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InSites Consulting
taking research forward

E-commerce in Belgium

June 5th, 2012

Introduction

To me, the concept of 'online commerce' is becoming a pleonasm. Because trading is done through all channels available – including websites. The boundaries between the classic 'bricks' and the new 'clicks' are disappearing at a stunning pace. Online companies open physical stores, while those who have been selling in brick & mortar-stores, are further exploiting the new channels of e-commerce.

Our second e-commerce survey, still the most comprehensive in its kind, shows that online commerce has reached a certain level of maturity. Some sectors still have tremendous growth potential within the existing online population, while others need to focus on attracting potential customers in the 'offline' world.

These are exciting times for everybody in our trade. I hope this survey will give you an idea of what the future will bring.

Dominique Michel,
Ceo Comeos

Table of content

Download the full survey on www.comeos.be

Colophon

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Objectives & methodology

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Objectives & methodology

Background

Comeos represents **Belgian businesses and services.** Our members are active in 18 sectors and sell either to companies or directly to consumers. Together they account for 11.2 % of the GNP and employ 400,000 people, making them the biggest employer in the private sector. Comeos provides custom services for its members and wants to encourage dynamic businesses as a knowledge and networking platform.

Marketing objectives

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

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: april 2nd 2012 - april 15th 2012
Scope: Belgium

Sample

N = 1058

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 average (95%)

Comparisons with Comeos ‘E-commerce in België 2011’

Same period of field (April 2011) and sample composition to optimize comparability

Objectives & methodology

Used logo's for sectors

comeos
electro

comeos
telecom

comeos
sports

comeos
books

comeos
interior

comeos
for commerce and services

comeos
DIY & garden

comeos
fashion

comeos
toys

comeos
health & beauty

comeos
entertainment

comeos
food

E-commerce experience

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46% of the Belgian internet population has made an online purchase in the past year

General trust in the security of e-commerce has risen (from 64% in 2011 to **70%** in 2012)

E-commerce experience

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).

	EVER PURCHASED ONLINE		PURCHASED ONLINE LAST YEAR	
	2012	2011	2012	2011
ONLINE POPULATION	67%	66%	59%	58%
BELGIAN POPULATION*	52%	52%	46%	45%

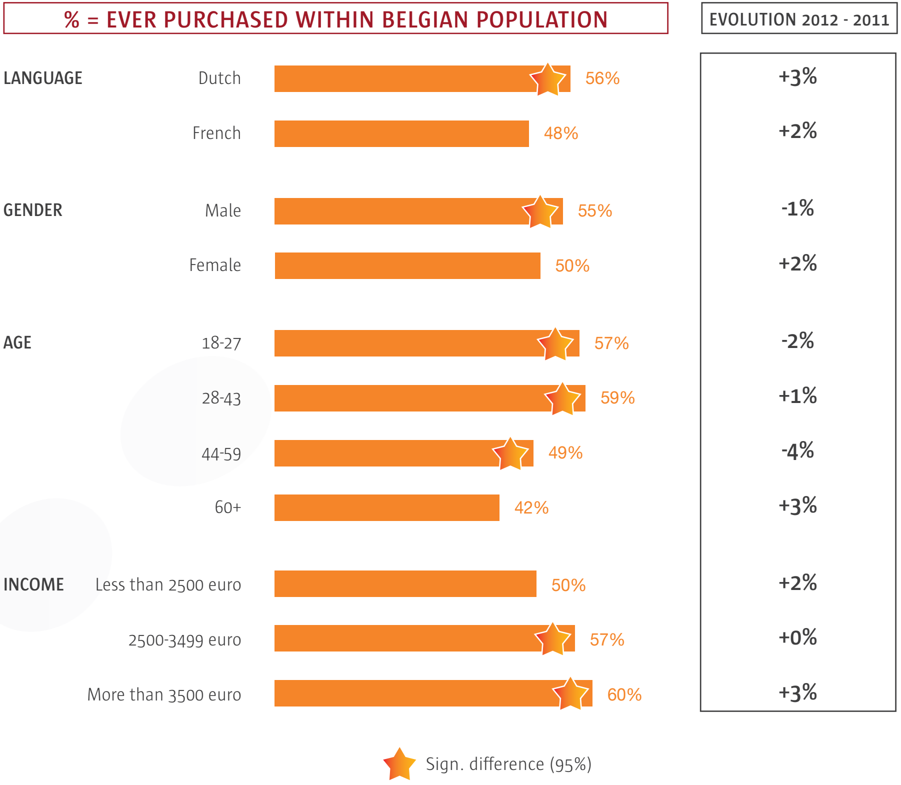
* Extrapolated to the Belgian population regarding the current internet-population (78%)

N = 2223 / F = None

E-commerce experience

Penetration (profile)

Q: Have you ever bought new products or services via the Internet (for personal purposes)?



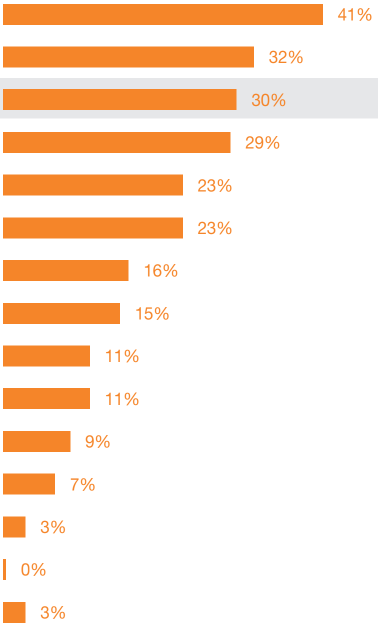
For younger, Dutch-speaking people within the higher income-rank, online shopping is more popular.

N = 2223 / F = None

E-commerce experience

Barriers

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



BARRIERS FOR ONLINE PURCHASES OF PRODUCTS/SERVICES		DATA 2011	EVOLUTION 2012 - 2011
Because I want to see it/try it before deciding to buy	41%	37%	+4%
Because I don't like to give my personal data on the Internet	32%	31%	+1%
Because I have serious doubts concerning the security level	30%	36%	-6%
Because I don't have or don't want to use a credit card	29%	27%	+2%
Because I want to talk to a shop assistant/dealer	23%	22%	+1%
Because I have access to all the products/services in physical shops	23%	23%	0%
Because I have to be home when the products are delivered	16%	16%	0%
Because I want to see if items are in stock in a physical shop	15%	15%	0%
Because I don't have sufficient Internet experience yet	11%	8%	+3%
Because I have a wider selection of products/services in the real world	11%	15%	-4%
Because there is more product information available in the real world	9%	7%	2%
Because prices aren't lower on the Internet	7%	7%	0%
Because I have experienced too many failed attempts	3%	5%	-2%
Because I don't have a computer at home	0%	2%	-2%
Other reason	3%	4%	-1%

N = 656 / F = Only if never purchased online before

Current online shopping behaviour

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1 in 5 online buyers did his/her **first online purchase in the past year.**

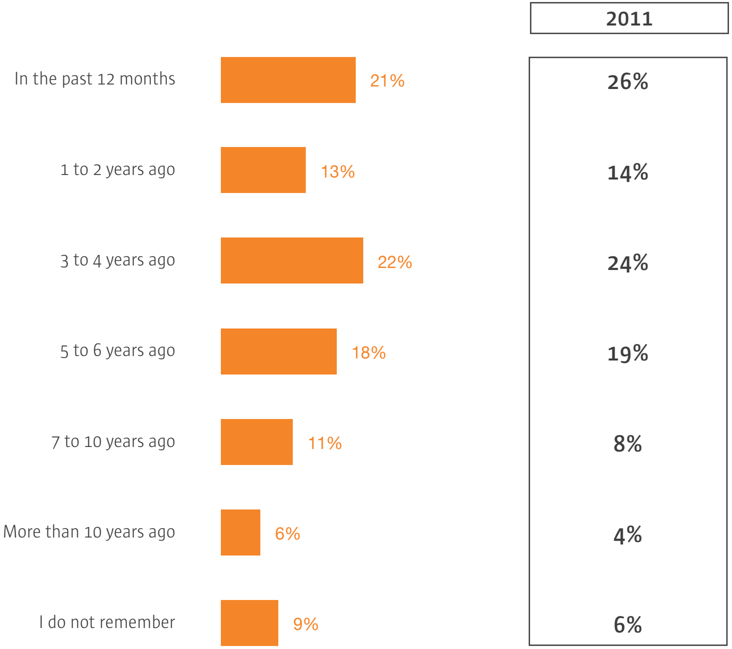
Younger people, women and people with lower income levels have also found their way to e-commerce in the past two years.

Last year, e-commerce was mostly related to new purchases. This year we see an **equal spread between new and replacement purchases.**

Current online shopping behaviour

Experience

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



As 1 in 5 online buyers did his/her first online purchase in the past 12 months, there is a high inflow of new online buyers.

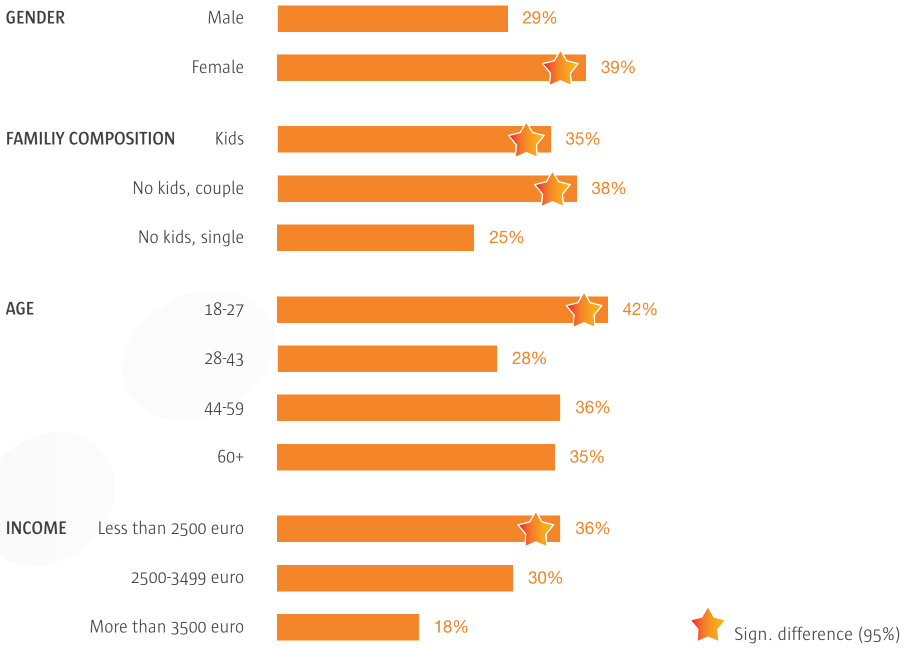
N = 1058 / F = None

Current online shopping behaviour

Experience (profile)

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

% = FIRST ONLINE PURCHASE IN LAST TWO YEARS



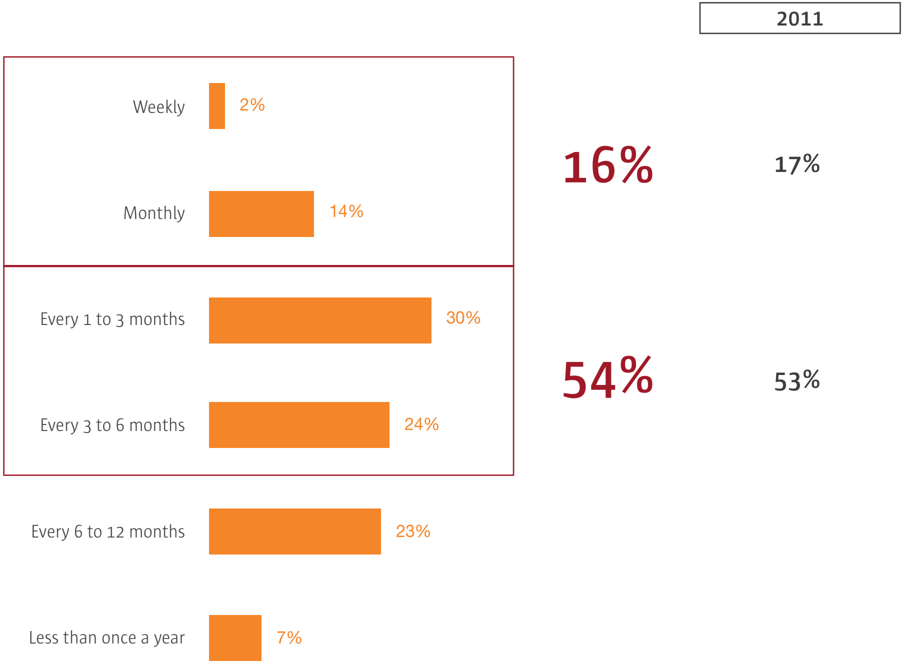
Younger people, women, and people with a lower income have had a first e-commerce expercience in the last two years more often than the other groups

