E-commerce Belgium 2019

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InSites Consulting

Introduction

Consumers are more and more aware of the impact of e-commerce on the environment and are considering doing something about it. An example? More than half of the Belgian online population is willing to wait longer for their package if the delivery can happen more ecologically.

How can we push e-commerce towards higher ecological standards? This is one of our challenges in the coming years.

Dominique Michel
CEO Comeos

Table of contents

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KEY FINDINGS

Key findings

- **7 out of 10 Belgians** bought something online last year, which is an increase of 17% compared to 5 years ago.

- **Rise of mobile devices for e-commerce** purchases
  - 58% of online buyers payed with mobile device.
  - 39% of those mobile payments are done with the Bancontact app.
  - The willingness to buy online via a mobile device reaches 58% of the online population, that’s an evolution of 15% compared to last year.

- **Strong trust in e-commerce**
  - Lack of trust in e-commerce decreased over the years and remains the same as last year (16%).
  - The barrier of sharing personal information dropped to 13%.

- **Gradual increase among convinced e-commerce shoppers**
  - 48% of online buyers buy at least monthly, an increase of 71% compared to 5 years ago.
  - The average number of subcategories bought increases form 4,7 items in 2018 to 5,4 items in 2019.
  - 45% of the online population spends more than € 150 per month, which is an increase of 36% compared to 5 years ago.

- **E-groceries**: 30% of the online population buys food online, which is an increase of 50% compared to last year.

- **More than 1 out of 2** online buyers order **after working hours**

Key findings

- **Fashion (61%), Travel (50%)** and **Leisure (49%)** still the favourite 3 categories.

- **Glasses and vehicles do not appeal the online buyer**
    - Among those who never purchased something online, **46%** would **never buy vehicles** while **42%** of them would **never buy glasses** online. However, among those who already purchased the category online, only 14% would never buy glasses (again). This is due to the need of seeing and trying it before purchasing (42%) and the fact the glasses can’t be fit to people’s face when ordering online (42%).

- **Decreasing returning rates**
    - The returning rate dropped from 89% in 2018 to **85% in 2019** showing the impact of retailers asking a reimbursement for sending products back.

- While price is still the main driver (22%) for website choice, **trust & safety in a certain website increased as driver (+2%).**

- **Home delivery (63%)** still the most important delivery method followed by an independent or in-store pick-up point (8%).

- **E-commerce trends**
    - **More and more consumers are aware of the impact of e-commerce** and are considering to do something about it. **55%** of the Belgian online population is **willing to wait longer** for their package if the delivery can happen **more ecologically**: a day later, another mode of transportation, etc.
    - **Rise of s-commerce** as 26% of the Belgian online population already bought something online via an ad they saw in their social media stream, e.g. Instagram, Facebook, Snapchat etc. or via online influencers (14%).

OBJECTIVES & METHODOLOGY

Objectives & Methodology

Background

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

Marketing objectives

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

Research questions

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

Method

Method: Online survey
Recruitment: Online research panel
Fieldwork period: 22/03-08/04
Interview length: 20 minutes
Country: Belgium

Sample

n = 2.062

Sample screening

Age: 15-70

Online purchases experience in last 12 months (both products / services)

Sample quota

Representative for Belgian population on gender, age, and region

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%

Notes

Period of fieldwork and sample composition are identical over the past years to optimize comparability.

In the report we refer to 'gross' sample. This sample is national representative (age, gender, region) for 15-70 yo, **before** screening on online purchases. This sample is only used to calculate penetration. The core of the report is the 'net sample', meaning the filter 'purchases online' is applied (not mentioned explicitly on the slide).

Since 2011 we measure e-commerce trends within Belgium. Given the strong growth of the sector, the questionnaire has been actualized over the years, while respecting the structure to safeguard comparability.

- Broadening scope: in 2018 we detailed 76 subcategories, and specified 15 main categories. In 2019 we defined 3 new main categories by splitting the category 'Travel & Leisure' into 2 categories and adding 'Glasses' to the mix. Furthermore the category 'Food' was expanded into 'Food & Drinks' by adding 3 subcategories (among them 'Pralines').
- Keep core structure, add relevant questions (e.g. offline penetration vs online penetration, adding statements) and remove old ones (e.g. impact on offline experience, etc.)

If a change in questionnaire had a noticeable impact on the results, it's explicitly mentioned in the report.


CARD
4585 8546 3272 7656

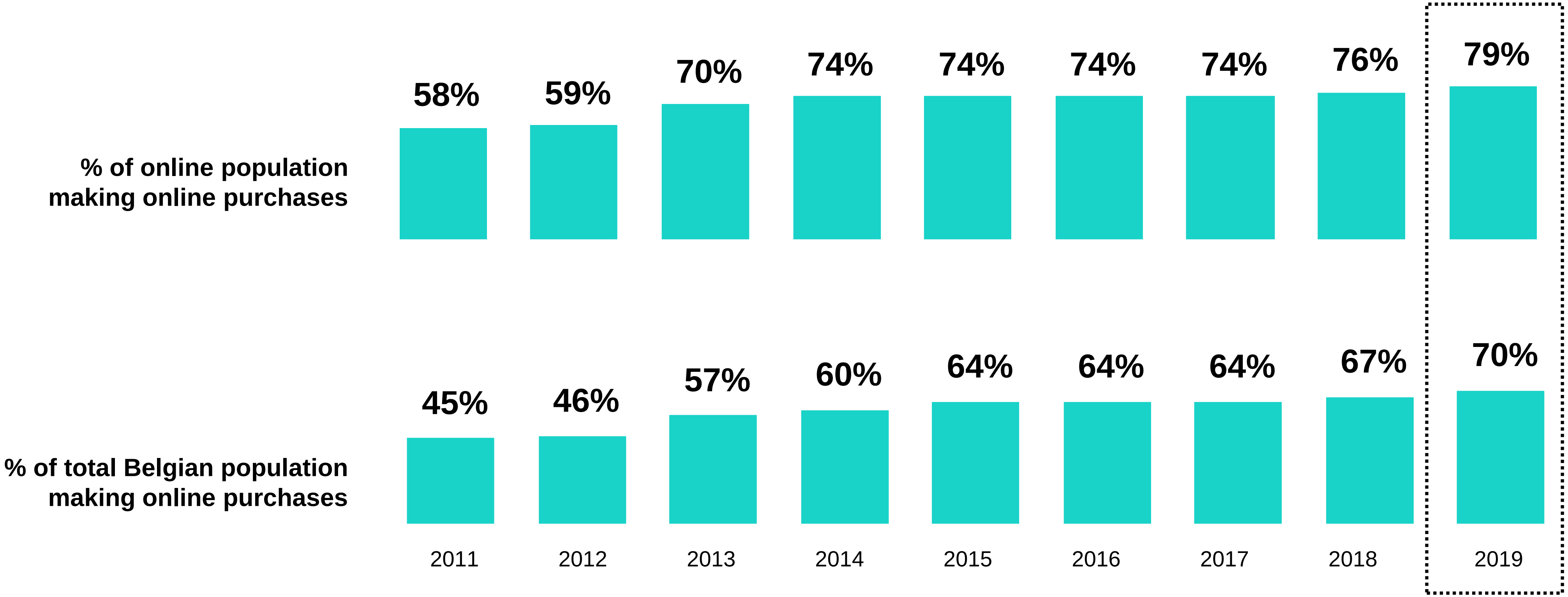
E-COMMERCE EXPERIENCE

E-commerce experience

Penetration last year

7 out of 10 Belgians buy online

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



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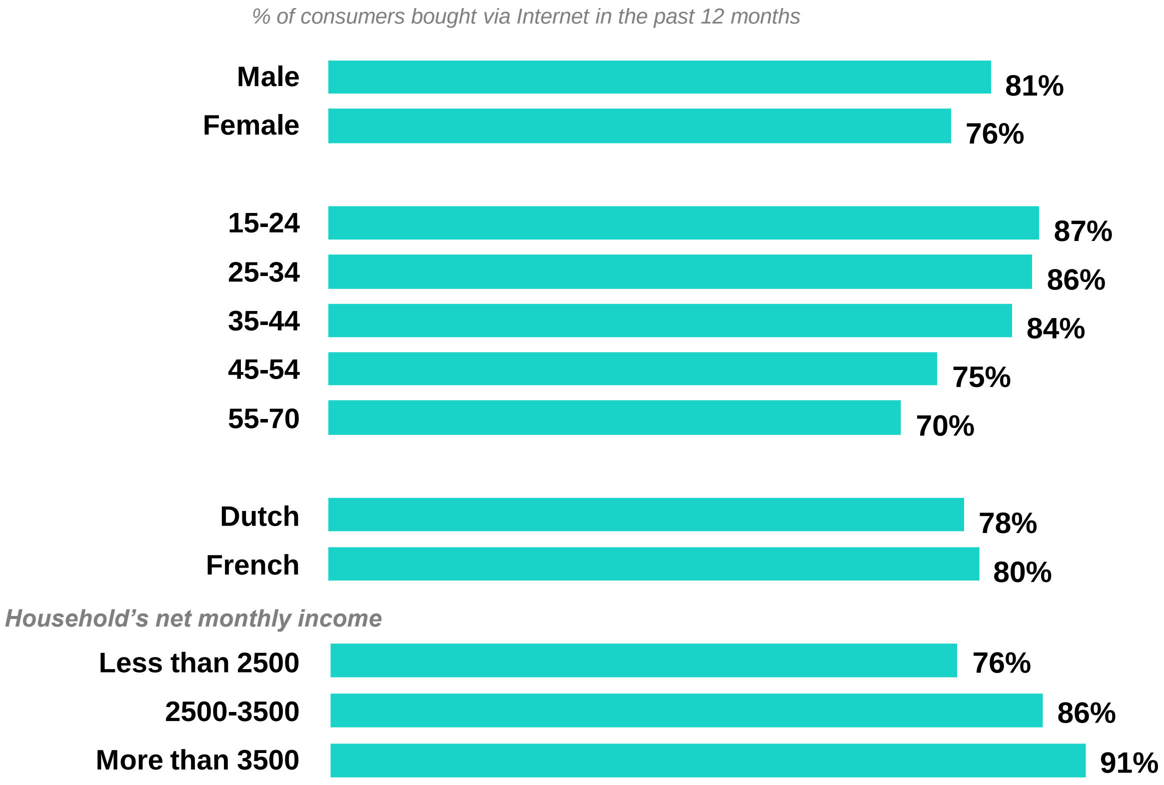
E-commerce experience

Penetration profile

Millennials: heaviest online buyers

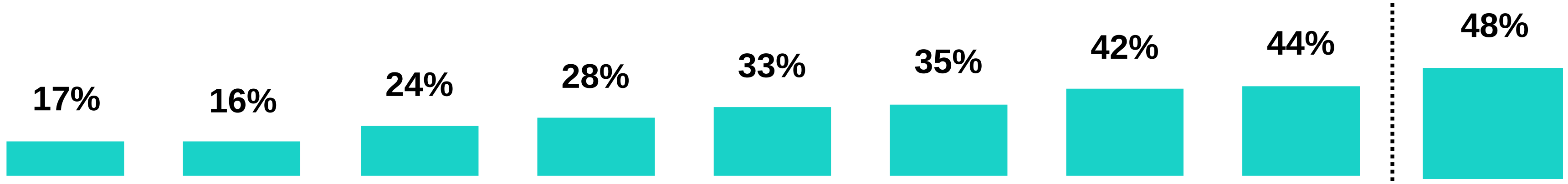


E-commerce experience

At least monthly purchases

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

1 out of 8 buys weekly



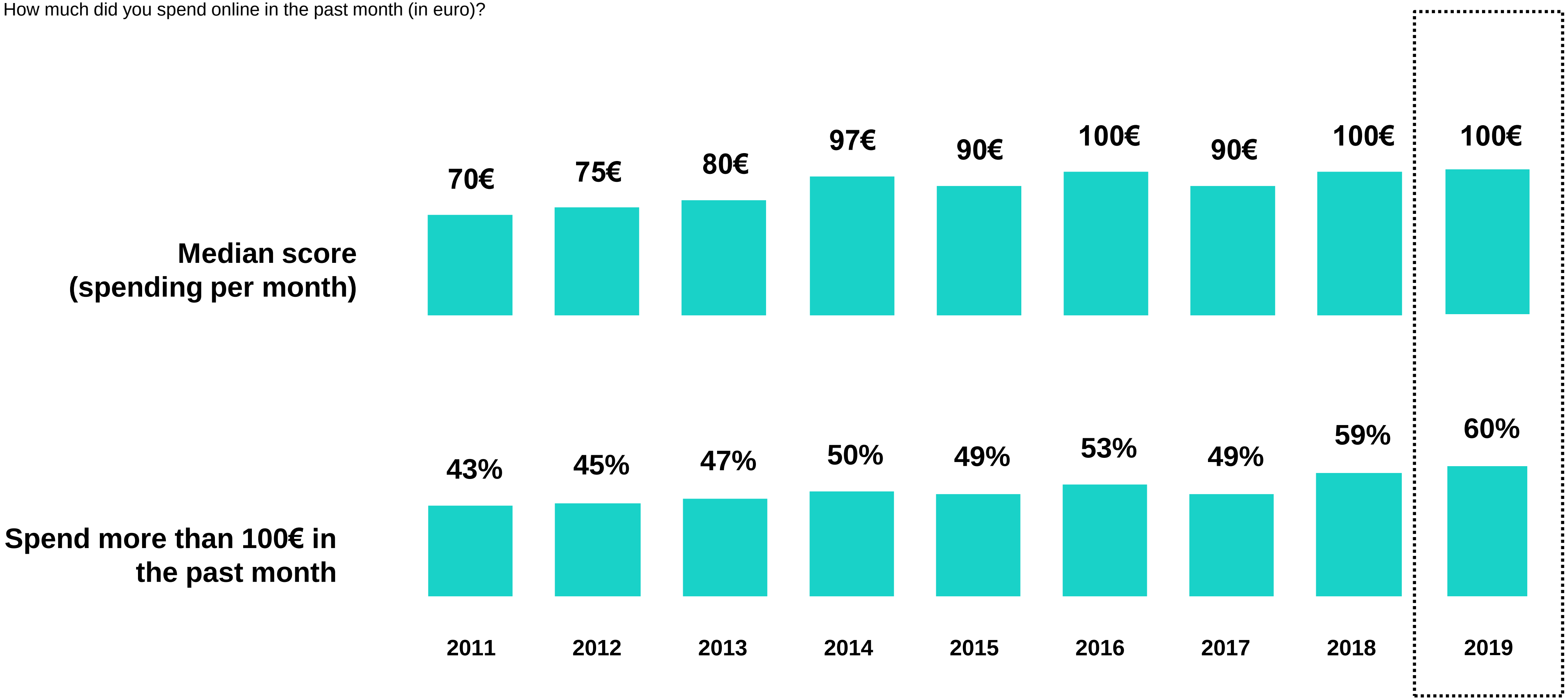
	2011	2012	2013	2014	2015	2016	2017	2018	2019
Weekly	2%	2%	4%	5%	6%	8%	7%	9%	**12%**
Monthly	15%	14%	20%	23%	27%	27%	35%	35%	**36%**
Every 1 to 3 months	31%	30%	30%	33%	31%	32%	29%	31%	**32%**
Every 3 to 6 months	22%	24%	23%	20%	18%	16%	16%	15%	**13%**
Every 6 to 12 months	20%	23%	18%	15%	14%	12%	10%	8%	**6%**
Less than 1 a year	10%	7%	6%	4%	5%	4%	3%	3%	**2%**

