E-COMMERCE SURVEY 2024

Prepared for COMEOS

June 2024

comeos

GAME CHANGERS

Ipsos

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INTRODUCTION

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BACKGROUND & RESEARCH OBJECTIVES

BACKGROUND

In 2023, Comeos wanted to re-initiate the e-commerce survey, after having run it for 10 years, by involving some of their key members active in the field, in order to discover the most relevant topics & challenges for online retailers today. This to offer even more relevant and to-the-point insights tailored to their members.

Now in 2024, the second wave of this study has arrived, delivering evolution insights into existing topics and new insights with regards to consumer communication.

RESEARCH OBJECTIVES

Understand the e-commerce behavior and perception in Belgium.

The topics in this study include:

- What do Belgian online shoppers buy on the internet, versus offline?
- What does the online path to purchase look like for the average Belgian?
  - What triggers them to buy?
  - To what extent do they search for information?
  - Where do they buy?
  - What frustrations do they experience?
  - …
- What is the role of platforms?
- What is the attitude towards and usage of certain digital concepts?
- What is the attitude towards webshop origin?
- To what extent do shoppers contact the webshop?

METHODOLOGY

SAMPLE DESCRIPTION

18- to 70-year-old Belgians who have made at least one online purchase in the past 12 months

DATA COLLECTION METHOD

Online interviews

SAMPLE SIZE

N=2000
Sample size of 2000 was equal for both the first and second wave

AVG. INTERVIEW DURATION

15 minutes

QUOTA

Quota representative for the target group in Belgium on age, gender and region

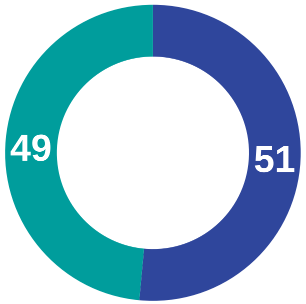
FIELDWORK PERIOD

Wave 1: 08/03/2023 – 20/03/2023
Wave 2: 20/03/2024 – 29/03/2024

PROFILE OF THE SAMPLE

The profile of Belgians who made at least one online purchase in the past 12 months remains stable and in line with national representative figures for Belgium.

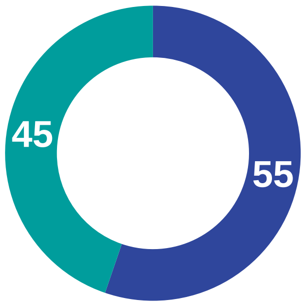
GENDER



♂ **MEN**

♀ **WOMEN**

LANGUAGE



DUTCH

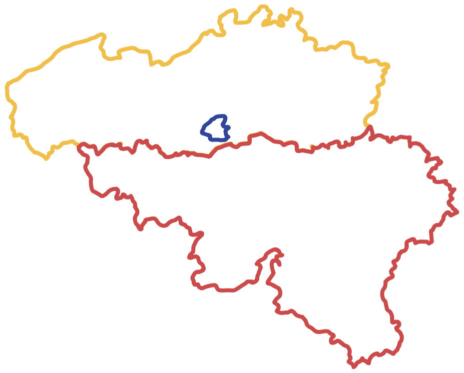
FRENCH

AGE

≤ 24 y.o.	13
25 – 34 y.o.	20
35 – 44 y.o.	20
45 – 54 y.o.	20
55 – 70 y.o.	27

ON AVERAGE
43,7 y.o.

REGION



FLANDERS: 57%

WALLONIA: 31%

BRUSSELS: 12%

The incidence rate was 86%, meaning that approximately 9 in 10 Belgians (between 18- to- 70-years-old) has made at least one online purchase in the past 12 months.

Base: *Total Sample (n=2000)*
Question: *Gender / Language / Age / Region*
Note: *Respondents were invited to partake in the survey via an online panel, which can bias the penetration.*

OVERVIEW OF PRODUCT CATEGORIES

- Books, e-books, stationery (e.g. magazines, newspapers,...)
- Music (e.g. on CD, DVD, Blu-ray, mp3, streaming via e.g. Spotify,...)
- Video (e.g. on DVD, streaming via Netflix or other providers)
- Gaming (e.g. DVD, digital on computer/smartphone, streaming, consoles, accessories,...)
- Electronics & telephony (computer, laptop, tablet, TV, smartphone, external hard disk, photo and video camera, household appliances, electro for personal care, ...)
- Telecom services (internet subscription, digital television, channel subscriptions, ...)
- Clothing, shoes and accessories (e.g. jewellery)
- Glasses and lenses
- Toys, hobby and party articles
- Office supplies
- Furniture
- Decorations and art (e.g. candles, table and bed textiles,...)
- Flowers and plants (e.g. fresh flowers, dried flowers, plants,...)
- Garden and outdoor living (e.g. garden furniture and accessories, bbq, awnings, outdoor lighting, garden decoration and tools, swimming pool, gazebo,...)
- Food and drink (e.g. general food from the supermarket, via a delivery service, meal boxes (e.g. Hello Fresh), chocolates and sweets, drinks,...)
- Health and care (e.g. personal care products, shampoo, day cream, perfume, pharmaceutical products sold without a prescription,...)
- Sports (clothing, shoes, accessories, sports electronics, sports equipment,...)
- Pet food or toys
- Travel (e.g. airline tickets, travel tickets, hotel reservations and bookings,...)
- Leisure & entertainment (e.g. restaurant reservations, tickets for events, museums,...)
- Vehicles (e.g. car, motorcycle,...)
- Bicycles and bicycle accessories
- Financial products (e.g. investment products, insurance,...)
- DIY (DIY equipment, DIY jobs, paint, tools, building materials,...)
- Second-hand (clothing, furniture, household goods,...)

Respondents were allocated to one product category they bought (mainly or only) online in the past 12 months (based on least fill), for which they answered several questions from the ‘online path to purchase’ part.

RESULTS

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INTRO

WHAT DO PEOPLE SHOP ONLINE?

ONLINE PATH TO PURCHASE

WHAT TRIGGERS PEOPLE WHEN BUYING THEIR PRODUCT ONLINE?

WHERE DO SHOPPERS SEARCH FOR INFORMATION? AND WHAT DO THEY LOOK FOR?

WHERE DO ONLINE SHOPPERS BUY? AND WHY?

WHICH PAYMENT AND SHIPPING HABITS DO PEOPLE HAVE?

WHAT PURCHASE HURDLES DO ONLINE SHOPPERS HAVE?

AD HOC

WHAT IS THE ROLE OF PLATFORMS?

HOW HAVE ONE-CLICK PAYMENT USAGE AND DATA ATTITUDES EVOLVED?

HOW IMPORTANT IS WEBSHOP ORIGIN?

TO WHAT EXTENT DO SHOPPERS CONTACT THE WEBSHOP?

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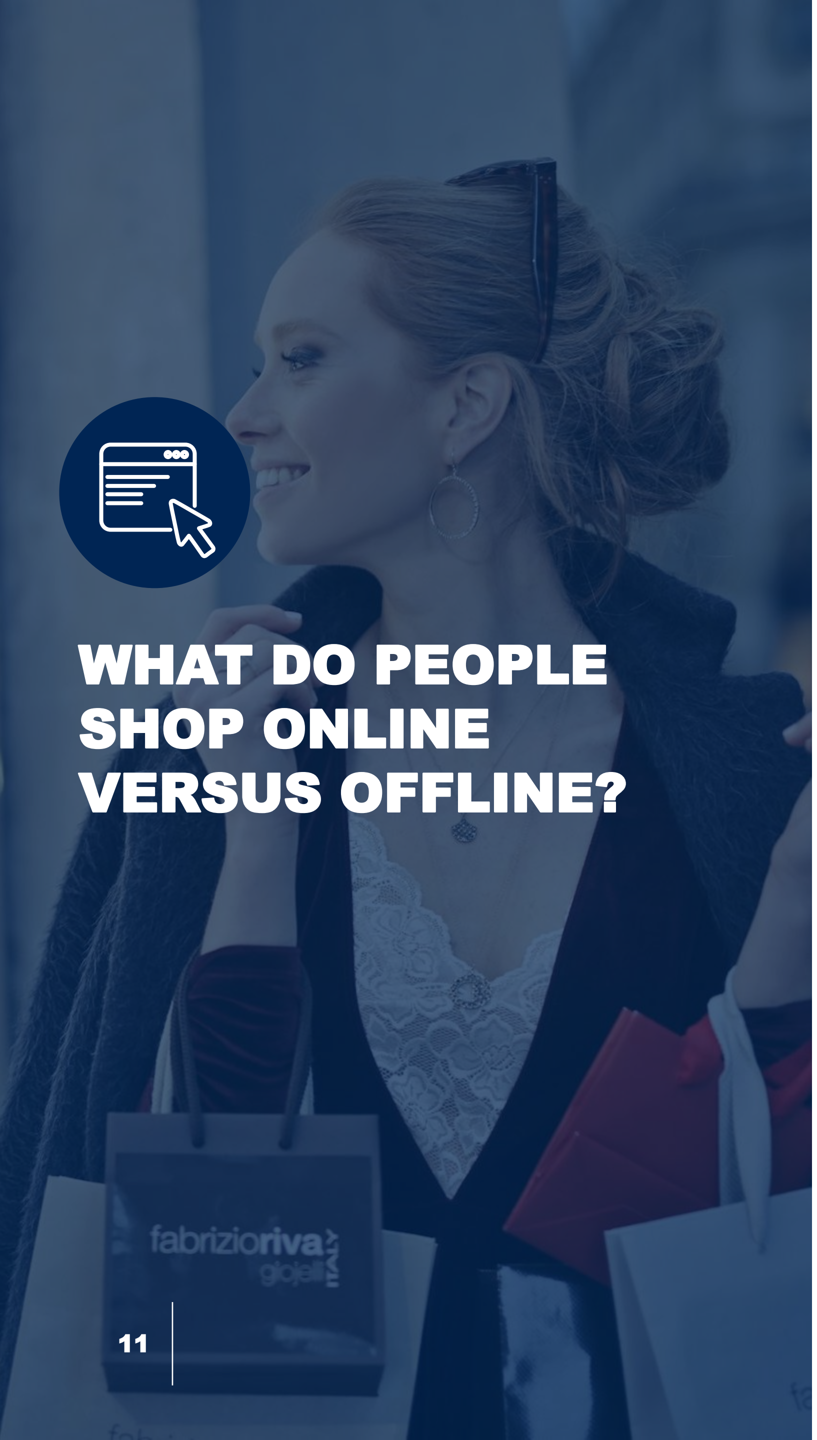


WHAT DO PEOPLE SHOP ONLINE VERSUS OFFLINE?

CLEAR PREFERENCES ON WHICH PRODUCTS TO BUY IN A PHYSICAL STORE AND WHICH ONES ONLINE

- Again, nearly all Belgians shop online for at least one category and their profile remains stable and close to national representative figures.
- Little differences compared to 2023 in terms of top online bought categories (travel, leisure and fashion remain on top).
- Lowest online share and lowest consideration to buy online for bicycles, vehicles, spectacles & lenses and flowers & plants, in line with last year.
- Hobby, party & toys as well as food and drinks seem to be purchased less online now than during the last wave.

TANGIBILITY REMAINS KEY TO BUY OFFLINE CONVENIENCE, AVAILABILITY AND PRICE PUSH ONLINE

- The offline experience of feeling, seeing, holding and testing products, whether combined with advice, still convinces Belgians to shop in a physical store.
- The share of Belgians shopping online because of habit (20%) is higher compared to last wave, suggesting a larger part of the population stays online for certain product categories.

9 IN 10

of 18- to 70-year-olds has bought online in the past 12 months

WHAT PRODUCTS DO ONLINE SHOPPERS PURCHASE, AND HOW?

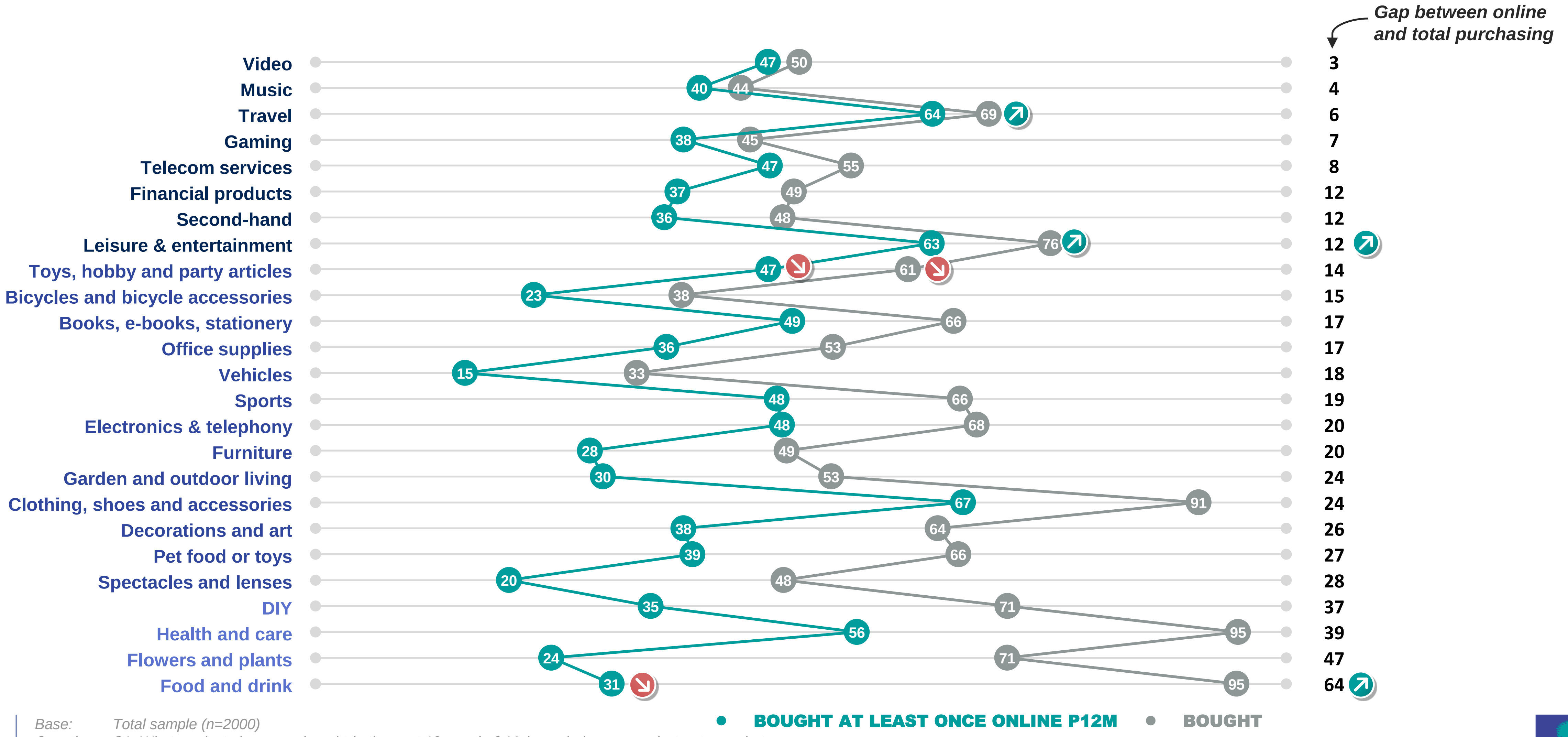
BIG GAP BETWEEN ONLINE AND TOTAL PURCHASING → SMALL GAP

E-COMMERCE HAS HIGHEST PENETRATION GROWTH POTENTIAL IN THESE CATEGORIES	MODERATE TO HIGH PENETRATION INCREASE POSSIBLE	E-COMMERCE IS FULLY EMBEDDED IN THESE CATEGORIES
DIY	Toys, hobby and party articles	Video
Health and care	Bicycles and bicycle accessories	Music
Flowers and plants	Books, e-books, stationery	Travel
Food and drink	Office supplies	Gaming
	Vehicles	Telecom services
	Sports	Financial products
	Electronics & telephony	Second-hand
	Furniture	Leisure & entertainment
	Garden and outdoor living	
	Clothing, shoes and accessories	
	Decorations and art	
	Pet food or toys	
	Spectacles and lenses	

Base: Total sample (n=2000)
Question: S1. What products have you bought in the past 12 months? Make a choice per product category between: only bought in the store, mainly bought in the store, mainly bought online, only bought online or did not buy.

WHAT PRODUCTS DO ONLINE SHOPPERS PURCHASE, AND HOW?

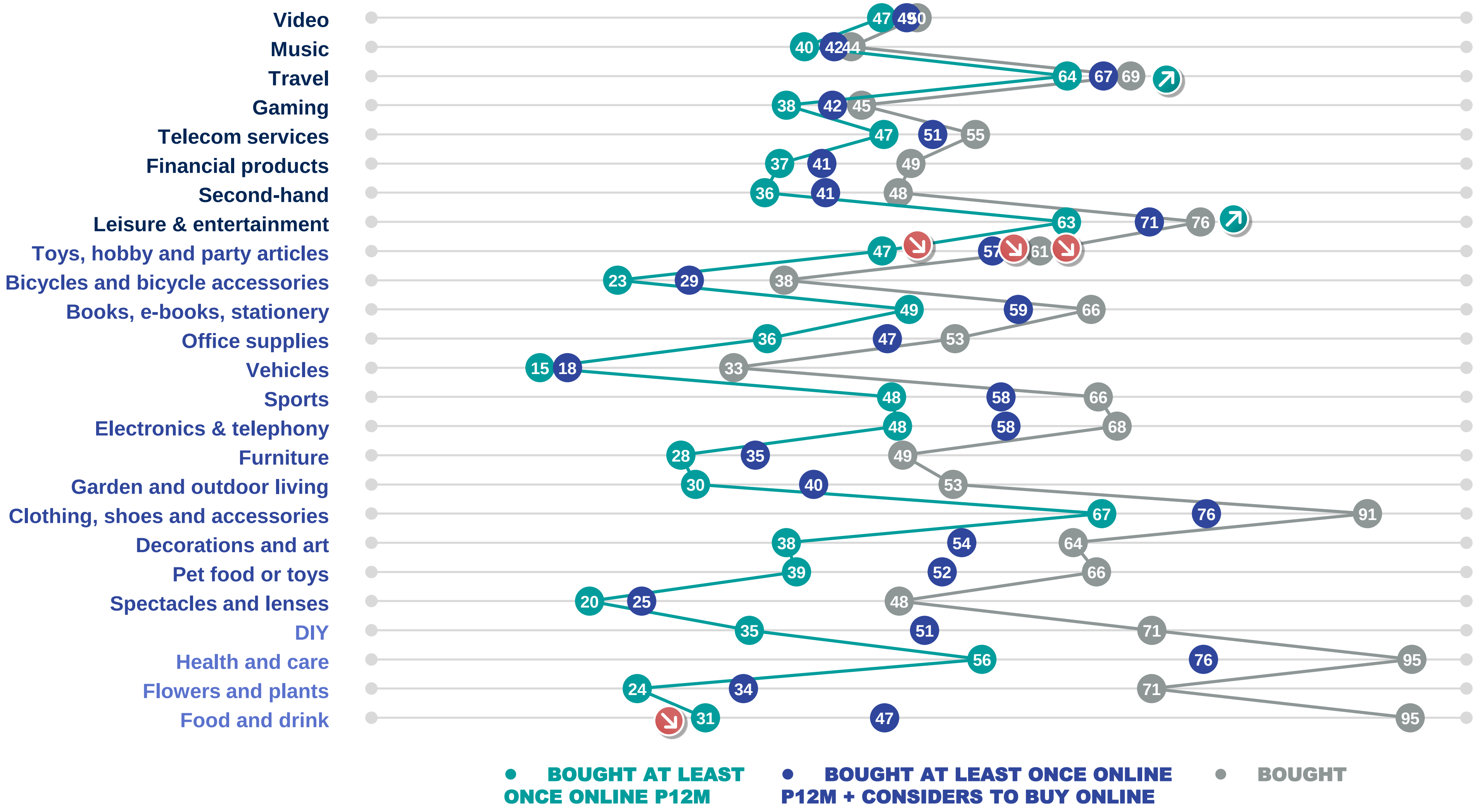
Health and care, food and drink, as well as fashion are still bought most frequently (either online or offline). When examining online consumption, travel, leisure & fashion remain on top. Online consumption of toys, hobby & party articles and food and drink has decreased since last wave.



Base: Total sample (n=2000)
Question: S1. What products have you bought in the past 12 months? Make a choice per product category between: only bought in the store, mainly bought in the store, mainly bought online, only bought online or did not buy.

The gap between online and total purchasing is smaller among younger shoppers (18 to 34) for most categories.

WHAT PRODUCTS DO ONLINE SHOPPERS PURCHASE, AND HOW? + CONSIDERATION

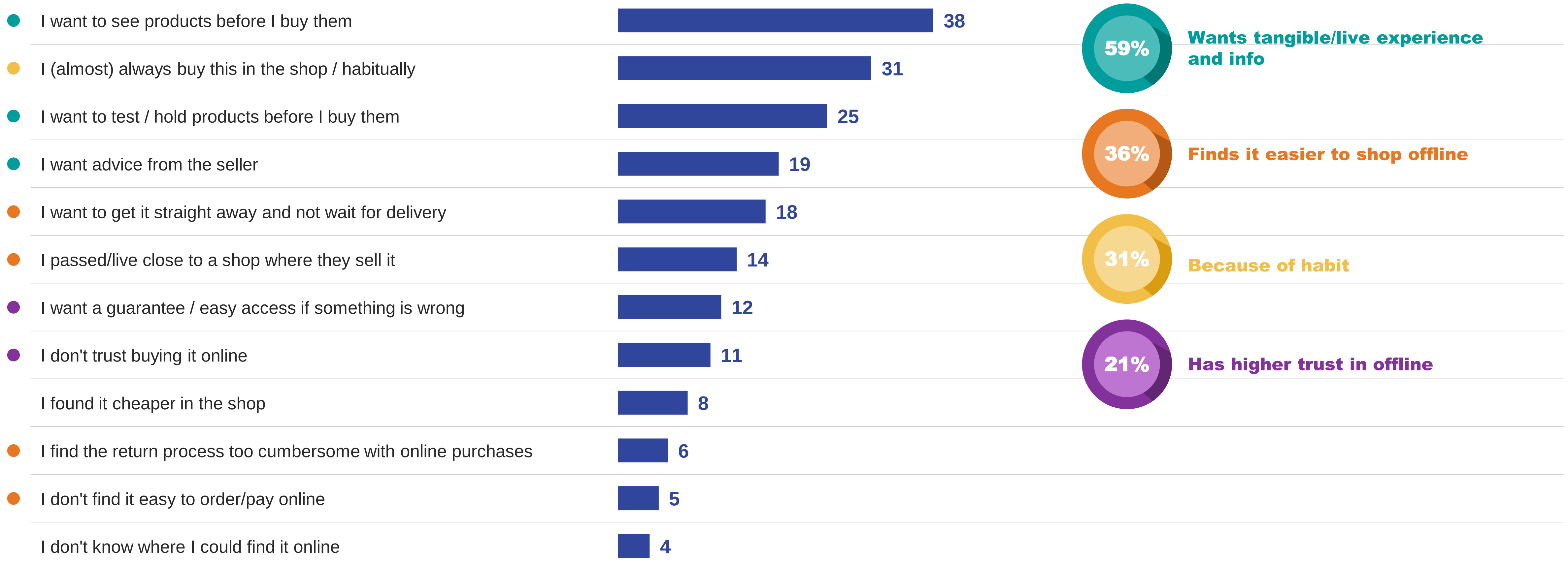


Base: Total sample (n=2000)

Question: S1. What products have you bought in the past 12 months? Make a choice per product category between: only bought in the store, mainly bought in the store, mainly bought online, only bought online or did not buy.
Q2. You indicated that you buy the products below only in shops (not online). Would you consider buying these online as well?

WHY DO SHOPPERS BUY OFFLINE?

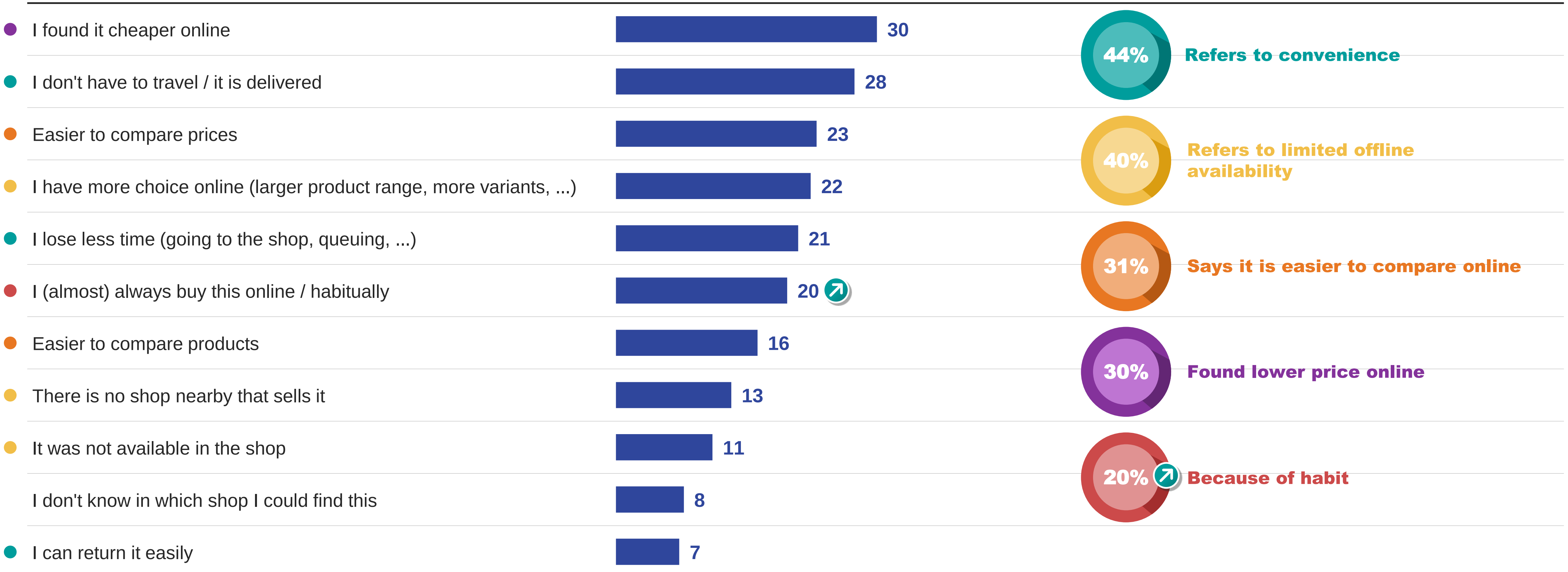
The most important reason for shoppers to buy offline rather than online remains the need for tangible information. Offline purchases are driven by a need or want to test or hold products, as well as getting advice. The habit of shopping offline carries on.



Base: Total Sample (n=4868) (Response level: respondent evaluated more than one product category)
Question: Q1. You have only purchased the product below in a physical store. Why didn't you buy this online?

WHY DO SHOPPERS BUY ONLINE?

Several drivers to shop online persist. Convenience in terms of travel time and losing less time for example. Limited offline availability as a driver to go online continues to exist as well as cheaper prices. The habit of buying online increases over time.



Base: Total Sample (n=2000)
Question: Q4. Why did you buy this online and not in a physical store?

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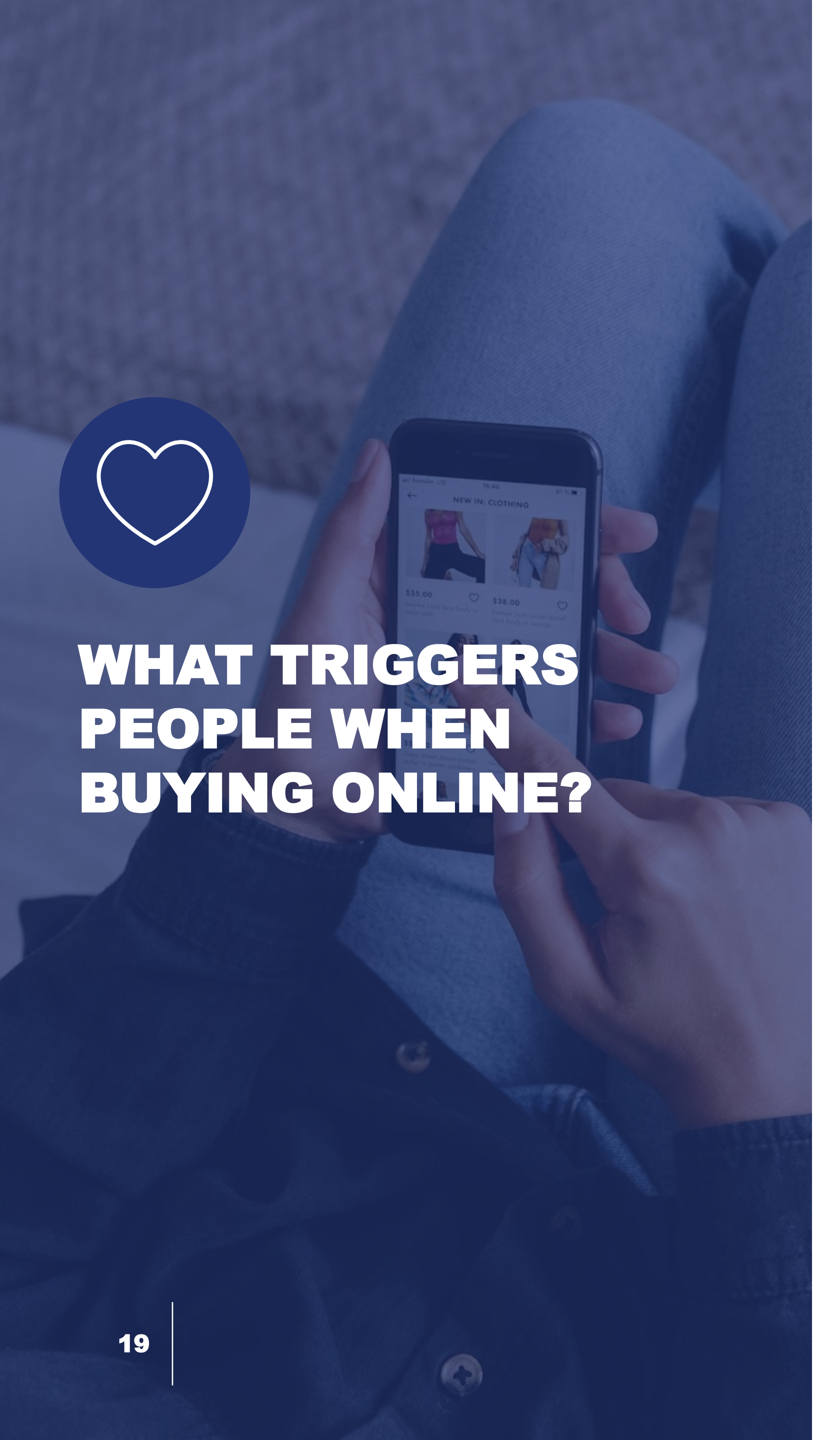


WHAT TRIGGERS PEOPLE WHEN BUYING ONLINE?

MAJORITY OF ONLINE PURCHASES STEM FROM A NEED

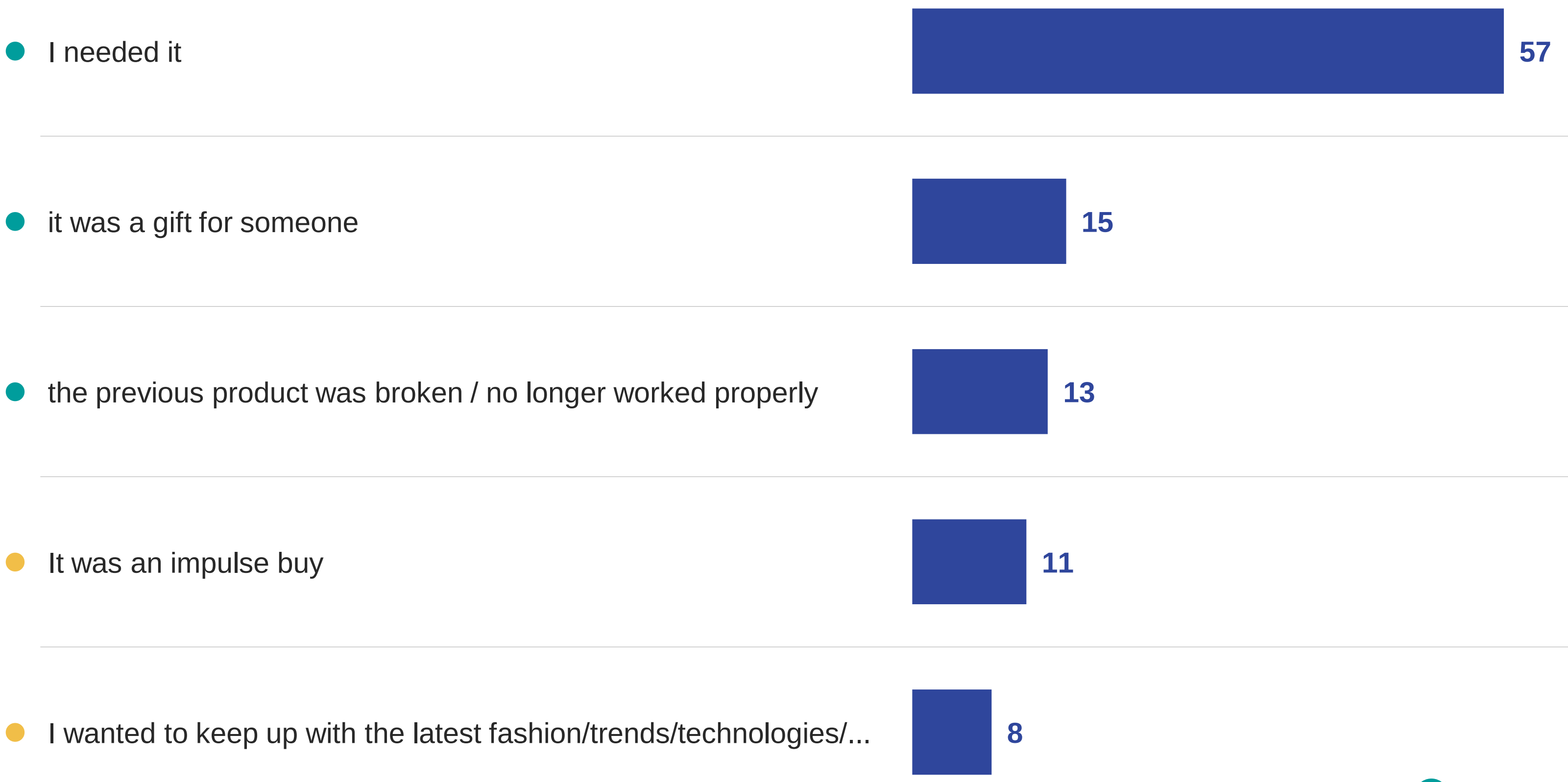
- Close to 8 in 10 online purchases were initiated because of an internal or personal trigger.
- Again, this is especially the case for electronics, toys/hobby/party goods, office supplies and pet products.
- Younger shoppers are more often triggered because of a want.
- Purchases initiated from a want are more prevalent in fashion, decoration, gaming and music.