N = 1058 / F = None

Current online shopping behaviour

Frequence

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



1 in 6 online buyers buys online every month

Half of them buys online every 3 to 6 months

N = 1058 / F = None

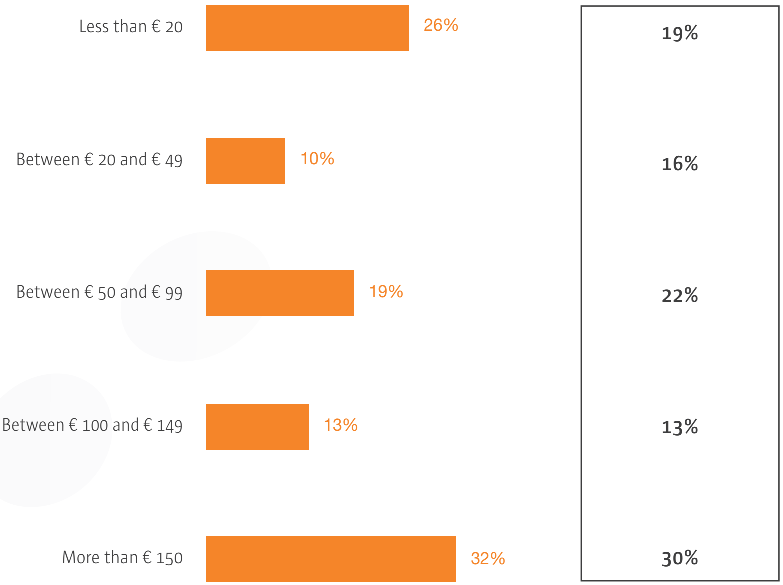
Current online shopping behaviour

Monthly budget

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

Average = € 163 / month
(€ 1.944 / year)

2011: Average € 130 / month
(€ 1.560 / year)



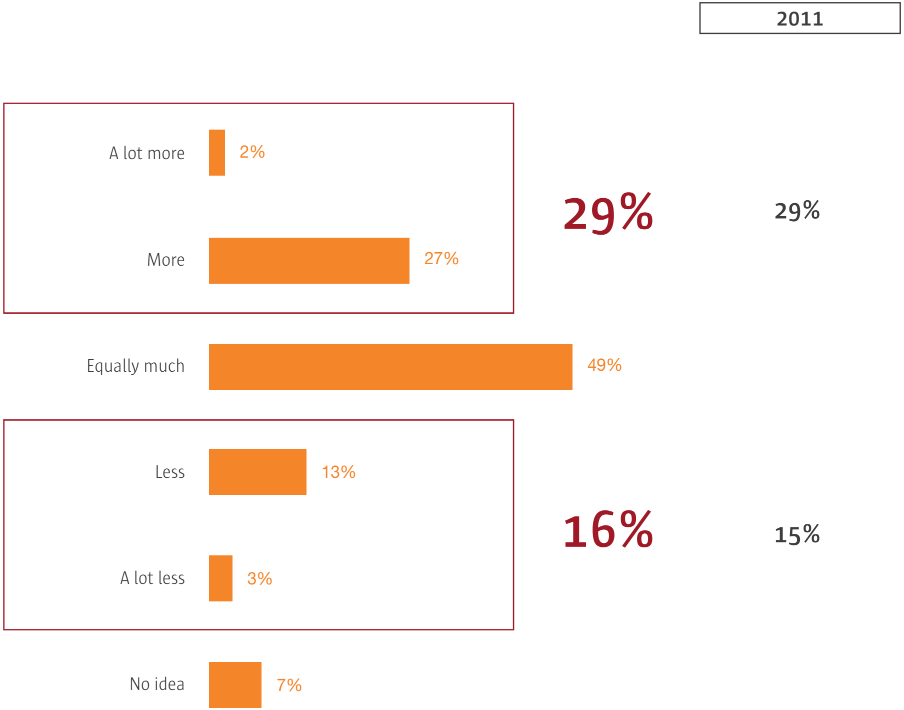
1 in 3 bought online for more than € 150 last month

N = 1058 / F = None

Current online shopping behaviour

Evolution budget

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



E-commerce in Belgium is obviously expanding

3 out of 10 online buyers already spend more than 1 year ago

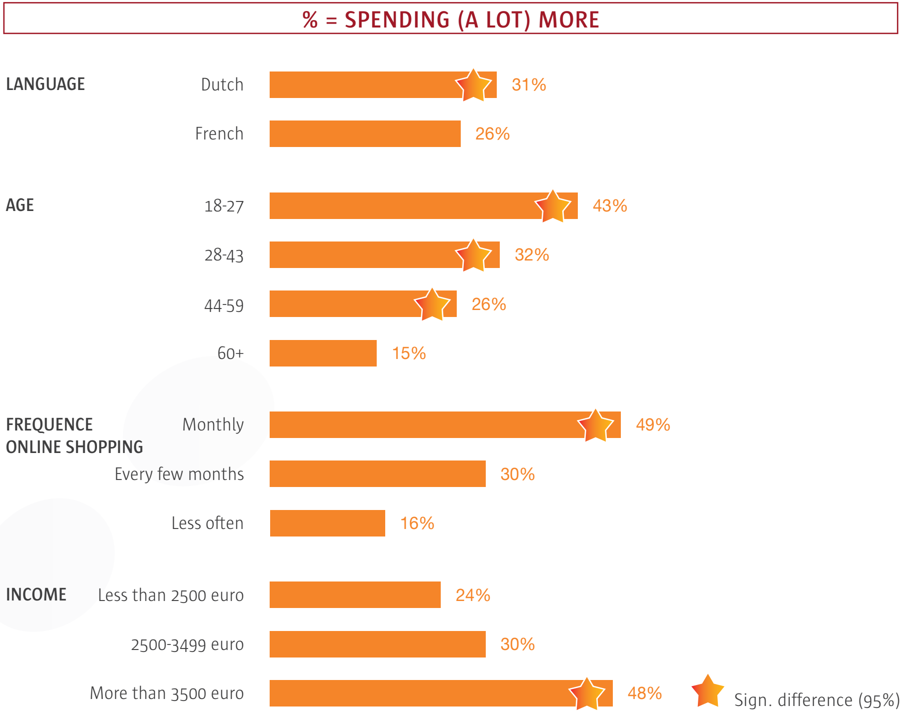
This evolution was already going on last year and is not in- or decreasing

N = 1058 / F = None

Current online shopping behaviour

Evolution budget (profile)

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



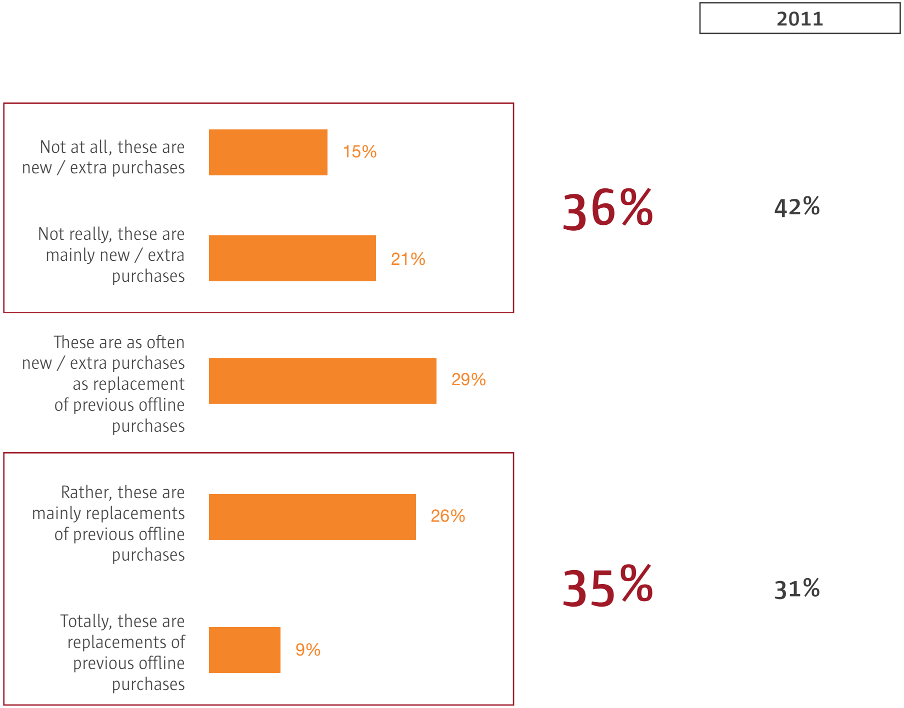
People who are strongly represented amongst online buyers are also the ones who spend more than one year ago

N = 1058 / F = None

Current online shopping behaviour

Substitution offline purchases

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



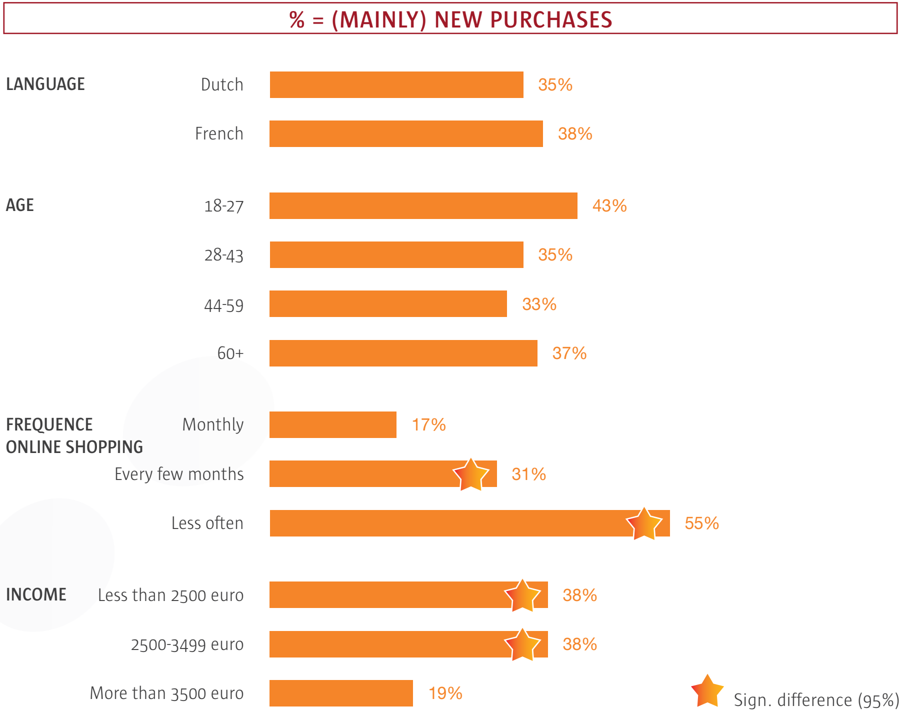
While e-commerce purchases were mainly new purchases last year, we now see an equal spread between new and replacement purchases

N = 1058 / F = None

Current online shopping behaviour

Substitution offline purchases (profile)

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



Especially for people with lower and intermediate incomes and people who shop online less often than monthly, online purchases are new purchases

N = 1058 / F = None

Online purchases

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An online buyer is loyal: 89% will buy online again in the future (in 2011 this was 84%)

1 in 5 online buyers looks for information offline

Online information is still the most important source of information though

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?

		2011
Hotel / Overnight stay	42%	35%
Clothing / shoes	40%	38%
Event tickets	38%	34%
Boat, plane or train tickets	34%	31%
Books	33%	30%
Computer, hardware and software	27%	24%
CD / DVD / Blu-ray / Games	23%	23%
Electronic appliances	21%	18%
Digital music	16%	13%
Telecom	16%	16%
Personal care products	16%	16%
Household appliances	14%	12%
Toys	12%	12%
Furniture and home decoration	8%	7%
Nutrition (supermarket)	8%	7%
Fun fair tickets	8%	10%
DIY and garden products	6%	6%
Pharmaceutical products	6%	6%
Sports products	6%	7%
Digital films / series	5%	6%
Resto / catering	3%	2%
Cars, motorbikes, bicycles	2%	2%
Other	17%	16%

Top 5 consists of Hotels/fashion, Event / transport tickets and books.

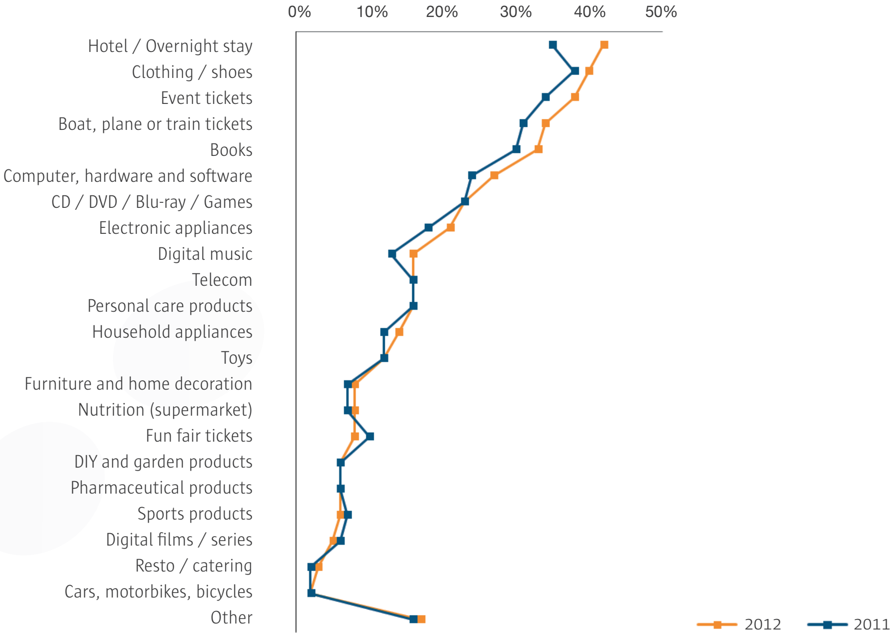
The products in this top 5 are the same as last year. They have all increased in importance

N = 1058 / F = None

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?



The majority of produts is bought online more often than in 2011

For fun fair tickets, sports products and digital films/series, we see a small decrease.