E-commerce experience

Current online shopping behavior

Stabilisation in budget spent

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

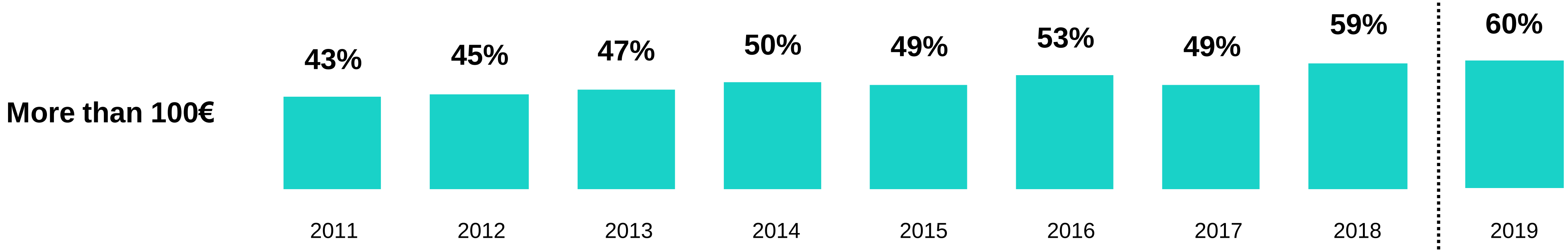


E-commerce experience

Current online shopping behavior

Online buyers not afraid of expensive purchases

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



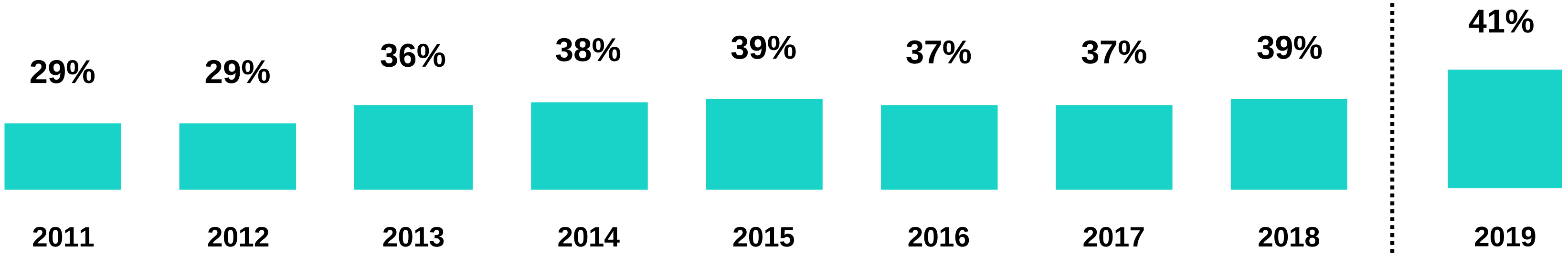
	2011	2012	2013	2014	2015	2016	2017	2018	2019
More than €150	30%	32%	35%	33%	31%	39%	34%	42%	**45%**
Between €100 & €149	13%	13%	12%	17%	18%	15%	15%	17%	**15%**
Between €50 & €99	22%	19%	20%	21%	23%	19%	20%	18%	**20%**
Between €20 & €49	16%	10%	17%	16%	14%	16%	13%	12%	**11%**
Less than €20	19%	26%	16%	13%	14%	12%	18%	10%	**8%**

E-commerce experience

Evolution budget – spend more

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

Self-declared spending behaviour increases



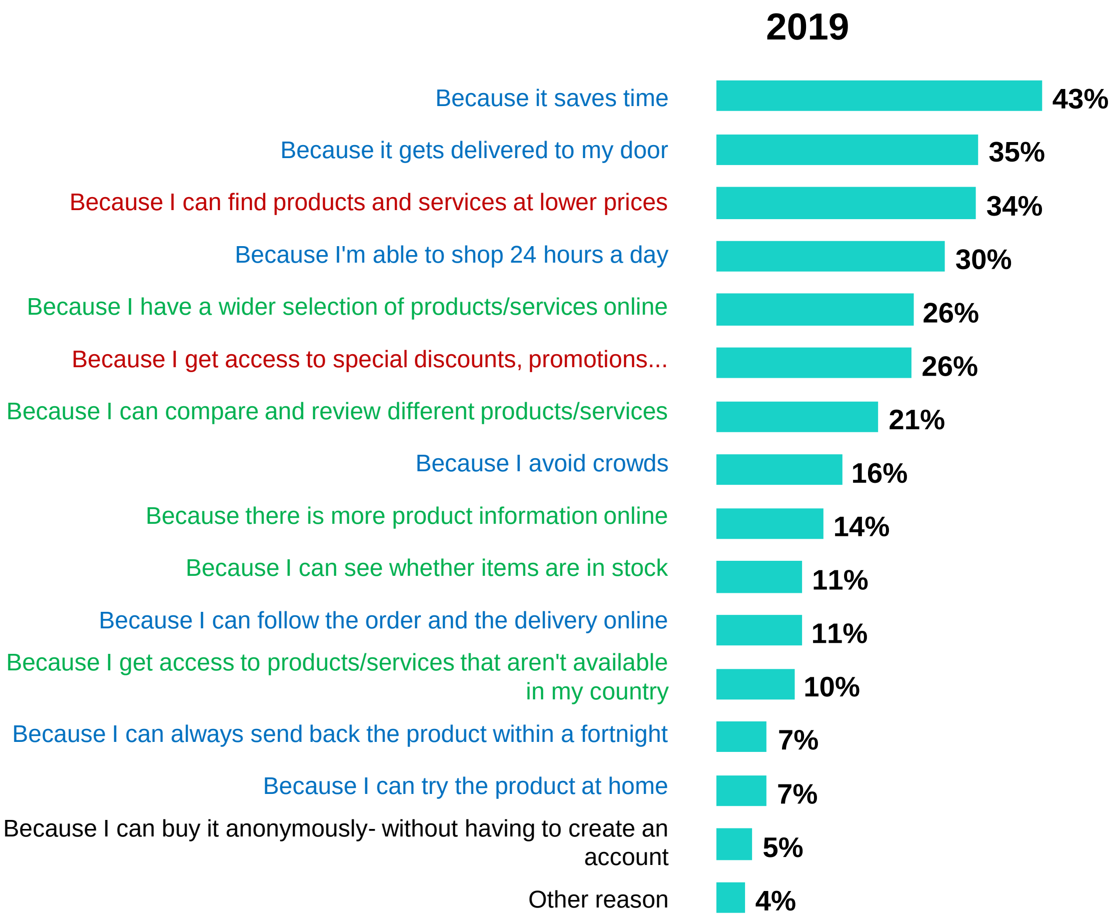
	2011	2012	2013	2014	2015	2016	2017	2018	2019
A lot more	3%	2%	4%	5%	5%	6%	4%	7%	**6%**
More	26%	27%	32%	33%	34%	31%	33%	32%	**35%**
Equally much	48%	49%	45%	44%	45%	46%	47%	44%	**44%**
Less	13%	13%	11%	12%	11%	11%	10%	11%	**10%**
A lot less	2%	3%	3%	2%	2%	2%	2%	2%	**2%**
No idea	8%	7%	5%	3%	3%	4%	3%	4%	**3%**

E-commerce experience

Drivers for E-commerce - Difference

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

Decreasing importance of money-related drivers



	2019	Difference 2019 - 2018	Difference 2019 - 2011
Because it saves time	43%	-1%	-2%
Because it gets delivered to my door	35%	-2%	+1%
Because I can find products and services at lower prices	34%	-2%	-3%
Because I'm able to shop 24 hours a day	30%	-4%	-7%
Because I have a wider selection of products/services online	26%	-1%	+3%
Because I get access to special discounts, promotions...	26%	-3%	-3%
Because I can compare and review different products/services	21%	-2%	0%
Because I avoid crowds	16%	-1%	0%
Because there is more product information online	14%	0%	-1%
Because I can see whether items are in stock	11%	-2%	-4%
Because I can follow the order and the delivery online	11%	N.A.	N.A.
Because I get access to products/services that aren't available in my country	10%	-3%	-4%
Because I can always send back the product within a fortnight	7%	-2%	N.A.
Because I can try the product at home	7%	N.A.	N.A.
Because I can buy it anonymously- without having to create an account	5%	N.A.	N.A.
Other reason	4%	-1%	0%

Time & Convenience

Money

Purchase Management

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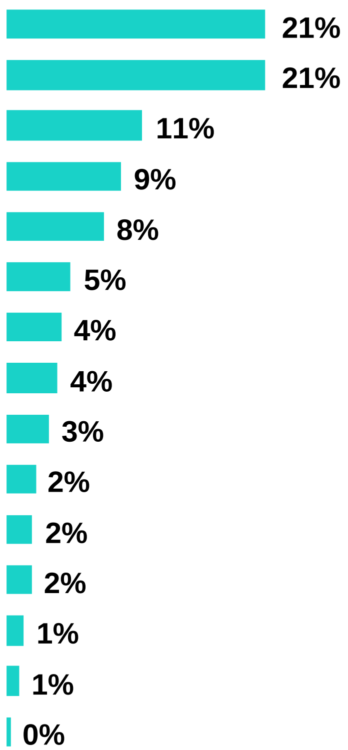
E-commerce experience

Ways of payments

Q: How did you pay for it?

Credit cards must make room for debit cards



	2019	Difference 2019 - 2018	Difference 2019 - 2011
Online – Credit card (Visa, MasterCard, American Express...)	21%	-3%	-22%
Online – Bank card (Bancontact/Mister Cash)	21%	-1%	+6%
Mobile app - Bancontact app	11%	+3%	N.A
Online – PayPal	9%	-1%	+2%
Mobile app - My bank's app	8%	+2%	N.A
Mobile app - PayPal	5%	+1%	N.A
Offline – Bank transfer	4%	0%	-15%
Offline – By card (credit card, bank card) at the point of sale	4%	0%	-1%
Mobile app - Credit card	3%	0%	N.A
Offline – Cash at the door	2%	0%	-1%
Offline – Cash at the point of sale	2%	-1%	0%
Offline – By card (credit card, bank card) at the door	2%	0%	+1%
Online – Other	1%	0%	-3%
Mobile app - Payconiq	1%	+1%	N.A
Offline – SMS payment	0%	0%	0%

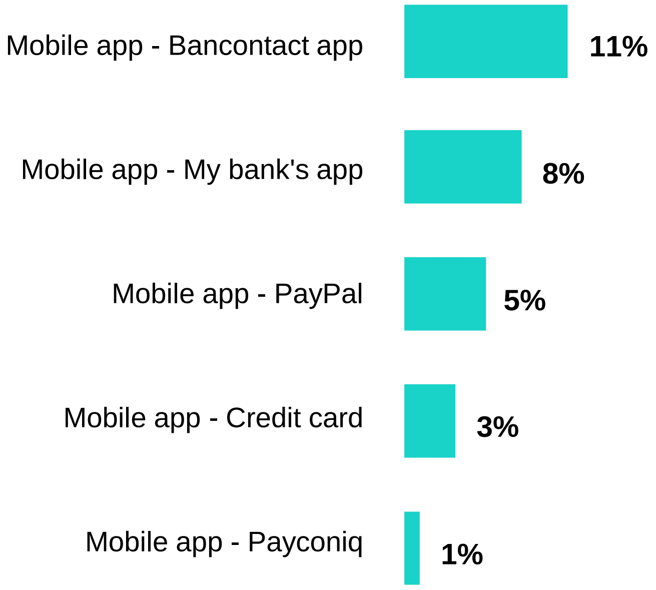
I don't know – 0,3%

E-commerce experience

Ways of payments – mobile payment method

Q: How did you pay for it?

<u>Note</u>: Bancontact app and Payconiq merged right before the survey was conducted in 2019. As the question was asked via a single response, 12% payed via the new app.



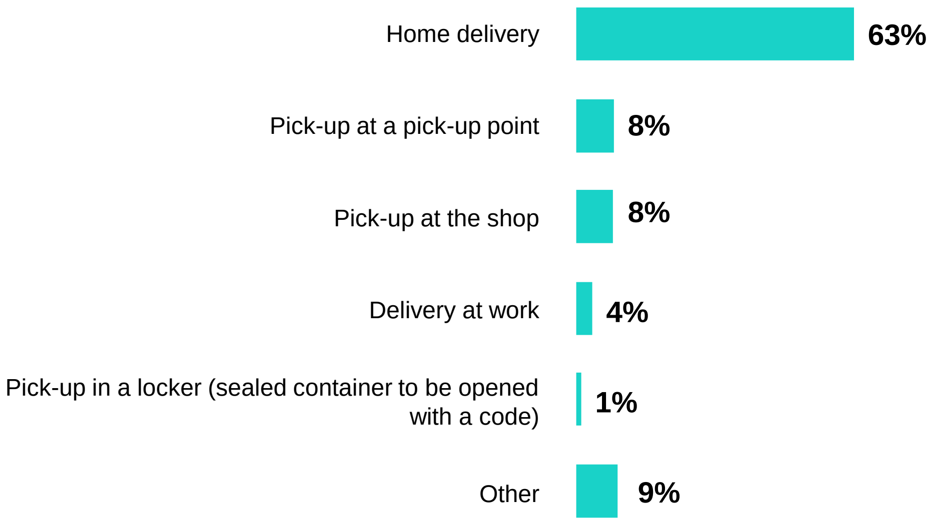
	2019	Difference 2019 - 2018	Difference 2019 - 2011
Mobile app - Bancontact app	11%	+3%	N.A.
Mobile app - My bank's app	8%	+2%	N.A.
Mobile app - PayPal	5%	+1%	N.A.
Mobile app - Credit card	3%	0%	N.A.
Mobile app - Payconiq	1%	+1%	N.A.

E-commerce experience

Delivery method - Difference

Q: How was <PRODUCT> delivered?