NOT MANY ARE INSPIRED BY OTHERS BUT IF SO, THEN ESPECIALLY FRIENDS & FAMILY ARE OF INFLUENCE

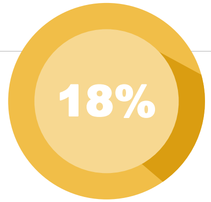
- Nearly 4 in 10 got inspired by others, primarily driven by friends and family, as well as advertising
- Inspiration is much more prevalent among younger shoppers, making this group more open to persuasion. The lower the age, the lower the share saying they did not get inspired.

WHAT TRIGGERS ONLINE SHOPPERS TO BUY?

Almost 4 in 5 Belgian online shoppers initiated their last purchase because of a need. These purchases are mostly driven by having needed the product or service. The rest of the purchases, 1 in 5 were triggered because of a want, namely impulsively or in keeping up with the latest trends.



Was triggered because of a need



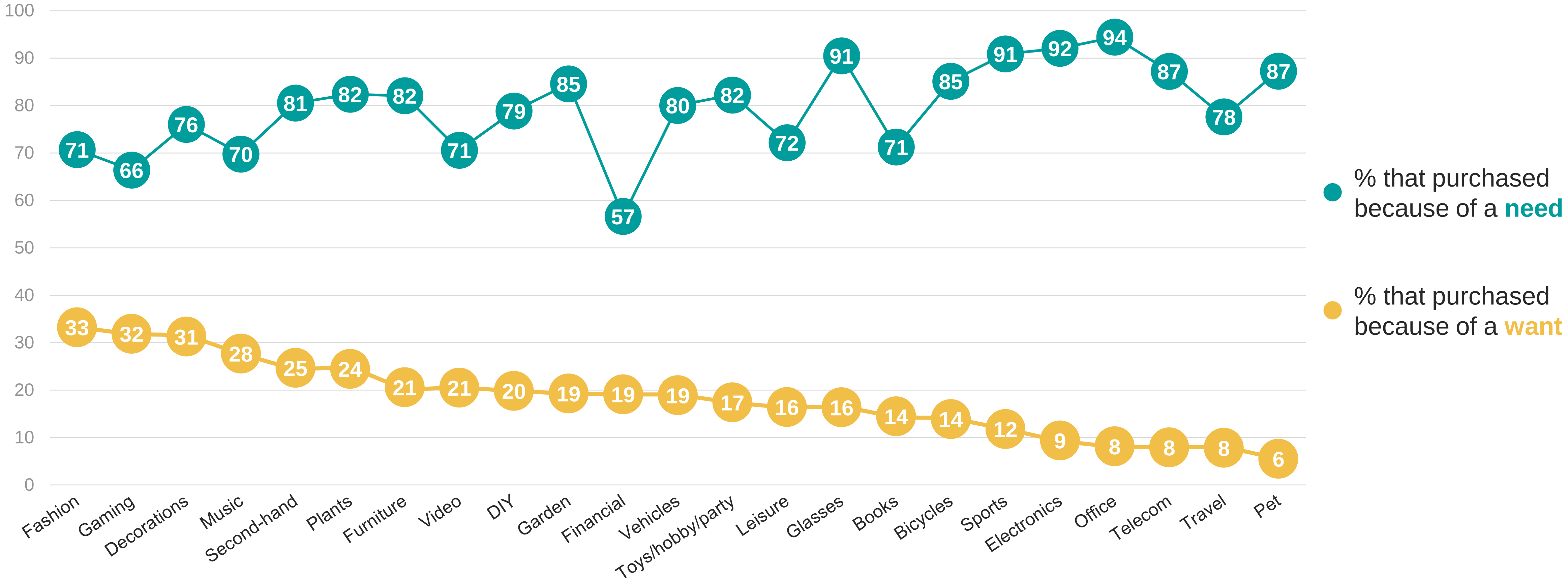
Was triggered because of a want

Share of those triggered by a want is higher among younger shoppers. The younger the shopper, the higher the share. 27% of 18–24-year-olds *(n=237)* purchased because of a want versus 12% of elderly shoppers *(n=489)*.

Base: Total Sample, excl. those allocated to the product categories 'food and drinks' and 'health and care' (n=1842)
Question: Q3. Think back to your last online purchase of the product below. Why did you purchase this at that time?
Note: Question was asked with regards to specific product category, except for 'food and drink' and 'health and care'
No evolution, question changed significantly compared to last wave

WHAT TRIGGERS ONLINE SHOPPERS TO BUY, DEPENDING ON PRODUCT CATEGORY?

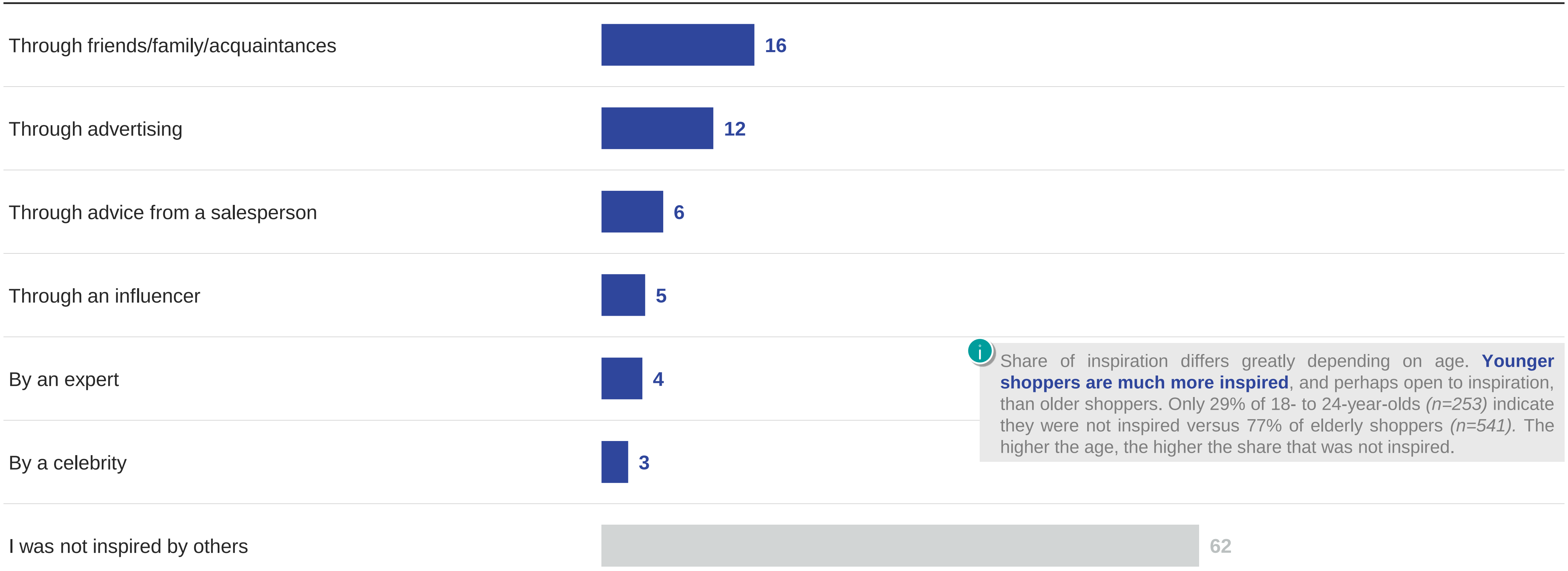
Most products are persistently more bought because of a need, especially music, gaming, vehicles, books, video, plants, sports-related products and glasses. Product categories most open to persuasion are fashion, gaming, decorations and music.



Base: Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months)
Question: Q3. Think back to your last online purchase of the product below. Why did you purchase this at that time?
Note: Question was not asked for product categories 'food and drink' and 'health and care'

TO WHAT EXTENT ARE SHOPPERS INSPIRED TO BUY BECAUSE OF OTHERS?

The majority was not inspired by something or someone.
If Belgian online shoppers were inspired, it is mainly coming from friends, family and acquaintances or through advertising.

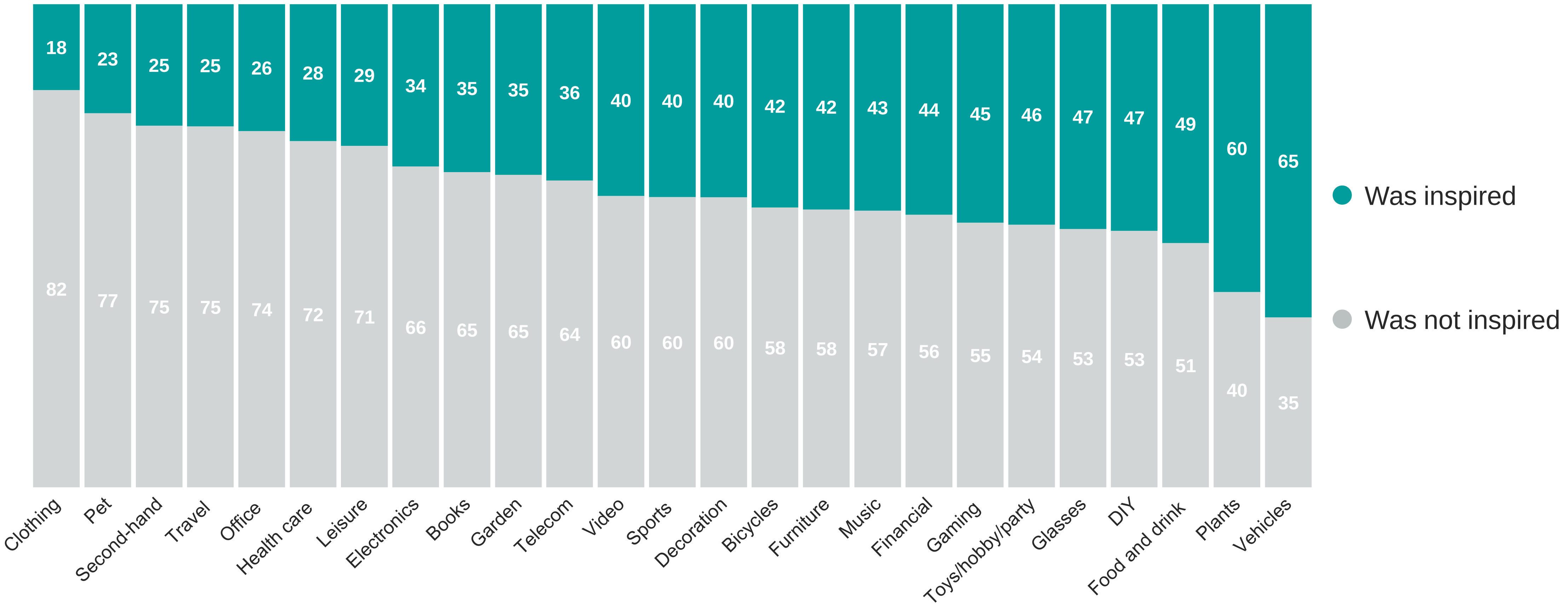


Share of inspiration differs greatly depending on age. **Younger shoppers are much more inspired**, and perhaps open to inspiration, than older shoppers. Only 29% of 18- to 24-year-olds *(n=253)* indicate they were not inspired versus 77% of elderly shoppers *(n=541).* The higher the age, the higher the share that was not inspired.

Base: *Total Sample (n=2000)*
Question: *Q3a. Were you inspired to buy this because of others?*
Note: *Question was asked with regards to specific product category, except for 'food and drink' and 'health and care'*

TO WHAT EXTENT ARE SHOPPERS INSPIRED TO BUY BECAUSE OF OTHERS?

Clothing, pet food, second-hand, travel and office are least inspiration prone. For these categories, there is a high share of shoppers that say they were not inspired by others. For purchases of vehicles and plants, inspiration is higher.



Base: Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months)
Question: Q3a. Were you inspired to buy this because of others?

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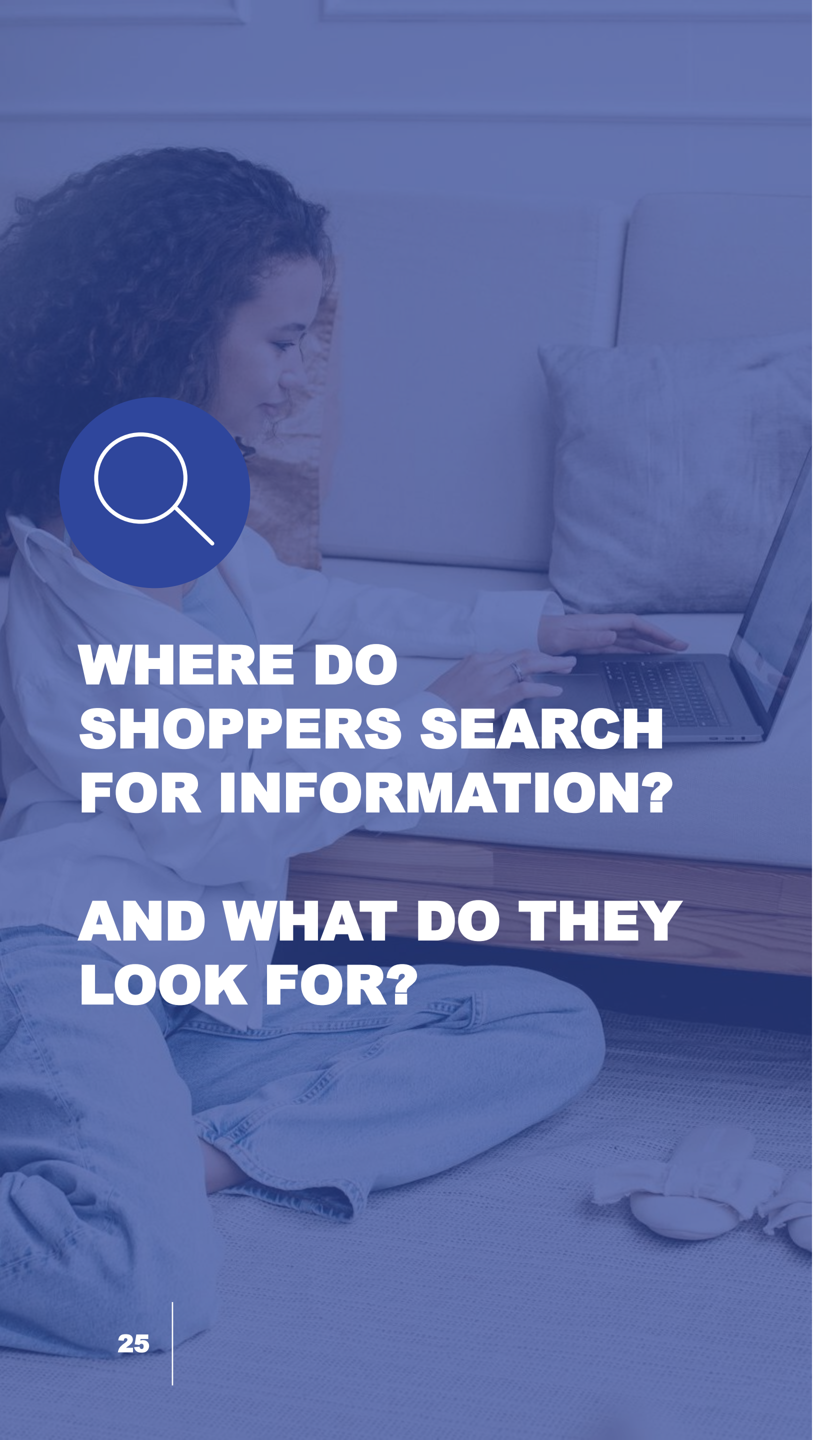


WHERE DO SHOPPERS SEARCH FOR INFORMATION?

AND WHAT DO THEY LOOK FOR?

MAJORITY STILL SEARCHES FOR INFORMATION, BUT DECREASING OVER TIME

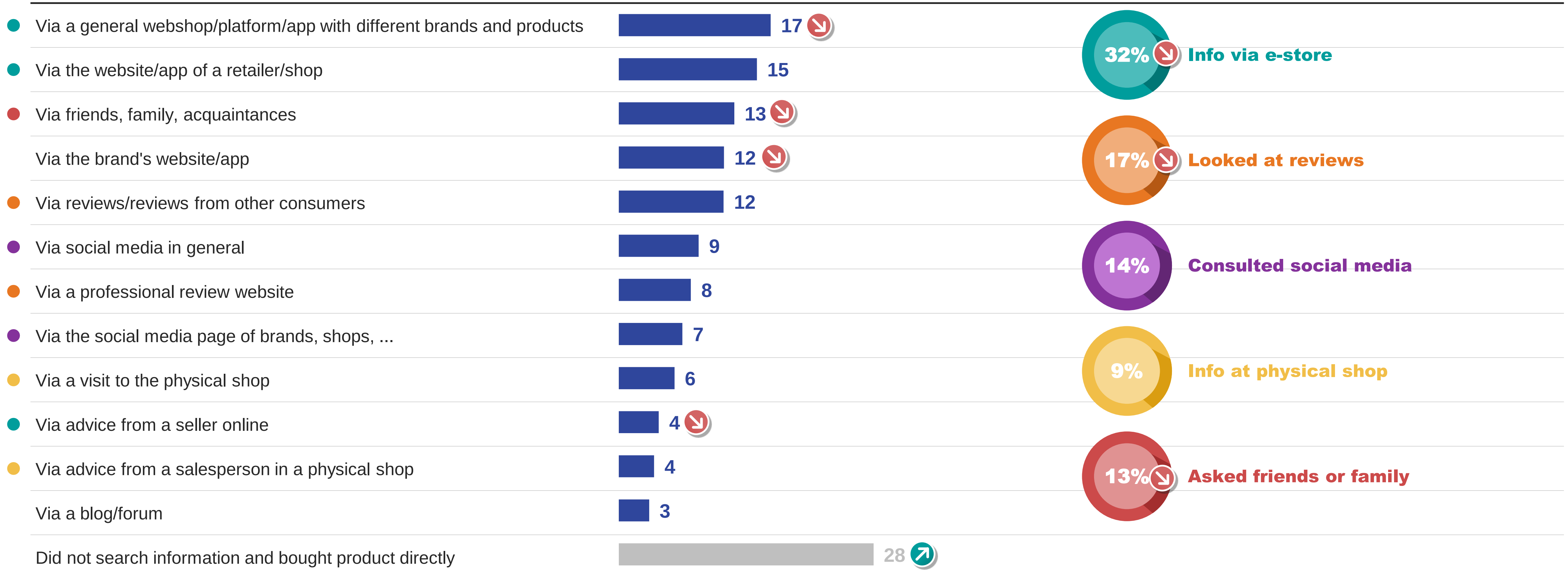
- The share of Belgians searching for information when making their last online purchase decreases over time. This decrease is specifically the case for video, travel, gaming, financial products and bicycles.
- Info is still most searched for via the webshop of the store itself. Many search for product or price information.
- In case people want to buy something, they don't buy often, about 1 in 4 would first do a general internet search.

PHYSICAL SHOP IS STILL VALUABLE

- 1 in 10 visited a physical shop before they made their purchase online.
- The ease of returning online decreases as a driver to switch from offline to online purchases.
- Yet, prices being too high in the physical store as well as easy comparison online, convinces shoppers to purchase online.
- Still 1 in 4 online shoppers would first visit a physical shop when they want to buy something they do not purchase often.

TO WHAT EXTENT DO ONLINE SHOPPERS SEARCH FOR INFORMATION, AND HOW?

There is an increase in people who did not search for information (20% in 2023) before buying their products but still, slightly more than 7 in 10 does. The e-store is still the main source of information but consulted less than before. Reviews are also consulted slightly less as a source of information before making a purchase.



Base: Total Sample (n=2000)
Question: Q5. How did you gather information for this purchase?
Note: Question was asked with regards to specific product category

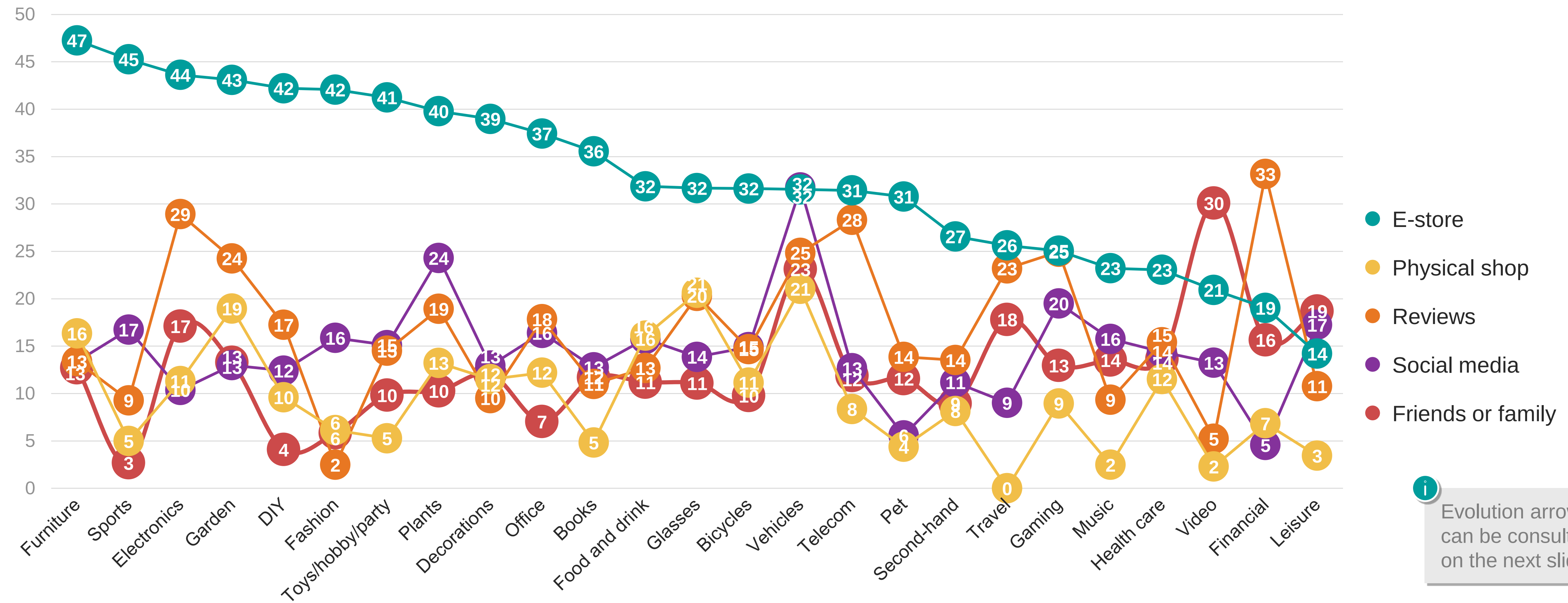
TO WHAT EXTENT DO ONLINE SHOPPERS SEARCH FOR INFORMATION, DEPENDING ON PRODUCT CATEGORY?

Need for information decreased for video, travel, gaming, financial products and bicycles.
The need for information stays highest for furniture, electronics and vehicles.

Base: Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months)
Question: Q5. How did you gather information for this purchase?

HOW DO ONLINE SHOPPERS SEARCH FOR INFORMATION, PER PRODUCT TYPE?

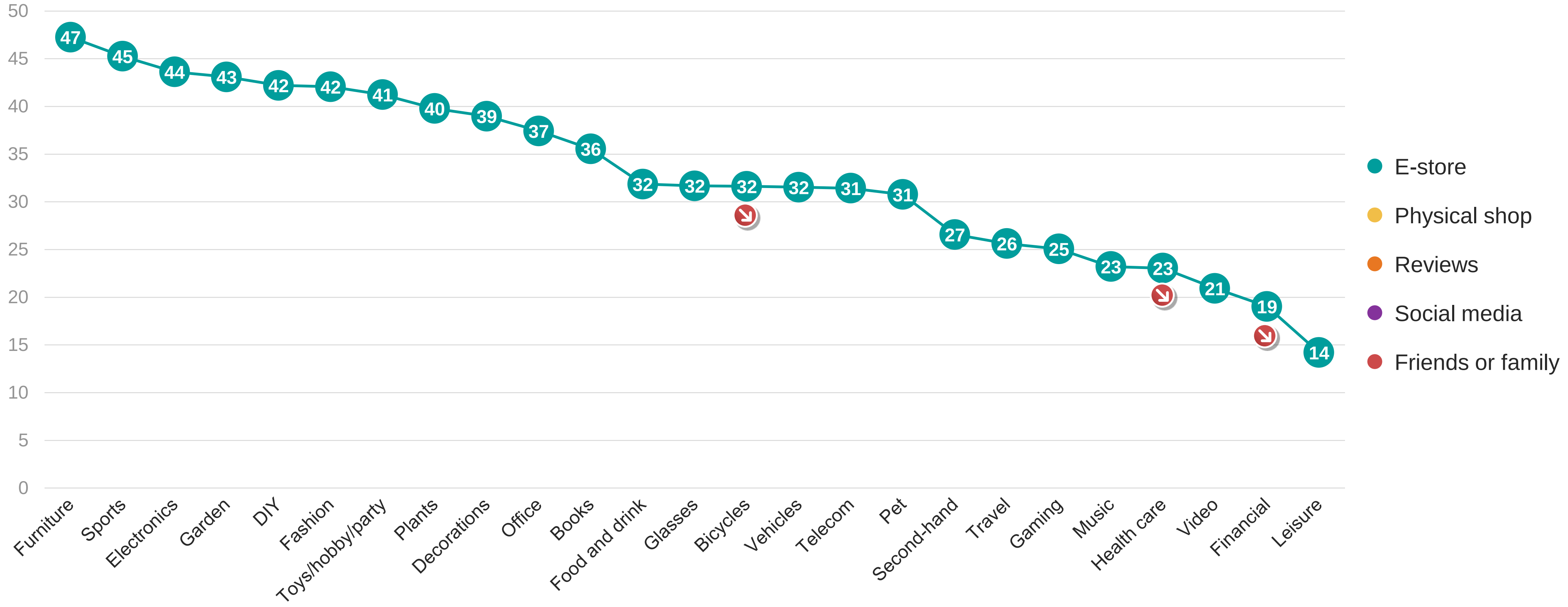
Information is generally gathered more through e-store but video is more consulted via friends & family, while reviews are more important for financial products. E-store does now appear to be less important for bicycles, health care & financial and reviews have also declined in importance for clothing purchases. In addition, friends and family are also less consulted before purchasing sport related items.



Evolution arrows can be consulted on the next slides.

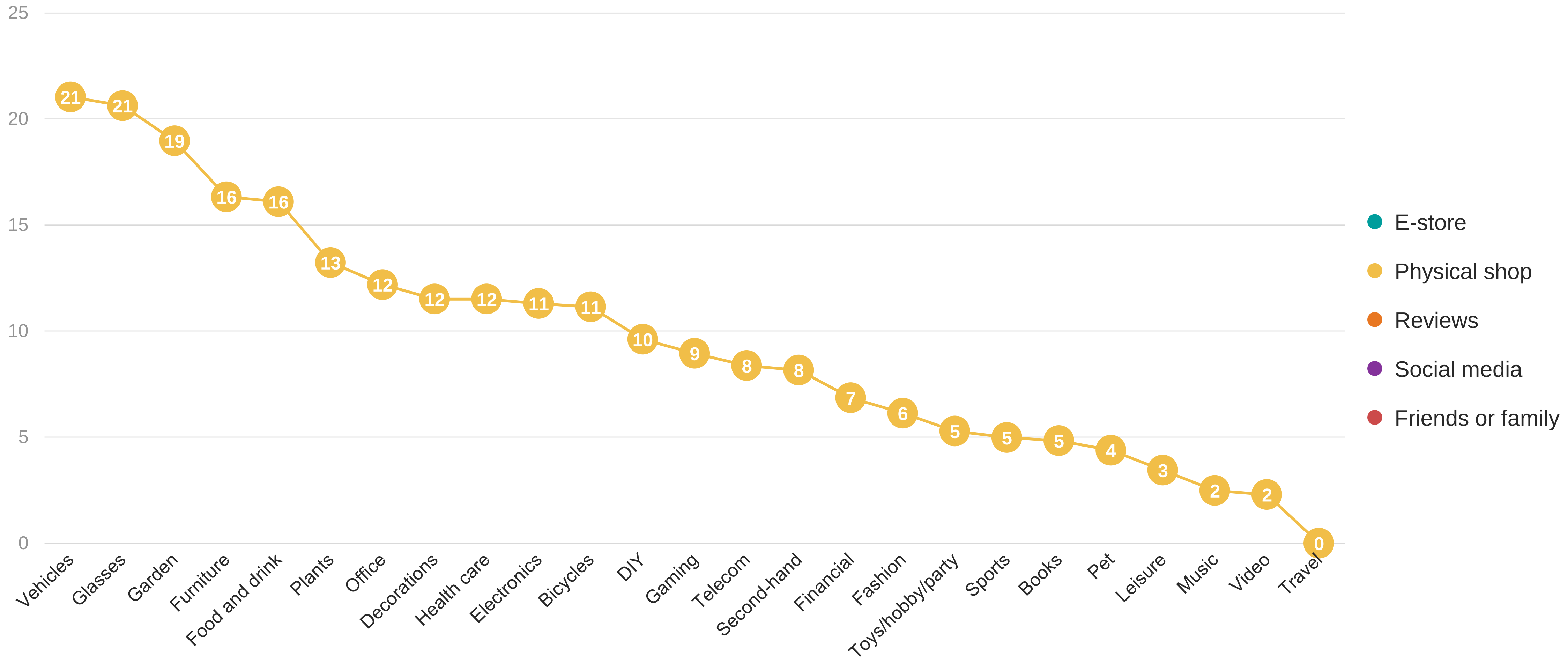
Base: Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)
Question: Q5. How did you gather information for this purchase?

HOW DO ONLINE SHOPPERS SEARCH FOR INFORMATION, PER PRODUCT TYPE? – FOCUS ON E-STORE



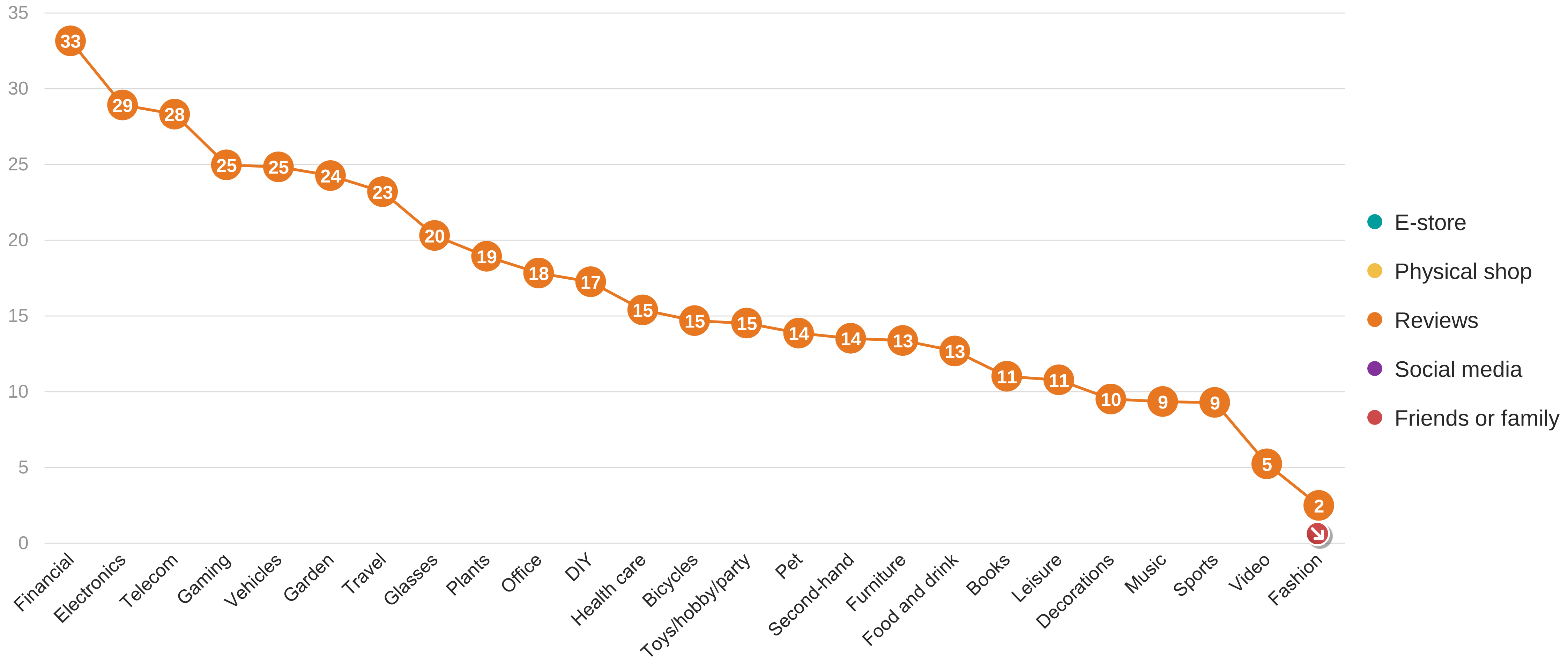
Base: Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)
Question: Q5. How did you gather information for this purchase?