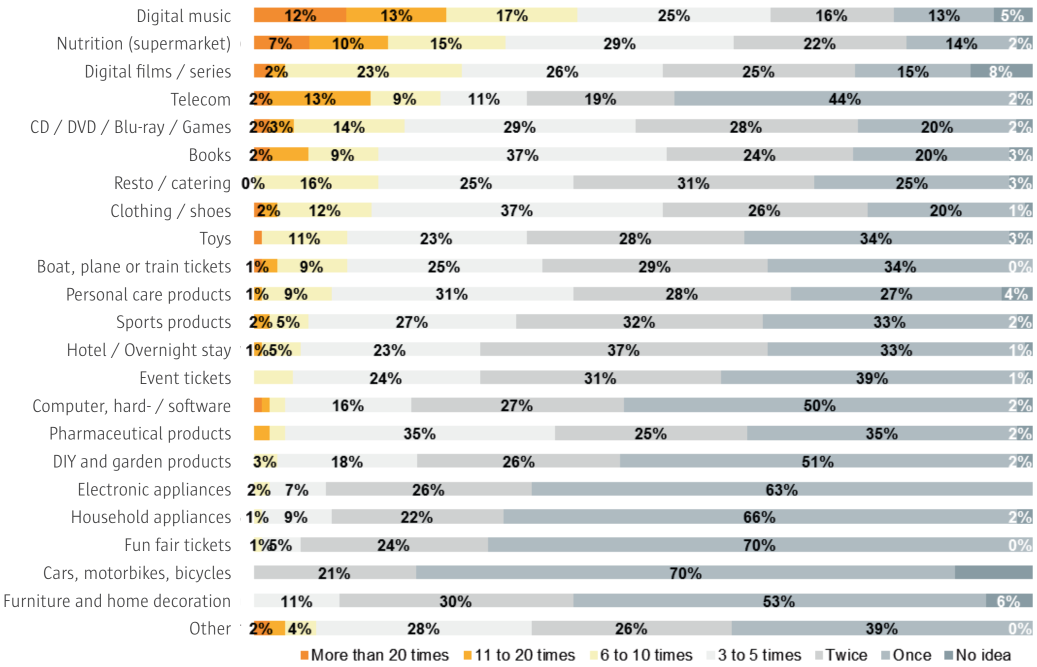
N = 1058 / F = None

Online purchases

Frequence 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

Digital music, nutrition and Digital films/ series are bought most frequently



BOUGHT ONLINE MORE THAN 5 TIMES IN THE PAST YEAR

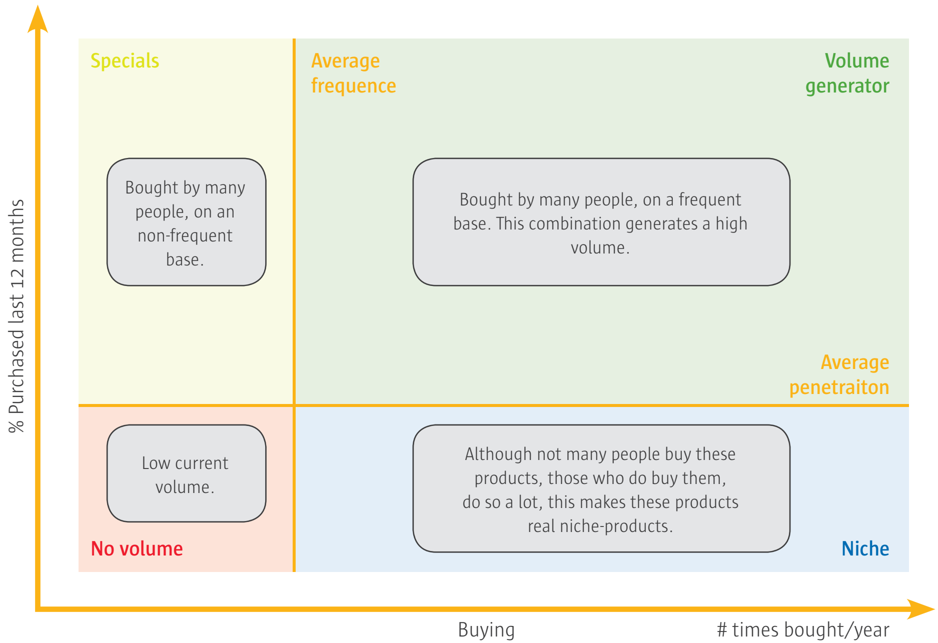
	Data 2012	Data 2011
Digital music	42%	38%
Nutrition (supermarket)	32%	45%
Digital films / series	27%	45%
Telecom	24%	18%
CD / DVD / Blu-ray / Games	19%	21%
Books	16%	14%
Resto / catering	16%	26%
Clothing / shoes	15%	20%
Toys	12%	10%
Boat, plane or train tickets	12%	13%
Personal care products	10%	10%
Sports products	7%	13%
Hotel / Overnight stay	6%	8%
Event tickets	5%	5%
Computer, hard- / software	4%	6%
Pharmaceutical products	4%	6%
DIY and garden products	3%	2%
Electronic appliances	2%	3%
Household appliances	1%	3%
Fun fair tickets	1%	2%
Cars, motorbikes, bicycles	0%	1%
Furniture and home decoration	0%	1%
Other	8%	12%

N = min 35 (N cars/motorcycles = 20) F = Indien gekocht

Online purchases - Current purchase of new products (Quadrant methodology)

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



Specials

Bought by many people, on an non-frequent base.

Average frequence

Volume generator

Bought by many people, on a frequent base. This combination generates a high volume.

Average penetraiton

Low current volume.

No volume

Although not many people buy these products, those who do buy them, do so a lot, this makes these products real niche-products.

Niche

% Purchased last 12 months

Buying

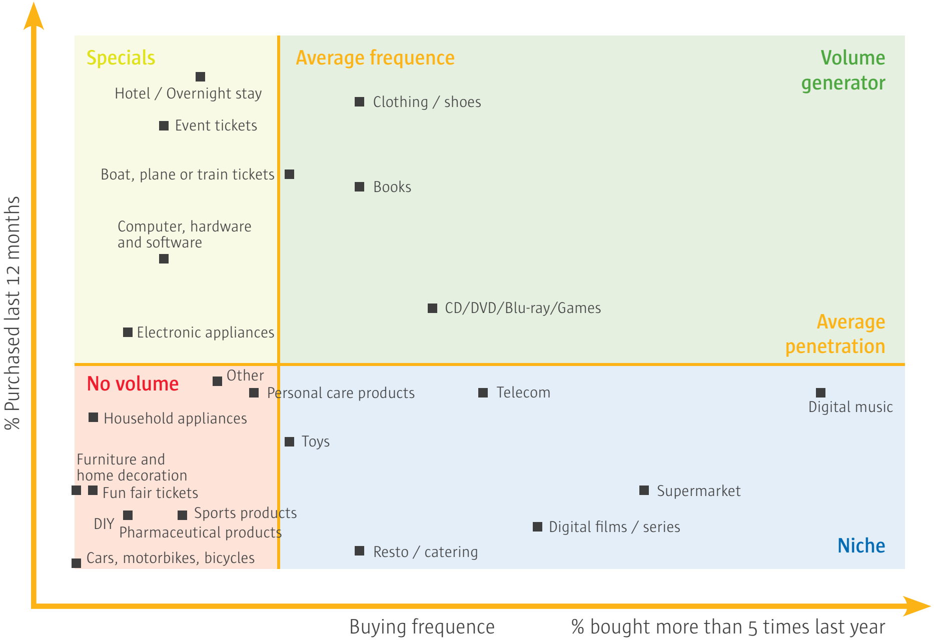
times bought/year

N = 1058 / F = None

Online purchases

Current purchase of new products (Quadrant) 2012

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



Clothing /shoes, books and CD/DVD/ Blu-ray are real volume generators, while Telecom, Digital music and Supermarket food are more niche markets

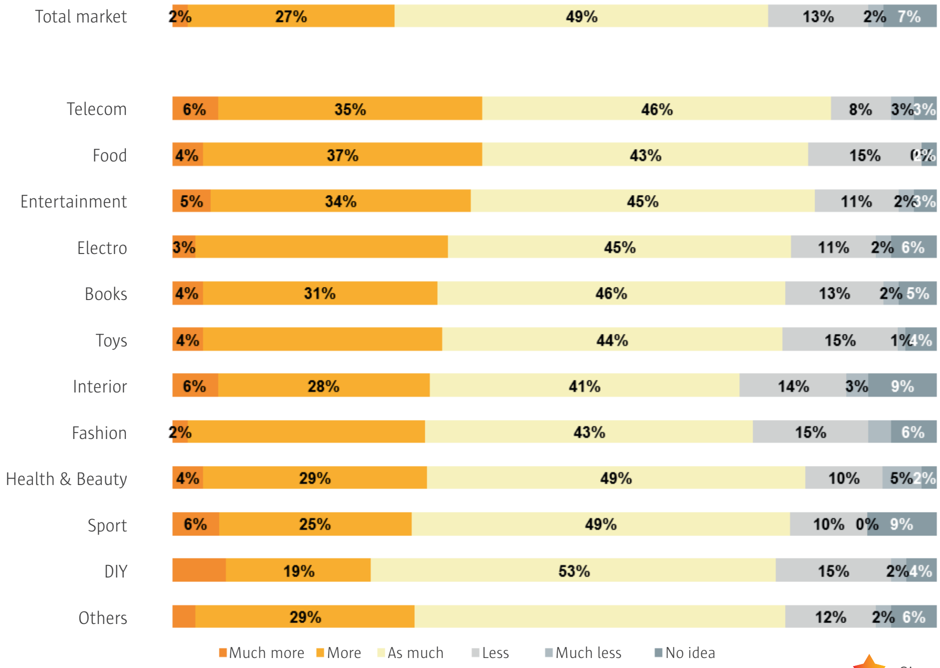
N = 1058 / F = None

Online purchases

Future intention to buy

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

The number of people who want to buy (much) more online has, compared to 2011 and thoughout all sectors, increased by 10%. For some sectors, such as **Telecom, Electro, Interior and Fashion,** we notice a doubling compared to last year.



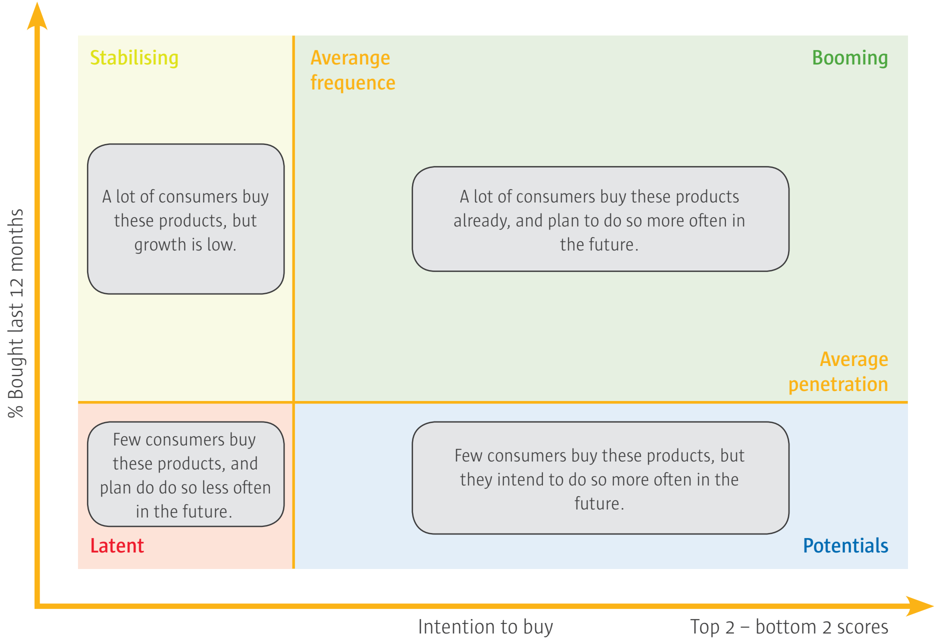
	Top 2 score 2012	Top 2 score 2011
Total market	29%	19%
Telecom	41%	15%
Food	41%	33%
Entertainment	39%	21%
Electro	36%	18%
Books	35%	19%
Toys	35%	Not measured
Interior	34%	12%
Fashion	33%	16%
Health & Beauty	33%	12%
Sport	31%	18%
DIY	26%	10%
Others	32%	24%

★ Sign. higher than min. 1 other group (95%)

Online purchases

Future purchase new products (Quadrant methodology)

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?



