

E-COMMERCE SURVEY 2026

Prepared for COMEOS

May 2026

comeos

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2.1 INTRO

- What do people shop online?

2.2 ONLINE PATH TO PURCHASE

- 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 experience?

2.3 AD HOC

- What is the role of platforms?
- How have one-click payment usage and data attitudes evolved?
- How important is webshop origin?
- How are Asian webshops disrupting the Belgian e-commerce market?
- To what extent do shoppers contact the webshop?
- What do shoppers think of the proposed innovations?

3 KEY FINDINGS

INTRODUCTION

01

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.

In 2024, the second wave of this study was successfully executed, offering evolution insights into key topics as well as new insights with regards to consumer communication.

In 2025, the third wave of this study was conducted, offering again evolution insights into key topics, and also fresh findings concerning shopper behaviour on Asian webshops, AI, and attitudes towards specific applications.

In the fourth wave, executed in 2026, **five innovative e-commerce concepts** were evaluated by the Belgian e-commerce shoppers, allowing retailers to be **inspired on the do's & don'ts**, along sides evolutions and trends in the purchase journey.



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?
 - To what extent do they search for information?
 - Where do they buy?
 - ...
- What is the role of platforms?
- What is the attitude towards and usage of certain digital concepts?
- To what extent do shoppers contact the webshop?
- What is the attitude towards webshop origin?
- To what extend do shoppers buy via Asian webshops?
- How do shoppers feel about potential shopping innovations?

Methodology



Sample Description

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



Sample Size

N = 2010

- Sample size of 2000 was obtained for all three previous waves



Quota

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



Data Collection Method

Online interviews



Avg. Interview Duration

15 minutes

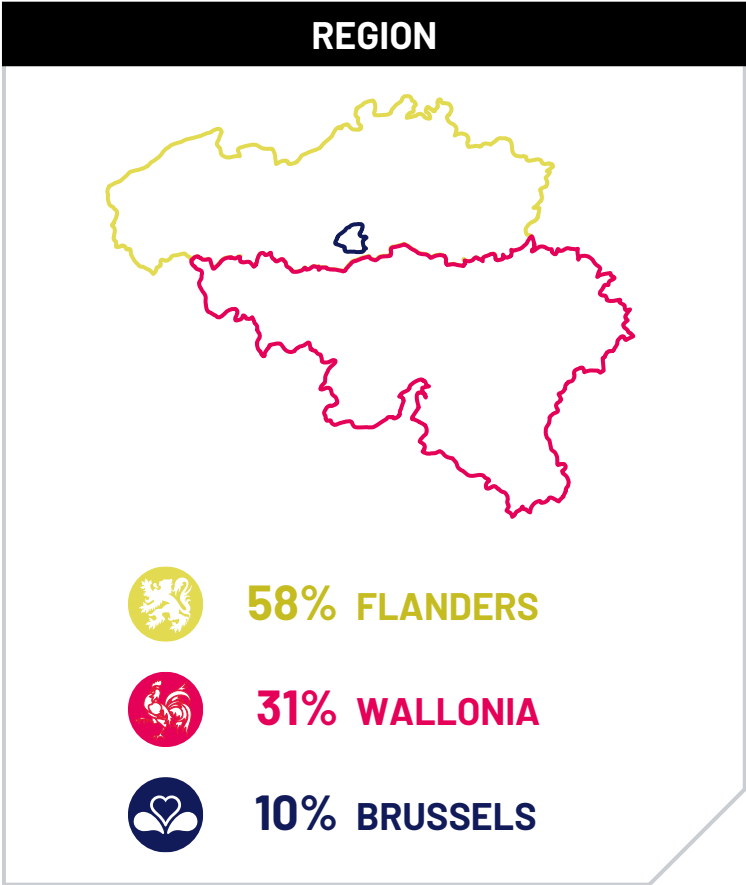
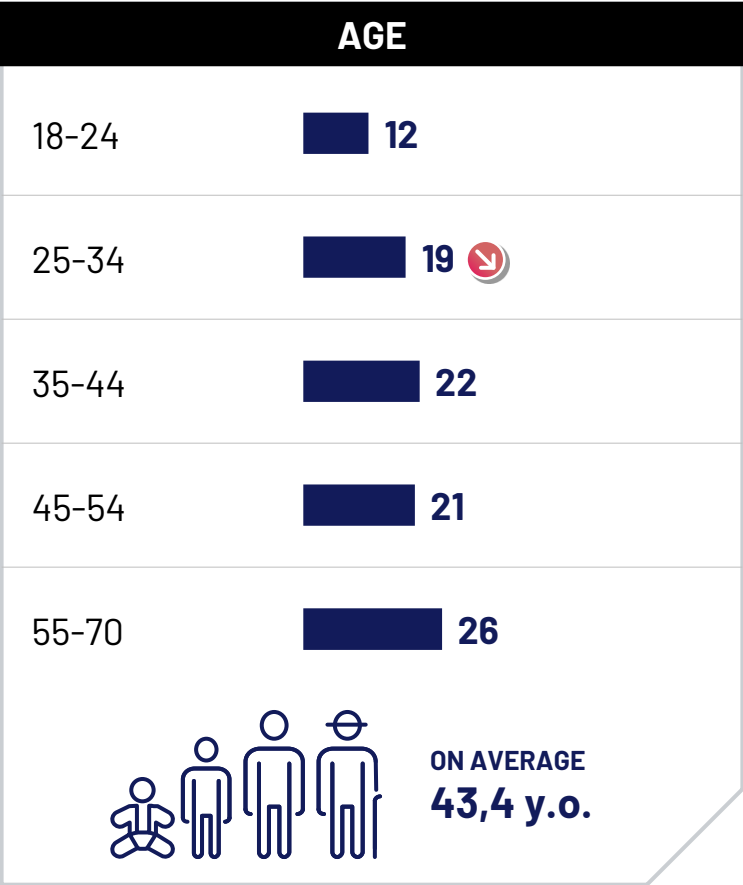
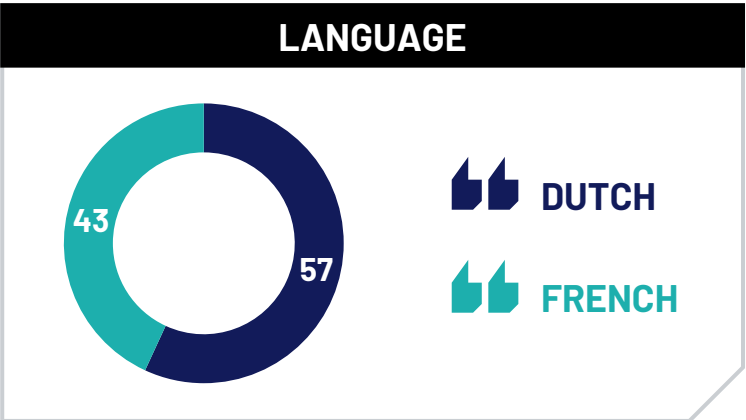
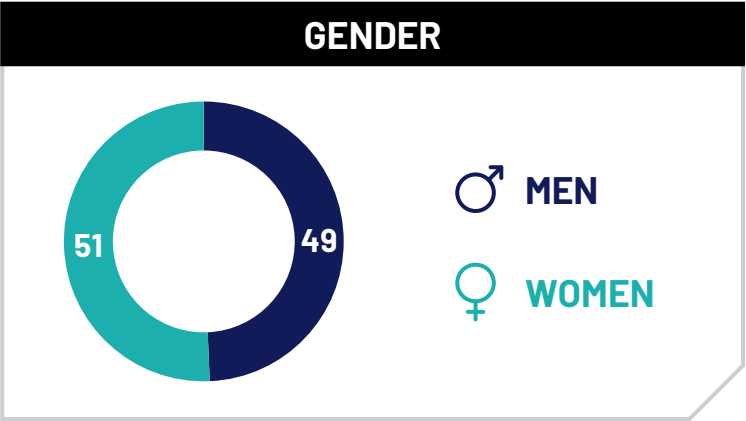


Fieldwork Period

Wave 1: 08/03/2023 – 20/03/2023
Wave 2: 20/03/2024 – 29/03/2024
Wave 3: 11/03/2025 – 27/03/2025
Wave 4: 12/03/2026 – 31/03/2026

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.



i The incidence rate was 88%, meaning that more than 8 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=2010)
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. jewelry)
	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

02

INTRO



WHAT DO PEOPLE
SHOP ONLINE?

ONLINE PATH TO PURCHASE



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 AND DATA
ATTITUDES EVOLVED?



HOW IMPORTANT IS
WEBSHOP ORIGIN?



HOW ARE ASIAN
WEBSHOPS DISRUPTING
THE BELGIAN
E-COMMERCE MARKET?



TO WHAT EXTENT DO
SHOPPERS CONTACT
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INNOVATIONS

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INNOVATIONS



WHAT DO PEOPLE SHOP ONLINE VERSUS OFFLINE?

WHAT'S NEW?

-  **Decrease** in the **online** purchase of categories like **vehicles, plants, and food & drink**
-  **Increase** in the purchase of **digital and entertainment-related products** such as **video, music, and travel**.

A man is sitting on a light-colored sofa in a living room. He is holding a smartphone in his right hand, looking at the screen. A laptop is open on his lap, and a pair of headphones is resting on the sofa next to him. In the background, there is a white shelving unit and a window with curtains. The entire image has a blue tint.

ALMOST 9 IN 10

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

WHAT PRODUCTS DO ONLINE SHOPPERS PURCHASE & HOW?

BIG GAP BETWEEN ONLINE AND TOTAL PURCHASING

SMALL GAP

E-COMMERCE HAS HIGHEST PENETRATION GROWTH POTENTIAL IN THESE CATEGORIES
Food and drink
Plant
DIY
Health care
Glasses

MODERATE TO HIGH PENETRATION INCREASE POSSIBLE
Pet
Decorations
Vehicles
Furniture
Fashion
Sports
Garden
Electronics
Books
Bicycles
Office

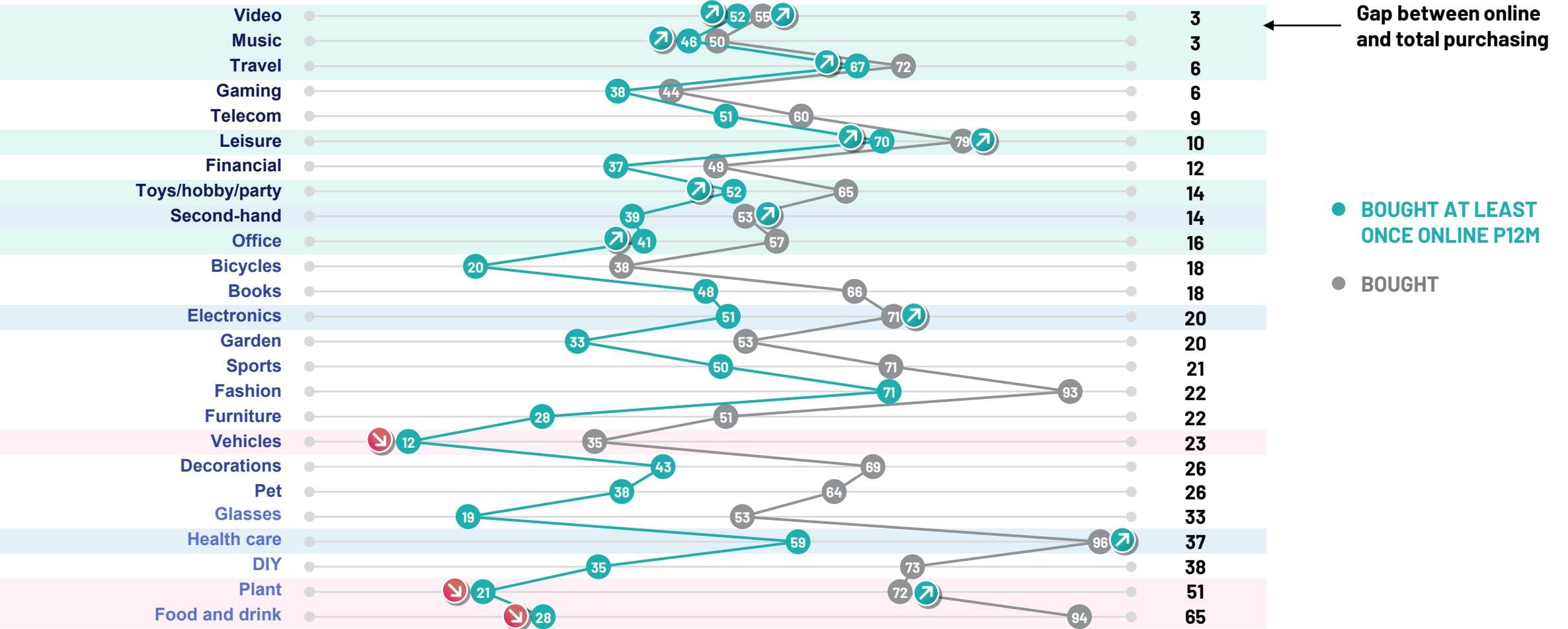
E-COMMERCE IS FULLY EMBEDDED IN THESE CATEGORIES
Second-hand
Toys/hobby/party
Financial
Leisure
Telecom
Gaming
Travel
Music
Video

Base: Total sample (n=2010)
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 & HOW?

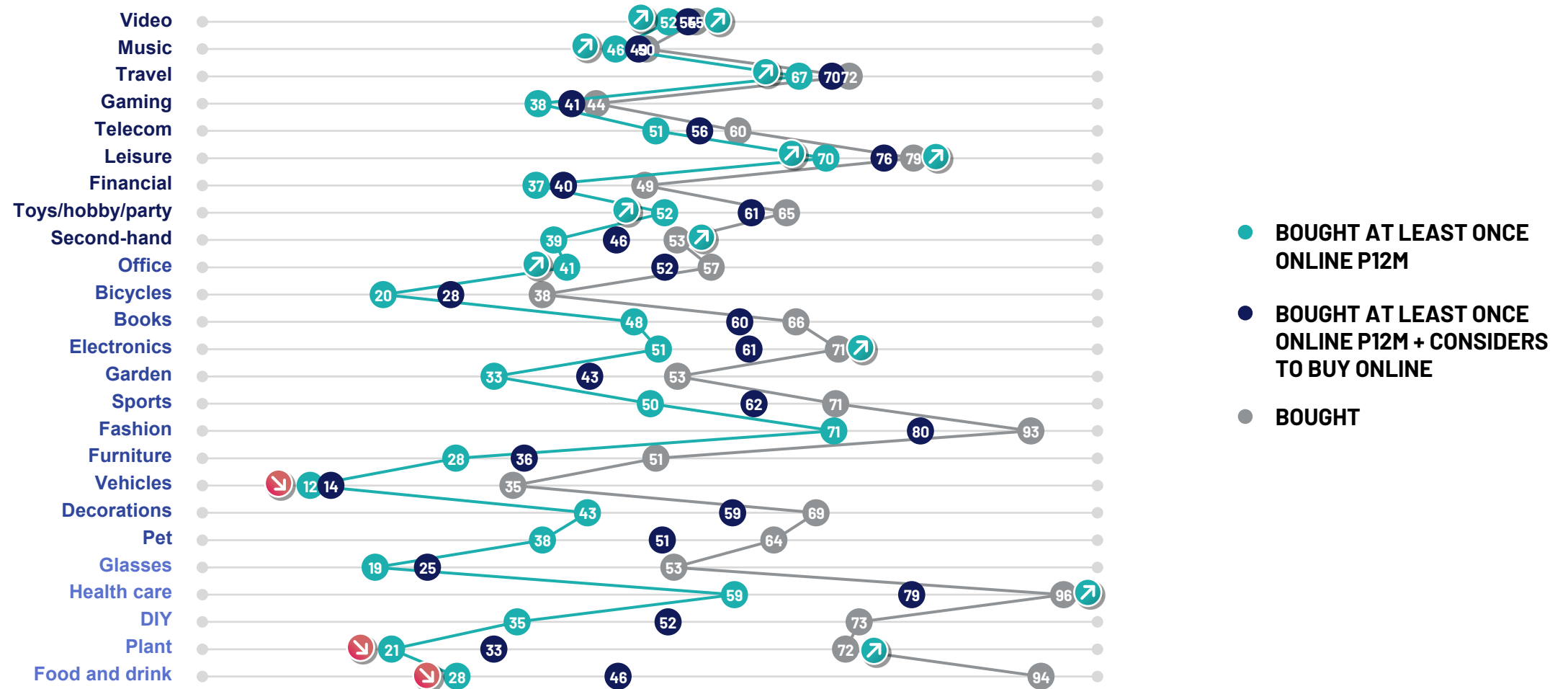
Overall, the order of categories bought online vs offline remains stable, yet certain trends are noticeable. Online purchases of vehicles, plants and food and drinks have decreased, while increases are reported for video and leisure (total + online). Furthermore, online purchases for music, travel, toys and office supplies are noted as well.



Base: Total sample (n=2010)
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 (CONSIDER TO) PURCHASE & HOW?



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?

INTRO



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WHAT'S NEW?

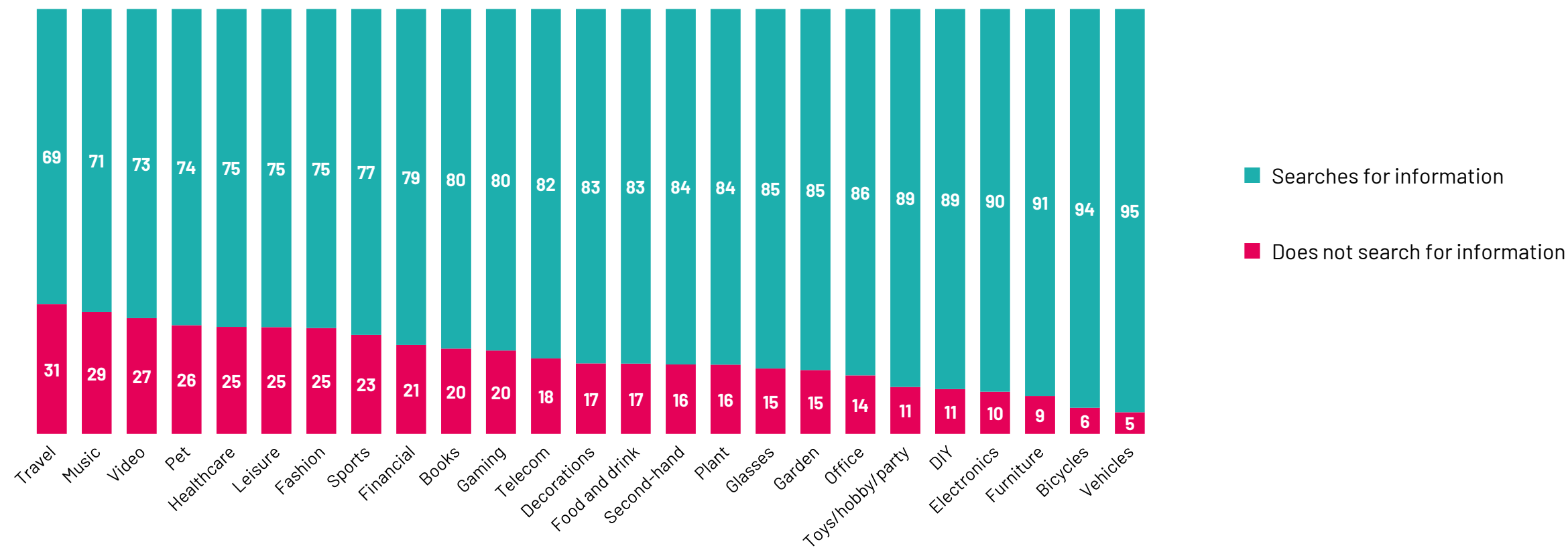
- 🔍 The **use of AI tools** for information searches has slightly increased (from 6% in 2025 to 8% in 2026).
- 🔍 Shoppers are **more** likely to **search for information** on **warranty** and **repair** options (up from 7% to 12%).

WHERE DO SHOPPERS
SEARCH FOR
INFORMATION?

AND WHAT DO THEY LOOK
FOR?

TO WHAT EXTENT DO ONLINE SHOPPERS SEARCH FOR INFORMATION? - PER PRODUCT CATEGORY

The large majority searches for information prior to purchase, no matter the category, and remains stable versus 2025. The search for information is highest for furniture, bicycles and vehicles.

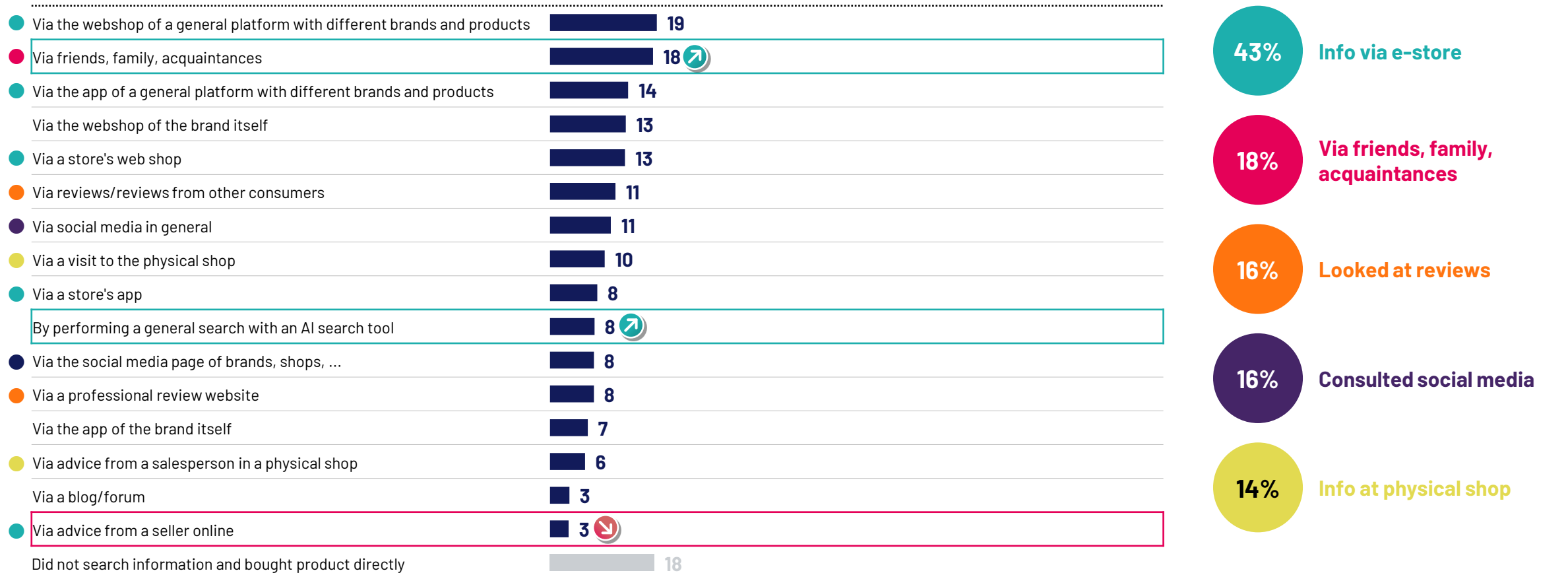


Base: Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months)(n=80 per category on average)
Question: Q5. How did you gather information for this purchase?



HOW DO ONLINE SHOPPERS SEARCH FOR INFORMATION?

About 8 in 10 shoppers searches for information before buying products online. The e-store itself is still the main source of information. Friends, family and acquaintances are increasingly consulted as a source of information, as well as AI tools. Though to a more limited extent.

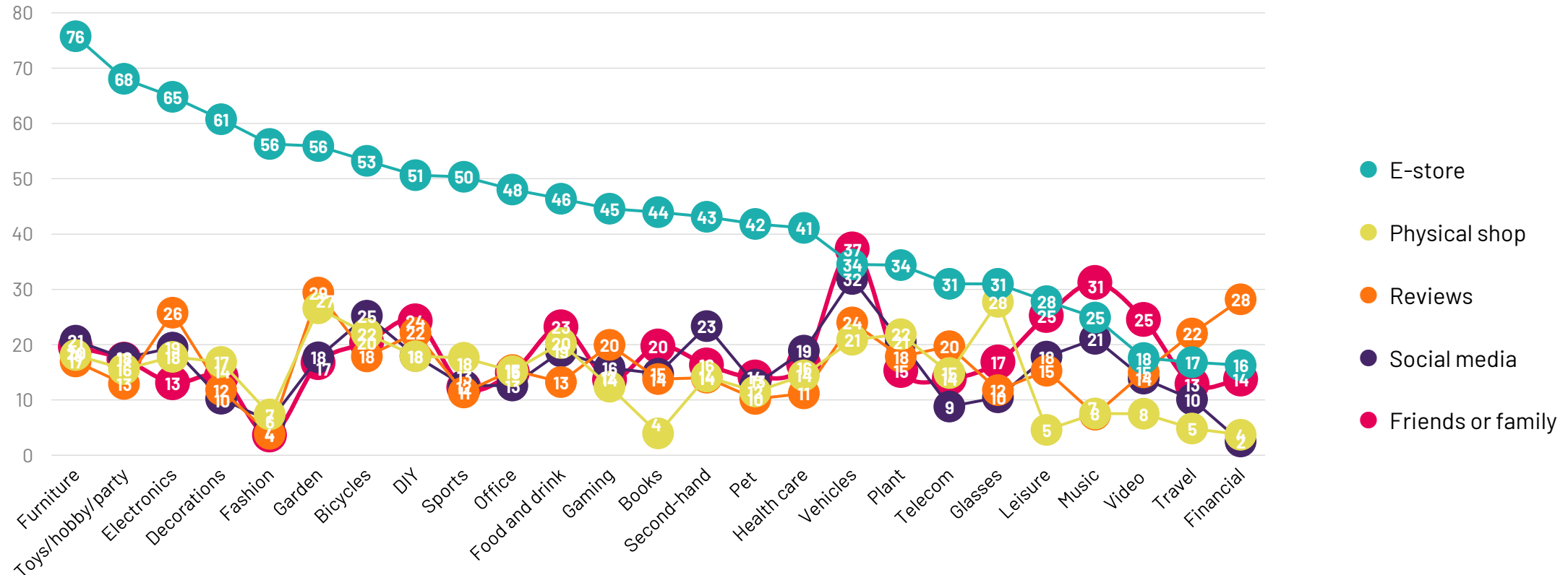


Base: Total Sample (n=2010)
Question: Q5. How did you gather information for this purchase?
Note: Question was asked with regards to specific product category



HOW DO ONLINE SHOPPERS SEARCH FOR INFORMATION? - PER PRODUCT CATEGORY

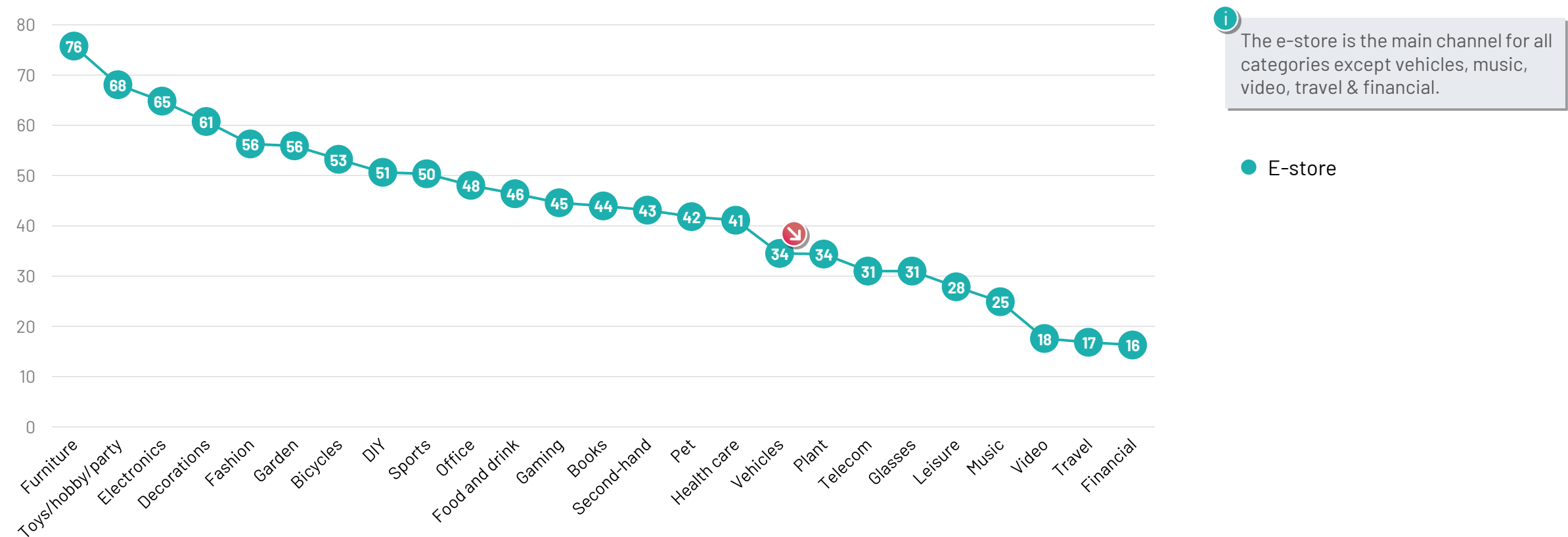
Information is generally gathered more through e-stores. However, friends or family are consulted to a higher extent for vehicles, music or video. Reviews are consulted more than e-stores for travel and financial purchases.