Pick-up in a locker remains marginal



	2019	Difference 2019 - 2018	Difference 2019 - 2011
Home delivery	63%	-2%	-3%
Pick-up at a pick-up point	8%	0%	-7%
Pick-up at the shop	8%	0%	0%
Delivery at work	4%	+1%	-2%
Pick-up in a locker (sealed container to be opened with a code)	1%	0%	+1%
Other	9%	0%	+7%

I do not remember – 6%

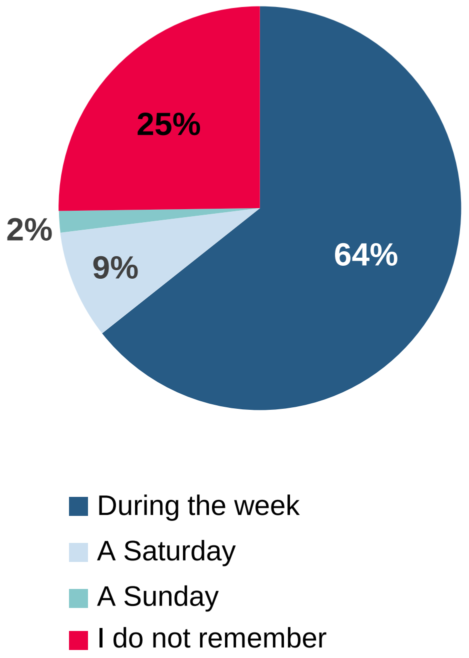
E-commerce experience

Delivery time / Time of purchase

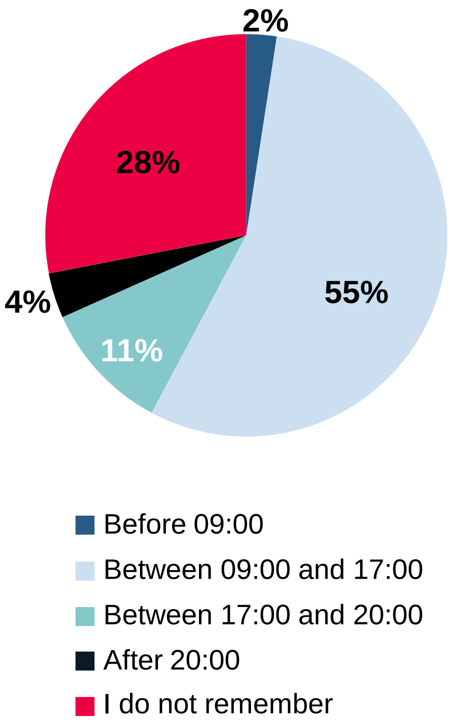
Q: What day was your online purchase delivered? / At what time was your online purchase delivered? / At what time of the day do you do your purchase?

More than half of purchases after working hours

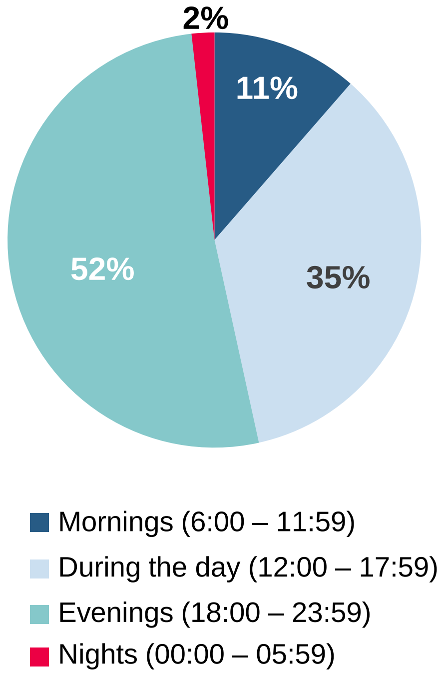
Day of delivery



Hour of delivery



Time of purchase

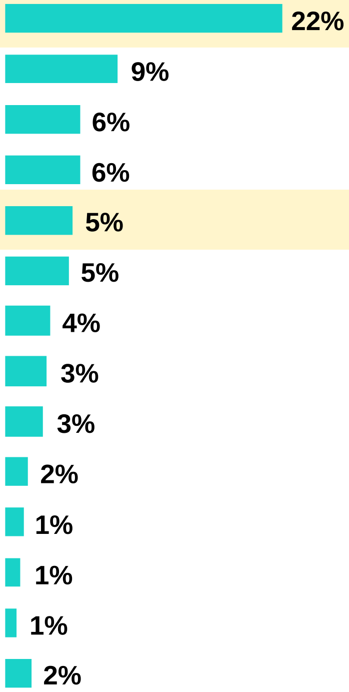


E-commerce experience

Website Drivers - Difference

Q: Why did you use <website> for your online purchase? Please indicate the 3 main factors.

Website satisfaction driven by price, trust & safety



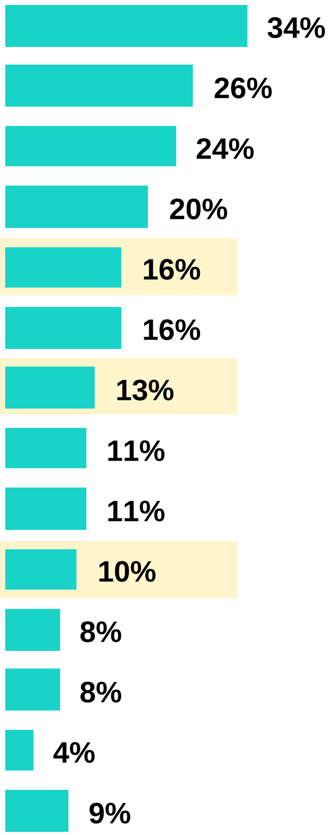
	% indicated as the main factor of using <website>	Difference 2019 - 2018	Difference 2019 - 2011
Price	22%	+1%	-9%
Satisfaction with previous experiences	9%	+1%	-3%
Quick delivery	6%	-1%	-4%
Out of habit	6%	+1%	-2%
Trust and safety	5%	+2%	+2%
Product selection and availability	5%	-1%	-8%
User-friendliness of the website	4%	0%	-2%
Low shipment costs	3%	0%	-3%
Accidental - just where I found it	3%	+1%	0%
Recommended by a friend	2%	+1%	0%
Return or guaranty policy	1%	-1%	-2%
Completeness of the product information	1%	+1%	-9%
Because I can always send back the product within a fortnight	1%	+1%	-3%
Other reason	2%	0%	-2%

E-commerce experience

Barriers

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

Major improvements over the years in terms of payment and security



	2019	2018	2017	2016	2015	2014	2013	2012	2011
I want to see it or try it before deciding to buy and that is not possible with e-commerce	**34%**	30%	37%	36%	38%	31%	37%	41%	37%
I want to see whether items are in stock in a physical shop	**26%**	21%	18%	21%	22%	17%	19%	15%	15%
I have access to all the products or services I need in physical shops	**24%**	23%	22%	26%	26%	19%	17%	23%	23%
I want to talk to a shop assistant or dealer when I want more information on a product or service	**20%**	19%	22%	22%	25%	19%	20%	23%	22%
I have serious doubts as for the security level of online purchases or orders	**16%**	16%	19%	22%	24%	25%	31%	30%	36%
I have to be home when the products are delivered	**16%**	16%	18%	14%	13%	14%	19%	16%	16%
I don't like to give my personal information on the Internet	**13%**	15%	19%	24%	24%	25%	22%	32%	31%
I have a wider selection of products or services in the real world	**11%**	13%	13%	14%	12%	11%	10%	9%	7%
there is more product information available in the real world	**11%**	8%	8%	8%	8%	6%	6%	9%	7%
I don't have or don't want to use a credit card	**10%**	17%	18%	18%	20%	24%	24%	29%	27%
I don't have sufficient Internet experience yet	**8%**	9%	10%	8%	10%	11%	11%	11%	8%
prices aren't lower on the Internet	**8%**	7%	6%	7%	6%	10%	8%	7%	7%
I have experienced too many failed attempts to orderorpurchase something online	**4%**	4%	4%	3%	3%	5%	5%	3%	5%
Other reason	**9%**	7%	8%	3%	5%	5%	3%	3%	4%

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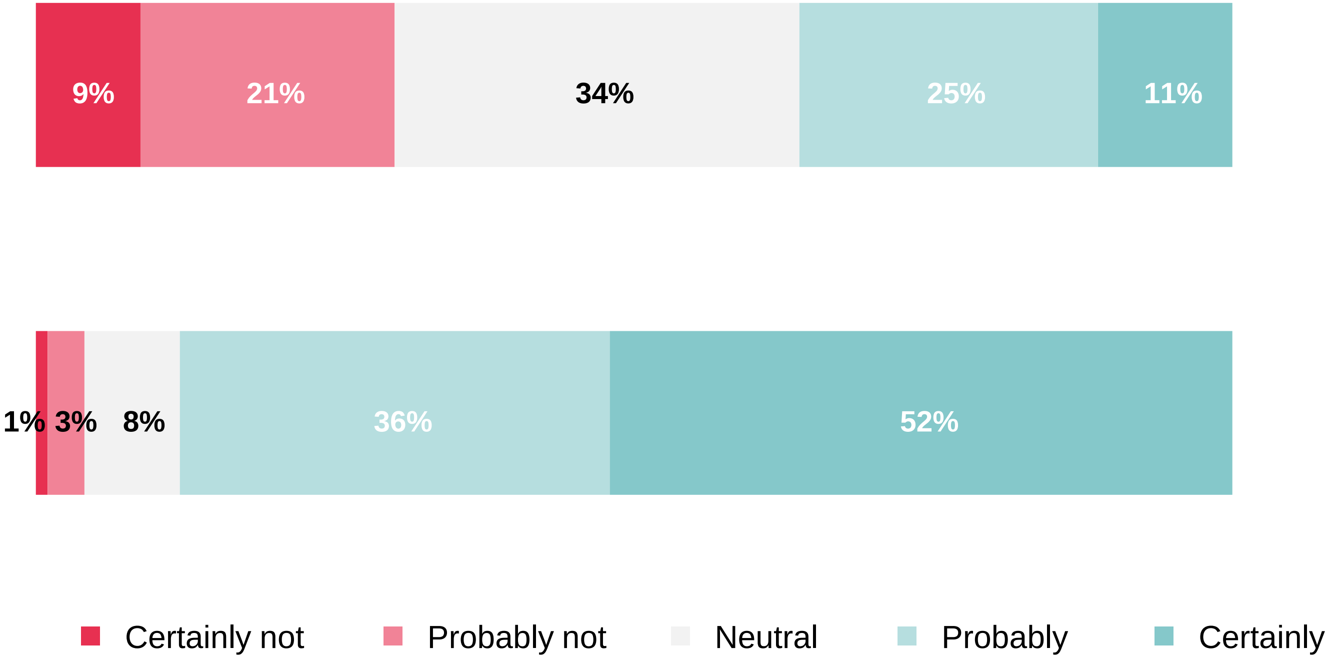
E-commerce experience

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?

Once experienced, forever convinced

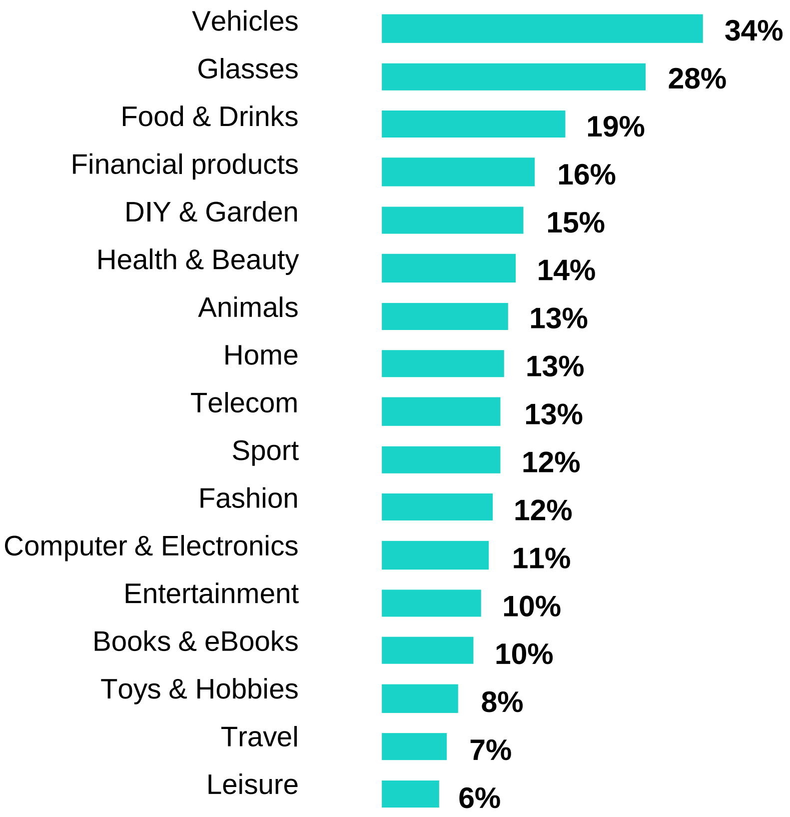


E-commerce experience

Rejection to buy online (non buyers included)

Q: Which of the following products/ services would you **never (again)** purchase online?

Higher rejection rate for non-recurrent purchases

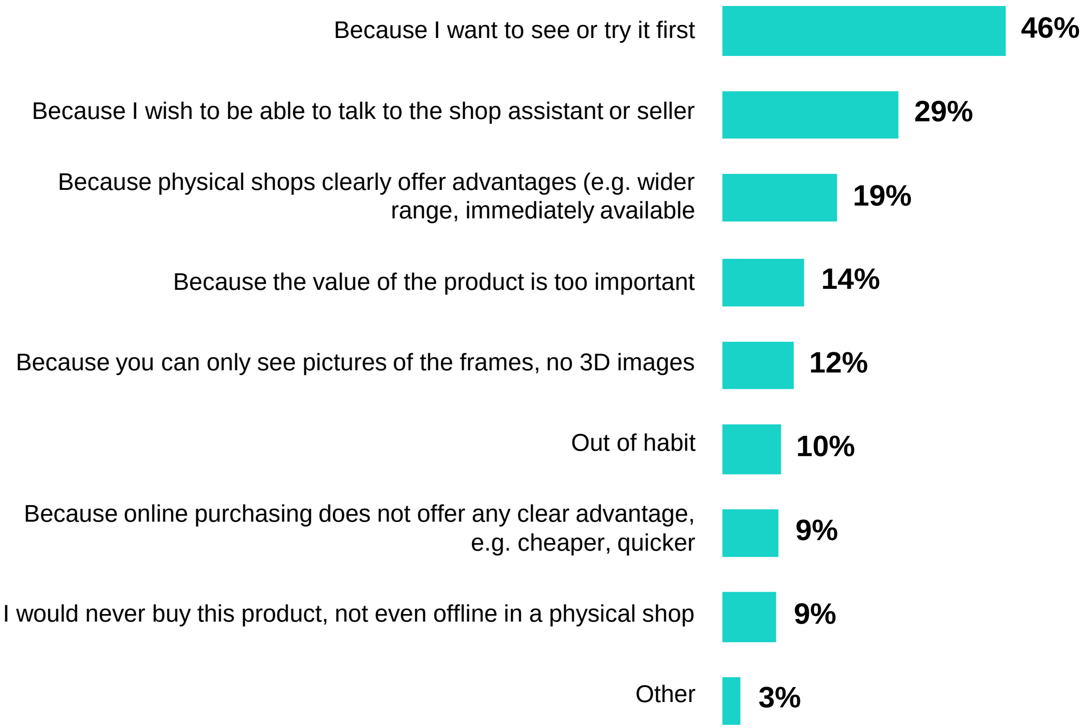


E-commerce experience

Reasons of rejection to buy online (non buyers included)

Q: Why would you never buy the following three products online (again)?

