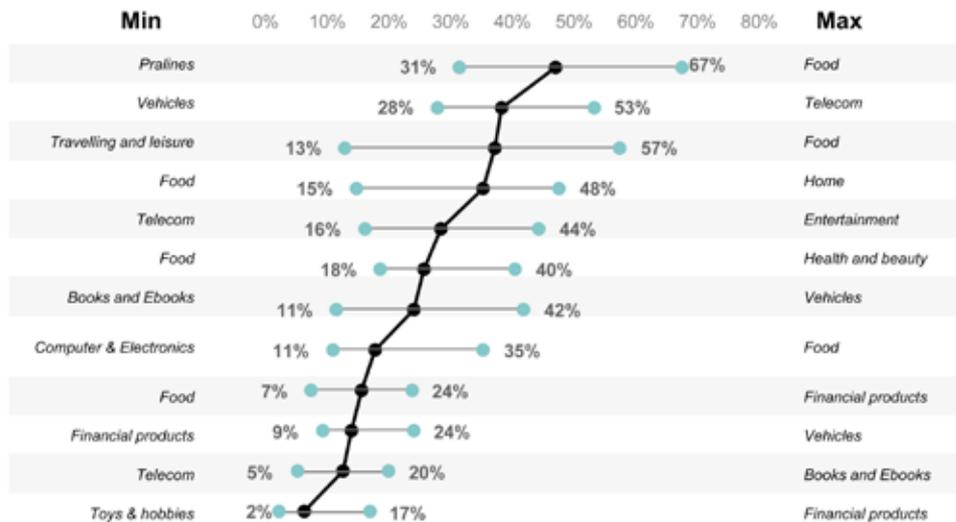
- Because it saves time
- Because I'm able to shop 24 hours a day
- Because it gets delivered to my door
- Because I can find products and services at lower prices
- Because I have a wider selection of products/services online
- Because I get access to special discounts, promotions...
- Because I can compare and review different products/services
- Because I avoid crowds
- Because there is more product information online
- Because I can see whether items are in stock
- Because I get access to products/services that aren't available in my country