HOW DO ONLINE SHOPPERS SEARCH FOR INFORMATION, PER PRODUCT TYPE? – FOCUS ON PHYSICAL SHOP



Base: Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months)
Question: Q5. How did you gather information for this purchase?

HOW DO ONLINE SHOPPERS SEARCH FOR INFORMATION, PER PRODUCT TYPE? – FOCUS ON REVIEWS



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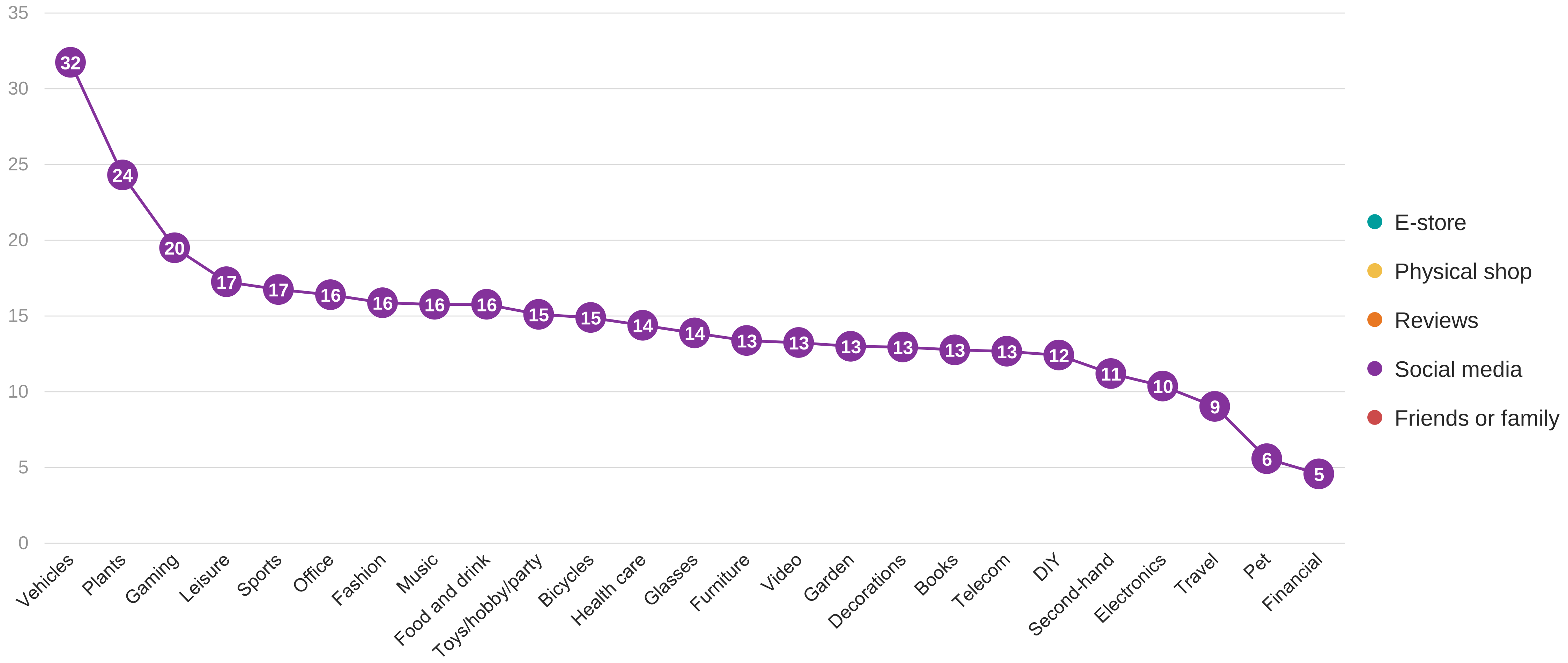
Question: Q5. How did you gather information for this purchase?

HOW DO ONLINE SHOPPERS SEARCH FOR INFORMATION, PER PRODUCT TYPE? – FOCUS ON SOCIAL MEDIA



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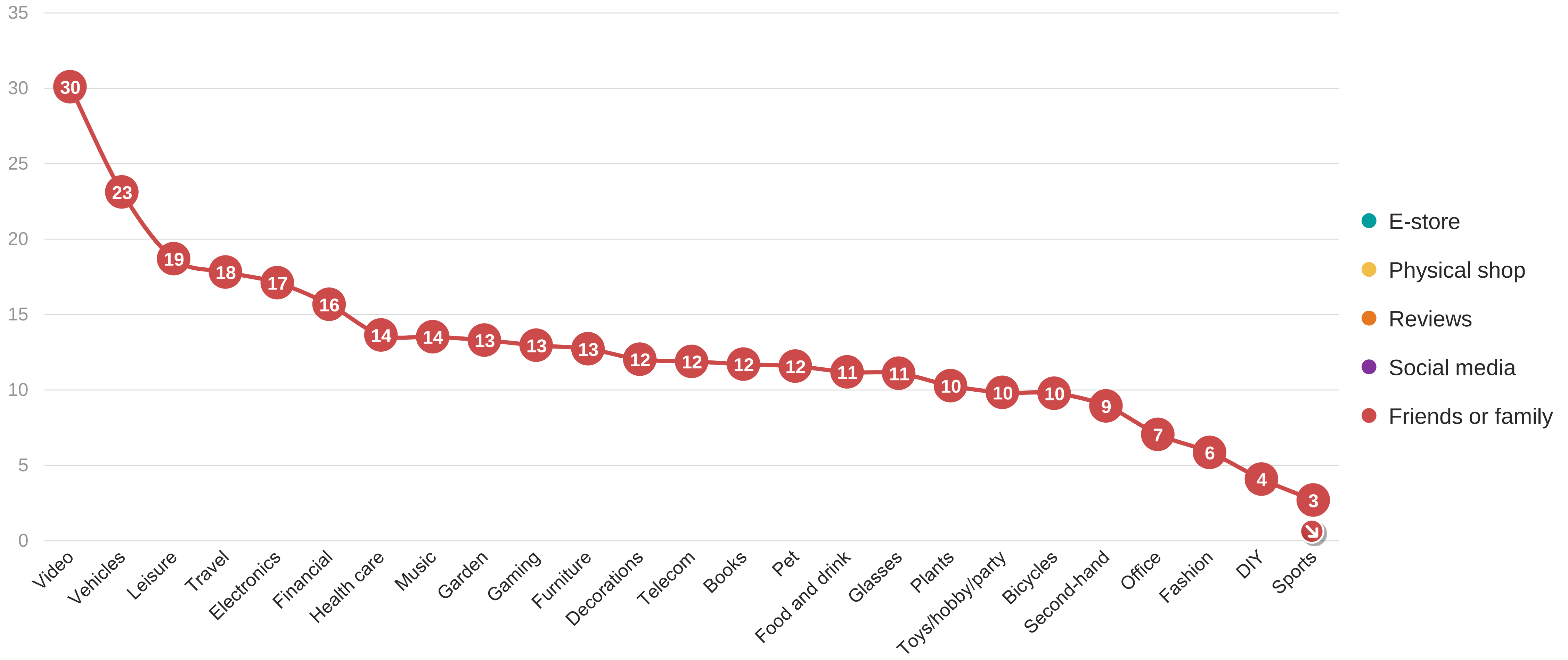
Question: Q5. How did you gather information for this purchase?

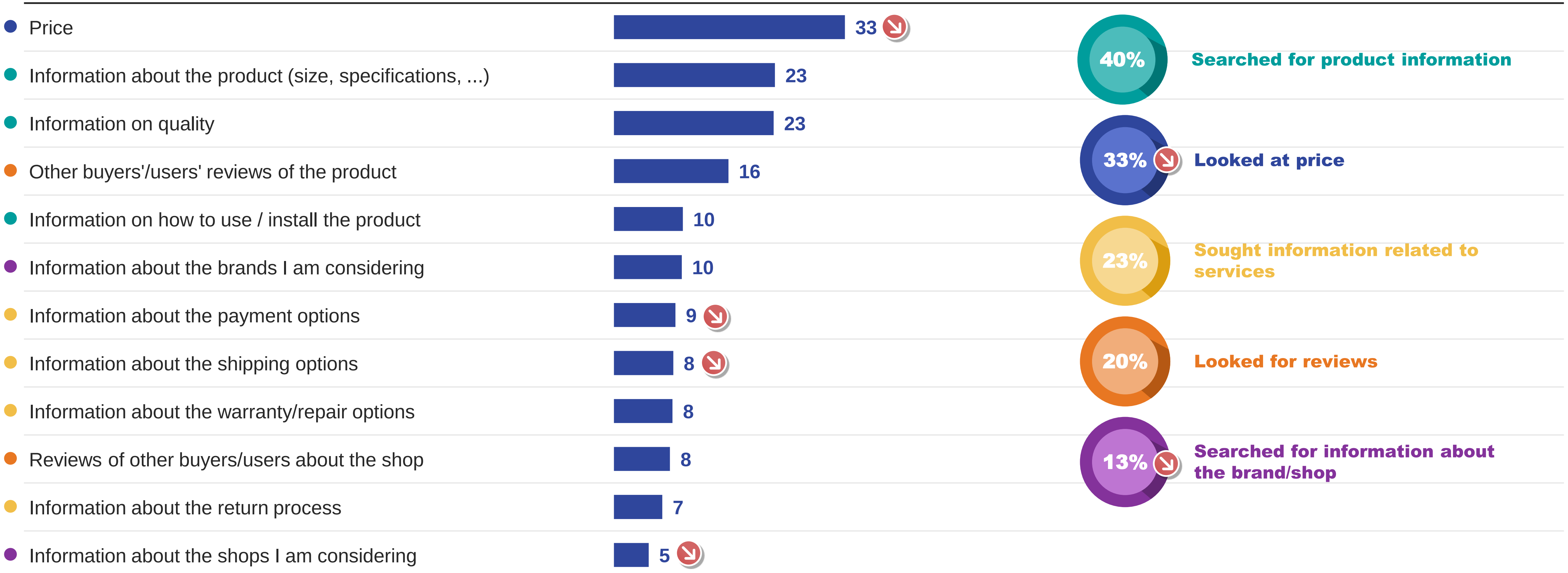
HOW DO ONLINE SHOPPERS SEARCH FOR INFORMATION, PER PRODUCT TYPE? – FOCUS ON FRIENDS OR FAMILY



Base: Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)
Question: Q5. How did you gather information for this purchase?

WHAT TYPE OF INFORMATION DO ONLINE SHOPPERS CONSULT?

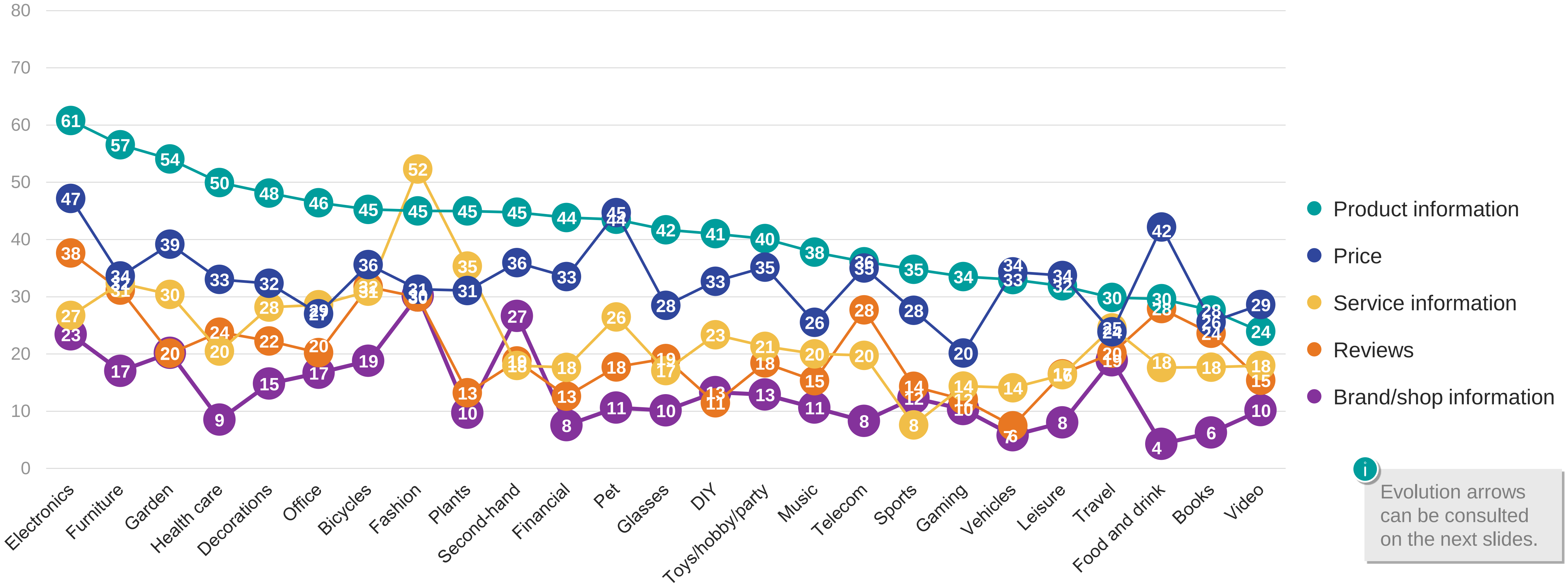
Product information is still most searched for, with 2 in 5 having looked at either product information, product quality or usage/installation instructions. Price is also still the second most frequently consulted, with 1 in 3. Information related to service, on the other hand, was again third most consulted by almost 1 in 4. Reviews are still important as well, with 1 in 5 having looked at either product or shop reviews.



Base: Total Sample (n=2000)
Question: Q6. What kind of information were you looking for?
Note: Question was asked with regards to specific product category

WHAT TYPE OF INFORMATION DO ONLINE SHOPPERS CONSULT, DEPENDING ON PRODUCT TYPE?

The search for price information about toys/hobby/party and music has decreased. Reviews are now less searched for with regards to leisure, and service information for pet products. Information about the shop is now less sought after for travel.



Evolution arrows can be consulted on the next slides.

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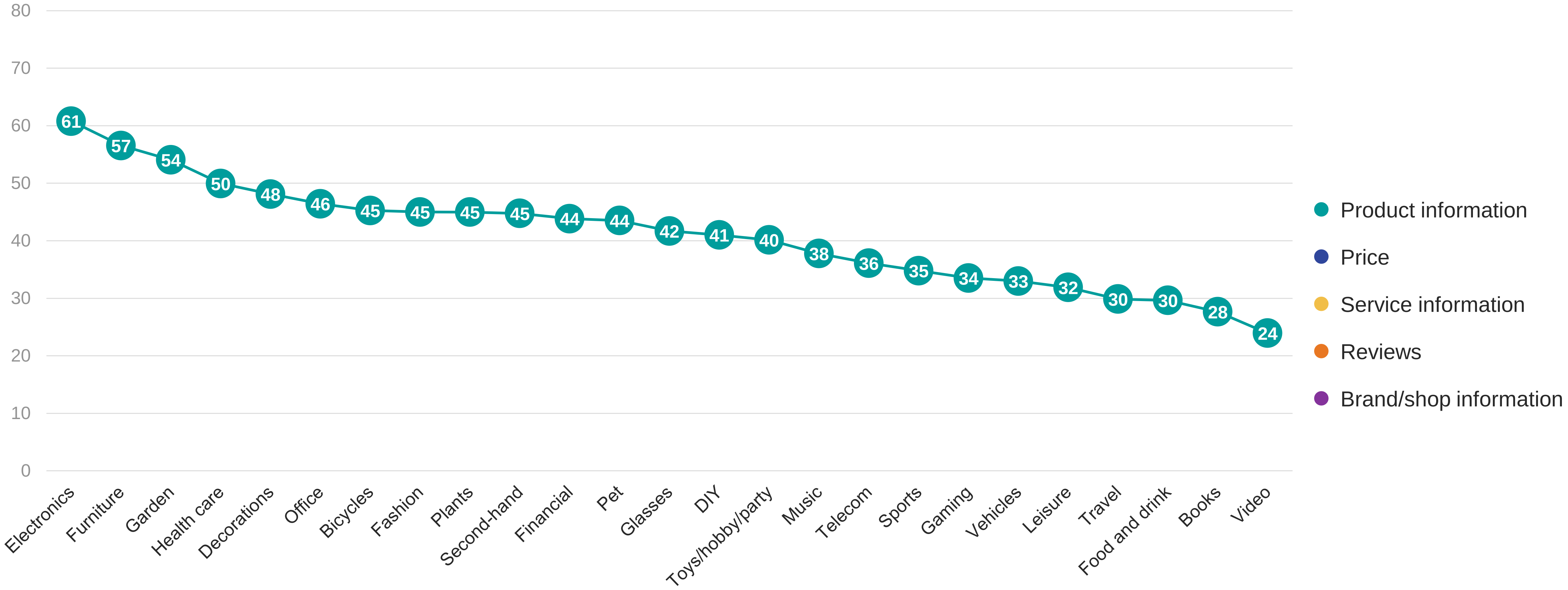
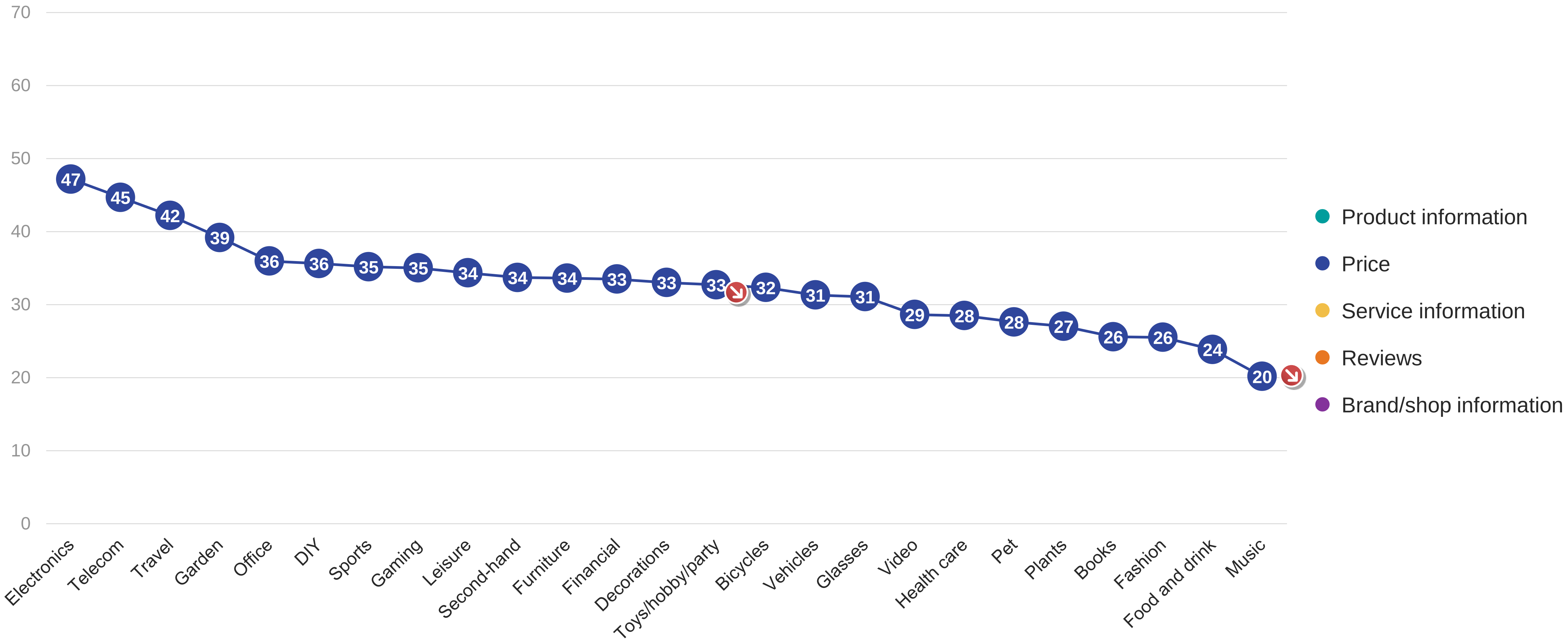
WHAT TYPE OF INFORMATION DO ONLINE SHOPPERS CONSULT, DEPENDING ON PRODUCT TYPE? – FOCUS ON PRODUCT INFORMATION



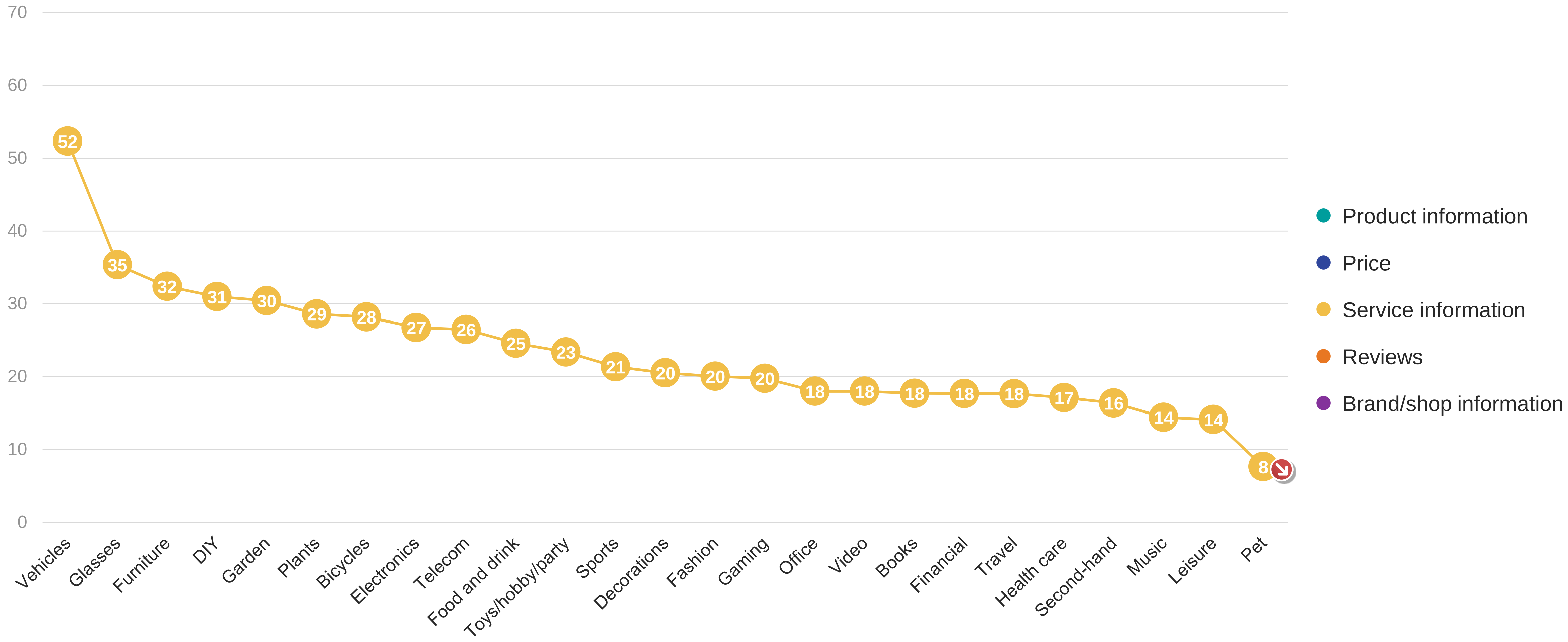
Base: Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)
Question: Q6. What kind of information were you looking for?

WHAT TYPE OF INFORMATION DO ONLINE SHOPPERS CONSULT, DEPENDING ON PRODUCT TYPE? – FOCUS ON PRICE



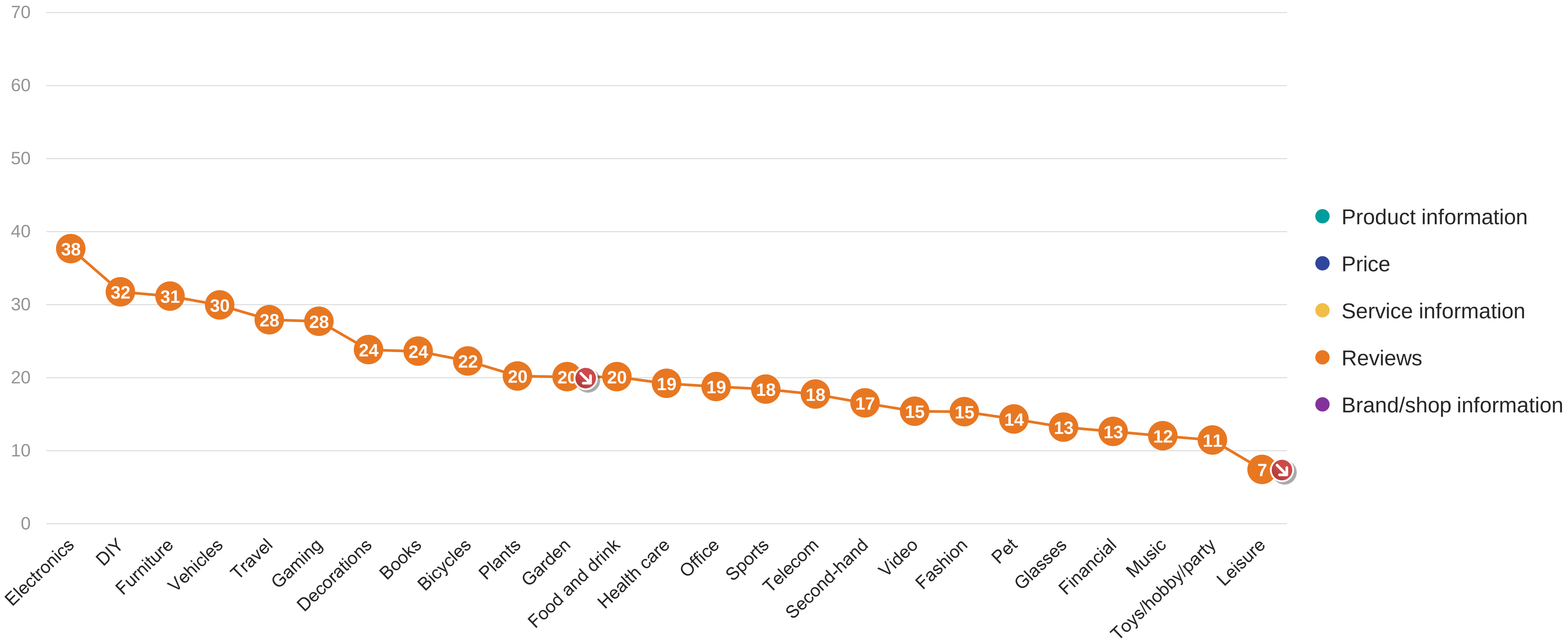
Base: Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)
Question: Q6. What kind of information were you looking for?

WHAT TYPE OF INFORMATION DO ONLINE SHOPPERS CONSULT, DEPENDING ON PRODUCT TYPE? – FOCUS ON SERVICE INFORMATION



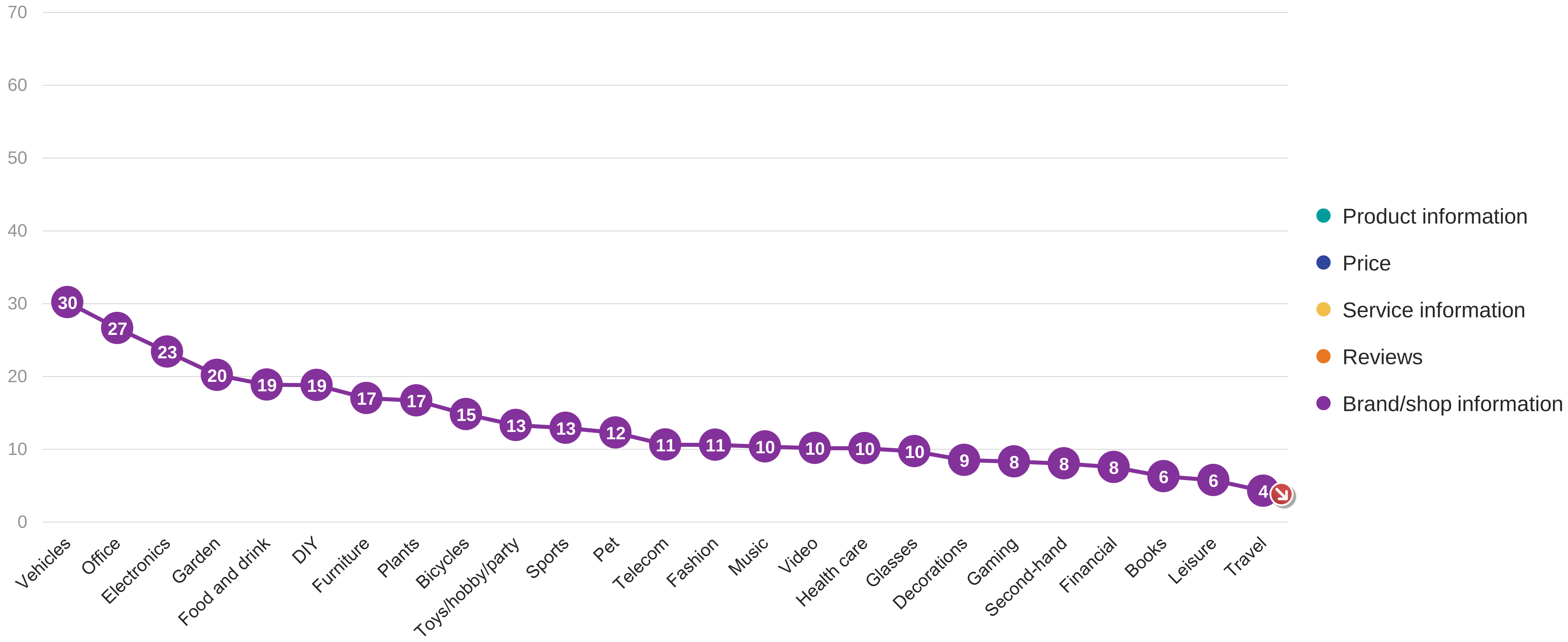
Base: Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)
Question: Q6. What kind of information were you looking for?

WHAT TYPE OF INFORMATION DO ONLINE SHOPPERS CONSULT, DEPENDING ON PRODUCT TYPE? – FOCUS ON REVIEWS



Base: Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)
Question: Q6. What kind of information were you looking for?

WHAT TYPE OF INFORMATION DO ONLINE SHOPPERS CONSULT, DEPENDING ON PRODUCT TYPE? – FOCUS ON BRAND/SHOP INFORMATION

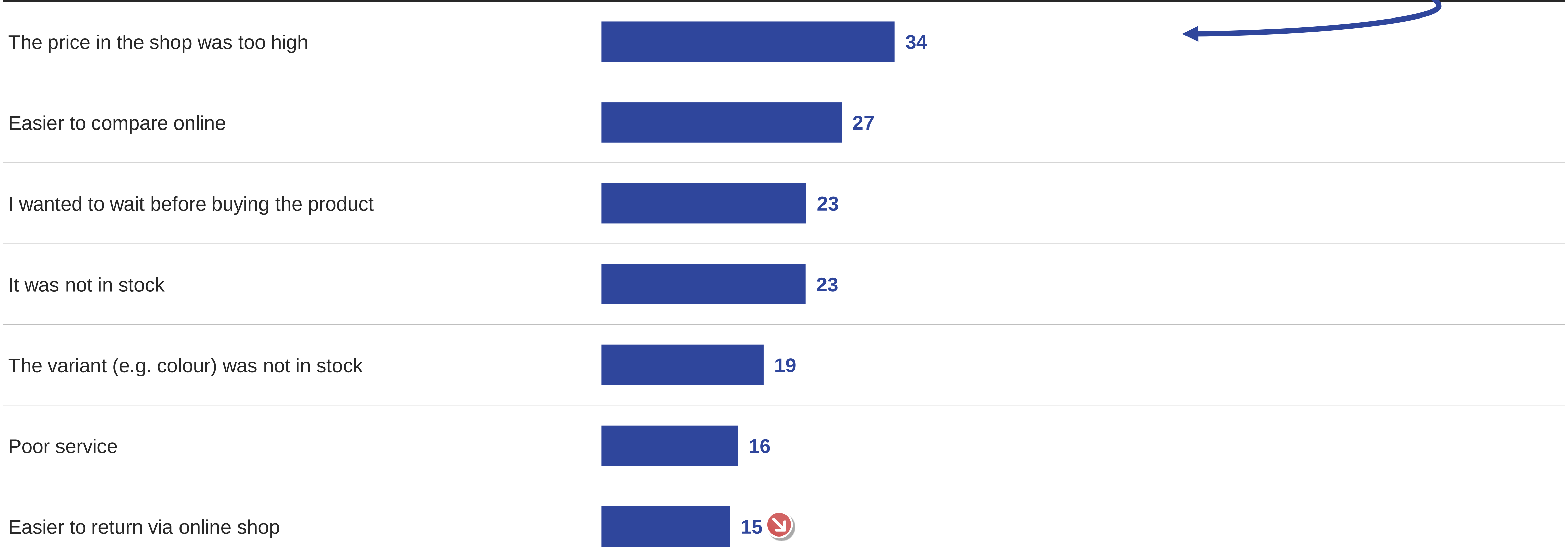


Base: *Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)*
Question: *Q6. What kind of information were you looking for?*

WHY DO ONLINE SHOPPERS NOT BUY IN THE PHYSICAL SHOP?

The price in a shop has become the biggest reason for visiting the shop but not buying there for slightly more than 1 in 3, but also easier comparison online remains a big driver. The ease of online returns, on the other hand, has declined in importance (15% in 2023).