Some people need to see in order to believe it



DEVICES

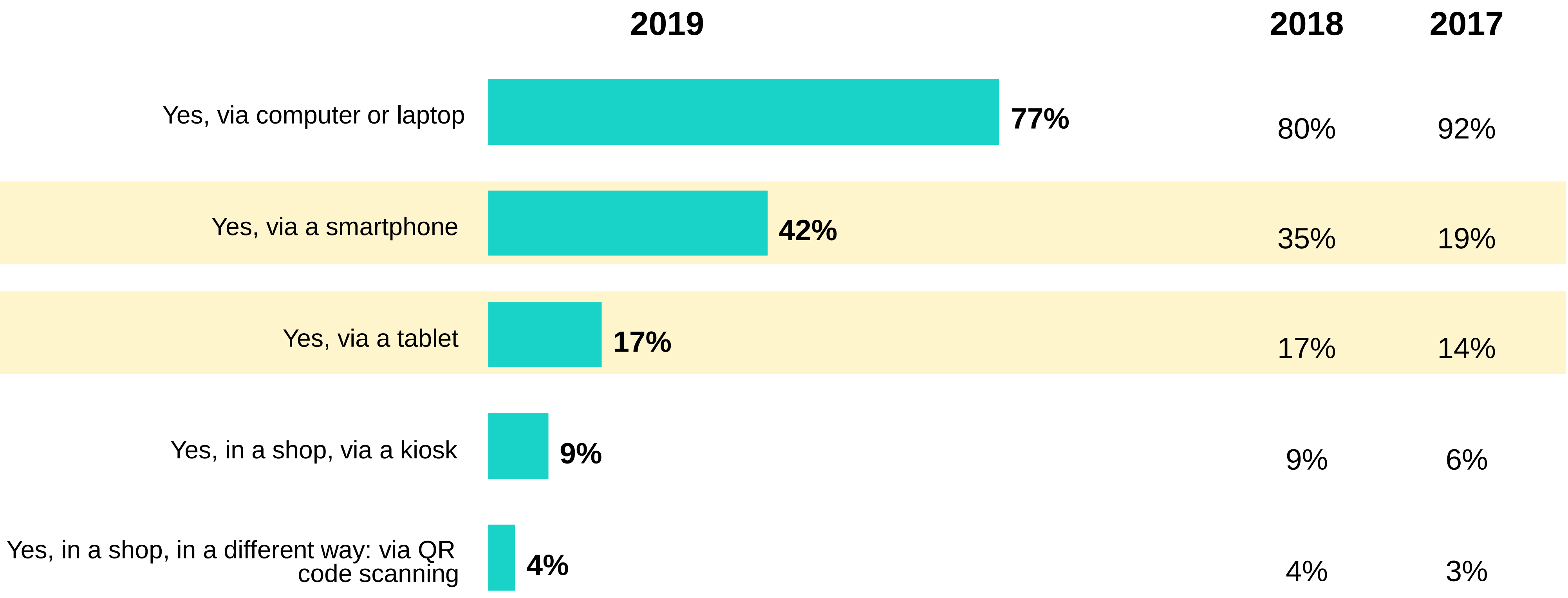

PAY

Devices

Penetration

6 out of 10 buys mobile

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

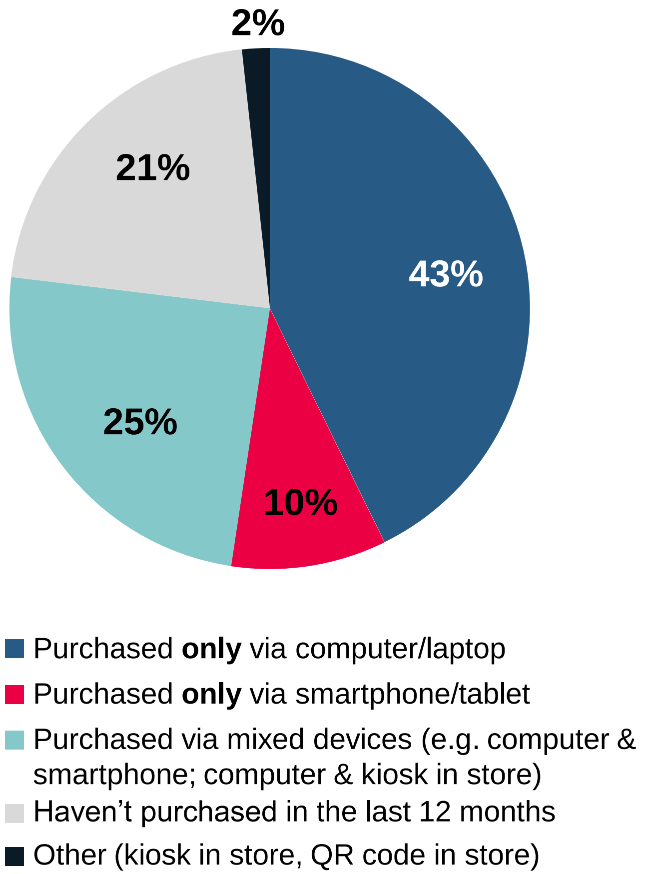


	2019	2018	2017
Yes, via computer or laptop	**77%**	80%	92%
Yes, via a smartphone	**42%**	35%	19%
Yes, via a tablet	**17%**	17%	14%
Yes, in a shop, via a kiosk	**9%**	9%	6%
Yes, in a shop, in a different way: via QR code scanning	**4%**	4%	3%

Devices

Devices used for purchasing

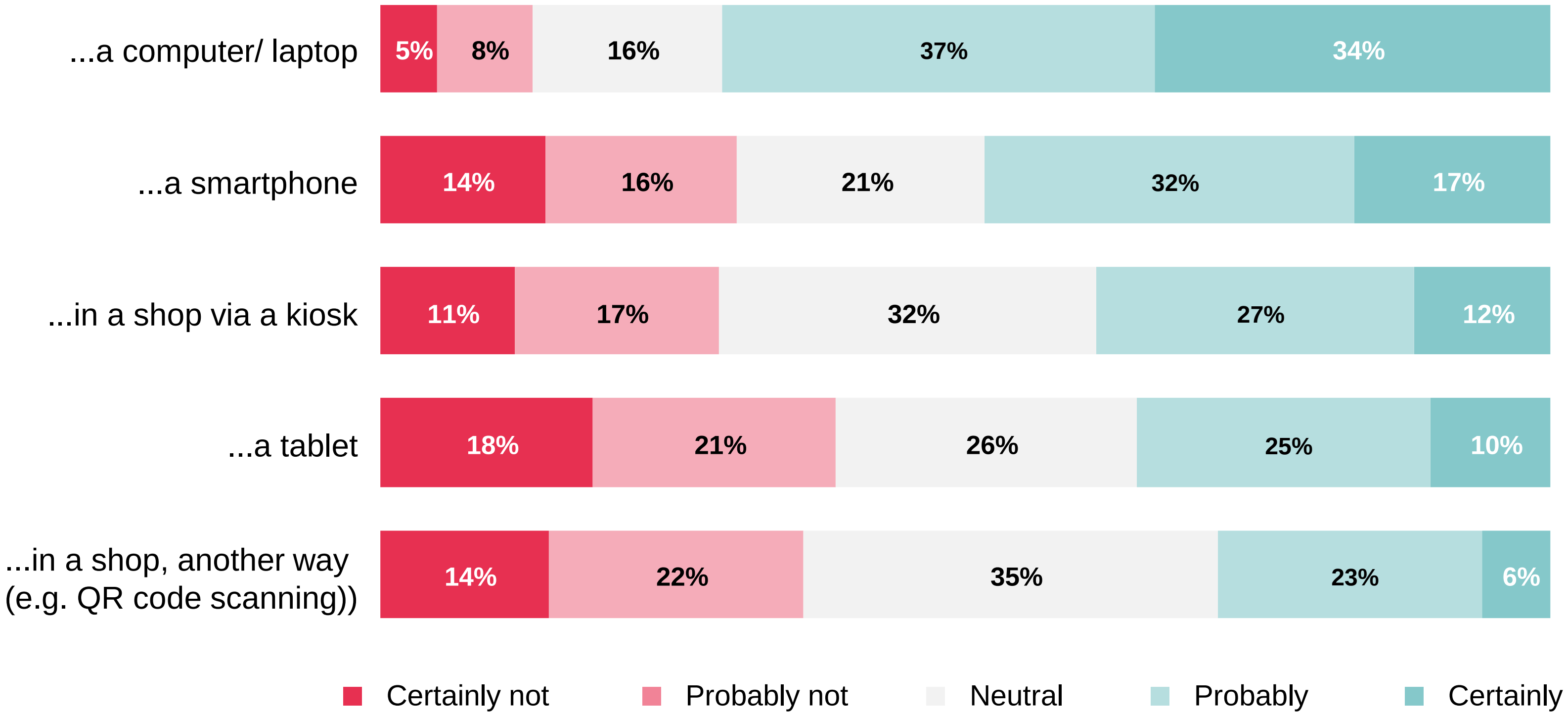
Q: Did you buy new -non-secondhand - products or services via the Internet in the past 12 months?



Devices

Future intention to buy

Q: Do you consider buying new products/ services via the internet in the future, via...?



% Certainly/probably

2019	2018	2017
71%	71%	67%
48%	40%	32%
39%	38%	32%
35%	32%	28%
28%	25%	19%

Devices

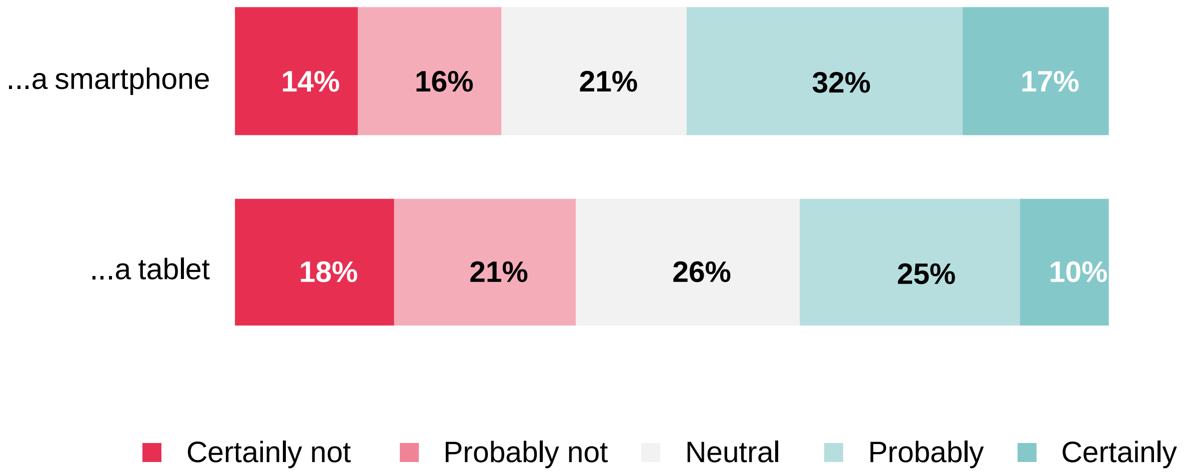
Future intention to buy on mobile device

Q: Do you consider buying new products/ services via the internet in the future, via...?

Mobile aficionados doubled in 5 years time

% Certainly/ probably buy on a smartphone <u>or</u> tablet

2019	2018	2017	2016	2015
58%	51%	41%	31%	28%

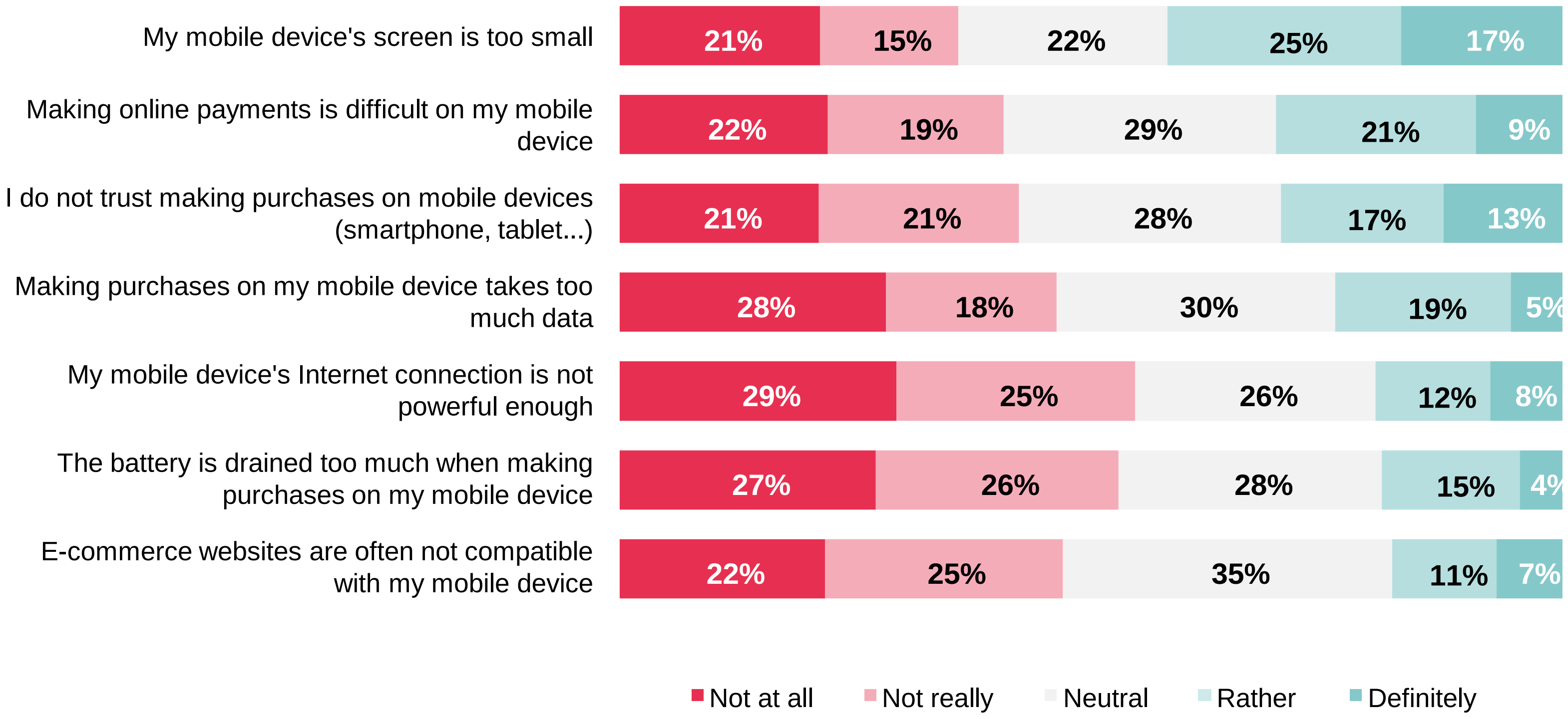


Devices

Barriers for making mobile purchases

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

Trust no longer an issue when making mobile purchases



% Definitely / rather

2019	2018	2017	2016
42%	45%	52%	51%
30%	35%	37%	37%
30%	45%	37%	41%
24%	29%	31%	32%
20%	19%	25%	26%
19%	26%	27%	27%
18%	21%	31%	28%