Time & Convenience

Money

Purchase Management

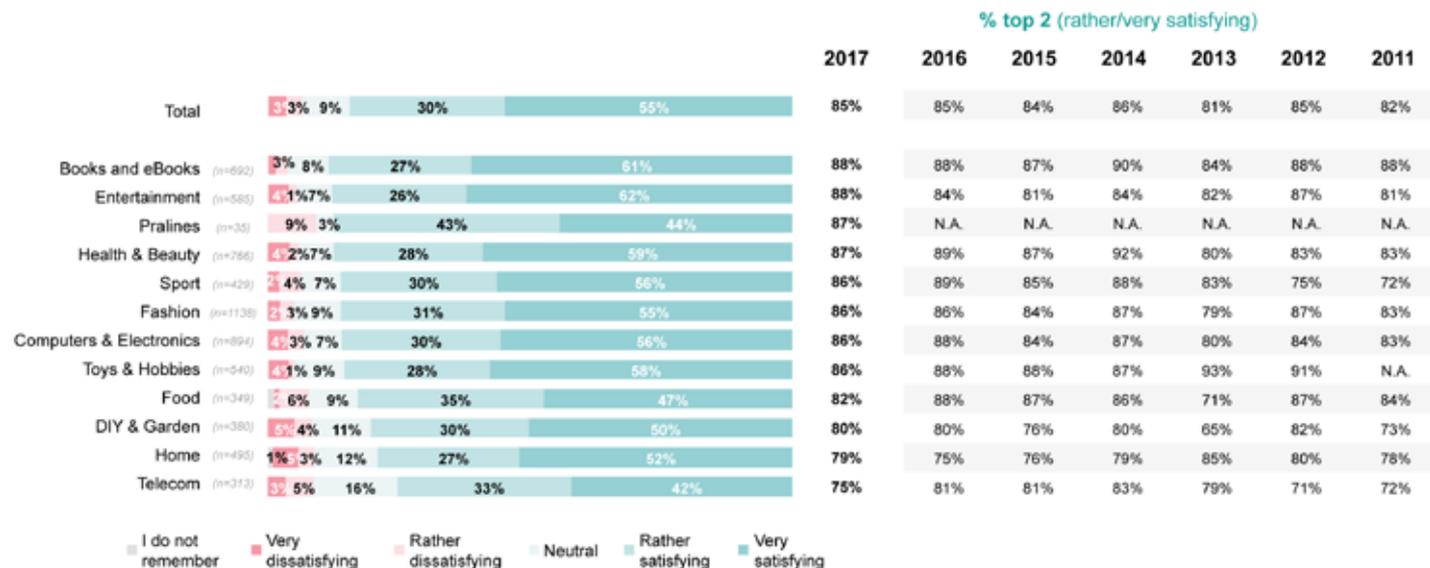
Other reason



Sector focus

Website Satisfaction

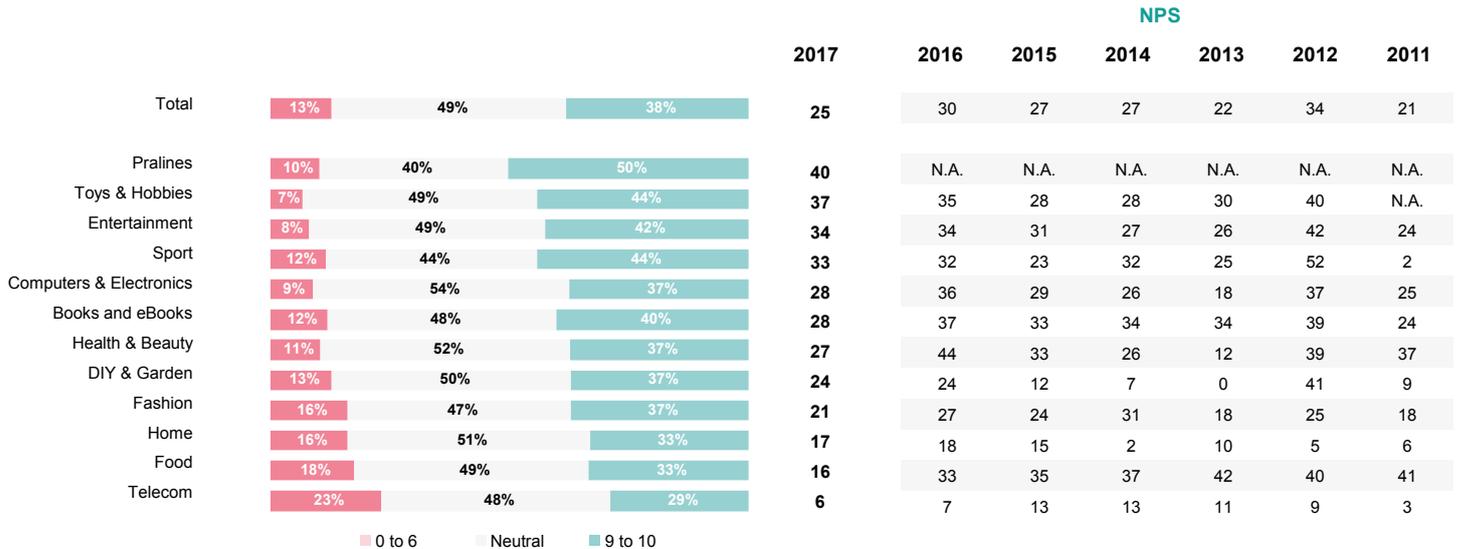
Q: How satisfied were you with using the e-commerce website after your most recent online purchase?



Sector focus

Website recommendation

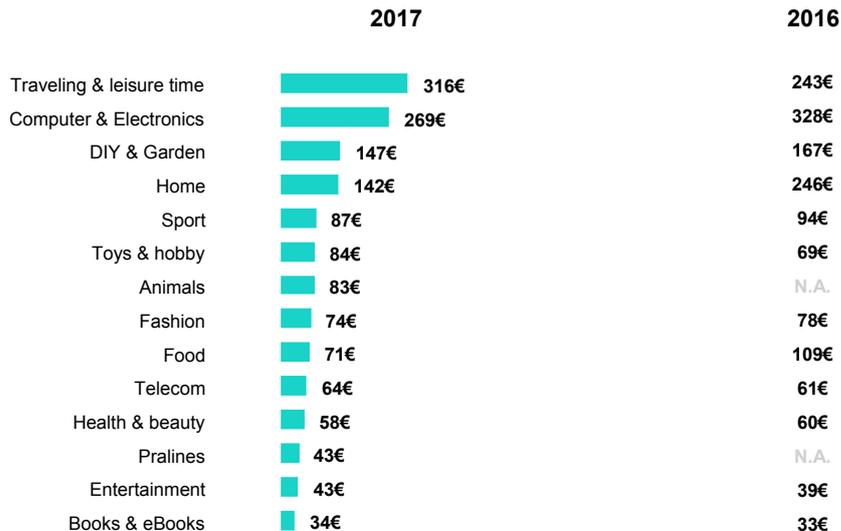
Q: How likely are you to recommend this type of website to a friend, on a scale from 0 to 10?



