



E-commerce

Belgium 2013





Introduction

Without commerce, e is just a letter

For the third year in a row, we have conducted the most comprehensive online survey of its kind. And year after year, we have seen how online business is steadily growing. I don't believe in the e-commerce revolution – some devastating shock that will destroy our shopping landscape, that will close all physical shops and turn shopping malls into ghost cities.

Our survey shows that e-commerce is a process. Online shopping is growing, we are convincing more and more people to try out the virtual shopping experience.

But you'll discover in this survey, just as we have, that there are some threats we need to take seriously. There are issues with trust, with security. And people turn to the brands they trust. Not only the household names that have always been around – pure players are able to gain trust and reputation very fast.

A new development is that for the first time, price has taken over the number 1 position as main driver for e-commerce, becoming more important than comfort and time. This could have a tremendous impact on the way retailers conduct their business.

Dominique Michel,
Ceo Comeos

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Download the full survey
on www.comeos.be

Colophon

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The background features a gradient from dark red on the left to bright orange on the right. Several overlapping, semi-transparent circles in various shades of orange and yellow are scattered across the scene. The text is centered in the upper-left quadrant.

Objectives & methodology





Objectives & methodology

Background

Comeos represents **Belgian commerce & services**.

Our members are active in 18 sectors and sell 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.

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 3rd 2013 - april 15th 2013
Scope: Belgium

Sample

N = 1062

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' & 'E-commerce in Belgium 2012'

Same period of field (April 2011 & April 2012) 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



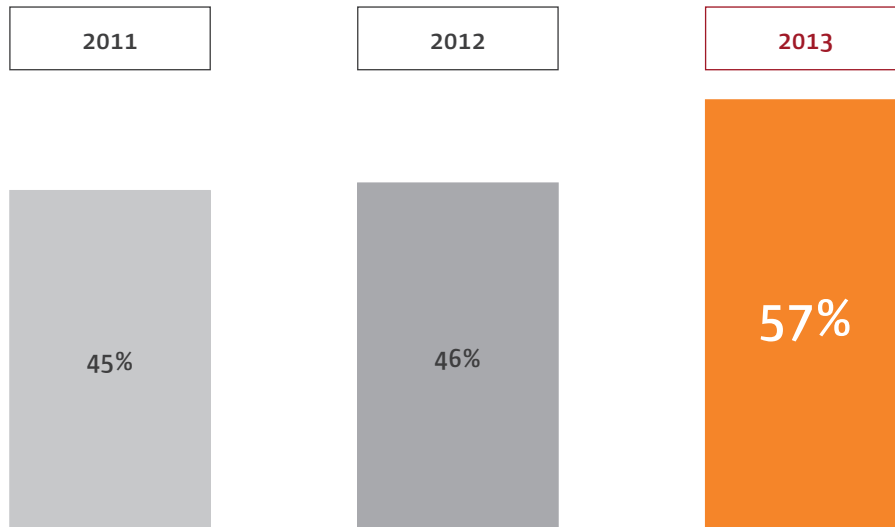


57% of the Belgian population has made an online purchase **in the last year**.

59% of the Belgian population has **ever** made an online purchase.

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)?

PAST 12 MONTHS



+13%

Of the Belgian population has made an online purchase in the last year

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)?

PURCHASED ONLINE LAST YEAR

2013

2012

2011

ONLINE POPULATION

70%

59%

58%

BELGIAN POPULATION*

57%

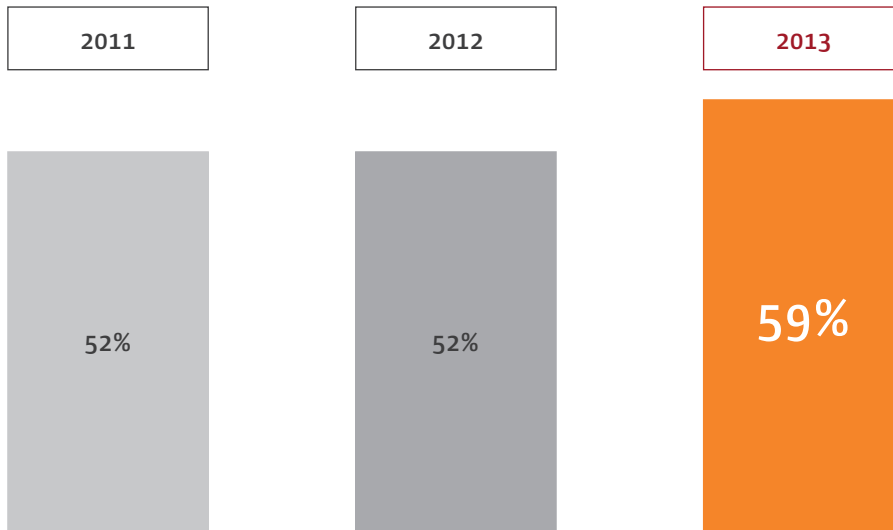
46%

45%

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

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



+7%

Of the Belgian population has ever made an online purchase

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)?

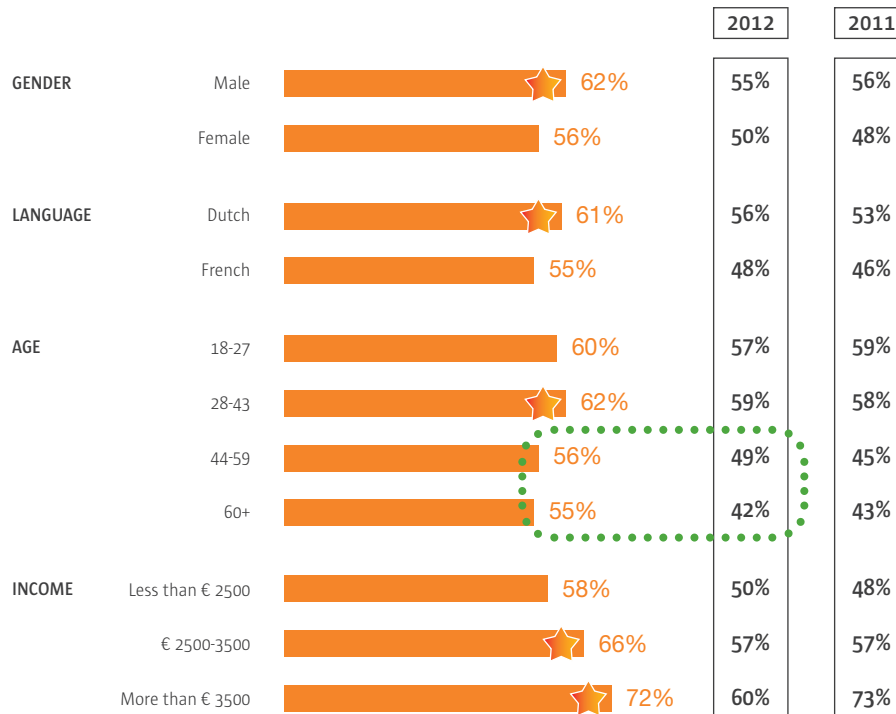
	EVER PURCHASED ONLINE			PURCHASED ONLINE LAST YEAR		
	2013	2012	2011	2013	2012	2011
ONLINE POPULATION	75%	67%	66%	70%	59%	58%
BELGIAN POPULATION*	59%	52%	52%	57%	46%	45%

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

E-commerce experience

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)?



Share of 'older' online buyers increases – last ones to be convinced

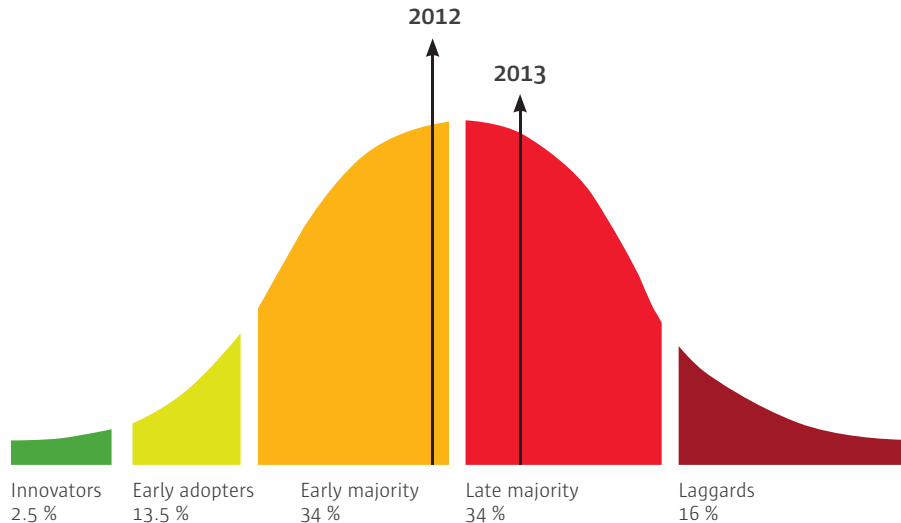
★ Sign. difference (95%)

Roger's Innovation Adoption Curve

"Trying to convince the mass of a new idea is useless. Convince innovators and early adopters first."

REMEMBER THIS SLIDE?

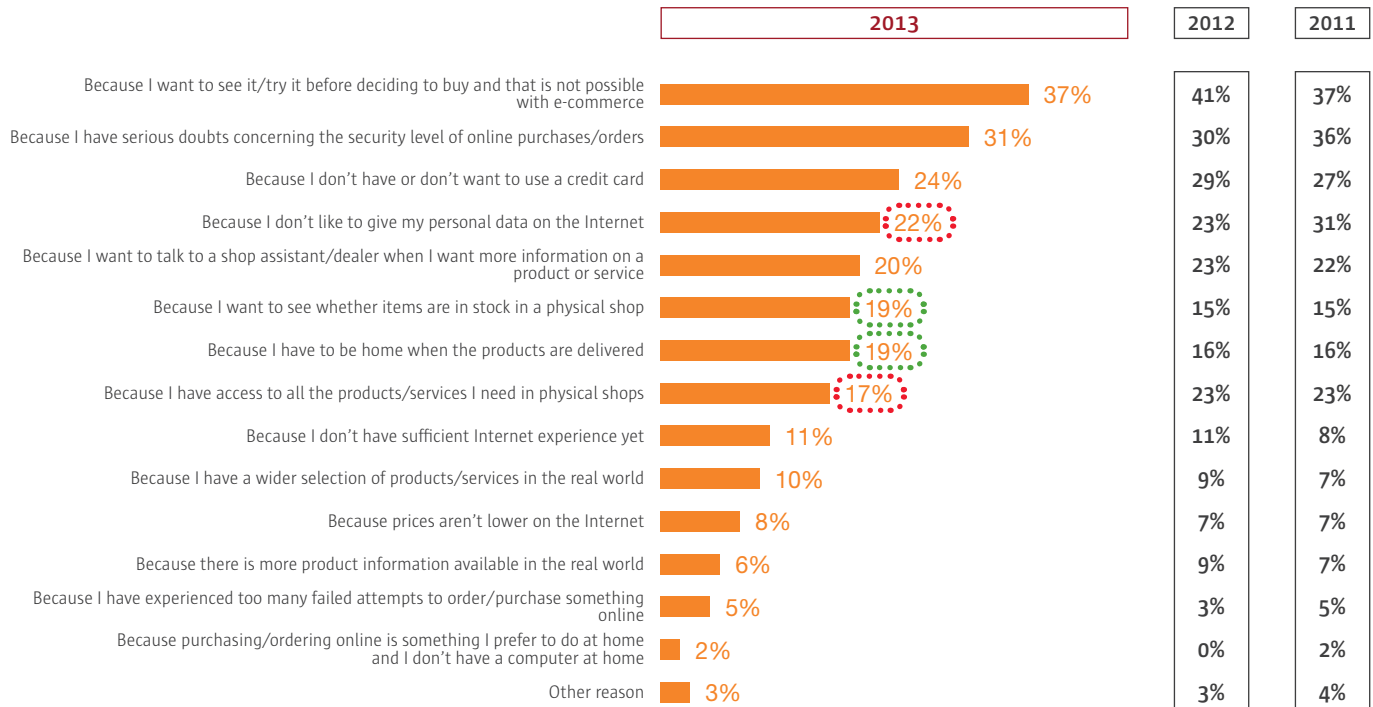
"The late majority is about to use e-commerce websites for purchasing 1st hand products and services. E-commerce becomes a worthy alternative for offline retail activities."



E-commerce experience

Barriers


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



N = 456 / F = Only if never purchased online before

Current online shopping behaviour





24% makes monthly purchases.

That is an **8%** increase.

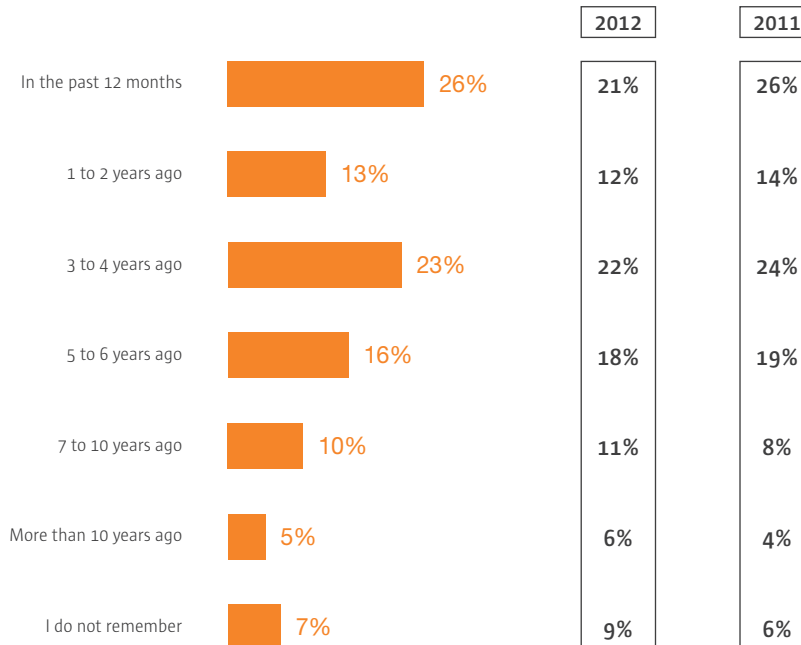
On average, we spend **more than**

2.000 euros a year - online.