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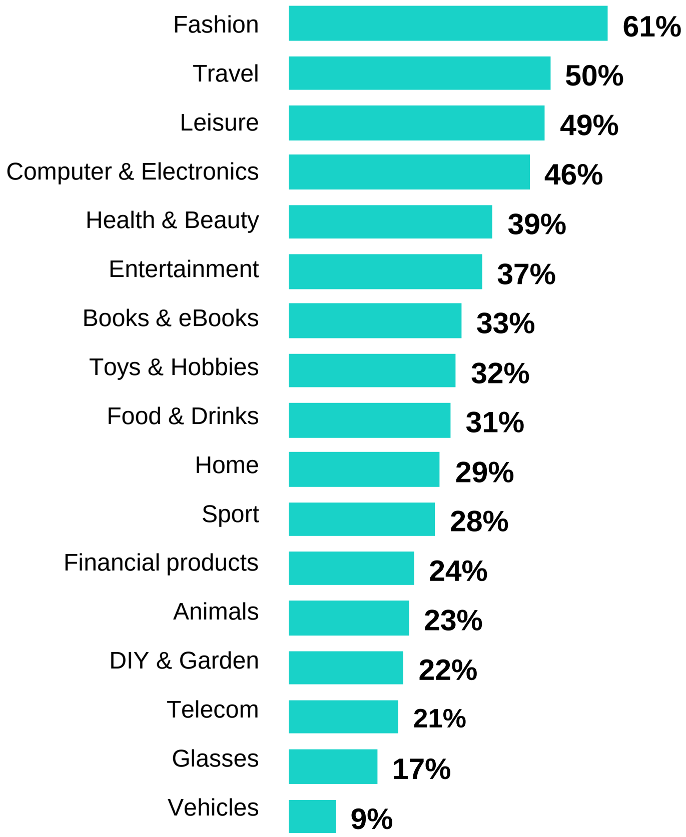
ONLINE PURCHASES

Online purchases

Current purchase new products

Q: Below we have listed all new products and services which you have bought in the past 12 months.
Please indicate for each product/ service via which channel you bought it.

Nothing beats fashion, travel and leisure

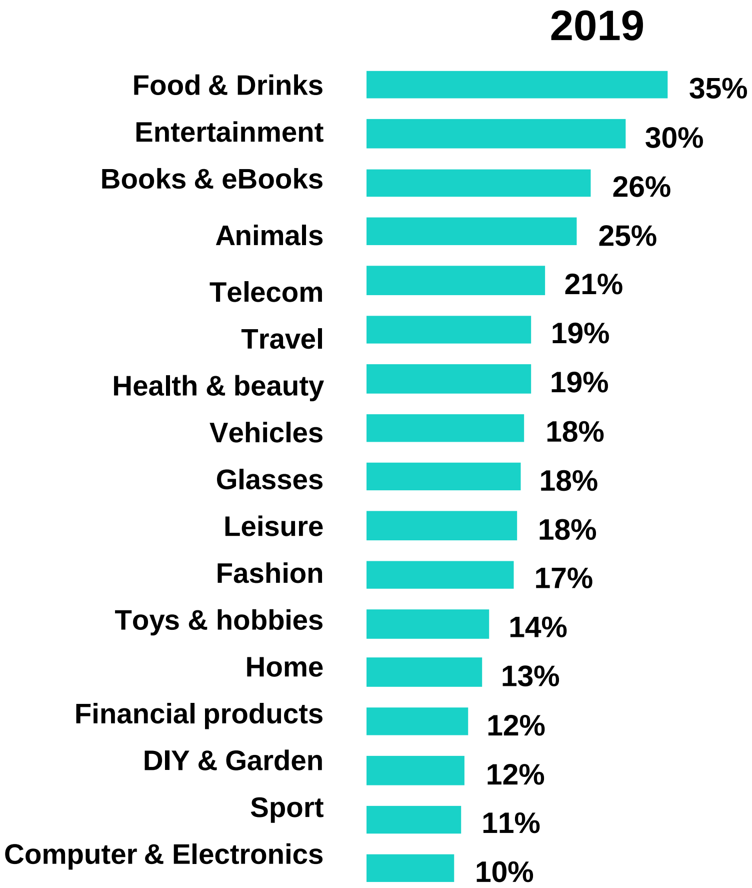


Online purchases

Buying frequency - more than 5 times

Q: Please indicate how often you bought the following new products and services via the Internet in the past 12 months?

Food and Drinks: most recurrent purchase



	2019	Difference 2019 - 2018	Difference 2019 - 2011
Food & Drinks	35%	N.A.	N.A.
Entertainment	30%	+3%	+4%
Books & eBooks	26%	+1%	+12%
Animals	25%	-2%	N.A.
Telecom	21%	-3%	+3%
Travel	19%	N.A.	N.A.
Health & beauty	19%	+4%	+11%
Vehicles	18%	-7%	+18%
Glasses	18%	N.A.	N.A
Leisure	18%	N.A.	N.A.
Fashion	17%	N.A.	N.A.
Toys & hobbies	14%	+2%	+5%
Home	13%	+3%	+12%
Financial products	12%	0%	N.A.
DIY & Garden	12%	0%	+9%
Sport	11%	-3%	-2%
Computer & Electronics	10%	+4%	+6%

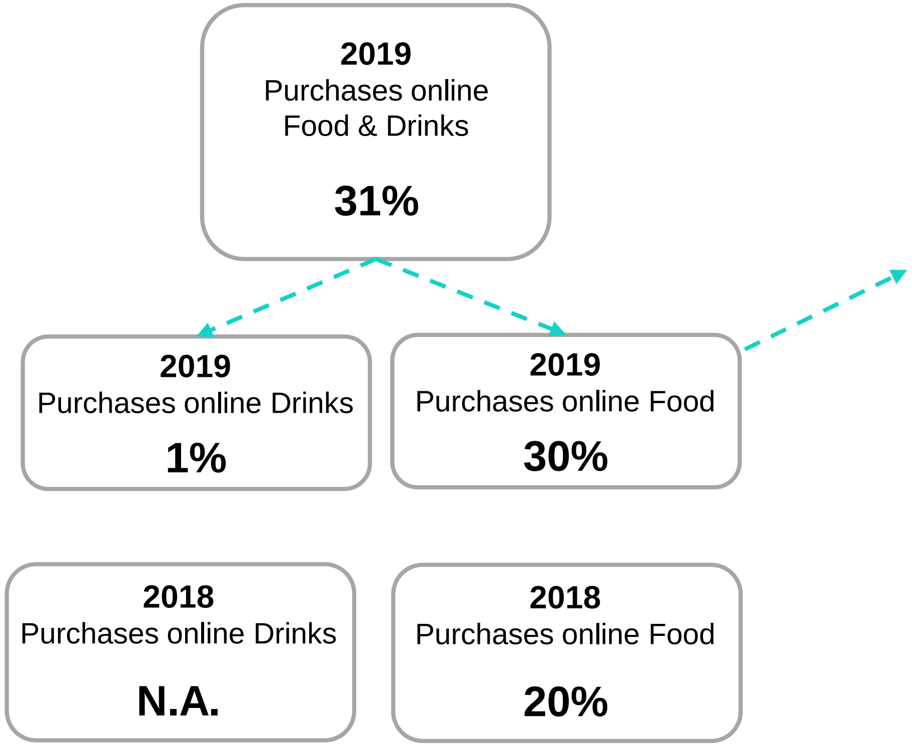
Note:
- The category 'Food' includes now 'Pralines and sweets', 'Drinks (wine, liqueur, beer, non-alcoholic)' and 'Nutritional supplements'.
- The category Travel & Leisure was split up and the category 'Glasses' was removed from the Fashion category and added as a stand-alone category in 2019.

Online purchases

Current purchase new products

1 out of 7 buys groceries online

Q: Below we have listed all new products and services which you have bought in the past 12 months.
Please indicate for each product/ service via which channel you bought it.