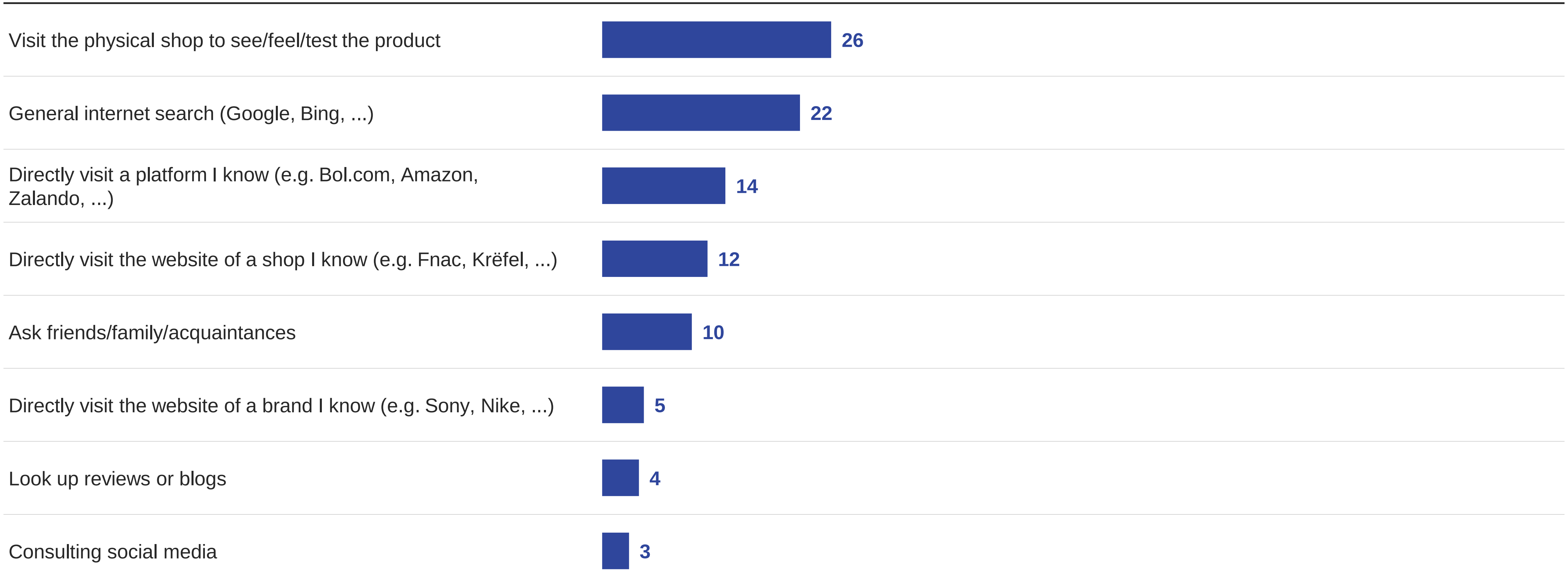
9% **of online shoppers visited the physical shop to gather information, but did not buy there because…**



Base: Those that visited the physical shop to gather information (n=182)
Question: Q7. You gathered information through the physical shop when you made your last purchase, of the product below. So why didn't you buy this from the shop itself?
Note: Question was asked with regards to specific product category

WHAT IS THE FIRST STEP SHOPPERS WOULD TAKE WHEN BUYING A LESS FREQUENTLY BOUGHT PRODUCT?

When buying a less frequently bought product, visiting the physical shop to see the product and doing a general internet search first, remain the most popular first steps shoppers would take.



Base: Total Sample, excl. those that that bought all categories in the past 12 months (n=5201) (Response level: respondent evaluated more than one product category)
Question: Q29. You have not bought the product below in the past year. Suppose you wanted to purchase this online, what is the first thing you would do?
Note: Question was asked with regards to specific product category

INTRO

WHAT DO PEOPLE SHOP ONLINE?

ONLINE PATH TO PURCHASE

WHAT TRIGGERS PEOPLE WHEN BUYING THEIR PRODUCT ONLINE?

WHERE DO SHOPPERS SEARCH FOR INFORMATION? AND WHAT DO THEY LOOK FOR?

WHERE DO ONLINE SHOPPERS BUY? AND WHY?

WHICH PAYMENT AND SHIPPING HABITS DO PEOPLE HAVE?

WHAT PURCHASE HURDLES DO ONLINE SHOPPERS HAVE?

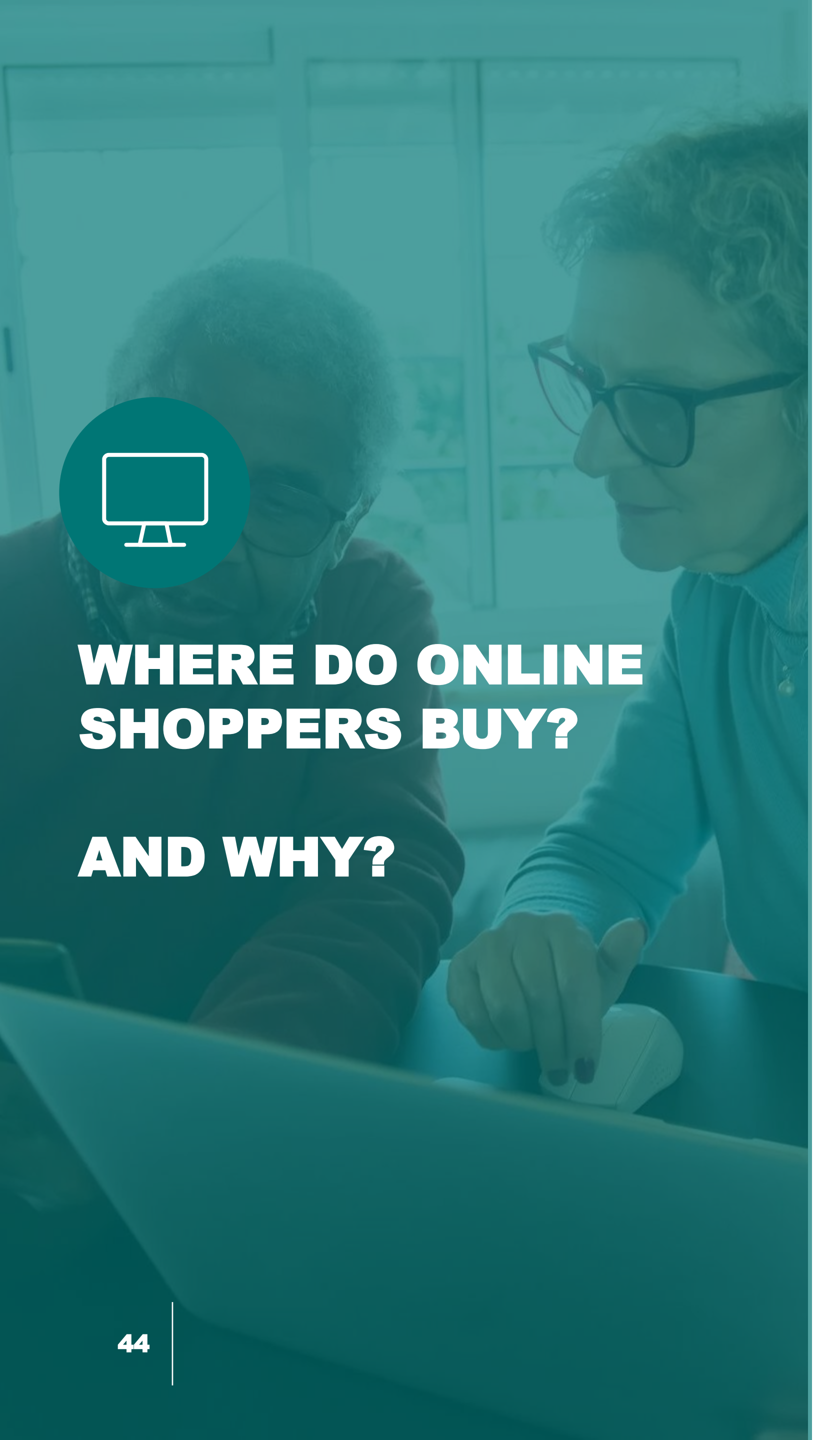
AD HOC

WHAT IS THE ROLE OF PLATFORMS?

HOW HAVE ONE-CLICK PAYMENT USAGE AND DATA ATTITUDES EVOLVED?

HOW IMPORTANT IS WEBSHOP ORIGIN?

TO WHAT EXTENT DO SHOPPERS CONTACT THE WEBSHOP?



WHERE DO ONLINE SHOPPERS BUY?

AND WHY?

CONSIDERATION SET REMAINS SMALL, BUT STABLE

- Most shoppers have 1 to 3 fixed webshops and 1 in 2 did not consider any other webshops for their last online purchase. Majority also indicates they bought from webshop before.
- Consideration is similar to previous wave. The consideration set is thus still small and hard to get into. There might be hope for the future though, as younger shoppers show higher consideration than older shoppers, and the gap between the two has gotten bigger since last wave (consideration of younger shoppers has increased).

PRICE AND SATISFACTION REMAIN KEY

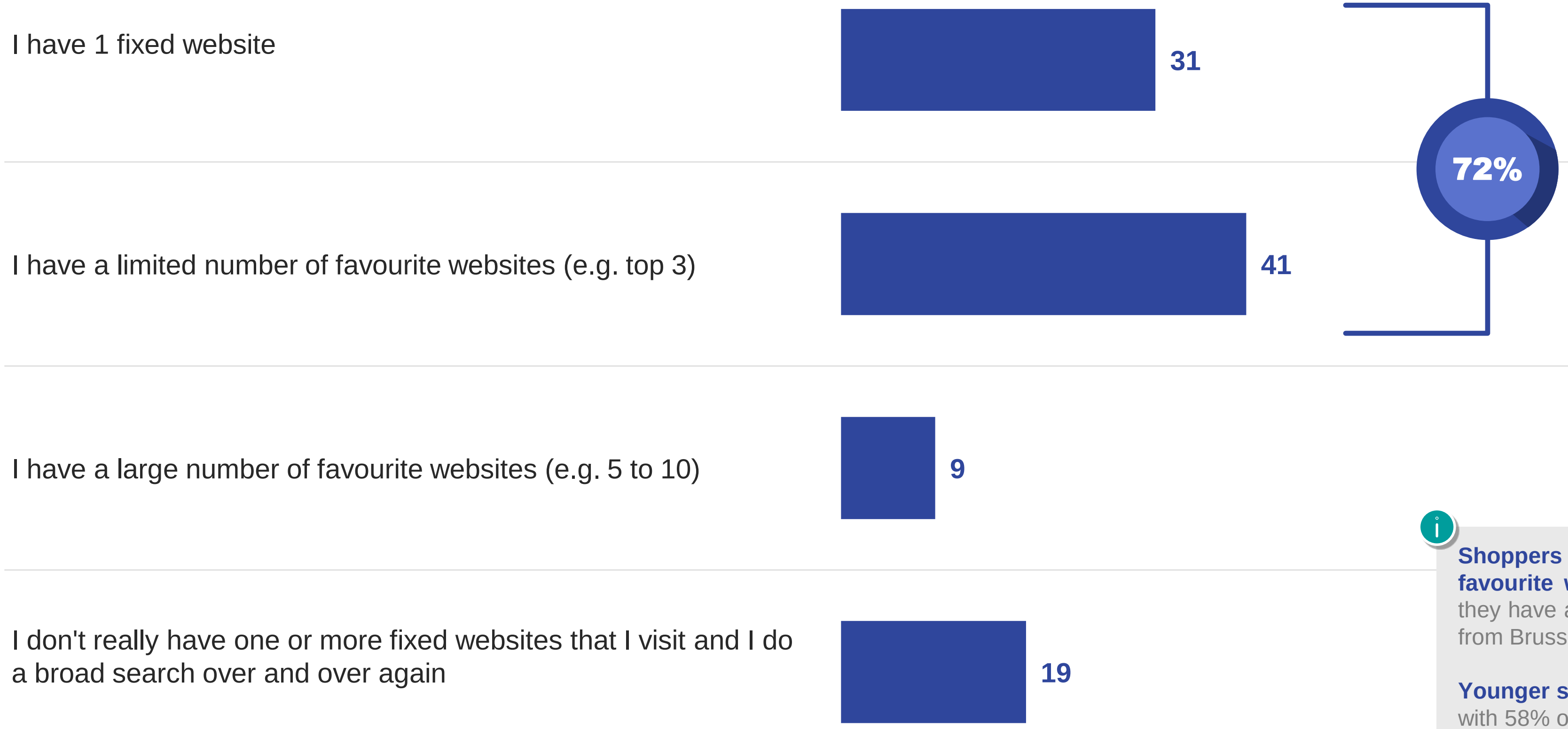
- The main drivers to choose a specific webshop remain the same: price and satisfaction lead the herd. These also remain the top reasons to compare or not compare webshops.
- Younger shoppers are less price oriented.

PLATFORMS HOLD STRONG

- Just over 1 in 3 did last online purchase through a platform. This remains highest for toys/hobby/party goods and lowest for telecom products.

TO WHAT EXTENT DO ONLINE SHOPPERS HAVE A GO-TO-WEBSHOP?

The majority of online shoppers are consistent in having a select few websites they consult repeatedly, with just over 7 in 10 having one to three favourite websites to buy from. Still 1 in 5 do not have a fixed website and do a broad search every time. Again, only a small number of online shoppers have a wide range of favourite websites to buy from.



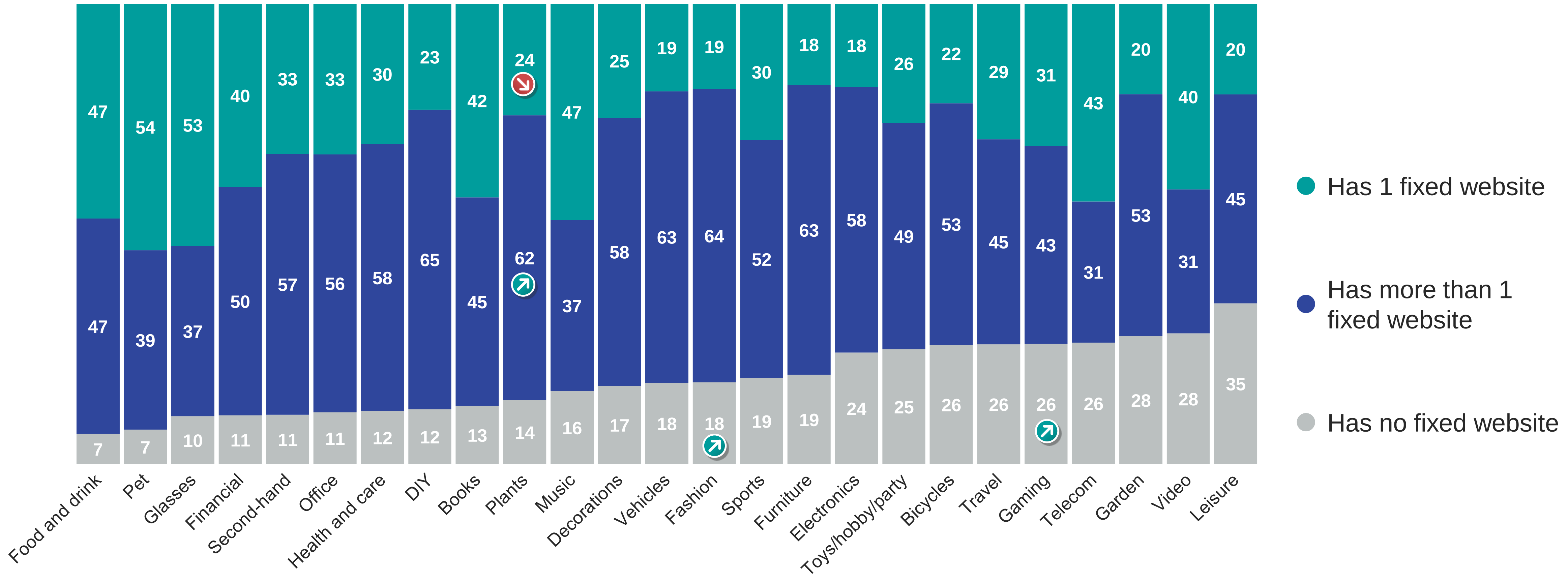
Shoppers from Flanders more often have a select number of favourite websites, with 76% of Flemish shoppers *(n=1083)* saying they have a maximum three favorite websites versus 67% for shoppers from Brussels *(n=232)* and 66% for shoppers from Wallonia *(n=685)*.

Younger shoppers have more go-to websites than older shoppers, with 58% of 18- to 24-year-olds *(n=253)* having more than one favourite shop versus 49% of 25- to 70-year-olds *(n=1747)*.

Base: Total Sample (n=2000)
Question: Q21. Indicate which statement best describes you. For online purchases within the category …, I have …
Note: Question was asked with regards to specific product category

TO WHAT EXTENT DO ONLINE SHOPPERS HAVE A GO-TO-WEBSHOP, DEPENDING ON THE TYPE OF PRODUCT?

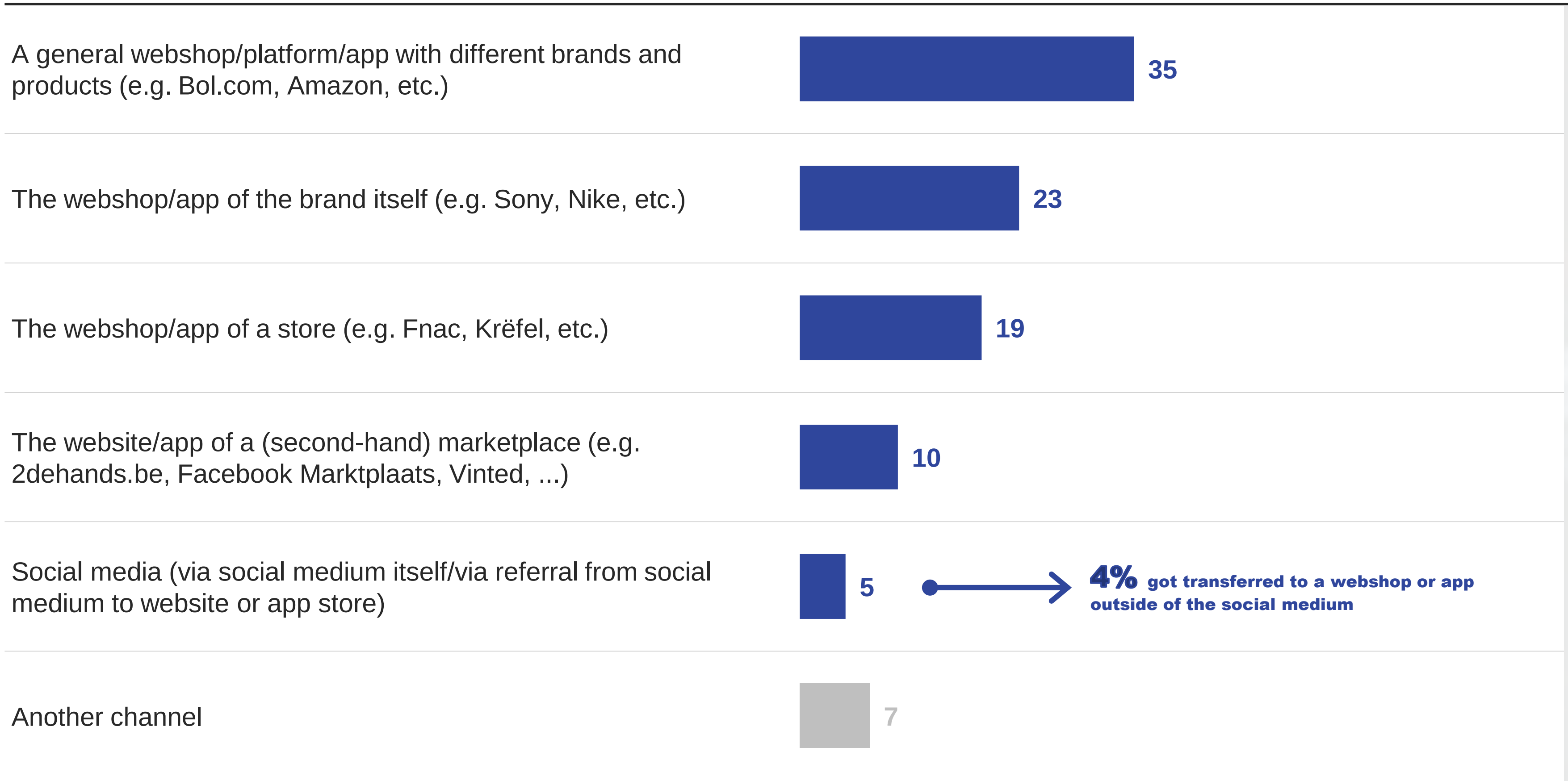
There is a decrease in having one fixed website and an increase in having more than one fixed website for plants. For fashion and gaming there is less loyalty than before and thus an increase in having no fixed website.



Base: Those that were allocated to a product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)
Question: Q21. Indicate which statement best describes you. For online purchases within the category …, I have …

WHERE DO ONLINE SHOPPERS BUY?

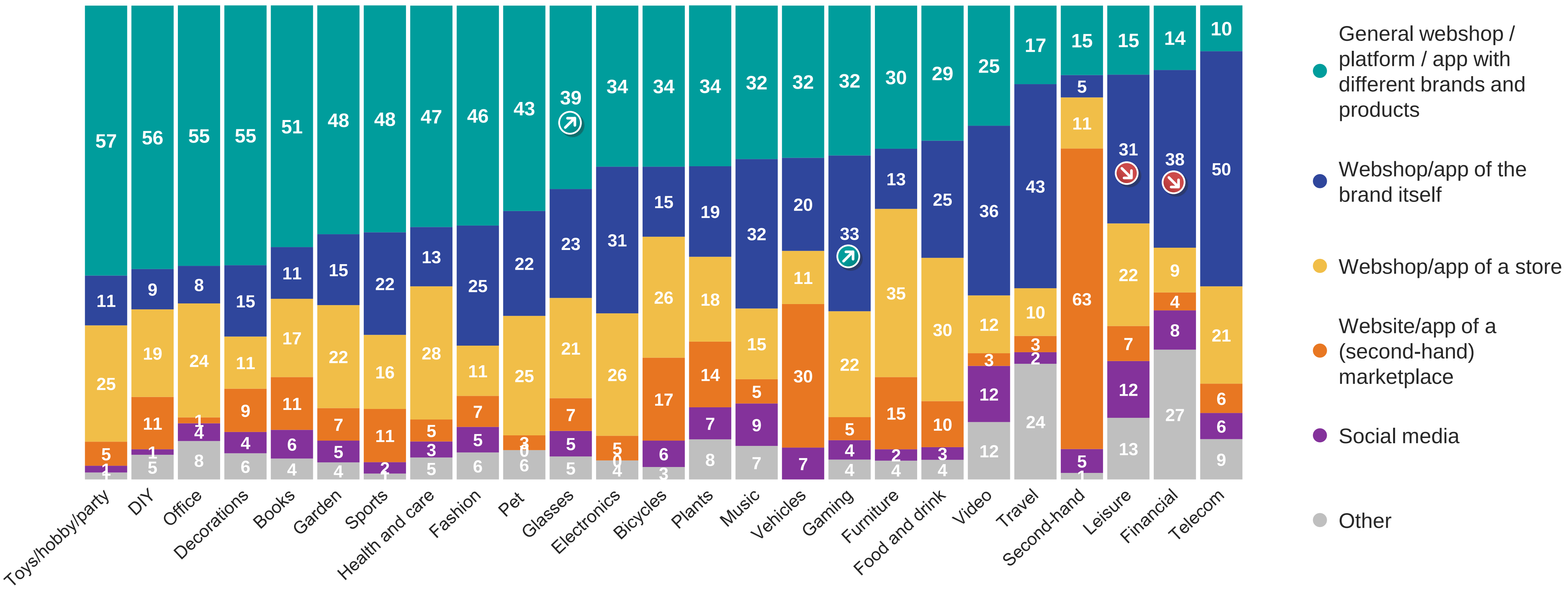
Platforms, such as Bol.com or Amazon remain the most popular purchase channel, with somewhat more than 1 in 3 having bought from a platform for their last purchase. Also, secondhand marketplaces and social media still seem to be more niche and are bought from by a smaller number of shoppers.



Base: Total Sample (n=2000)
Question: Q8. Still remember your last online purchase of the product below. Through which channel did you buy it?
Note: Question was asked with regards to specific product category

WHERE DO ONLINE SHOPPERS BUY, DEPENDING ON PRODUCT CATEGORY?

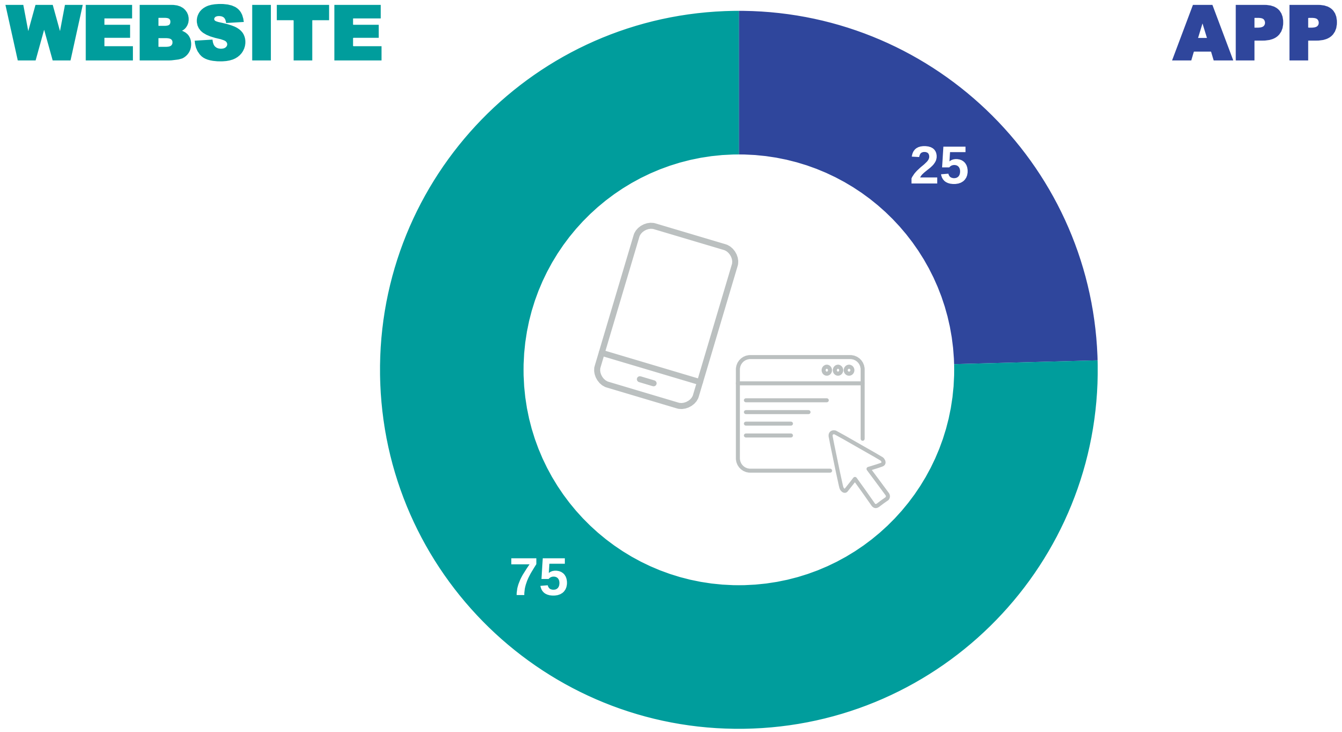
There is an increase in platform usage for buying glasses (23% in 2023) while gaming products are now bought more via the brand itself (19% in 2023). Leisure and financial products, on the other hand, are now bought less from the brand itself (47% in 2023).



Base: Those that were allocated to a product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)
Question: Q8. Still remember your last online purchase of the product below. Through which channel did you buy it?

DO ONLINE SHOPPERS BUY VIA THE WEBSITE OR THE APP?

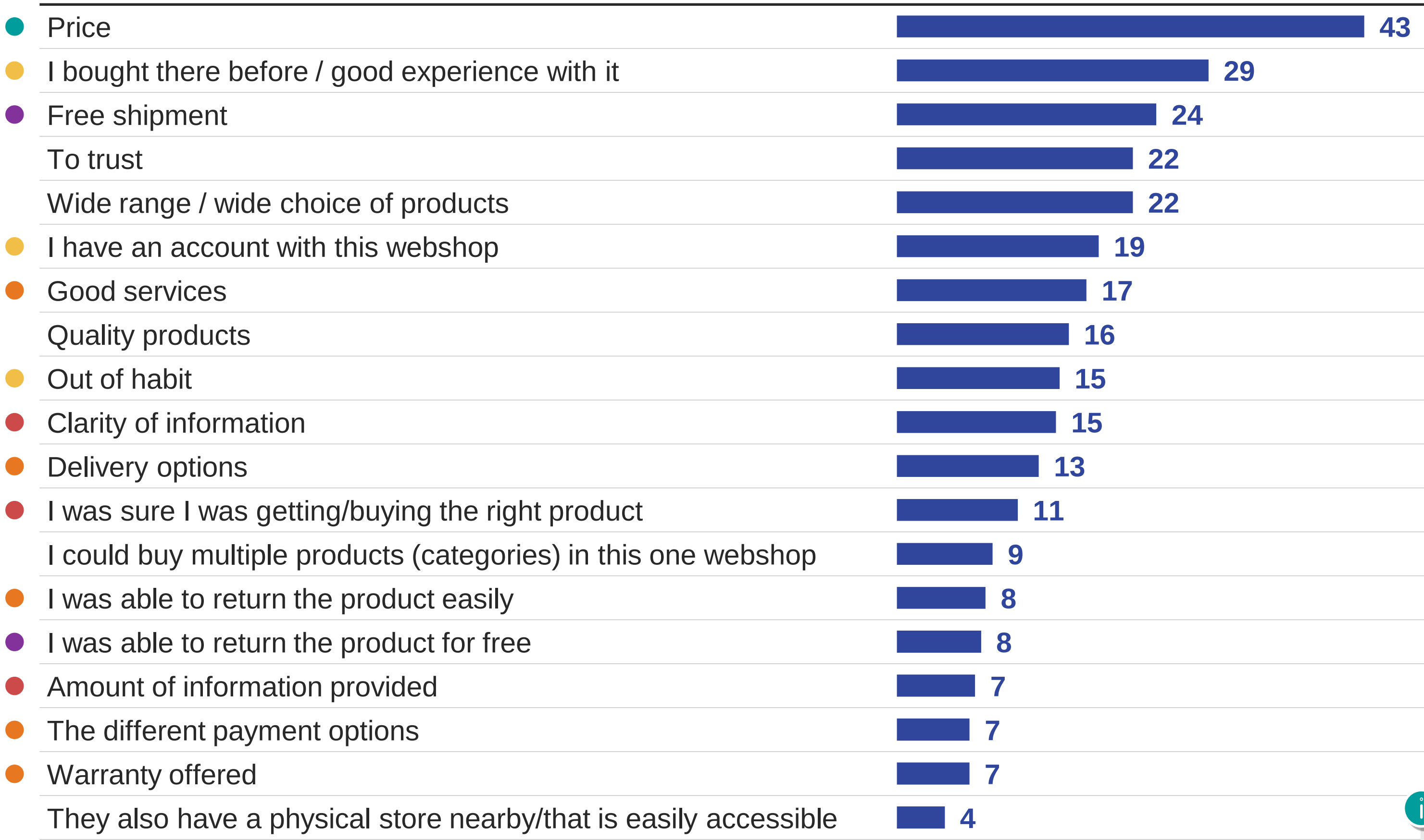
Still 3 out of 4 shoppers made their last online purchase via the website of an online store.



Base: Total Sample (n=2000)
Question: Q10. Did you buy through the website or the mobile app?
Note: Question was asked with regards to specific product category.

WHAT DRIVES ONLINE SHOPPERS TO BUY FROM A SPECIFIC WEBSHOP?

Across the board, the drivers to shop from a specific webshop remain stable. The main driver is still price. Familiarity again comes in second place. The offered service is vital as well, whether it be actual customer service or delivery options. The top three most important drivers for online shoppers thus remain the same and are related to price, familiarity and service.



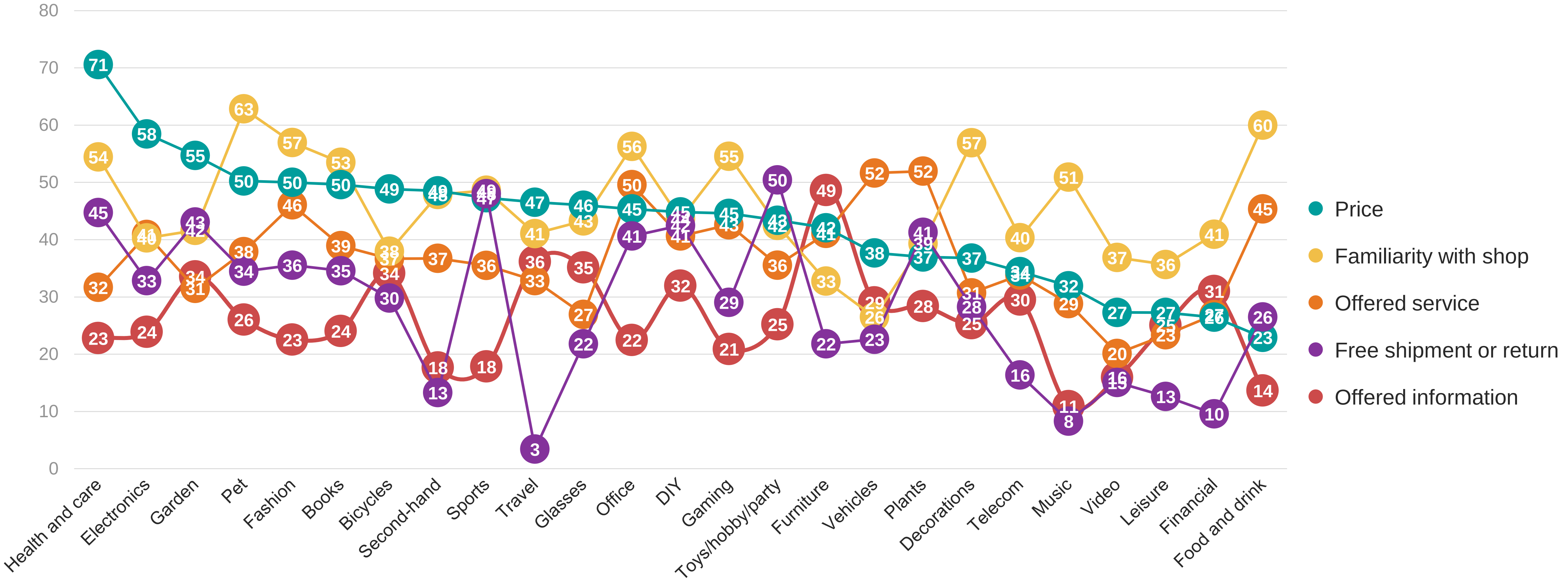
Younger shoppers care less about price, with 30% of 18–24-year-olds *(n=253)* selecting price as a choice driver versus 45% of 25- to 70-year-olds *(n=1747)*. **Familiarity is also less important** (17% versus 30%), **as well as having a great choice of products** (15% versus 22%) and having **free shipment** (15% versus 25%).