Sector focus

Purchase amount

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

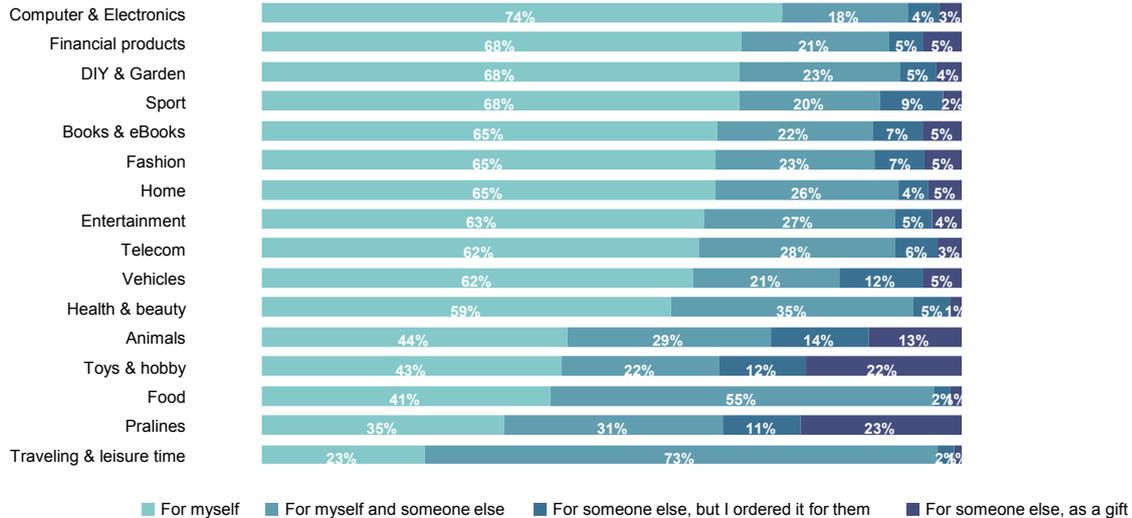


Sector focus

Who are you buying for

Q: When buying products of this category, was this for yourself or for someone else?