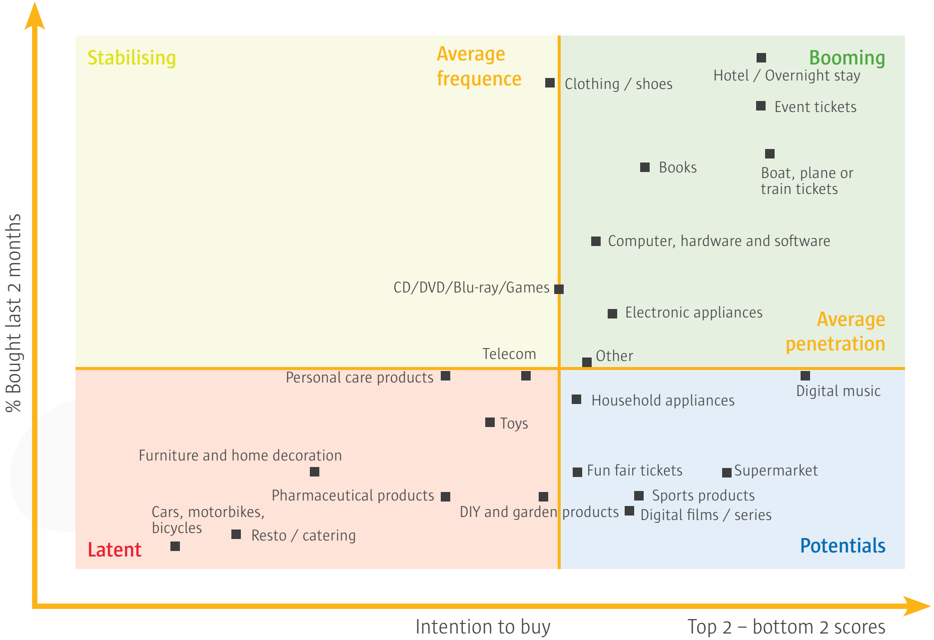
N = 1058 / F = None

Online purchases

Future purchase of new products (Quadrant) 2012

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?

Tickets, hotel and books and electronics are already bought on a regular base and are expected to be bought even more in the future. On the other hand, digital music/films/series, sports products and household appliances are not that popular yet, but are expected to be bought more in the future, making them high potentials.

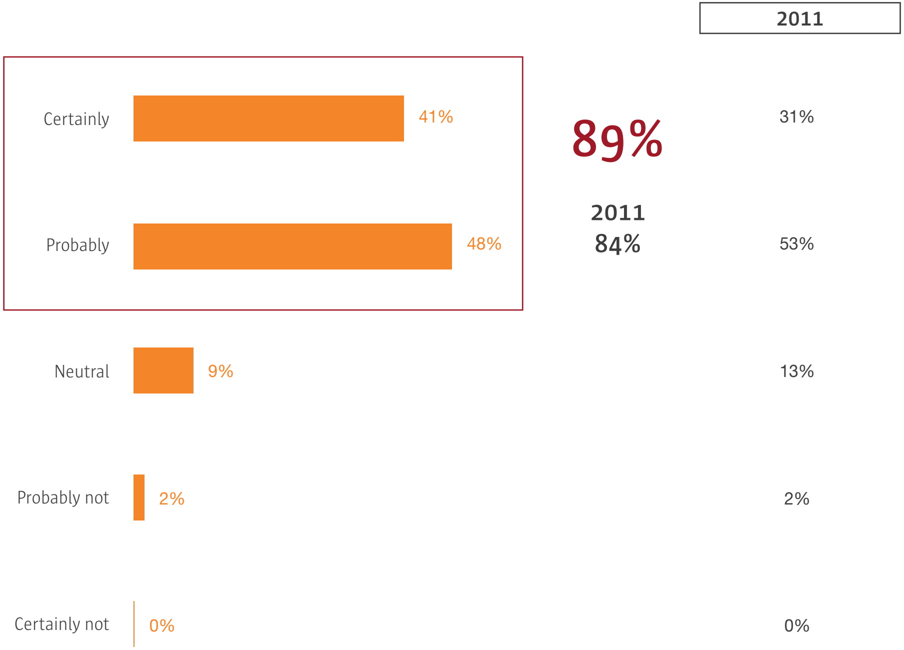


N = 1058 / F = None

Online purchases

Future intention to buy

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



An online buyer stays an online buyer

The intention to buy online again is very strong and has increased compared to 1 year ago

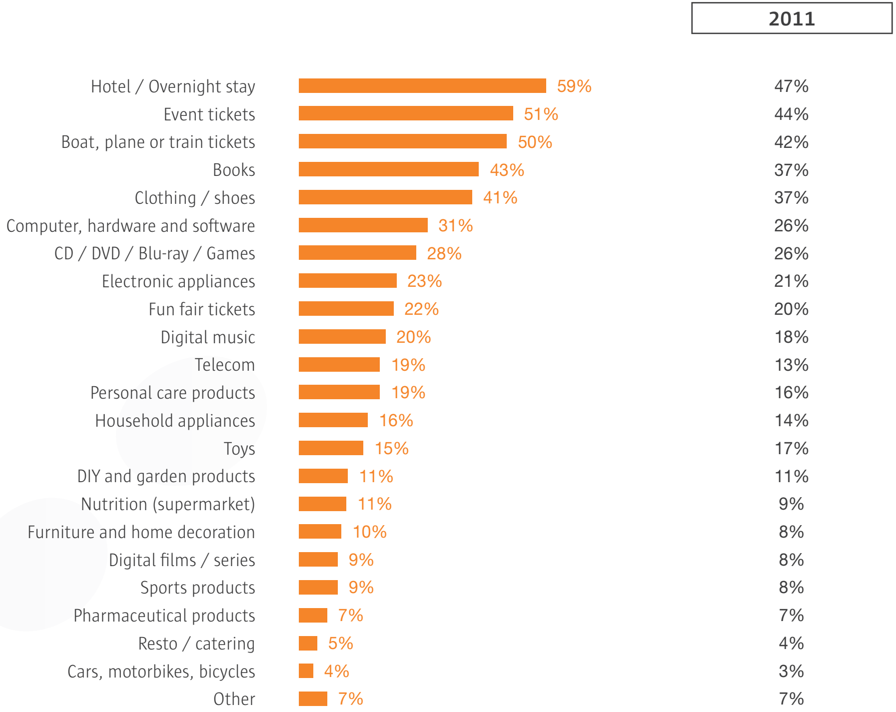
98 % of online consumers expects to keep buying online in the future

N = 1058 / 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?



		2011
Hotel / Overnight stay	59%	47%
Event tickets	51%	44%
Boat, plane or train tickets	50%	42%
Books	43%	37%
Clothing / shoes	41%	37%
Computer, hardware and software	31%	26%
CD / DVD / Blu-ray / Games	28%	26%
Electronic appliances	23%	21%
Fun fair tickets	22%	20%
Digital music	20%	18%
Telecom	19%	13%
Personal care products	19%	16%
Household appliances	16%	14%
Toys	15%	17%
DIY and garden products	11%	11%
Nutrition (supermarket)	11%	9%
Furniture and home decoration	10%	8%
Digital films / series	9%	8%
Sports products	9%	8%
Pharmaceutical products	7%	7%
Resto / catering	5%	4%
Cars, motorbikes, bicycles	4%	3%
Other	7%	7%

Top 5 consists of the same products as last year.

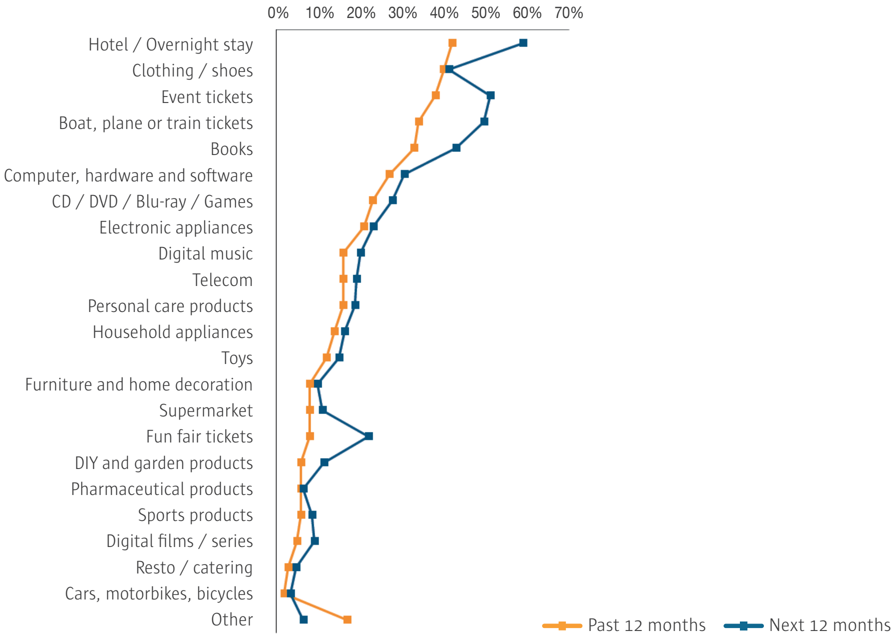
The intention to buy is higher for all of the top 5 products/ services, as it is for most products/ sercices

N = 945 / F = Only if intention to buy online in the future

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?



Strongest risers in the coming 12 months will be hotels, books, transport / fun fair- and eventtickets.

The intention to buy in the coming 12 months is higher than the purchases made in the past 12 months.

N = 1058 / F = None

Online purchases

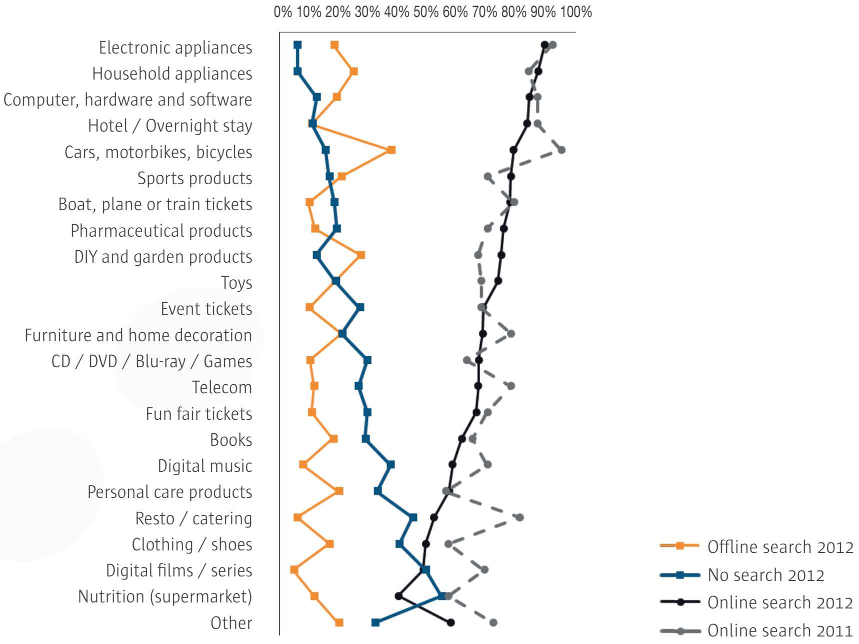
Looking for information

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

1 in 5 online buyers keeps on looking for information offline (especially for vehicles, DIY and furniture/ household products).

The most important source of information is online. For Vehicles, Resto/catering, Telecom and Decoration, this source has gained in importance

LOOKING FOR INFORMATION ONLINE



Sector focus

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The main driver for e-commerce is the time saving aspect, which is prominent for online purchases in the food sector.

Websites in the toys sector have the highest scores on satisfaction, whereas telecom and sport websites score the lowest on likeability.

2 out of 5 online shoppers prefer home delivery, the minority is willing to pay for flexible delivery timings.

Sector focus

Drivers for E-commerce (Conclusions)

The main driver for e-commerce is the time saving aspect. More than 2 out of 5 online-shoppers consider this as one of the top three reasons for purchasing products online.

comeos electro

The online purchase of electro is less driven by the time saving aspect, but mainly by the **lower price** and the possibility to **compare and read reviews on different products.**

comeos fashion

Saving time is less present as a reason for buying fashion items online. **The availability of coupons and reductions** is the biggest driver.

comeos food

The **time saving** aspect is the main reason for buying food products online. Moreover does it allow to **shop 24/7 and avoid crowds.**

comeos books

This online sector is, apart from the time saving aspect, mainly driven by the possibility to have your books **delivered at home.**

comeos health & beauty

Home delivery and the accessibility to special promotions and reductions are the main reasons for buying health and beauty products online.

comeos telecom

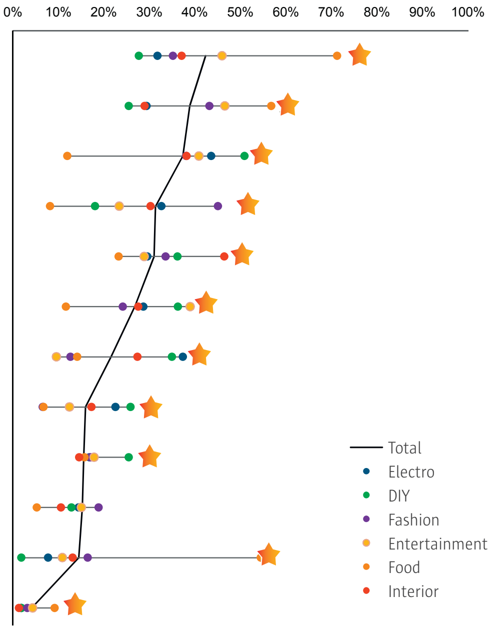
The main reason for purchasing telecom online is, besides **saving time,** driven by the possibility to buy **24/7.**

Sector focus

Drivers for E-commerce (sectordetails 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	2011
Because it saves time	42%	45%
Because I'm able to shop 24 hours a day	39%	37%
Because I can find products and services at lower prices	37%	37%
Because I get access to special discounts, promotions…	31%	29%
Because it gets delivered to my door	31%	34%
Because I have a wider selection of products/services online	27%	23%
Because I can compare and review different products/services	22%	21%
Because there is more product information online	16%	15%
Access to products/services that aren't available in my country	16%	14%
Because I can see whether items are in stock	15%	15%
Because I avoid crowds	14%	16%
Other reasons	4%	4%