7% looks at price only.

Base: Total Sample (n=2000)
Question: Q11. Think about the webshop where you last bought the product below. Why did you choose this webshop?
Note: Question was asked with regards to specific product category.

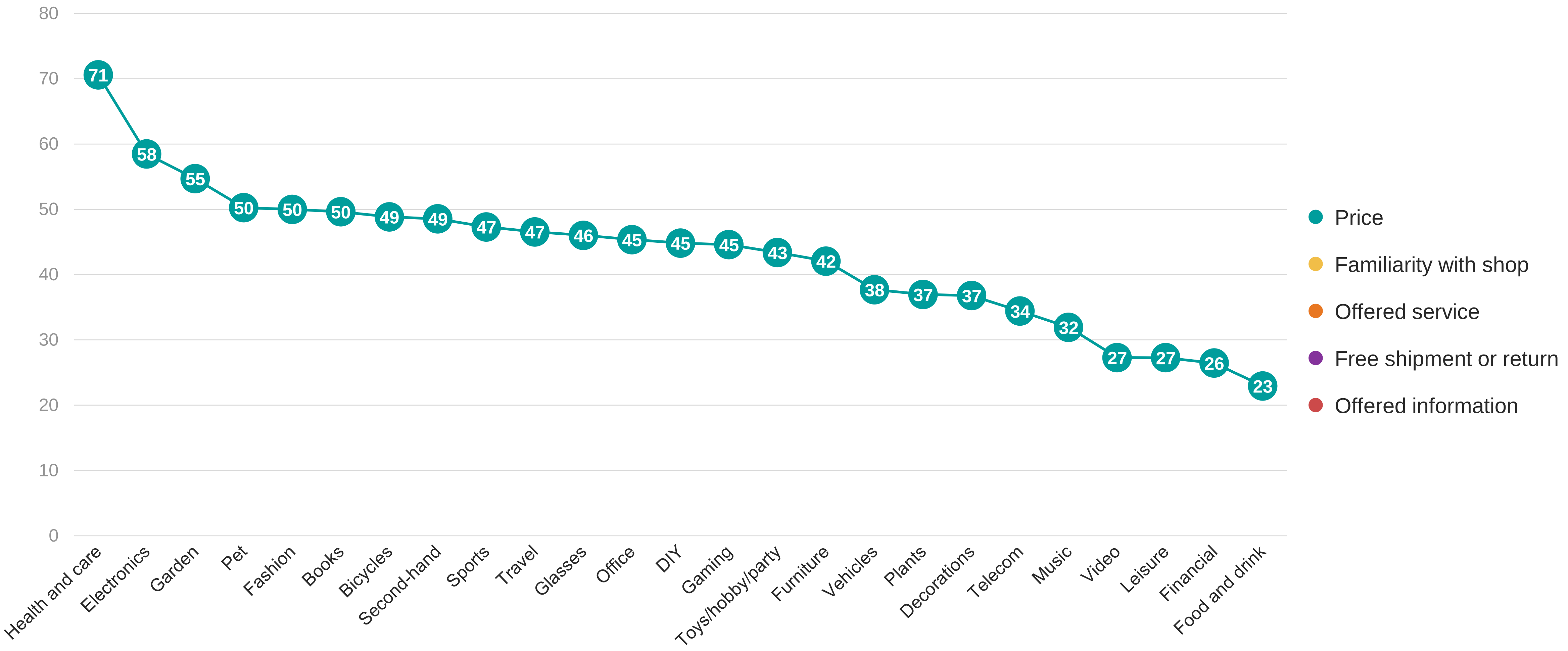
WHAT DRIVES ONLINE SHOPPERS TO BUY FROM A SPECIFIC WEBSHOP, DEPENDING ON PRODUCT CATEGORY?

Offered service has become a more important driver when buying vehicles and pet products. Having free shipment or returns, on the other hand, is now a more important driver when choosing where to buy toys, sports products and plants.



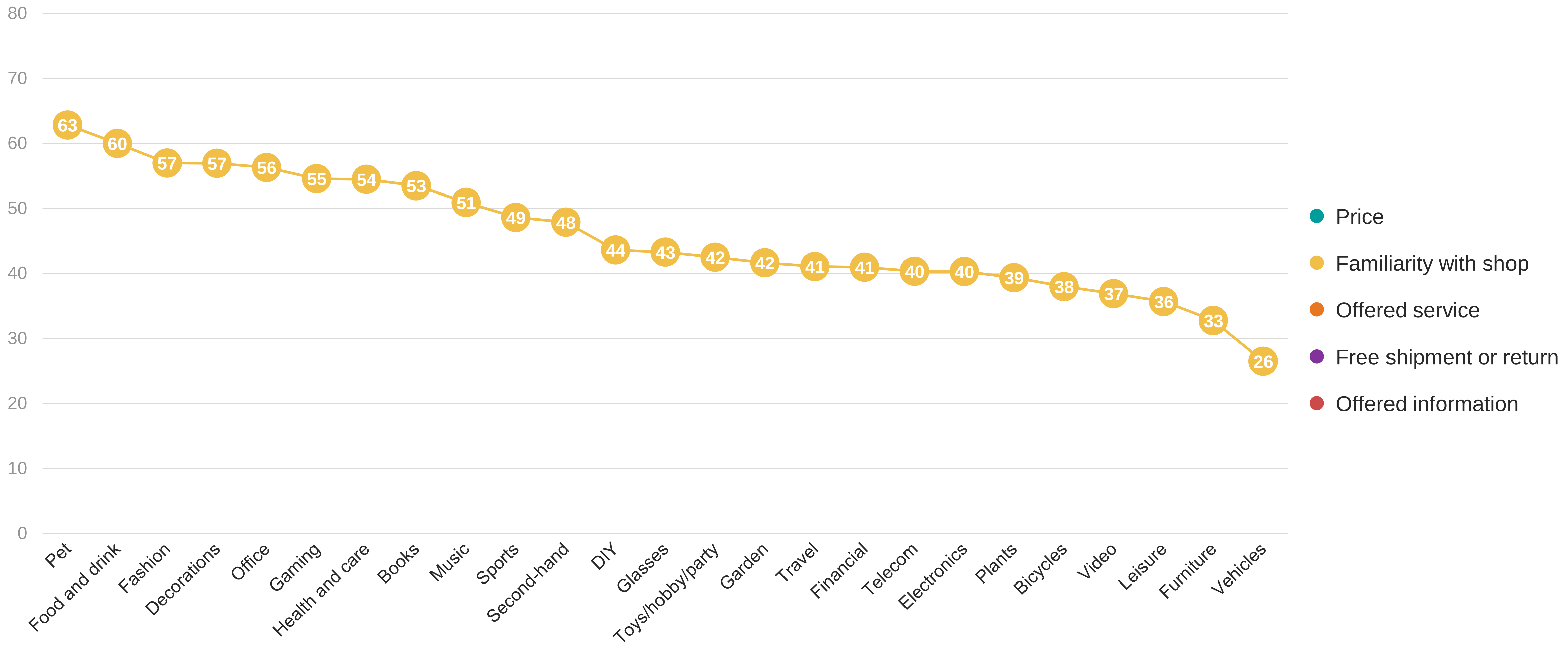
Base: Those that were allocated to a product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)
Question: Q11. Think about the webshop where you last bought the product below. Why did you choose this webshop?

WHAT DRIVES ONLINE SHOPPERS TO BUY FROM A SPECIFIC WEBSHOP, DEPENDING ON PRODUCT CATEGORY? – FOCUS ON PRICE



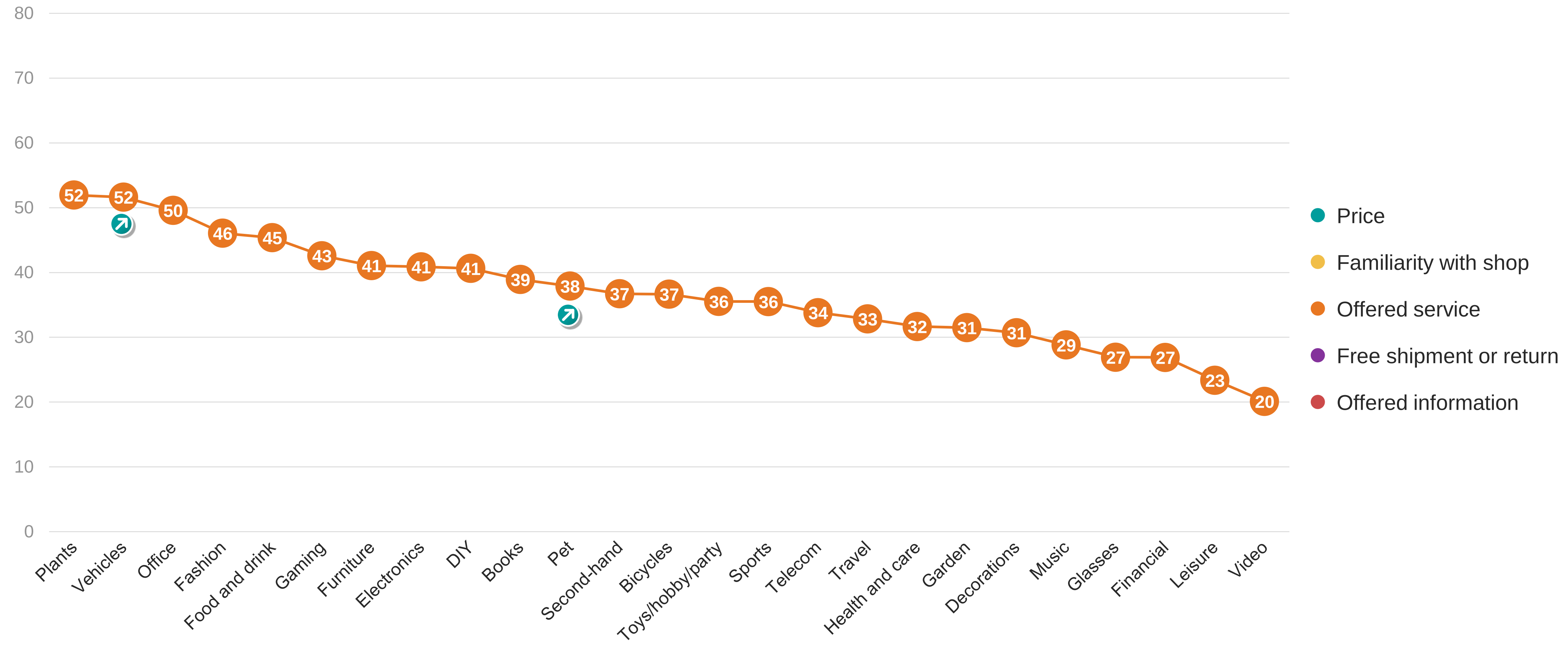
Base: Those that were allocated to a product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)
Question: Q11. Think about the webshop where you last bought the product below. Why did you choose this webshop?

WHAT DRIVES ONLINE SHOPPERS TO BUY FROM A SPECIFIC WEBSHOP, DEPENDING ON PRODUCT CATEGORY? – FOCUS ON FAMILIARITY



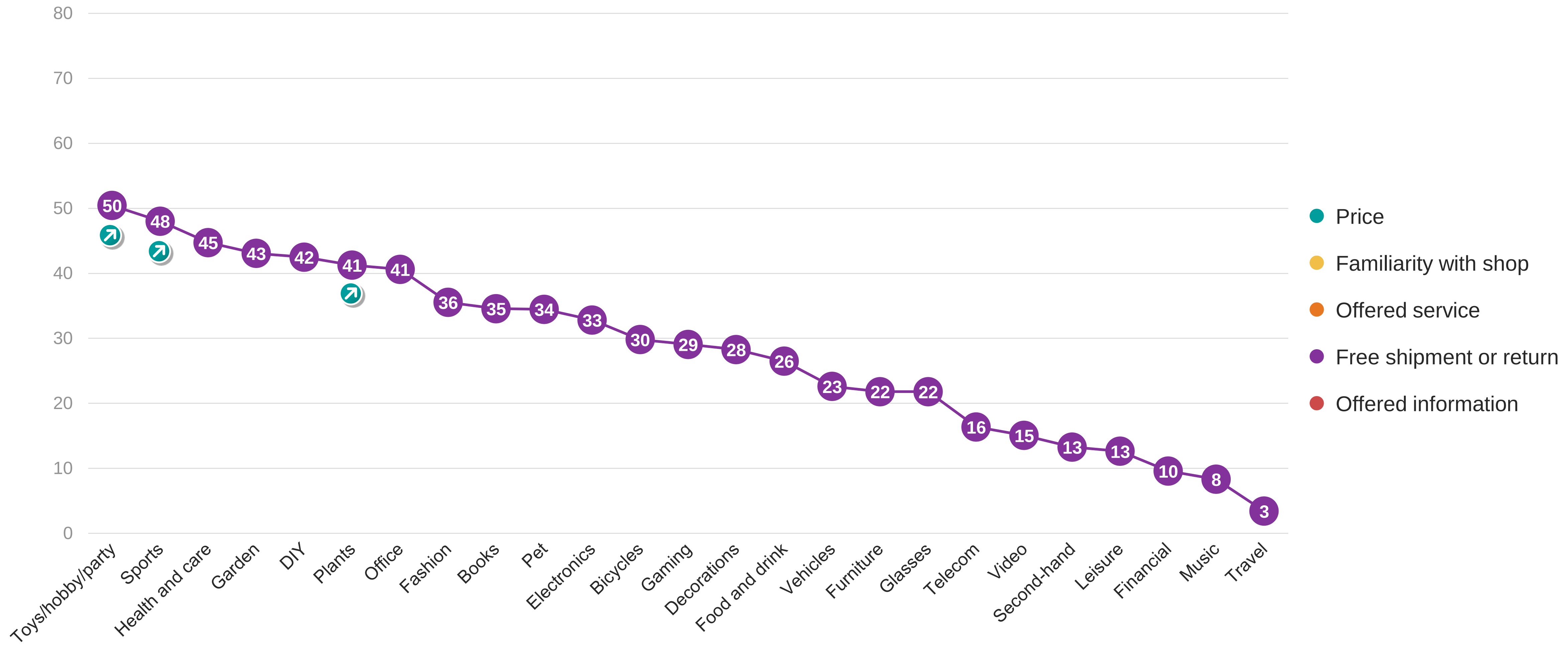
Base: Those that were allocated to a product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)
Question: Q11. Think about the webshop where you last bought the product below. Why did you choose this webshop?

WHAT DRIVES ONLINE SHOPPERS TO BUY FROM A SPECIFIC WEBSHOP, DEPENDING ON PRODUCT CATEGORY? – FOCUS ON SERVICE



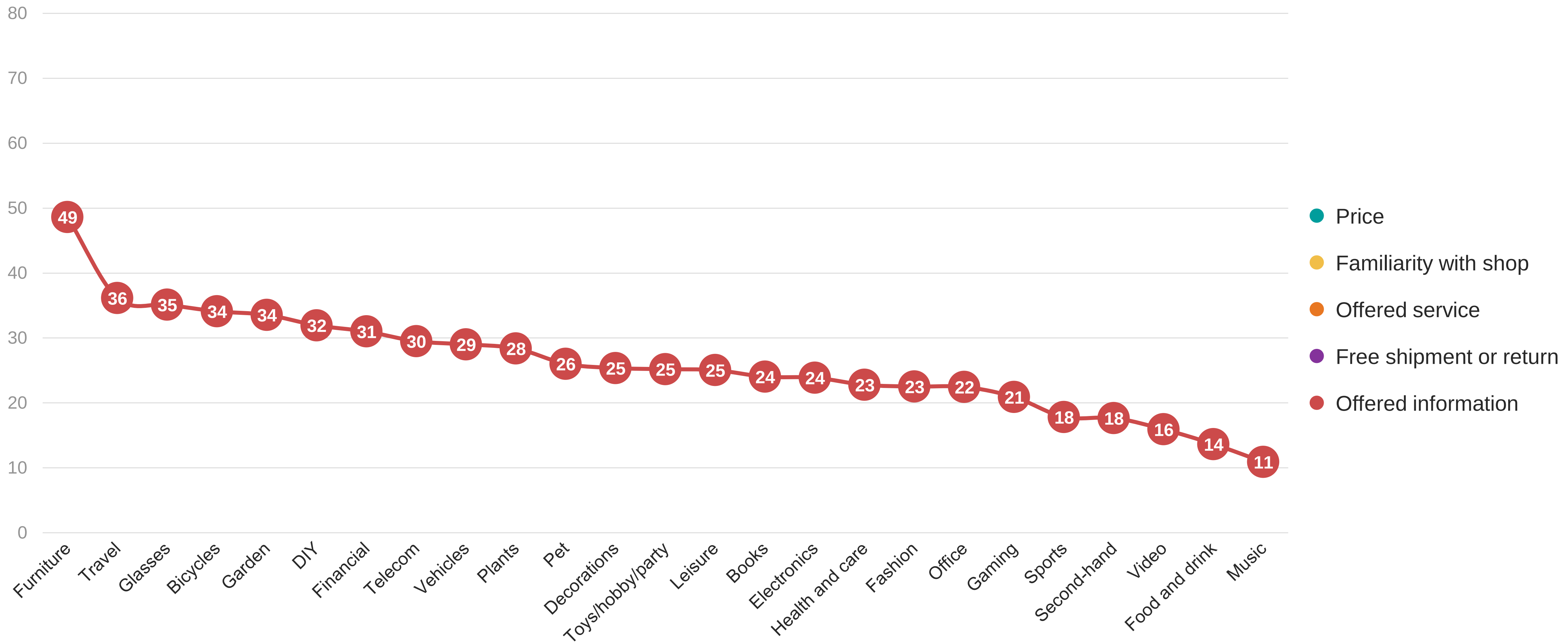
Base: Those that were allocated to a product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)
Question: Q11. Think about the webshop where you last bought the product below. Why did you choose this webshop?

WHAT DRIVES ONLINE SHOPPERS TO BUY FROM A SPECIFIC WEBSHOP, DEPENDING ON PRODUCT CATEGORY? – FOCUS ON FREE SHIPMENT OR RETURN



Base: Those that were allocated to a product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)
Question: Q11. Think about the webshop where you last bought the product below. Why did you choose this webshop?

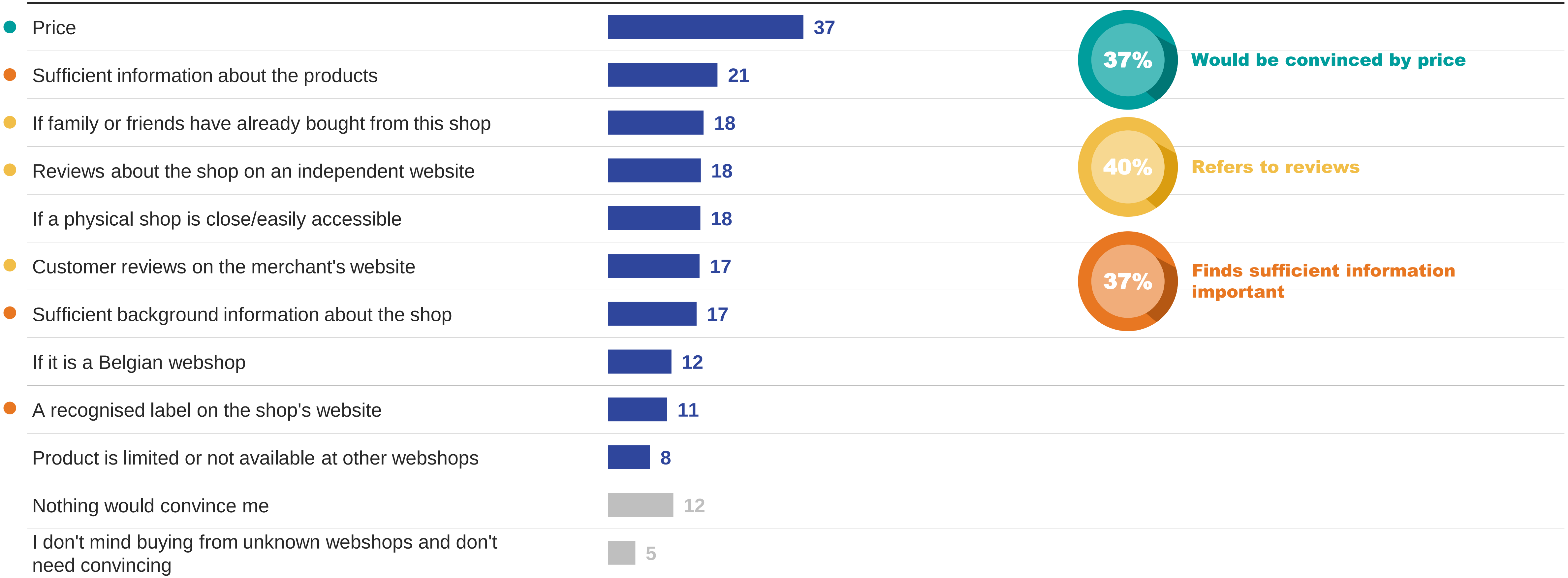
WHAT DRIVES ONLINE SHOPPERS TO BUY FROM A SPECIFIC WEBSHOP, DEPENDING ON PRODUCT CATEGORY? – FOCUS ON INFORMATION



Base: Those that were allocated to a product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)
Question: Q11. Think about the webshop where you last bought the product below. Why did you choose this webshop?

WHAT CONVINCES ONLINE SHOPPERS TO BUY FROM AN UNKNOWN WEBSHOP?

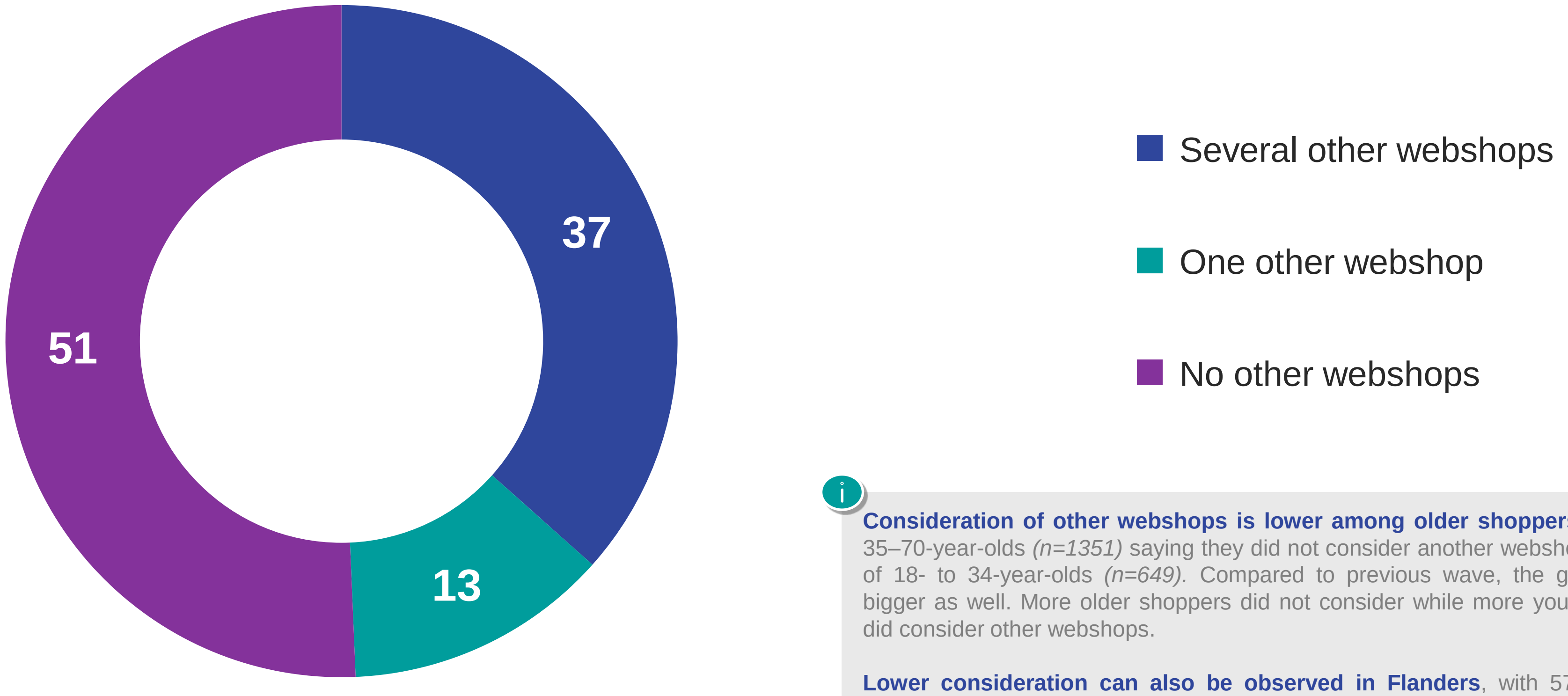
Price comes out on top again, even for webshops with which the shopper is not familiar, confirming that it is a very strong aspect for online shoppers to look at and compare on.



Base: Total Sample, excl. those that that bought all categories in the past 12 months (n=1822)
Question: Q30. Suppose you want to purchase the product below from a shop where you have never bought anything before. What would convince you to purchase from this unfamiliar shop?
Note: Question was asked with regards to specific product category.

TO WHAT EXTENT ARE OTHER WEBSHOPS CONSIDERED?

Still 1 in 2 online shoppers did not consider another webshop for their last online purchase.
The other half did look at more than one webshop, with again nearly 4 in 10 having compared more than two.



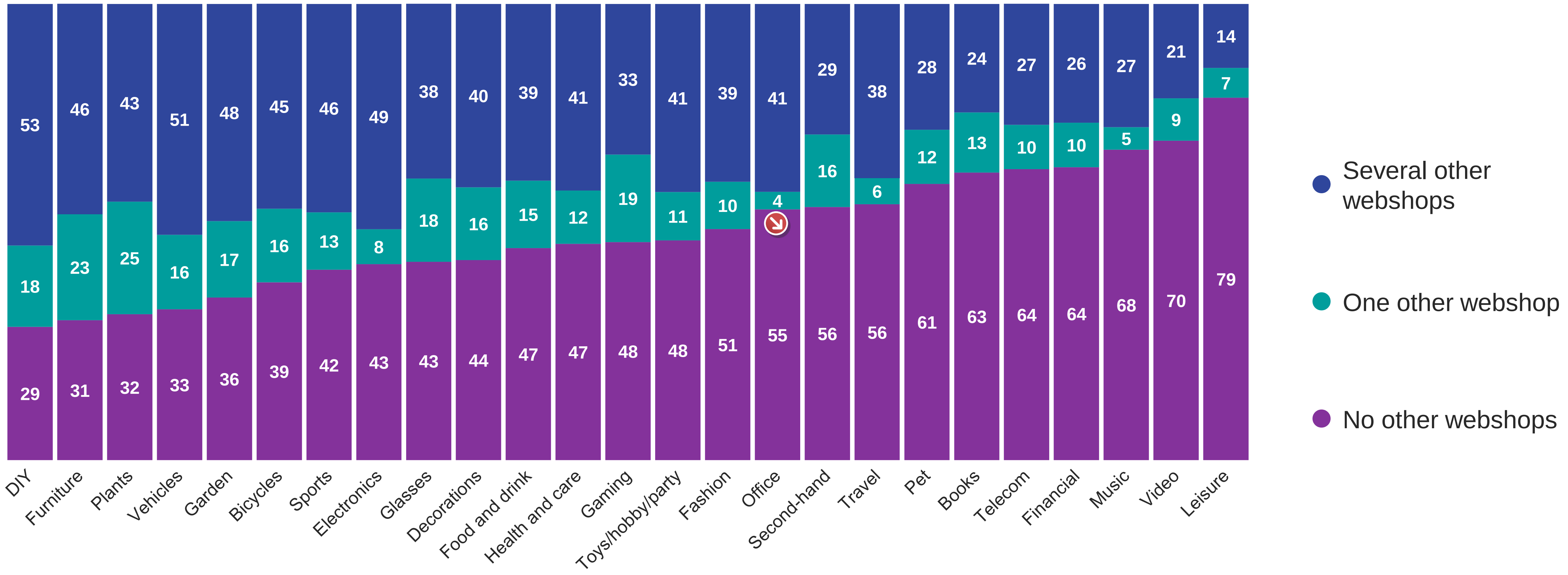
Consideration of other webshops is lower among older shoppers, with 57% of 35–70-year-olds *(n=1351)* saying they did not consider another webshop versus 38% of 18- to 34-year-olds *(n=649)*. Compared to previous wave, the gap has gotten bigger as well. More older shoppers did not consider while more younger shoppers did consider other webshops.

Lower consideration can also be observed in Flanders, with 57% of Flemish online shoppers *(n=1083)* not considering any other webshop while in Brussels *(n=232)* this is 37%, and in Wallonia *(n=685)* 44%.

Base: Total Sample (n=2000)
Question: Q12. Did you look at or consider any other online shops?
Note: Question was asked with regards to specific product category.

TO WHAT EXTENT ARE OTHER WEBSHOPS CONSIDERED, DEPENDING ON TYPE OF PRODUCT?

Relatively less shoppers of office supplies now consider one webshop.
In line with results on total, results remain stable across product categories.

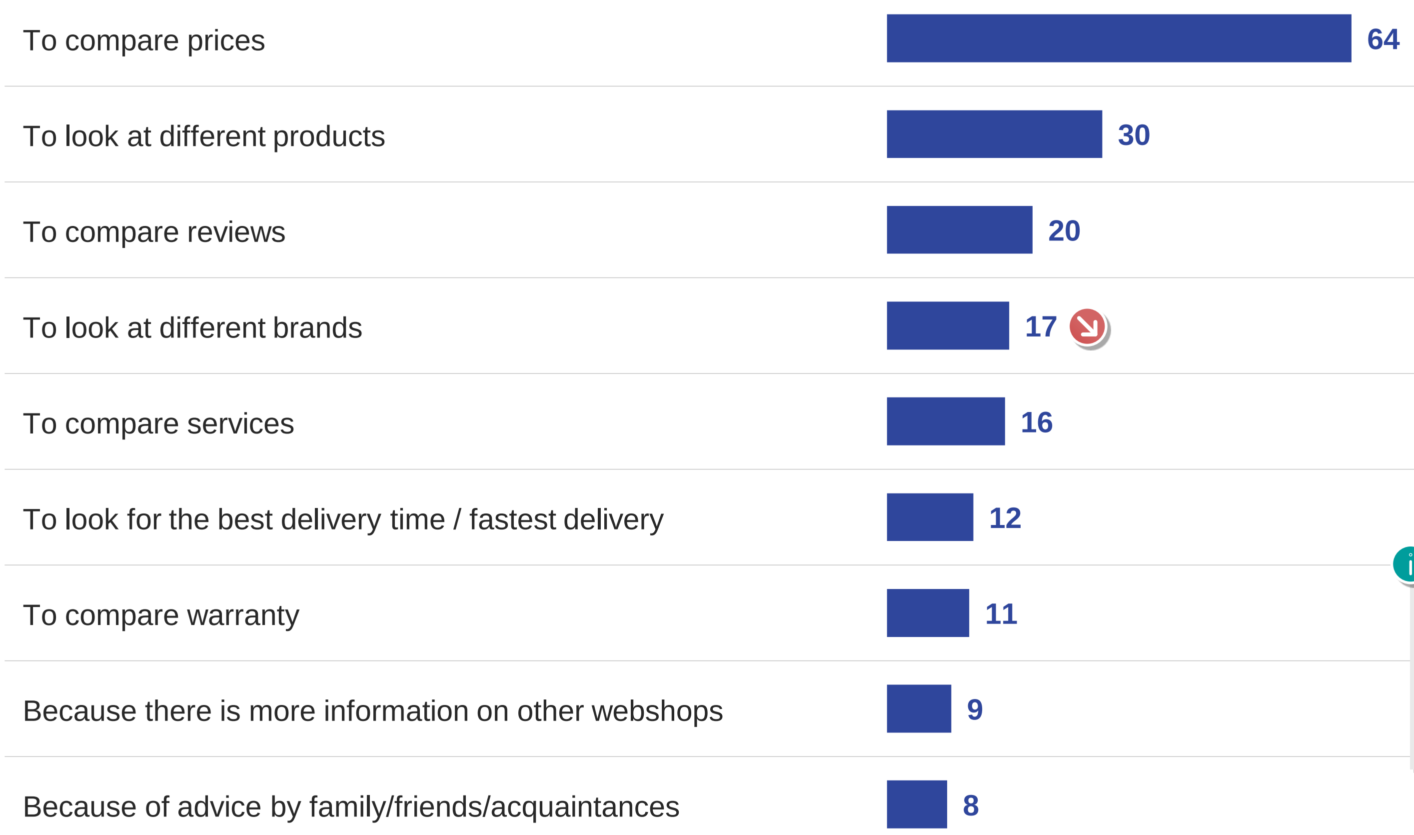


Base: Those that were allocated to a product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)
Question: Q12. Did you look at or consider any other online shops?