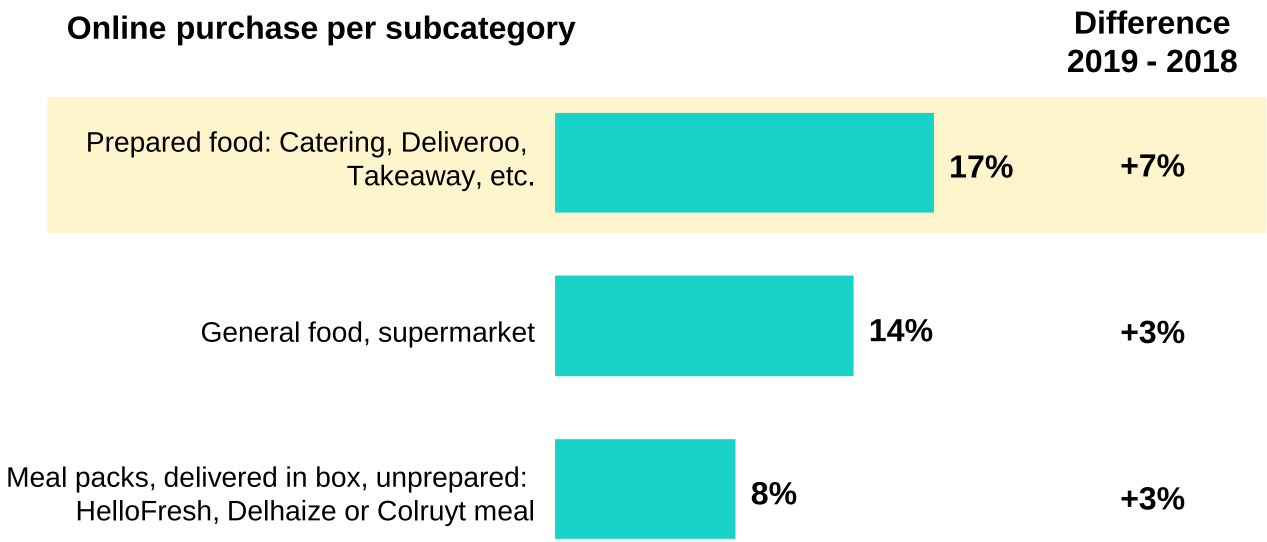
2019
Purchases online
Food & Drinks
31%

2019
Purchases online Drinks
1%

2019
Purchases online Food
30%

2018
Purchases online Drinks
N.A.

2018
Purchases online Food
20%



Online purchases

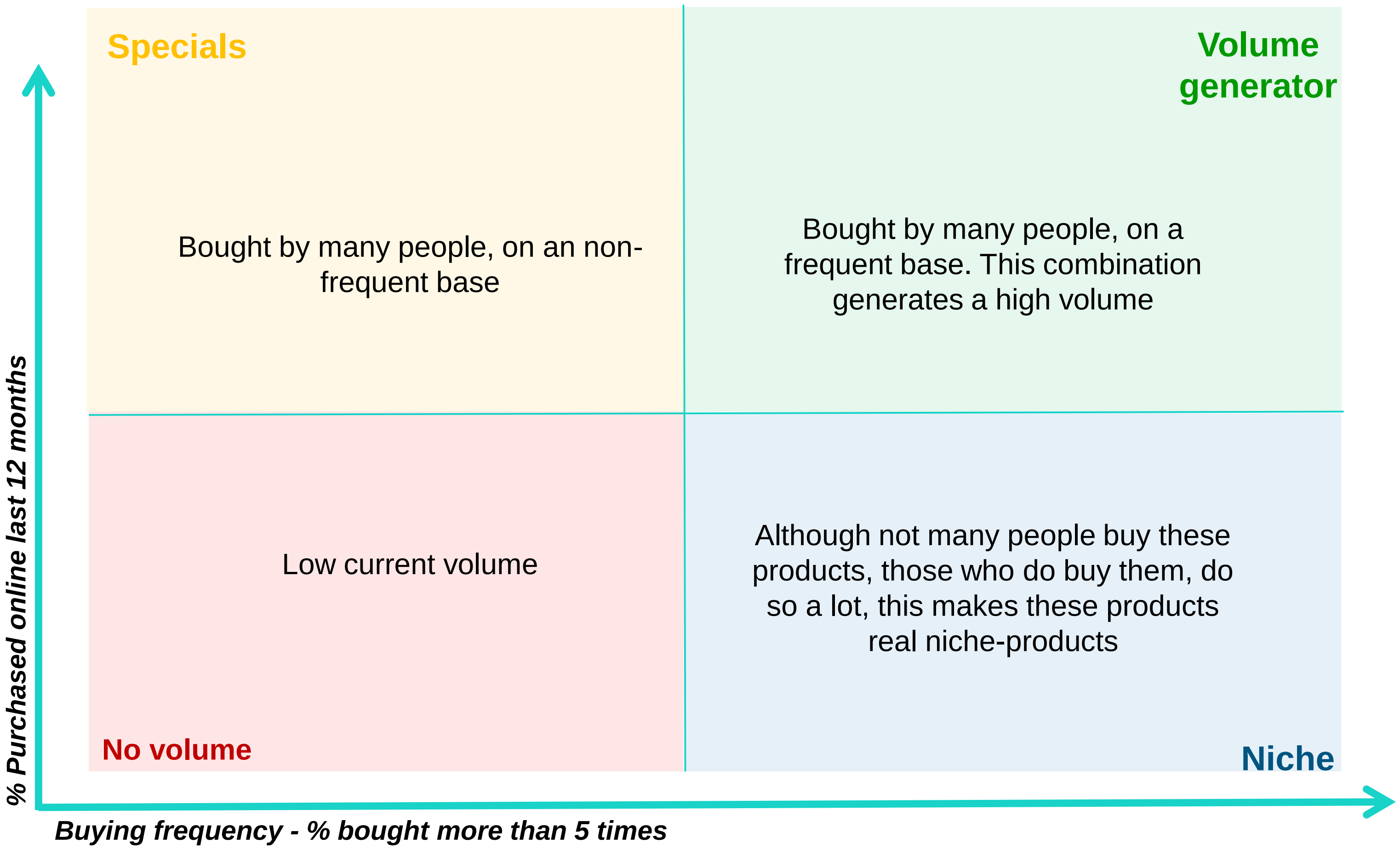
Drivers for buying food online

E-grocery buyer wants convenience

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

Online purchases

Quadrant explanation



Specials

Bought by many people, on an non-frequent base

Volume generator

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

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

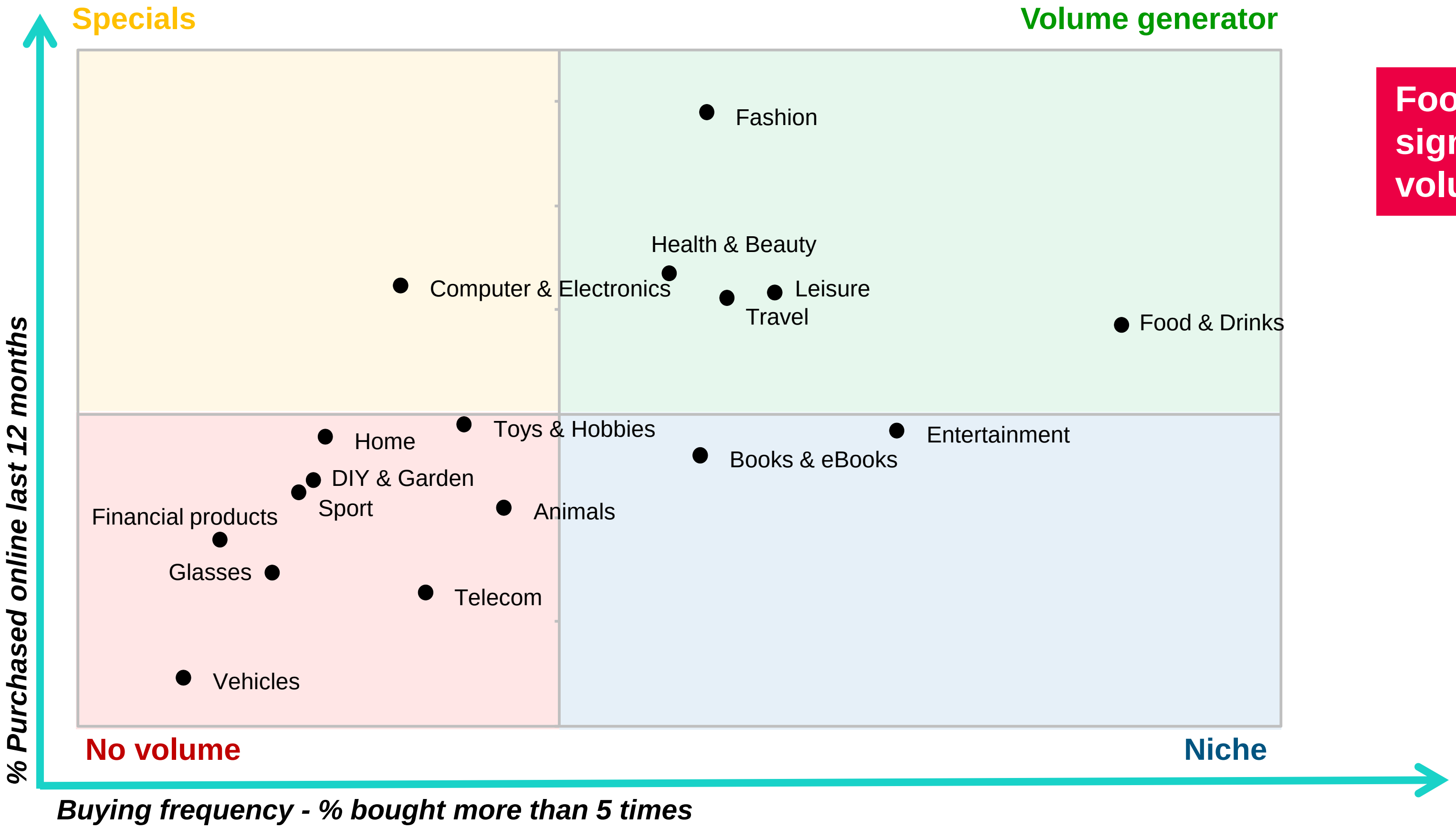
% Purchased online last 12 months

Buying frequency - % bought more than 5 times

Online purchases

Quadrant 2019

Q: Below we have listed all new products and services which you have bought in the past 12 months. Please indicate for each product/ service via which channel you bought it? Please indicate how often you bought the following new products via the Internet (for personal purposes) in the past 12 months?



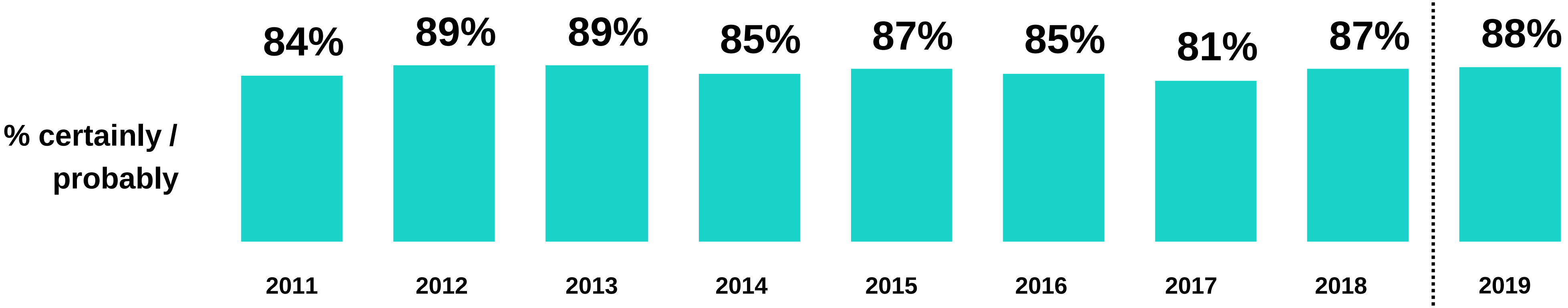
Food and Drinks: significant increase in volume and penetration

Online purchases

Future intention to buy

Q: Would you consider buying new products/services on the Internet in the future?

Vast majority convinced, only 1 out of 25 reluctant

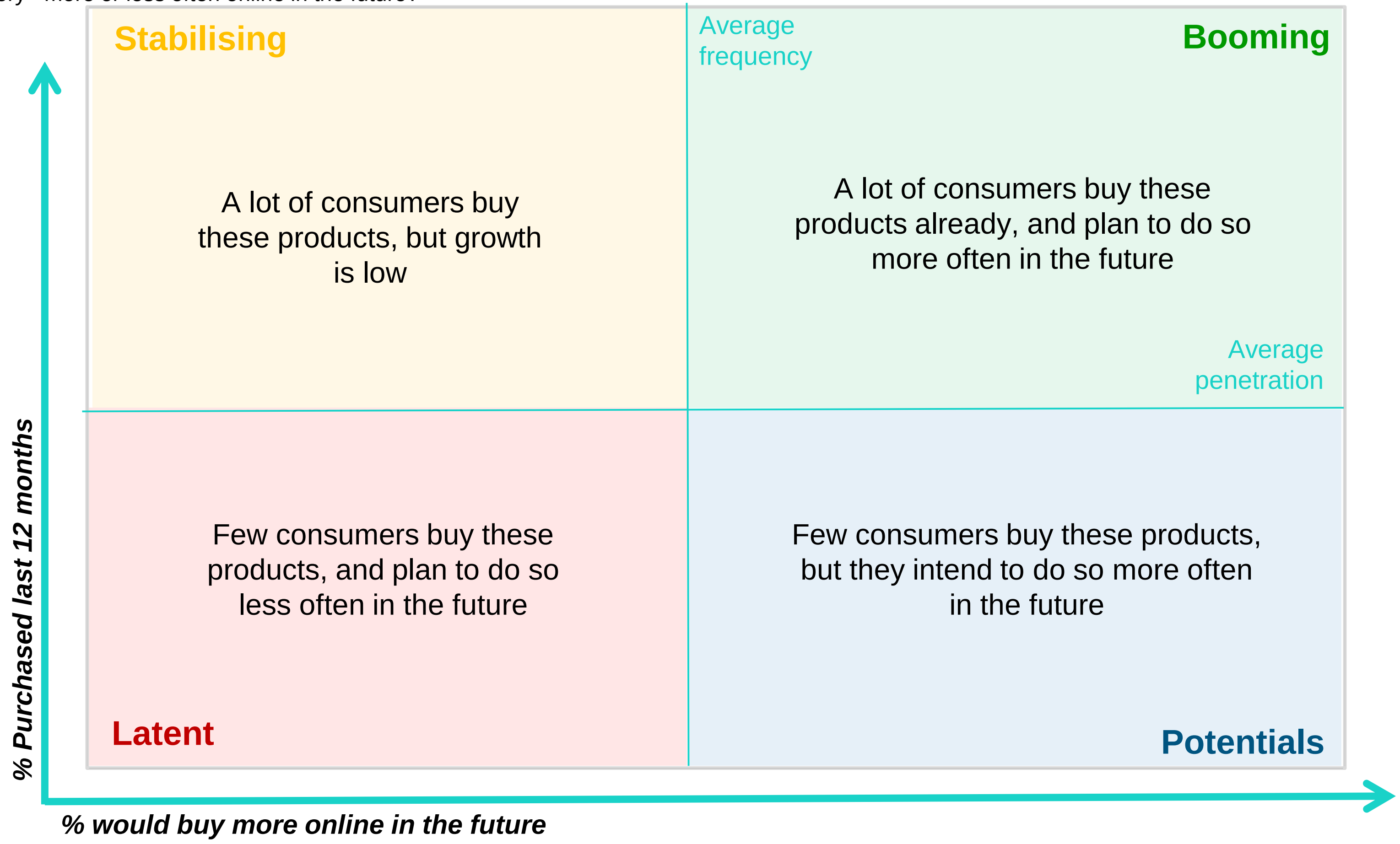


	2011	2012	2013	2014	2015	2016	2017	2018	2019
Certainly	31%	41%	38%	37%	40%	41%	34%	48%	**52%**
Probably	53%	48%	51%	48%	47%	44%	47%	39%	**36%**
Neutral	13%	9%	9%	13%	11%	12%	15%	10%	**8%**
Probably not	2%	2%	2%	1%	2%	2%	4%	2%	**3%**
Certainly not	0%	0%	0%	1%	0%	0%	0%	1%	**1%**

Online purchases

Quadrant methodology

Q: Below we have listed all new products and services which you have bought in the past 12 months. Please indicate for each product/ service via which channel you bought it.?
Do you expect to buy <category> more or less often online in the future?



Stabilising

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

Average frequency

Booming

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

Average penetration

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

Latent

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

Potentials

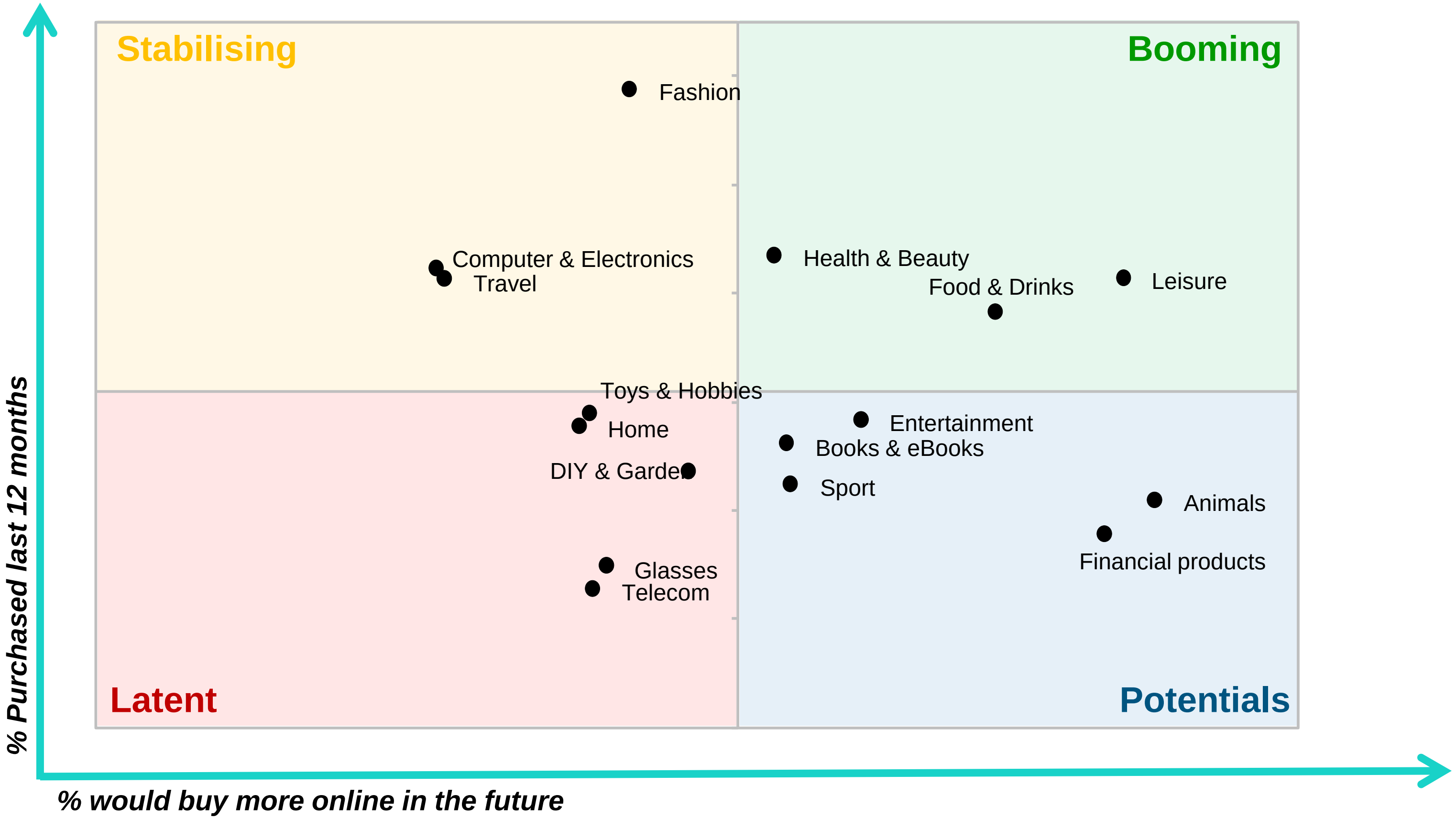
% Purchased last 12 months

% would buy more online in the future

Online purchases

Quadrant 2019

Q: Below we have listed all new products and services which you have bought in the past 12 months. Please indicate for each product/ service via which channel you bought it.?
Do you expect to buy <category> more or less often online in the future?