6 out of 10 buys Health & Beauty products for own use





E-COMMERCE TRUST & PROBLEMS





46%

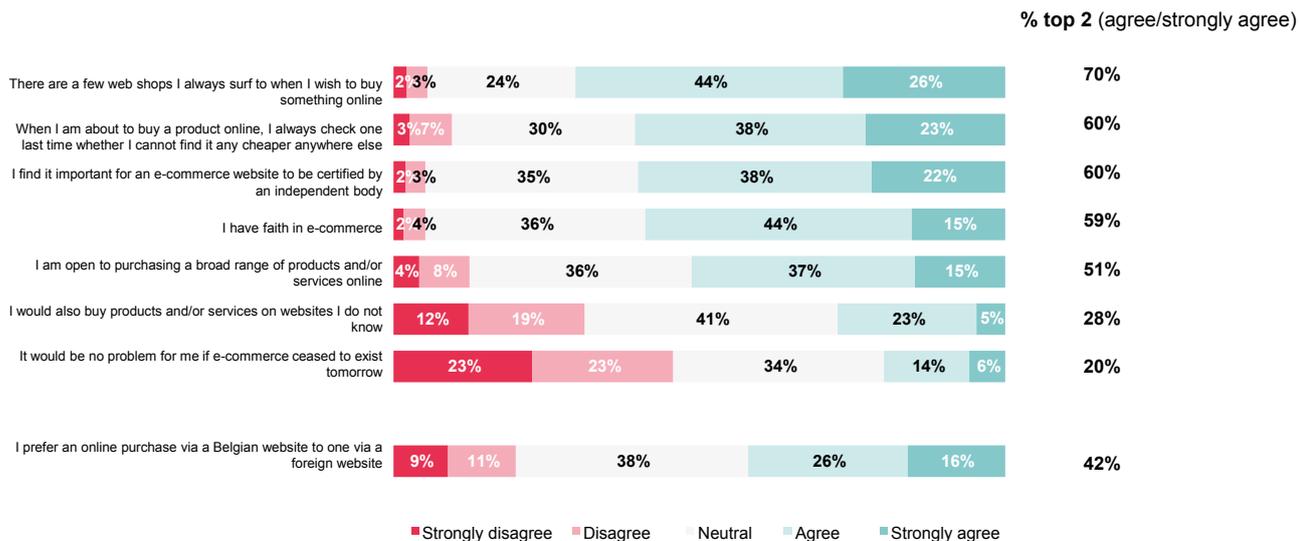
**couldn't live without
e-commerce**

E-commerce trust

Statements

6 out of 10 compares prices on other websites just before buying

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



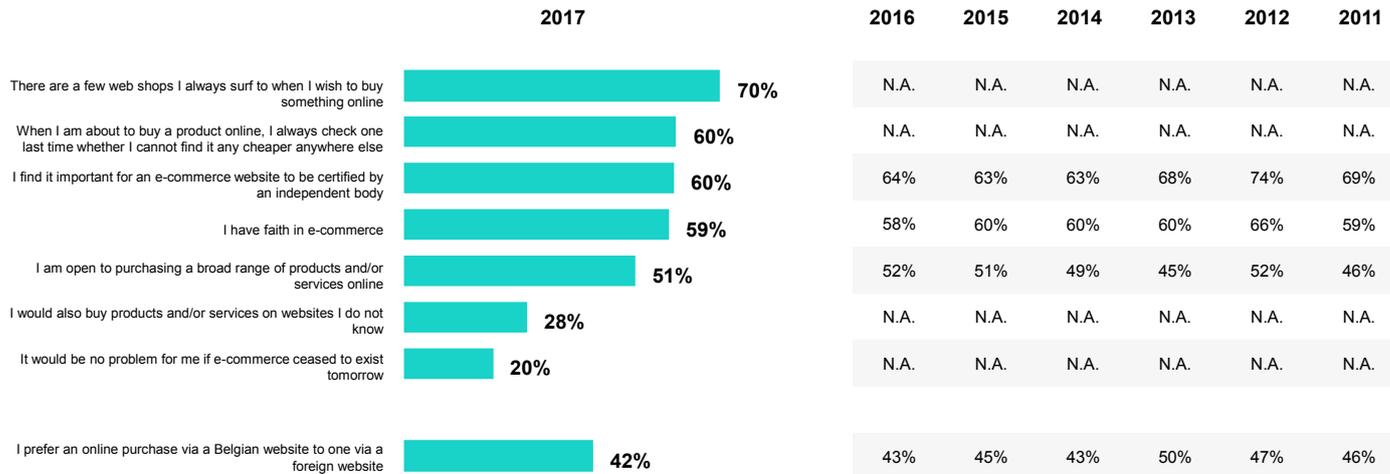
E-commerce trust

Statements

Online customer is loyal

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

% top 2 (agree/strongly agree)



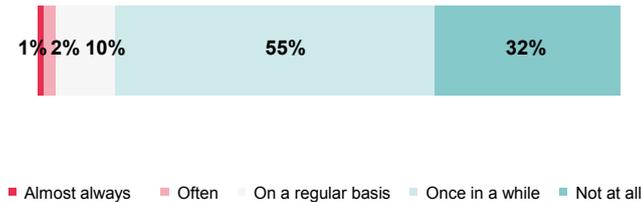
Return

Frequency of returning products

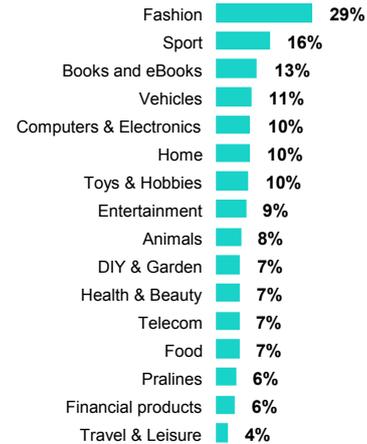
Q: How often do you send back products which you bought via the Internet? | Below we have listed the products you have bought in the past 12 months. Of which of these did you send back at least 1 product?