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 CATEGORY – FOCUS ON E-STORE

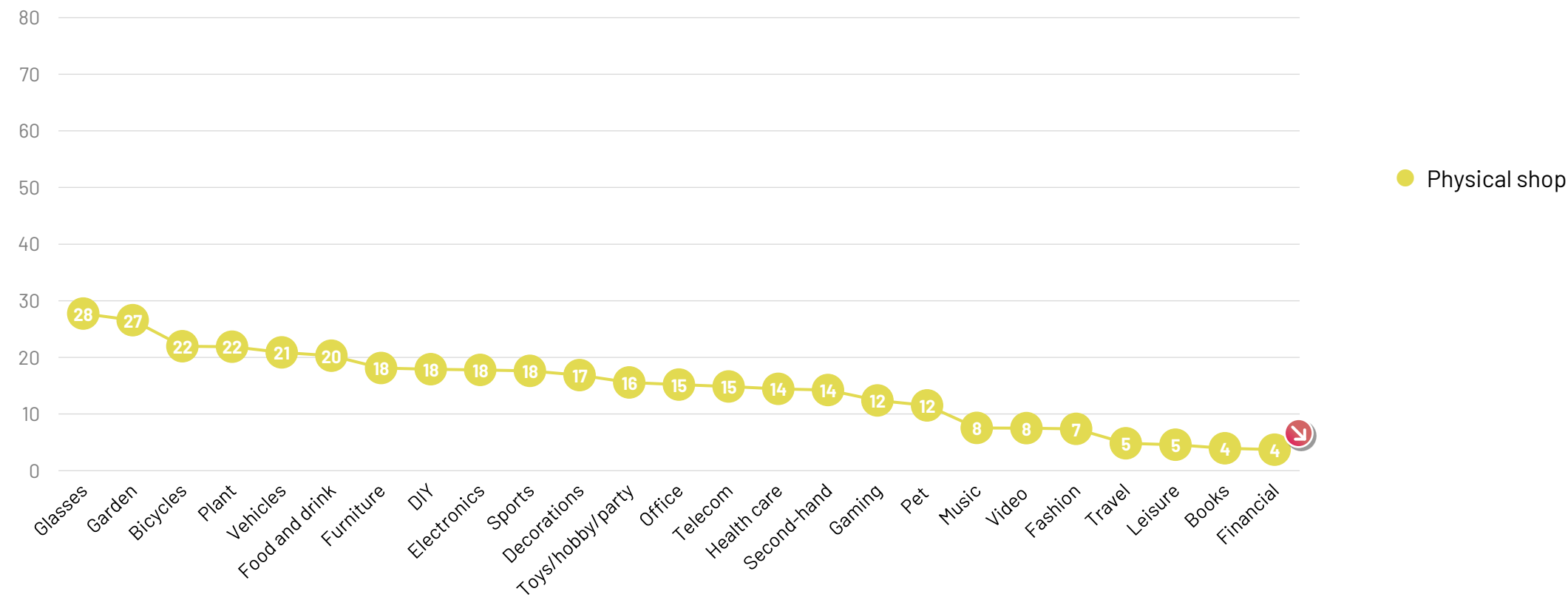
The e-store remains a highly relevant source of information for many product categories. Though it's importance for information on vehicles has declined compared to the previous wave.



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 CATEGORY - FOCUS ON PHYSICAL SHOP

About 1/4 search for information on glasses, the garden, bicycles and plants in physical shops.

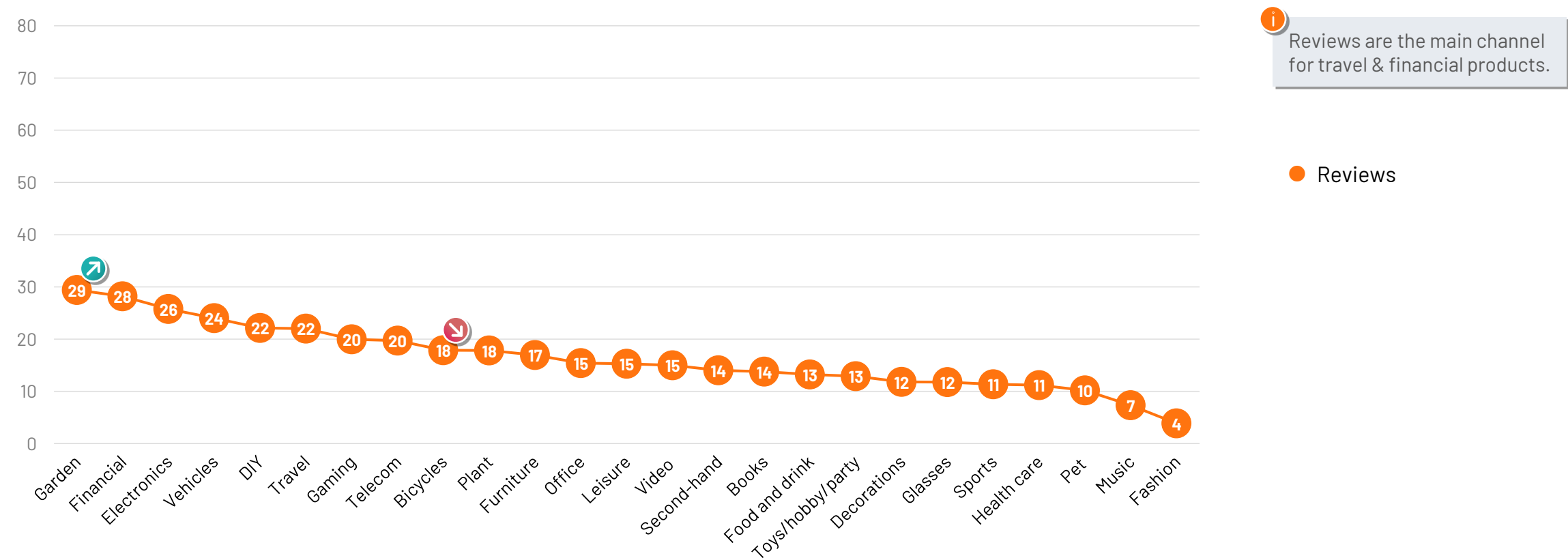


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HOW DO ONLINE SHOPPERS SEARCH FOR INFORMATION? - PER PRODUCT CATEGORY - FOCUS ON REVIEWS

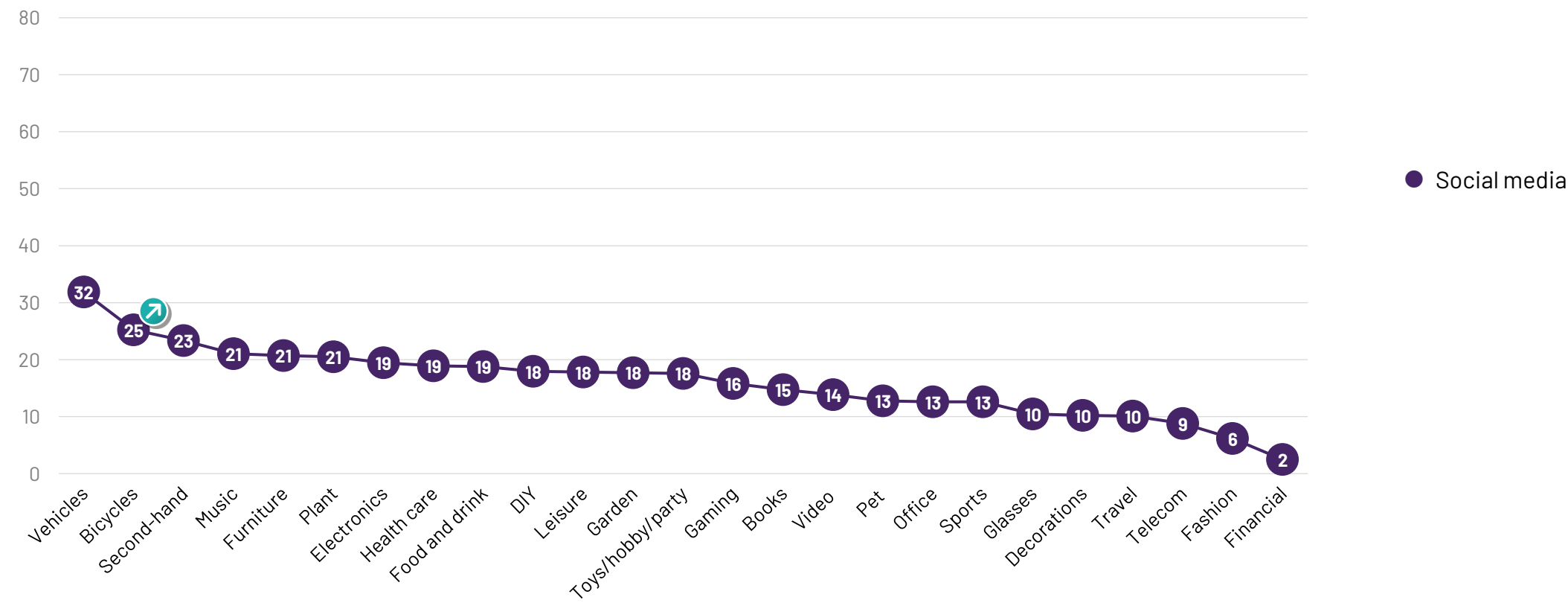
About 3/10 rely on reviews for information on the garden & financial products. They've become a more relevant channel for information on the former category as well. However, their importance for information on bicycles has declined compared to the previous wave.



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 CATEGORY - FOCUS ON SOCIAL MEDIA

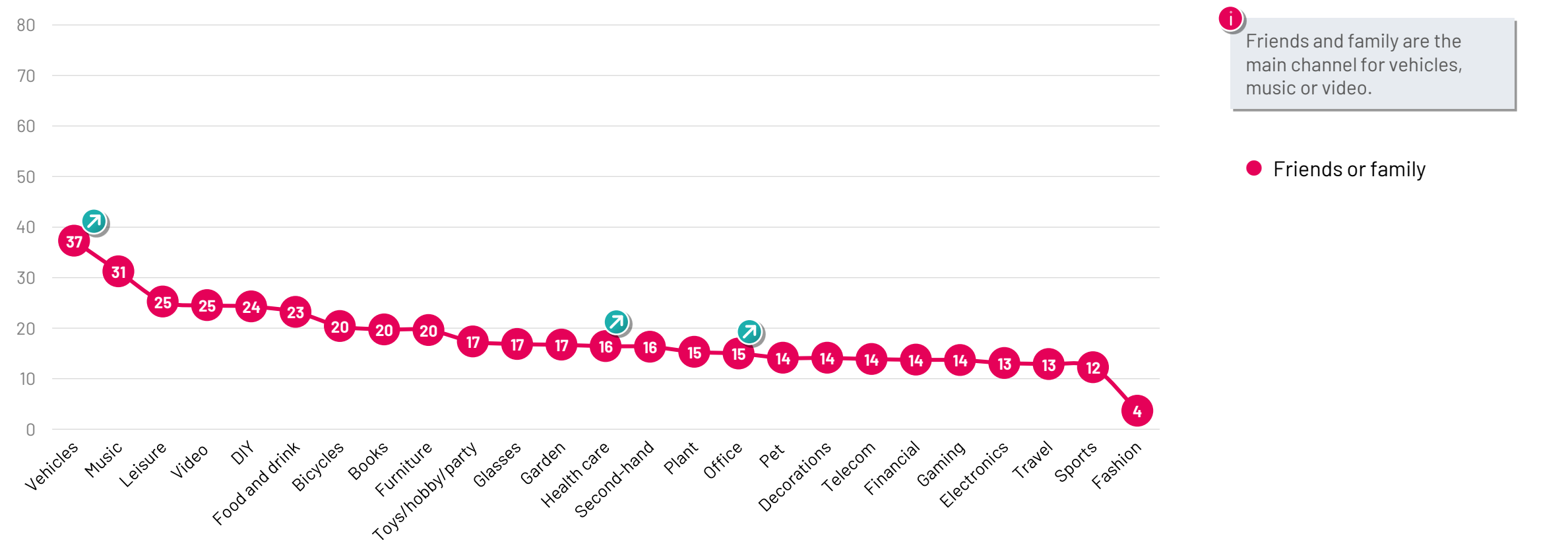
1/3 looks to social media for information about vehicles. The channel has become more relevant for information on bicycles.



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 CATEGORY - FOCUS ON FRIENDS OR FAMILY

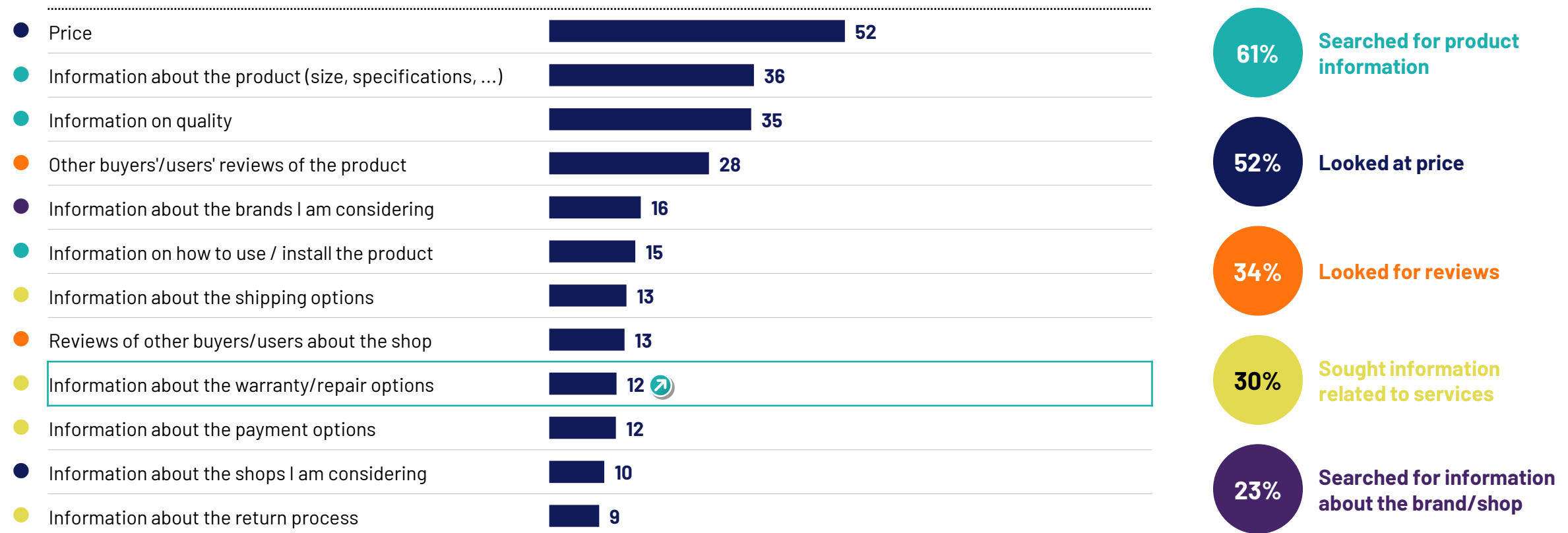
Friends and family have become a more consulted source for information about vehicles, health care and office items.



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?

More than half of shoppers have searched for product & price information. Information related to warranty or repair options is increasingly consulted. About 1/3 has looked for reviews, mostly about the product itself.

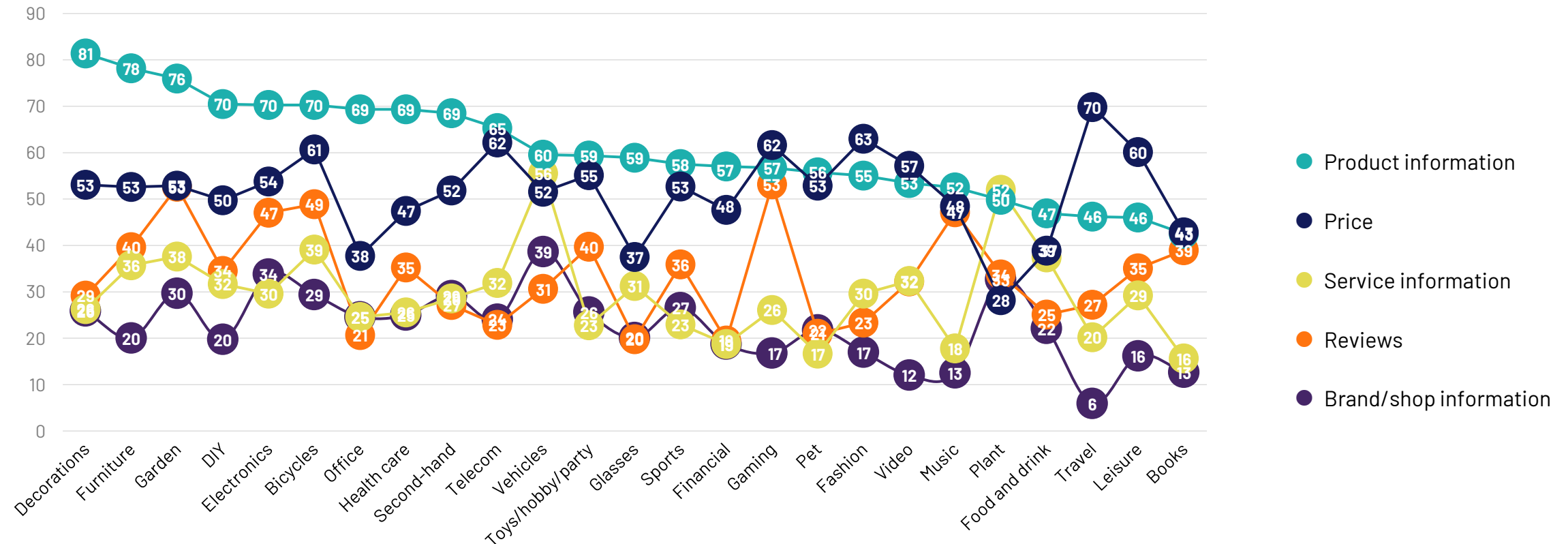


Base: Total Sample (n=2010)
Question: Q6. What kind of information were you looking for?
Note: Question was asked with regards to specific product category



WHAT TYPE OF INFORMATION DO ONLINE SHOPPERS CONSULT? - PER PRODUCT CATEGORY

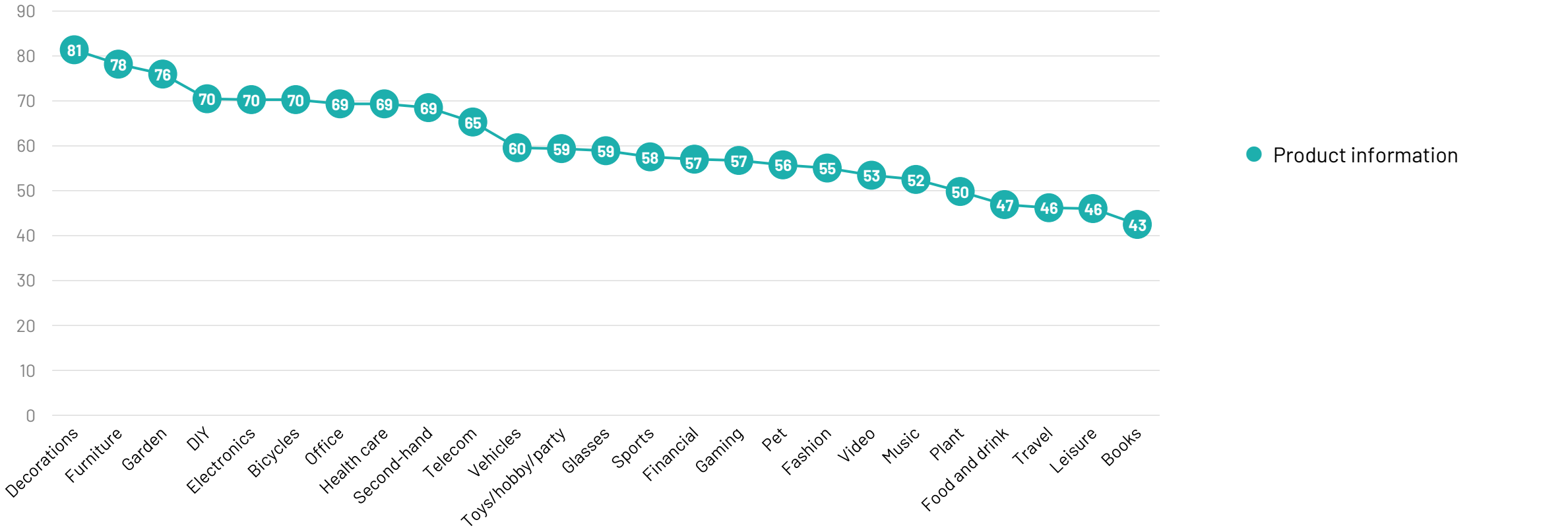
Product information is generally more important across categories, though price is equally relevant for some categories and even exceeds product information for gaming, fashion, video and to an even higher extent for travel & leisure. Note that service and product info are equally consulted for food & drinks.



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? - PER PRODUCT CATEGORY - FOCUS ON PRODUCT INFO

At least 4/10 shoppers consult product information across categories.

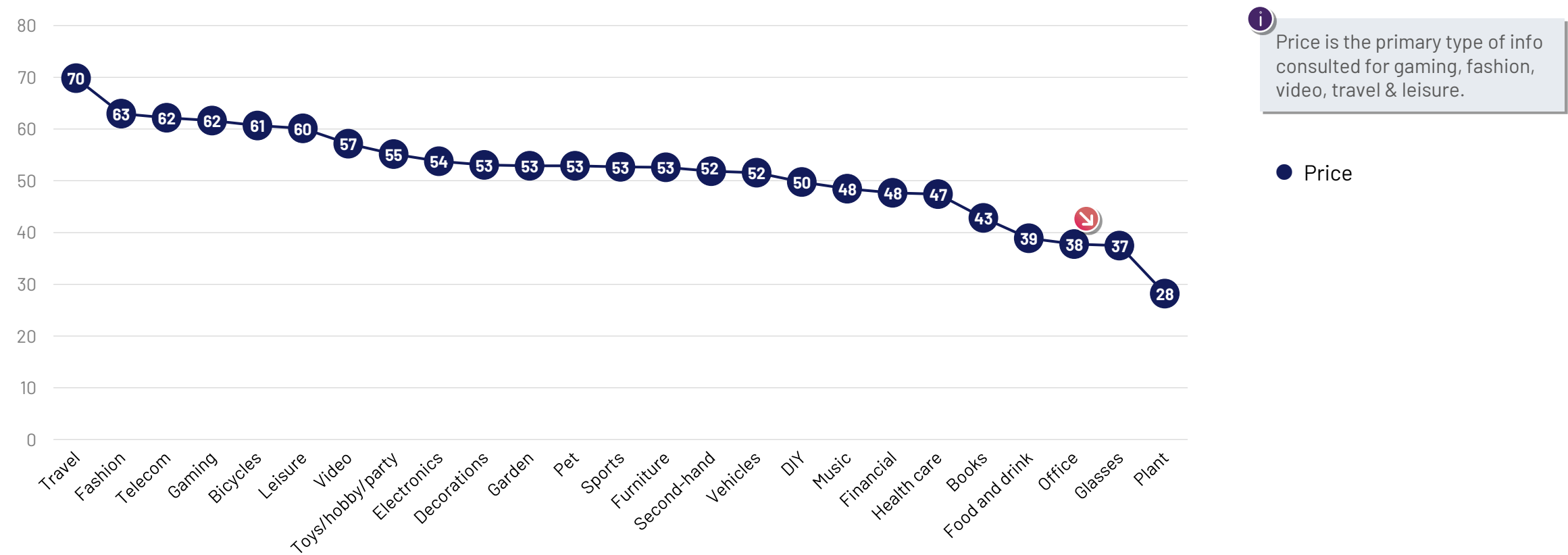


Base: Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months)(n=80 per category on average)
Question: Q6. What kind of information were you looking for?



WHAT TYPE OF INFORMATION DO ONLINE SHOPPERS CONSULT? - PER PRODUCT CATEGORY - FOCUS ON PRICE

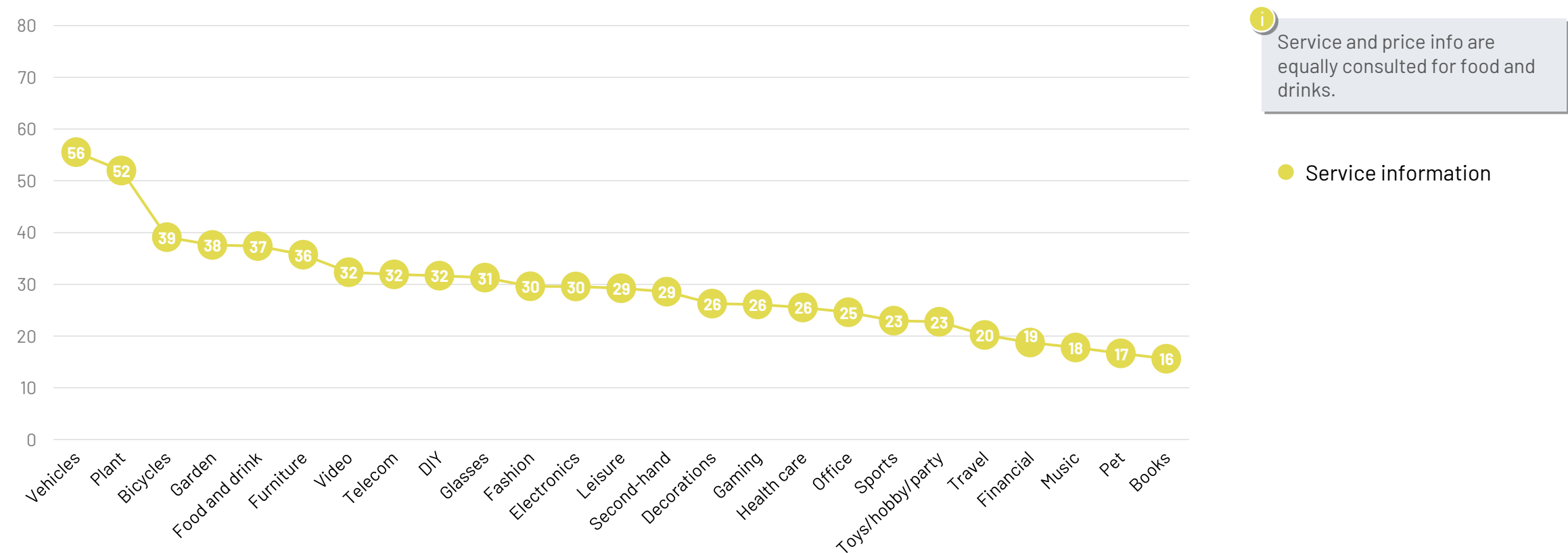
Price information is consulted by less shoppers for office items.



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? - PER PRODUCT CATEGORY – FOCUS ON SERVICE INFO

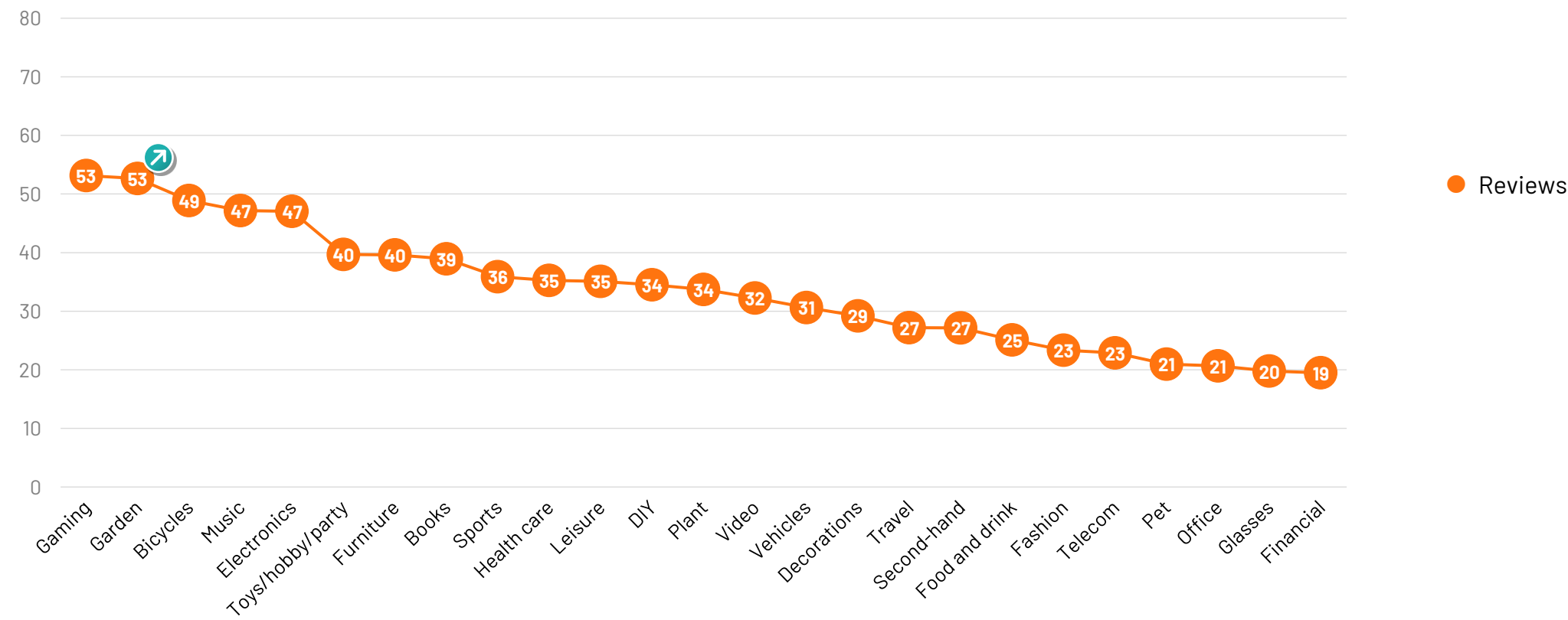
More than half of shoppers for vehicles or plants have looked for service information.



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? - PER PRODUCT CATEGORY – FOCUS ON REVIEWS

Reviews are consulted by more shoppers for garden articles.