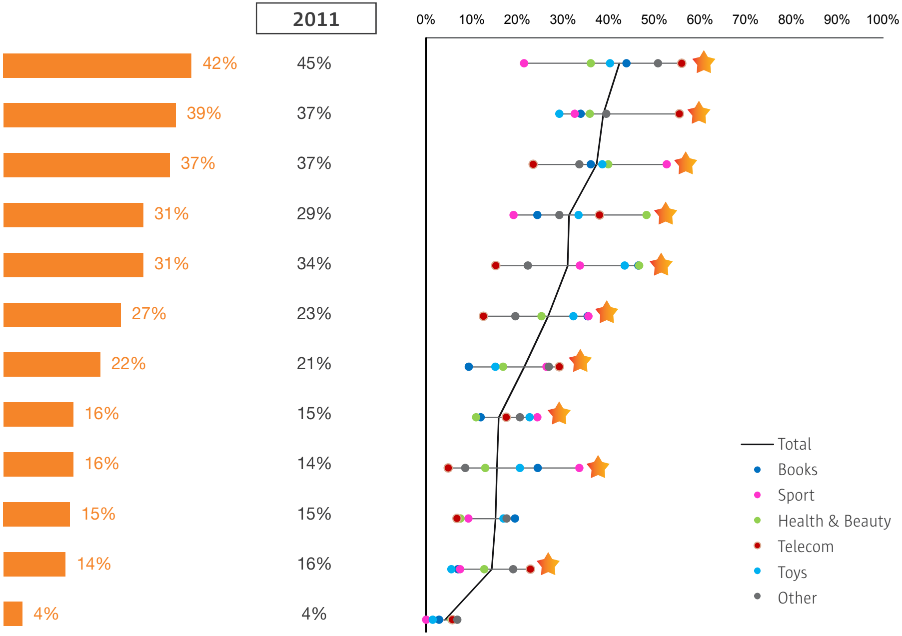
N(Electro) = 396, N(DIY) = 54, N(Fashion) = 377 N(Entertainment) = 317; N(Food) = 76; N(Interior) = 74 / F = Bought product before

★ Sign. higher than min. 1 other sector (95%)

Sector focus

Drivers for E-commerce (sectordetails 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	2011
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Because there is more product information online	16%	15%
Access to products/services that aren't available in my country	16%	14%
Because I can see whether items are in stock	15%	15%
Because I avoid crowds	14%	16%
Other reasons	4%	4%

N(Telecom) = 103, N(Sport) = 71, N(Health & Beauty) = 106; N(Books) = 214; N(Toys) = 71; N(Other) = 555 / F = Bought product before

★ Sign. higher than min. 1 other sector (95%)

Online product purchase

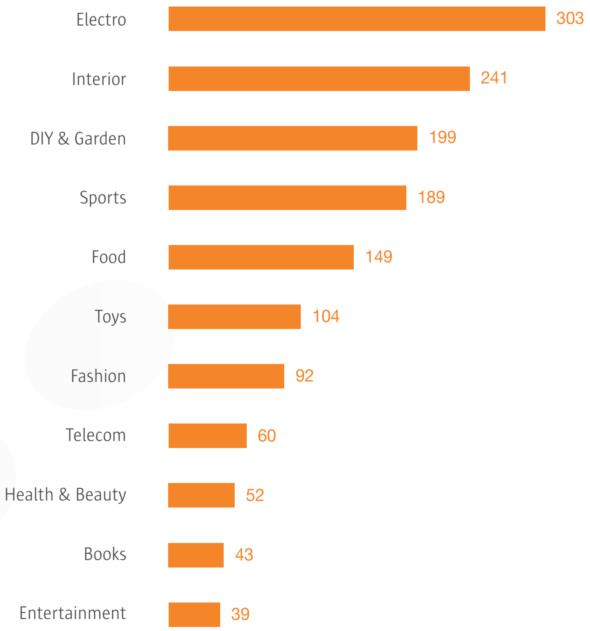
Purchase amount

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

On average online shoppers spend € 187.

The largest amounts are spent in the electro, interior and/or Do-it-yourself sector.

Online shoppers spend the least on books and the entertainment sector.

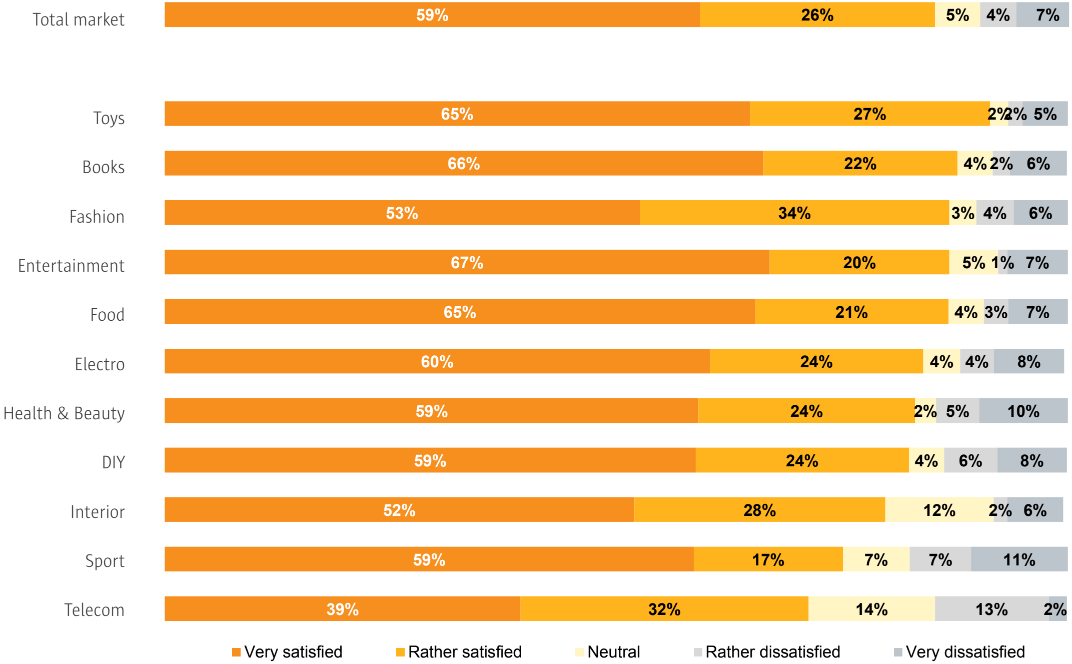


Sector focus

Website satisfaction

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

Overall satisfaction scores for the e-commerce sites are high. Websites within the **toy sector** have the **highest likeability,** more than 9 out of 10 is satisfied with the website. Websites from the Sport or Telecom sector have the lowest satisfaction.



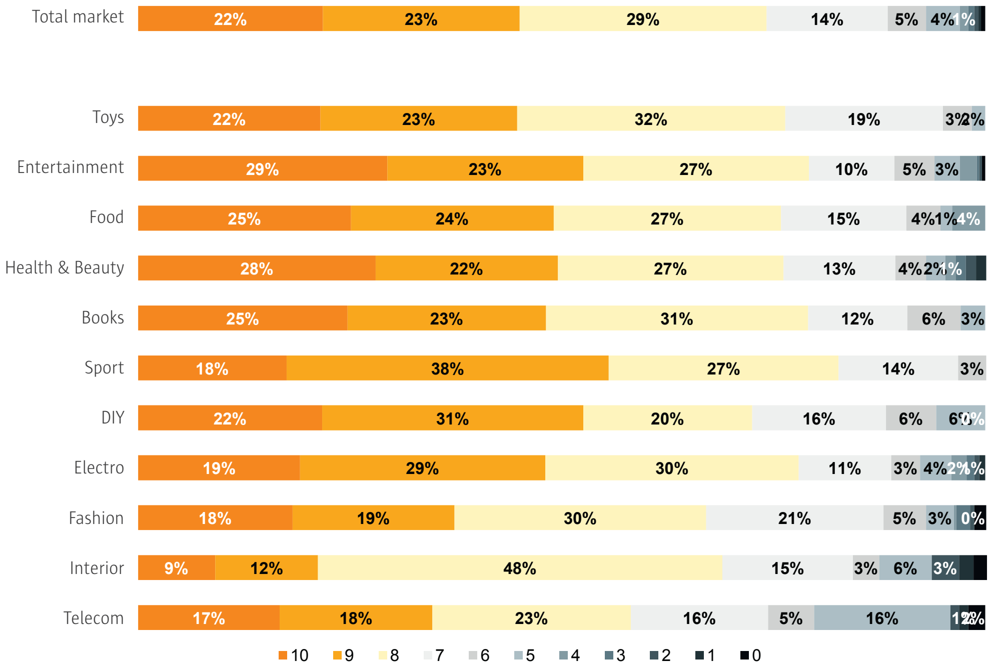
	Top 2 score 2012	Top 2 score 2011
Total market	85%	82%
Toys	91%	Not measured
Books	88%	88%
Fashion	87%	83%
Entertainment	87%	81%
Food	87%	84%
Electro	84%	83%
Health & Beauty	83%	83%
DIY	82%	73%
Interior	80%	78%
Sport	75%	72%
Telecom	71%	72%

Sector focus

Recommend website

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

Toys and Entertainment websites are the most likely to be recommended to friends. Websites within the Interior and Telecom score the lowest on likability for word-of-mouth recommendation.



	Mean score		Net promotor score	
	2012	2011	2012	2011
Total market	8,2	7,9	34%	21%
Toys	8,7	Not measured	40%	Not measured
Entertainment	8,5	8,0	42%	24%
Food	8,5	8,4	40%	41%
Health & Beauty	8,4	8,3	39%	37%
Books	8,4	7,8	39%	24%
Sport	8,4	7,4	52%	2%
DIY	8,3	7,6	41%	9%
Electro	8,2	8,0	37%	25%
Fashion	7,9	7,8	25%	18%
Interior	7,5	7,3	5%	6%
Telecom	7,4	7,5	9%	3%

Sector focus

Drivers website (conclusions)

Price is the main reason why a specific website is chosen for purchasing a product or service.

comeos electro

Price plays an important role in the choice of electro e-commerce websites.

comeos DIY & garden

Do-it-yourself websites are less driven by price compared to other sectors. The **'coincidence factor'** is the reason why shoppers purchase on a specific website.

comeos fashion

Price and **positive previous experience** are the main reasons for choosing a fashion website for online purchases.

comeos food

Price has no impact on the choice of food e-commerce websites. **Previous experience and fast delivery** are rather important choice drivers.

comeos interior

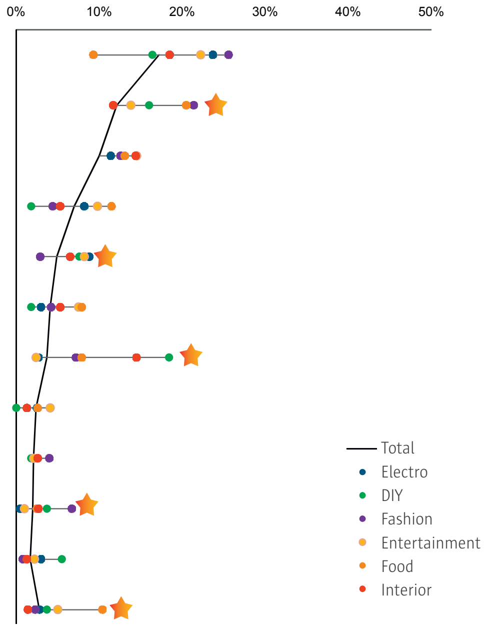
Price is less a decision maker when buying furniture and interior products online. These websites are mainly driven by **product selection / availability and coincidence.**

Sector focus

Drivers website (sector details 1/2)

Q: Why did you use ‘website’ for your online purchase?