E-commerce experience

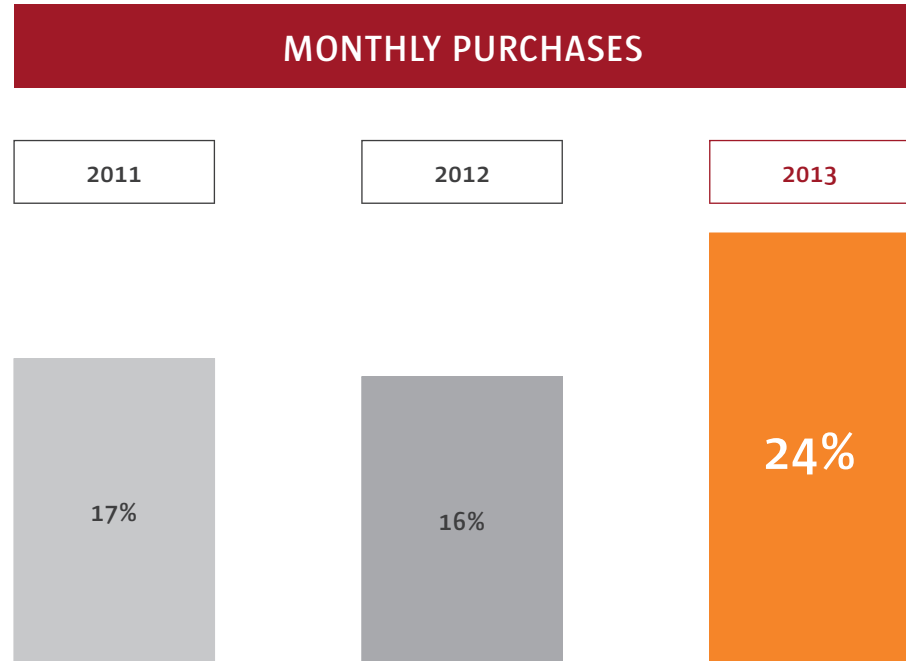
Experience

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



1 out of 4 online buyers made the first purchase in the last 12 months

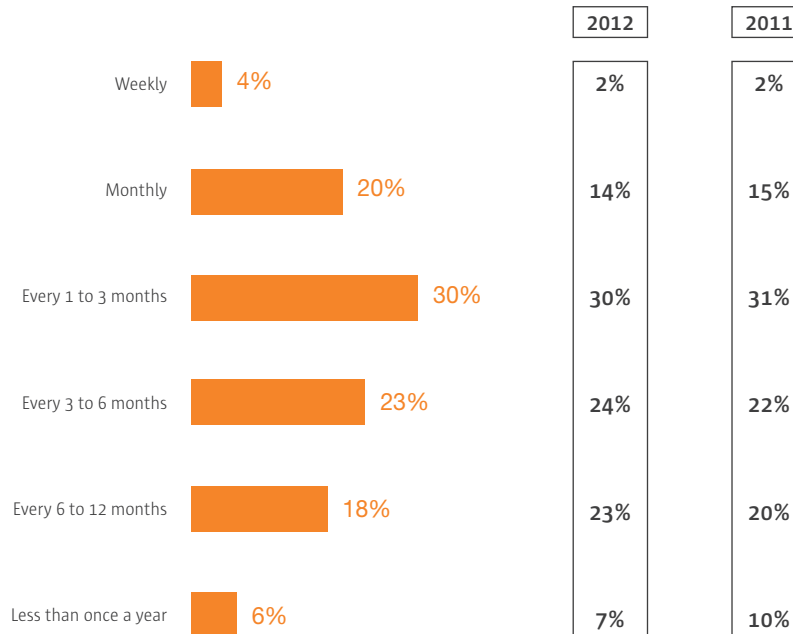
Q: How frequently do you buy something via the Internet (for personal purposes)?



E-commerce experience

Frequency

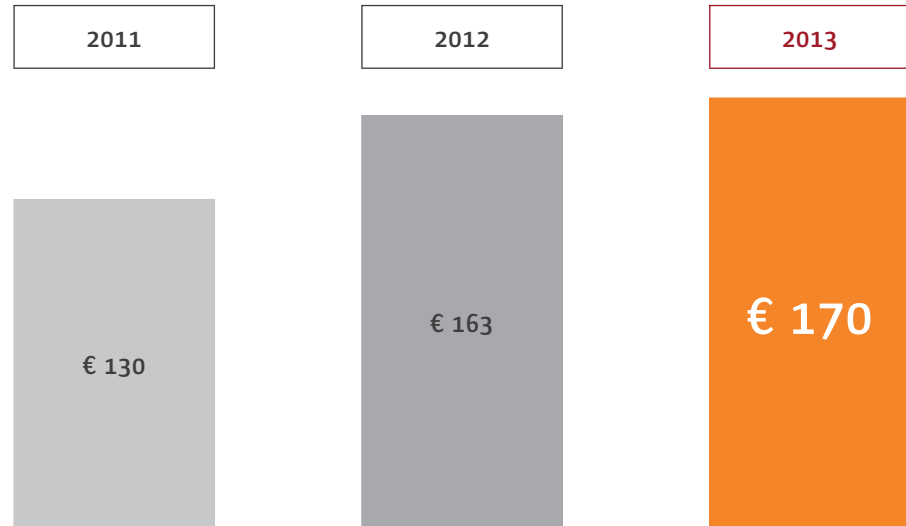
Q: How frequently do you buy something via the Internet (for personal purposes)?



The frequency of
online purchases
increases

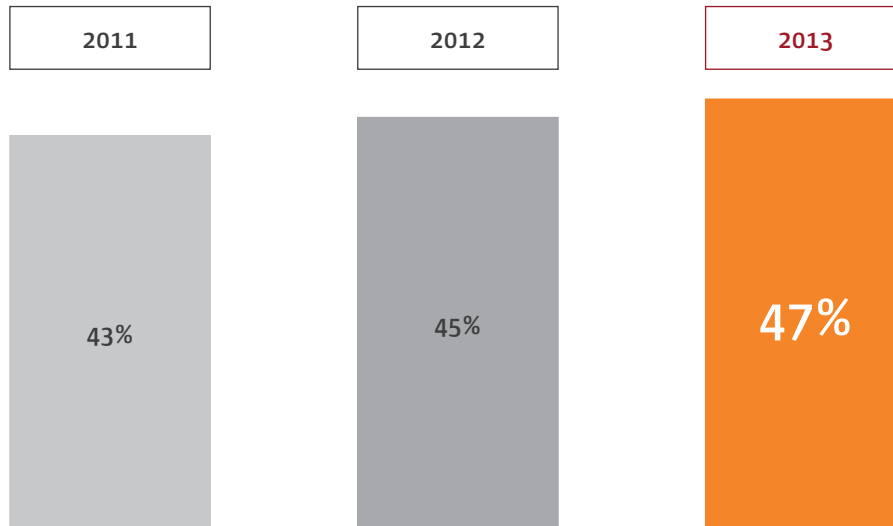
Q: How much did you spend online in the past month?

AVERAGE SPENDING PER MONTH



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

MORE THAN € 100 PAST MONTH



E-commerce experience

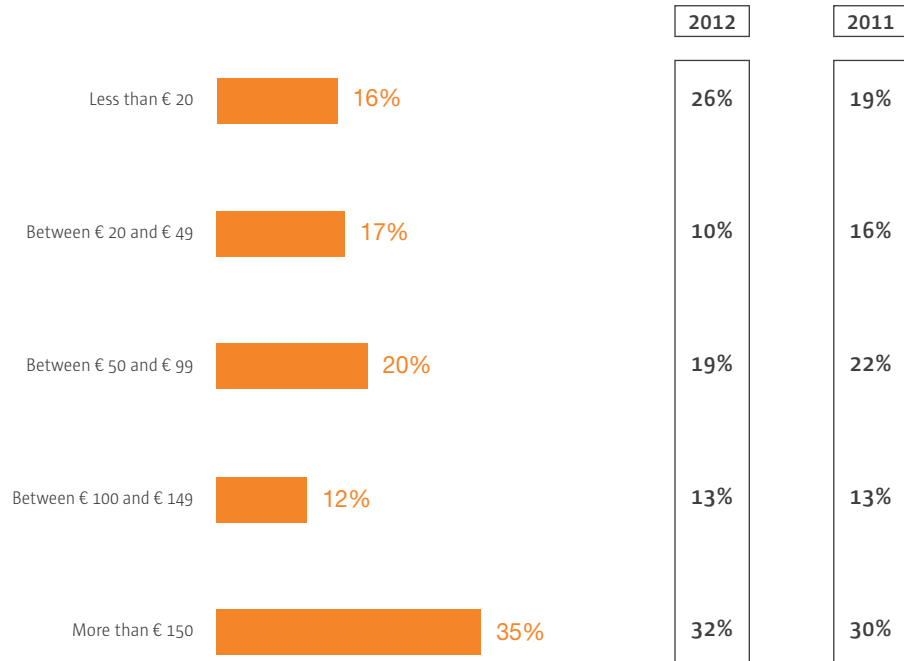
Current online shopping behaviour

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

Average 2013
€ 170 / month
(€ 2.040 / year)

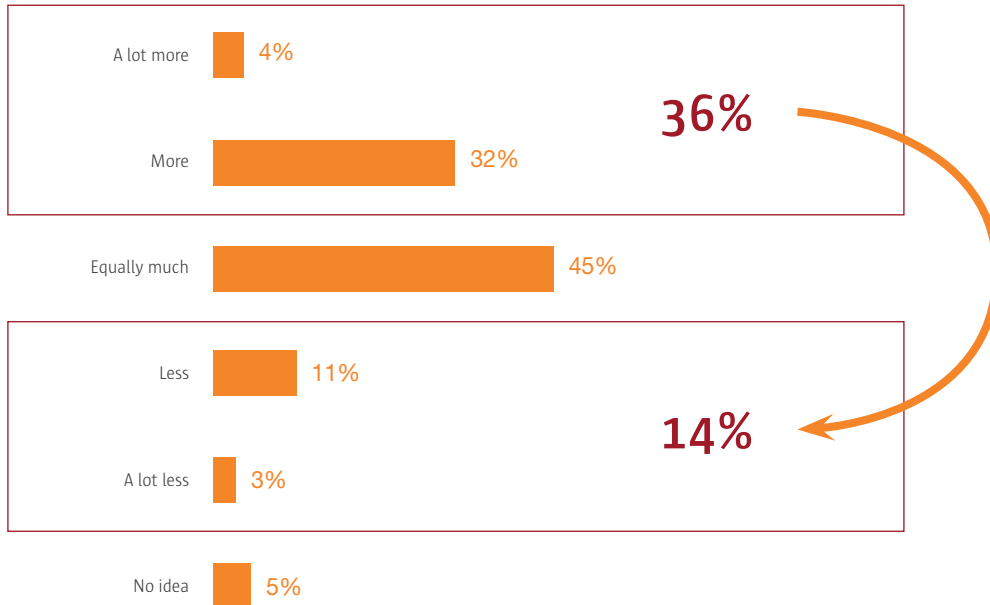
Average 2012
€ 163 / month
(€ 1.944 / year)

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



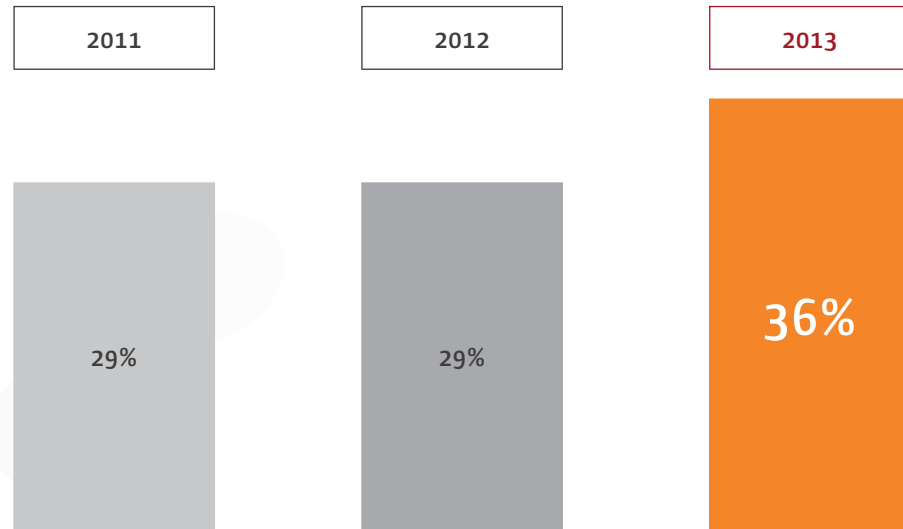
Q: Do you spend less or more now than you did 1 year ago?