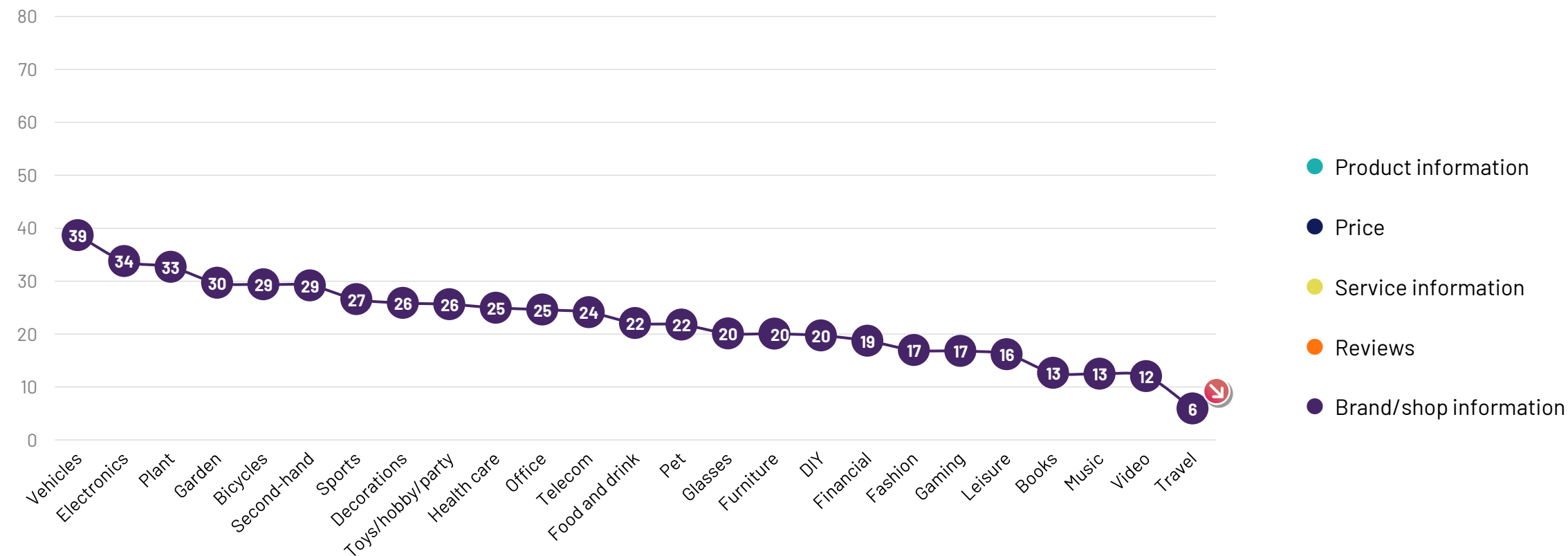


Base: Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months)(n=80 per category on average)
Question: Q6. What kind of information were you looking for?



WHAT TYPE OF INFORMATION DO ONLINE SHOPPERS CONSULT? - PER PRODUCT CATEGORY - FOCUS ON BRAND/SHOP INFO

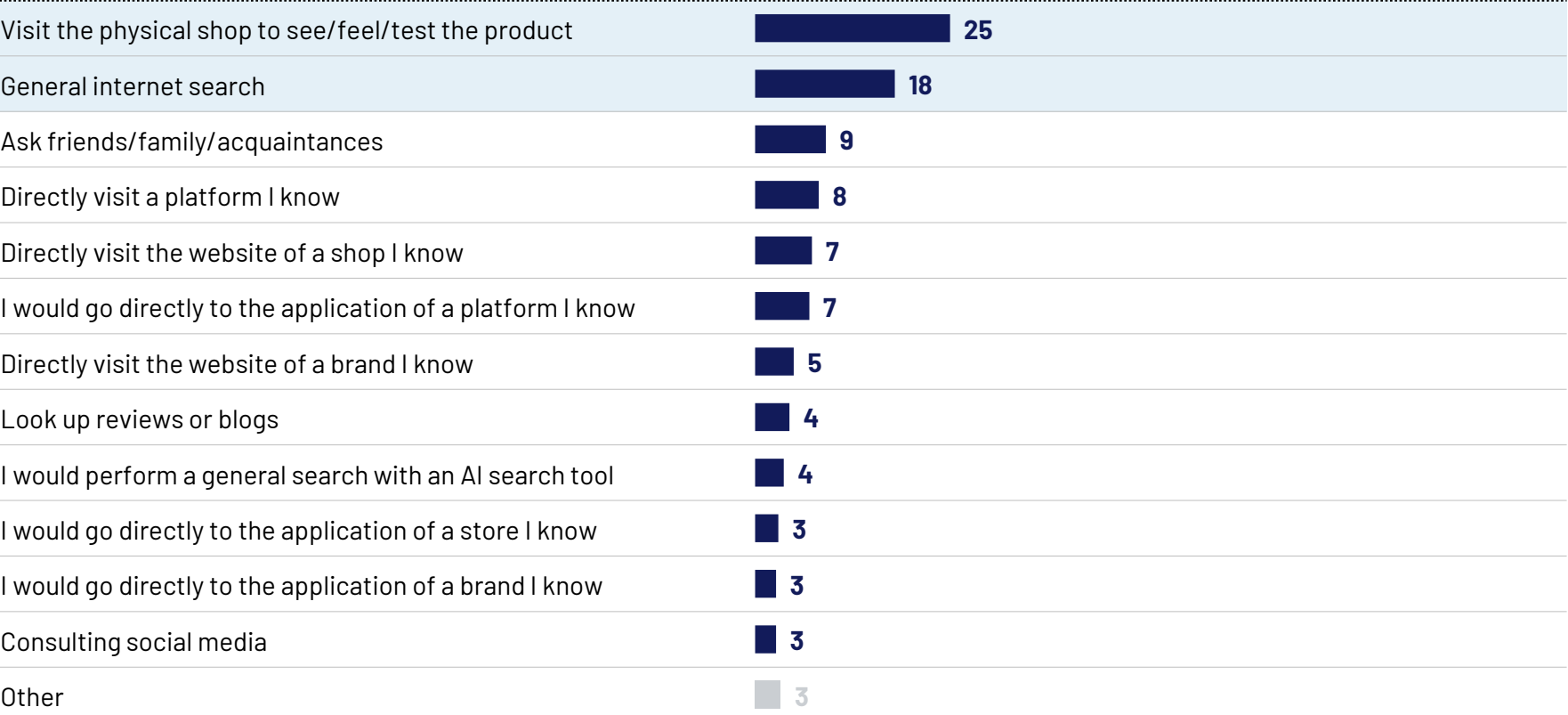
Brand or shop information is generally consulted by fewer shoppers and to a lesser extent than before for travel.



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?

UNFAMILIAR PRODUCT ZOOM: WHAT IS THE FIRST STEP WHEN BUYING A LESS FREQUENTLY BOUGHT PRODUCT?

When buying a less familiar product, visiting the physical shop to see the product and doing a general internet search first remain the most common initial steps to take.



Base: Total Sample, excl. those that that bought all categories in the past 12 months (n=5262) (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



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INNOVATIONS



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WHAT'S NEW?

 **Loyalty** seems to **decrease**:

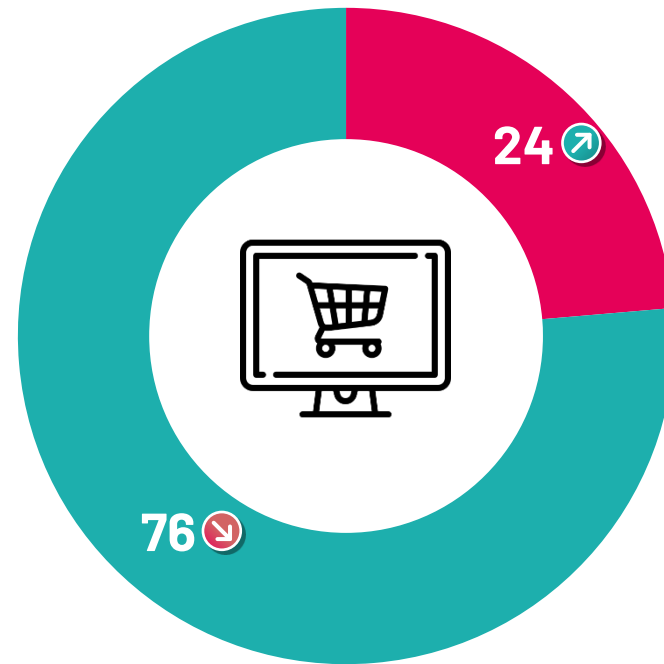
- **More purchases** on a **webshop they had not visited before** (from 82 to 76%)
- **Fewer** people having an **account** on the webshop (from 80 to 77%)

 Increased buying through **social media** (from 3 to 5% – back to the same level as 2024)

 Increased importance of **reviews** on an **independent website** (from 18 to 21%), while **reviews** from **family and friends** is now **less important** (from 22 to 19%)

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

The large majority of shoppers are still returning to familiar webshops, though to a lesser extent compared to the previous wave.

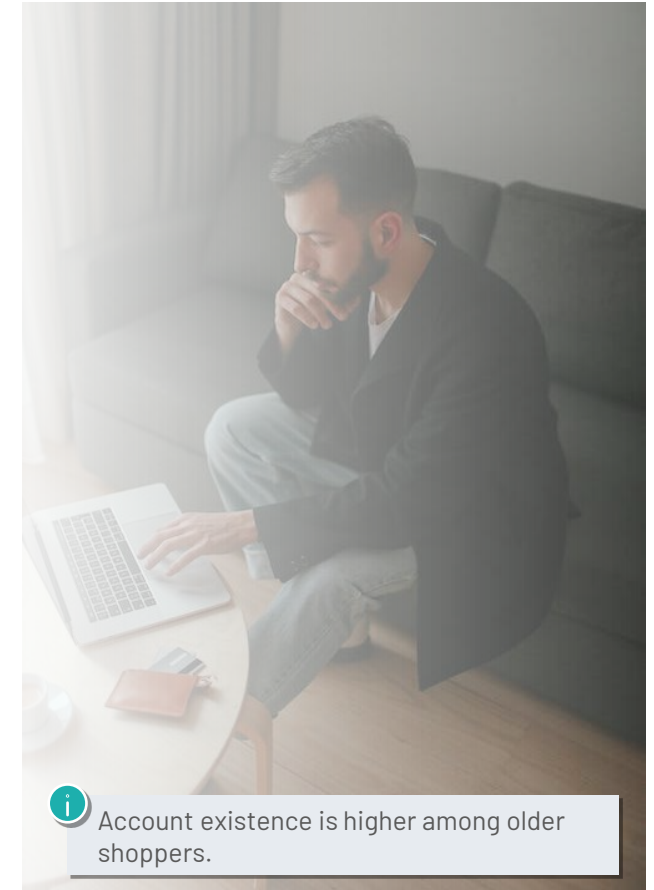
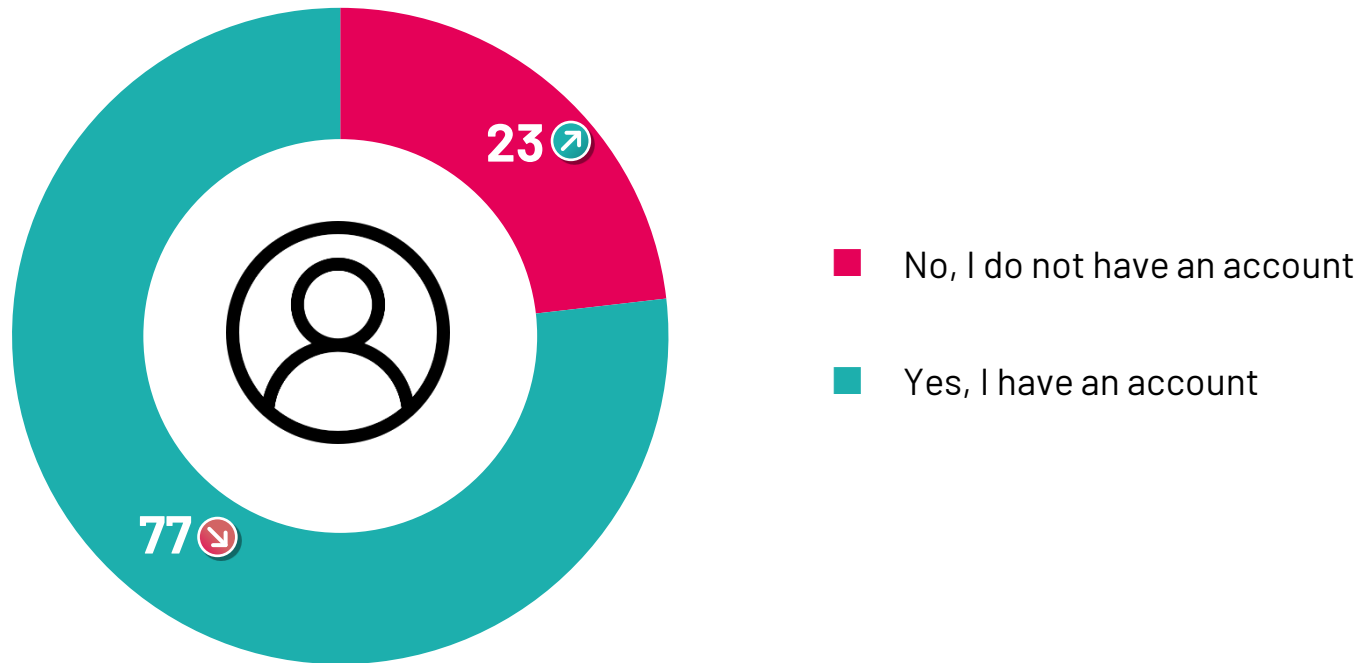


- No, I had not purchased from this webshop before
- Yes, I had purchased from this webshop before

Base: Total Sample (n=2010)
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.

LOYALTY ZOOM: HOW MANY ONLINE SHOPPERS HAVE A WEBSHOP ACCOUNT?

Most online shoppers still have an account for the webshop they made their purchase at, though registration to a webshop has decreased compared to the previous wave.



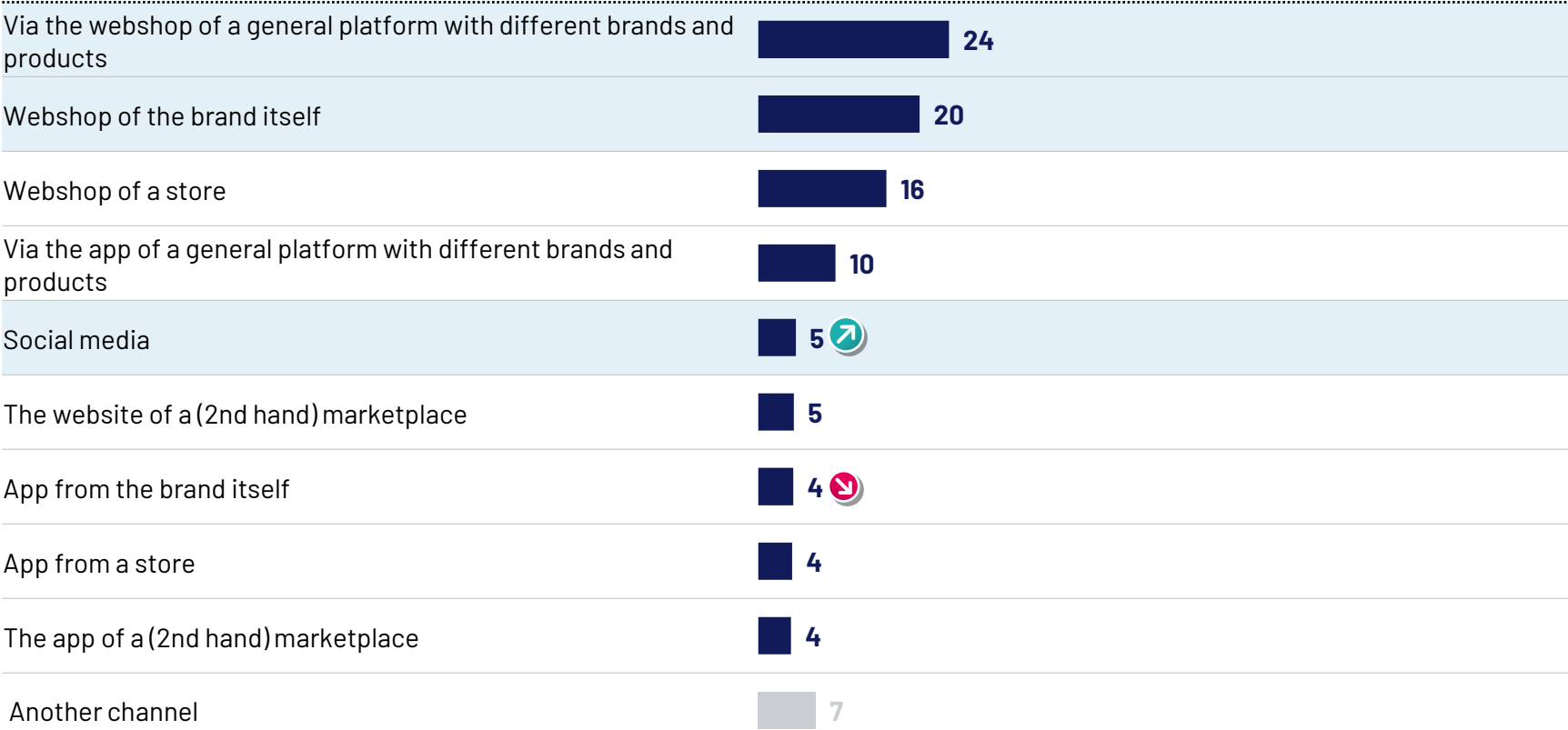
Base: Total Sample (n=2010)

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.

WHERE DO ONLINE SHOPPERS BUY?

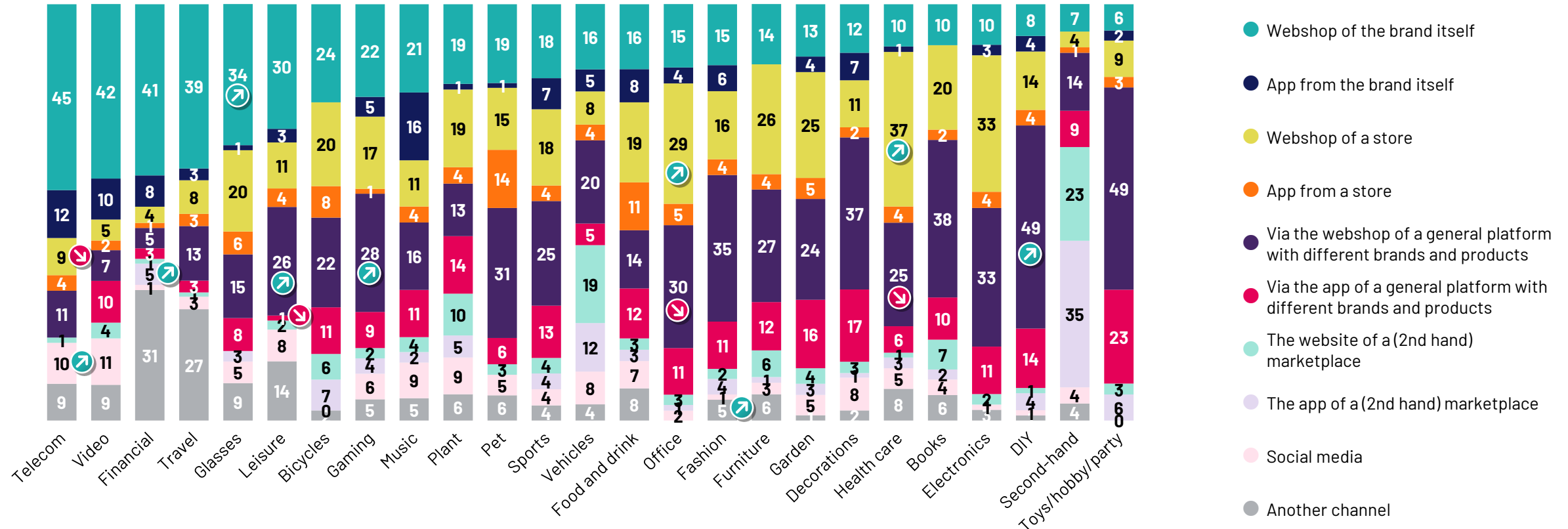
Platforms, such as Bol.com or Amazon remain the most popular online purchase channel, with 1 in 4 having bought from a platform for their last purchase. Usage of social media, though still limited, has increased. Apps from the brand itself have become a less popular purchase channel.



Base: Total Sample (n=2010)
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? – PER PRODUCT CATEGORY

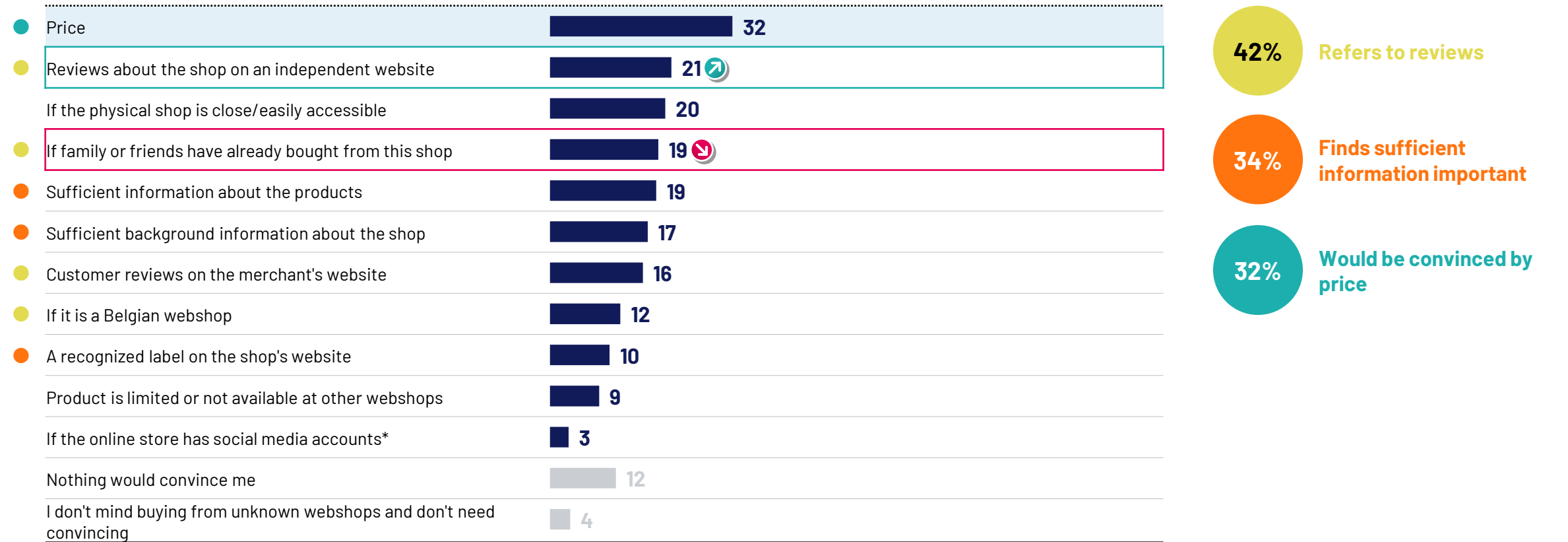
Telecom products, video, financial, travel,... are most often bought via the webshop of the brand itself, while other categories, especially pet, fashion, decorations, books, DIY & toys are bought predominantly via webshops of a general platform. Store webshops are especially popular for office, health care & electronics related items.



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?

UNFAMILIAR WEBSHOP ZOOM: WHAT CONVINCES ONLINE SHOPPERS TO BUY FROM AN UNKNOWN WEBSHOP?

Price remains the top factor in convincing shoppers to buy from an unfamiliar webshop. Reviews on independent website have also become a more significant factor compared to before. While the importance of family or friends making a prior purchase has decreased. Only 1/10 indicate nothing would convince them.



Base: Total Sample, excl. those that that bought all categories in the past 12 months (n=1835)
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.

i *New added item in wave 2026



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WHICH PAYMENT AND SHIPPING HABITS DO PEOPLE HAVE?

WHAT'S NEW?



Payment: Bancontact's dominance is growing. The preference for and usage of Bancontact is increasing while the preference and usage of PayPal is decreasing. Also preference for and usage of **Klarna**, **Wero** and **Apple Pay** are **increasing**.



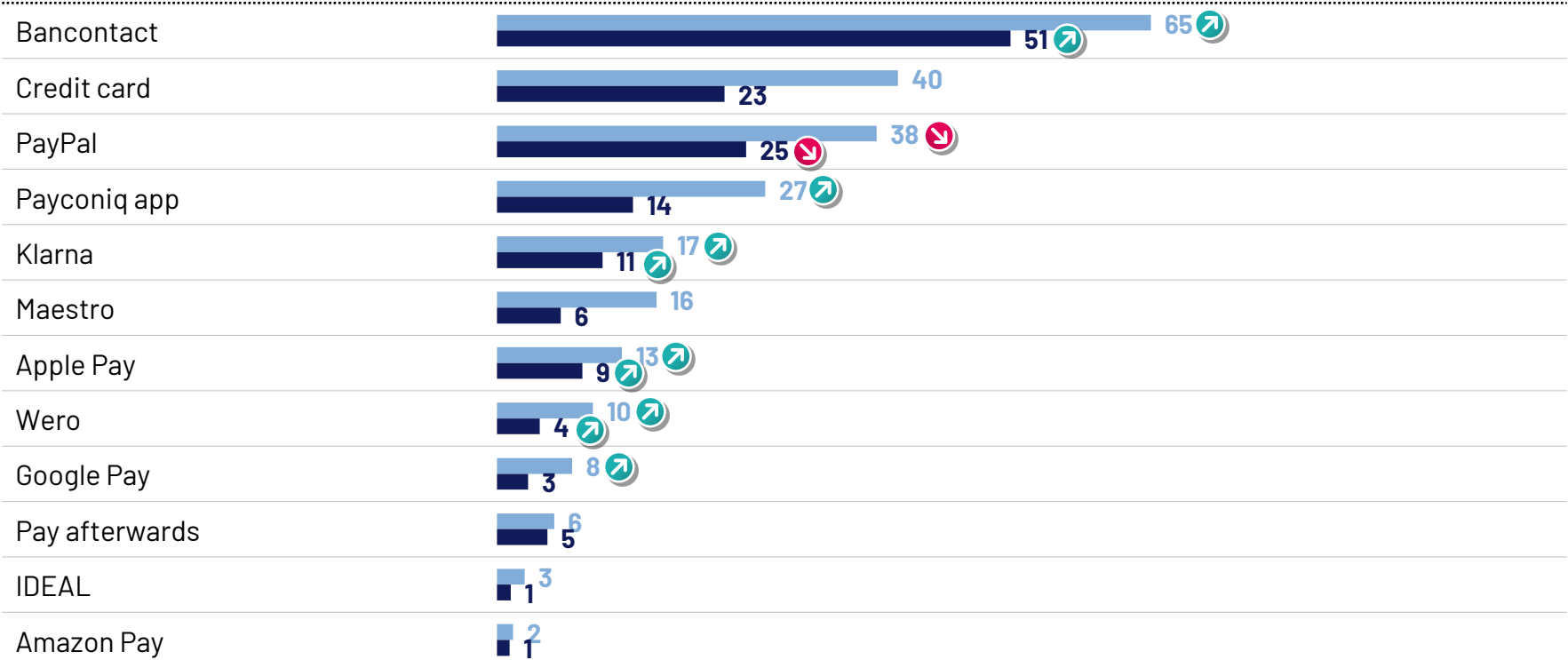
Shipping: Home delivery is losing ground (from 61% to 57%), while delivery to a **locker** or **automated point** is **increasing** (from 2% to 4%).



New section on post-order communication reveals that **lack of clarity** about the **delivery date** is the **biggest frustration** and that nearly **4 out of 5** shoppers **find** it **appealing** to **have all order information centralized** within the brand's ecosystem.

WHAT PAYMENT METHODS ARE USED AND PREFERRED?

Bancontact is the most used and preferred method for paying online, even increasing throughout the years. Following, credit card and PayPal are most used. Usage of several options like Payconiq, Klarna, Apple Pay, Wero and Google Pay increased, suggesting more online shoppers use a variety of payment methods.



Used
Preferred

Google Pay, Amazon Pay and Apple Pay are more popular among those **younger than 34yo**. **Payconiq** is way more popular among **35-44yo**.

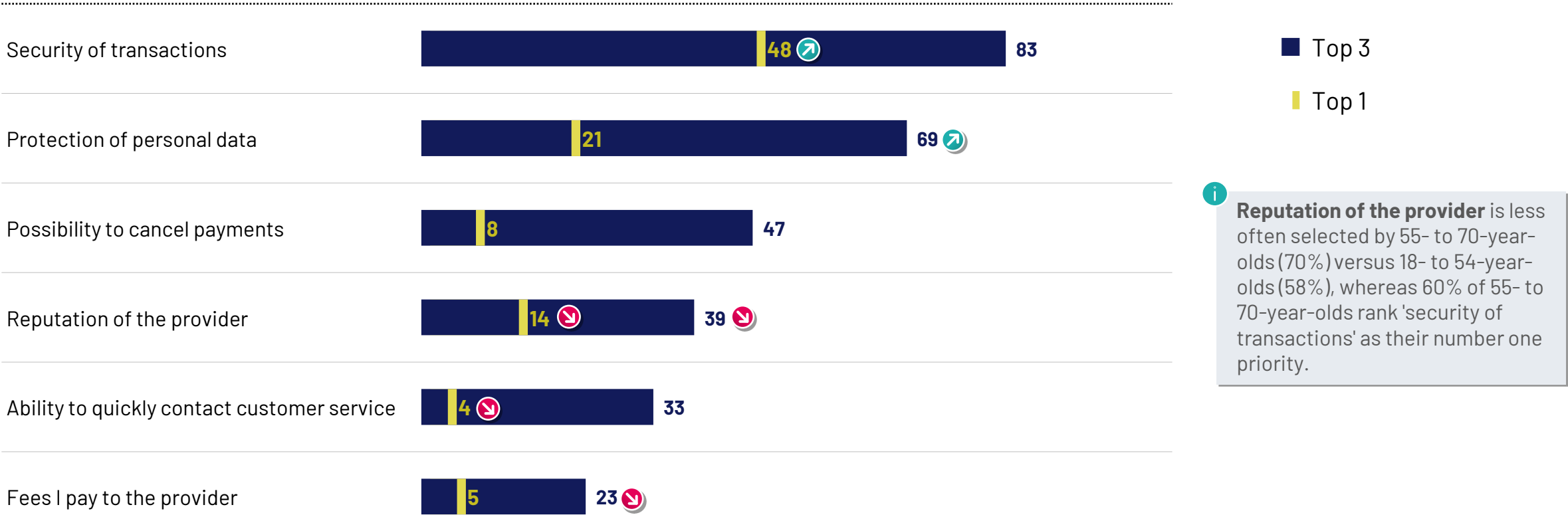
32% of shoppers use one type only, a decrease from the 40% previous wave. When asked about preference, 2 in 3 chooses one method only (also a decrease compared to 7 in 10 in previous wave).

Base: Total Sample (n=2010)
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?



WHAT ASPECTS OF A PAYMENT METHODS ARE MOST IMPORTANT FOR A SHOPPER?

Security of transactions remains a top priority for shoppers when it comes to payment methods, as it's identified as a crucial factor to a higher extent than before. Protection of personal data is also highly valued, and mentioned in the top three of more than 2 in 3 shoppers and increasing in importance. Fees & reputation related to the provider have become less important.