7 out of 10 customers return products

Frequency



Type of product sent back

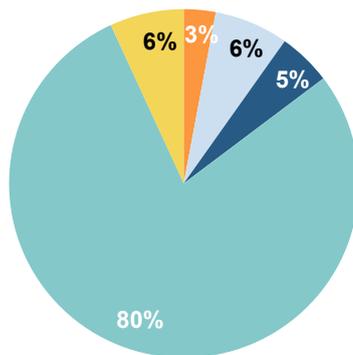


Return

Main reasons of return

Q: What are your main reasons for returning a product?

5 out of 100 never intended to buy



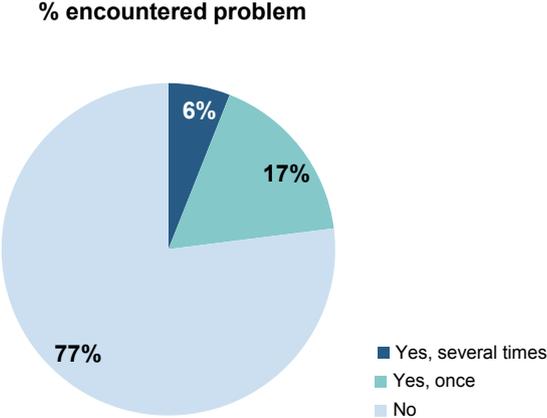
- I bought the product elsewhere after all
- I ordered several products, but intended to only keep one
- I wanted to see the product, but had no intention to buy it
- The product did not answer my wishes
- Other reason

Online shopping problems

Exposure

Q: Did you encounter any issues at your purchase of new products or services on the internet, in the past 12 months?

Great majority of purchases run smoothly

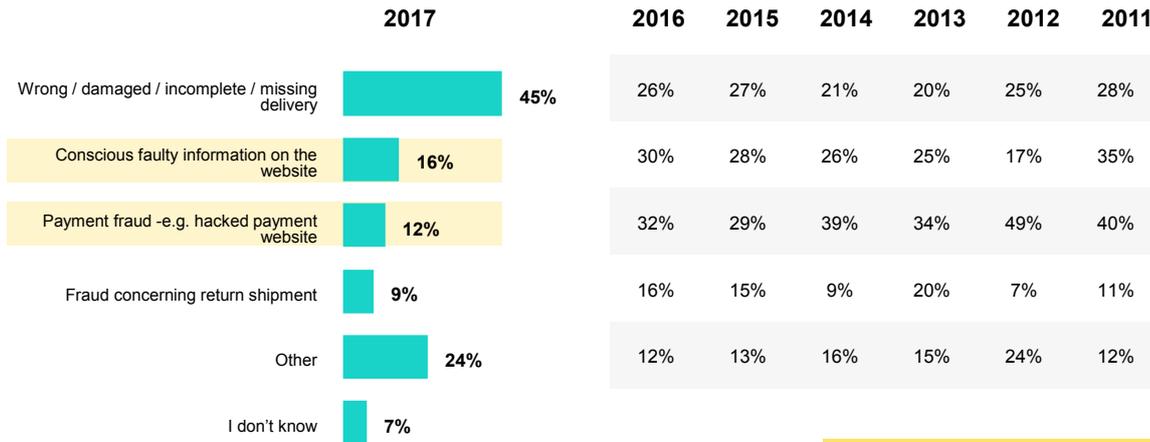


Online shopping problems

Type of problems

Q: Which problems did you encounter?

Online shopper better informed



Remark: this year's list of subcategories has been broadened. See addendum.