SPENDING BEHAVIOUR COMPARED TO LAST YEAR



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

SPENDING BEHAVIOUR COMPARED TO LAST YEAR

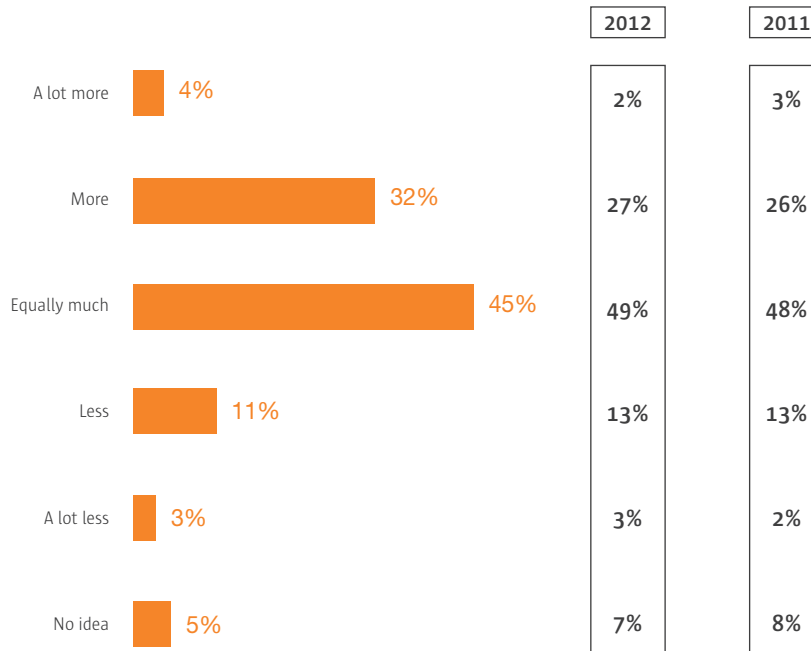


13% spends more
online

E-commerce experience

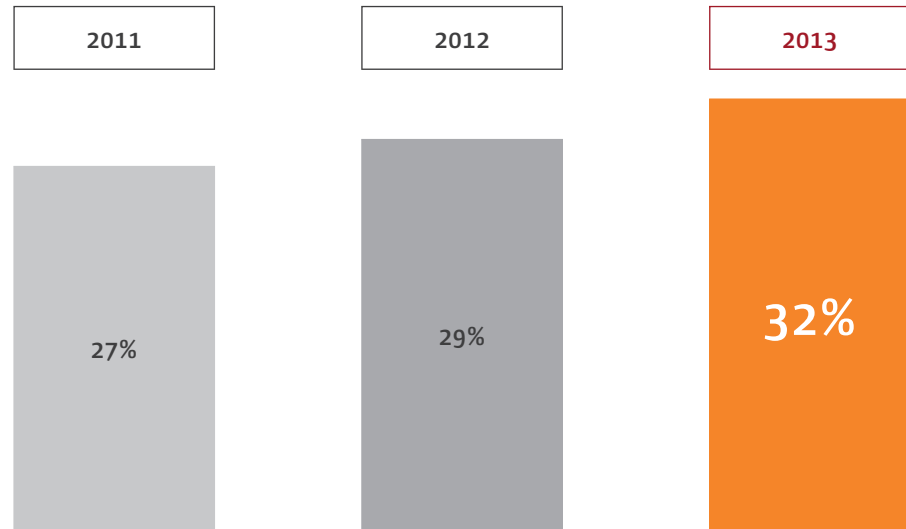
Evolution budget

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



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

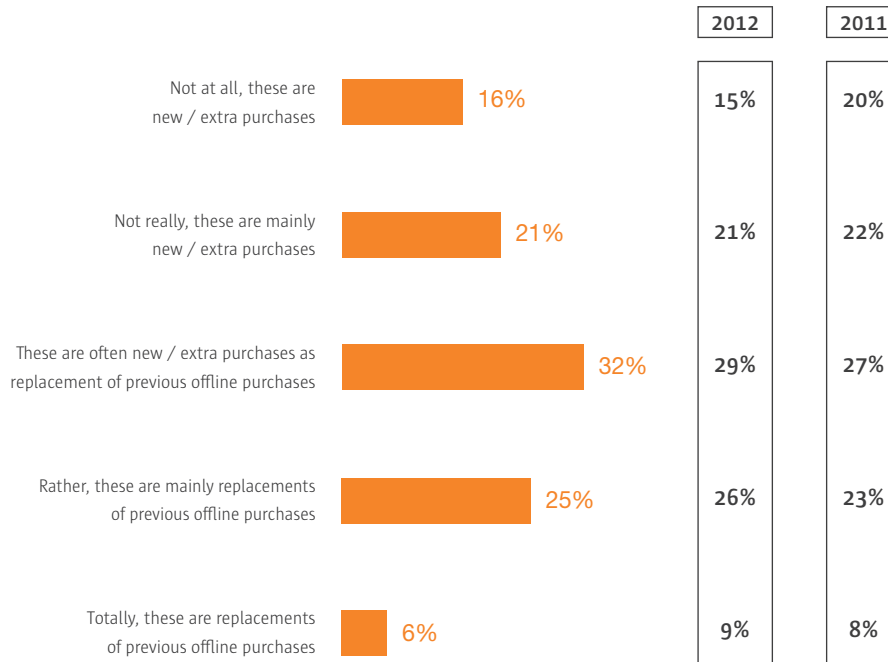
BUYING BEHAVIOUR - EQUALLY NEW AS REPLACEMENT



E-commerce experience

Substitution offline purchases

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




Online still doesn't
replace offline
purchases

The background is a solid green color with several overlapping, semi-transparent circles of varying shades of green. The circles are arranged in a way that they appear to be floating or overlapping each other, creating a layered effect. The text 'Online purchases' is positioned on the left side of the image, overlaid on the green background.

Online purchases





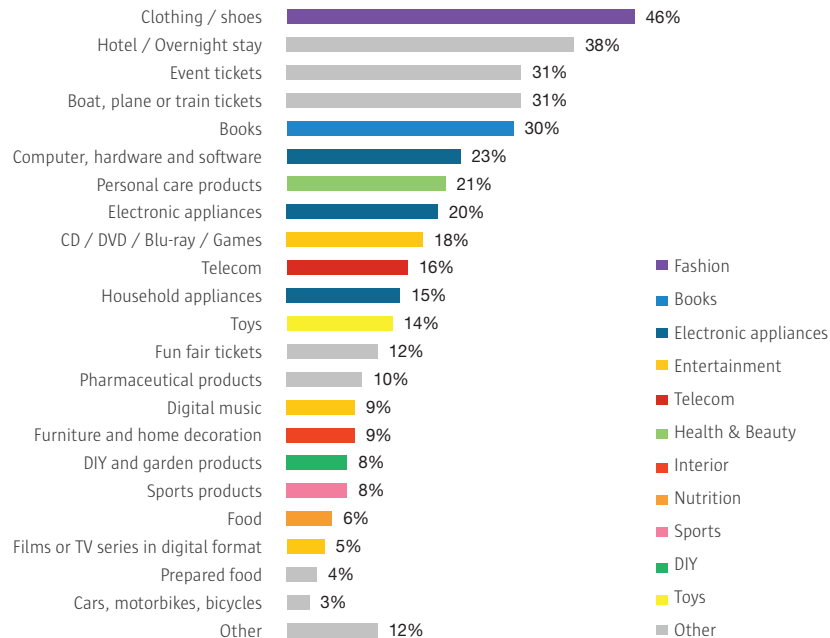
52% bought food **more than 5 times.**

89% of buyers will buy again
in the next 12 months.

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?



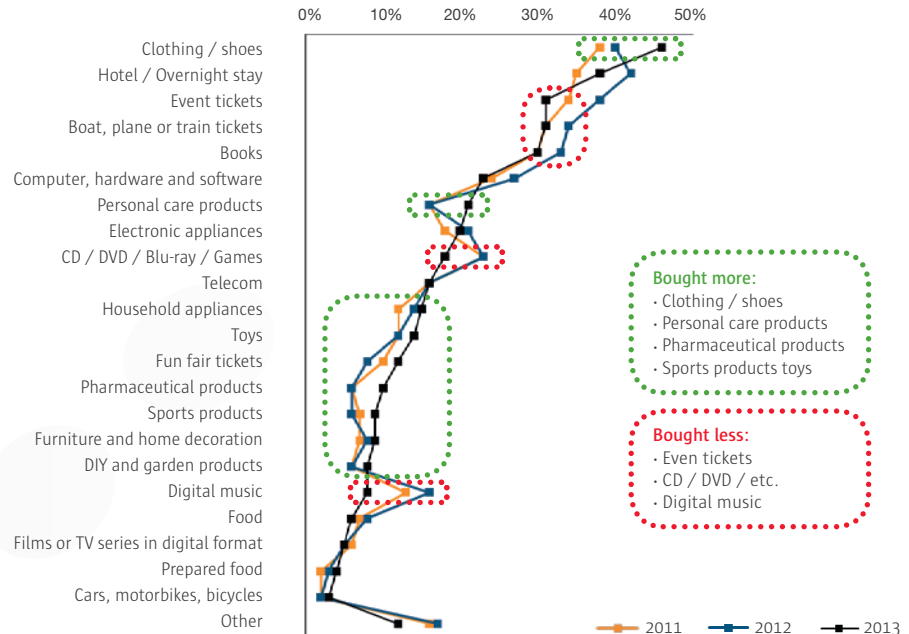
N = 1062 / F = None

Clothing & shoes
most popular item –
for the first time!

Online purchases

Current purchase new products - Evolution

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



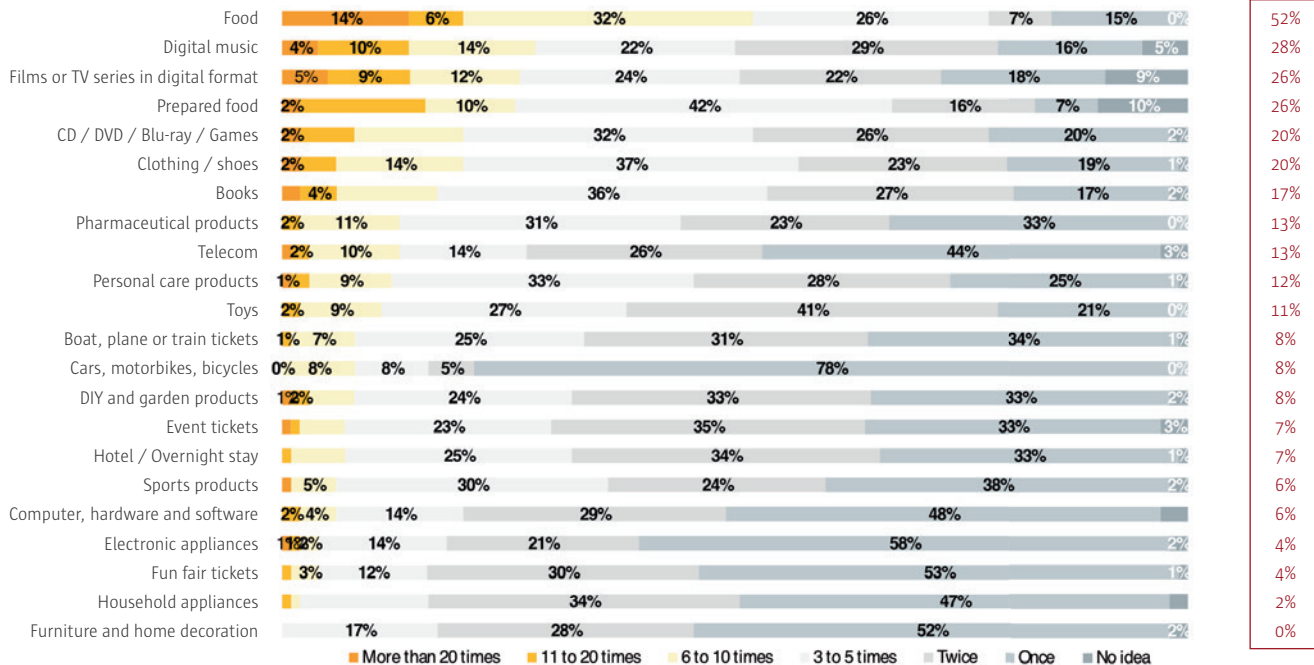
This is an evolution,
no revolution: minor
shifts in shopping
behaviour

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.

MORE THAN 5 TIMES

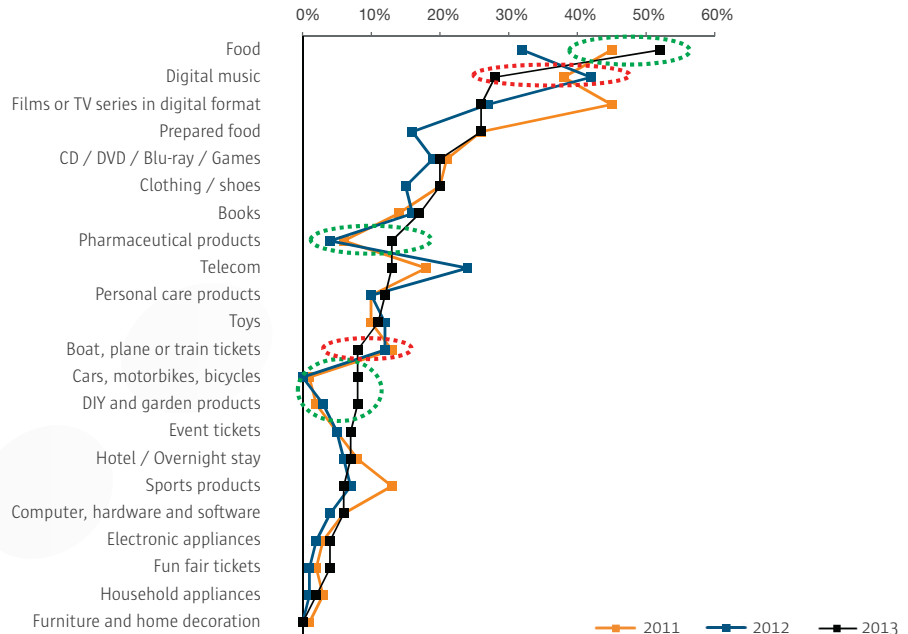


N = min 33 (cars, motorbikes/bikes) / F = if purchased online

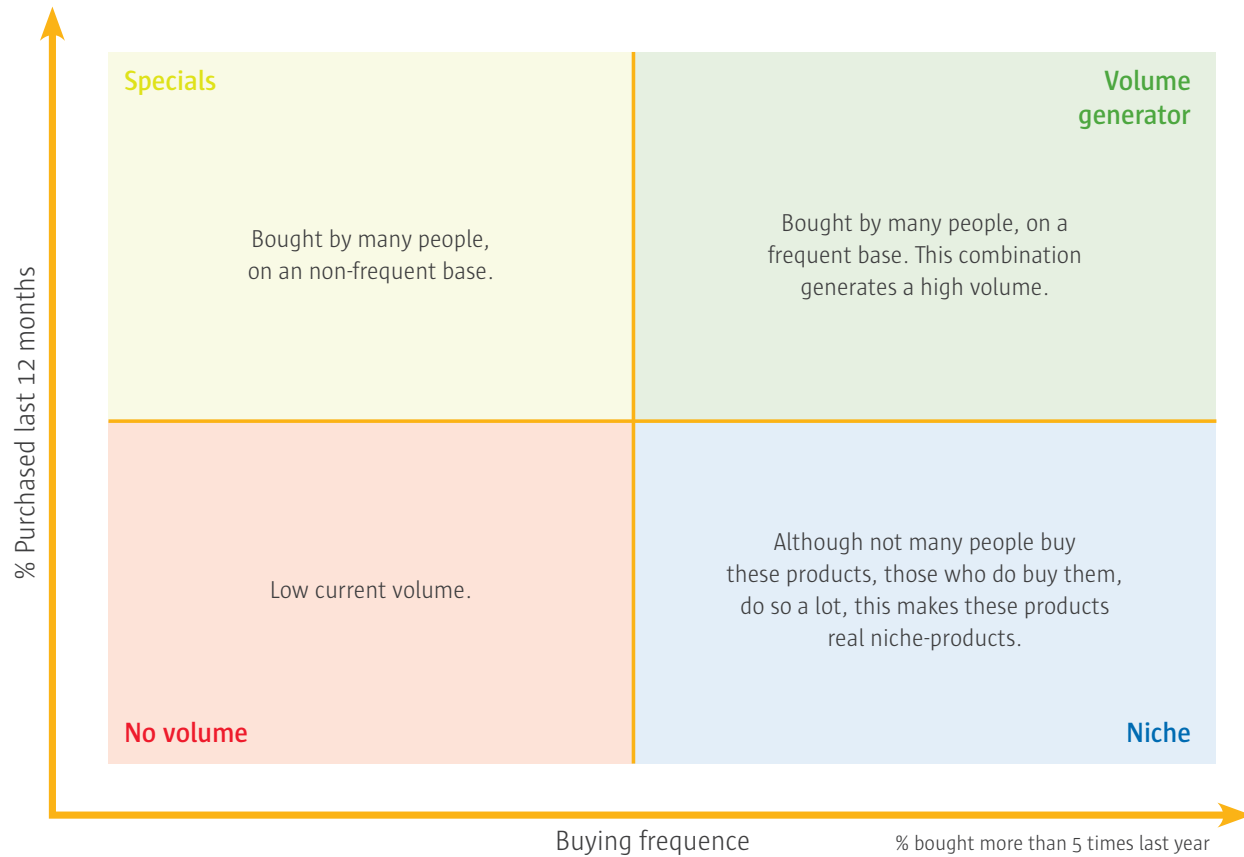
Online purchases

Frequency current online purchases - Evolution

Q: Please indicate how often you bought the following new products via the Internet (for personal purposes) in the past 12 months (more than 5 times).