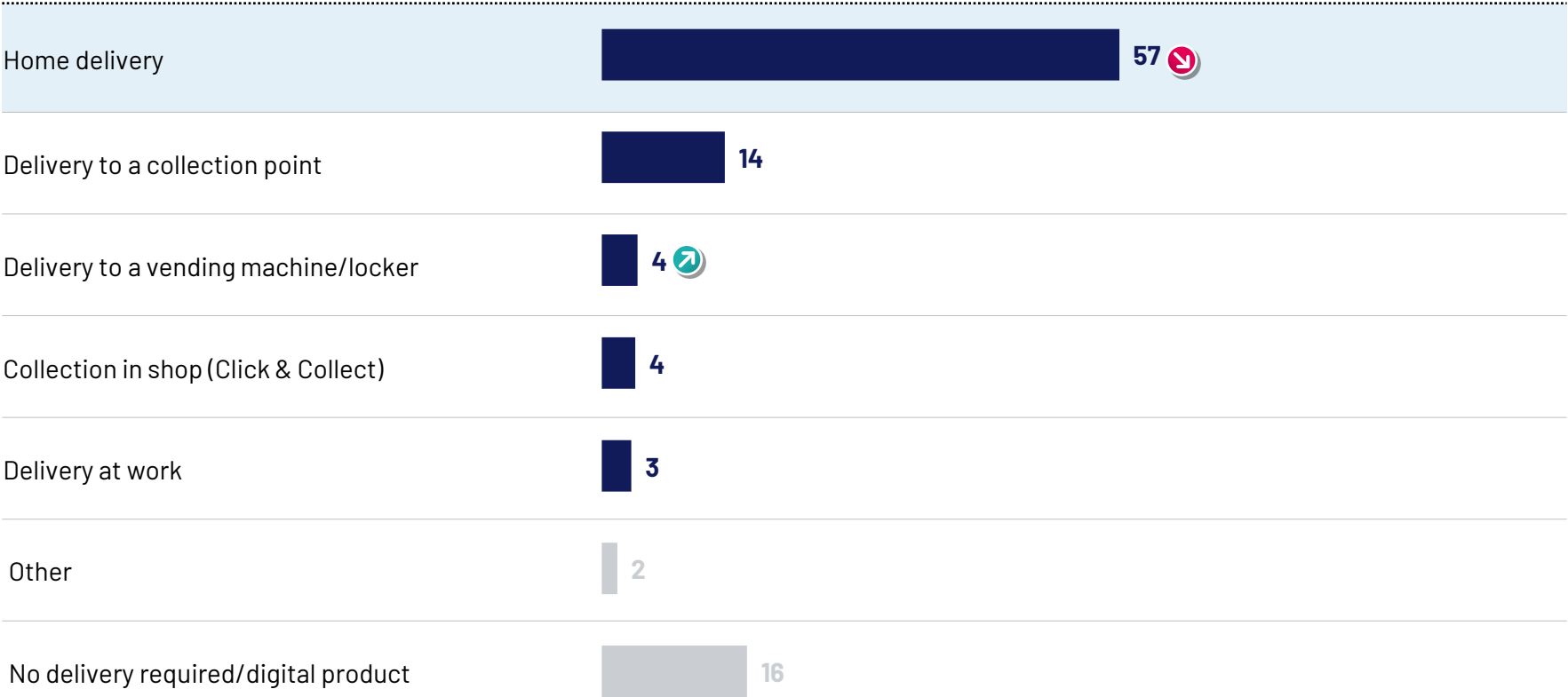


Base: Total sample (n=2010)
Question: Q24b. Which of the following aspects of a payment method are most important to you?



WHAT SHIPPING METHODS ARE USED?

Delivery at home remains the most popular shipping method for online purchases but has lost some popularity compared to the previous wave. Delivery to a locker in contrast, has increased in usage, though still used by a very small minority.



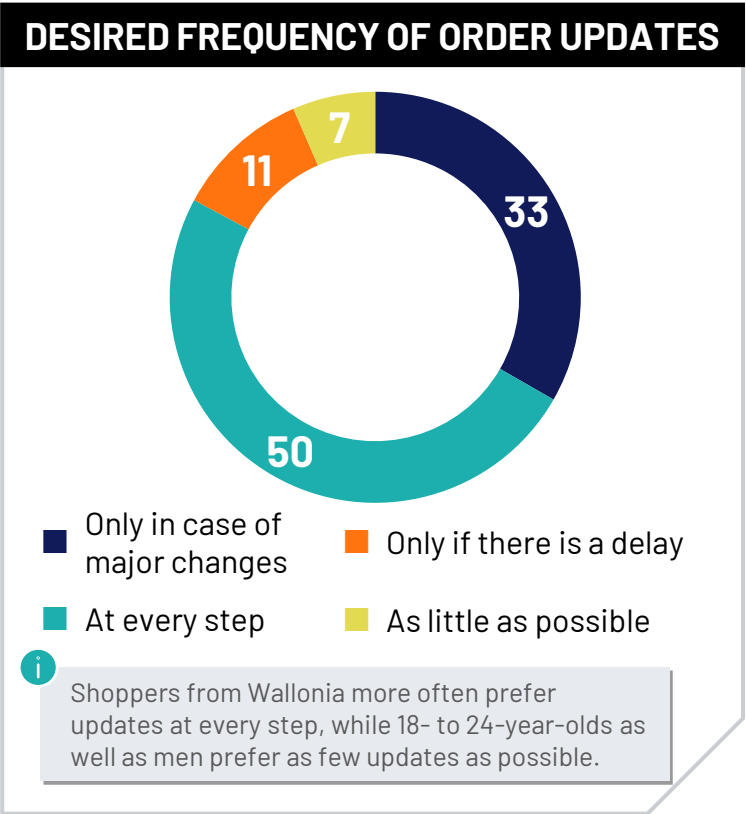
i 45- to 70-year-olds more often requires no delivery. 'Delivery at work', on the other hand, is the more often used among the 18- to 24-year-olds.

Base: Total Sample (n=2010)
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.



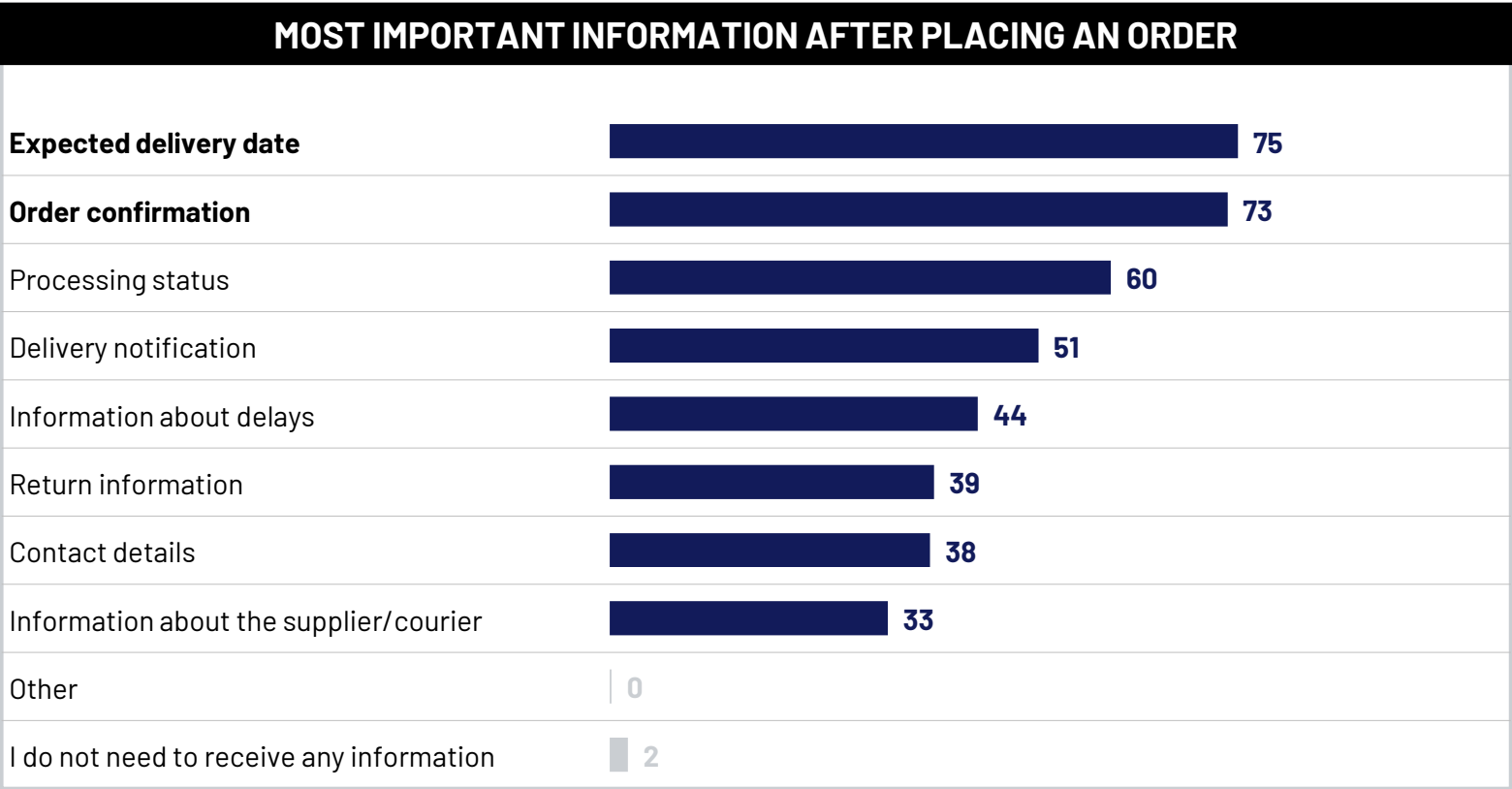
HOW OFTEN DO SHOPPERS WANT UPDATES, AND WHAT KIND OF INFORMATION DO THEY WANT AFTER PLACING AN ORDER?

Half of shoppers would like to receive updates about their order at every step. $\frac{3}{4}$ expects to get information on an expected delivery date and confirmation after placing an online order.



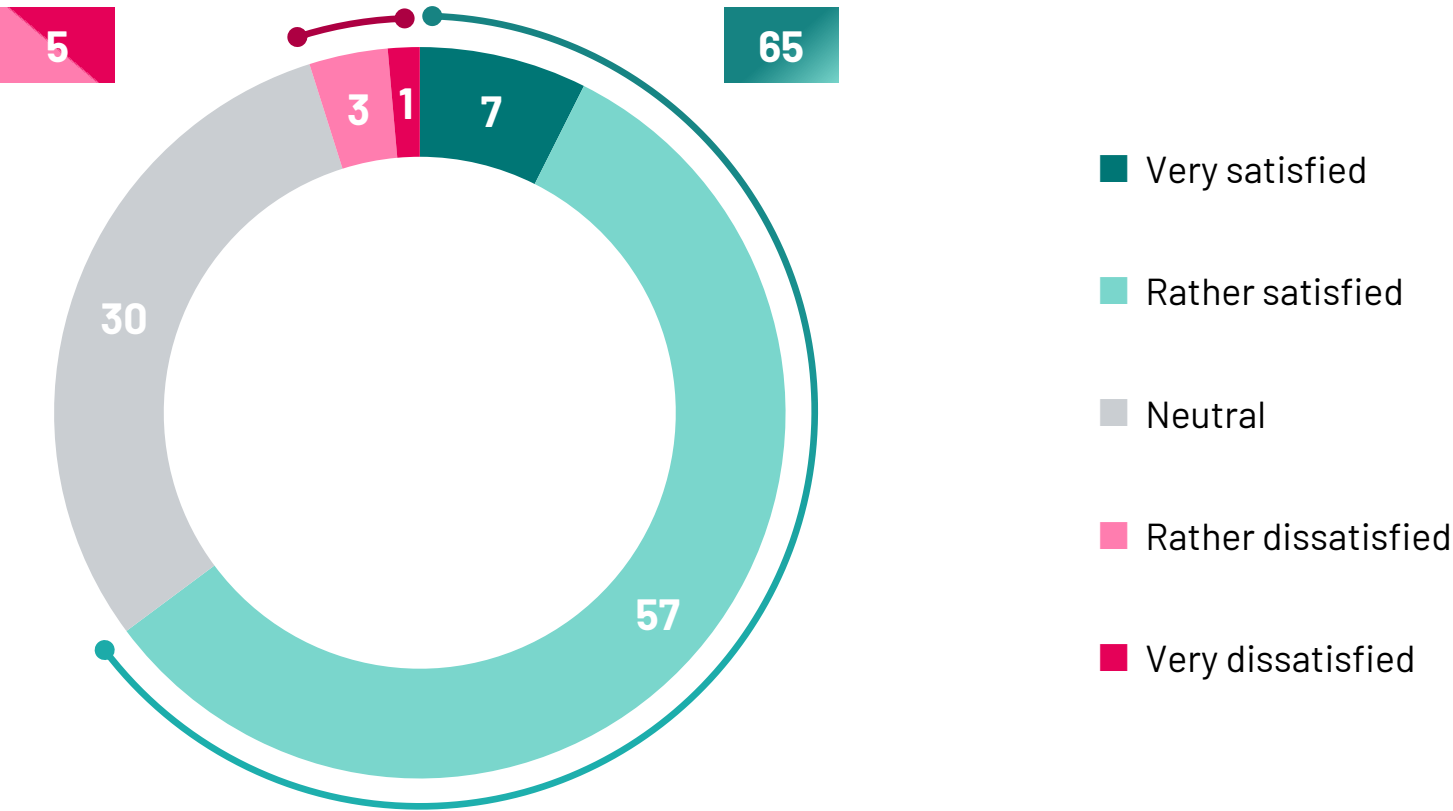
i *New added questions in wave 2026

Base: Total sample (n=2010)
Question: Q85. How often would you like to receive updates about your order? / Q82. What information would you like to receive after placing an online order?



HOW SATISFIED ARE SHOPPERS WITH THE DELIVERY INFORMATION?

Dissatisfaction with the delivery information is very limited. More than 3/5 is satisfied with the currently provided delivery information.



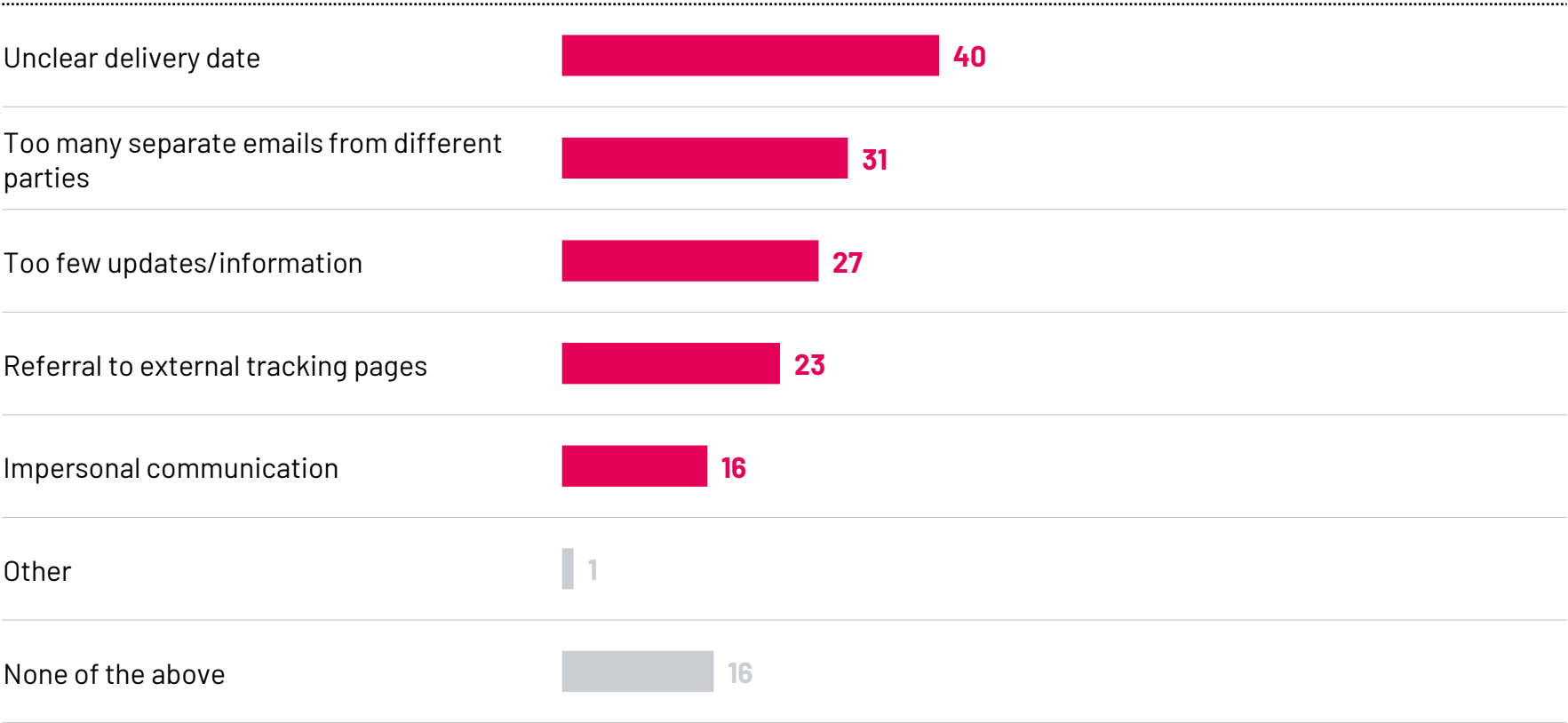
**New added question in wave 2026*

By “information about the delivery,” we did not mean the delivery itself, but the information you receive regarding the delivery of your order.

Base: Total sample (n=2010)
Question: Q83. How satisfied are you, on average, with the information you receive about the delivery of your order after making an online purchase?

WHAT FRUSTRATES SHOPPERS AFTER THEY PLACE AN ORDER?

When asked specifically, it's the unclarity of the delivery date that causes most frustration. About 1/3 also finds the amount of e-mails from different parties annoying.



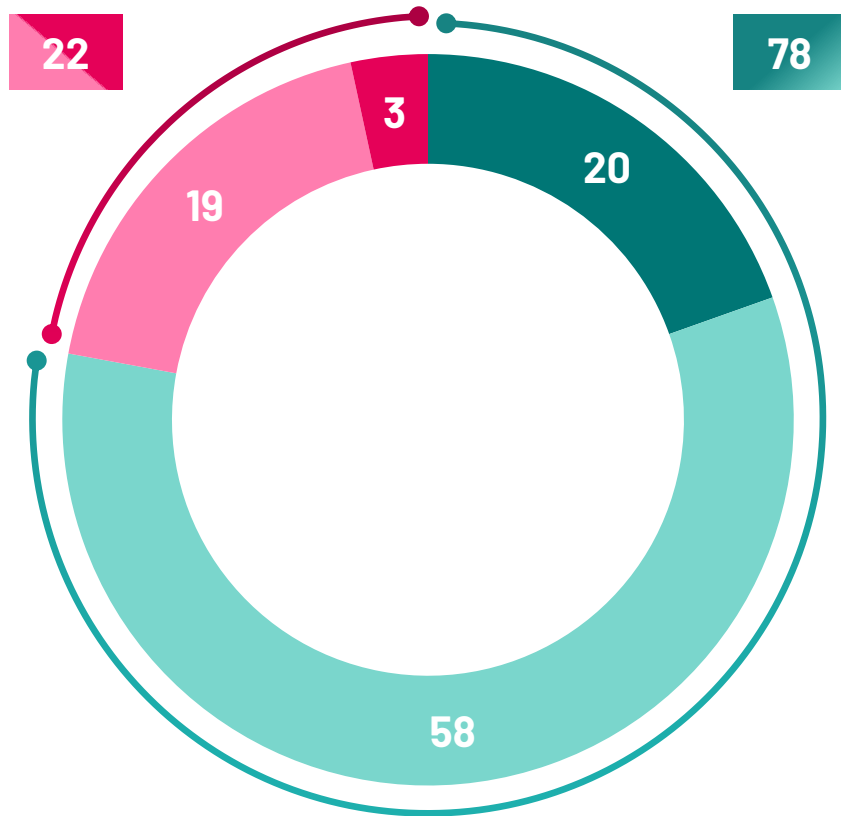
 *New added question in wave 2026

Base: Total sample (n=2010)
Question: Q84. What do you find frustrating after placing an order?



HOW APPEALING IS THE IDEA OF CENTRALIZING ALL ORDER INFORMATION?

Almost 4/5 find it appealing to have all information regarding their order centralized within the brand or online store's ecosystem.



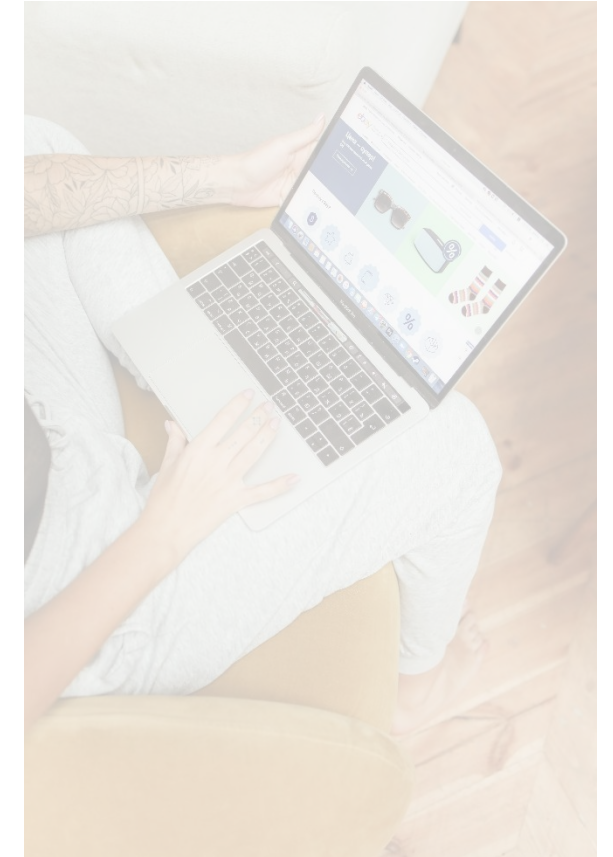
- Very appealing
- Rather appealing
- Rather unappealing
- Very unappealing

The concept is **most appealing to consumers from Flanders, parents, and 35- to 44-year-olds.**

i *New added question in wave 2026

Base: Total sample (n=2010)

Question: Q90. How appealing do you find the idea that all the information you receive – including everything related to shipping and returns – remains within the brand's or online store's ecosystem (rather than coming from a parcel delivery service like Bpost, DHL, etc.)?



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WHAT PURCHASE HURDLES DO ONLINE SHOPPERS HAVE?

WHAT'S NEW?

-  The **desire** for **more detailed product information** has significantly **increased** (from 53% in 2025 to 60% in 2026). At the same time, **interest** in **subscription options** for **repeat purchases** has **declined** (from 18% to 12%), but **free shipping** is now more often a **reason** to **join a loyalty program** (from 48 to 54)
-  While important in 2025, the **value** placed on **services** that provide **security** and **convenience after the purchase** has **grown substantially**. There was an across-the-board **increase** in the importance of:
 - Free or expedited shipping** (from 58% to 67%)
 - Hassle-free warranties** (from 41% to 47%)
 - Extensive return options** (from 32% to 38%)

WHAT WOULD SHOPPERS LIKE AS A WEBSHOP FEATURE?

About 3 in 5 shoppers request to see price & product comparison and more detailed product information, the need for the latter has also increased. Subscription options for repeat features are requested to a lesser extent compared to the previous wave.



Younger shoppers are less interested in real-time inventory, detailed product info, and price and product comparisons.

35- to 70-year-olds and consumers living in Wallonia, on the other hand, show less interest in chatbots, while consumers living in Flanders are less interested in better recommendation systems and sustainability info.

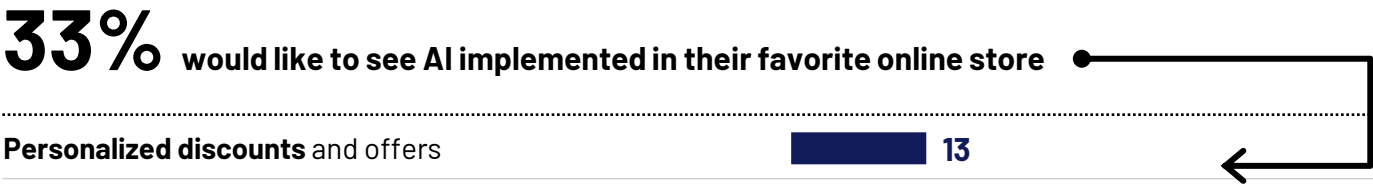
Base: Total sample (n=2010)
Question: Q50. Which of the following options would you like to see offered at web shops?

i Top 3 percentage is reported.



WHICH AI FEATURES DO SHOPPERS WANT TO SEE INTEGRATED INTO THEIR FAVORITE ONLINE STORE?

2/3 does not have the need to see AI implemented in their favorite online stores. Those who do, show fragmented interest in a broad range of features.



i *New added question in wave 2026

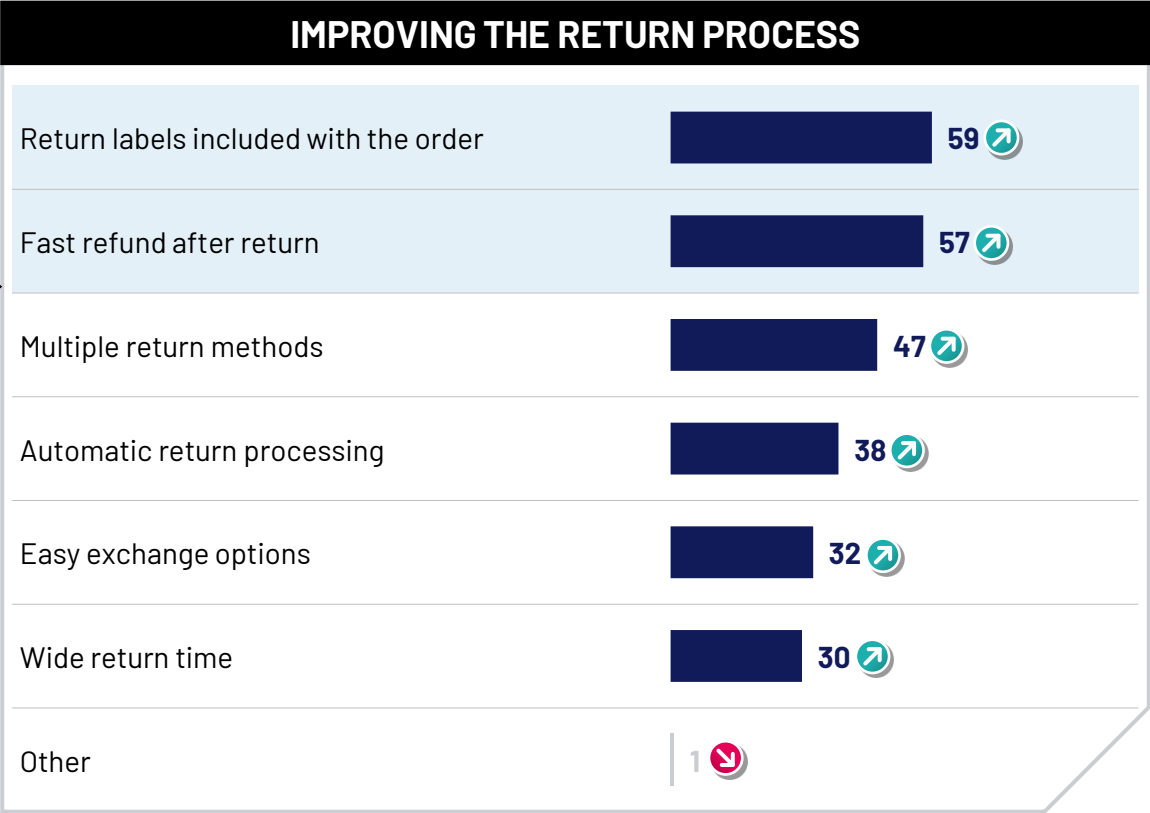
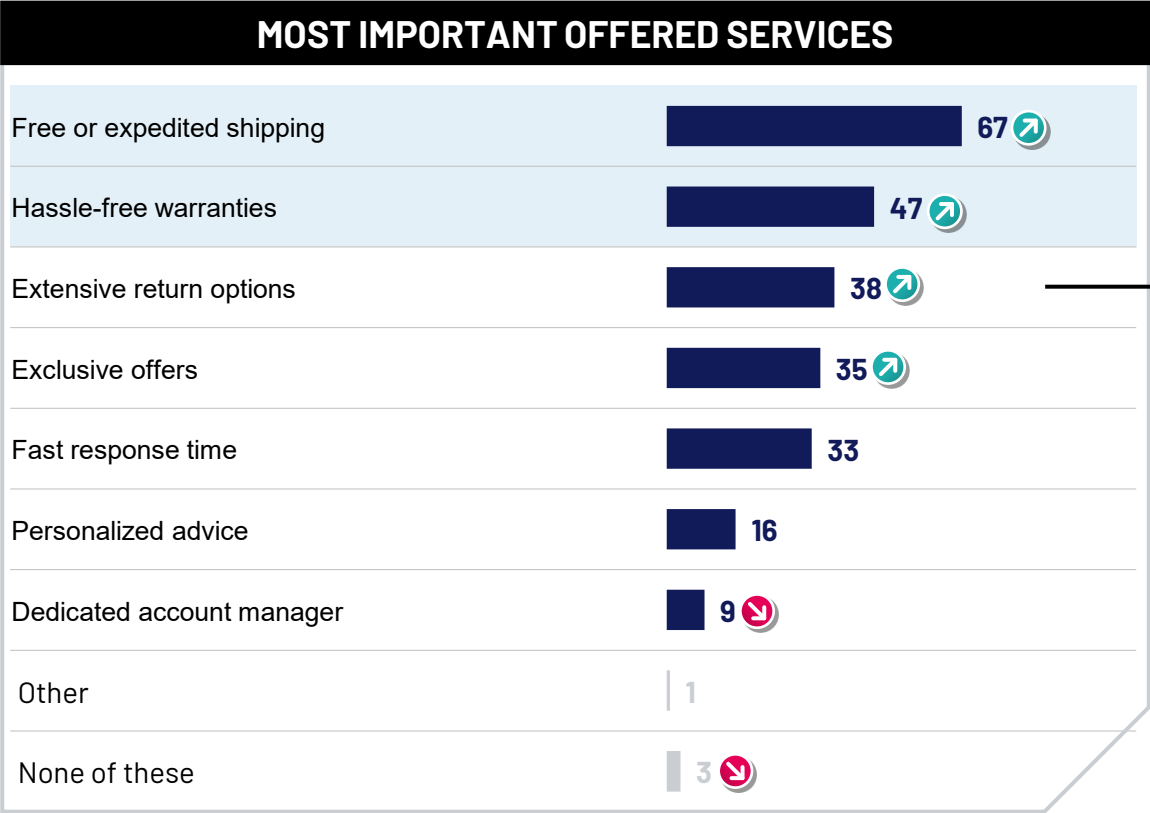
Base: Total sample (n=2010)
Question: Q89. Which of the following artificial intelligence features would you like to see implemented in your favorite online store?

i Top 3 percentage is reported.