WHY DO ONLINE SHOPPERS COMPARE WEBSHOPS?

Getting the best offer in terms of price remains the main reason to compare webshops. In fact, nearly 2 in 3, of those that considered more than one webshop, say they wanted to compare prices. Looking at different brands, on the other hand, is now done less.

49% **of online shoppers compared two or more webshops for their last online purchase, ...**



Younger shoppers *(n=406)* show a **higher variety of reasons to compare** versus older shoppers *(n=582)*. Especially reviews *(24% vs 17%)*, best delivery time *(14% vs 10%)*, advice from family and friends *(14% vs 4%)* and more information on other webshops *(12% vs 7%)* show strong differences. **Older shoppers**, on the other hand, find **price** much more important to compare on (74% vs 50% of youngsters).

Base: Those that considered another webshop/several other webshops (n=988)
Question: Q13. Why did you look at or consider other online shops?
Note: Question was asked with regards to specific product category.

WHY DO ONLINE SHOPPERS NOT COMPARE WEBSHOPS?

The most important reason to not consider other webshops remains satisfaction. More than half, of those that did not consider any other webshop, says they did not because they are satisfied with the webshop they use. Another unchanged important reason is because of habit, with more than 1 in 4 saying they always buy from the same webshop.

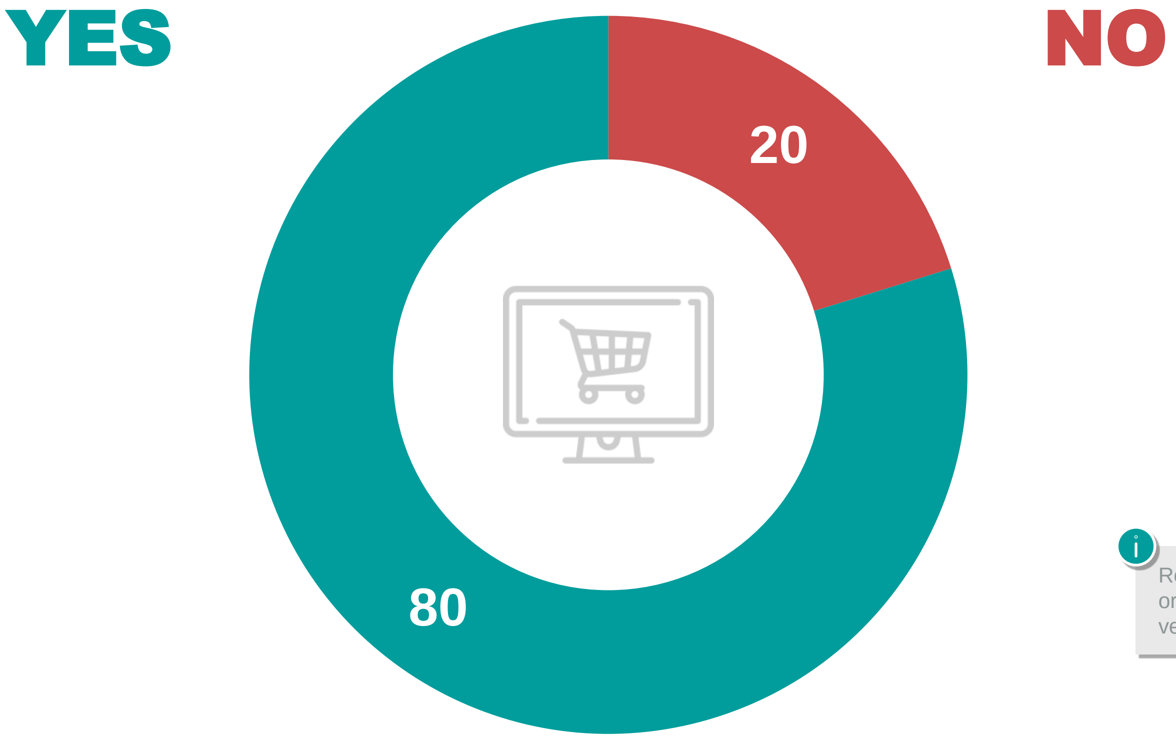
51% of online shoppers did not consider another webshop, because ...

For older shoppers, satisfaction is a stronger driver to not compare, as 54% of 25- to 70-year-olds *(n=934)* says they are satisfied with the webshop versus 38% of 18- to 24-year-olds *(n=78)*. This difference has strengthened compared to previous wave. **Habit**, on the other hand, **is now more important for younger shoppers** to not compare (40% of youngsters versus 27% of older shoppers).

Base: Those that did not consider another webshop (n=1012)
Question: Q14. Why did you not look at or consider other online shops?
Note: Question was asked with regards to specific product category.

HOW MANY ONLINE SHOPPERS RETURN TO STORES THEY BOUGHT FROM BEFORE?

With regards to their last online purchase, most shoppers have bought from the webshop before. For 1 in 5, it was the first time. These results are consistent with last wave.

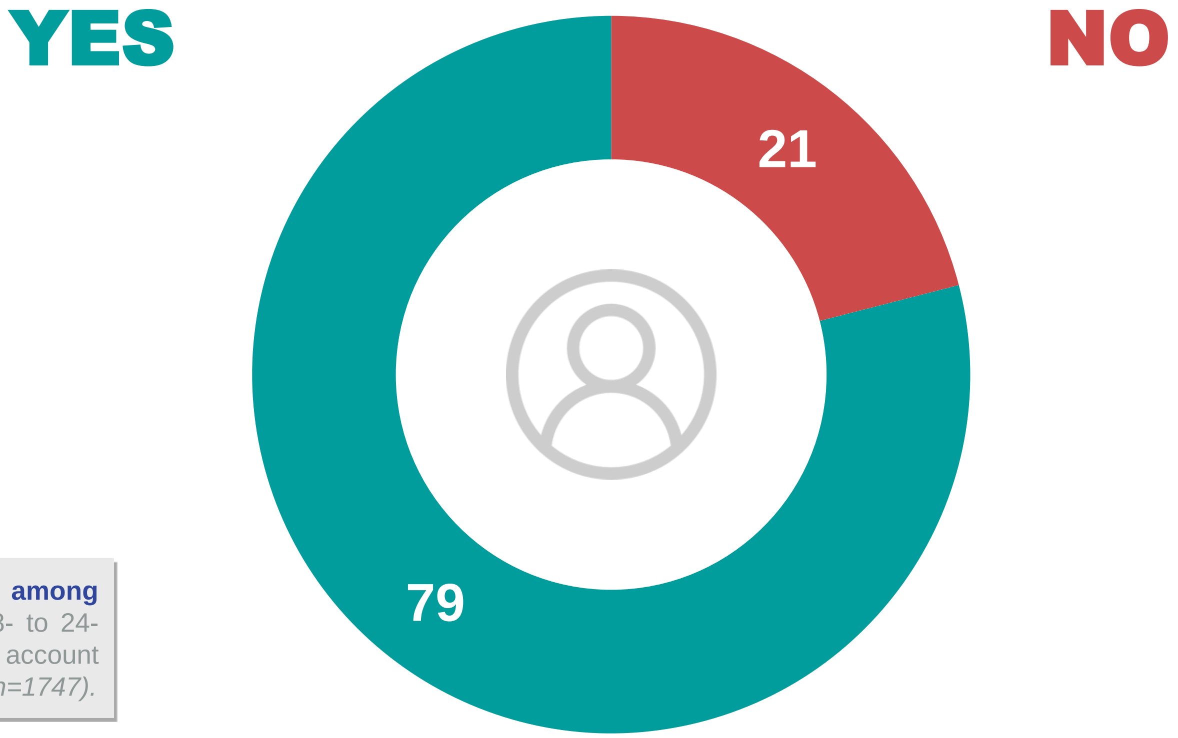


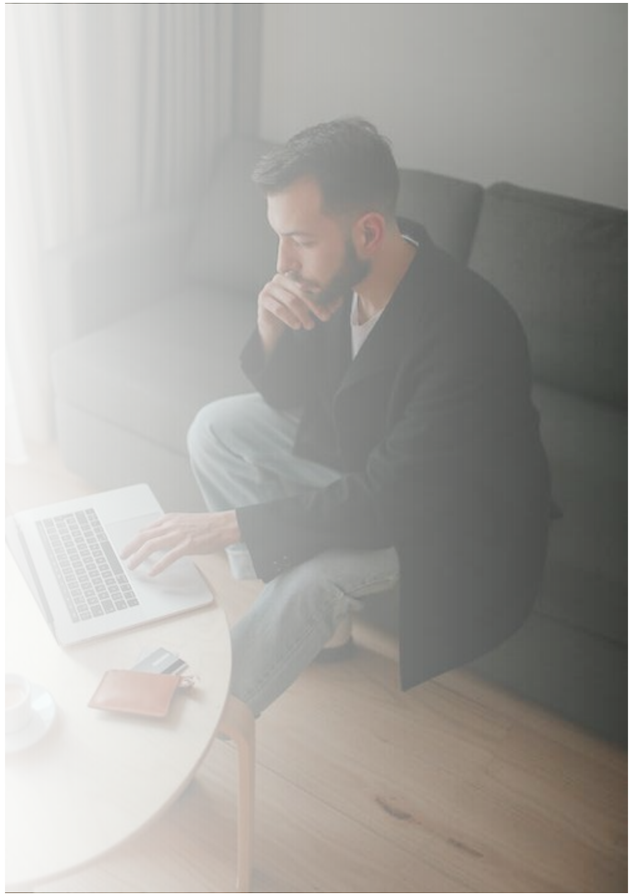
Repeat purchasing is higher for gaming, pet food or toys, office supplies, and fashion. Lowest for vehicles.

Base: Total Sample (n=2000)
Question: Q15. Still think about the webshop where you last bought the product below. Had you purchased from this webshop before this?
Note: Question was asked with regards to specific product category.

HOW MANY ONLINE SHOPPERS HAVE A WEBSHOP ACCOUNT?

Most online shoppers still have an account for the webshop they made their purchase at.



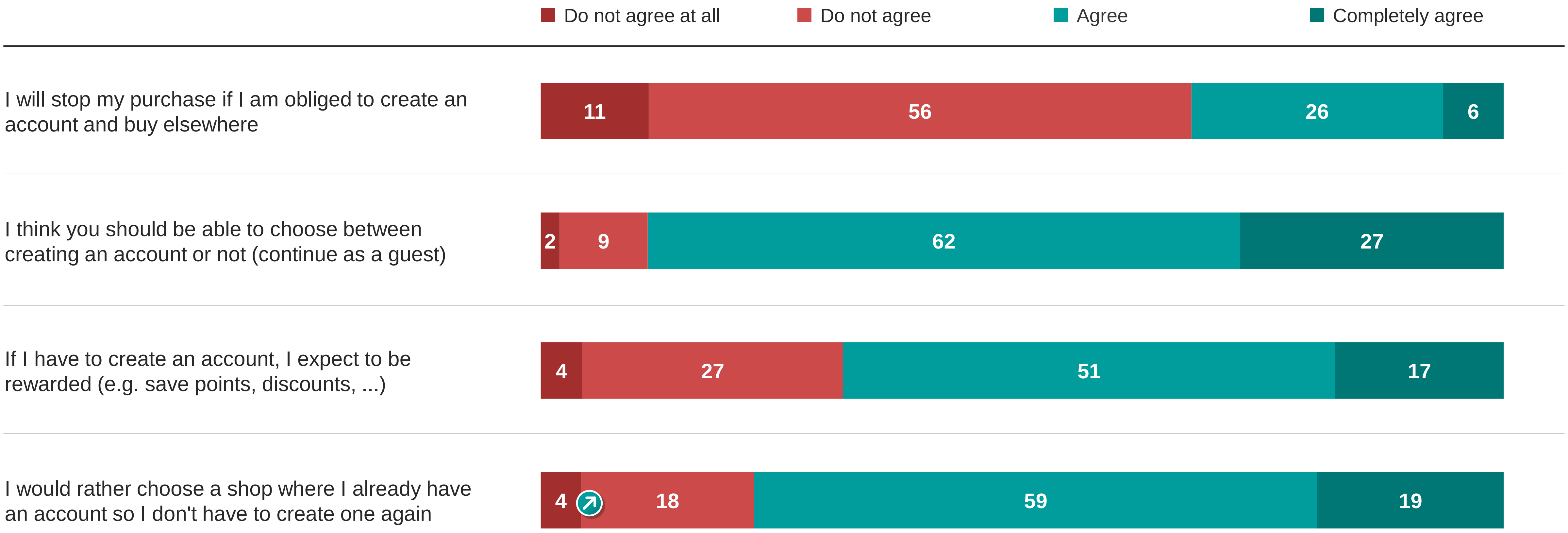


Account existence is higher among older shoppers, with 27% of 18- to 24-year-olds *(n=253)* not having an account versus 20% of 25 to 70-year-olds *(n=1747)*.

Base: Total Sample (n=2000)
Question: Q16. Do you have an account/login with this webshop?
Note: This slide shows similar numbers to % of online shoppers that did a repeat purchase: the data differs by a few decimals. Question was asked with regards to specific product category.

WHAT IS THE ATTITUDE OF ONLINE SHOPPERS TOWARDS WEBSHOP ACCOUNTS?

Agreement of online shoppers on having a choice and being rewarded for having an account remains stable. Most shoppers also still say they would not stop their purchase if they were obligated to create an account, but almost 1 in 3 would. Besides that, many online shoppers still agree that they would rather choose a webshop where they have an account (with a very small increase of those that totally disagree, 3% in 2023).



Base: Total Sample (n=2000)
Question: Q27. To what extent do you agree with the statements below?

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WHICH PAYMENT AND SHIPPING HABITS DO PEOPLE HAVE?

OVER TIME, BANCONTACT'S POSITION STRENGTHENS

- With 6/10 using Bancontact and almost half of online shoppers selecting it as their preferred payment method.
- PayPal and credit card close top 3, both equally used and preferred.
- Usage and preference of Apple Pay has increased, while Payconiq and 'paying afterwards' has decreased. Usage of Klarna, on the other hand, has increased.

PAYMENT SOLUTIONS CONTINUE TO BE A SENSITIVE TOPIC

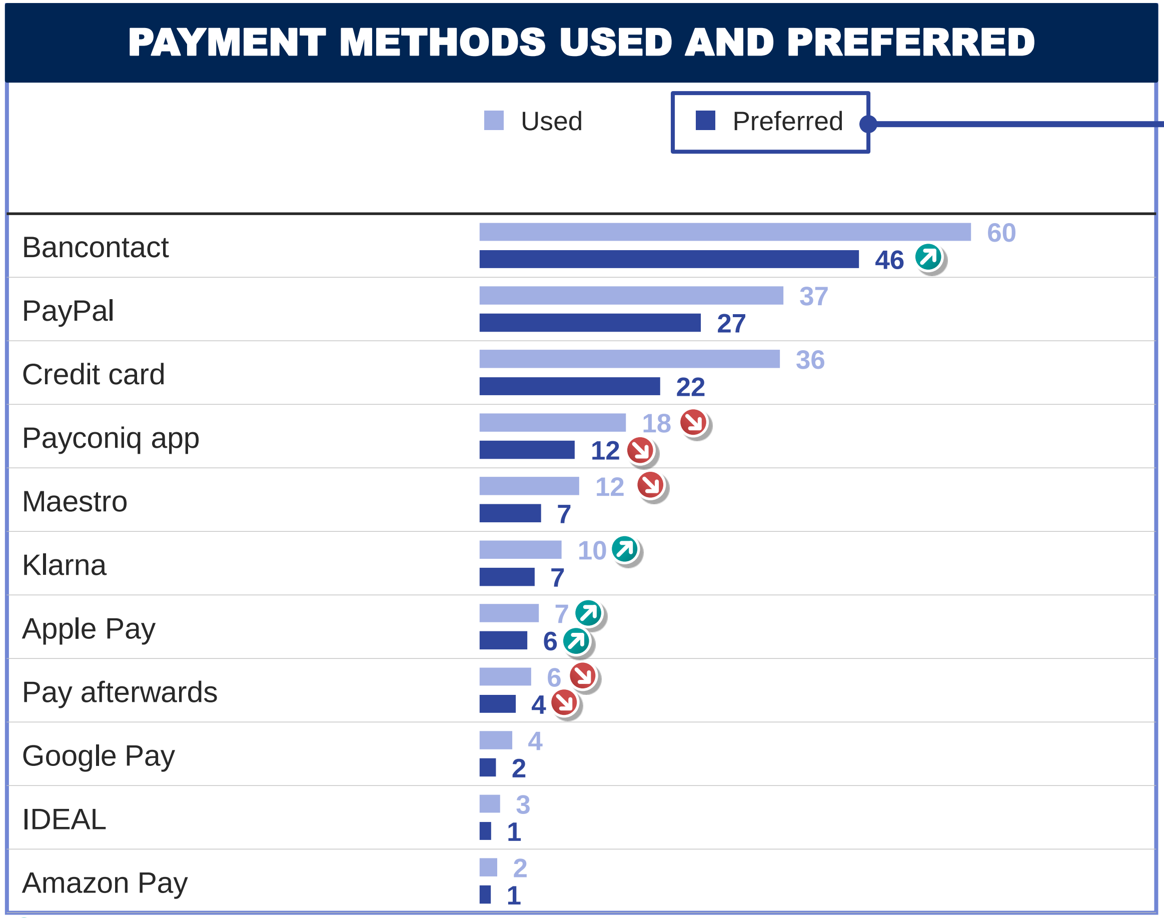
- 7 in 10 claim to prefer one payment method only when shopping online, while in reality, 4 in 10 uses one type only. The share of single users has increased slightly.
- 1 in 4 online shoppers say they would stop purchase if preferred payment methods are not available, an increase since the previous wave.

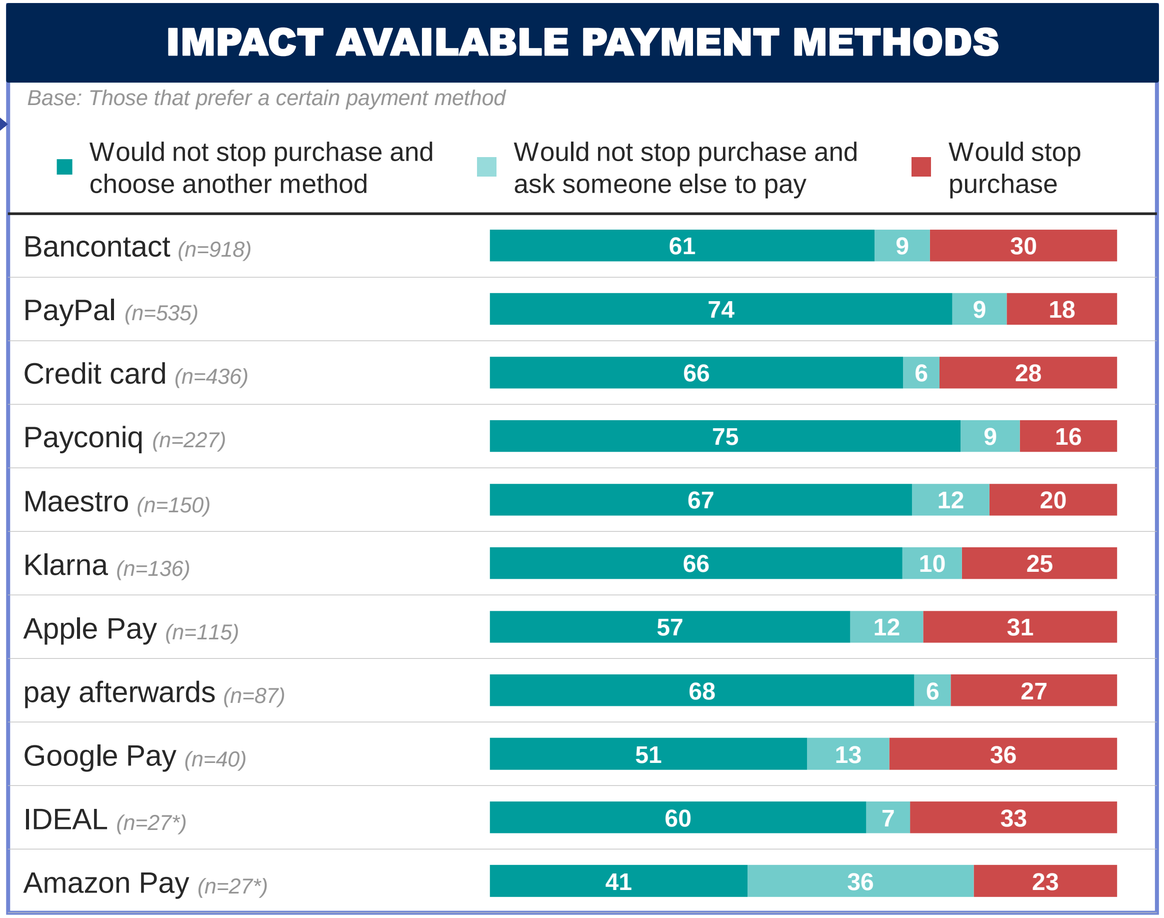
HOME DELIVERY STILL NUMBER ONE, YET COLLECTION POINTS GAIN TRACTION

- Just under 6 in 10 chose home delivery for their last online purchase, with a slight decrease compared to last wave. Delivery via a collection point, on the other hand, has increased slightly.
- Generation differences exist, as younger shoppers more often use a collection point or delivery at work, while older shoppers more often use home delivery.

WHAT PAYMENT METHODS ARE USED AND PREFERRED?

Bancontact still comes out on top and is the most used and preferred payment method for online purchases, with 3 in 5 of online shoppers using it and over 2 in 5 preferring it, both increased since previous wave. Payconiq app and pay afterwards, on the other hand, are now used and preferred less, while Apple Pay is used and preferred more now. Klarna also shows higher usage. In general, 1 in 4 would stop their purchase if their preferred methods are not available.





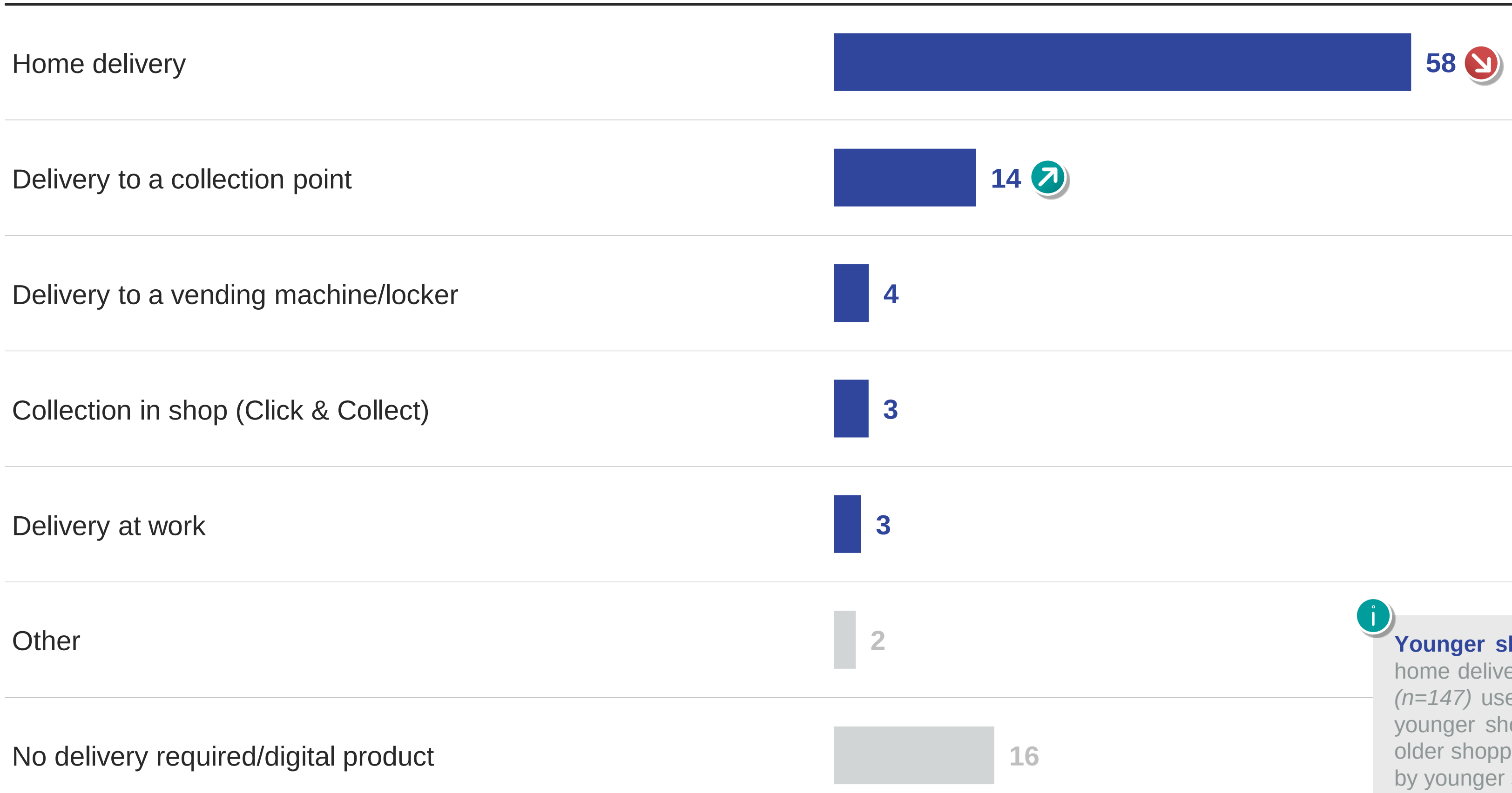
46% of shoppers use one type only, an increase from 41% previous wave. When asked about preference, 7 in 10 chooses one method only (stable).

Across the methods, 24% would stop their purchase, an increase from 21% previous wave.

Base: *Total Sample (n=2000)*
Question: *Q23. What payment methods do you use when making online purchases? / Q24. Which payment methods do you prefer to use when making online purchases?*
Q25. Suppose the payment methods below are not available on your next online purchase. What would you do then?

WHAT SHIPPING METHODS ARE USED?

Delivery at home remains the most popular shipping method for online purchases, with just under 6 in 10 having chosen this method for their last online purchase. Home delivery is losing a bit of popularity, while delivery to a collection point is gaining popularity, with just over 1 in 10 letting their package be delivered to a collection point.



Younger shoppers are open to a wider variety of shipping methods, while home delivery is more popular among older shoppers. 60% of 25- to 70-year-olds *(n=147)* used home delivery versus 45% of 18- to 24-year-olds *(n=253)*. 10% of younger shoppers, on the other hand, chose delivery at a locker versus 3% of older shoppers. Also, delivery at work or to a collection point is more often chosen by younger shoppers.

Base: Total Sample (n=2000)
Question: Q20. Which shipping method did you choose for your last online purchase of the product below?
Note: Question was asked with regards to specific product category.

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SHOPPERS NEED HELP WADING THROUGH INFO, YET THIS IMPROVES OVER TIME

- A similar number as last wave (8 in 10) experience one or more pain points when shopping online, with the biggest hurdle remaining knowing you have the right product.
- Share of shoppers that experienced frustrations with comparing webshops, comparing products and finding product info decreases over time.
- When asked about last online purchase specifically, still, 1 in 4 had some kind of problem.

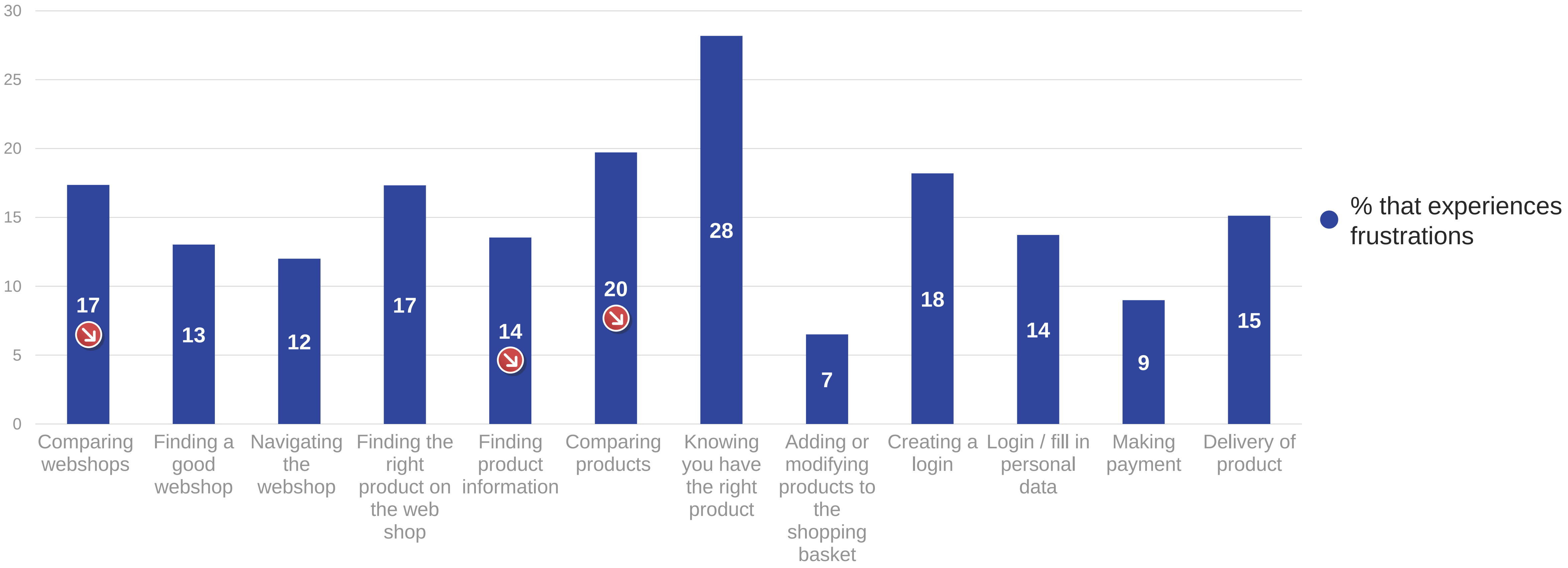
SOME PRODUCTS REMAIN INHERENT TO FRUSTRATION

- Friction remains highest for vehicles, though at a slightly lower level since last wave. Plants remain in second place of having most troubles.
- Video, electronics, travel and pet purchases show considerably less frustrations.

WHAT ARE THE GENERAL PAIN POINTS OF ONLINE SHOPPING?

Most online shoppers do experience some frustrations in one way or another. At first sight, knowing you have the right product remains the biggest concern while modifying the shopping basket creates the least friction. Comparing webshops, finding product information and comparing products, are raised less as a frustration than before.

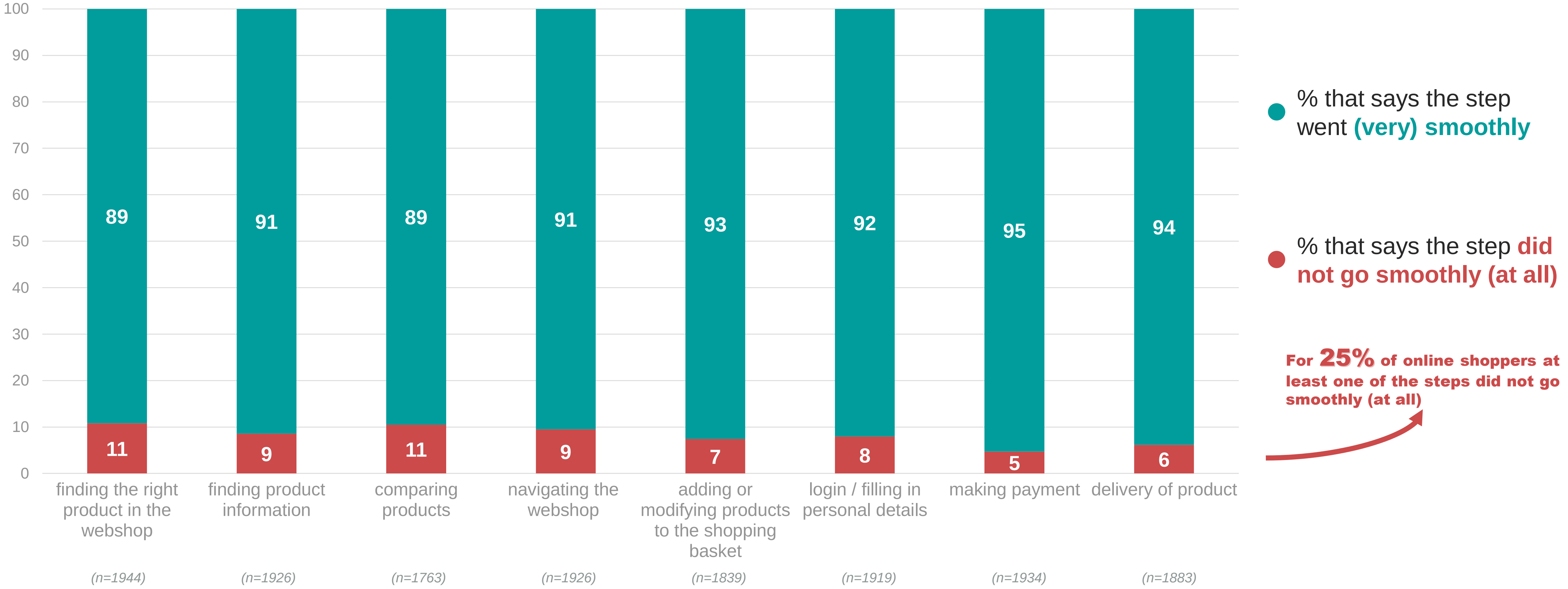
80% **of online shoppers says one or more things frustrate them when shopping online:**



Base: Total Sample (n=2000)
Question: Q22. In general, when you want to make online purchases, what are things that frustrate you / take up a lot of time?

TO WHAT EXTENT WERE THERE PROBLEMS WITH LAST ONLINE PURCHASE?