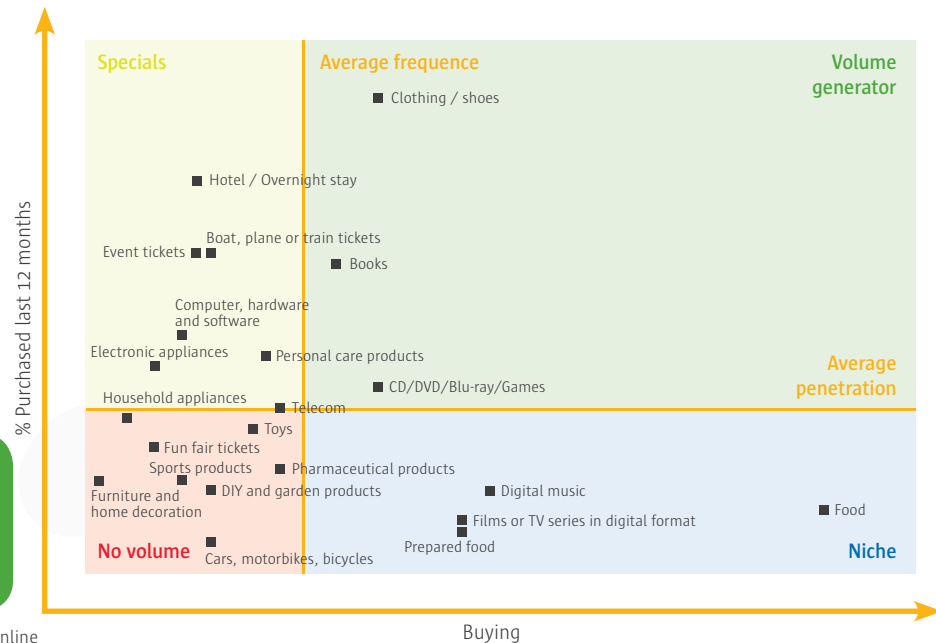
Food is the most important recurrent purchase



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.



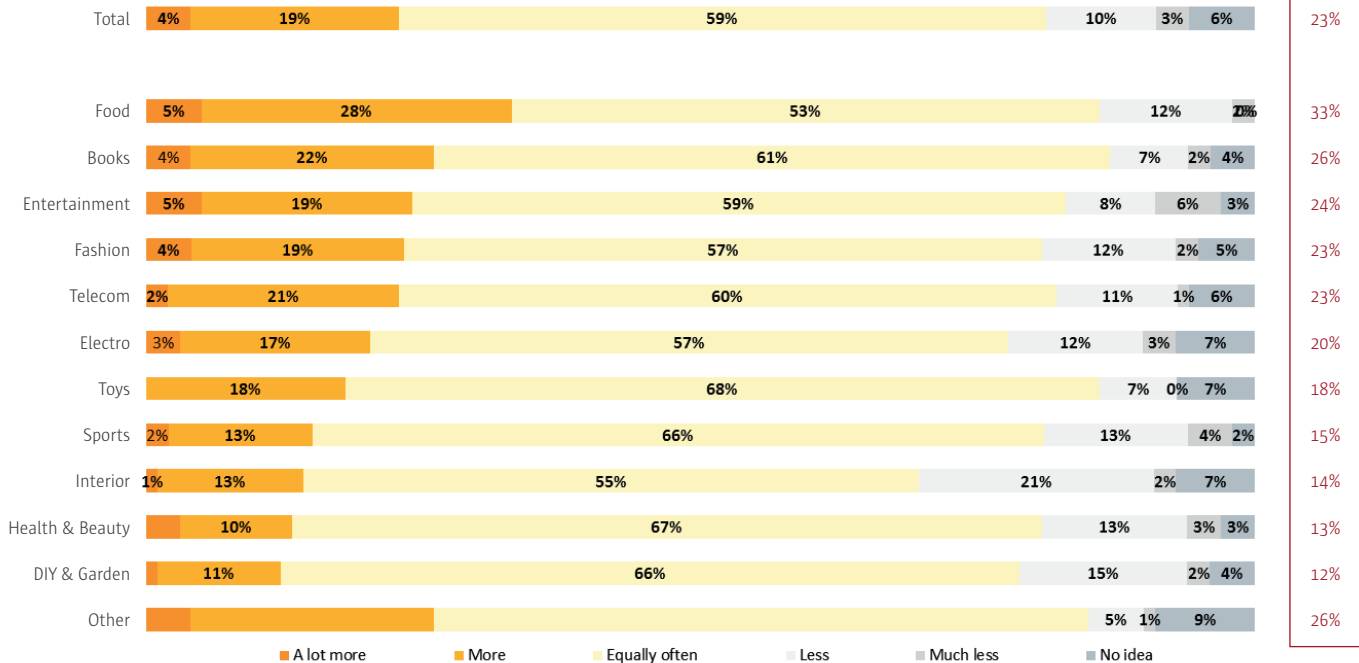
**Books and Clothing
& Shoes are the major
volume generators**

Online purchases

Future intention to buy

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

Top 2 score



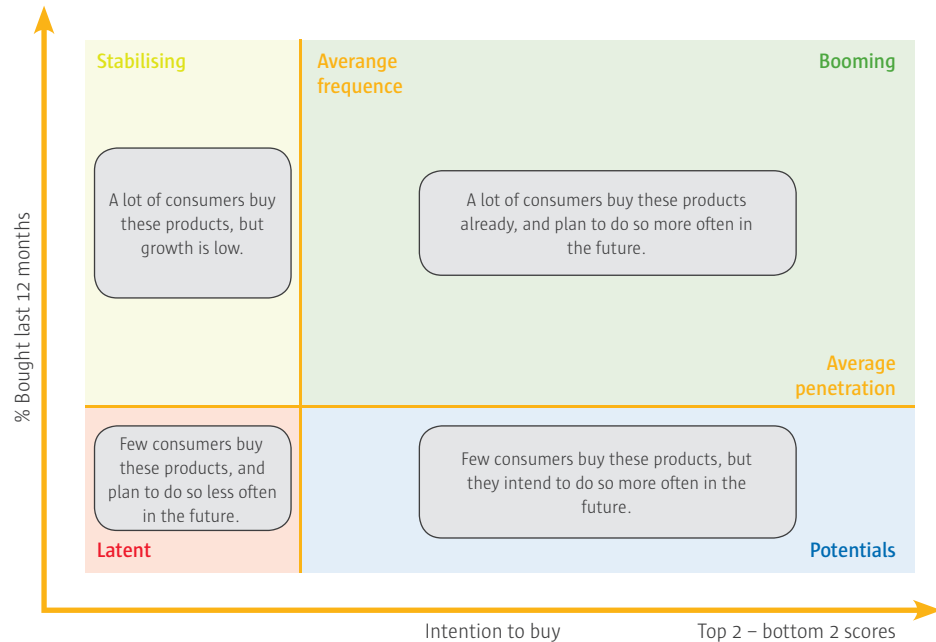
N = min 44 (Toys) / F = if purchased online

Online purchases

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?

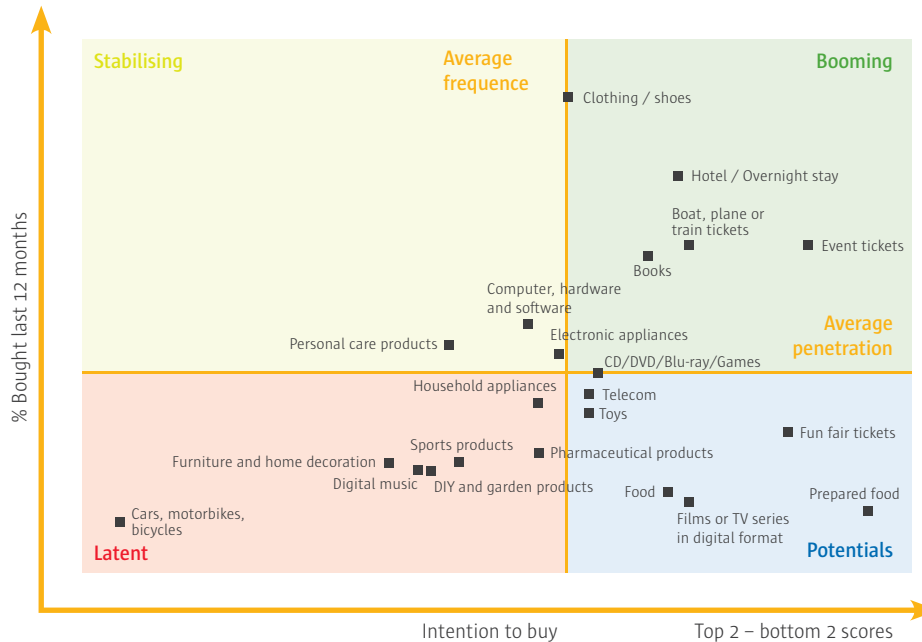


Online purchases

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?



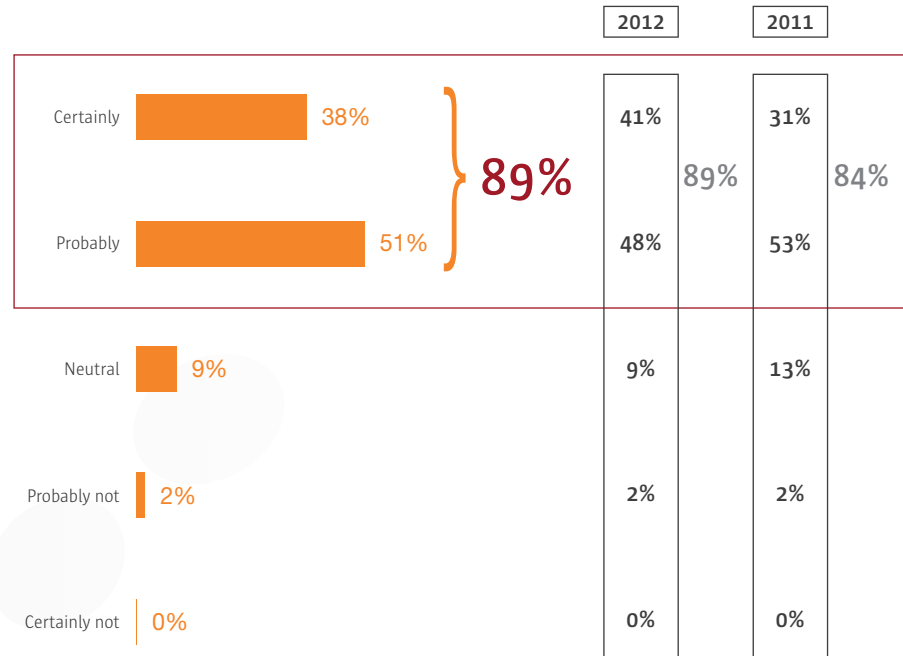
Telecom, Toys and Fun fair tickets are high potentials

N = min 33 (cars, motorbikes/bikes) / F = if purchased online

Online purchases

Future intention to buy

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

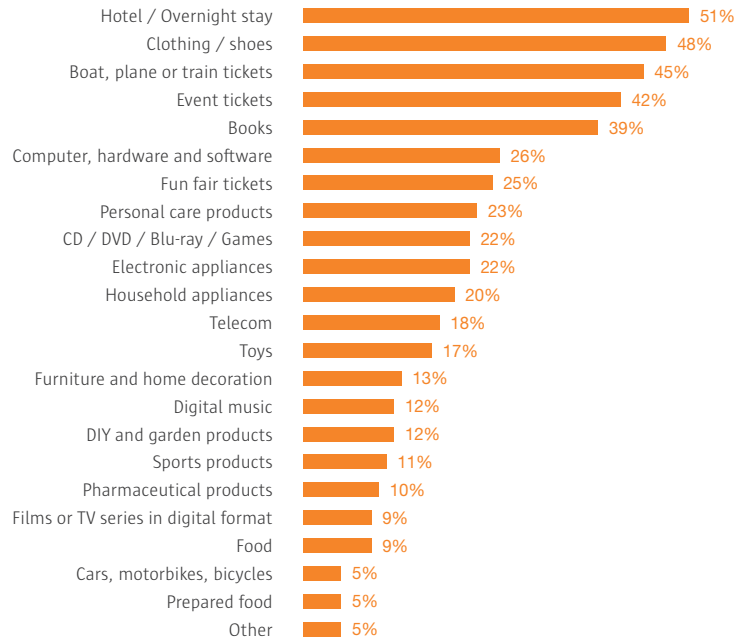


Online buyers remain loyal to e-commerce

Online purchases

Intention to buy next 12 months

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

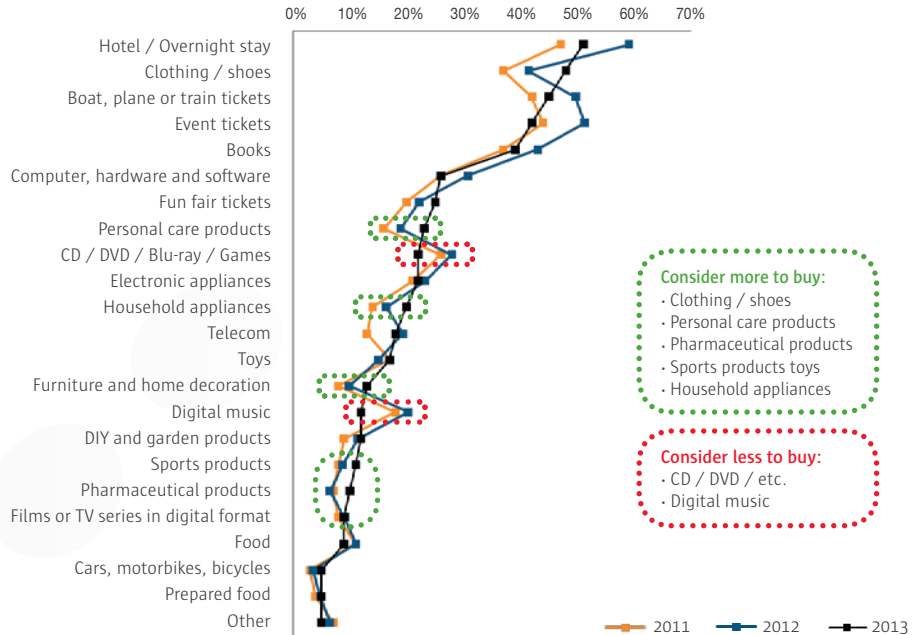


It can be expected that clothing/shoes will become even more popular in the future