WHAT TYPES OF SERVICES ARE MOST IMPORTANT FOR SHOPPERS WHEN SHOPPING ONLINE OR VIA APP?

Free or expedited shipping is the most essential service, mentioned by the large majority of shoppers. About half also state that hassle-free warranties are important when shopping online. The latter 2, together with extensive return options and exclusive offers are deemed more important compared to 2025 as well. There’s also a general increase in importance of simplifying the return process regardless of the option.



Base: Total sample (n=2010)
Question: Q56. Which of the following types of services are most important to you when shopping on an online store/app? | Q51. Which of the following options would make the return process easier for you?



HOW IMPORTANT ARE LOYALTY PROGRAMS FOR SHOPPERS? – PER PRODUCT CATEGORY

Loyalty programs are mostly valued for food and drink purchases, least for leisure purchases. They've become of lower importance since 2025 for purchases regarding plants, garden, bicycles, furniture & leisure.

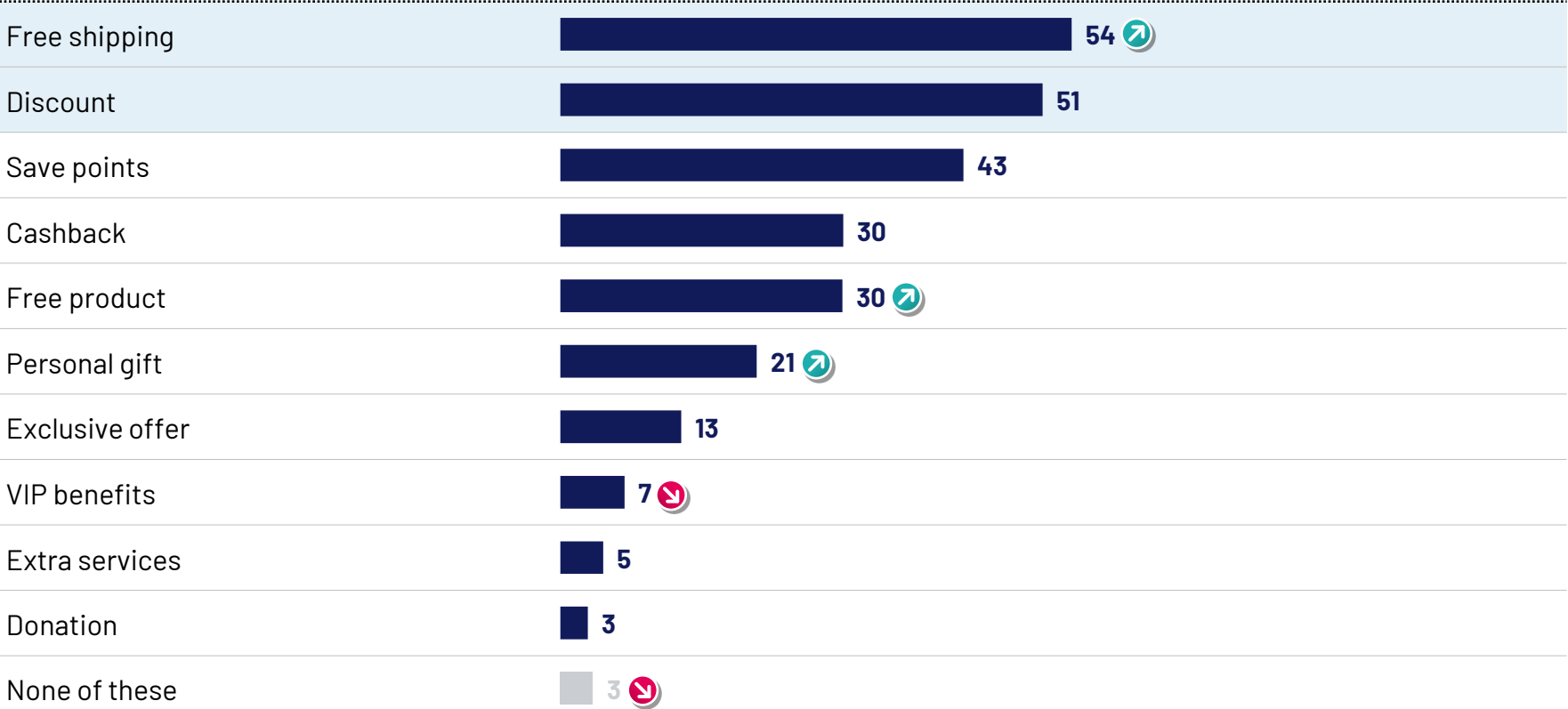


Base: Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months)(n=80 per category on average)
Question: Q54. Think back to the online store where you last purchased the product below. How important are loyalty programs(a reward system through which companies encourage customers to make repeat purchases by offering benefits)in purchasing to you?



WHAT TYPES OF REWARDS ARE MOST IMPORTANT FOR SHOPPERS WHEN ENTERING A LOYALTY PROGRAM?

For half of the online shoppers, free shipping as well as discounts are most important when entering a loyalty program, with the former being increasingly important. Free products & personal gifts are also deemed more important rewards when entering into a loyalty program compared to previous years.



Shoppers from Flanders are more interested in free shipping compared to those from Brussels and Wallonia.

57% of those living in Flanders indicate free shipping is important compared to 49% in Brussels and 52% in Wallonia.

Base: Total sample (n=2010)
Question: Q55. Which of the following type of rewards are most important for you to enter into a loyalty program?

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WHAT'S NEW?

- ❁ The **share who primarily buy on platforms with several providers** has **increased** from 48% in 2025 to a clear majority of 53% in 2026. This growth comes directly at the expense of **specialized webshops**, whose preference has **declined** from 24% to 20%.

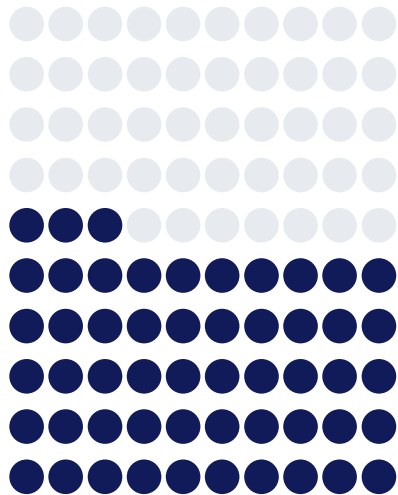
WHAT IS THE ROLE OF PLATFORMS?

DO SHOPPERS PREFER PLATFORMS OR SPECIALIZED WEBSHOPS?

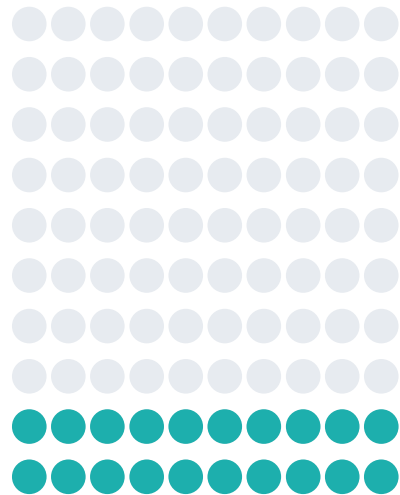
Online shoppers continue to buy mostly on platforms with several providers (and even more so over time), driven by price and range considerations. A specialized webshop is a go-to for 1 in 5, driven by high trust and quality considerations. 1 in 4 claims to have no preference, switching between both.



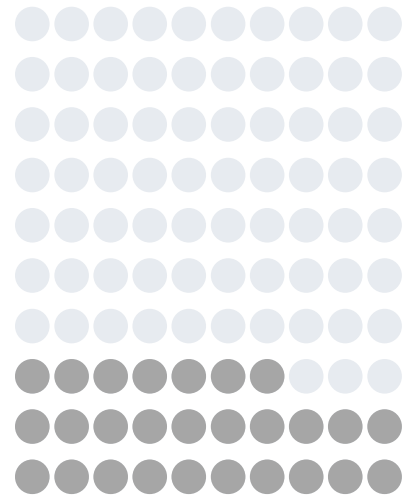
PLATFORMS WITH SEVERAL PROVIDERS



SPECIALIZED WEBSHOPS



NO PREFERENCE



MOST USED CHANNEL

I MOSTLY BUY ON...

Base: Total Sample (n=2010)
Question: Q31. Indicate which statement best describes you when you generally make purchases online.

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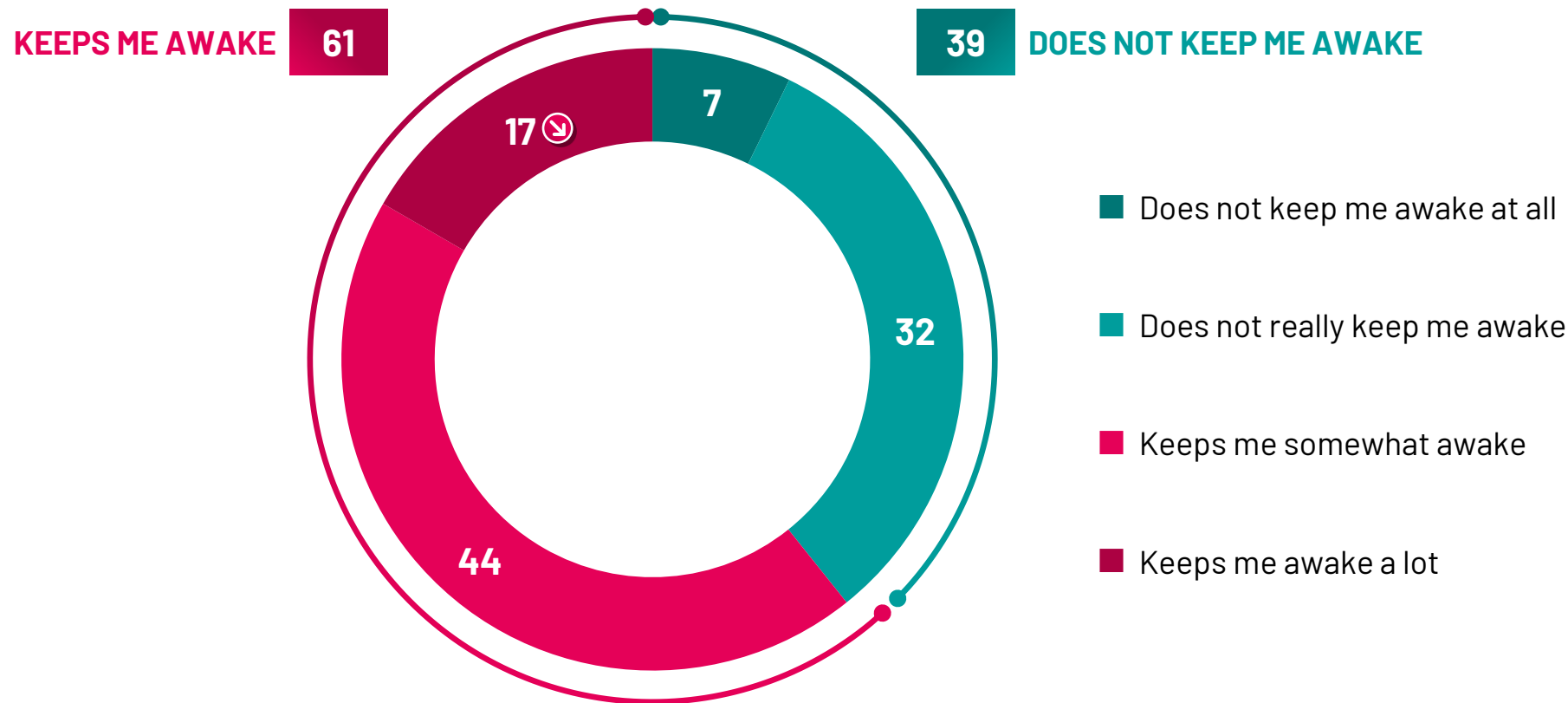
HOW HAVE ONE-CLICK PAYMENT USAGE AND DATA ATTITUDES EVOLVED?

WHAT'S NEW?

- 👁️ The overall **level of concern** about **personal data remains extremely high** and stable (62% in 2025 vs. 61% in 2026)

ARE SHOPPERS CONCERNED ABOUT THE USE OF THEIR PERSONAL DATA?

Grave concern about personal data usage has decreased among online shoppers, but still 3/5 has at least a general concern about their personal data and how it's used.



i Shoppers from Wallonia and Brussels are more concerned.

Base: Total Sample (n=2010)
Question: Q28. To what extent are you concerned about your personal data and how it is used online?



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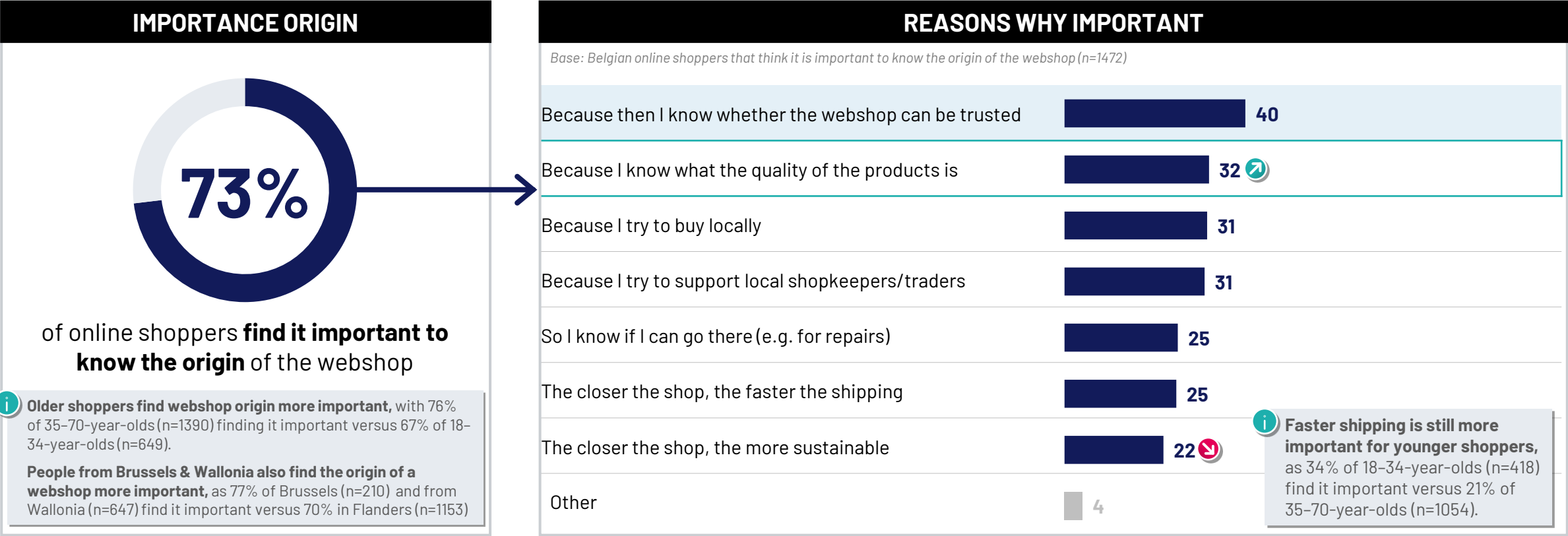
WHAT'S NEW?

-  The importance of webshop origin is stable (from 72% to 73%), but at the same time, **more shoppers find it unclear where a webshop is based** (from 56% to 64%).
-  The "**quality of the products**" has become a **more important** reason for **wanting to know the origin in 2026** (from 26 to 32%).

HOW IMPORTANT IS WEBSHOP ORIGIN?

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

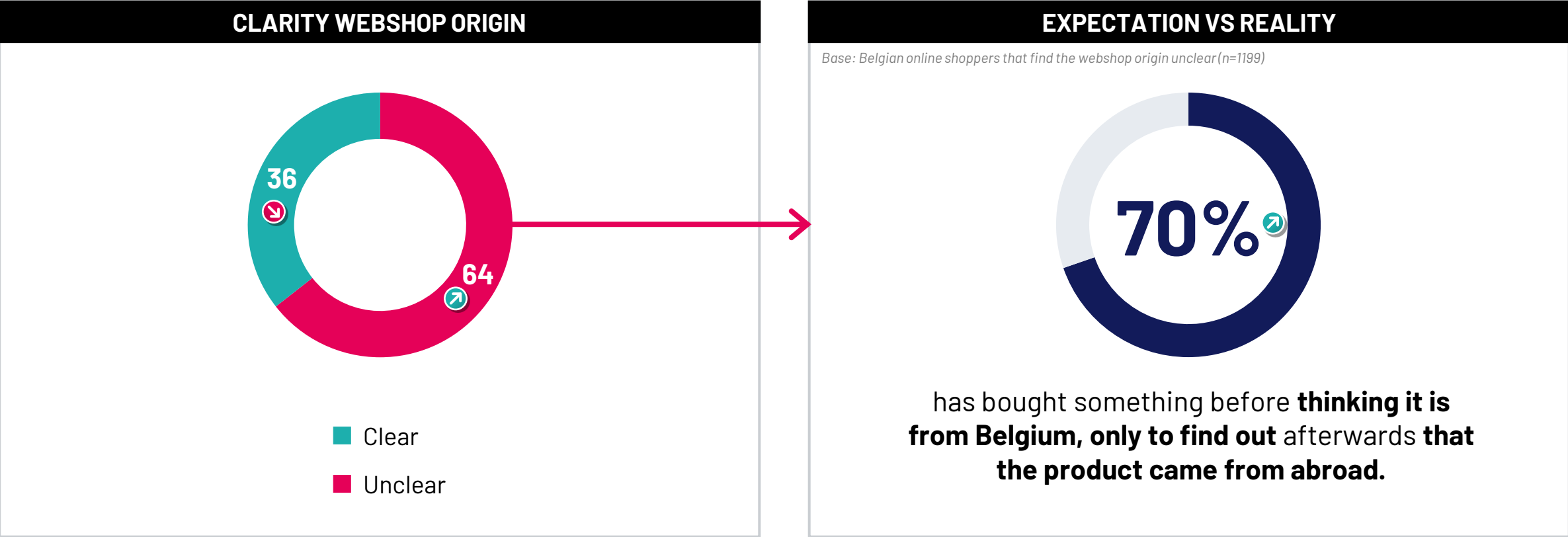
More than 7 in 10 online shoppers find it important to know the origin of a webshop, mainly driven by a need to properly estimate the trustworthiness of the webshop. Quality reasons come second and have increased in importance with locality closely following (trying to buy local & support local shopkeepers).



Base: Total sample (n=2010)
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?

DO SHOPPERS KNOW THE ORIGIN OF A WEBSHOP?

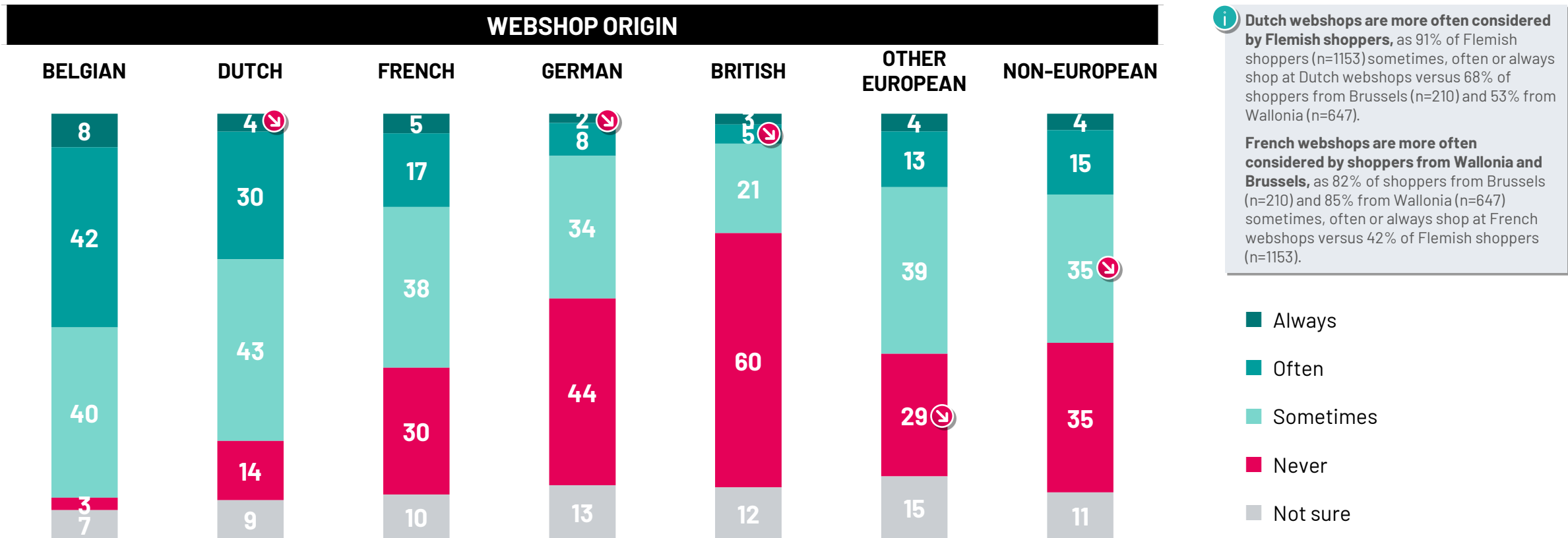
Unclear about the country of origin of a webshop has increased with the large majority indicating the origin is unclear. Consequently, many of those have increasingly bought something thinking it came from Belgium, only to find out afterwards it did not.



Base: Total sample (n=2010)
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?

FROM WHICH WEBSHOPS DO SHOPPERS BUY GOODS AND SERVICES?

Belgian webshops remain the most popular among Belgian online shoppers, followed by Dutch webshops. British webshops are actively bought from by only 3 in 10 shoppers, which is even less than non-European webshops.



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WHAT'S NEW?

- 📱 The **penetration of Asian webshops is stable**, but **more** have bought from **Temu** and **Shein**.
- 📱 The major new insight in 2026 is the analysis of **attitudes** towards the **upcoming European tax on parcels**. This shows that **2 out of 5 consider it a good measure**, but it will **not completely deter most current buyers**.

HOW ARE ASIAN WEBSHOPS DISRUPTING THE BELGIAN E-COMMERCE MARKET?

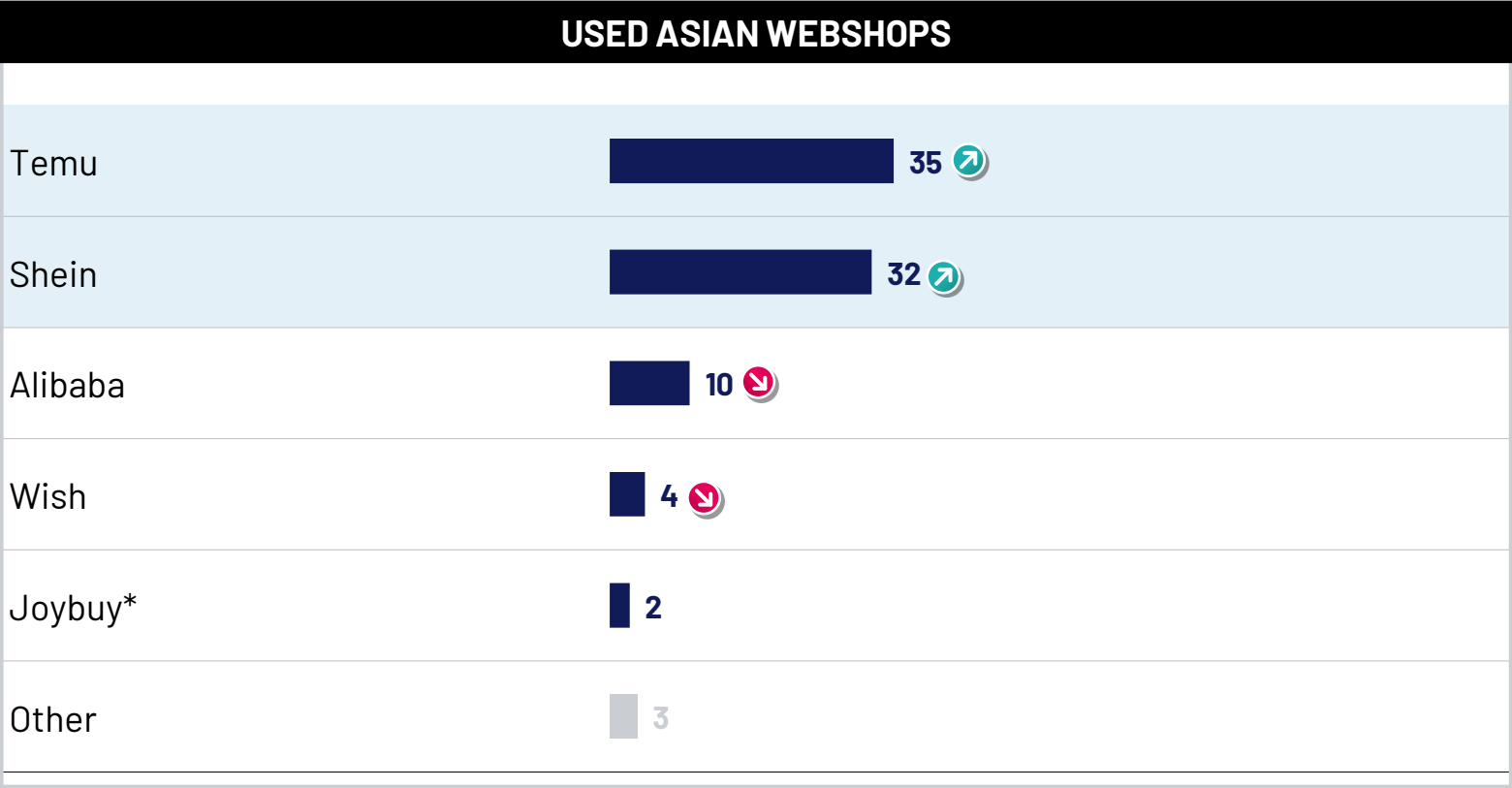
THROUGH WHICH ASIAN ONLINE STORES DID SHOPPERS ALREADY PURCHASE?

Over half of online shoppers have already purchased something through an Asian webshop. Temu and Shein are the most used platforms, and have increased in popularity. Joybuy is the least popular among the major Asian webshops.



Base: Total sample (n=2010)
Question: Q60. Indicate at which of the Asian web shops below you have made online purchases in the past year.

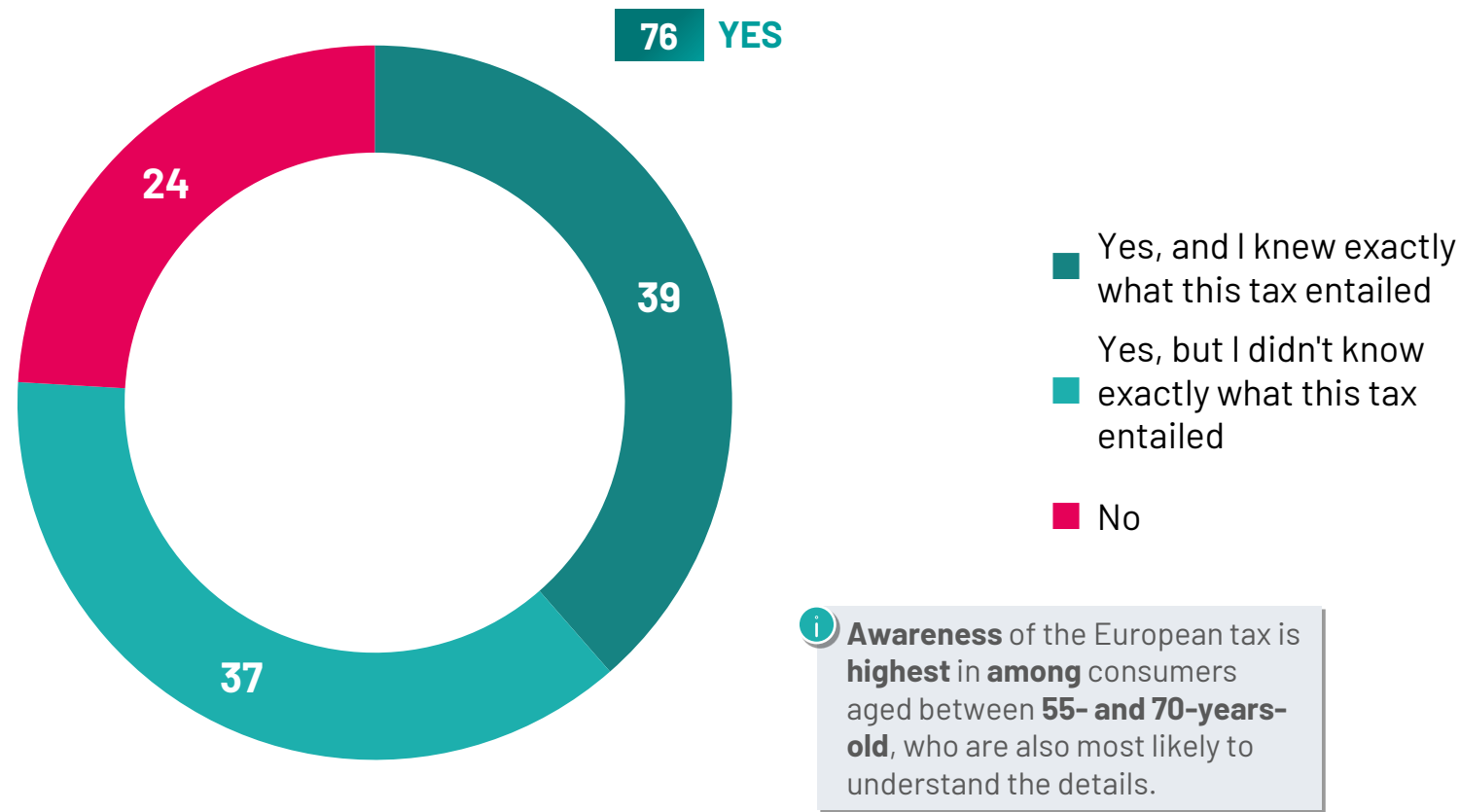
**New added item in wave 2026*



Belgian shoppers buying from Asian webshops are more often young women from Wallonia and have kids.