PERCEIVED AS MOST IMPORTANT	% CONSUMERS WHO INDICATE THIS AS MOST IMPORTANT DRIVER	2011
Price	17%	31%
Satisfied with previous experience	12%	12%
Product selection and availability	10%	13%
Fast delivery	7%	10%
Trust and safety	5%	8%
Userfriendliness	4%	6%
By accident – where I found the product	4%	6%
Low shipping costs	2%	3%
Recommended by a friend	2%	3%
Return, guarantee policy	2%	3%
Complete product information	2%	2%
Other reason	3%	4%



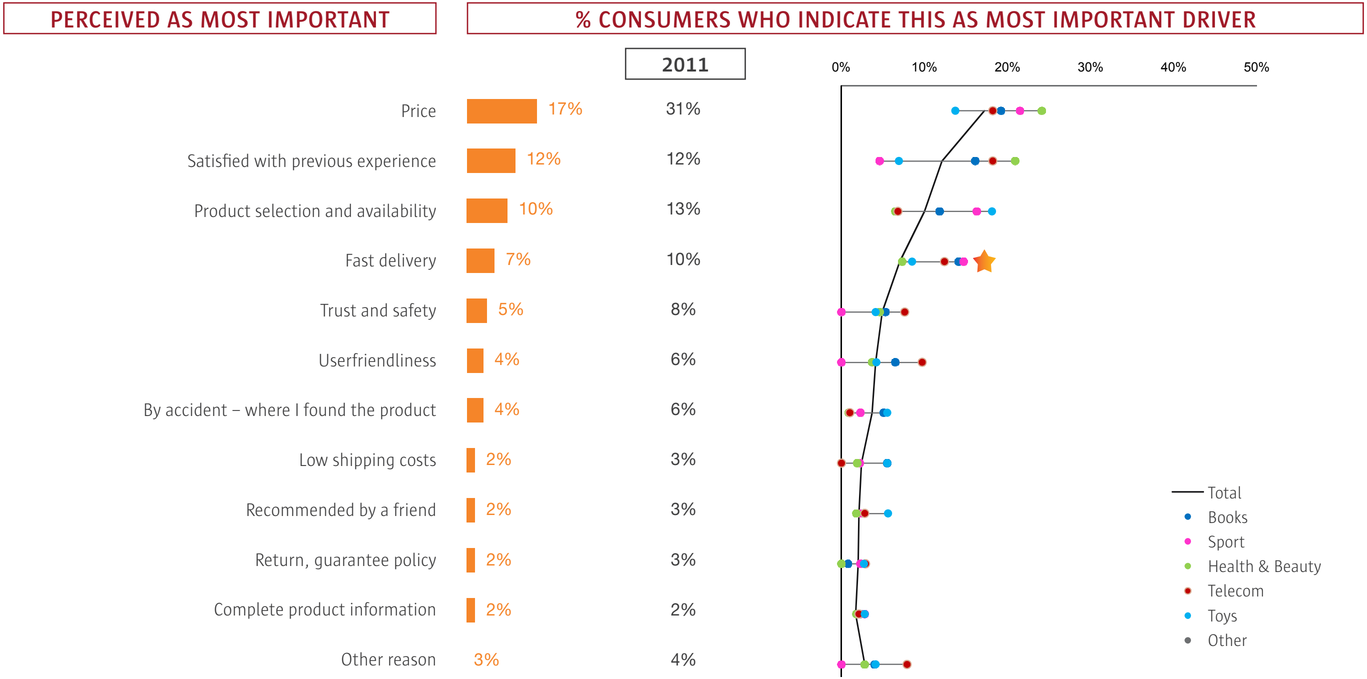
N(Electro) = 396, N(DIY) = 54, N(Fashion) = 377 N(Entertainment) = 317; N(Food) = 76; N(Interior) = 74 / F = Bought product before

★ Sign. higher than min. 1 other sector (95%)

Sector focus

Drivers website (sector details 2/2)

Q: Why did you use ‘website’ for your online purchase?



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Sector focus

Online payment (conclusions)

Almost half of the online shoppers pays online with a credit card.
This payment method exceeds offline payment with brank transfer and online payment with a debit card.

comeos entertainment

Online **payment with credit card** is the main payment method for products in the entertainment sector. Offline payment methods are hardly used for these transactions.

comeos interior

Offline bank transfers are not uncommon for online purchases of furniture and interior products, this might be explained by the price of the products in this sector.

comeos health & beauty

Transactions regarding fashion products bought online are mainly paid by **bank transfer** and **credit card.**

comeos food

In the food sector **offline payment methods** are the norm. Online payment methods are not (yet) used on a frequent basis.

comeos books

The online payment of books is done using a **credit card,** while the offline payment is often done through **bank transfer.**

comeos telecom

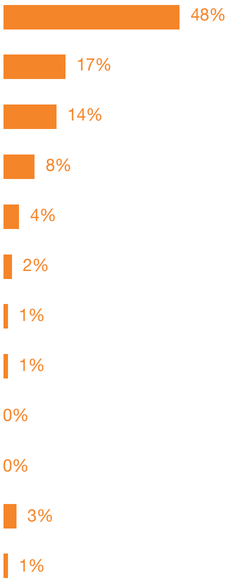
In the telecom sector online payment is often done by **debit card.** Online payments using a credit card are less common compared to the other sectors.

Sector focus

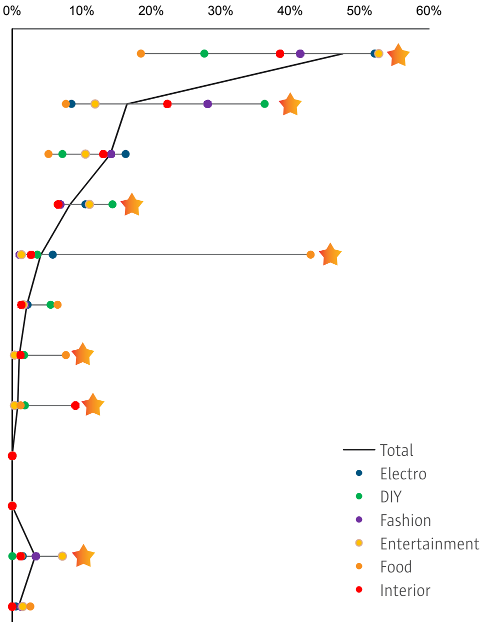
Payment method (sector details 1/2)

Q: How did you pay for it?

TRANSACTION PAYMENT METHOD



		2011
Online – Credit card (Visa, Mastercard, American Express…)	48%	43%
Offline – Bank transfer	17%	19%
Online – Bank card (Bancontact /Mister Cash)	14%	15%
Online – Paypal	8%	7%
Offline – By card at the point of sale	4%	1%
Offline – Cash at the point of sale	2%	3%
Offline – By card at the door	1%	5%
Offline – Cash at the door	1%	2%
Offline – Cheque	0%	0%
Offline – SMS payment	0%	0%
Online – Other	3%	4%
Offline – Other	1%	1%



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Sector focus

Payment method (sector details 2/2)

Q: How did you pay for it?

TRANSACTION PAYMENT METHOD

		2011
Online – Credit card (Visa, Mastercard, American Express...)	48%	43%
Offline – Bank transfer	17%	19%
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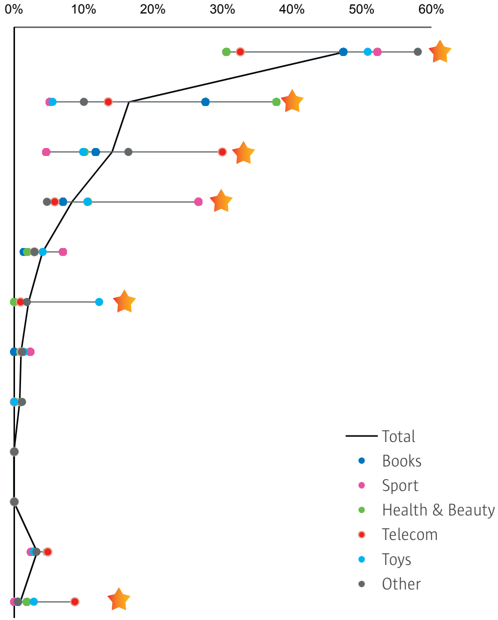

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Sector focus

Delivery (conclusions)

3 out of 5 online shoppers prefer home delivery. However, shoppers are not willing to pay more in return for flexible delivery timings.

DIY & garden

Do-it-yourself online shoppers perceive delivery timings between **9am and 6pm** as acceptable. They are willing to **pay more than €4 for home delivery** of their purchase.

entertainment

There is a high preference for **home delivery** when buying entertainment products online. Shoppers within this sector are **not willing to pay more than €7,5.**

interior

Home delivery is most appreciated for purchases within the interior sector. Shoppers are **willing to pay more than €10** for the delivery of their online purchased goods.

fashion

For fashion products delivery preference goes to, besides home delivery, **pick-up at pick-up point.**

food

Online food shoppers prefer **picking up** their online ordered goods **in the store.** Home delivery is less desired. Shoppers have a high **willingness to pay more in return for flexible pick-up hours.**

books

Home delivery is desired when buying books online. The need for flexible delivery times are less present.

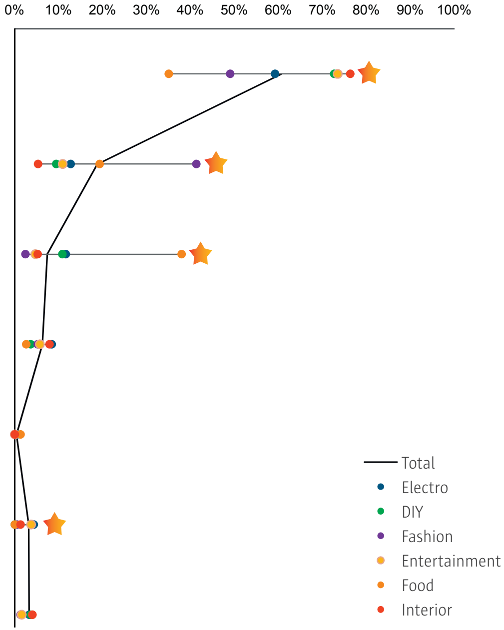
Sector focus

Delivery preference (sector details 1/2)

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

DELIVERY PREFERENCE

		2011
Home delivery	61%	66%
Pick-up at pick-up point	19%	15%
Pick-up at the shop	7%	8%
Delivery at work	6%	6%
Pick-up in a locker	0%	0%
Other	3%	2%
Does not matter to me	3%	3%



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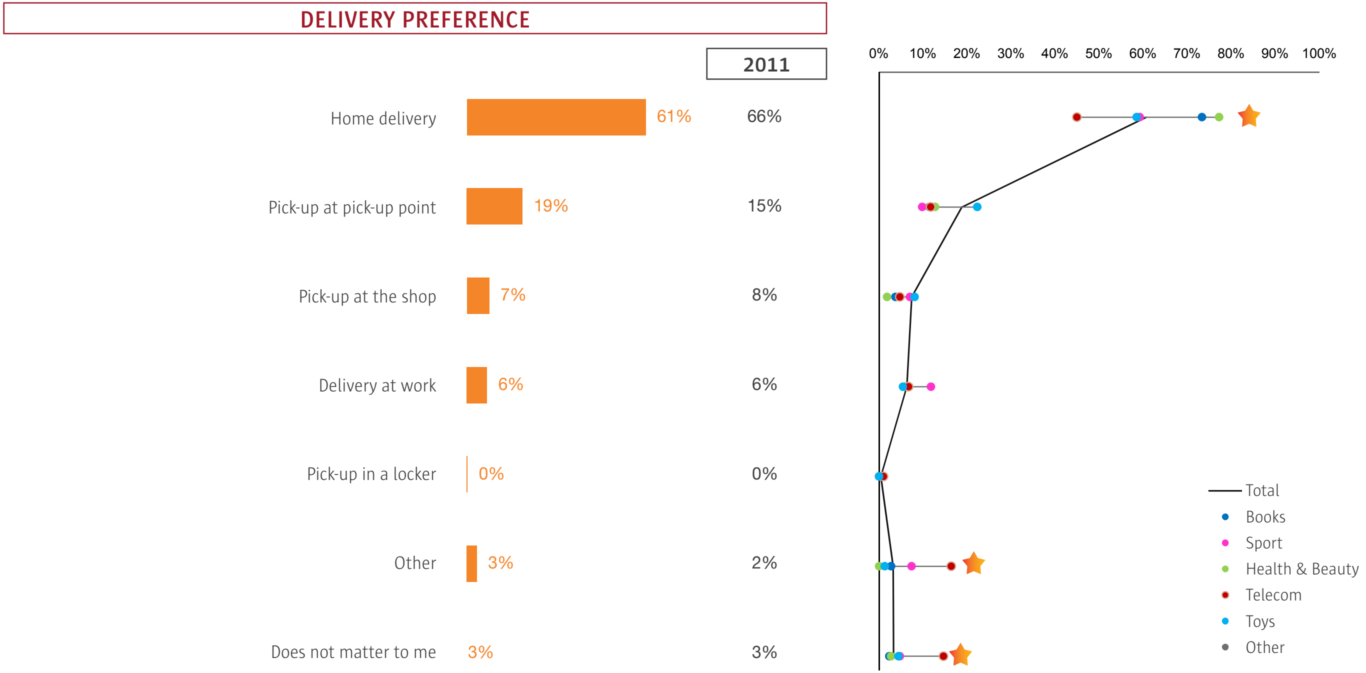
Sector focus

Delivery preference (sector details 2/2)

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



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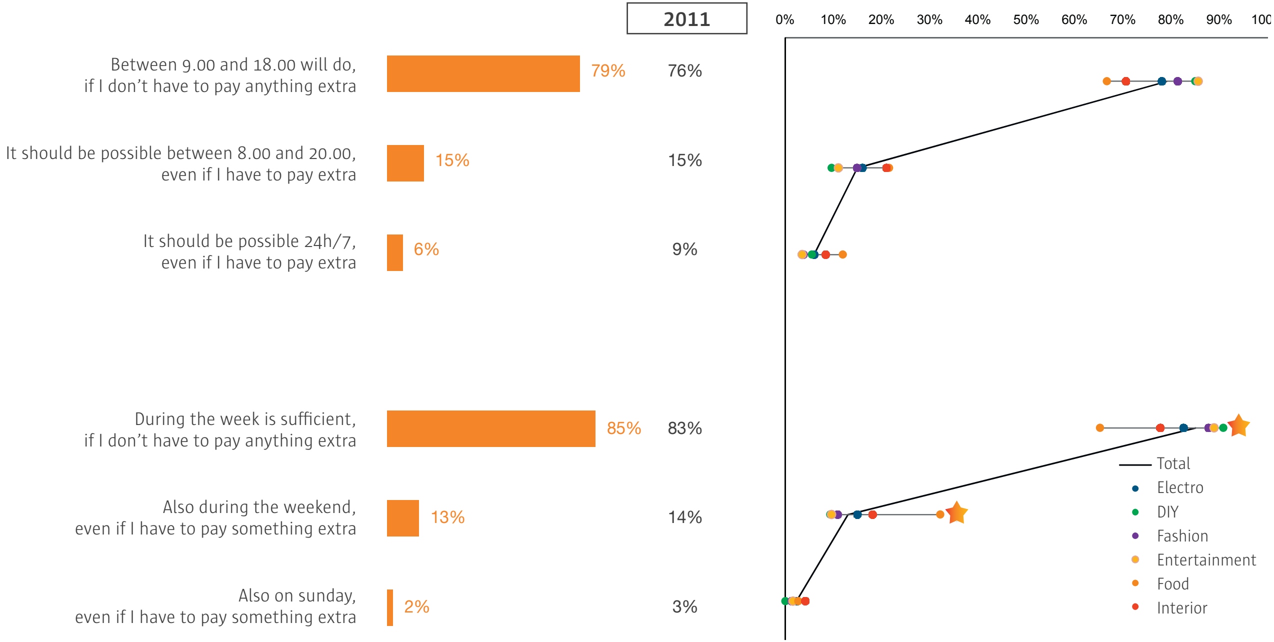
Sector focus