Online purchases

Intention to buy next 12 months - Evolution

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



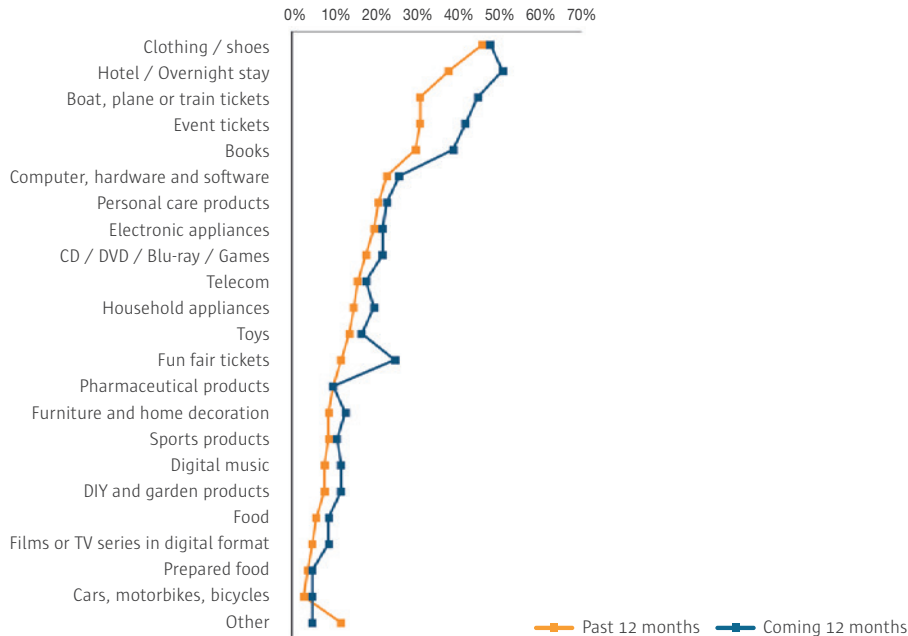
CD/DVD and digital music less considered

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 = 1062 / F = None

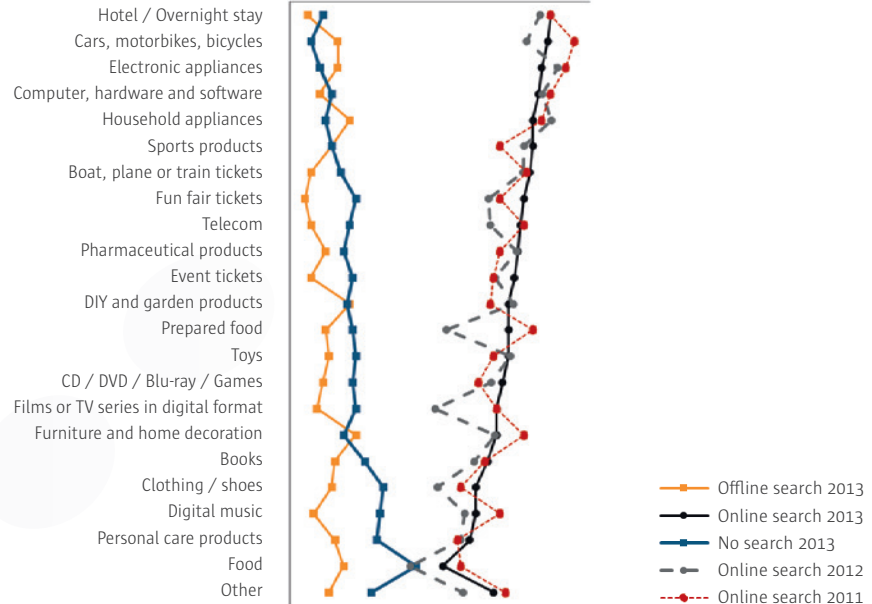
Online shoppers
don't change their
behaviour

Online purchases

Information search

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

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%




People keep looking for information online, even when they don't purchase the item



Sector focus





Price has become the most important motivator for online shoppers

... but not for all sectors.

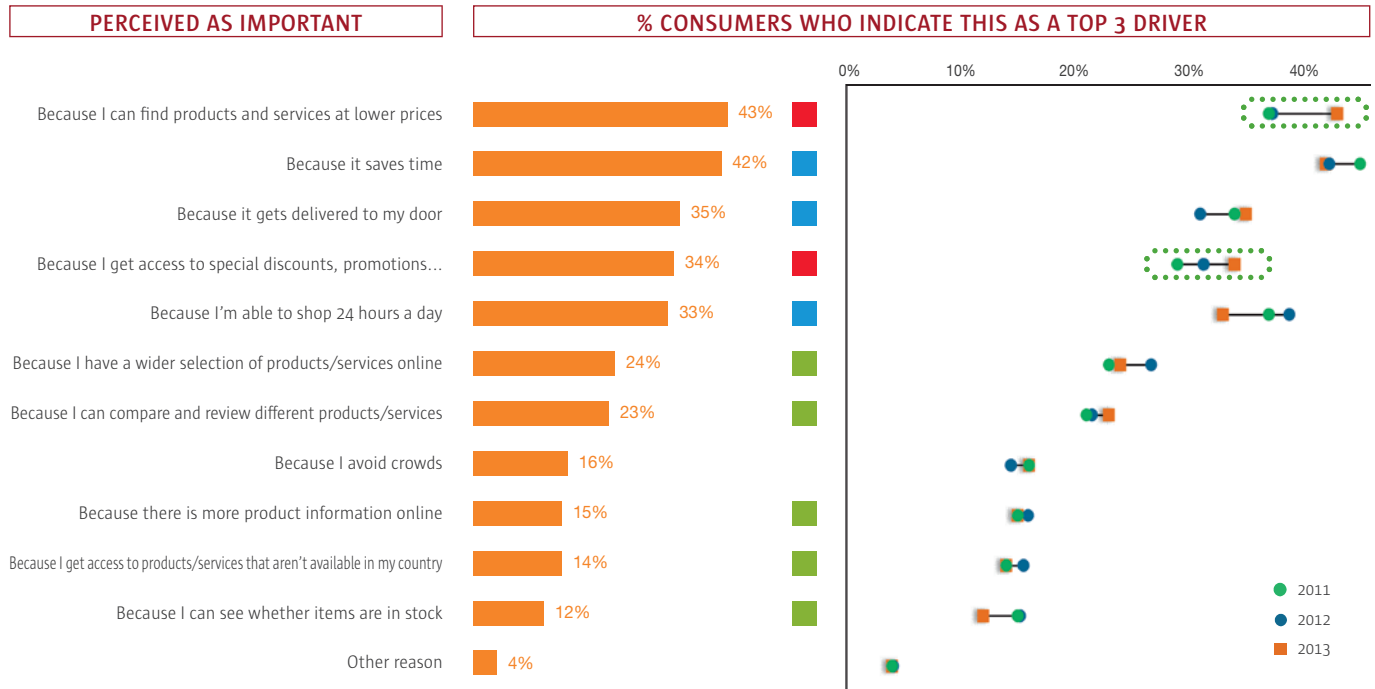
For **Food**, the **24/7 availability** and **time-saving** are the main drivers.

Sector focus

Drivers for E-commerce - Evolutions

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

- Time & Convenience
- Money
- Purchase Management



F = Have bought before

Sector focus

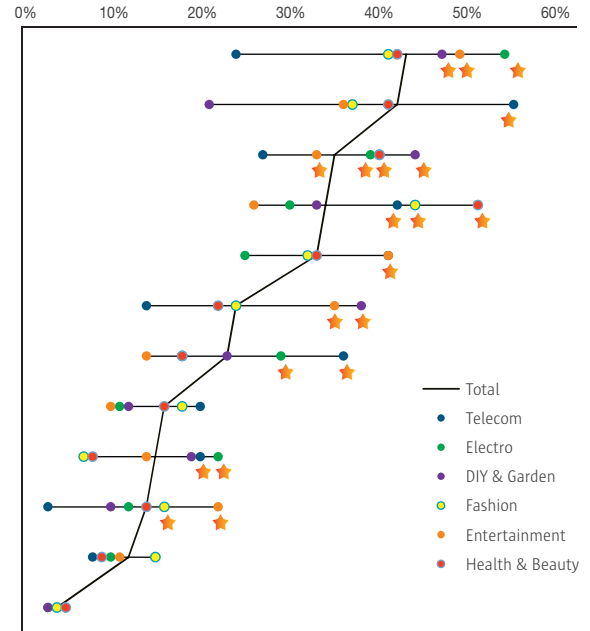
Drivers for E-commerce (details 1/2)

Electro & entertainment:
low prices become main drivers

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

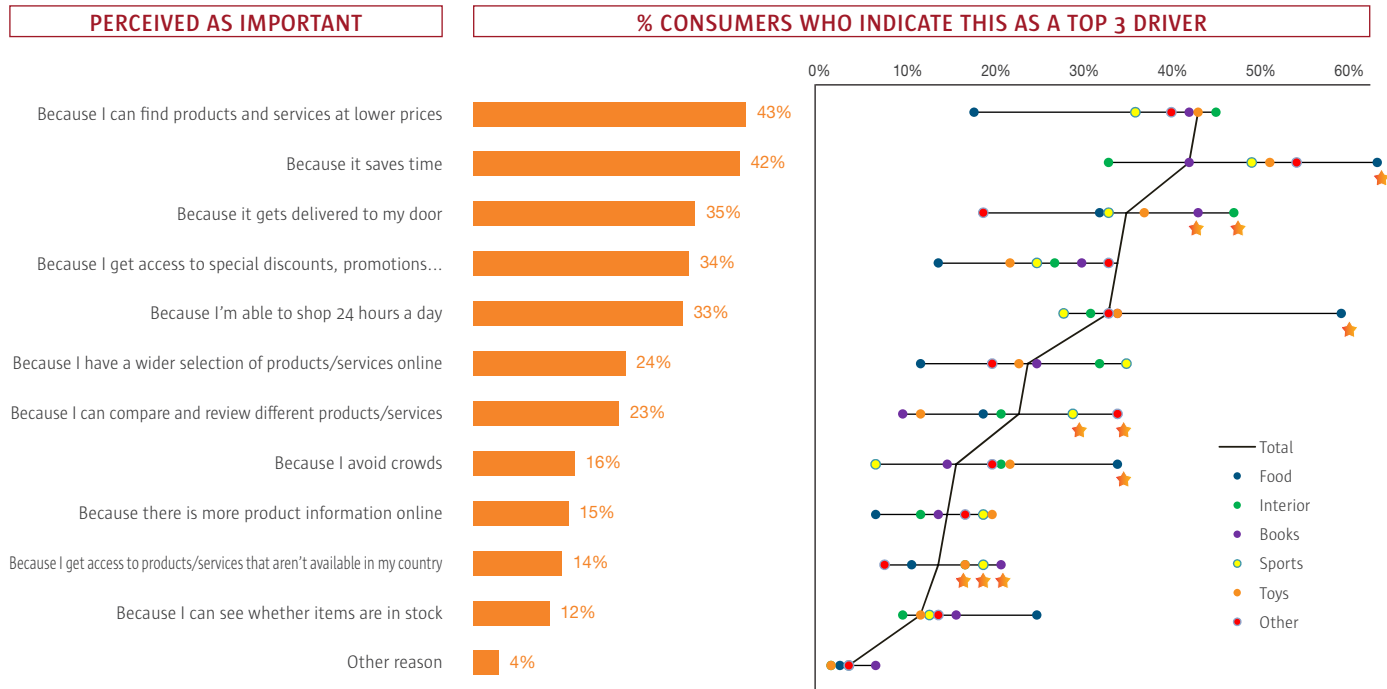


N = 41 up to 405 per sector / F = Have bought before

Sector focus

Drivers for E-commerce (details 2/2)

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



N = 41 up to 405 per sector / F = Have bought before

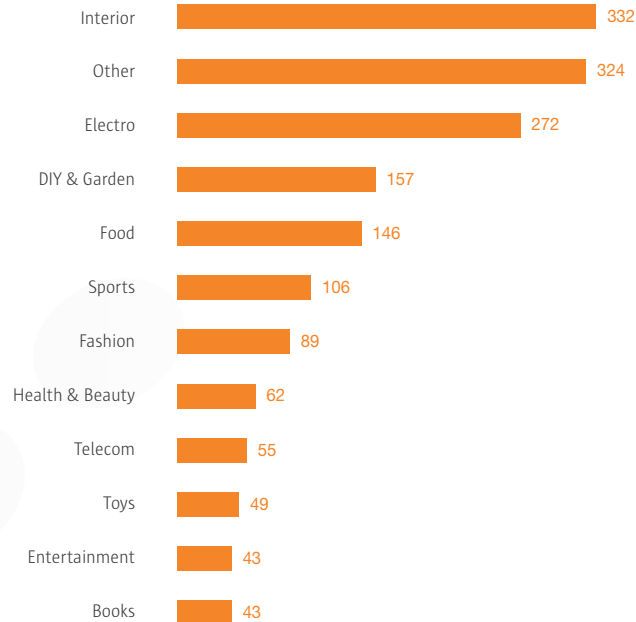
★ Sign. difference (95%)

Sector focus

Purchase amount

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

ON AVERAGE ONLINE SHOPPERS SPEND € 165 (PREVIOUS WAVE = € 187)