ARE SHOPPERS AWARE OF THE EUROPEAN TAX ON PACKAGES FROM OUTSIDE THE EU?

2 in 5 has a decent awareness on the European tax on packaging coming from outside the EU. 1 in 4 is completely unaware.



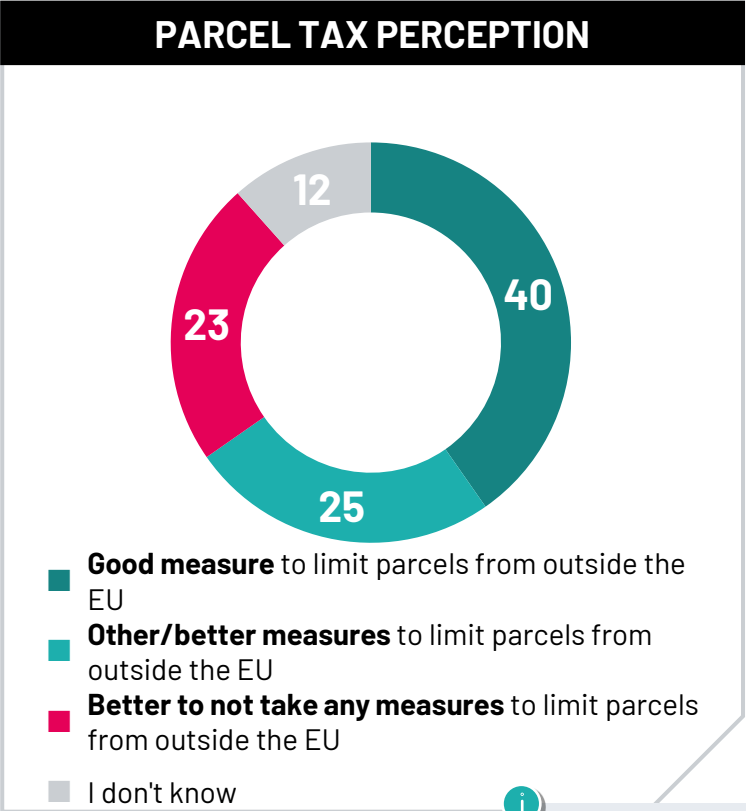
**New added question in wave 2026*

Base: Total sample (n=2010)
Question: Q87. Starting in July 2026, a European tax will be imposed on packages valued at less than 150 euros that originate outside the European Union. The tax will amount to 3 euros per product type. For example, for a package containing 1 silk blouse and 2 wool blouses, a total of 6 euros will be due: 3 euros for the silk blouse and 3 euros for the 2 wool blouses.



HOW DO SHOPPERS STAND AGAINST THE EUROPEAN TAX ON PACKAGES FROM OUTSIDE THE EU?

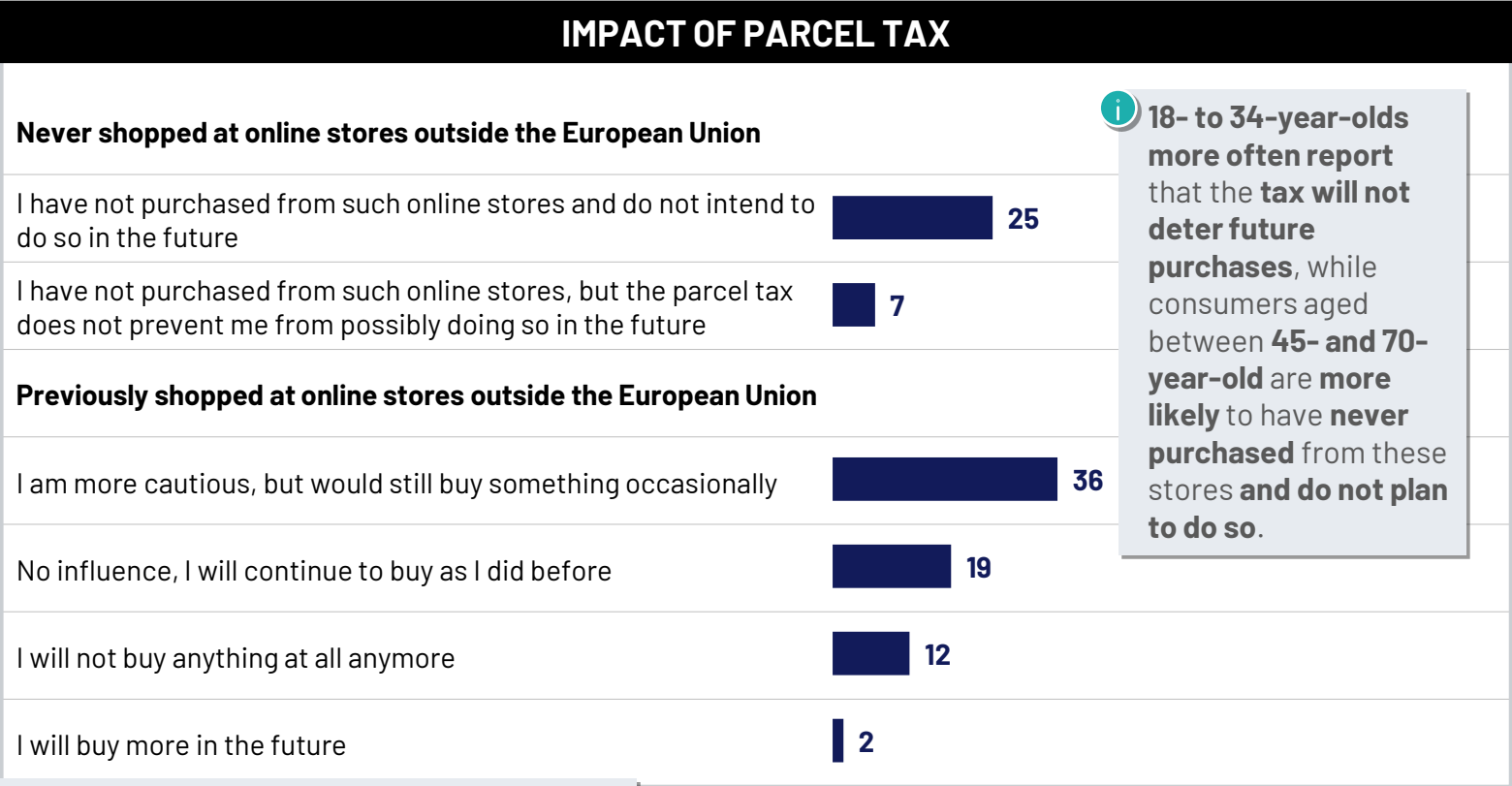
2/5 find the parcel tax a good measure, those who remain and have an opinion are equally split between there potentially being better measures or prefer not to have any actions taken. 1/4 who have never shopped at online stores outside the EU would also not intend to do so in the future. About 1/3 who have, would be more cautious but would still buy something occasionally.



i *New added questions in wave 2026

Base: Total sample (n=2010)
Question: Q91. What do you think of this parcel tax, which will be introduced in July on parcels worth less than 150 euros that come from outside the European Union? / Q88. How will this parcel tax affect your willingness to shop at these online stores?

i **35- to 70-year-olds** are more likely to view the tax as a **good measure**, while **18-34-year-olds** are more likely to believe **better measures exist**.



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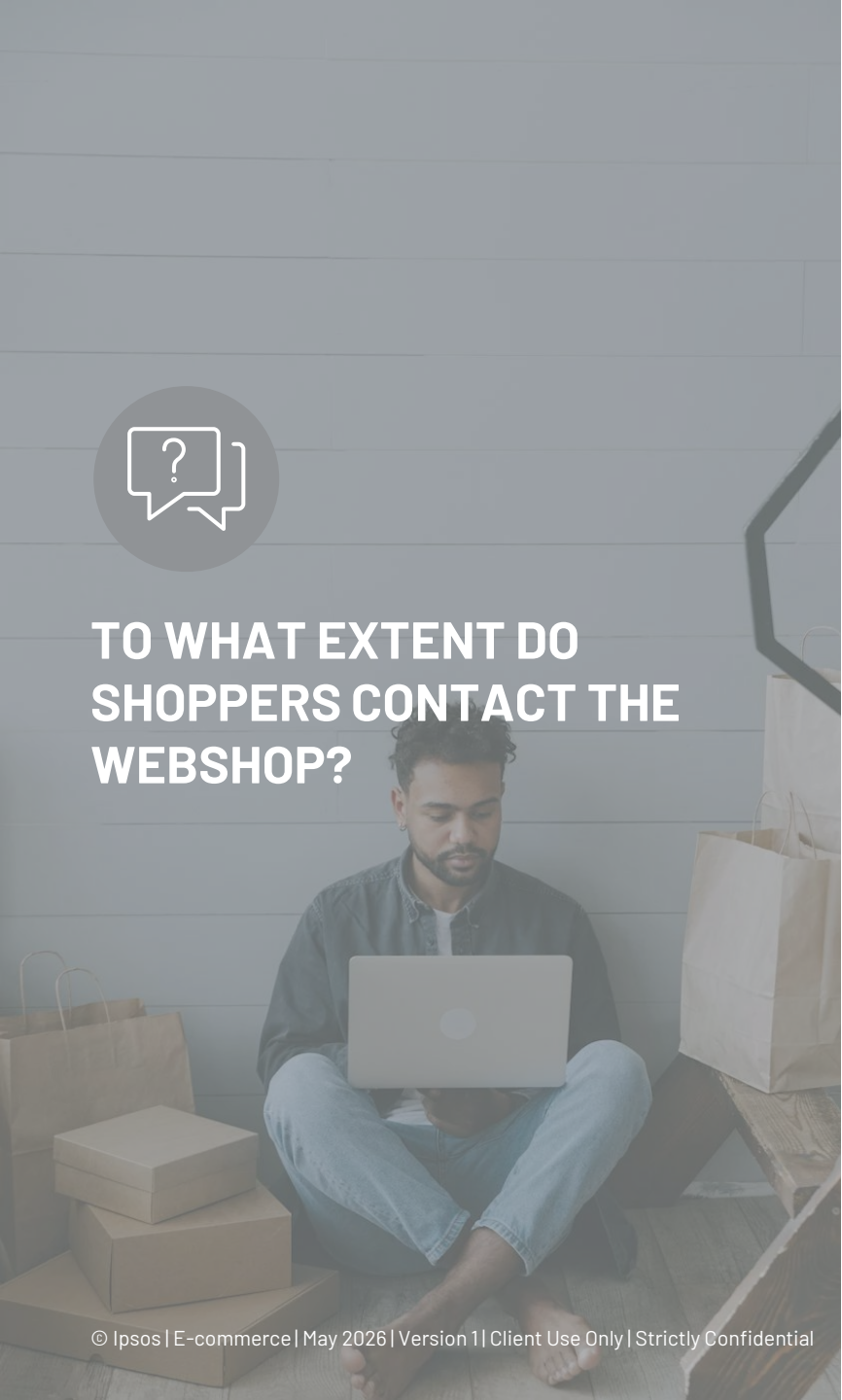
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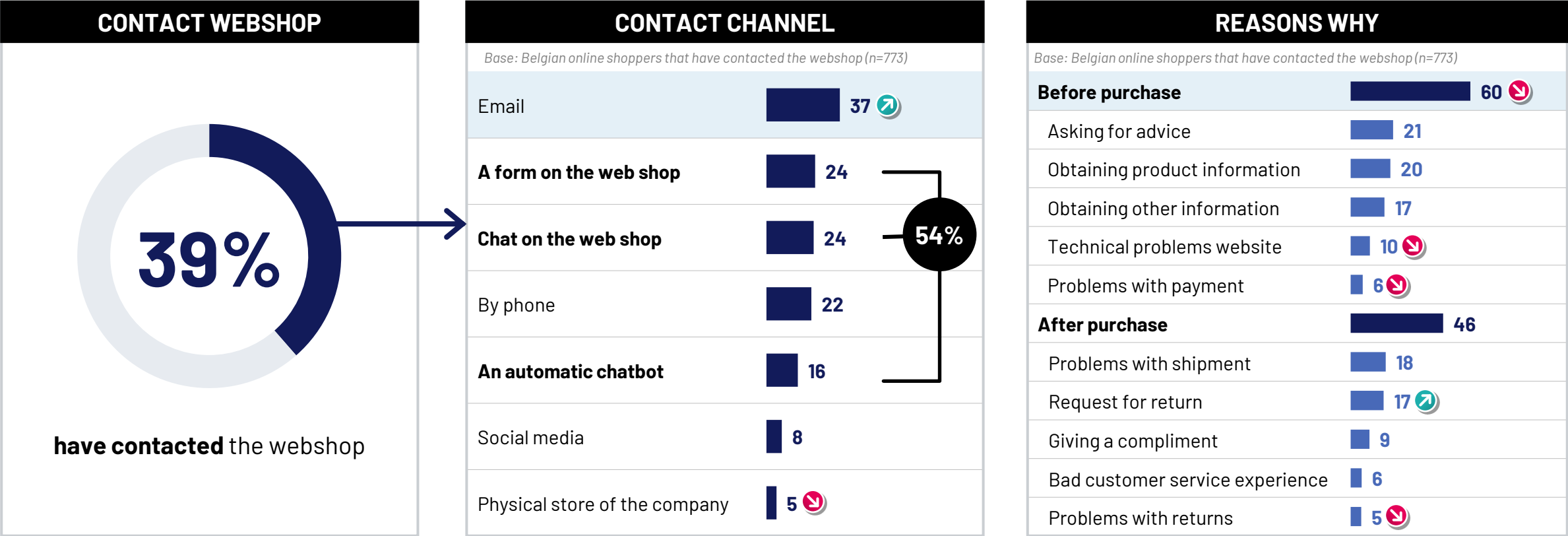
-  The **reasons** for contacting a webshop are **shifting**. In 2026, there is a sharp increase in contact for **return requests** (from 10% to 17%), while contact due to technical problems is decreasing (from 18% to 10%). This suggests that the technical side of webshops is improving, but **post-sale service** (returns) is becoming a **more important** point of contact.



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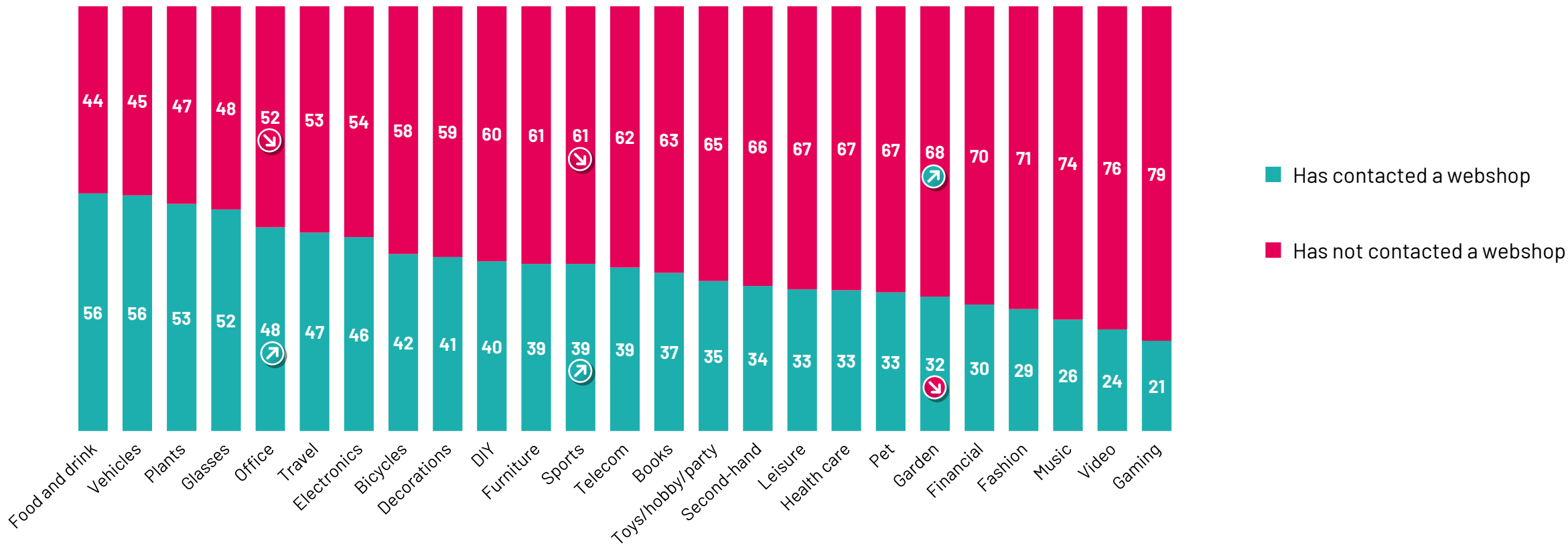
DO SHOPPERS CONTACT THE WEBSHOP? HOW AND WHY?

Almost 2 in 5 online shoppers have contacted a webshop concerning their purchase. About half of them have used the webshop itself to do so, e-mail is still the most popular way channel and has even increased in popularity. Shoppers are most likely to contact the webshop before their purchase, mainly to ask for advice or additional info. Contact after purchase usually entails problems with shipment or requests for returns, with the latter being an increased driver for contact after purchase.



DO SHOPPERS CONTACT THE WEBSHOP? – PER PRODUCT CATEGORY

Shoppers buying food and drinks or vehicles show most contact with the webshop. Those buying music, video, and gaming products are least likely to do so. There’s an increase in those contacting the webshop for purchases related to office and sports.

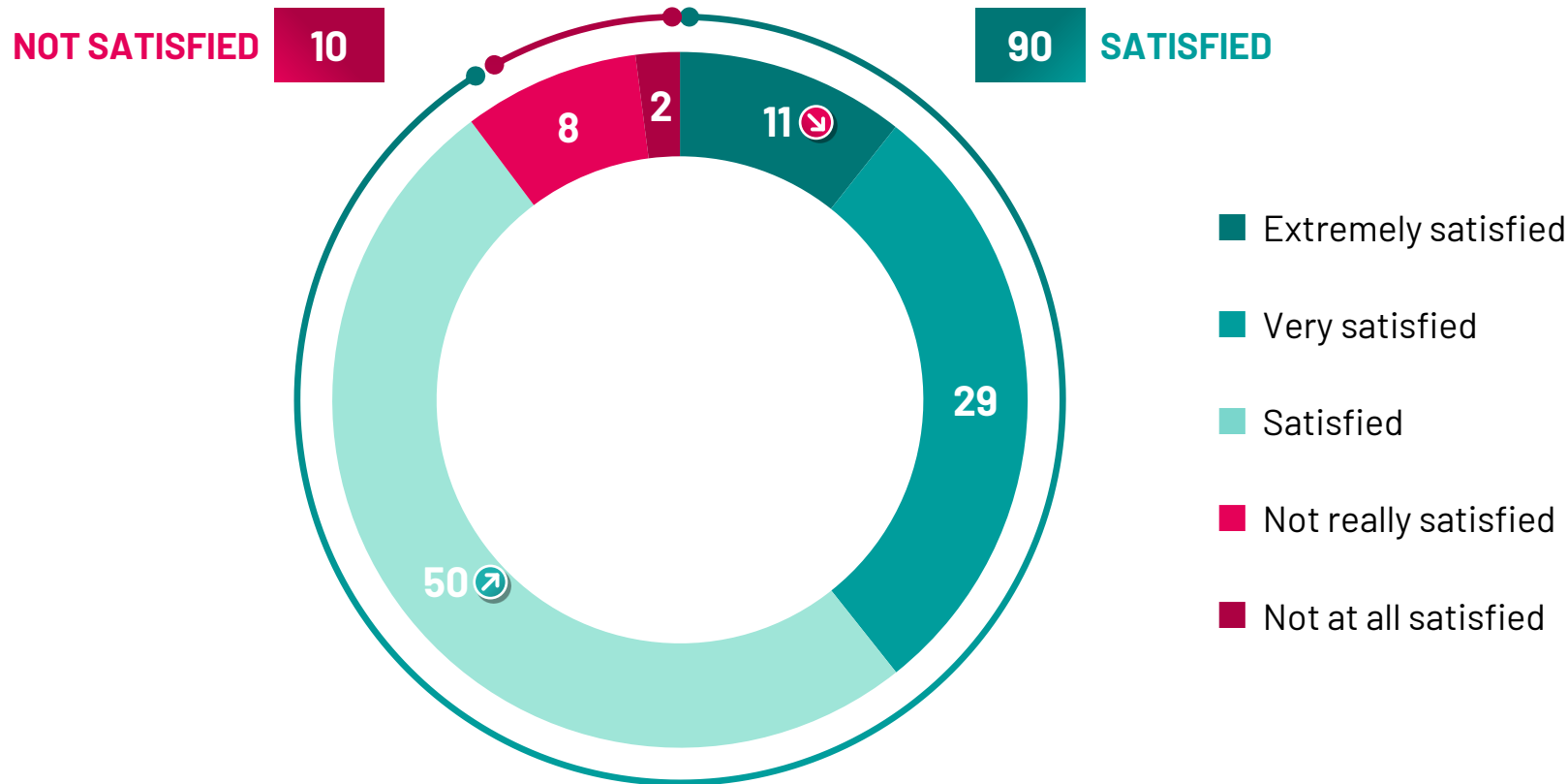


Base: Those that were allocated to the product category (least fill allocation, based on what they bought in the past 12 months)(n=80 per category on average)
Question: Q44. Have you ever contacted a webshop for online purchases?



ARE SHOPPERS SATISFIED WITH THE CONTACT OF THE WEBSHOP?

9 in 10 shoppers are satisfied with the contact they had with the webshop. Though there's a decrease in those being extremely satisfied.



i 18-to-24-year-olds are more often not satisfied, as 17% of online shoppers between 18 and 24 years old (n=112) are not satisfied with the contact, versus 9% for 25-to-70-year-old shoppers (n=661).

Base: Belgian online shoppers that have contacted the webshop (n=773)
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 still drive satisfaction most with increased impact of the former. The ease of use in terms of chat and form are least important.



Base: Belgian online shoppers that have contacted the webshop (n=773)
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?

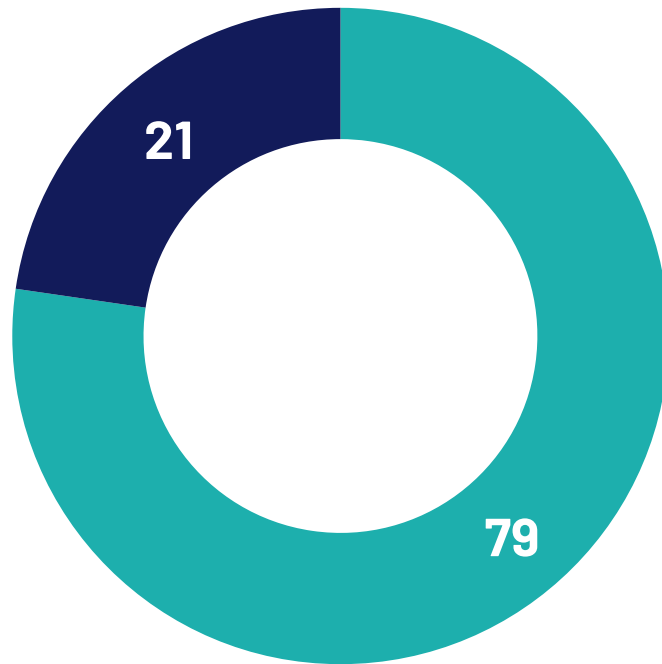
Consequently, a slow response is the main driver of dissatisfaction about the webshop contact. Followed closely by incompetence of employees and difficulty to contact.



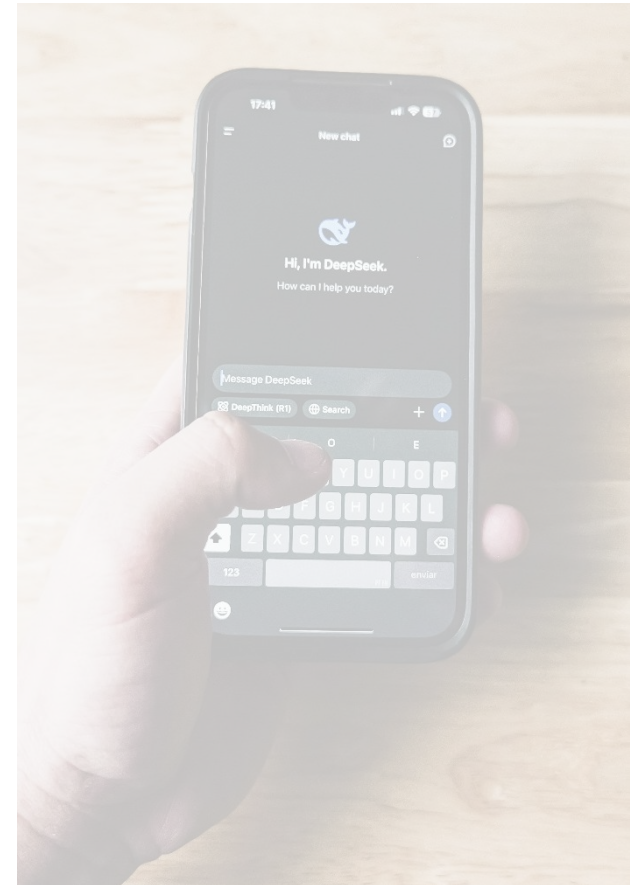
Base: Belgian online shoppers that have contacted the webshop (n=773)
Question: Q47. How satisfied were you with the contact with the shop? / Q49. Why were you dissatisfied with the contact with the shop?

HUMAN ASSISTANCE ZOOM: DO SHOPPERS PREFER HUMAN ASSISTANCE?

Almost 4/5 shoppers prefers having contact with a human employee instead of with a chatbot.



- Contact with a **human employee**, allowing for a slightly longer wait time
- A **chatbot** that provides standard/personalized answers to help you immediately



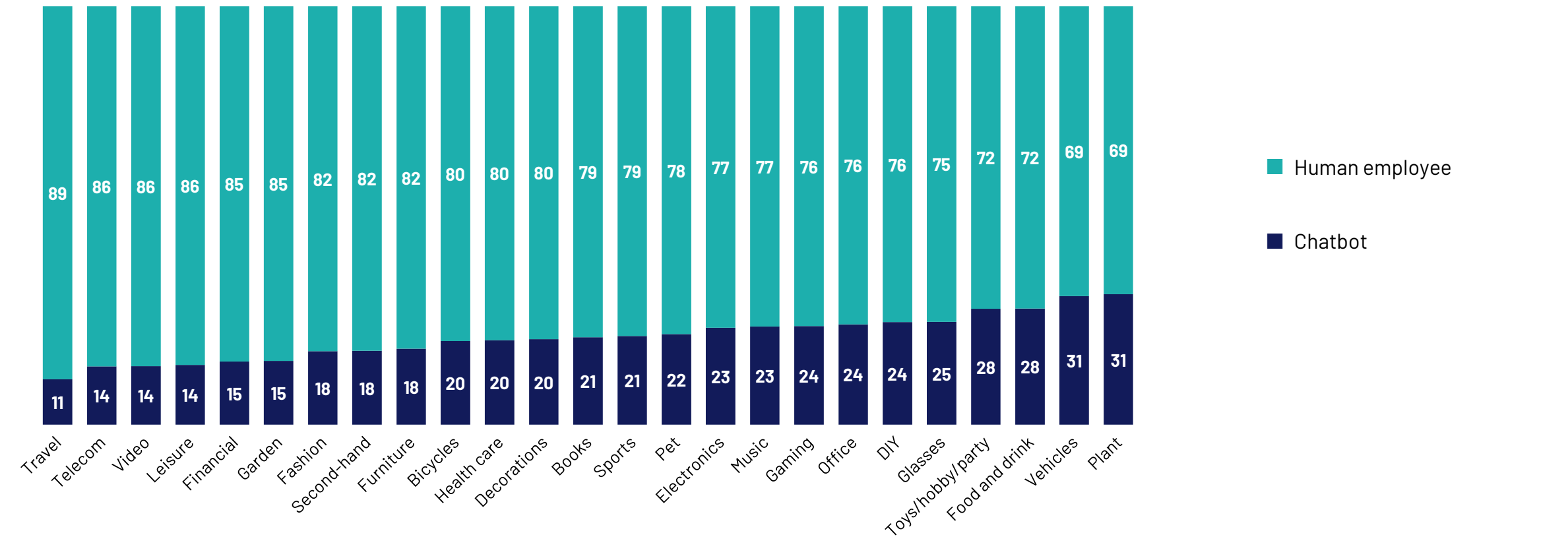
 *New added question in wave 2025

Base: Total sample (n=2010)

Question: Q53. Suppose you want to contact the web shop (for a question, problem, report, ...) for online purchases within the category. Which of the following do you prefer?

HUMAN ASSISTANCE ZOOM: DO SHOPPERS PREFER HUMAN ASSISTANCE? – PER PRODUCT CATEGORY

Human assistance is preferred across categories but especially important for travel, telecom, video, leisure, financial & garden products.



**New added question in wave 2025*

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: Q53. Suppose you want to contact the web shop (for a question, problem, report, ...) for online purchases within the category. Which of the following do you prefer?



INTRO



WHAT DO PEOPLE
SHOP ONLINE?

ONLINE PATH TO PURCHASE



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 AND DATA
ATTITUDES EVOLVED?



HOW IMPORTANT IS
WEBSHOP ORIGIN?



HOW ARE ASIAN
WEBSHOPS DISRUPTING
THE BELGIAN
E-COMMERCE MARKET?



TO WHAT EXTENT DO
SHOPPERS CONTACT
THE WEBSHOP?



INNOVATIONS



WHAT DO SHOPPERS THINK OF THE PROPOSED INNOVATIONS?