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SECTOR
FOCUS

Sector focus

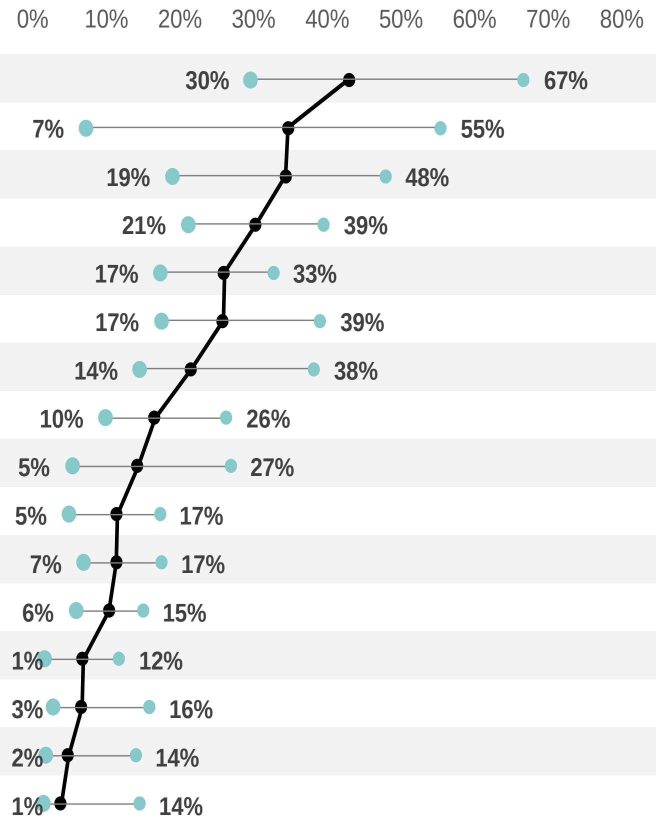
Drivers for E-commerce – per category

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

Time & Convenience

Money

Purchase Management



	Min			Max
Because it saves time	*Vehicles*	30%	67%	*Leisure*
Because it gets delivered to my door	*Travel*	7%	55%	*Food & Drinks*
Because I can find products and services at lower prices	*Food & Drinks*	19%	48%	*Health & Beauty*
Because I'm able to shop 24 hours a day	*Food & Drinks*	21%	39%	*Travel*
Because I have a wider selection of products/services online	*Food & Drinks*	17%	33%	*Entertainment*
Because I get access to special discounts, promotions...	*Financial products*	17%	39%	*Health & Beauty*
Because I can compare and review different products/services	*Books & eBooks*	14%	38%	*Travel*
Because I avoid crowds	*Travel*	10%	26%	*Food & Drinks*
Because there is more product information online	*Fashion*	5%	27%	*Financial products*
Because I can see whether items are in stock	*Financial products*	5%	17%	*Books & eBooks*
Because I can follow the order and the delivery online	*Books & eBooks*	7%	17%	*Food & Drinks*
Because I get access to products/services that aren't available in my country	*Leisure*	6%	15%	*Books & eBooks*
Because I can always send back the product within a fortnight	*Leisure*	1%	12%	*Sport*
Because I can try the product at home	*Leisure*	3%	16%	*Vehicles*
Because I can buy it anonymously- without having to create an account	*Toys & Hobbies*	2%	14%	*Vehicles*
Other reason	*Sport*	1%	14%	*Leisure*

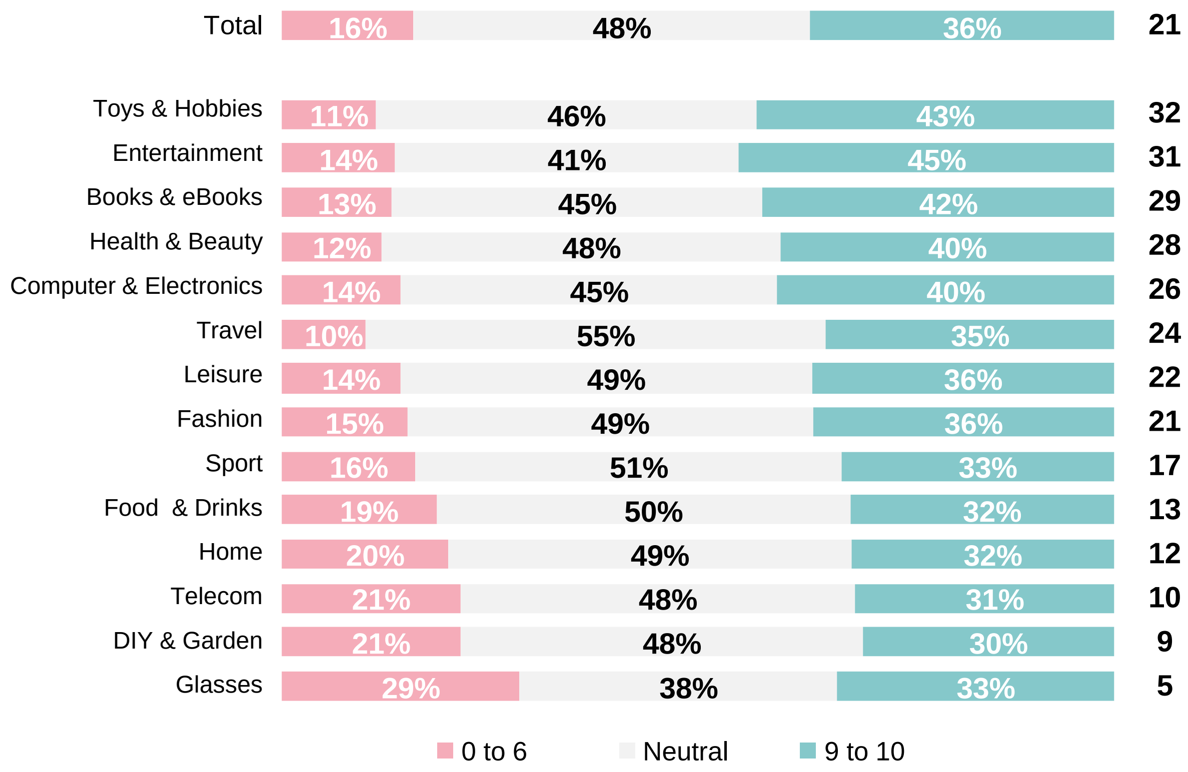
Sector focus

Website Recommendation

Q: Please think back to the entire process of your online purchase of PRODUCT.
How likely are you to recommend WEBSITE to a friend, on a scale from 0 to 10?

Special treats purchases most likely to be recommended

NPS (Top 2 – Bottom 6)



	0 to 6	Neutral	9 to 10		2018	2017	2016	2015	2014	2013	2012	2011
Total	16%	48%	36%	21	22	25	30	27	27	22	34	21
Toys & Hobbies	11%	46%	43%	32	26	37	35	28	28	30	40	N.A.
Entertainment	14%	41%	45%	31	26	34	34	31	27	26	42	24
Books & eBooks	13%	45%	42%	29	36	28	37	33	34	34	39	24
Health & Beauty	12%	48%	40%	28	29	27	44	33	26	12	39	37
Computer & Electronics	14%	45%	40%	26	25	28	36	29	26	18	37	25
Travel	10%	55%	35%	24	N.A	N.A	N.A	N.A.	N.A.	N.A.	N.A.	N.A.
Leisure	14%	49%	36%	22	N.A	N.A	N.A	N.A.	N.A.	N.A.	N.A.	N.A.
Fashion	15%	49%	36%	21	N.A	N.A	N.A	N.A.	N.A.	N.A.	N.A.	N.A.
Sport	16%	51%	33%	17	21	33	32	23	32	25	52	2
Food & Drinks	19%	50%	32%	13	N.A	N.A	N.A	N.A.	N.A.	N.A.	N.A.	N.A.
Home	20%	49%	32%	12	18	17	18	15	2	10	5	6
Telecom	21%	48%	31%	10	8	6	7	13	13	11	9	3
DIY & Garden	21%	48%	30%	9	13	24	24	12	7	0	41	9
Glasses	29%	38%	33%	5	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

Sector focus

Purchase amount

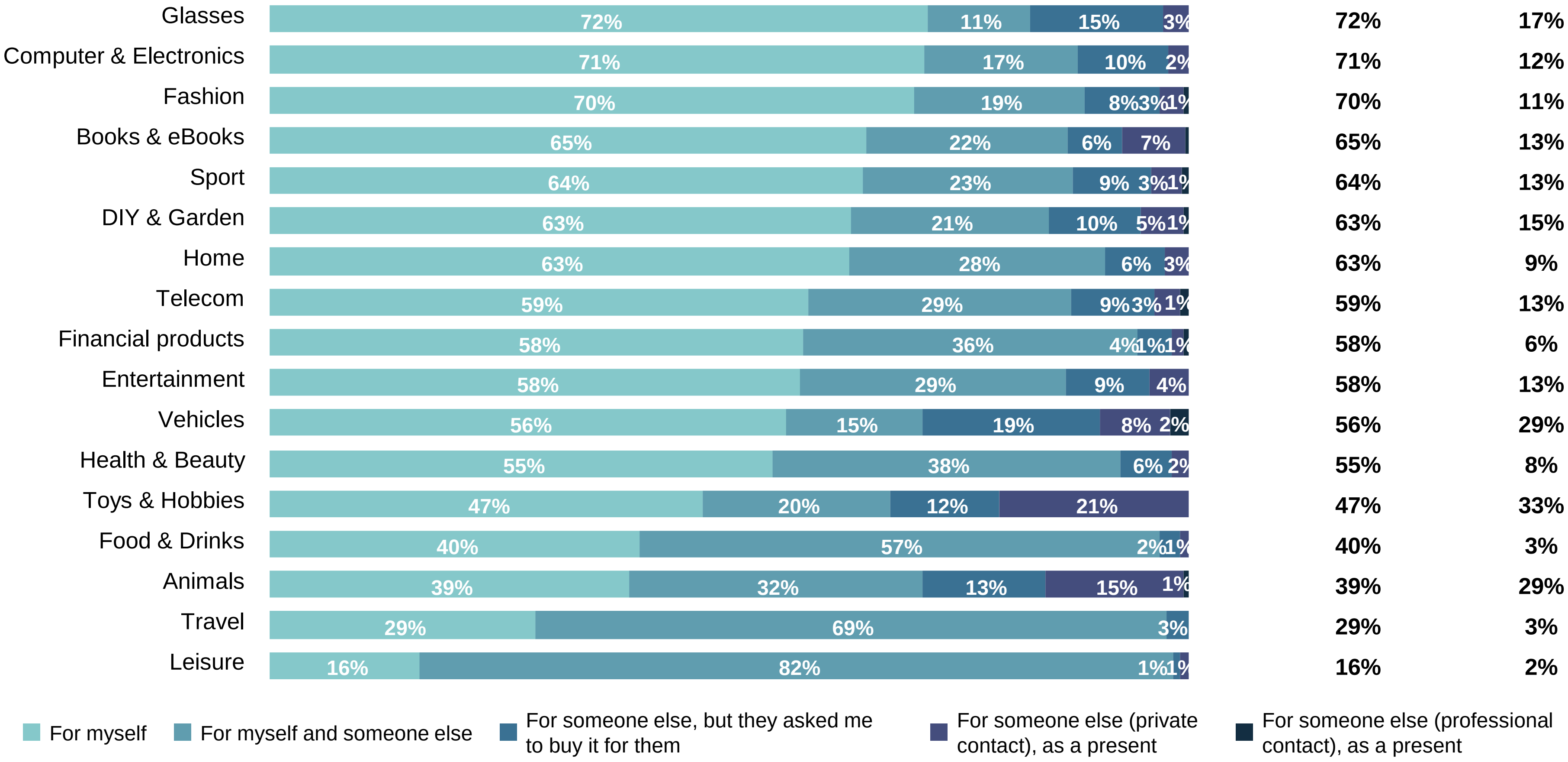
Q: How much money did you spend at your most recent online purchase?

	2019	2018	2017	2016
Vehicles	**4053€**	N.A.	N.A.	N.A.
Glasses	**779€**	N.A.	N.A.	N.A.
Travel	**533€**	N.A.	N.A.	N.A.
Computer & Electronics	**243€**	**238€**	**269€**	**328€**
DIY & Garden	**142€**	**119€**	**147€**	**167€**
Home	**125€**	**151€**	**142€**	**246€**
Sport	**98€**	**79€**	**87€**	**94€**
Leisure	**78€**	N.A.	N.A.	N.A.
Animals	**74€**	**75€**	**83€**	N.A.
Fashion	**71€**	N.A.	N.A.	N.A.
Telecom	**70€**	**74€**	**64€**	**61€**
Health & Beauty	**64€**	**61€**	**58€**	**60€**
Toys & Hobbies	**54€**	**56€**	**84€**	**69€**
Food & Drinks	**53€**	N.A.	N.A.	N.A.
Entertainment	**51€**	**43€**	**43€**	**39€**
Books & eBooks	**29€**	**31€**	**34€**	**33€**

Sector focus

Who are you buying for

Q: When you bought <PRODUCT> online, was it intended for yourself or for someone else?