Highest spending for
Interior and Electro

N = 41 up to 405 per sector / F = Have bought before

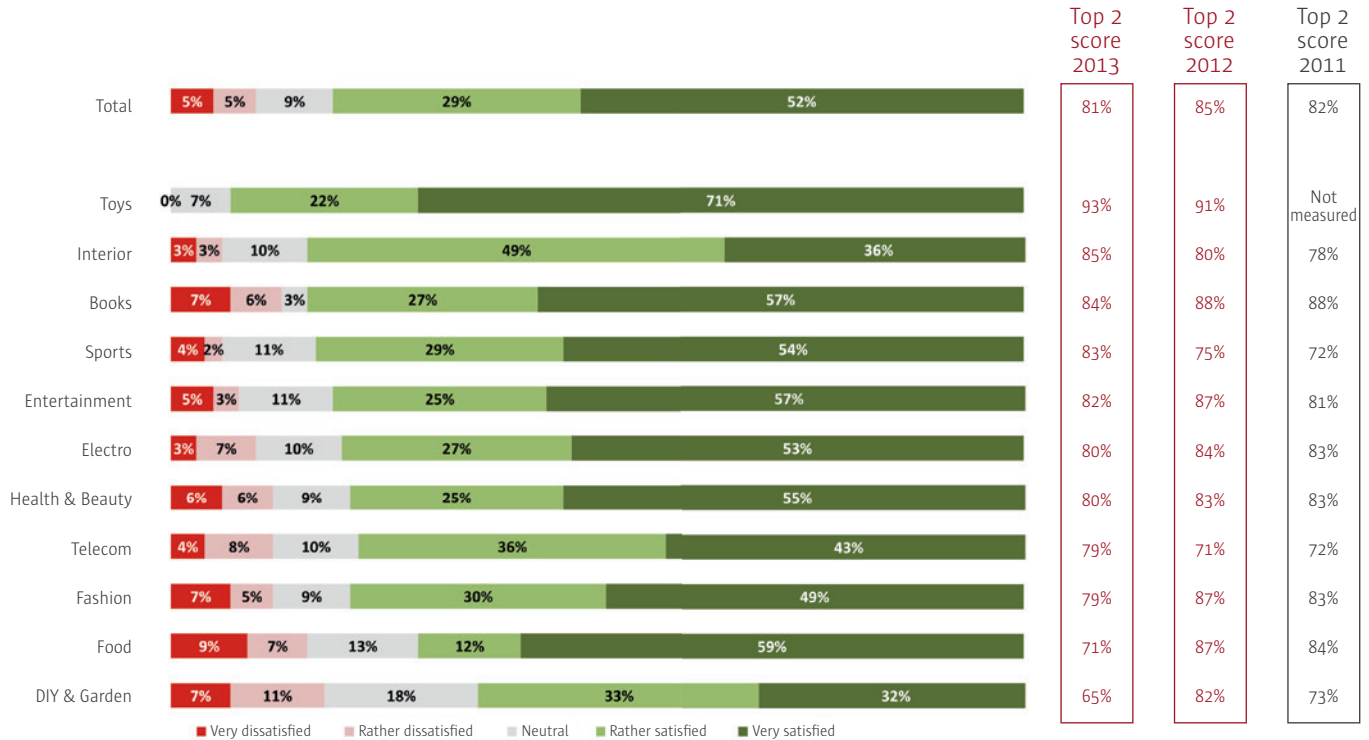
★ Sign. difference (95%)

Sector focus

Website satisfaction

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

Customers become less satisfied with online shops. Biggest drops in satisfaction for Food, Fashion, Entertainment and DIY & Garden

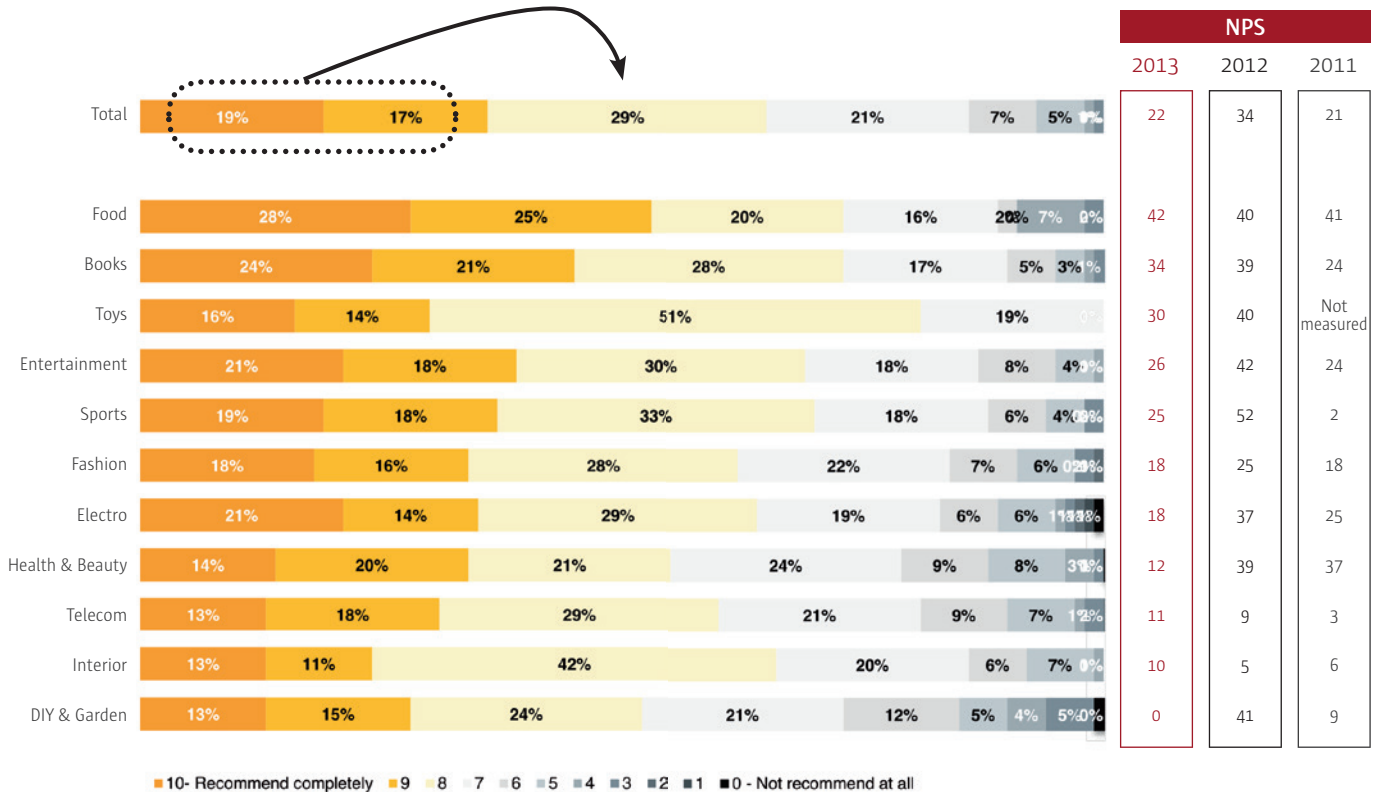


N = 41 up to 405 per sector / F = Have bought before

Sector focus

Website Recommendation

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



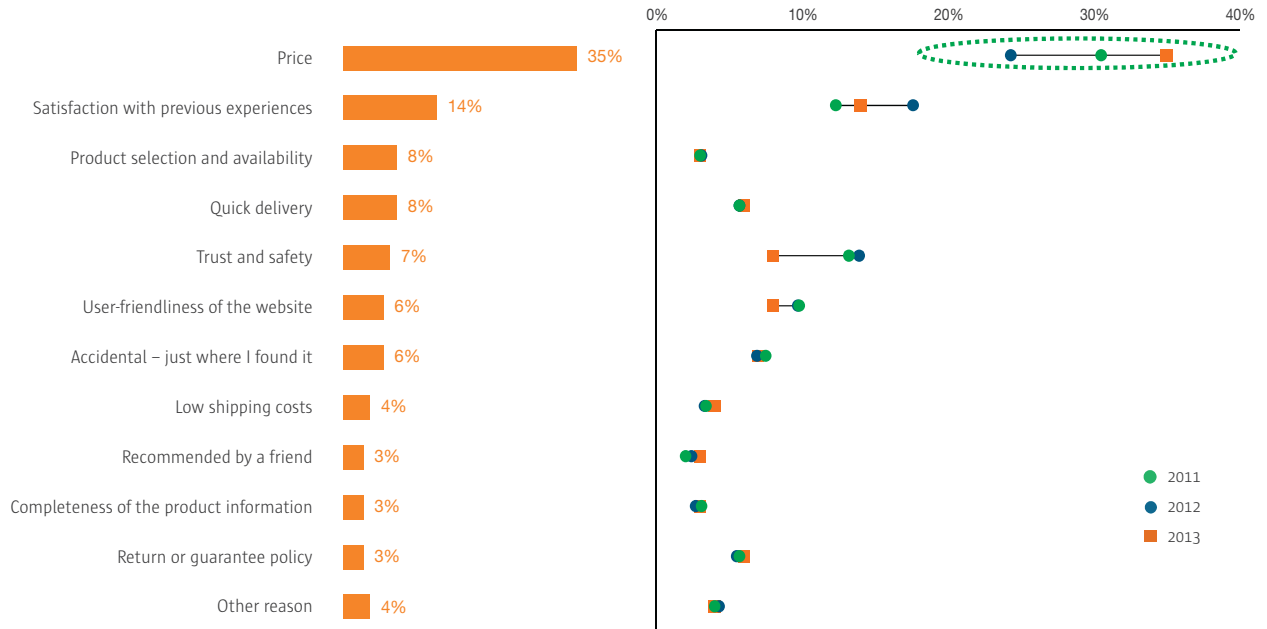
Sector focus

Drivers website - Evolutions

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

PERCEIVED AS IMPORTANT IN THEIR EXPERIENCE

% CONSUMERS WHO INDICATE THIS AS A TOP 3 DRIVER



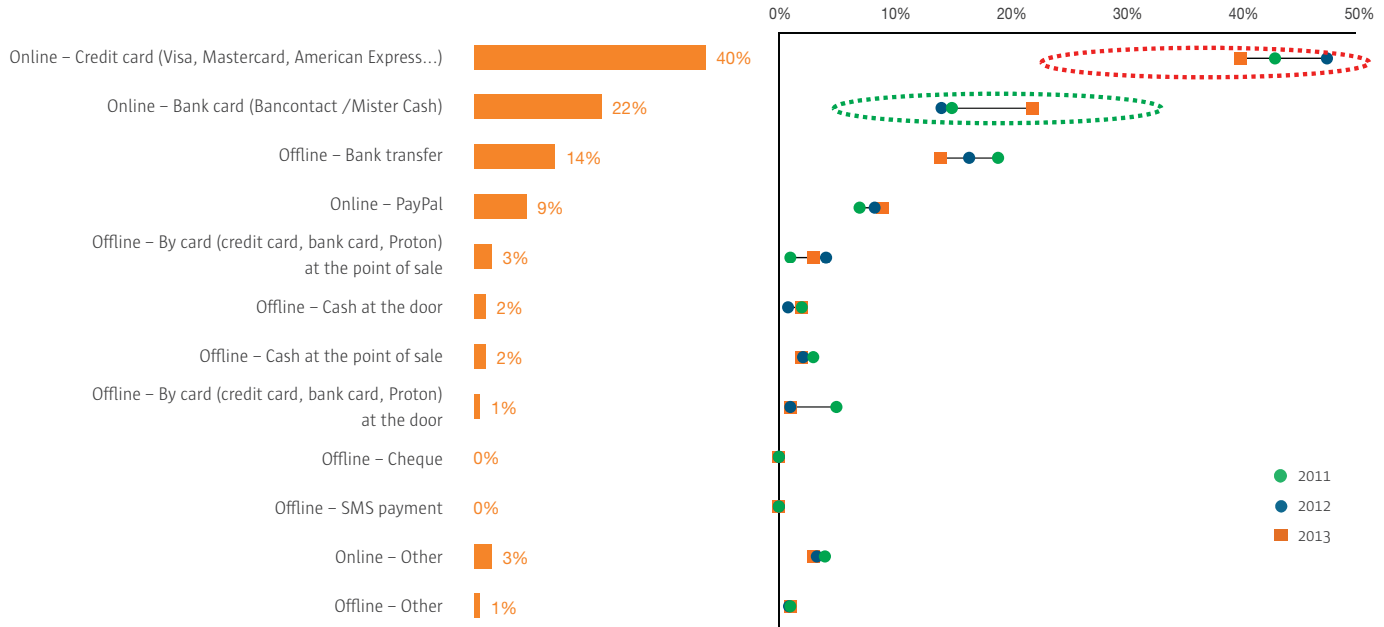
Sector focus

Payment method - Evolutions

Q: How did you pay for it?

Credit cards still most popular payment – but it loses importance to Bank cards

TRANSACTION PAYMENT METHOD



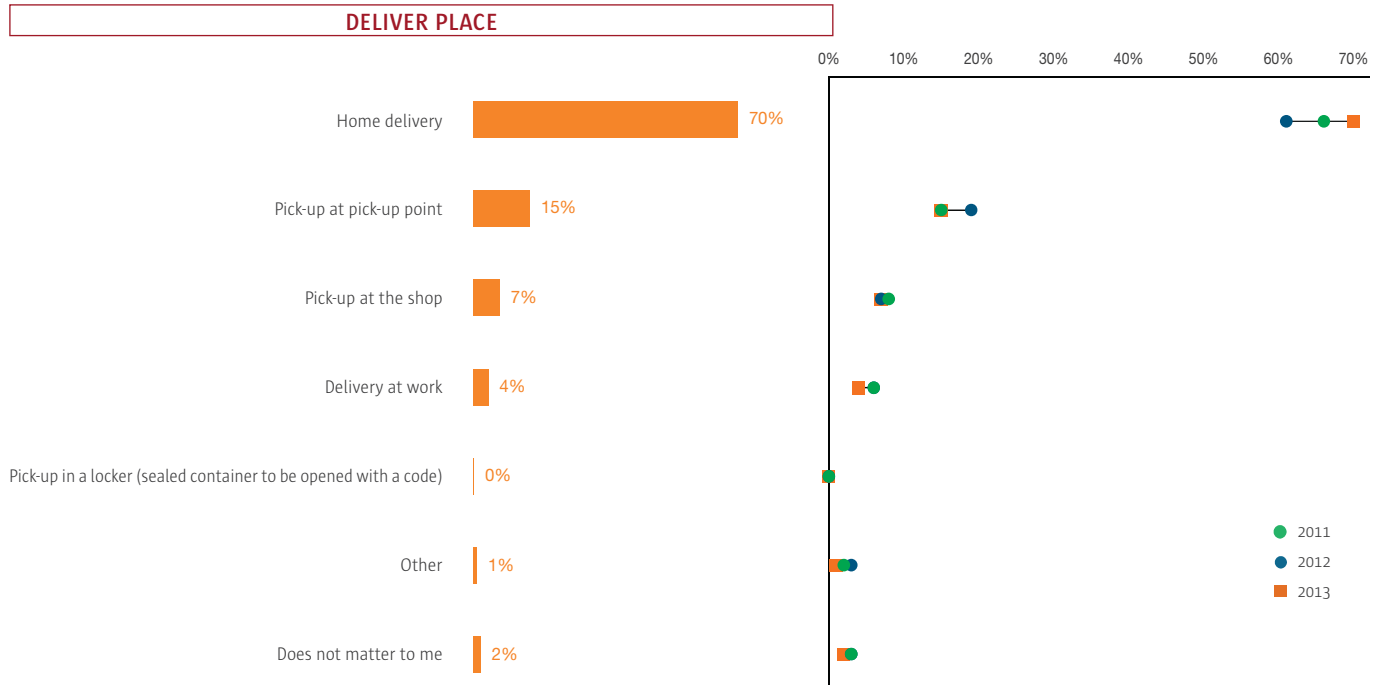
N = 41 up to 405 per sector / F = Have bought before