SIZE ASSISTANTS AND DIGITAL PRODUCT PASSPORT MOST CONVINCING



SIZE ASSISTANT

Tap into a demonstrated need from Belgian online shoppers, resulting in **fair share** that is **interested** in using it (3/5), but **privacy concerns** should be addressed to turn interest into real conviction by a large majority



SOCIAL PROOF

Belgians are **skeptical** towards information from webshops on stock info and the buyer share. 3 in 5 is currently not convinced of the helpfulness of social proof. Messages should play on **discounts**, **promotions** and **review info/information on rates**



BUYING VIA WHATSAPP

Current awareness is low and future usage intention moderate (2/5). Wider adoption is again hindered by questions on **safety** of payments and **privacy** related matters.



HEADSETS

Large majority **convinced** by the helpfulness of headsets in direct communication to improve **efficiency**, but concerns on **approachability** of the staff and **trust** to overcome.



DIGITAL PRODUCT PASSPORT

Belgian online shoppers are **receptive** towards QR codes for more information. It should focus on info on **maintenance** or **repair**, **origin** of the products and materials used.

SIZE ASSISTANT

CONCEPT 1



HOW DO SHOPPERS STAND TOWARDS ESTIMATING SIZES AND SHARING DATA DOING SO?

3 out of 5 (strongly) agree estimating the size of a product can be difficult.
A similar share has (strong) concerns privacy concerns of sharing sizes or photos with an online store.

I find it **difficult** to **estimate** the **size** of a product based on its described size or dimensions



Strongly disagree

Somewhat disagree

Somewhat agree

Strongly agree

I am **concerned** about my **privacy** when sharing sizes or photos with an online store



i Shoppers who are concerned about privacy when sharing sizes, are more often the ones who struggle with estimating sizes.

i *New added question in wave 2026

Base: Total sample (n=2010)
Question: Q81. Evaluate the following statements.

SIZE ASSISTANT

A digital assistant that helps you choose the right size or product when shopping online. Based on a few details (such as height and weight, room dimensions, etc.), or an optional scan with your camera), you'll immediately receive personalized recommendations for clothing, furniture, home decor, and electronics that might be a good fit.



No obligation: You can choose whether to enter your information or use a scan.



Sustainable: Choosing the right size or product means fewer returns, which is better for the environment.



Quick: The whole process takes less than a minute

MySize ASSIST

Met behulp van kunstmatige raden we een maat aan op b
geslacht, leeftijd, lengte, gew
pasvorm voorkeur

Geslacht **1**

Vrouw

Leeftijd

40

Lengte (cm)

170

Gewicht (kg)

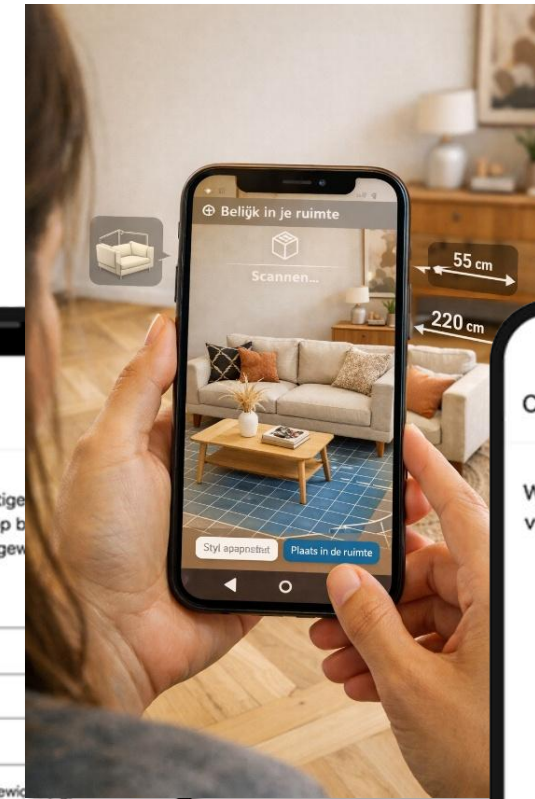
66

Pasvorm voorkeur

Strak Standaard Los

MIJN MAAT CONTROLEREN

TERUG



Camerascan

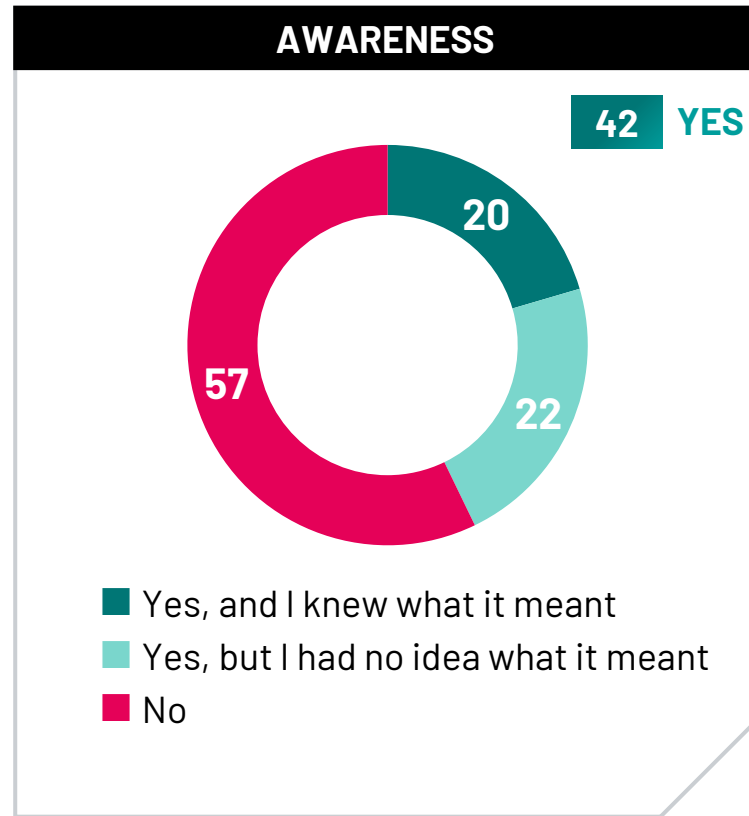
We scannen je lichaam door een foto van de voor- en zijkant te maken met je telefoon.

DOORGAAN

DE SCAN ANNULEREN

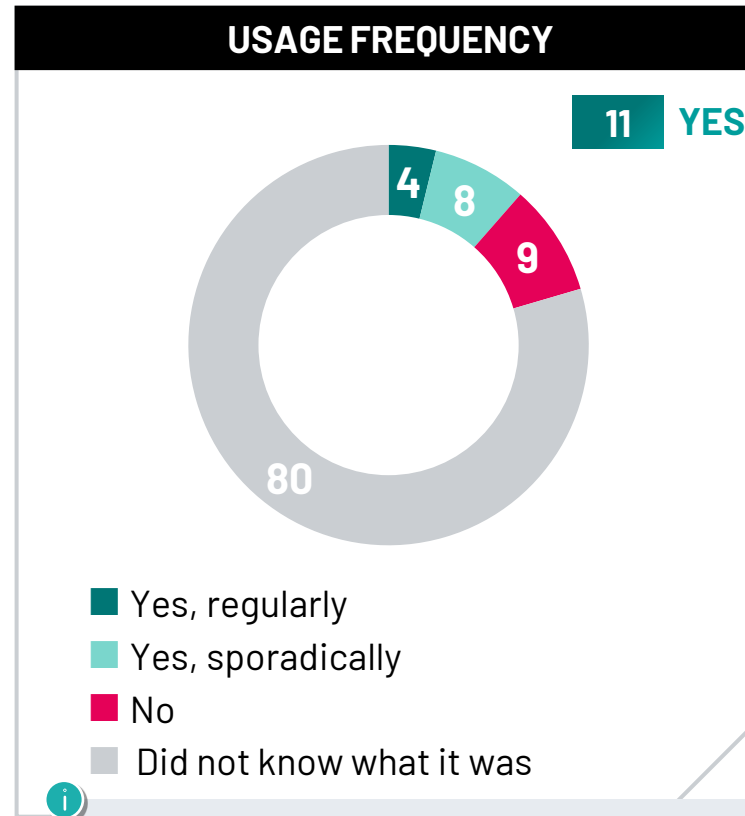
HOW MANY SHOPPERS ARE FAMILIAR WITH SIZE ASSISTANTS, HOW MANY USE THEM, AND WHO WILL START USING THEM?

1 in 5 is aware of what a size assistant exactly entails. Another, similar share has vaguely heard about it. Current adoption is very limited to less than 5% regularly using it, but almost 3 in 5 is interested to do so in the future.

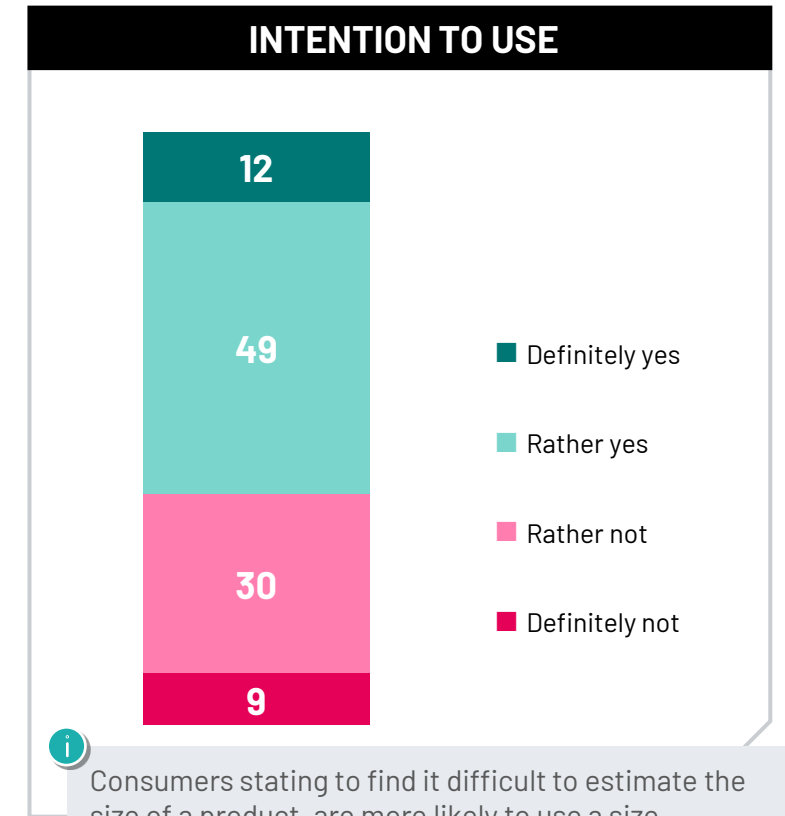


**New added questions in wave 2026*

Base: People who evaluated the innovation (n=403)
 Question: I1a. Had you heard of this concept before? / I1b. Have you ever used a size assistant like this? /
 I1f. If this were available on an online store where you regularly shop (such as for clothing, eyewear, skincare, home decor, etc.), would you use it?



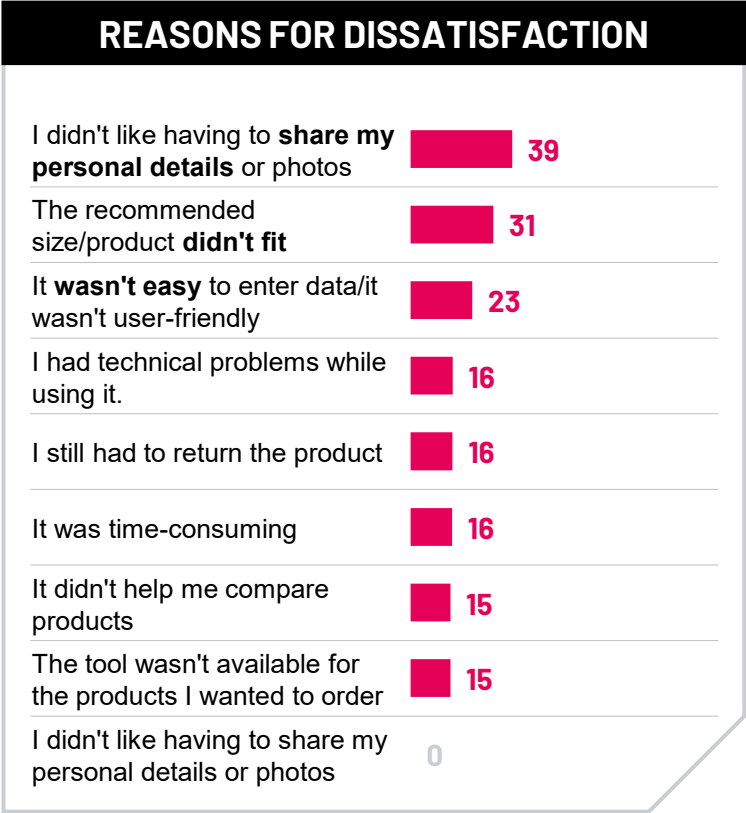
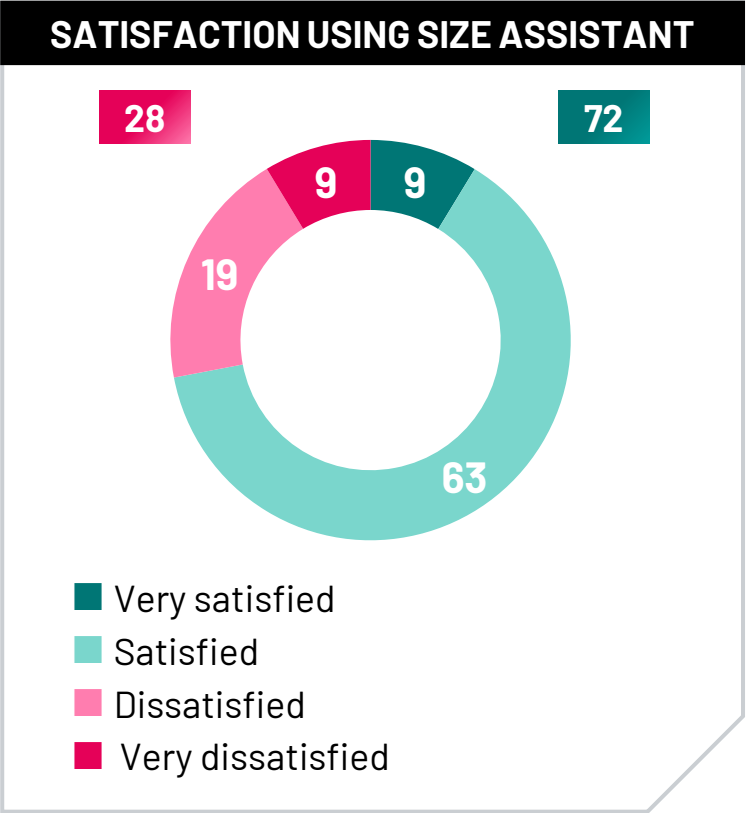
18- to 24-year-olds more often used a size assistant.



Consumers stating to find it difficult to estimate the size of a product, are more likely to use a size assistant (62% vs. 56%)

HOW SATISFIED ARE SHOPPERS WITH SIZE ASSISTANTS AND WHY (NOT)?

Current satisfaction with size assistants is high (72% is satisfied). Satisfaction drivers are avoidance of returns as well as being able to only order one size and user-friendliness of entering the required data. Dissatisfaction has to do with not liking to share personal details and photos as well as poor product fit in the end.



**New added questions in wave 2026*

Base: Current users of a size assistant (n=46) / Users satisfied with a size assistant (n=33) / Users dissatisfied with a size assistant (n=13*)

Question: I1c. How satisfied were you with using a size assistant? / I1d. Why were you satisfied? / I1e. Why were you dissatisfied?

HOW DO SHOPPERS FEEL ABOUT A SIZE ASSISTANT?

Around 3 in 5 would use a size assistant tool which can be applied to different websites to facility online shopping. A similar share feels the concept could speed up their shopping process. Just 2 in 5 are convinced they would buy more products

I would use **a tool** where I only have to **upload** my body **measurements**, the **dimensions** of a room, or a **photo** of myself/this room once, which is then **applied to different websites to make online shopping easier**



Definitely not

Rather not

Rather yes

Definitely yes

I would **buy more products** if I had a size assistant to help me



I think a size assistant could **speed up** the purchasing process



**New added question in wave 2026*

Base: People who evaluated the innovation (n=403)
Question: 11i. Now evaluate the following statements.



18- to 24-year-olds are **more likely to use** a **size assistant** tool **and would buy more products** because of a size assistant tool, while **Flemish** shoppers **do not believe it would lead to more purchases**. **Brussels shoppers**, on the other hand, are **more likely to believe it would accelerate the purchasing process**.

WHICH SIZE ASSISTANT WOULD SHOPPERS PREFER TO USE ON A WEBSHOP?

3 in 5 intends to use a size assistant when available on a webshop. Manually entering measurements and scanning via photos are the prefer ways to adopt such a tool.

61% intends to use a size assistant when available on a webshop

Manually enter measurements



Scan via photos



Based on visual examples of a body or space, room, etc.



Intends not to use it



 *New added question in wave 2026

Base: People who evaluated the innovation (n=403)

Question: 11f. If this were available on an online store where you regularly shop (such as for clothing, eyewear, skincare, home decor, etc.), would you use it? / 11g. Which method would you prefer to use?

FOR WHICH PURCHASES DO SHOPPERS CONSIDER USING A SIZE ASSISTANT?

Roughly 3 out of 5 would use a size assistant, regardless of the fact whether they are familiar with the brands, stores, products, ... or not. Even for more expensive purchases, interest is fairly high.

For purchases from **brands** I am **not** yet **familiar with**



Definitely not

For **purchases** from **stores**/online **shops** I am **not** yet **familiar with**



Rather not

For **products** I have not purchased before/for products whose fit I am **not** yet **familiar with**



Rather yes

For more **expensive** products



Definitely yes

**New added question in wave 2026*

Base: People who evaluated the innovation (n=403)
Question: 11h. To what extent would you use a size assistant for your next purchases?

55- to 70-year-olds are **more reluctant** to use a **size assistant** for **unfamiliar brands or stores**. **Shoppers from Brussels**, on the other hand, are **more willing** to use it for **purchases from unfamiliar stores**.

SOCIAL PROOF

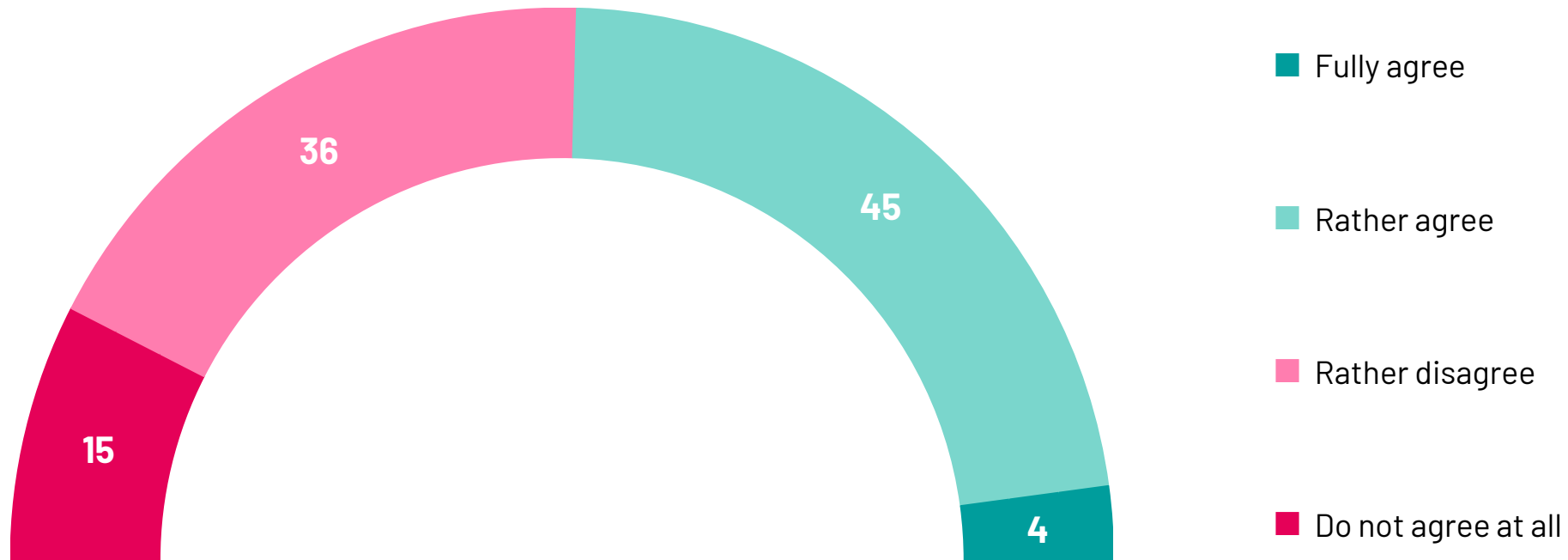
CONCEPT 2



DO SHOPPERS TRUST THE INFORMATION ABOUT INVENTORY AND PURCHASING COMMUNICATED BY ONLINE STORES?

Belgian online shoppers are split in terms of trusting online stores around communication on products bought or products in stock.

*"I **trust** the **information** on online stores that shows how many people have purchased a product or how many are still in **stock**."*



i *New added question in wave 2026

Base: Total sample (n=2010)
Question: Q81. Evaluate the following statement.

i Agreement is higher among 18- to 34-year-olds, while disagreement is higher among 55- to 70-year-olds and shoppers from Flanders.

SOCIAL PROOF

On a product page, you'll see **subtle prompts that show how other customers are experiencing or purchasing the product**. Think of phrases like "15 people bought this recently" or "Popular this week." The goal is to help you **make a choice with greater confidence** by showing you what other shoppers are doing. This isn't meant to pressure you, but rather to help you gauge a product's popularity and relevance.



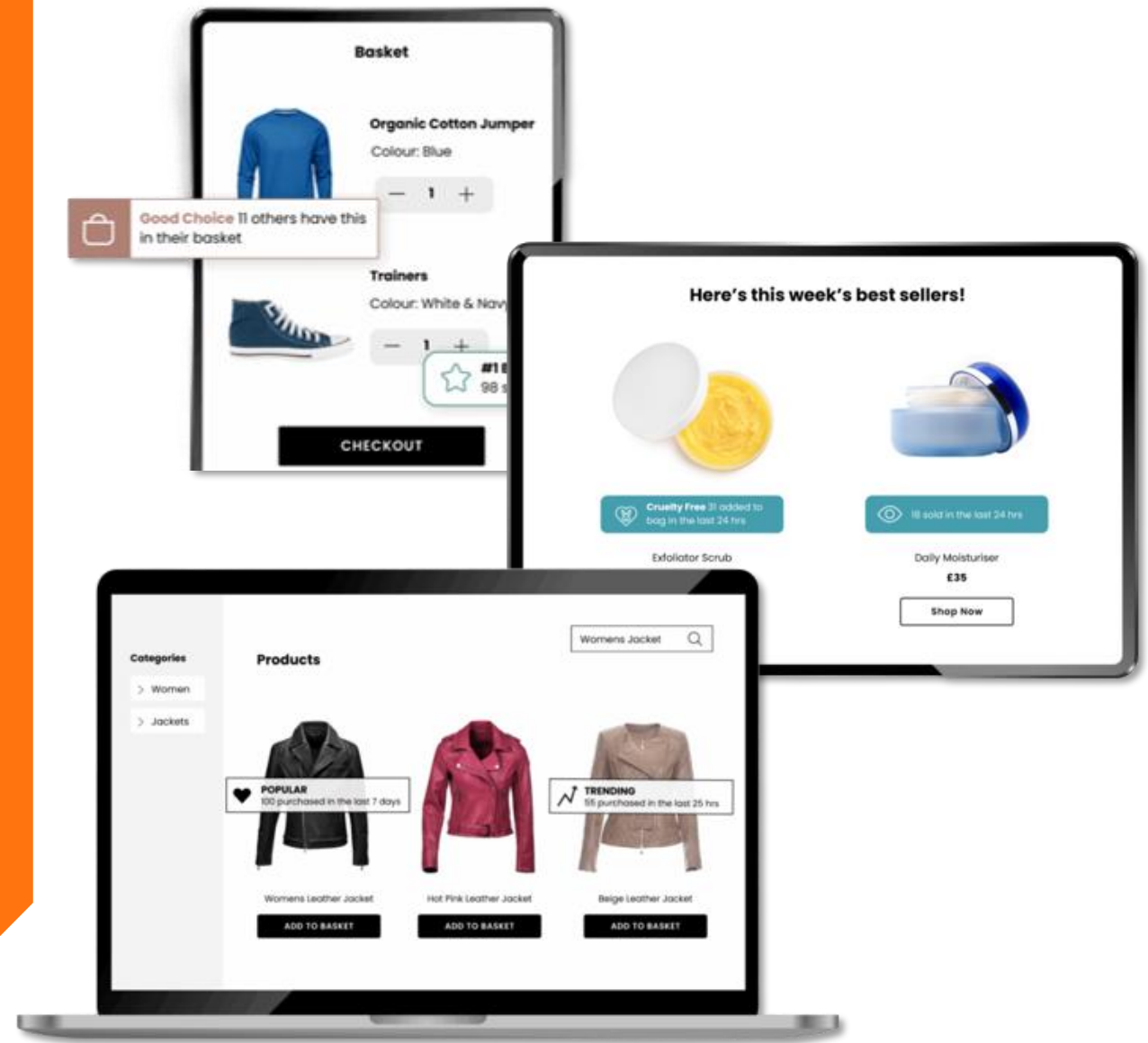
The information is based on real and recent data



No personal information about other customers is displayed

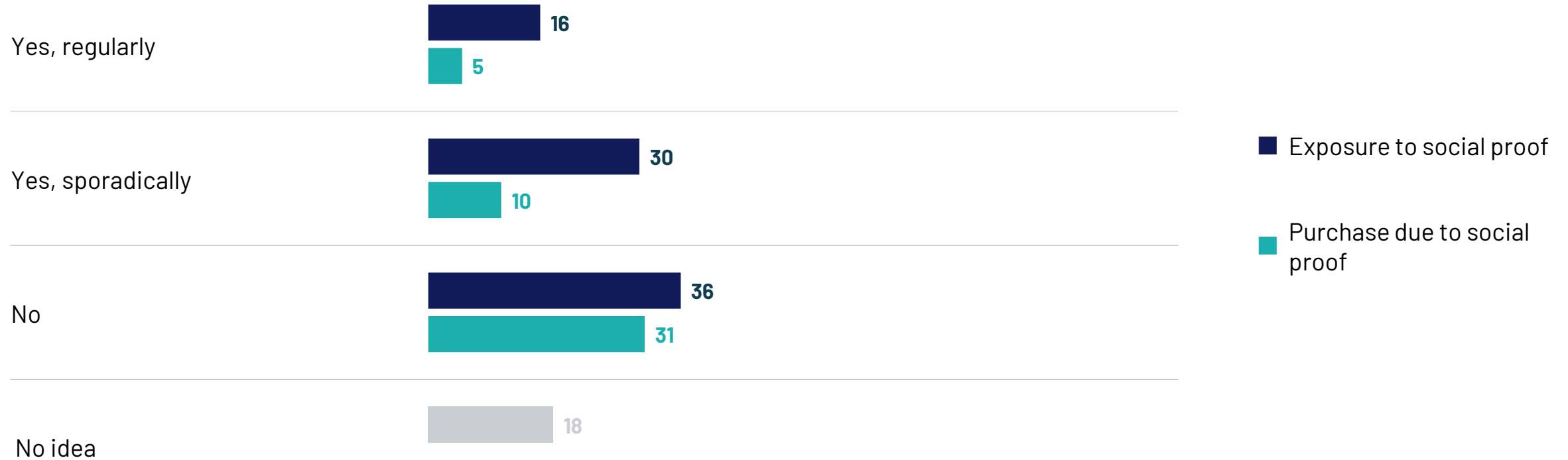


It's not about fake reviews or artificial scarcity



HOW OFTEN HAVE SHOPPERS SEEN SOCIAL PROOF AND HOW OFTEN HAVE THEY BOUGHT SOMETHING DUE TO SOCIAL PROOF?

Just under half of Belgian online shoppers has been exposed to social proof (mostly only sporadically). Only 15% has already bought something because of it.



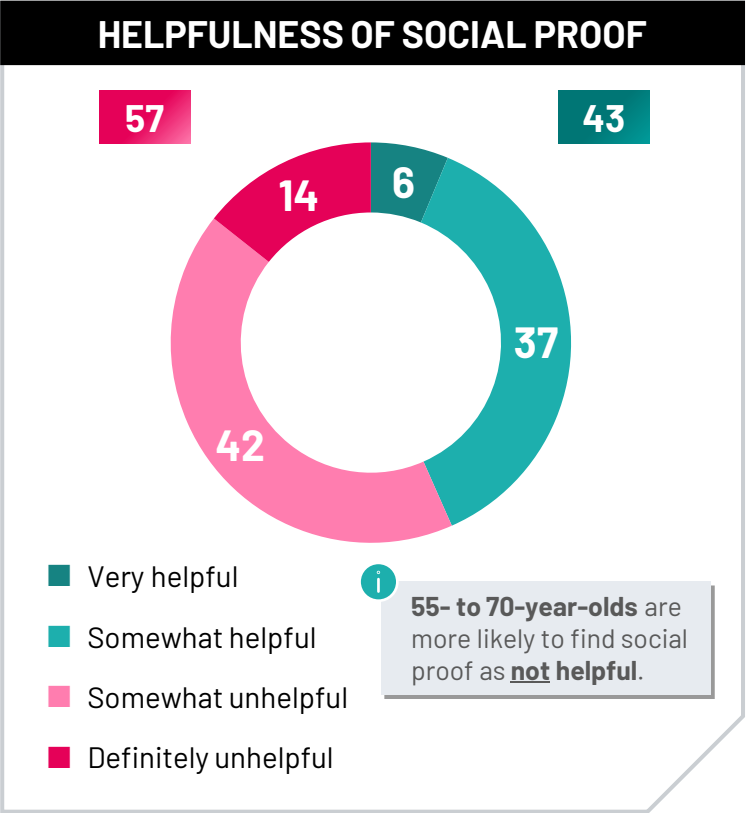
 *New added question in wave 2026

Base: People who evaluated the innovation (n=396)

Question: I2a. Have you ever seen social proof on websites? / I2b. Have you ever purchased a product because of social proof?