23%

**goes shopping to get inspiration
& then buys online**

TRENDS & ATTITUDES



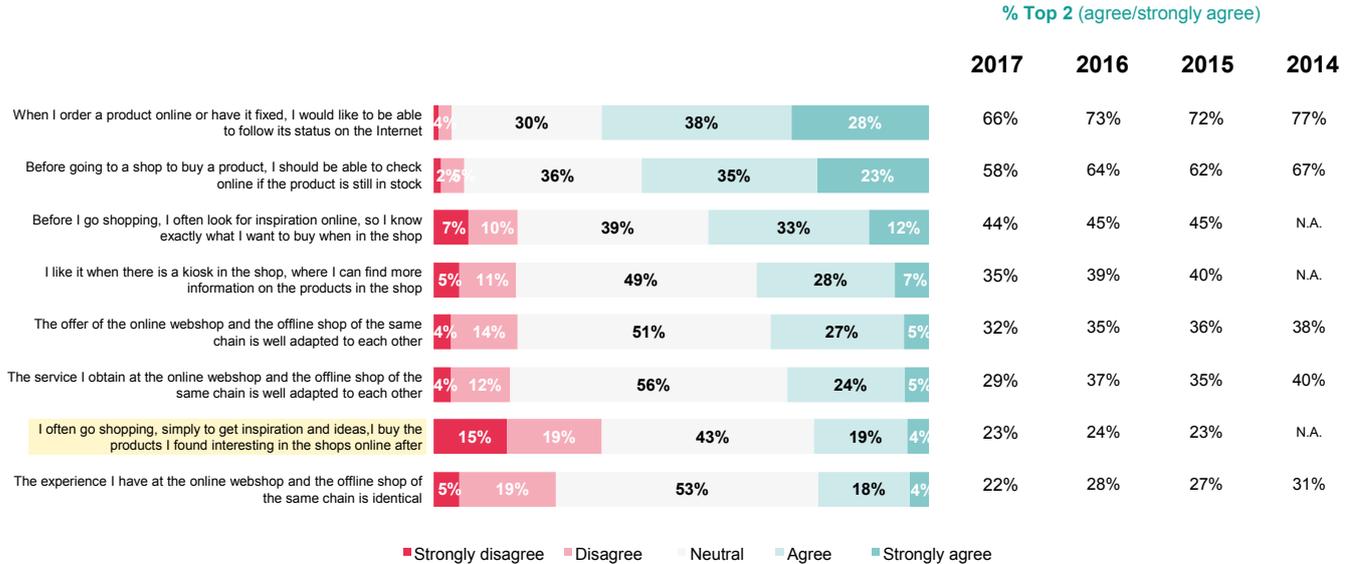
TRENDS

E-commerce trends & attitude

Evolution

1 out of 4 does "showrooming"

Q: To what extent do you agree with the following statements about the online website and the offline shop of the same chain?