Sector focus

Delivery preference - Evolutions

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

70 % of customers want home delivery



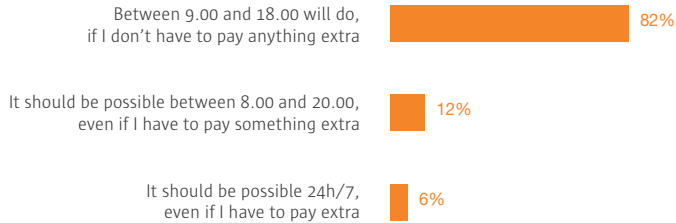
Sector focus

Delivery time - Evolutions

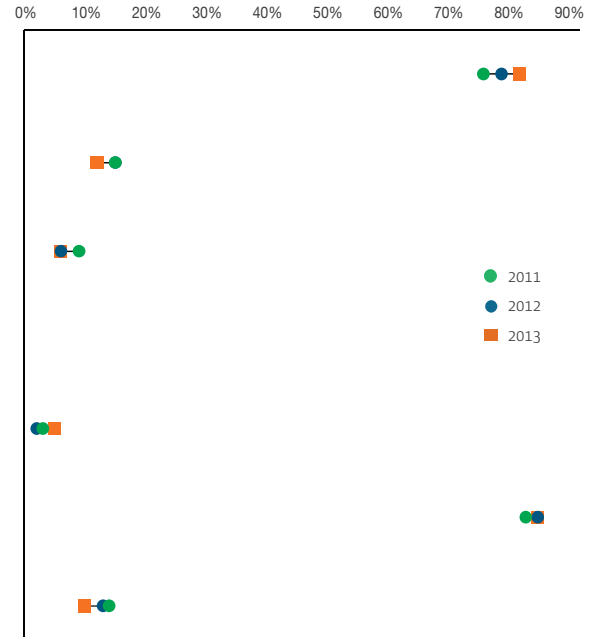
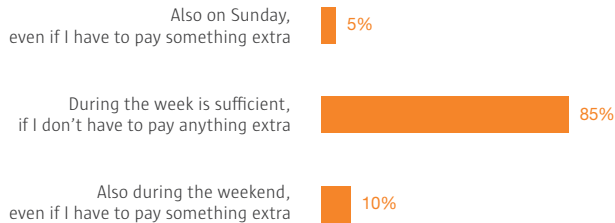
... and they don't want to pay for delivery convenience

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

HOUR



DAYS OF THE WEEK



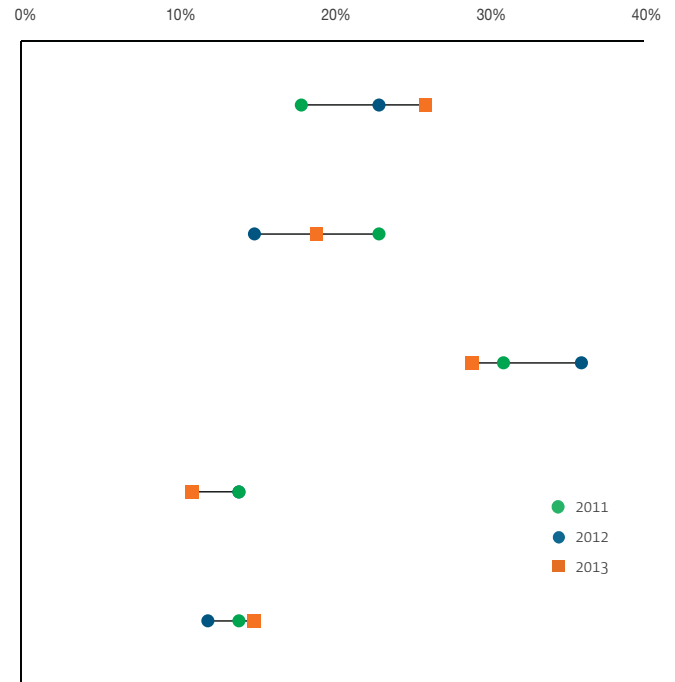
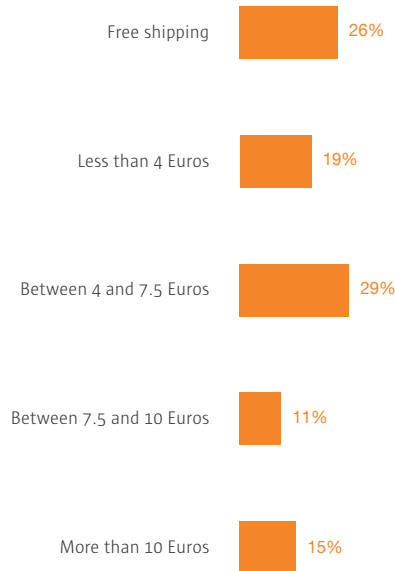
Sector focus

Delivery price - Evolutions

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

1 out of 4 expects free delivery

COST OF DELIVERY




N = 41 up to 405 per sector/ F = Have bought before

The background features a vertical gradient from dark purple on the left to a bright pink on the right. Several overlapping, semi-transparent circles in various shades of purple and pink are scattered across the upper and middle portions of the frame. The text is centered in the upper half of the image.

E-commerce trust & attitude





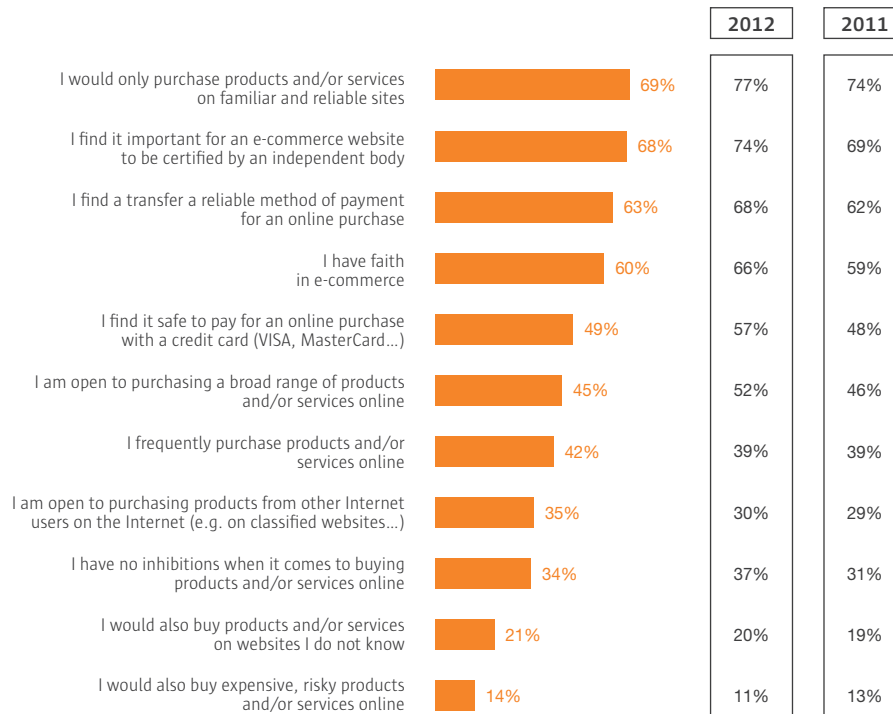
Trust might become an issue: **60%** has
faith in **e-commerce**, that is a **6%** drop.

Consumers prefer Belgian websites

‘they know’.

E-commerce trust

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

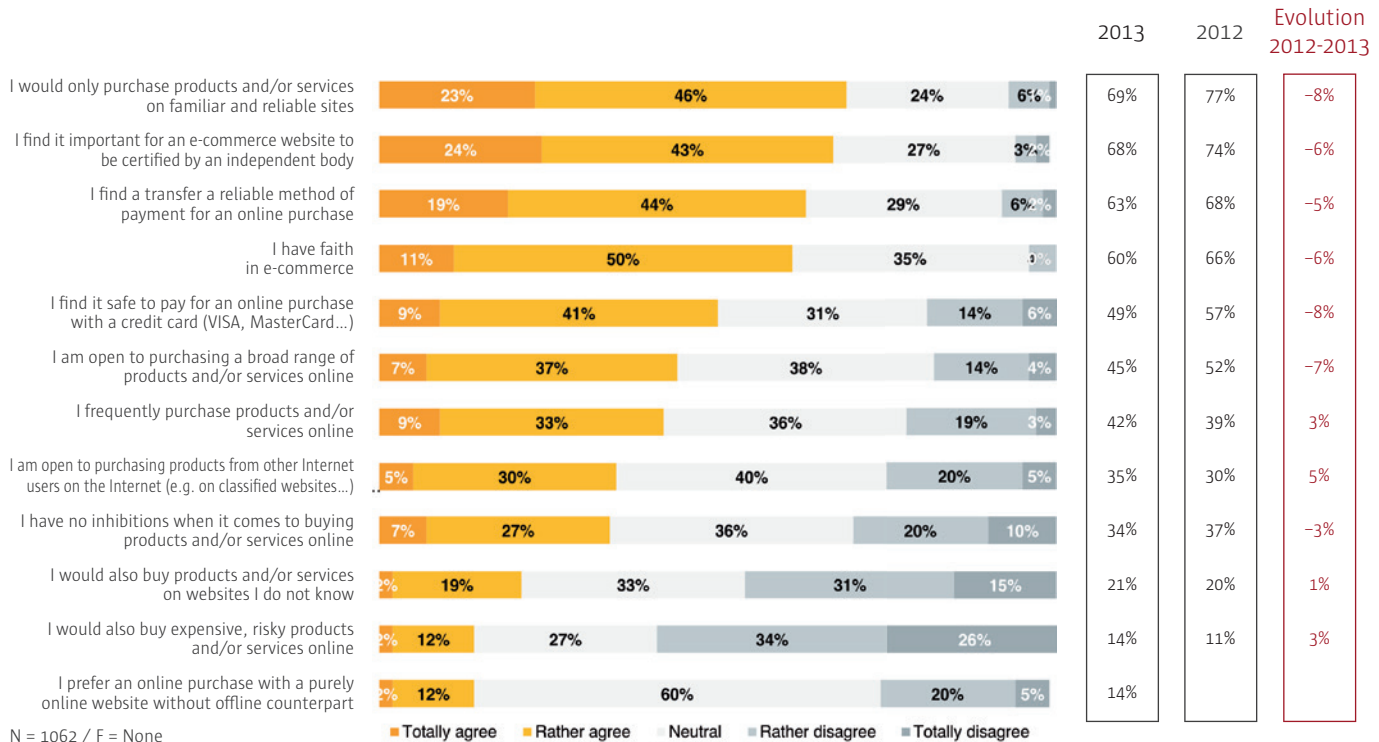


N = 1062 / F = None

Faith in e-commerce decreases by 6%; trust in credit card payment by 8%

E-commerce trust (detail)

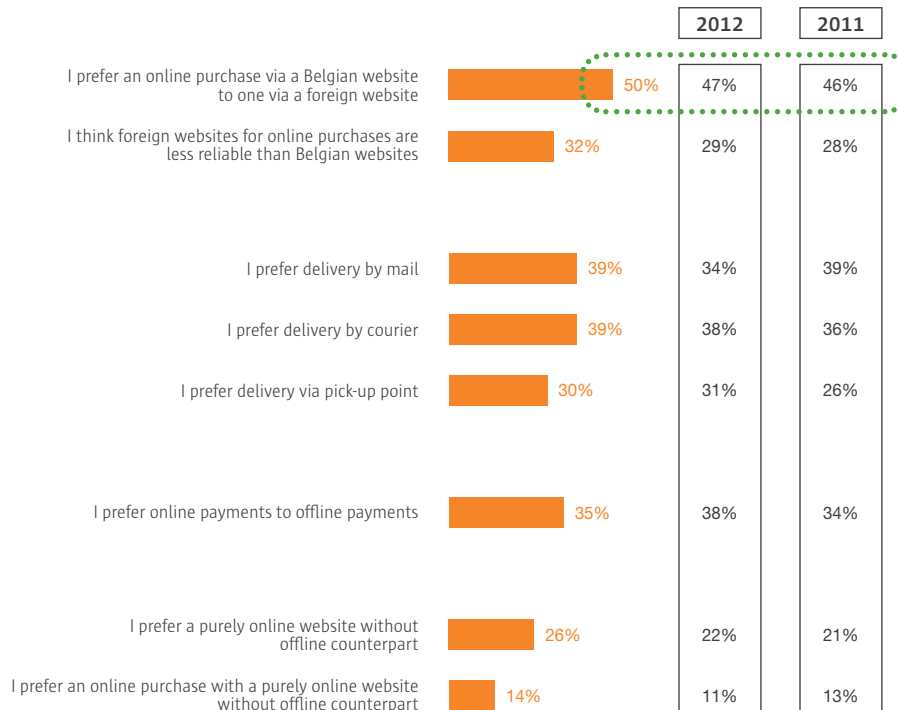
Q: To what extent do you agree with the following statements? (Top 2 scores)