Delivery time (sector details 1/2)

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

DELIVERY TIME



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Sector focus

Delivery time (sector details 2/2)

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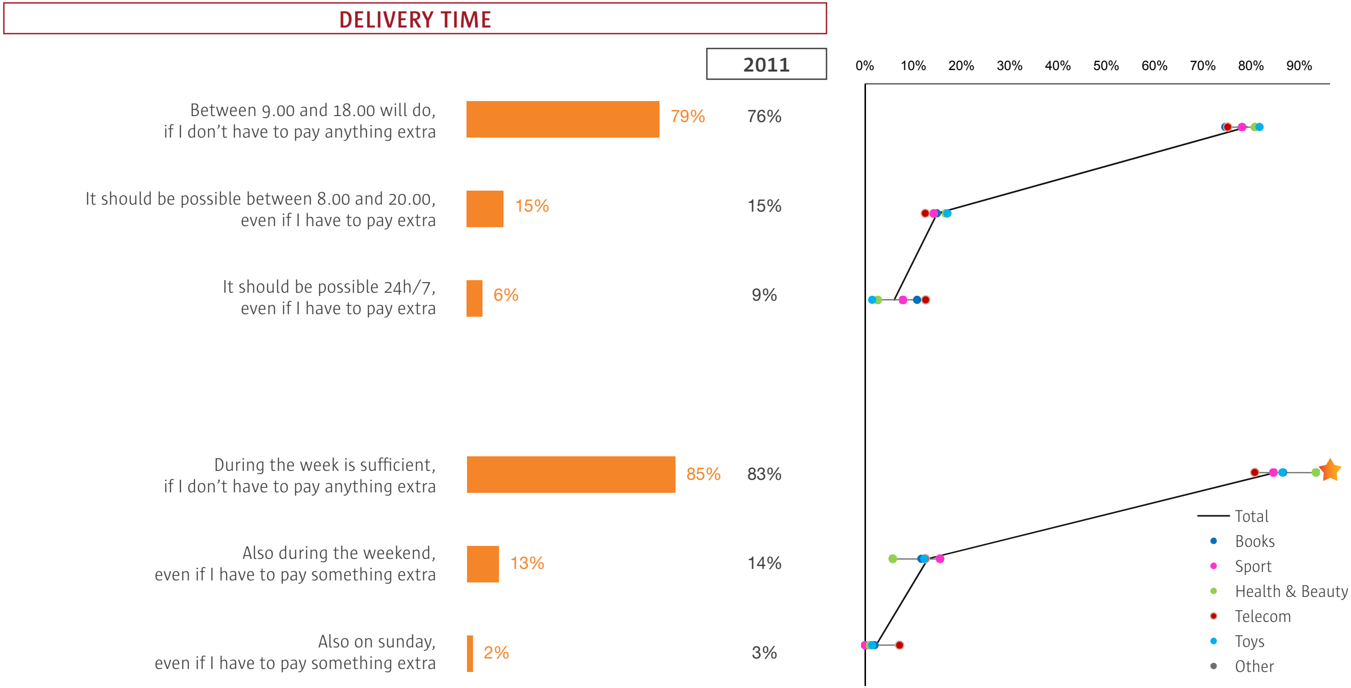

		2011
Between 9.00 and 18.00 will do, if I don’t have to pay anything extra	79%	76%
It should be possible between 8.00 and 20.00, even if I have to pay extra	15%	15%
It should be possible 24h/7, even if I have to pay extra	6%	9%
During the week is sufficient, if I don’t have to pay anything extra	85%	83%
Also during the weekend, even if I have to pay something extra	13%	14%
Also on sunday, even if I have to pay something extra	2%	3%

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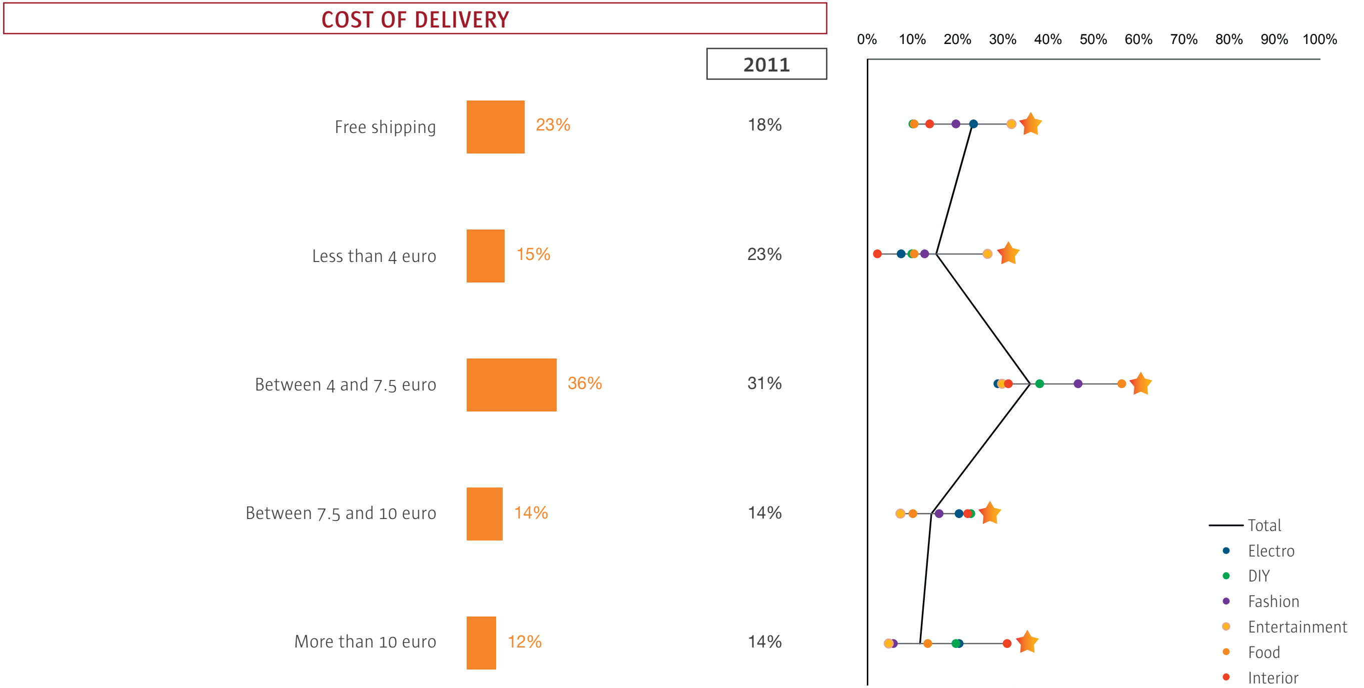
Sector focus

Delivery price (sector details 1/2)

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



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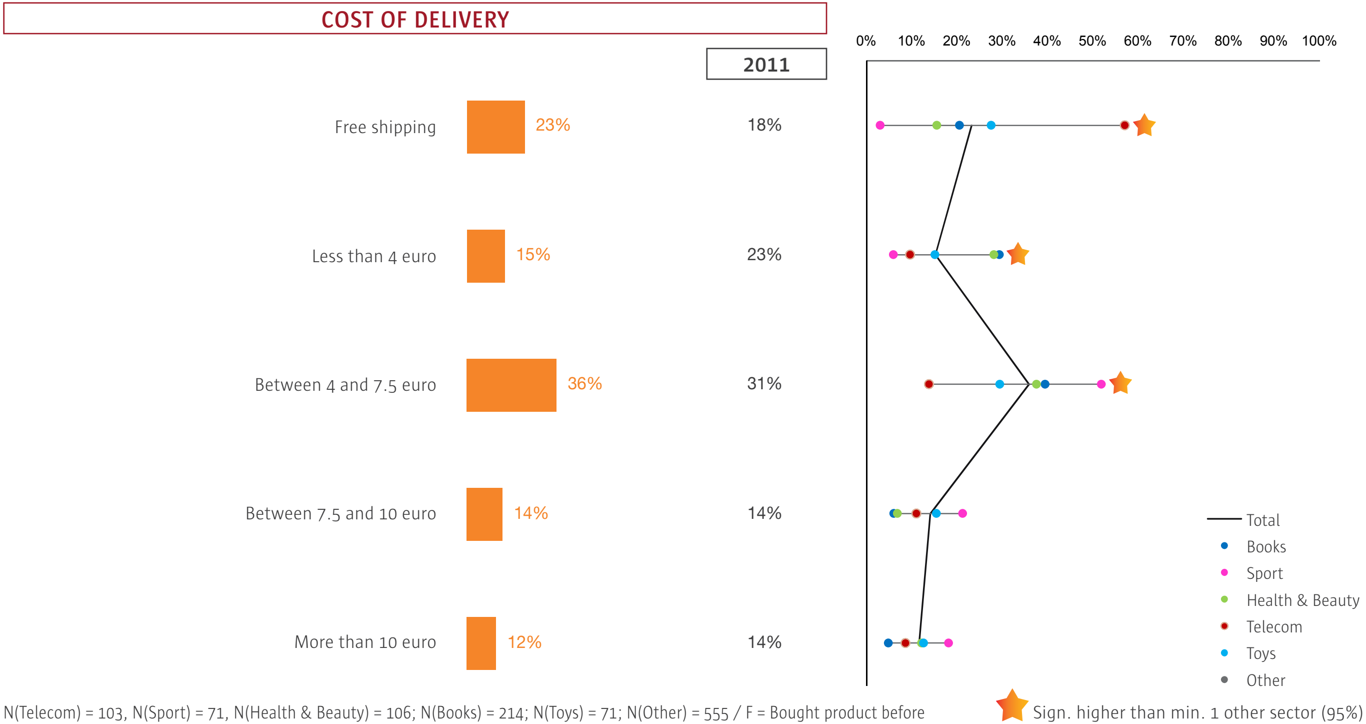
Sector focus

Delivery price (sector details 2/2)

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



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E-commerce trust & attitude

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for commerce and services

47% of online shoppers prefers Belgian to foreign websites.

Shoppers trust e-commerce activities more than they did in the past, which results in an increase in the amount and the variety of products bought online.

Barriers towards online payment with a credit card and purchase on unknown websites are less present.

E-commerce trust

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

In general, online shoppers are rather reserved when it comes to buying products from other internet users or on unknown websites.

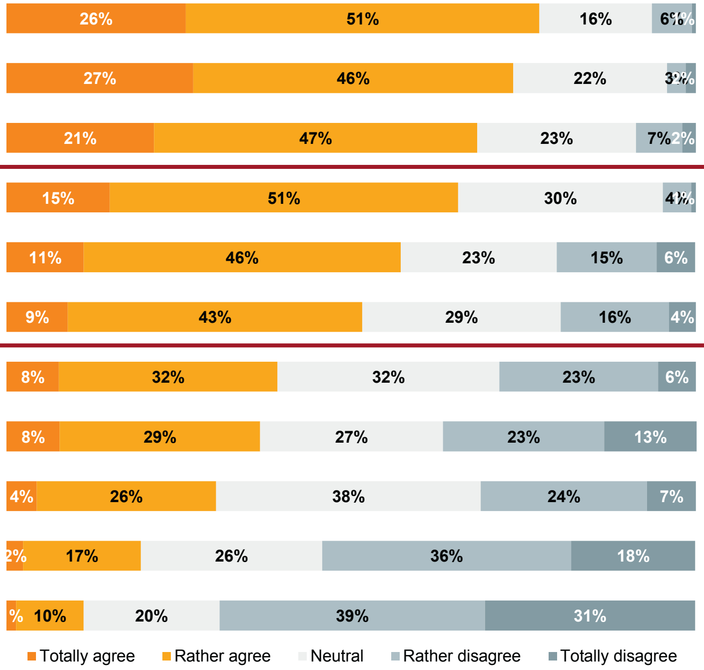
N = 1058 / F = No filter

E-commerce trust

(detail)

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

The **trust in e-commerce keeps growing,** which results in a **growth in the amount and variety of products bought online.** Barriers towards online payment are less outspoken.