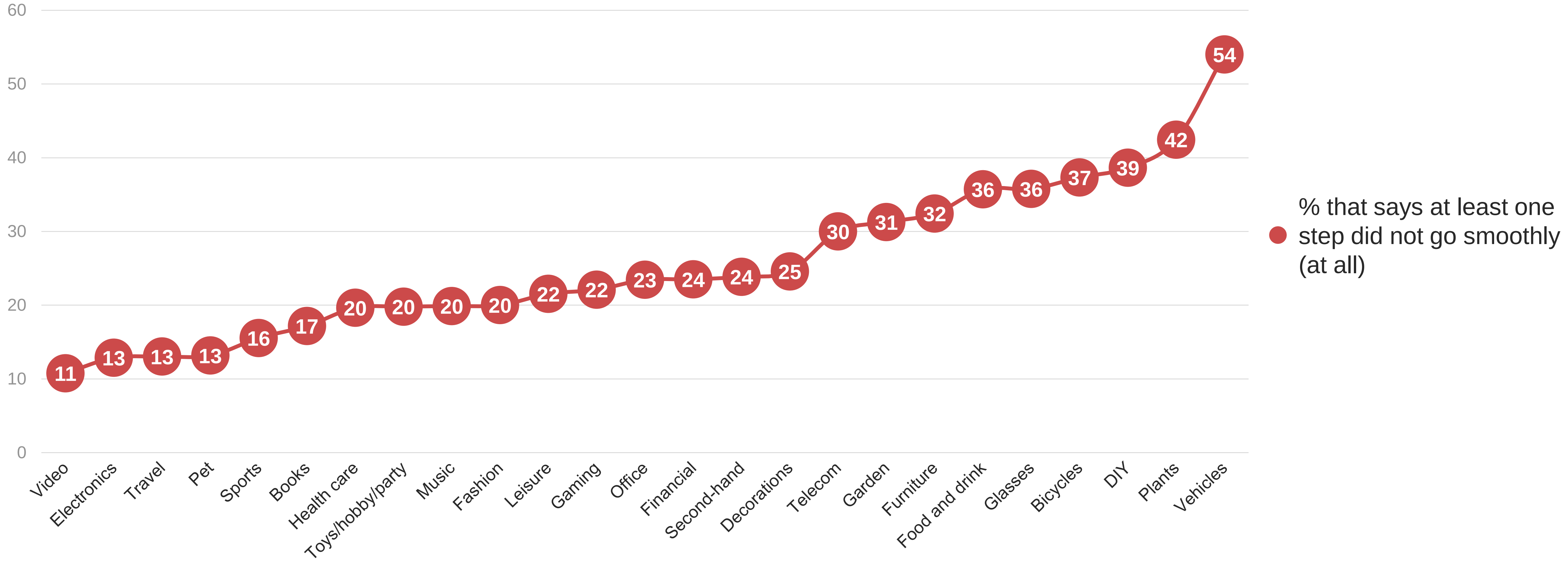
When it comes to their last online purchase, again 1 in 4 shoppers experienced some kind of problem for at least one of the actions below. The first steps in the purchase process still show a bit more friction, compared to adjusting the shopping basket, logging in, payment and delivery. Overall, though, there are still no critical pain points to observe.



Base: Total Sample, excl. not applicable
Question: Q17. How smoothly did your last online purchase of the product below go?
Note: Question was asked with regards to specific product category.

TO WHAT EXTENT WERE THERE PROBLEMS WITH LAST ONLINE PURCHASE, PER PRODUCT TYPE?

Vehicle purchasers again experience the most friction, with somewhat more than 1 in 2 having experienced at least one problem with their last online purchase. Video, electronics, travel and pet purchases show considerably lower friction.



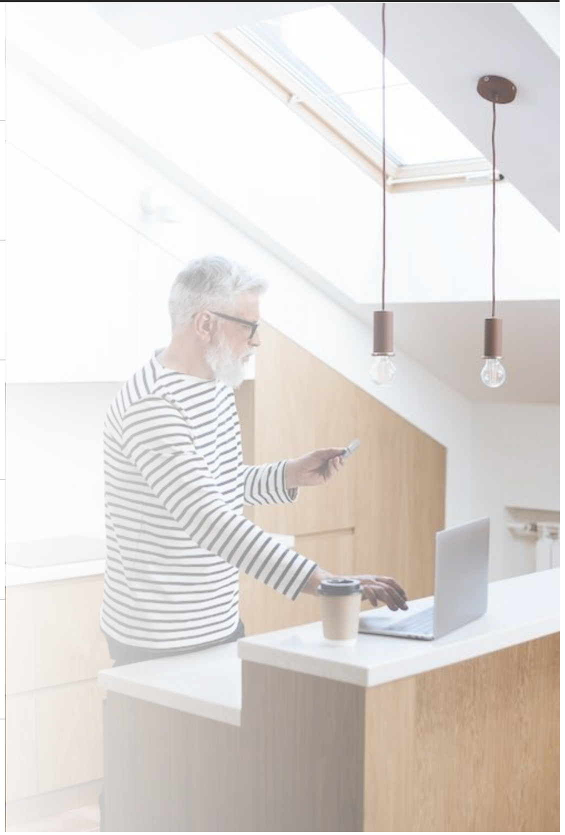
Base: Those that were allocated to a product category (least fill allocation, based on what they bought in the past 12 months) (n=80 per category on average)
Question: Q17. How smoothly did your last online purchase of the product below go?
Note: Result shown is the % of respondents that selected 'did not go smoothly' or 'did not go smoothly at all' for at least one of the steps (finding the right product, or finding information, or comparing products, or …)

WHAT KIND OF PAYMENT PROBLEMS DO ONLINE SHOPPERS EXPERIENCE?

When it comes to payment problems, opinions remain mixed as there is not one problem that really pops out. Having to try different cards or manners is one of the more common problems. A received confirmation without a debited amount on account is now less frequently pointed out as a problem (21% in 2023).

5% **of online shoppers had payment problems with their last online purchase:**

I had to try different cards/methods	29
I could not pay with the payment method I prefer to use	25
I had to wait a long time/later retry	22
The amount went out of my account, but I did not get a confirmation	19
Payment processing was (very) slow	18
Performing payment was not easy	12
I received confirmation, but the amount was not withdrawn from my account	10

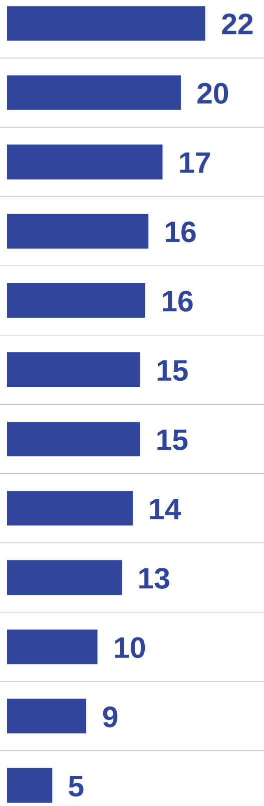


Base: Those that had payment problems with their last online purchase (n=92)
Question: Q18. You say the payment didn't go smoothly (at all). What exactly went wrong?
Note: Question was asked with regards to specific product category.

WHAT KIND OF DELIVERY PROBLEMS DO ONLINE SHOPPERS EXPERIENCE?

The biggest problem for those that said shipping did not go smoothly (at all) remains late delivery. Product damages are again less of a concern.

6% of online shoppers had delivery problems with their last online purchase:



Late delivery	22
I was at home, but the deliveryman said I was not	20
No track & trace information	17
Left at home without appointment	16
Parcel was lost/not arrived	16
High cost	15
Unclear information about delivery	15
Unclear information on note left behind	14
Damage to package	13
Unfriendly delivery driver	10
Delivery to wrong location	9
Damage to product	5

Base: Those that had delivery problems with their last online purchase (n=115)
Question: Q19. You say the delivery of the product below was not smooth (at all) on your last purchase. What exactly went wrong?
Note: Question was asked with regards to specific product category.

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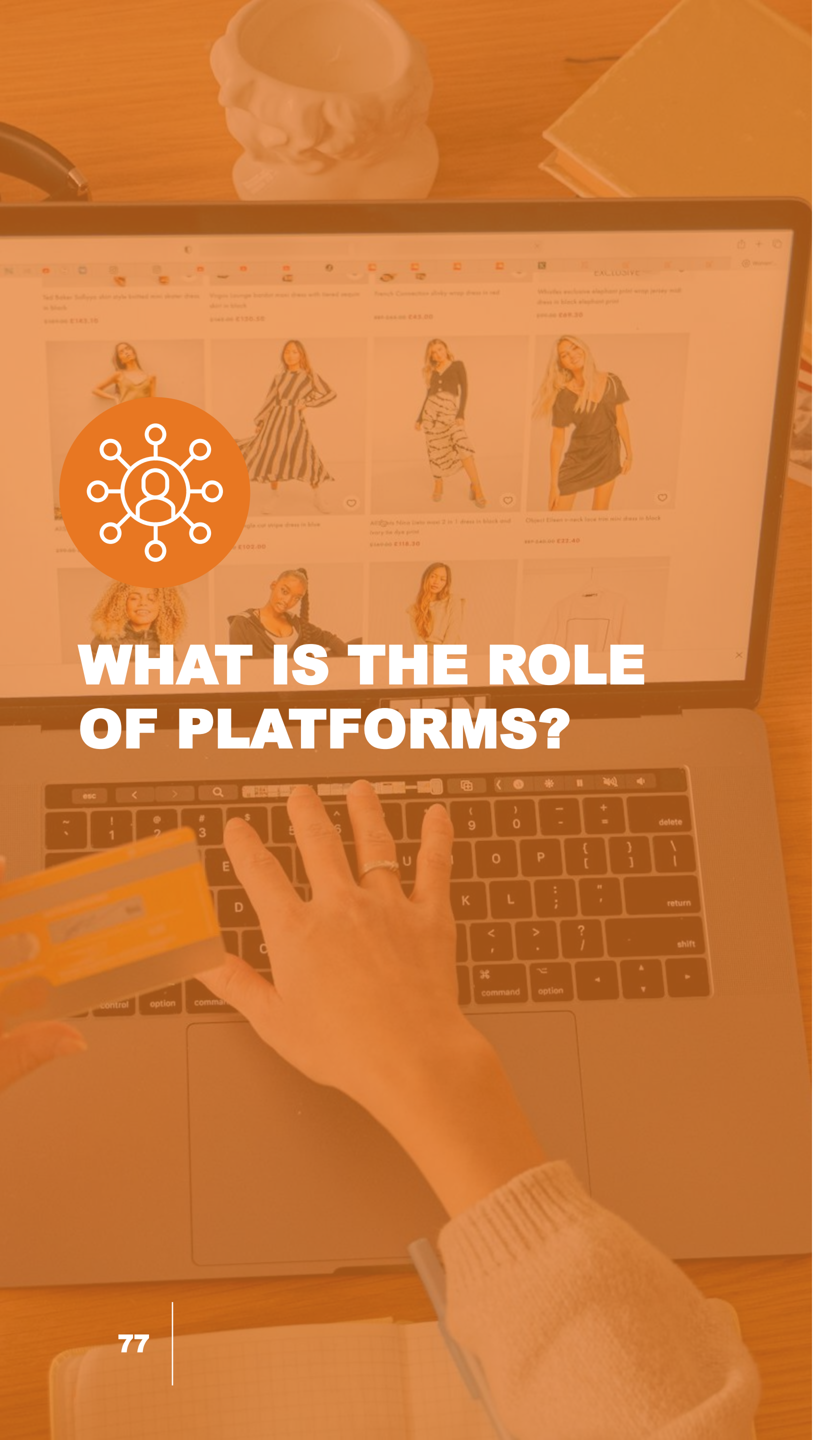


WHAT IS THE ROLE OF PLATFORMS?

PLATFORMS REMAIN WIDELY USED

- 1 in 2 online shoppers mostly buy on platforms, with a stable penetration since last wave. Biggest reason to shop at platforms is price and product variety.
- An increased majority of platform shoppers know that offer is supplemented by external suppliers.
- Those that pay attention to type of supplier are mostly driven by price. Origin of the external provider has become less relevant.

TRUST IS KEY FOR SPECIALIZED WEBSHOP

- Just over 1 in 5 mostly buys on individual or specialized webshops, a similar share to last wave.
- This is driven by trust, guarantee if something goes wrong and quality.

DO SHOPPERS PREFER PLATFORMS OR SPECIALIZED WEBSHOPS?

Belgian online shoppers still mostly buy on platforms, with price, the offer width and free shipping remaining the main reasons why. For 1 in 5, the specialized webshop remains their go-to webshop. Specialized webshops are yet again more often chosen because of trust, guarantees and higher quality compared to platforms.

MOST USED CHANNEL

I MOSTLY BUY ON…

Platforms with several providers	50%
Specialized webshops	21%
No preference	29%

Older shoppers have less of a preference, with 33% of 35–70-year-olds *(n=1351)* having no preference versus 20% of 18–34-year-olds *(n=649)*.

DRIVERS WEBSHOP VS PLATFORM

	PLATFORM (n=1003) – (A)	SPECIALIZED WEBSHOP (n=416) – (B)
Price	54 B	34
Wider range	50 B	21
Free shipping	44 B	22
Trust	32	34
Choice of supplier	27	NA
Service	19	23
Larger number of reviews	19 B	8
Guarantee to go to if something is wrong	17	30 A
More reliable reviews	14	20 A
Higher quality	11	24 A
Know who you are buying from	NA	31

Base: Total Sample (n=2000)
Question: Q31. Indicate which statement best describes you when you generally make purchases online. / Q32. Why do you prefer to buy from a specialized webshop/platform?

DO SHOPPERS PAY ATTENTION TO EXTERNAL SUPPLIERS ON A PLATFORM?

More platform shoppers know that there are external suppliers present on the platform. Still more than half of online shoppers pay attention to the supplier when shopping on a platform. Price is again the biggest aspect to compare on, followed by delivery costs. Origin of shop has become slightly less important when comparing providers to buy from.

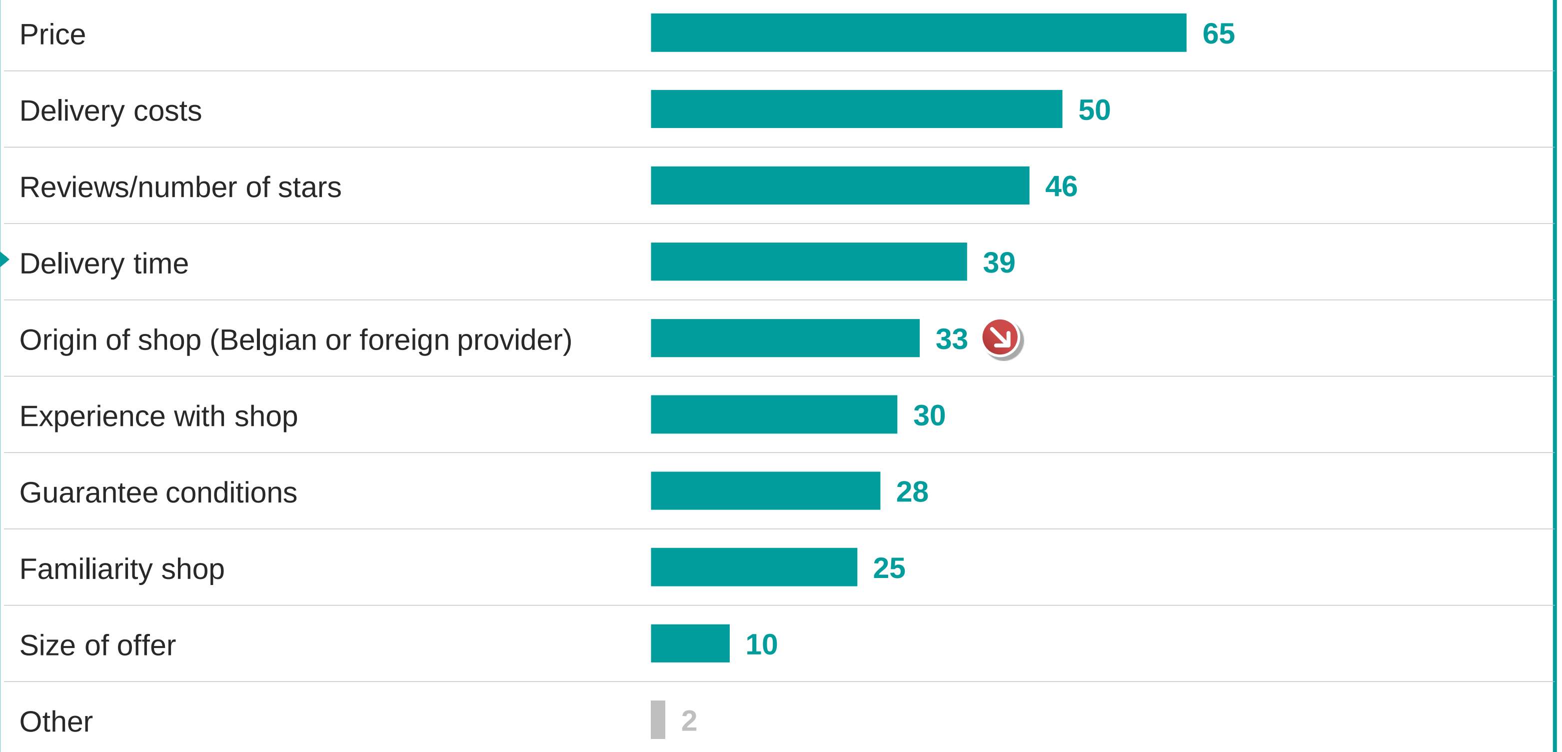
EXTERNAL SUPPLIERS ON PLATFORMS

"Products on platforms can be sold through the platform itself, or through external suppliers"

I know this and pay attention to the supplier	54%
I know this but don't pay attention to the supplier	31%
I did not know this	15%

REASONS FOR PAYING ATTENTION TO TYPE OF SUPPLIER

Base: Online shoppers that pay attention to the supplier on a platform (n=854)



Base: Those that mostly buy on platforms or have no preference (n=1584)
Question: Q33. Products on a platform (e.g. Bol.com, Amazon, etc.) can be sold by the platform itself, by an external provider, or both. Did you know this? / Q34. When you buy on a platform, do you pay attention to which provider you buy from? / Q35. You say you pay attention to which provider you buy from. What in particular do you look at to make your choice?

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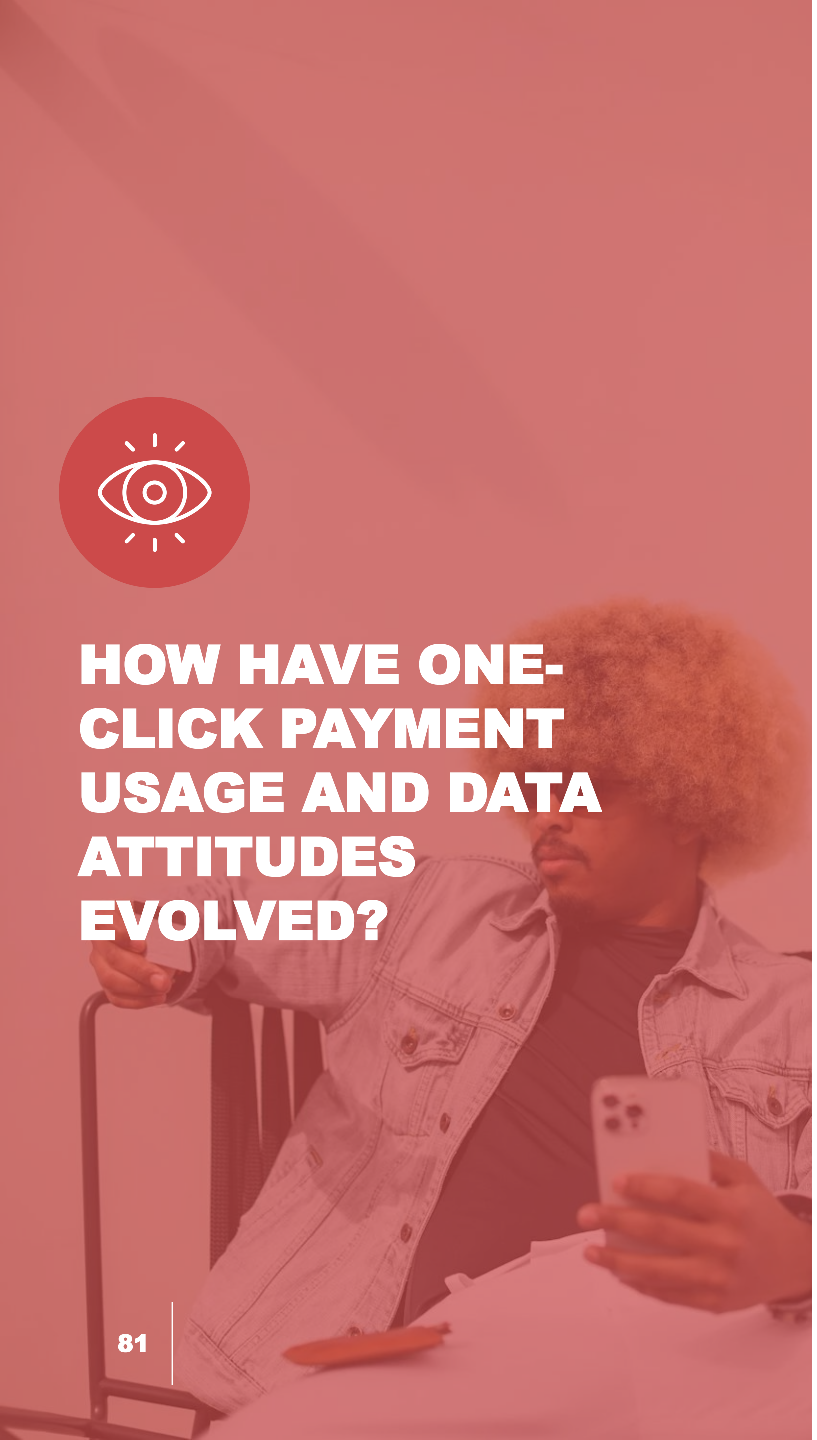


HOW HAVE ONE-CLICK PAYMENT USAGE AND DATA ATTITUDES EVOLVED?

ONE-CLICK PAYMENT PENETRATION REMAINS STABLE

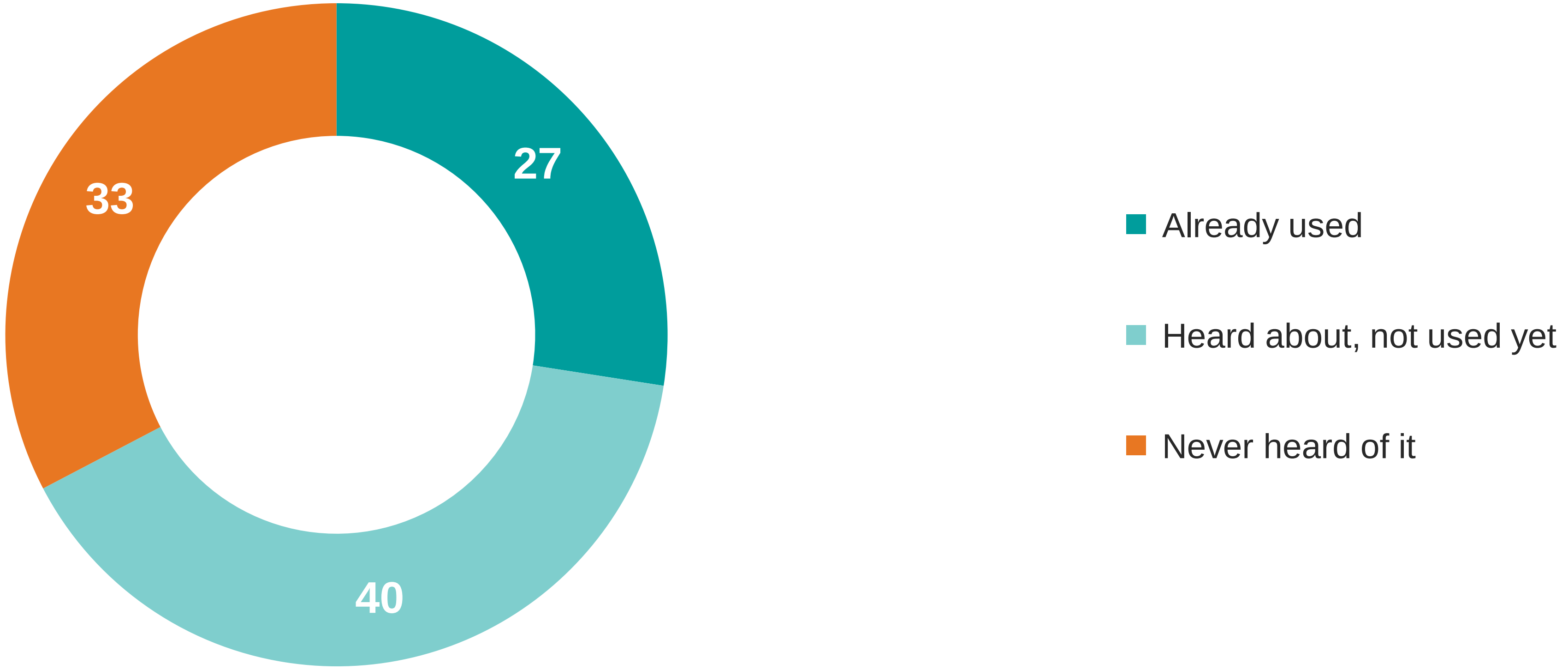
- 1 in 4 has used one-click payment(s) before which is a similar share compared to previous wave.

CONCERN ABOUT DATA REMAINS DIVIDED

- Concern about how data is used online remains mixed (+-50/50 worried, not worried).
- Older shoppers are more worried than younger shoppers.
- Shoppers in Brussels and Wallonia are much more concerned about data than Flemish shoppers.

WHAT IS THE ATTITUDE OF SHOPPERS TOWARDS ONE-CLICK-PAYMENTS?

Usage of one-click payments remains stable.
Still 1 in 4 online shoppers have used one-click payments, while 1 in 3 have never heard of it.

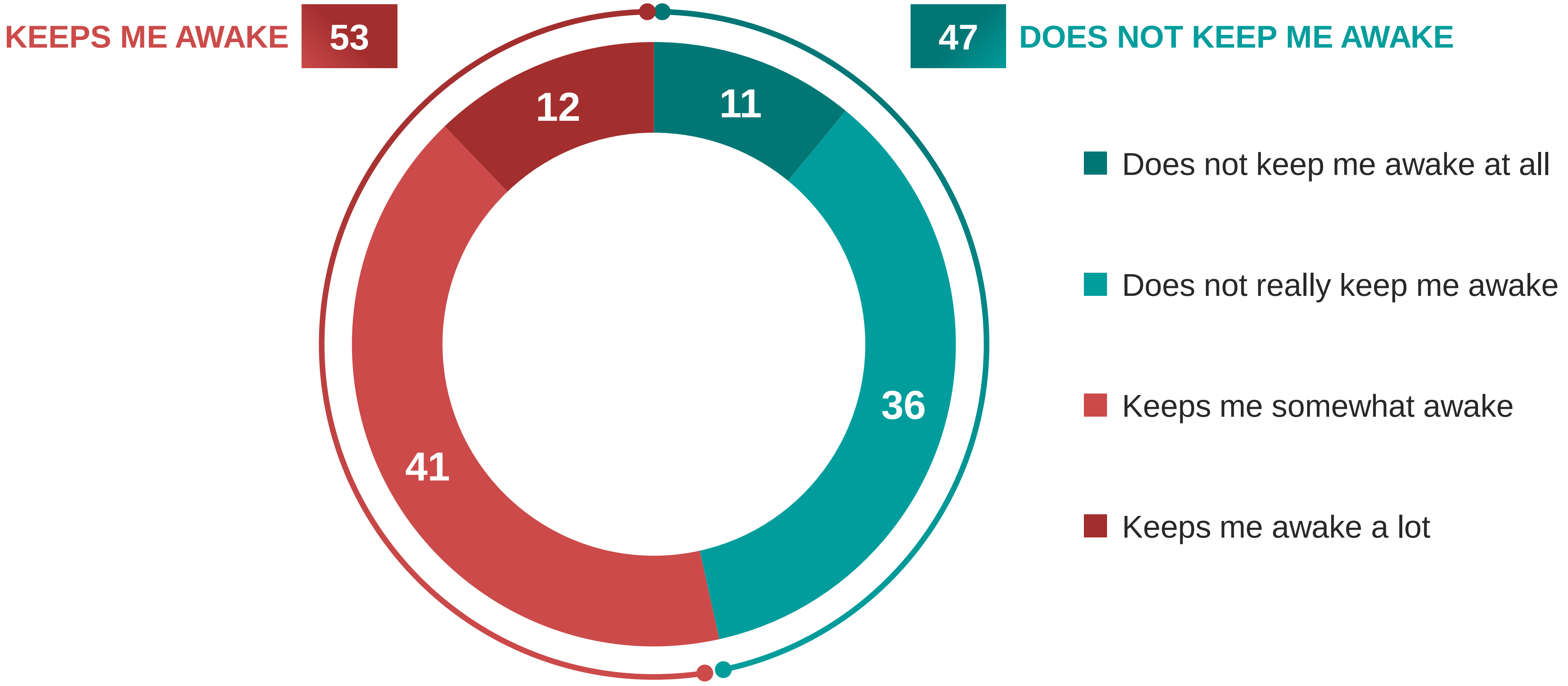


A short description was given to the respondent, so they knew what the product/concept entailed.

Base: Total Sample (n=2000)
Question: Q26. How familiar are you with one-click payments?

ARE SHOPPERS CONCERNED ABOUT THE USE OF THEIR PERSONAL DATA?

Data management attitude remains stable.
Still half of the Belgian online shoppers state that they are worried about how their personal data is used online.



Shoppers between 45- and 54-year-old are more worried about data management, as 59% of 45–54-year-olds (n=403) are worried about their data management, versus 52% of for the other ages (n=1597).

Shoppers from Wallonia and Brussels are more concerned, as 69% of online shoppers from Wallonia (n=685) and 65% of shoppers from Brussels (n=232) are worried about data management, versus 43% for Flemish online shoppers (n=1083).

Base: Total Sample (n=2000)
Question: Q28. To what extent are you concerned about your personal data and how it is used online?

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SUPPOSED NEED FOR INFORMATION ON WEBSHOP ORIGIN

- Majority of online shoppers claim to find it important to know the origin of a webshop, though this has decreased slightly. Main reasons for this remain trust and wish to shop locally. Younger shoppers still care a bit less.
- About 6 in 10 finds it unclear where webshops are based, with many exclaiming they bought something before thinking it came from Belgium when in fact, it did not. The supposed gap between information need and offer on origin thus persists.

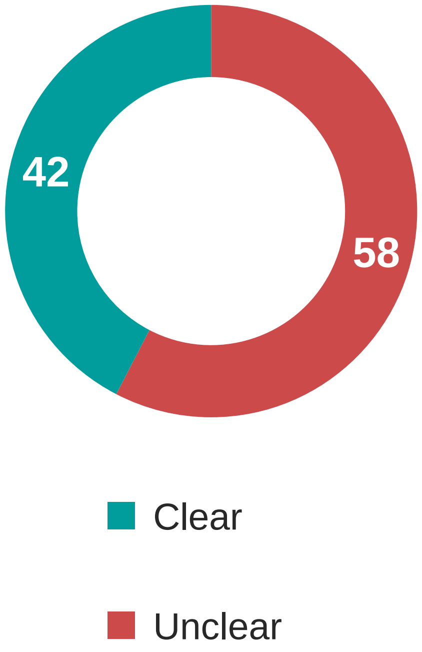
SHOPPING AT ‘HOME’ OR NEARBY PERSISTS

- Just under 1 in 2 always or often shops from Belgian webshops.
- Dutch webshops are second most popular, French third, British webshops are least popular to shop from.
- There is a clear link between language and webshop origin: more people in Brussels and Wallonia shop from French webshops, while more Flemish purchase from Dutch webshops

DO SHOPPERS KNOW THE ORIGIN OF A WEBSHOP?

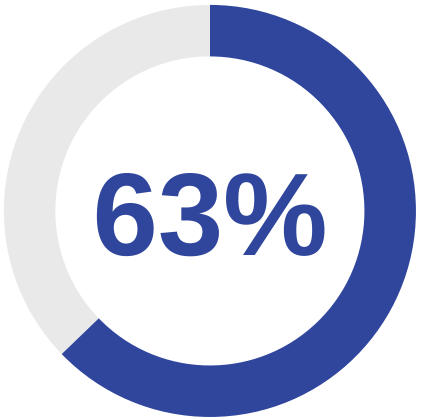
Almost 3 out of 5 thinks that, in general, it is unclear to know in which country the webshop is based, which is consistent with last wave. Many of those who find webshop origin generally unclear, have bought something thinking it came from Belgium, only to find out afterwards it did not.

CLARITY WEBSHOP ORIGIN



EXPECTATION VS REALITY

Base: Belgian online shoppers that find the webshop origin unclear (n=1163)



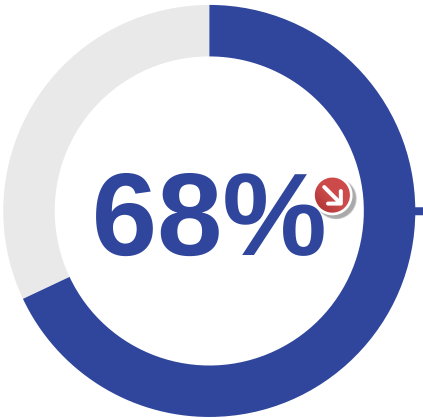
Of consumers sometimes or often buys something **thinking it is from Belgium, only to find out** afterwards **that the product came from abroad**.

Base: Total sample (n=2000)
Question: Q39. Have you ever bought something that you thought was from Belgium, and afterwards upon payment or shipment found out that the product came from abroad? / Q40. To what extent do you think it is clear from which country a webshop comes from / where the webshop is based?

WHY IS IT IMPORTANT TO KNOW THE ORIGIN OF A WEBSHOP?

Nearly 7 in 10 online shoppers find it important to know the origin, which is lower share compared to last wave. The main reason for this remains to properly estimate the trustworthiness of the webshop.