	% for myself	% for someone else
Glasses	72%	17%
Computer & Electronics	71%	12%
Fashion	70%	11%
Books & eBooks	65%	13%
Sport	64%	13%
DIY & Garden	63%	15%
Home	63%	9%
Telecom	59%	13%
Financial products	58%	6%
Entertainment	58%	13%
Vehicles	56%	29%
Health & Beauty	55%	8%
Toys & Hobbies	47%	33%
Food & Drinks	40%	3%
Animals	39%	29%
Travel	29%	3%
Leisure	16%	2%

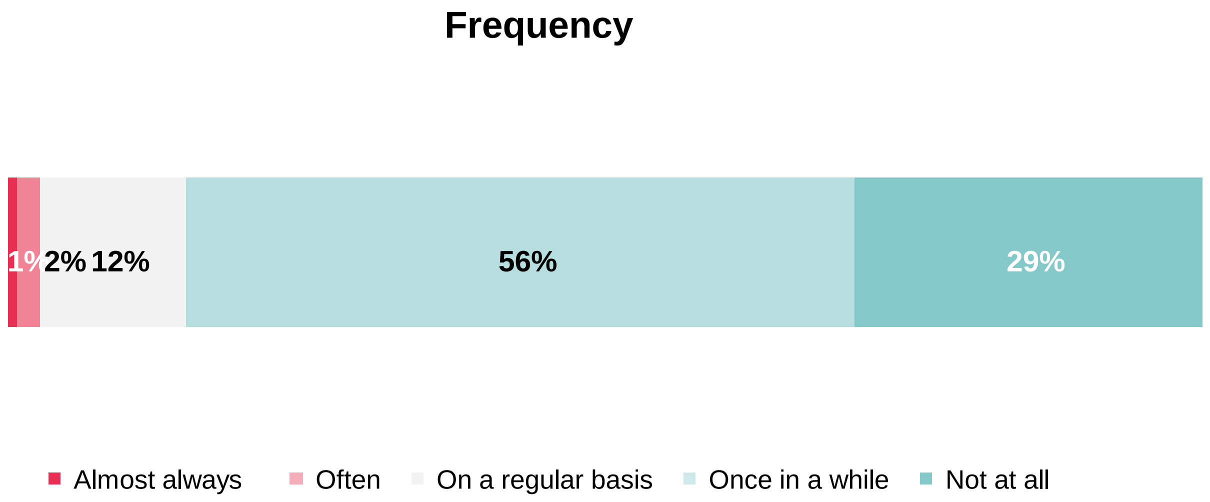
E-COMMERCE TRUST

E-commerce trust

Frequency of returning products

Decrease in returning products

Q: How often do you send back products which you bought via the Internet?



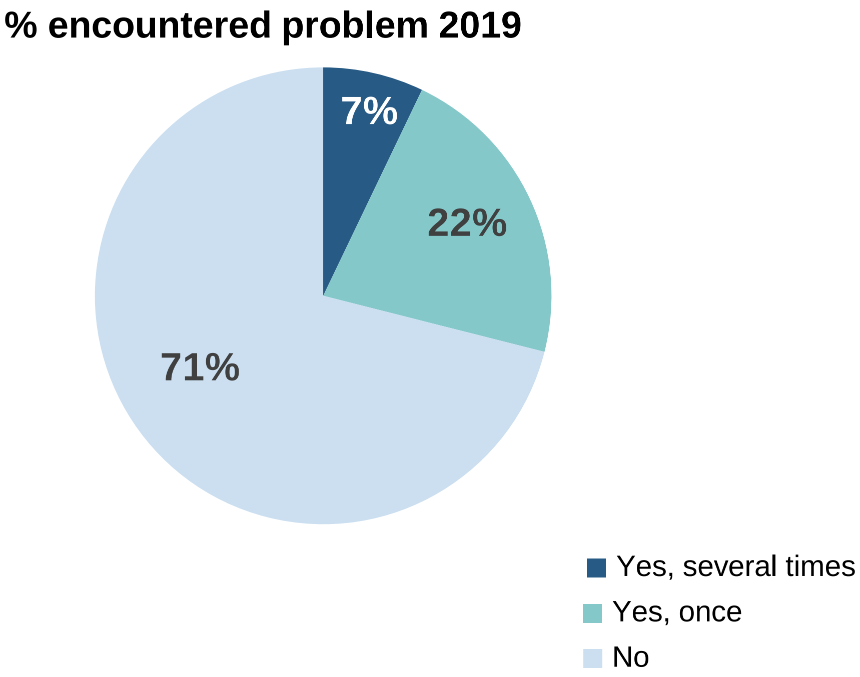
% Once in a while/ not at all

2019	2018	2017
85%	89%	87%

E-commerce trust

Encountered problem (purchase)

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



	2018	2017
Yes, several times	**8%**	**6%**
Yes, once	**19%**	**17%**
No	**73%**	**77%**

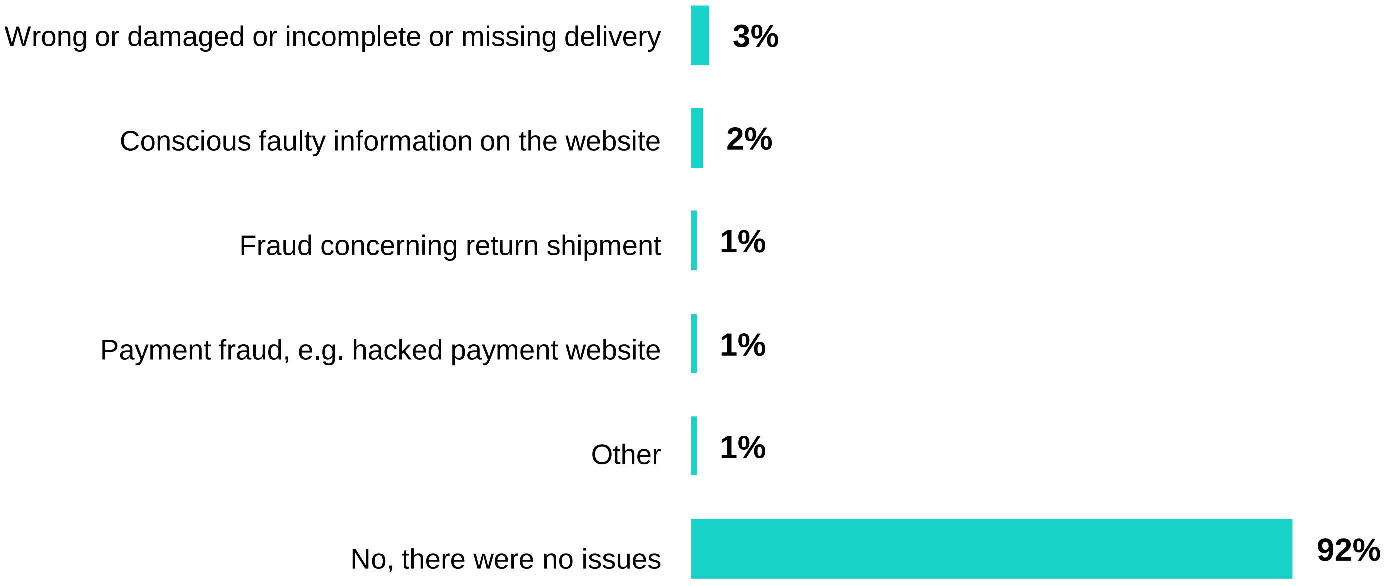
n = 2062 | Filter: None

E-commerce trust

Encountered problem (delivery)

Delivery process nearly flawless

Q: Have you experienced problems with your delivery? If yes, which ones?



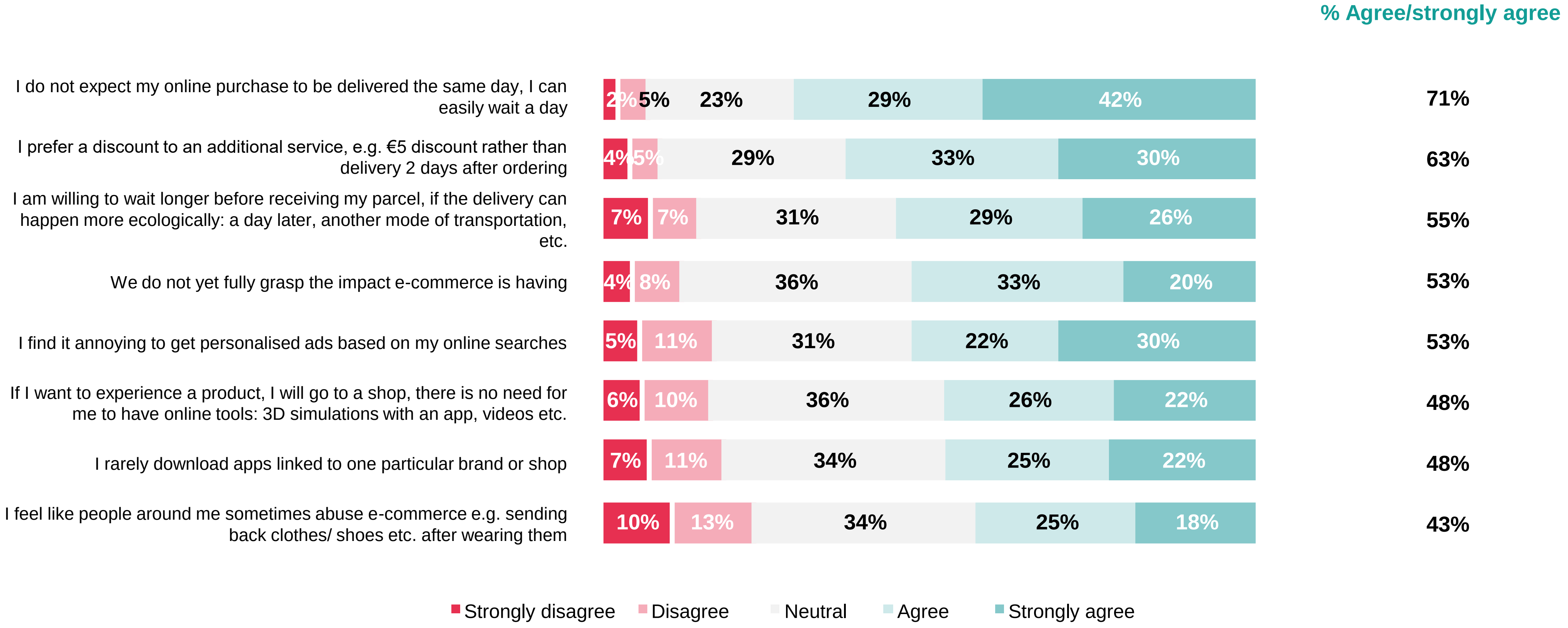
TRENDS & ATTITUDE

Trends & attitude

Details

Brand apps are not a must have

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

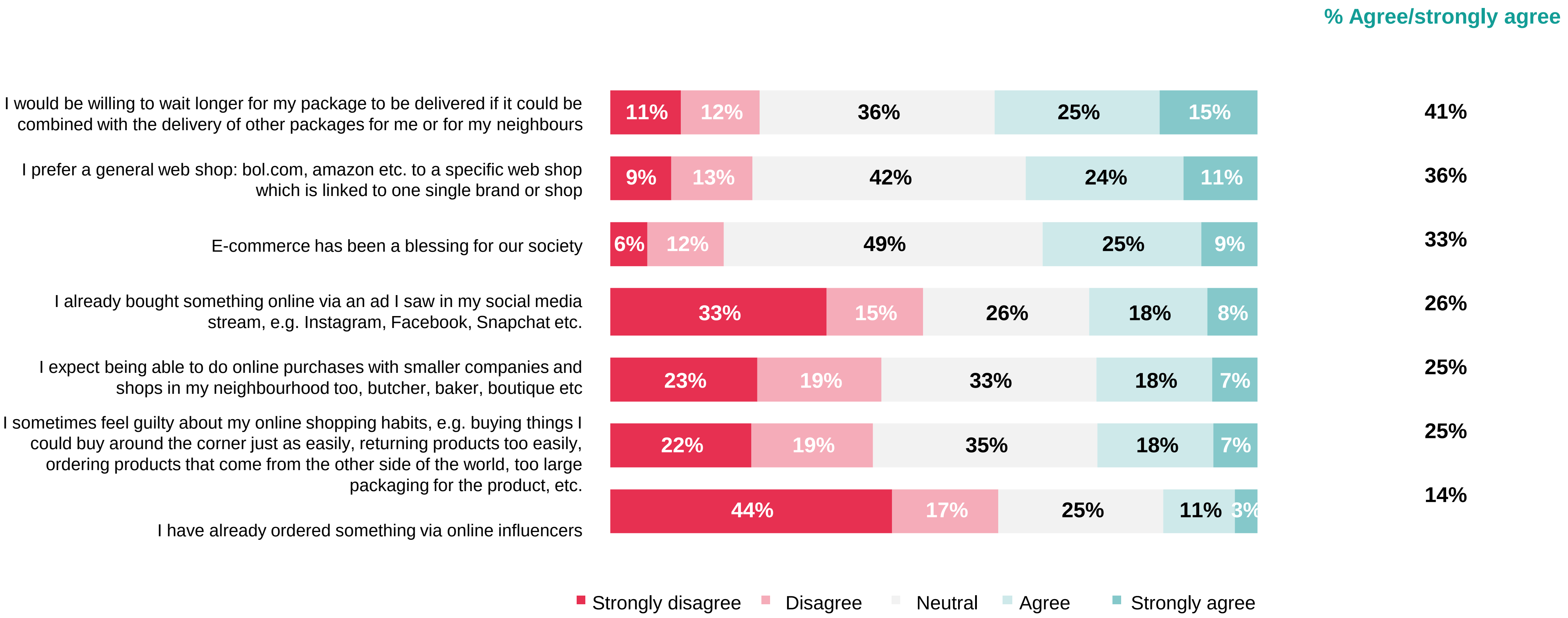


Trends & attitude

Details

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

Be sure to consider online influencers



Trends & attitude

Difference

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

Omnichannel remains essential

% Agree/strongly agree

	2019	**2018**	**2017**	**2016**	**2015**	**2014**
Before I go shopping, I often look for inspiration online so I know exactly what I wish to buy in the shop	**48%**	48%	44%	45%	45%	N.A.
I often go shopping, simply to get inspiration and ideas; afterwards I buy online what I found interesting in the shops	**26%**	28%	23%	24%	23%	N.A.

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ADDENDUM

for commerce
and services

List of categories (1)

Note: in the survey we refer to ‘products & services’ of these categories. For some categories this is made explicit (eg music streaming service), for others not (eg car rental services). The list of (sub)categories is revised every year.

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 care -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
- Jewellery
- Leathers and bags -e.g. handbag, suitcase, sports bag, etc.
- Other fashion accessories -e.g. watches, belts, scarves, etc.

Glasses (NEW)

- Glasses (NEW)
- Reading glasses(NEW)
- Multifocal glasses (NEW)
- Sunglasses (NEW)
- Lenses (NEW)

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)

Note: in the survey we refer to 'products & services' of these categories. For some categories this is made explicit (eg music streaming service), for others not (eg car rental services). The list of (sub)categories is revised every year.

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 & Drinks

- General food -supermarket
- Prepared food -e.g. takeaway, catering, etc.
- Meal packs, delivered in box –unprepared
- Pralines and sweets (NEW)
- Drinks –wine, liqueur, beer, non-alcoholic (NEW)
- Nutritional supplements (NEW)

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
- Pharmaceutical products – on prescription (NEW)

Sport

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

Animals

- Food products
- Toys and accessories

Travel (NEW)

- Travel tickets -e.g. airplane, boat, train, bus, etc.
- Taxi and other transport services -e.g. taxi, car sharing, etc.
- Hotel/ overnighter bookings

Leisure (NEW)

- 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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