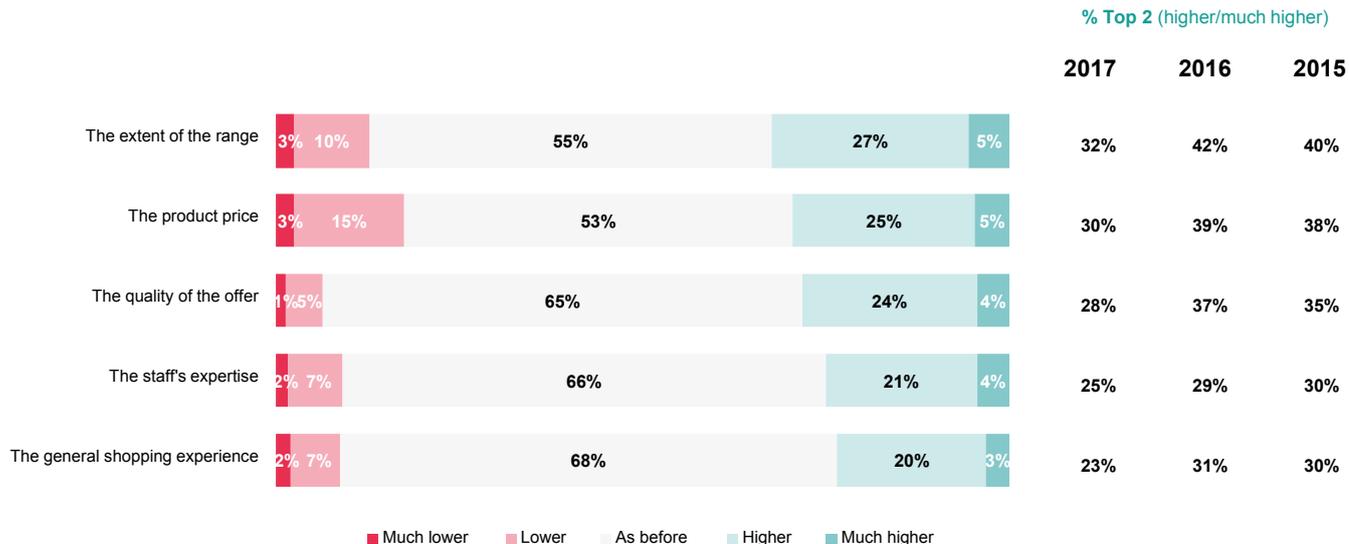


E-commerce trends & attitude

Evolution

Q: Complete this statement: because of the launch of online web shops, my expectations as to ... in the offline shop are now...

Biggest side-effect of omnichannel : higher expectations in terms of extended product range



ADDENDUM

List of categories (1)

Books & eBooks

- Books
- eBooks

Entertainment

- Music on external carrier -e.g. CD, DVD, Blu-ray, etc.
- Digital music -e.g. mp3, etc.
- Music via online streaming services -e.g. Spotify, etc.
- Video -e.g. film, series, etc. on external carrier -e.g. CD, DVD, Blu-ray, etc.
- Digital video -e.g. film, series, etc.
- Video -e.g. film, series, etc. via online streaming services -e.g. Netflix, Stievie, etc.
- Games on external carrier -e.g. games for console, computer, etc.
- Digital games -e.g. paying games on smartphone, etc.
- Games via online streaming services
- Game consoles and accessories

Computers & Electronics

- Computer / laptop
- Computer hardware -e.g. printer, external hard drive, etc.
- Computer software
- Television
- Photo cameras and video recorders
- Household appliances -e.g. iron, Hoover, microwave oven, etc.
- Electronics for personal car -e.g. electric toothbrush, razor, etc.
- Tablet
- Smartphone
- Tablet or smartphone accessories -e.g. charger, cover, etc.
- Other 'smart devices' -e.g. activity tracker, smart watch, e-reader, etc.

Telecom

- Telecom services -e.g. internet connection, prepaid card, etc.

Fashion

- Clothing
- Shoes
- Jewelry
- Leathers and bags -e.g. handbag, suitcase, sports bag, etc.
- Other fashion accessories -e.g. watches, sunglasses, belts, scarves, etc.

Toys & Hobbies

- Toys -inside and outside
- Dress-up clothes and party articles -e.g. carnival
- Hobby materials -e.g. painting, etc.
- Office supplier -e.g. paper, office material, etc.

Home

- Large pieces of furniture -e.g. sofa, bed, etc.
- Small pieces of furniture -e.g. side table, small cupboard, etc.
- Home decoration -e.g. candles, textiles, etc.
- Cooking material -e.g. pots, pans, etc.

List of categories (2)

DIY & Garden

- Tools -e.g. sawing machine, hammer, etc.
- Other DIY materials -e.g. wood, electrical cables, etc.
- Garden decoration -e.g. garden furniture, decoration articles, etc.
- Garden maintenance -e.g. lawn mower, maintenance products, etc.
- Flowers, plants, etc.

Food

- General food -supermarket
- Prepared food -e.g. takeaway, catering, etc.
- Meal packs, delivered in box -unprepared

Pralines

- Chocolates

Health & Beauty

- Personal care products -e.g. hair products, creams, etc.
- Make-up and perfume
- Health products -e.g. food supplements, lenses, etc.
- Pharmaceutical products -not on prescription

Sport

- Sports clothing
- Sports shoes
- Sports accessories -e.g. halters, swimming floaters, etc.
- Sports Electronics

Animals

- Food products
- Toys and accessories

Travel & Leisure

- Travel tickets -e.g. airplane, boat, train, bus, etc.
- Taxi and other transport services -e.g. taxi, car sharing, etc.
- Hotel/ overnigher bookings
- Restaurant bookings
- Tickets to events -e.g. festival, concerts, etc.
- Tickets to leisure time centers -e.g. cinema, fun fair, museum, etc.

Vehicles

- Car
- Motorbike
- Bicycle

Financial Products

- Bank products -e.g. current account, savings account, investment product...
- Travel assistance or cancellation insurance
- Other insurances -e.g. fire, vehicle, life, pension scheme...

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