IMPORTANCE ORIGIN



Of online shoppers **find it important to know the origin** of the webshop

Older shoppers find webshop origin more important, with 70% of 35–70-year-olds (n=1351) finding it important versus 64% of 18–34-year-olds (n=649).

People from Brussels and Wallonie also find the origin of a webshop more important, as 73% of Wallonia and Brussels *(n=917)* versus 65% from Flanders *(n=1083)* find it important.

REASONS WHY IMPORTANT

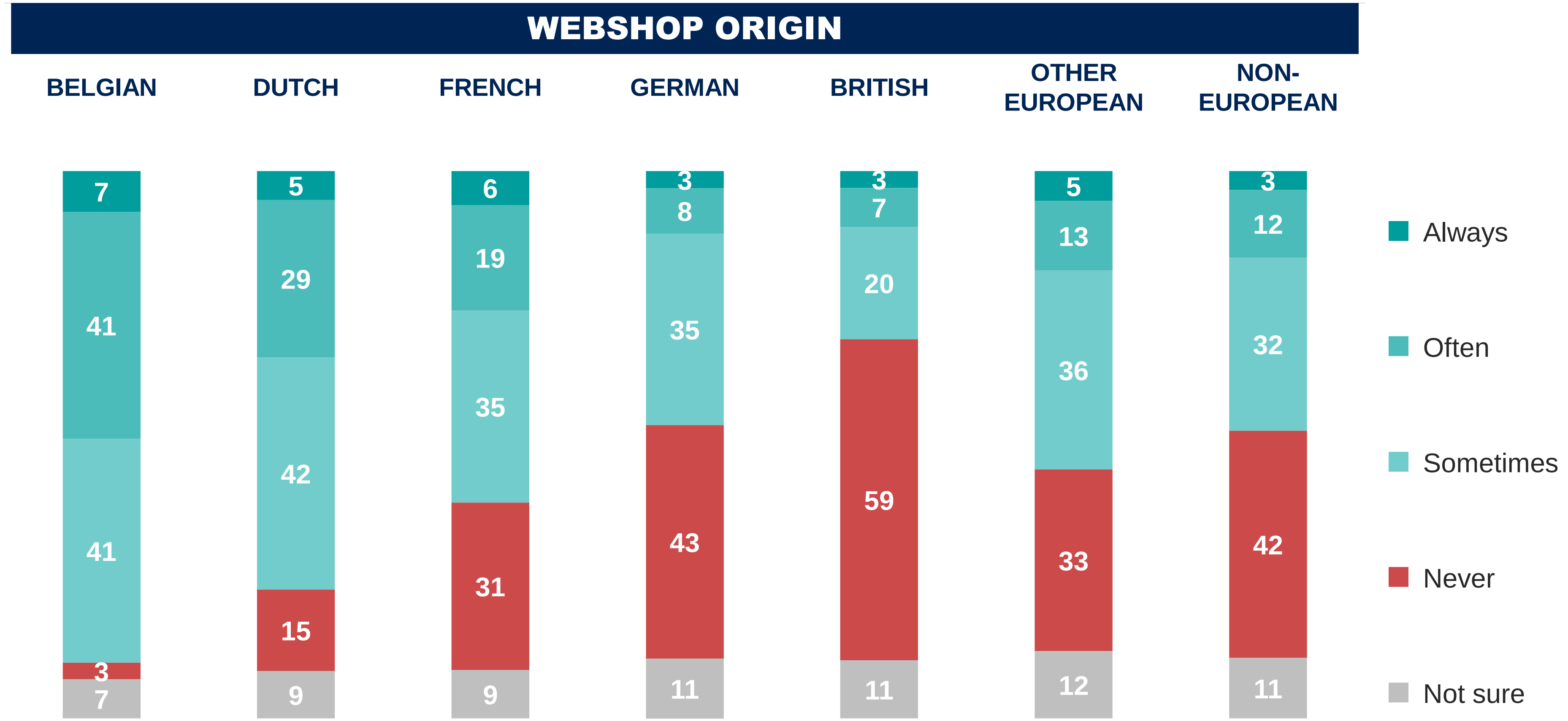
Base: Belgian online shoppers that think it is important to know the origin of the webshop (n=1368)

Faster shipping is more important for younger shoppers, as 33% of 18–34-year-olds (n=418) find it important versus 22% of 35–70-year-olds (n=950).

Base: Total sample (n=2000)
Question: Q41. To what extent do you think it is important to know from which country a webshop originates / where the webshop is located? / Q42. Why do you think it is important to know where a webshop is located?

FROM WHICH WEBSHOPS DO SHOPPERS BUY GOODS AND SERVICES?

Belgian webshops remain the most popular among Belgian online shoppers, closely followed by Dutch webshops. British webshops are again actively bought from by only 3 in 10 shoppers, which is even less than non-European webshops. Results are very similar to last wave.



Dutch webshops are more often considered by Flemish shoppers, as 91% of Flemish shoppers (n=1083) sometimes, often or always shop at Dutch webshops versus 63% of shoppers from Brussels (n=232) and 53% from Wallonia (n=685).

French webshops are more often considered by shoppers from Wallonia and Brussels, as 86% of shoppers from Brussels (n=232) and 90% from Wallonia (n=691) sometimes, often or always shop at French webshops versus 39% of Flemish shoppers (n=1083).

Base: Belgian online shoppers (n=2000)
Question: Q43. Indicate to what extent you make online purchases from the types of online shops listed below.

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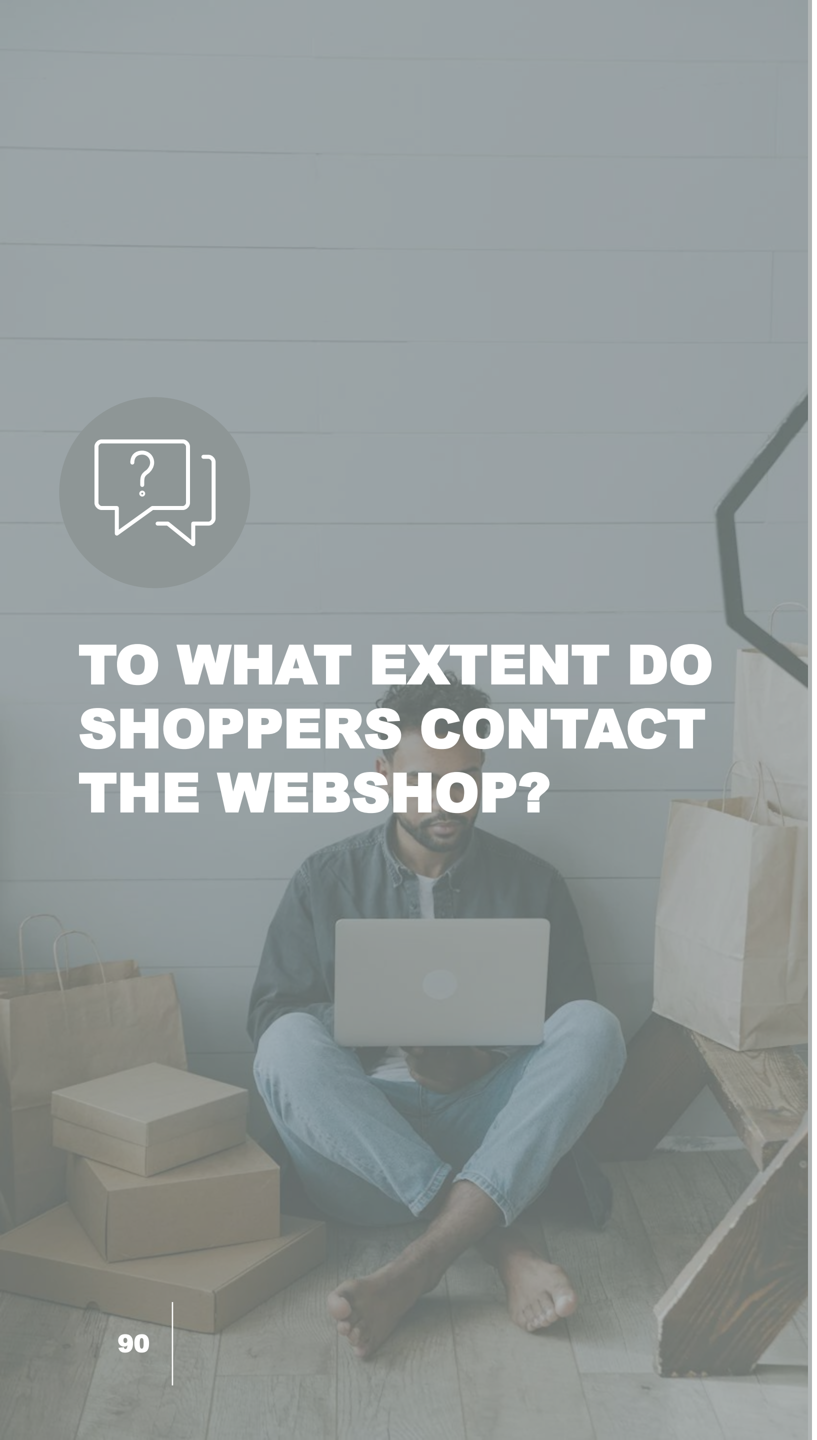


TO WHAT EXTENT DO SHOPPERS CONTACT THE WEBSHOP?

WEBSHOP IS MAINLY CONTACTED BEFORE PURCHASE

- 1 in 3 has contacted a webshop sometime in the past, typically before the purchase was made.
- Main reasons to contact the webshop are to acquire additional advice or (product) information

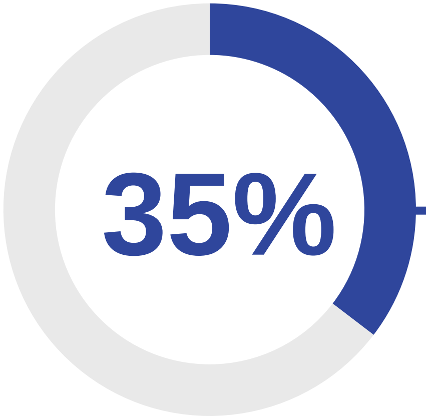
SPEED , COMPETENCY AND CLARITY, THE GOLDEN TRIO OF COMMUNICATION

- Speed of the response and clarity of the given information drive webshop contact satisfaction
- Incompetency, followed by a slow response drive dissatisfaction
- Speed, competency of the contact person and clarity of the information give are key to maximize client satisfaction with regards to communication

DO SHOPPERS CONTACT THE WEBSHOP?

Over 1 in 3 online shoppers have contacted a webshop before concerning their purchase. Shoppers contact the webshop more before their purchase than after their purchase. Asking for advice is for 1 in 4 the biggest reason to contact a webshop.

CONTACT WEBSHOP



Have contacted the webshop

Contacting a website is higher among the youngest and oldest shoppers, 44% of 18–24-year-olds *(n=253)* and 41% of 55–70-year-olds *(n=514)* has ever contacted a webshop, while 30% of 25–54-year-olds ever did.

Contacting a webshop is also slightly higher among shoppers from Brussels, as 46% of shoppers from Brussels (n=232) versus 31% from Flanders (n=1083) and 39% from Wallonia (n=685) ever contacted a webshop.

Webshops are more often contacted for flowers & plants and food & drink, (56% and 57%).

REASONS FOR CONTACT WEBSHOP

Base: Belgian online shoppers that have contacted the webshop (n=710)

Before purchase	63
Asking for advice	24
Obtaining product information	18
Obtaining other information	17
Technical problems website	11
Problems with payment	9
After purchase	42
Problems with shipment	14
Request for return	12
Giving a compliment	12
Problems with returns	7
Bad customer service experience	5

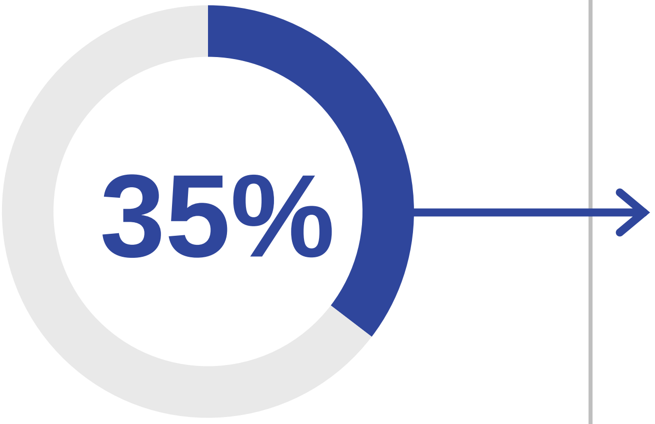
18–44-year-olds more often contact a webshop for problems with payment and technical problems, 13% of 18–44-year-olds (n=367) vs. 4% of 45–70-year-olds (n=343) and 17% vs. 6%.

Base: Total sample (n=2000)
Question: Q44. Have you ever contacted a webshop for online purchases?
Q45. Why did you contact the webshop?

HOW DO SHOPPERS CONTACT THE WEBSHOP?

E-mail and phone are the most popular ways to contact a webshop.
Social media and the physical store are used less.

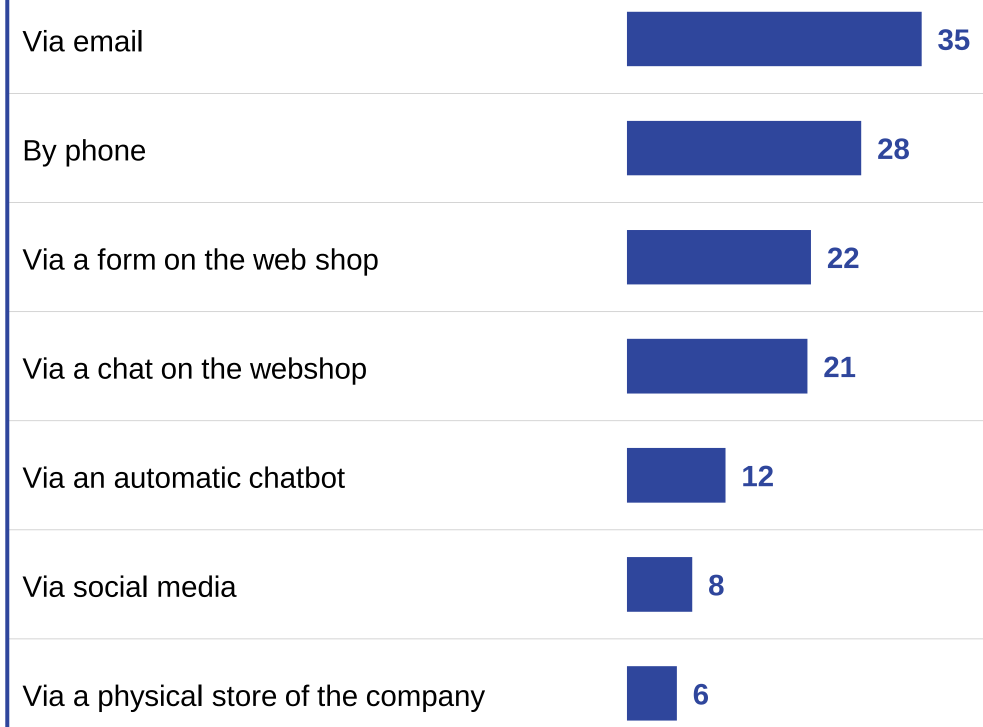
CONTACT WEBSHOP



Have contacted the webshop

CHANNEL WEBSHOP CONTACT

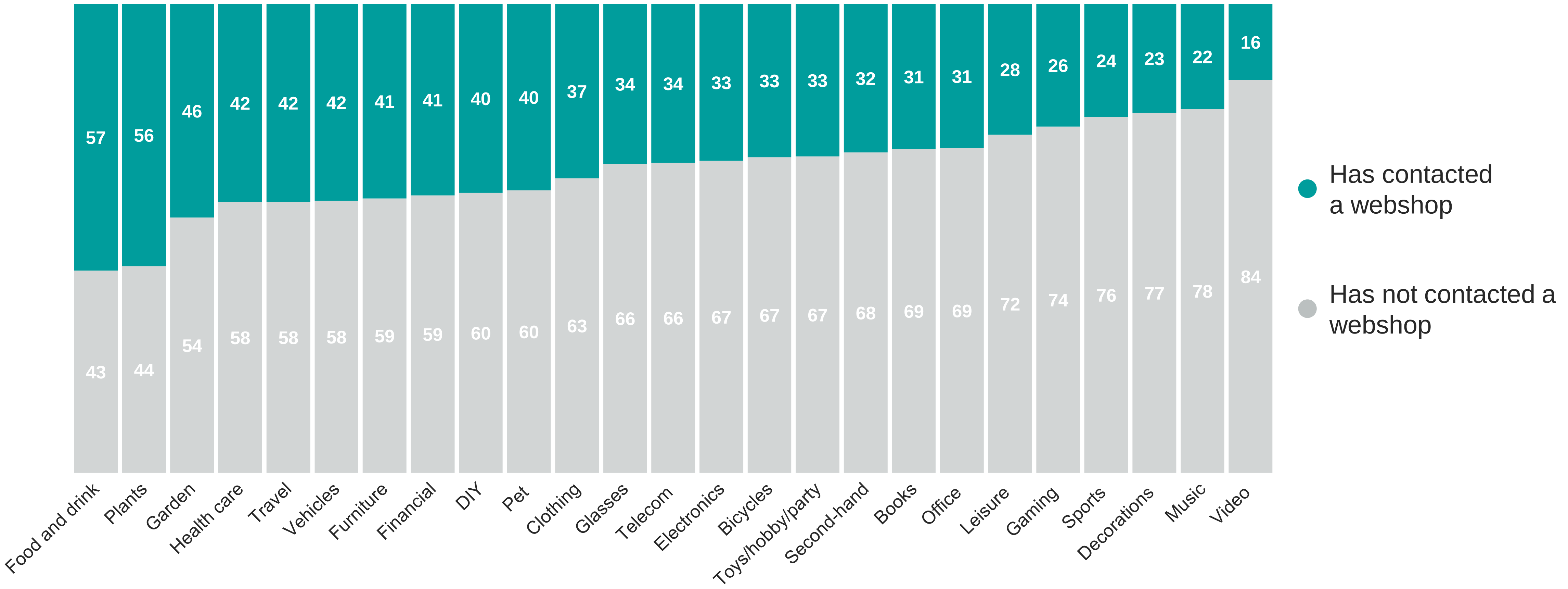
Base: Belgian online shoppers that have contacted the webshop (n=710)



Base: Total sample (n=2000)
Question: Q44. Have you ever contacted a webshop for online purchases?
Q46. In what way did you contact the webshop?

DO SHOPPERS CONTACT THE WEBSHOP?

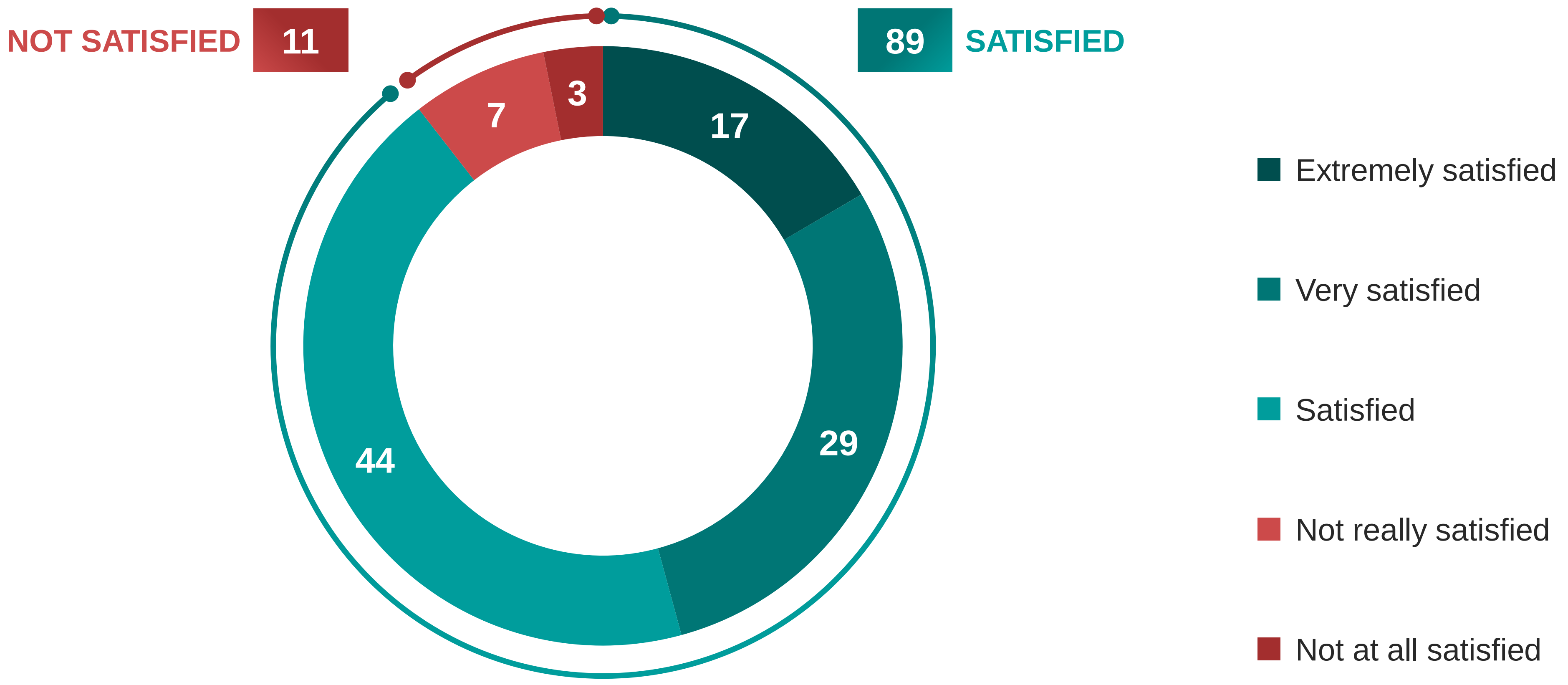
Food and drink, as well as plants, show least contact with the webshop.
For purchases of video, music, decorations and sport shoppers more often contact the webshop.



Base: Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months)
Question: Q44. Have you ever contacted a webshop for online purchases?

ARE SHOPPERS SATISFIED WITH THE CONTACT OF THE WEBSHOP?

Almost 9 in 10 shoppers are satisfied with the contact they had with the webshop.



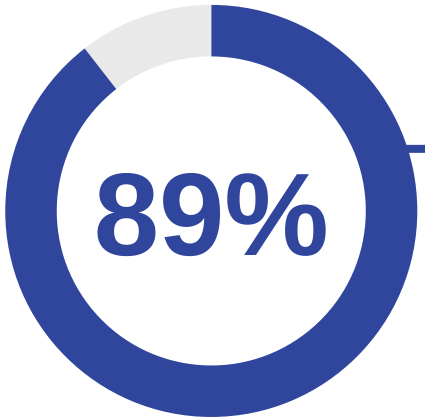
18-to-24-year-olds are more often not satisfied, as 19% of online shoppers between 18 and 24 years old (n=112) are not satisfied with the contact, versus 9% for of 25-to-70-year-old shoppers (n=598).

Base: Belgian online shoppers that have contacted the webshop (n=710)
Question: Q47. How satisfied were you with the contact with the shop?

WHY ARE SHOPPERS SATISFIED WITH THE WEBSHOP CONTACT?

Quickly provided answers/solutions and clear information drive satisfaction. In fact, 2 in 5 indicates either as a reason why they were satisfied with the contact. The ease of contact and friendliness of the employees, also plays an important role in the contact satisfaction.

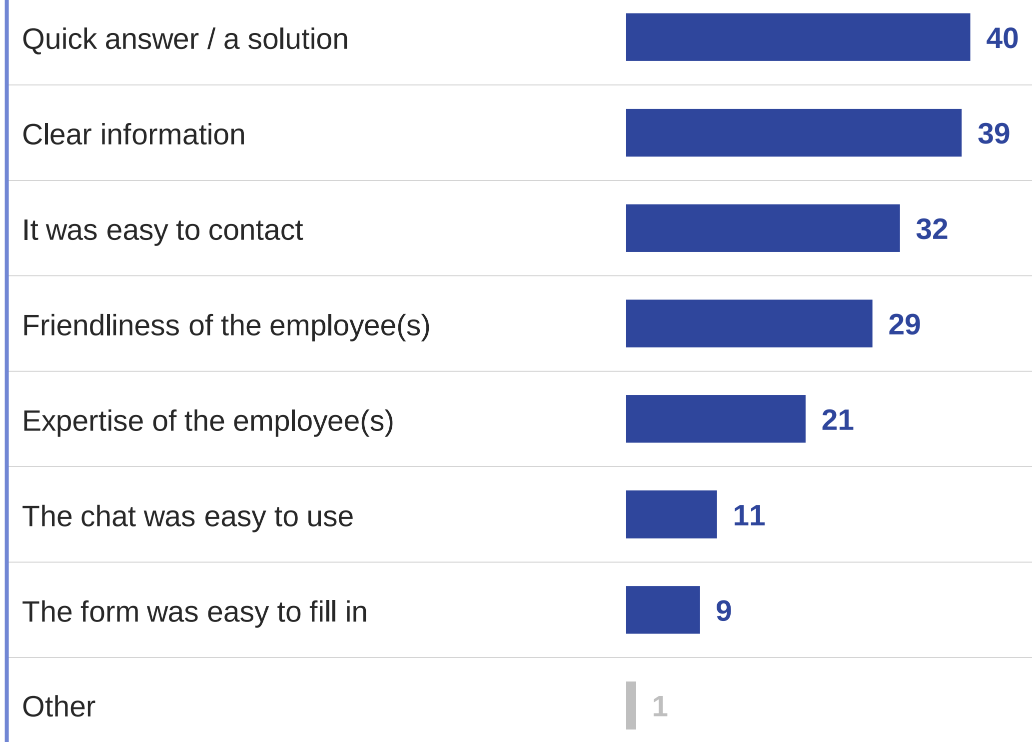
SATISFIED



Was satisfied with the contact

WHY SATISFIED

Base: Belgian online shoppers that have contacted the webshop and were satisfied (n=635)

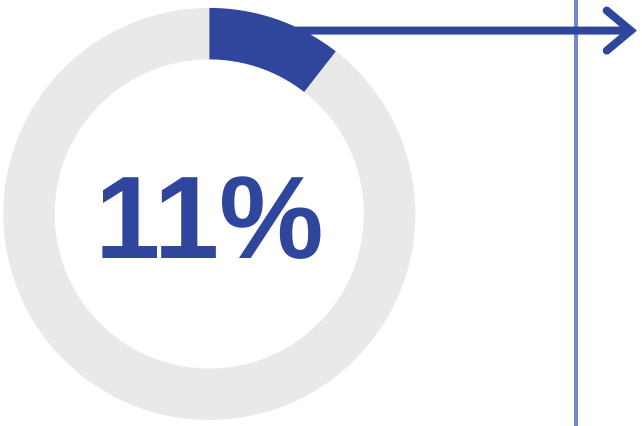


Base: Belgian online shoppers that have contacted the webshop (n=710)
Question: Q47. How satisfied were you with the contact with the shop? / Q48. Why were you satisfied with the contact with the shop?

WHY ARE SHOPPERS DISSATISFIED WITH THE WEBSHOP CONTACT?

Incompetence of employees and slow response time, on the other hand, drive dissatisfaction. Speed is present in both the dissatisfiers and satisfiers, making it a key area to optimize in to maximize consumer satisfaction with regards to communication.

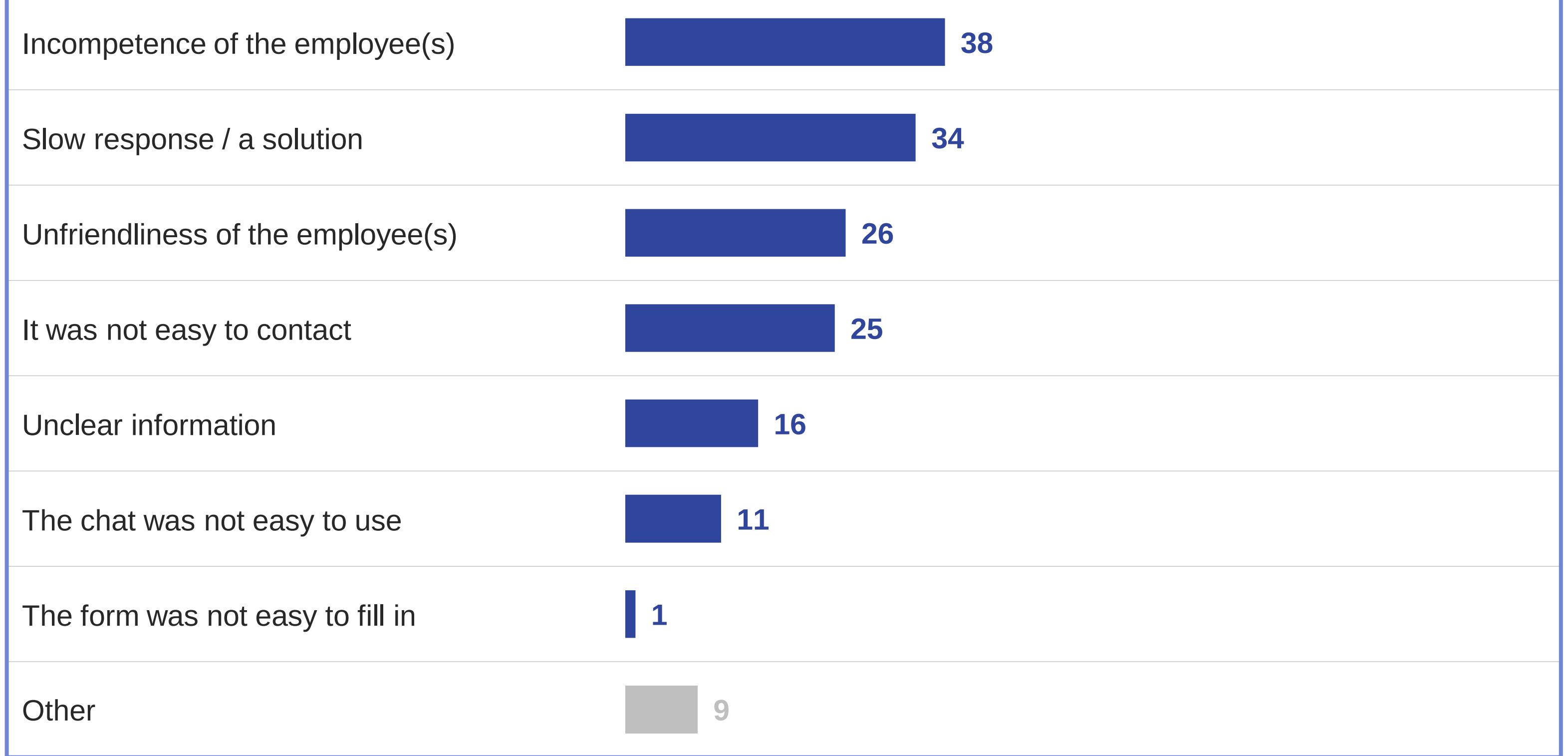
DISSATISFACTION



Was dissatisfied with the contact

WHY DISSATISFIED

Base: Belgian online shoppers that have contacted the webshop and were dissatisfied (n=75)



Base: Belgian online shoppers that have contacted the webshop (n=710)
Question: Q47. How satisfied were you with the contact with the shop? / Q49. Why were you dissatisfied with the contact with the shop?

KEY FINDINGS

3

ONLINE AND OFFLINE COEXIST

Video, music and travel remain staple online purchases, while food/drink, flowers/plants, and vehicles are still predominantly bought offline. For toys/hobby/party articles and food/drinks, online purchasing even decreased. The share of Belgians buying online out of habit has increased, especially for strongly "online" categories like video, gaming, music. This ties to a rising number who purchase without searching for information first.

PRICE REMAINS KEY TO ENTER CONSIDERATION SET

Price is fundamental throughout the online path to purchase - it's a main reason for searching information, a top factor in webshop choice, and the biggest driver for comparing webshops. For 7%, price is the only aspect they look at when choosing a webshop.

SATISFACTION DRIVES LOYALTY

Satisfaction is key to stay in the generally small consideration set. Most have a select few websites they loyally return to, with nearly half of online shoppers finding it important to have shopped with a webshop before. Satisfaction is a main reason for not considering other webshops. For fashion and gaming, a higher share now has no fixed go-to webshop compared to last year, signaling decreased loyalty for these categories.

SPEED AND QUALITY ARE KEY IN CONTACT

About 1 in 3 online shoppers have contacted a webshop about a purchase, mainly to get advice or product information before buying. Satisfaction with this contact is driven by quick response times, competent employees and clear information, while slow responses and perceived incompetence cause dissatisfaction.

PLATFORMS HOLD STRONG

Half of online shoppers do most purchases through general webshops/platforms, driven by price, offer depth and free shipping. For their last online purchase specifically, just under 4 in 10 bought via a platform. Most are aware the offer includes external suppliers and half pay attention to this. Specialized webshops need to convince online shoppers with trust, quality and guarantees.

HURDLES PERSIST BUT SOME ARE DECREASING

While 8 in 10 still experience online shopping pain points, frustrations with comparing webshops/products and finding product info have lessened. Certain categories like vehicles remain more friction-prone than others.

SHOPPERS STILL CLAIM TO FIND WEBSHOP ORIGIN IMPORTANT

A majority says that knowing the webshop's country of origin is important (slight decrease) for trust and desire to shop locally, but over half find this info generally lacking. There is an alleged gap between the demand for and supply of clear origin information.

PAYMENT OFFER IMPACTS CONVERSION

7 in 10 online shoppers prefer one payment method, while in reality 4 in 10 use one method only. 1 in 4 would abandon their purchase if preferred payment options are unavailable - a significant potential impact on conversion. Bancontact strengthened its position as most used and preferred, while usage of Klarna and Apple Pay increased. For delivery, home delivery lost some ground to collection points, especially among younger shoppers.

MORE INFORMATION?

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GAME CHANGERS

BE SURE. GO FURTHER.

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