N = 1062 / F = None

E-commerce attitude

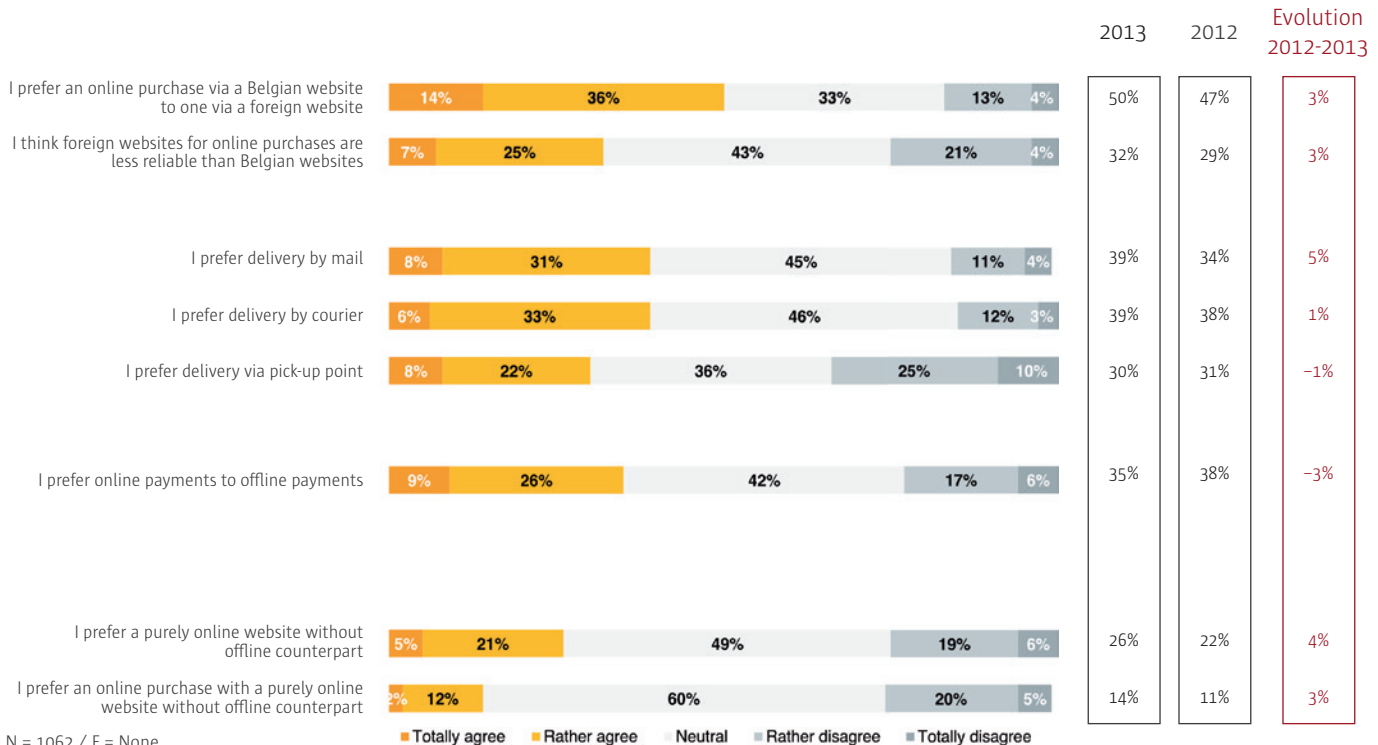
Q: To what extent do you agree with the following statements? (Top 2 scores)



50% of online consumers prefer Belgian websites

E-commerce attitude (detail)

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




N = 1062 / F = None

The background is a solid dark blue color. It features several overlapping, semi-transparent circles in a lighter shade of blue. The bottom edge of the image is a smooth, white, wavy curve that separates the blue area from a white area below.

Internet fraud

comeos 
for commerce and services



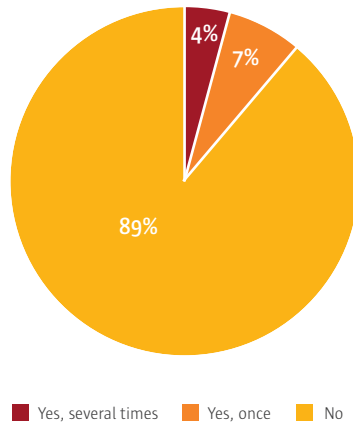
11% has been exposed to **internet fraud**.

Internet fraud

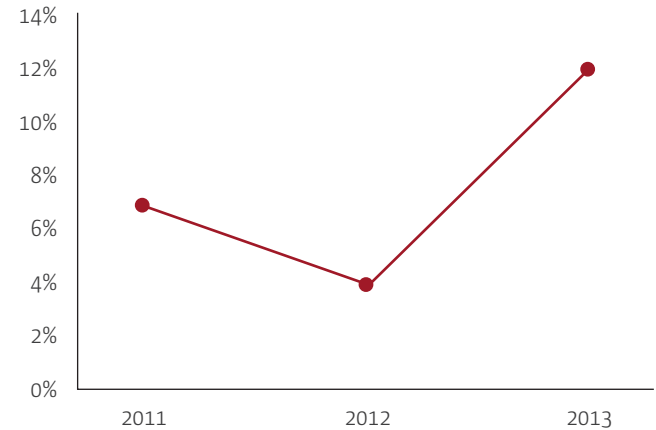
Exposure

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?

2013



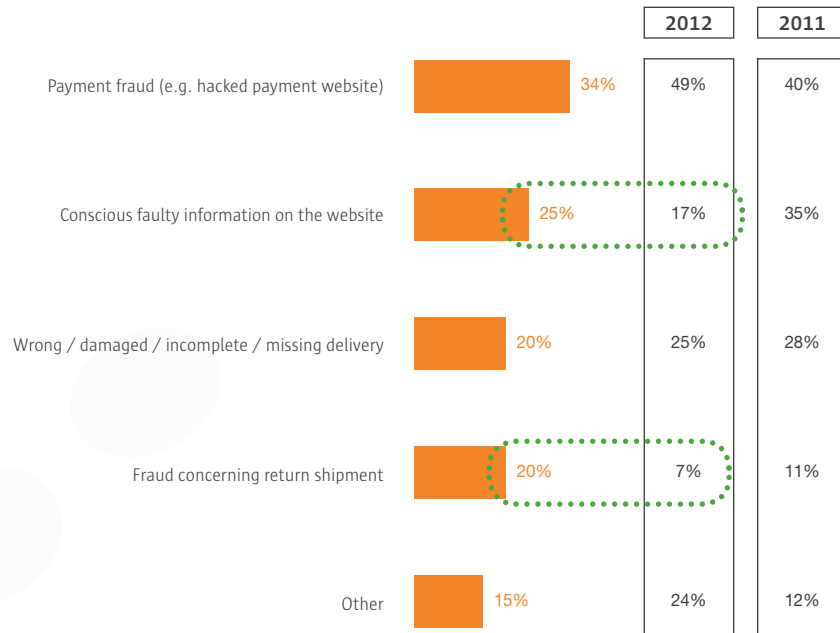
EVOLUTION



Internet fraud

Type of fraud

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

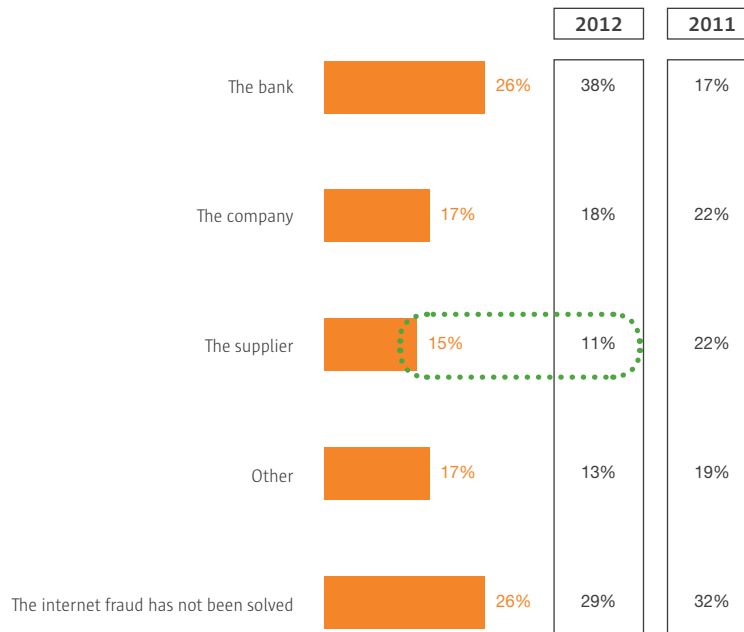


Main issues are: misleading information on the website and 'fraud' concerning return shipments

Internet fraud

Fraud handling

Q: Who solved this internet fraud?



The background is a solid green color with several overlapping, semi-transparent circles in a lighter shade of green. The circles are scattered across the upper and middle portions of the frame. The text is centered in the upper half of the image.

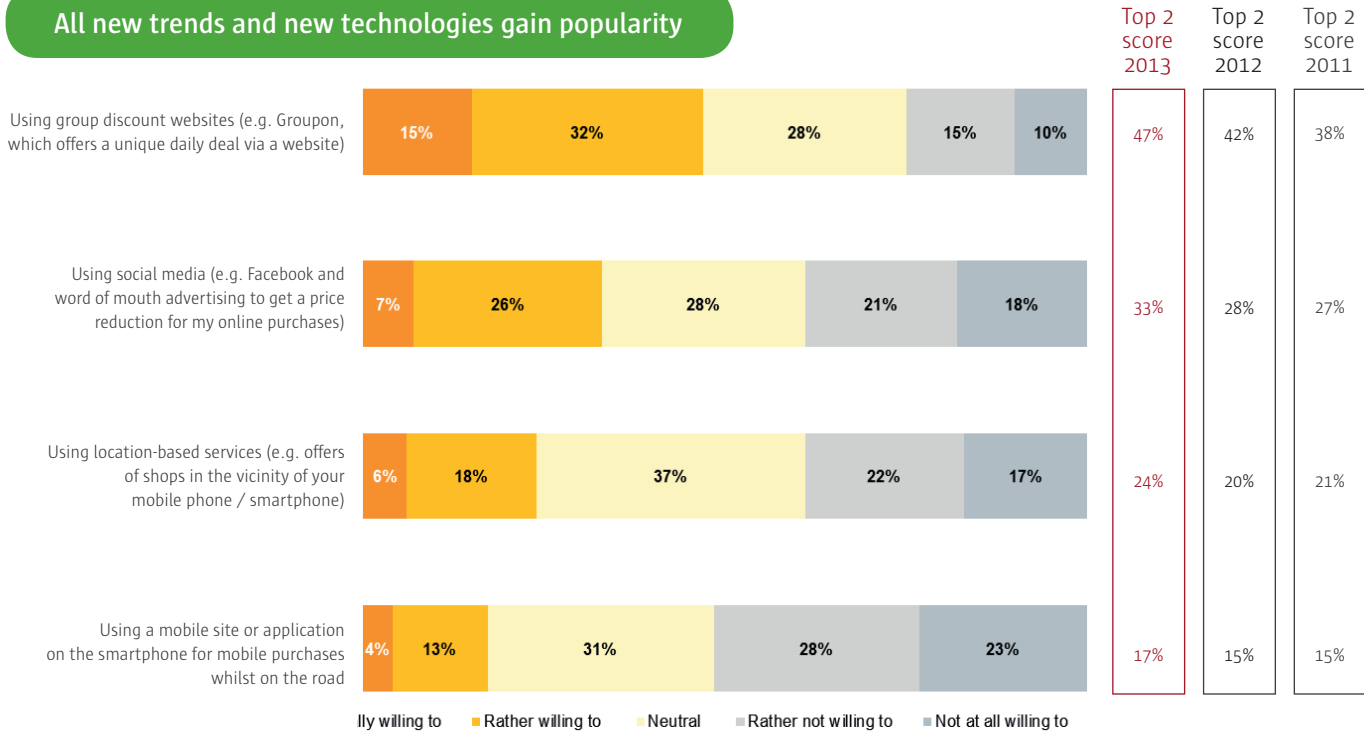
E-commerce trends & attitude



E-commerce trends & attitude

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

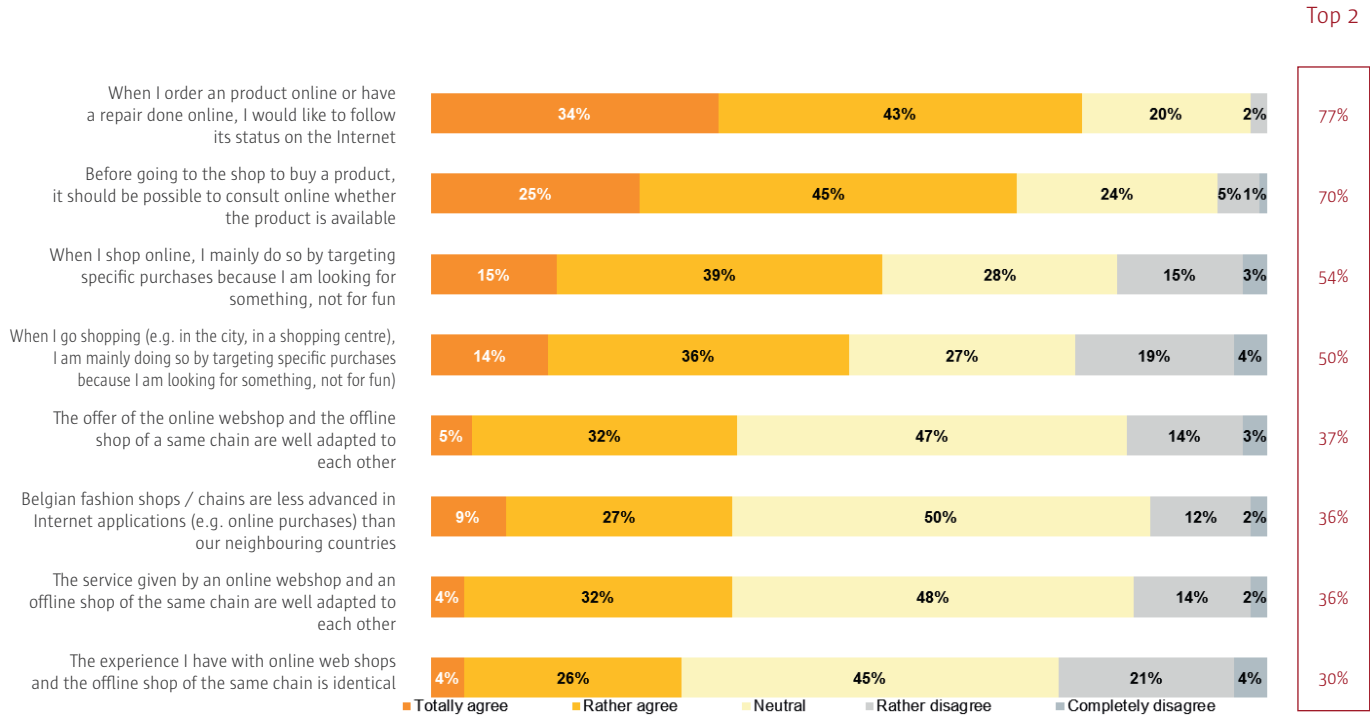
All new trends and new technologies gain popularity



E-commerce trends & attitude

Customers want access to back-office to check availability and tracking

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





www.comeos.be