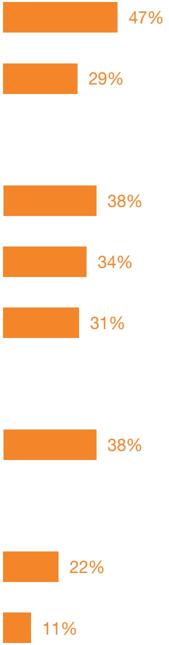


	Top 2% 2012	Top 2% 2011	Difference 2012-2011
I would only purchase products and/or services on familiar and reliable sites	77%	74%	3%
I find it important for an e-commerce website to be certified by an independent body	74%	69%	-5%
I find a transfer a reliable method of payment for an online purchase	68%	62%	6%
I have faith in e-commerce	66%	59%	7%
I find it safe to pay for an online purchase with a credit card	57%	48%	9%
I am open to purchasing a broad range of products and/or services online	52%	46%	6%
I frequently purchase products and/or services online	39%	39%	0%
I have no inhibitions when it comes to buying products and/or services online	37%	31%	6%
I am open to purchasing products from other Internet users on the Internet	30%	29%	1%
I would also buy products and/or services on websites I do not know	20%	19%	1%
I would also buy expensive, risky products and/or services online	11%	13%	-2%

N = 1058 / F = No filter

E-commerce attitude

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



% CONSUMERS WHO AGREE / TOTALLY AGREE		2011
I prefer an online purchase via a Belgian website to one via a foreign website	47%	46%
I think foreign websites for online purchases are less reliable than Belgian websites	29%	28%
I prefer delivery by courier	38%	39%
I prefer delivery by mail	34%	36%
I prefer delivery via pick-up point	31%	26%
I prefer online payments to offline payments	38%	34%
I think a purely online website without offline counterpart is less reliable than an online website with an offline counterpart	22%	21%
I prefer an online purchase with a purely online website without offline counterpart to a website with an offline counterpart	11%	13%

1 in 2 online shoppers has a preference for Belgian websites, 30% perceives foreign websites as less reliable.

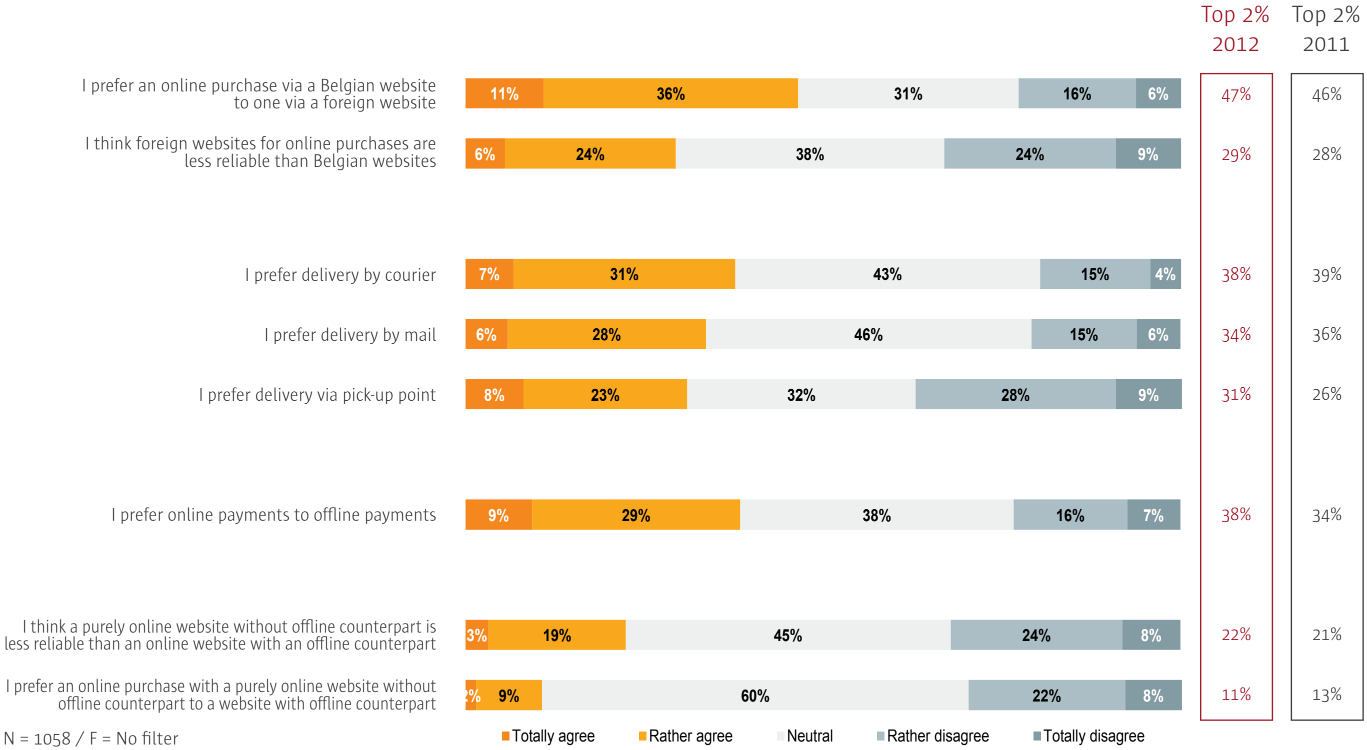
78% believes an offline shop increases website reliability.

N = 1058 / F = No filter

E-commerce attitude

(detail)

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



N = 1058 / F = No filter

Internet fraud

comeos

for commerce and services

4% has experienced some kind of deception during online shopping.

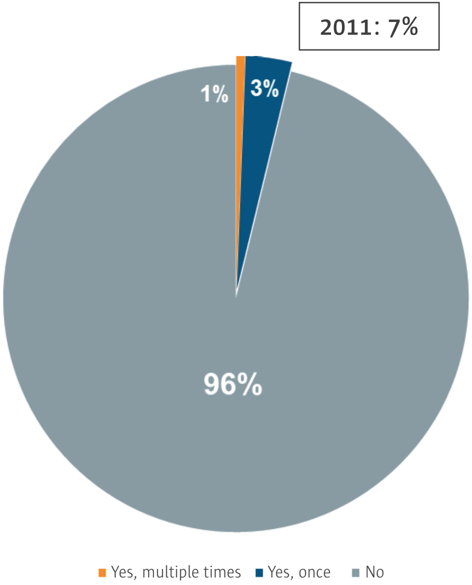
In half of those cases, deception was caused by payment issues.

29% of fraud manifestations stay unsolved.

Internet fraud

Exposure

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



The occurrence of Internet fraud is very limited.

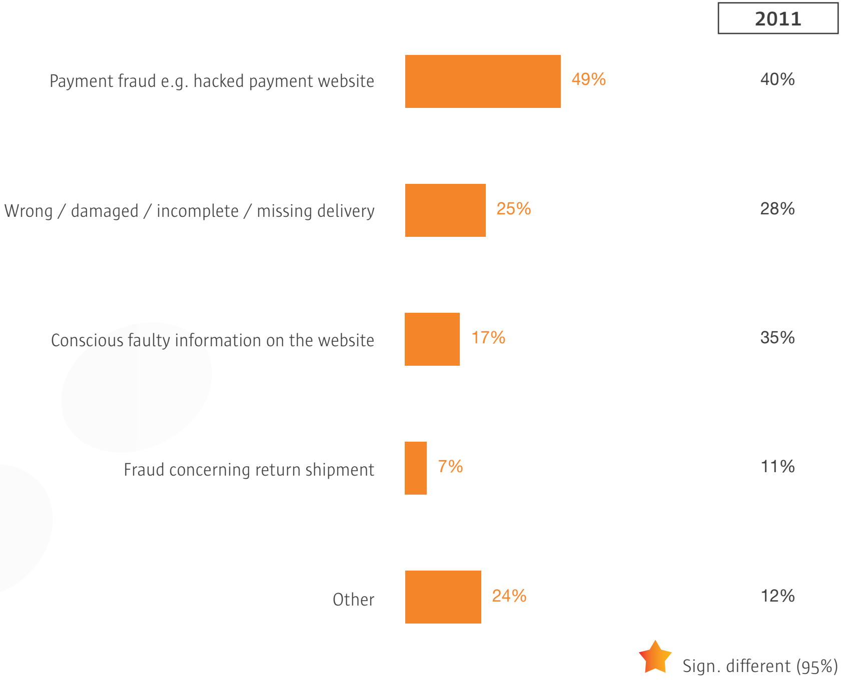
Only 4% has been confronted with fraud related to their purchase in the past 12 months.

N = 1058 / F = No filter

Internet fraud

Type of fraud

Q: What is the best description of this internet fraud?



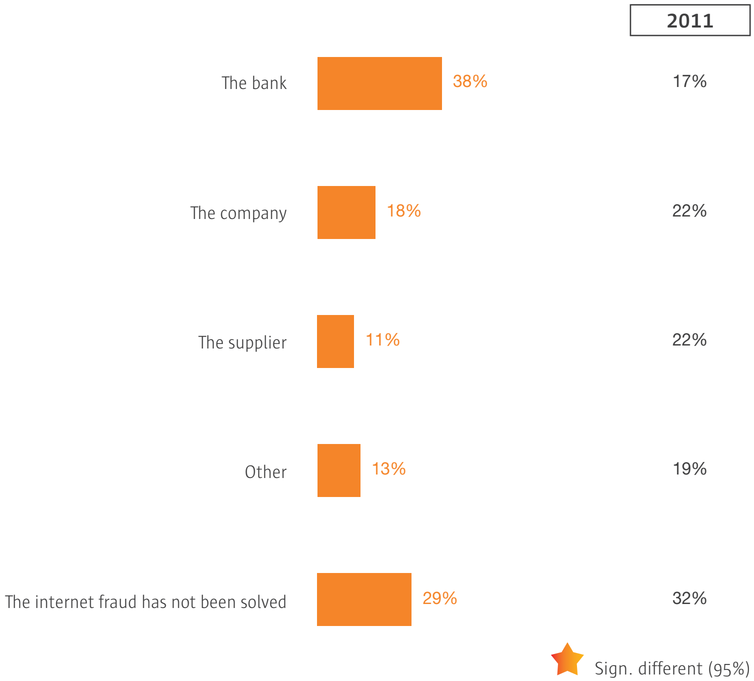
In 50% of the cases, the internet fraud is payment related.

N = 45 / F = When been confronted with internet fraud in past 12 months

Internet fraud

Solving the fraud

Q: Who solved this internet fraud?



The majority of internet fraud cases are handled and solved by the bank. However, in 29% of the cases it remains unsolved.

N = 45 / F = When been confronted with internet fraud in past 12 months

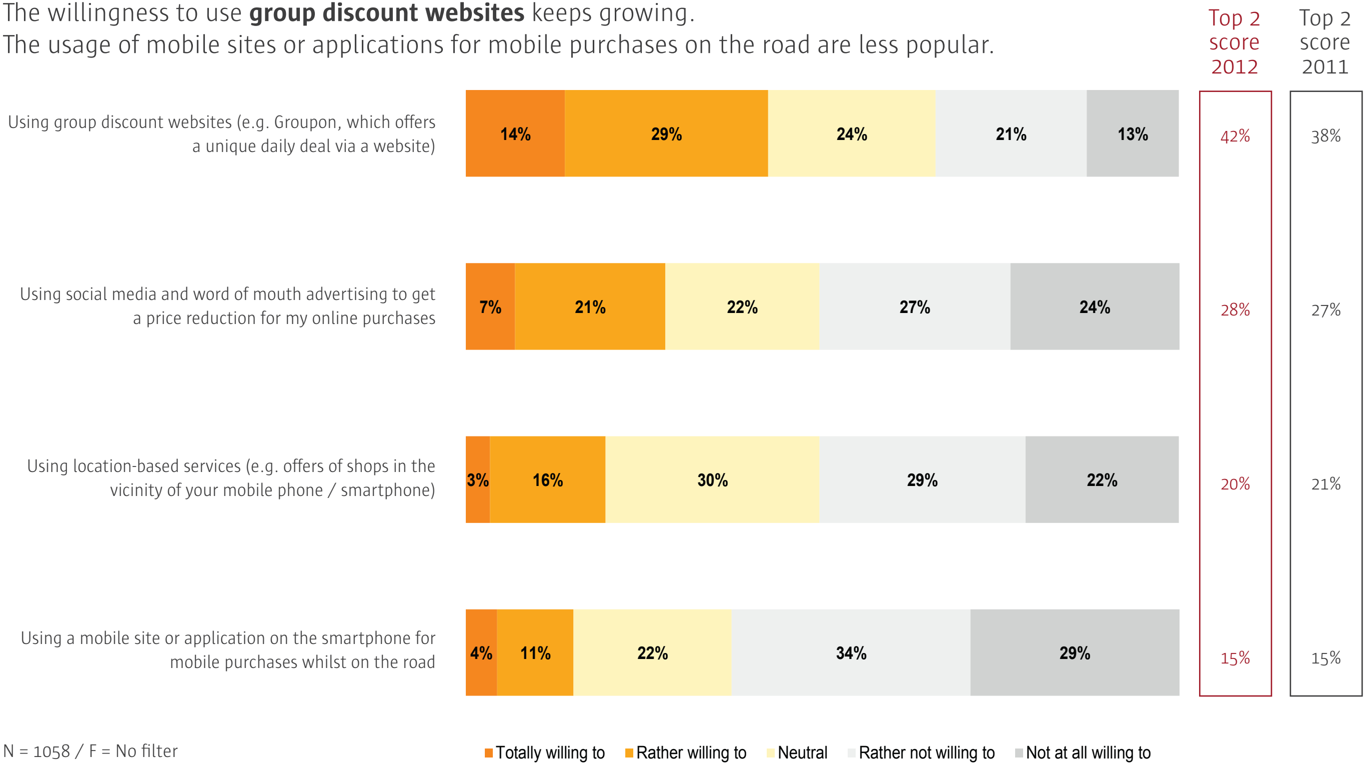
E-commerce trends

for commerce and services

E-commerce trends

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

The willingness to use **group discount websites** keeps growing.
The usage of mobile sites or applications for mobile purchases on the road are less popular.



N = 1058 / F = No filter

www.comeos.be