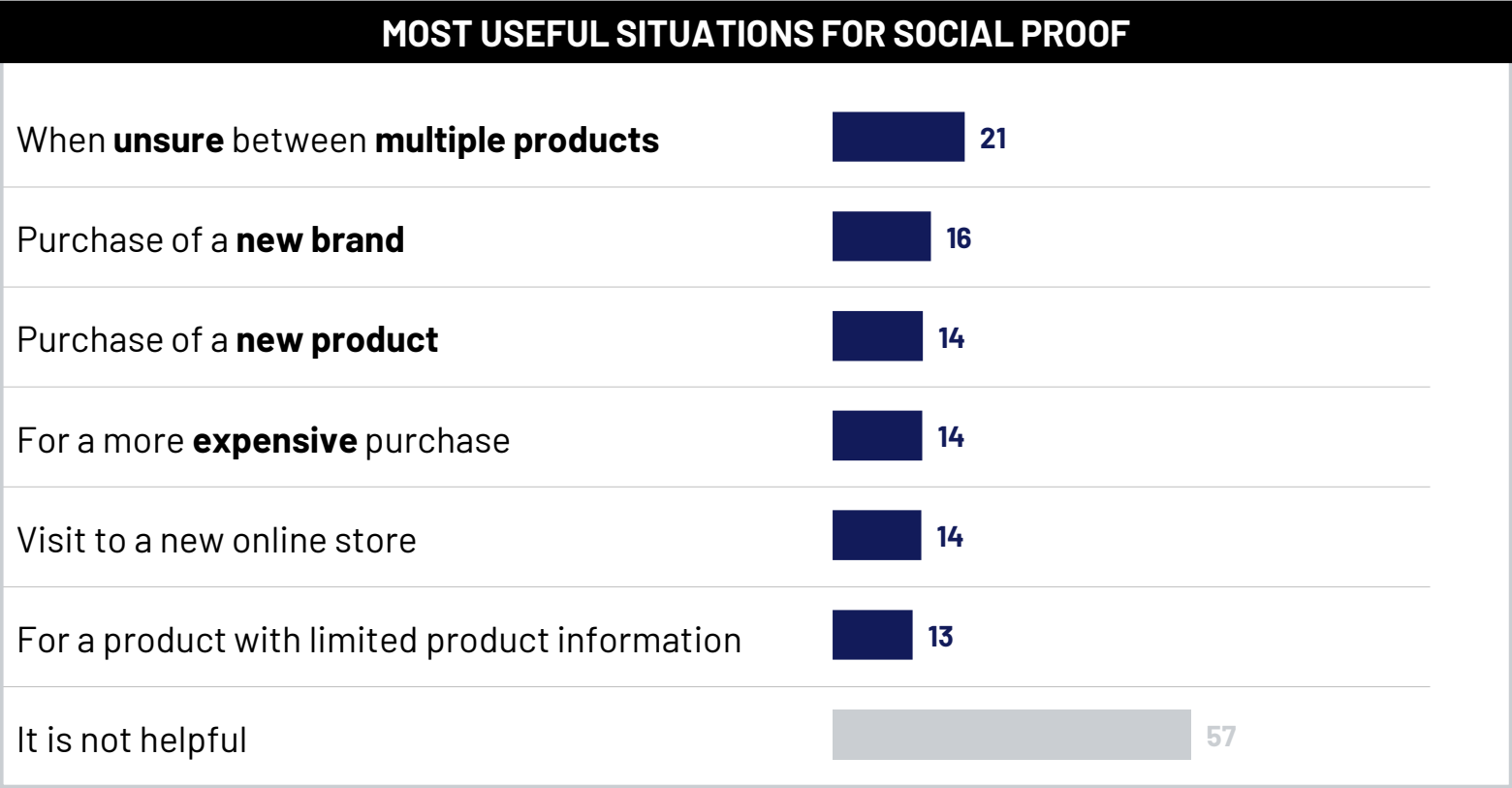
HOW HELPFUL DO SHOPPERS FIND SOCIAL PROOF AND IN WHAT SITUATIONS IS IT MOST USEFUL?

2 in 5 feel ‘social proof’ could be somewhat helpful when making online purchases, mainly when they doubt between multiple products.



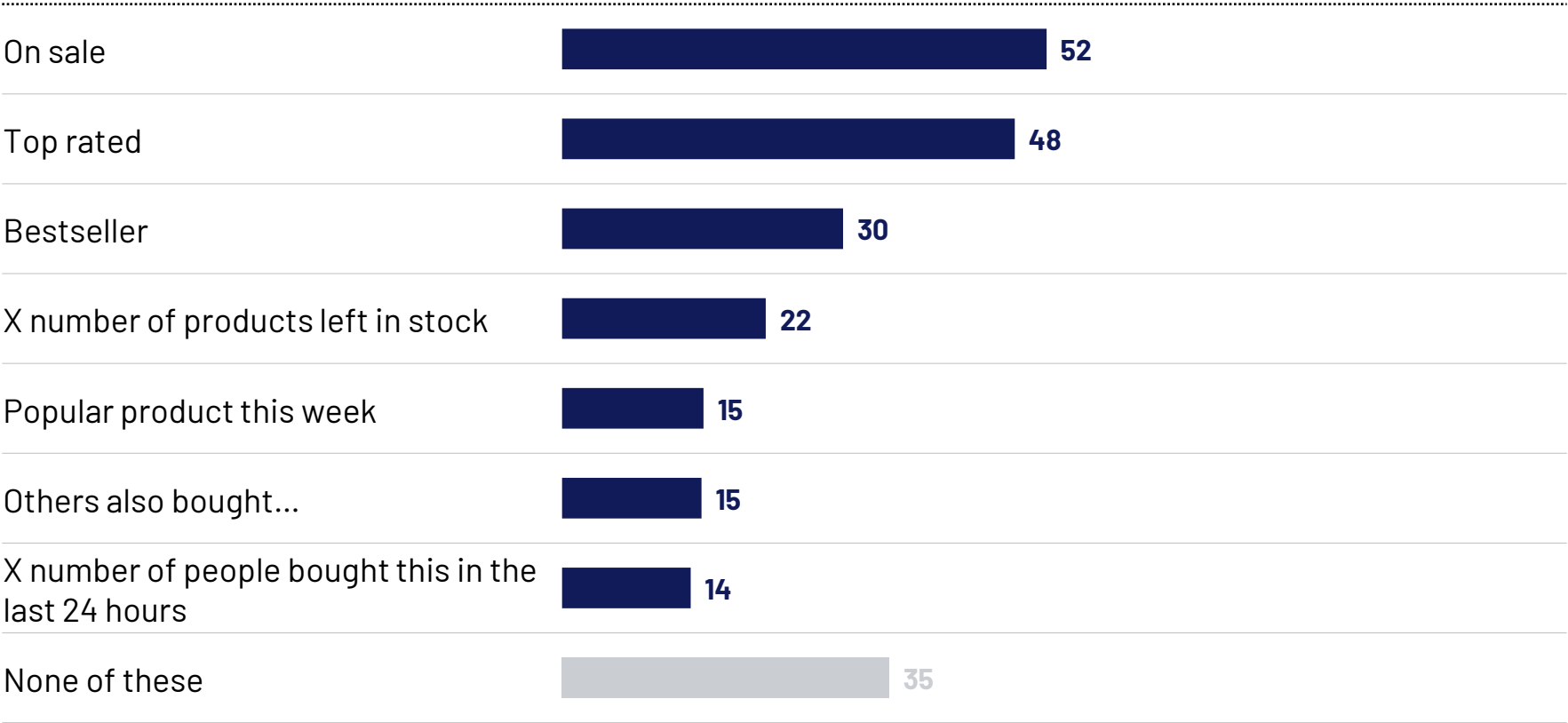
**New added questions in wave 2026*

Base: People who evaluated the innovation (n=396)
Question: I2c. How helpful do you find social proof when making online purchases? / I2d. In what situations would these reviews be useful to you?



WHAT MESSAGES WOULD ENCOURAGE SHOPPERS THE MOST TO VISIT A PRODUCT PAGE?

Most encouraging social proof communication would entail 'on sale' or 'top rated' messages. Messages containing information on the number of people who bought it seem to be of lower interest.



**New added question in wave 2026*

Base: People who evaluated the innovation (n=396)
Question: 12e. Which messages would most encourage you to visit a product page?

Top 3 percentage is reported.

HOW DO SHOPPERS FEEL ABOUT SOCIAL PROOF?

Just like Belgian’s skepticism about trusting messages from online shops on stock info, they are suspicious when it comes to social proof supporting them in better and faster product choices.

I believe that social proof is **based on real data**



Social proof can **help** me **make** a **better** product **choice**



Social proof can **help** me **make** a **faster** product **choice**



Social proof notifications are **disturbing** when shopping online



- Do not agree at all
- Rather disagree
- Rather agree
- Fully agree

**New added question in wave 2026*

Base: People who evaluated the innovation (n=396)
Question: 12f. Now evaluate the following statements.

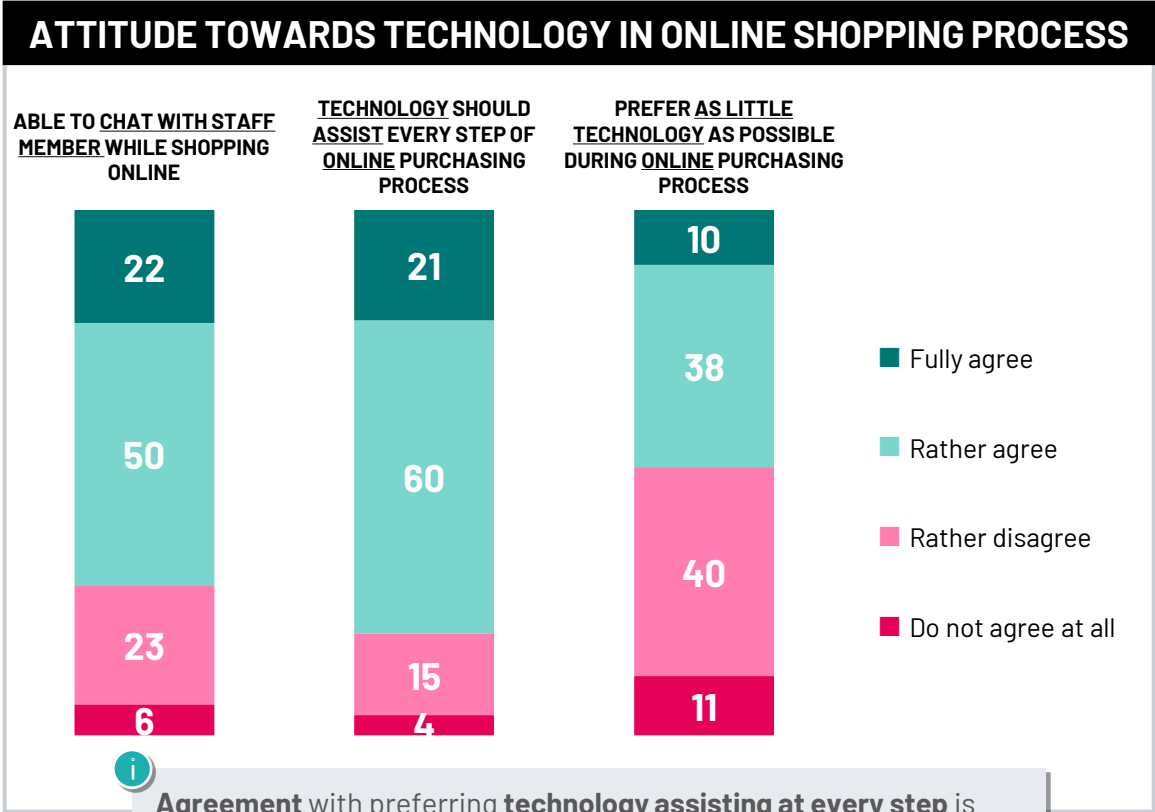
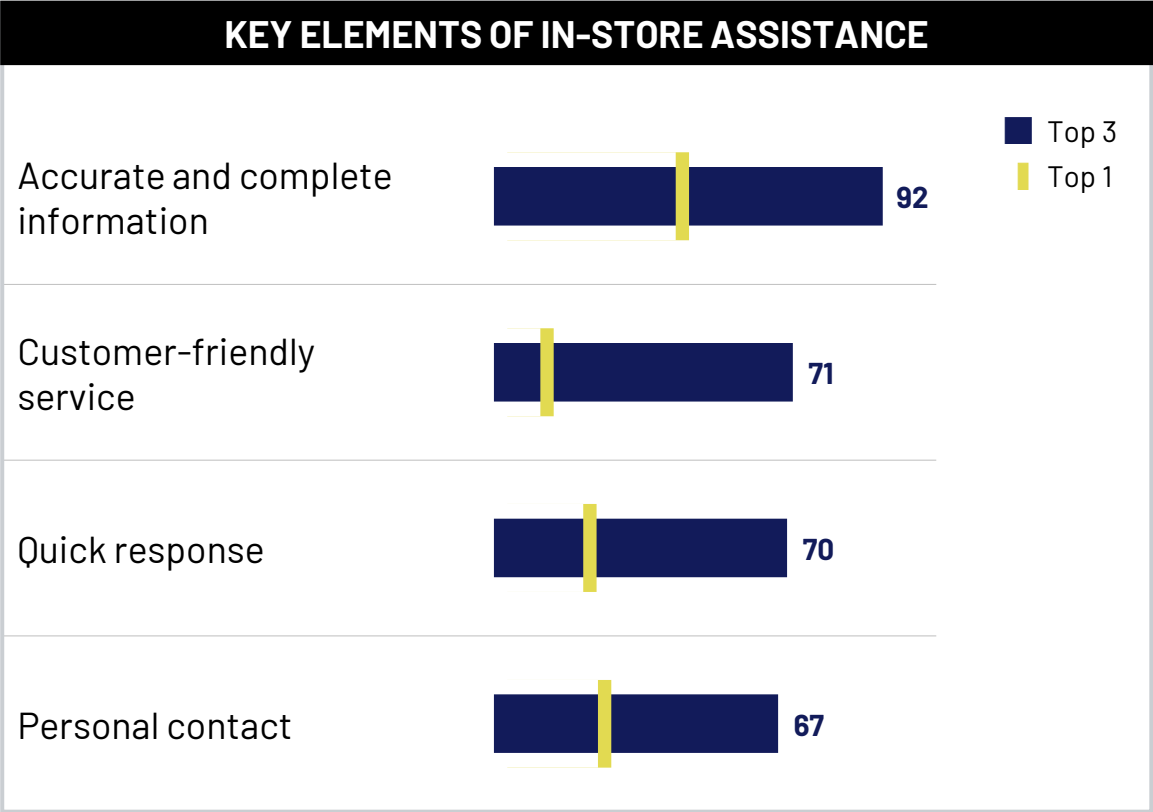
BUYING VIA WHATSAPP

CONCEPT 3



WHAT DO SHOPPERS FIND IMPORTANT IN TERMS OF ASSISTANCE IN THE (ONLINE) PURCHASING PROCESS?

Accurate and complete information is the most important element by far in terms of assistance. 4 in 5 feel technology should be able to assist during every step in the online purchasing process.



i *New added questions in wave 2026

Base: Total sample (n=2010)
Question: Q79. Take a moment to think about interacting with the store. What do you consider important when asking a store employee for help?
Q80. Evaluate the following statements.

i Agreement with preferring technology assisting at every step is lowest among shoppers from Flanders and the 55+ age group. The latter also more often agree to prefer minimal use of technology.

BUYING VIA WHATSAPP

Shop directly with a brand via a WhatsApp chat.

You can browse products in a catalog, add them to your shopping cart, place your order, and pay securely—all within WhatsApp through a chat with the brand. You can also ask for advice or contact customer service representatives directly in the chat.



Making purchases through the seller's/online store's official WhatsApp channel



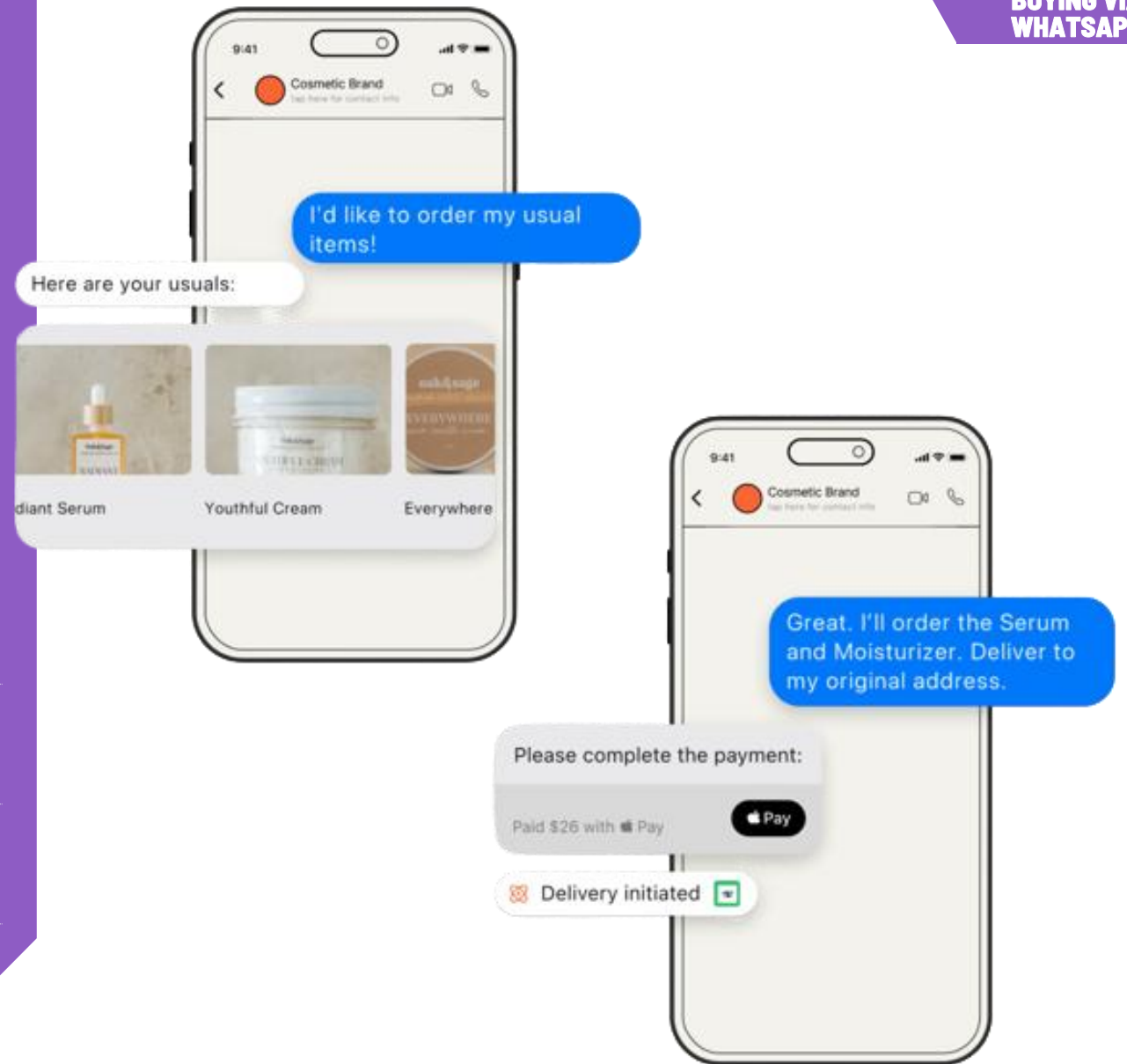
Products can be viewed in a catalog that lists prices



Terms and conditions for delivery and returns are the same as those for an online store



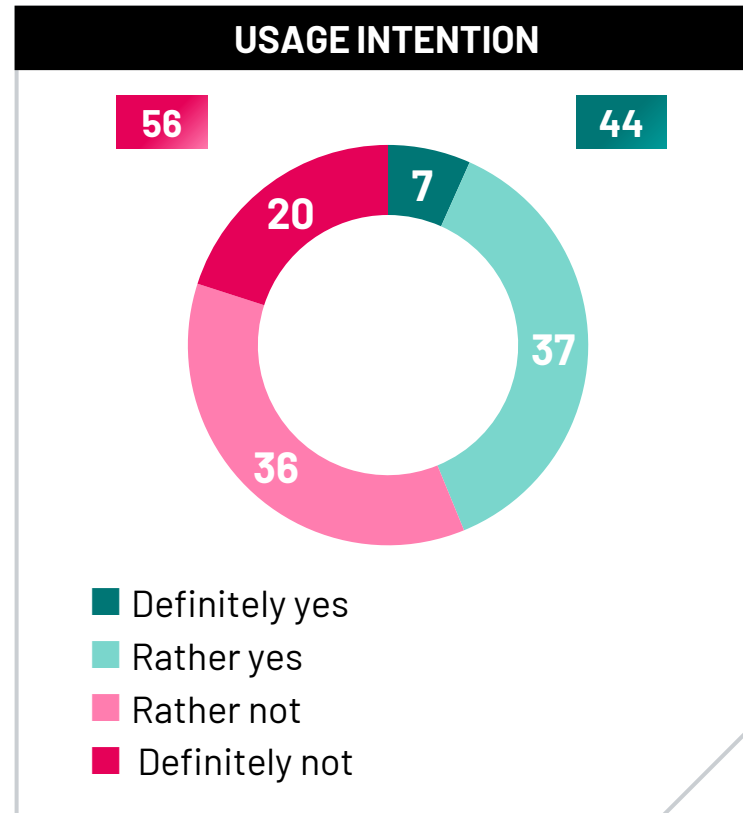
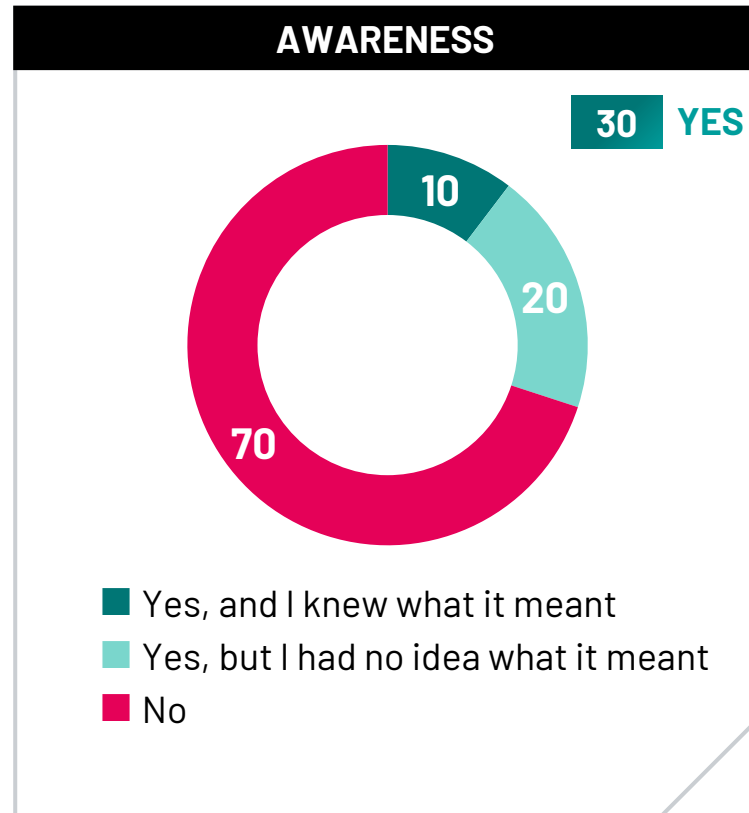
You can contact a representative or department directly with any questions or for advice



BUYING VIA
WHATSAPP

TO WHAT EXTENT ARE SHOPPERS AWARE OF THE OPTION TO PURCHASE PRODUCTS VIA WHATSAPP, AND HOW LIKELY ARE THEY TO USE IT?

A limited share (30%) has some idea about buying via WhatsApp. After explaining, over 2 in 5 would be interested to use it.



i *New added questions in wave 2026

Base: People who evaluated the innovation (n=401)

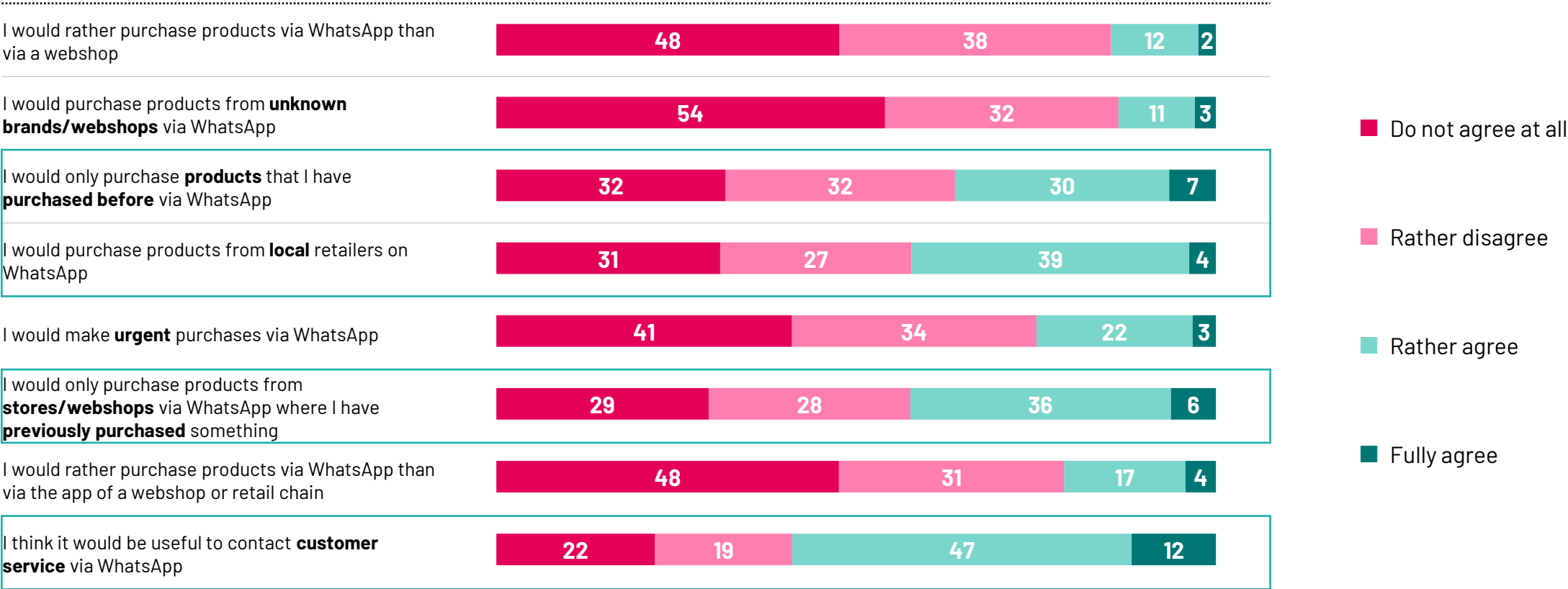
Question: I4a. Had you heard of this option before? / I4b. If this were available on an online store where you shop regularly, would you use it?



Awareness and usage intention are highest among the 18-24 age group.

HOW DO SHOPPERS FEEL ABOUT BUYING PRODUCTS VIA WHATSAPP?

Shoppers are **hesitant** to use WhatsApp for purchases, showing a strong preference for other purchase methods like webshops. The platform is, on the other hand, viewed more **favorably** for **customer service interactions** and for purchasing from familiar, local retailers, rather than for new buys.



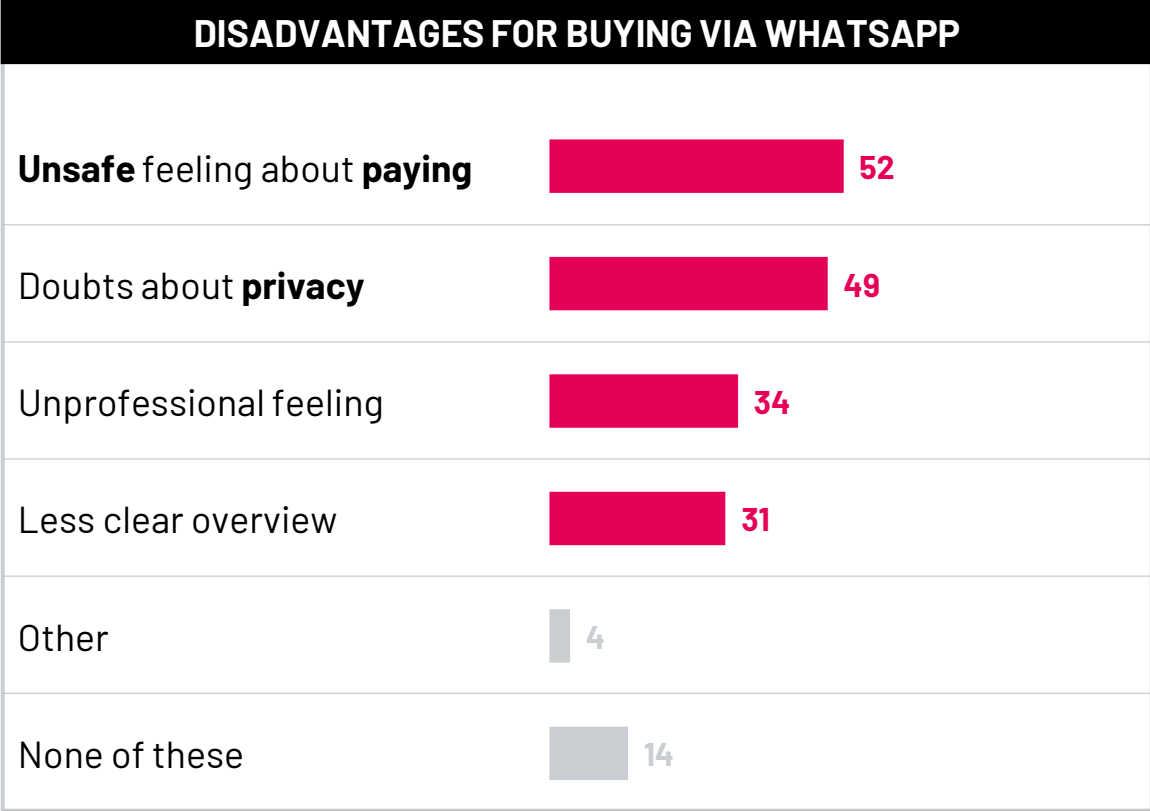
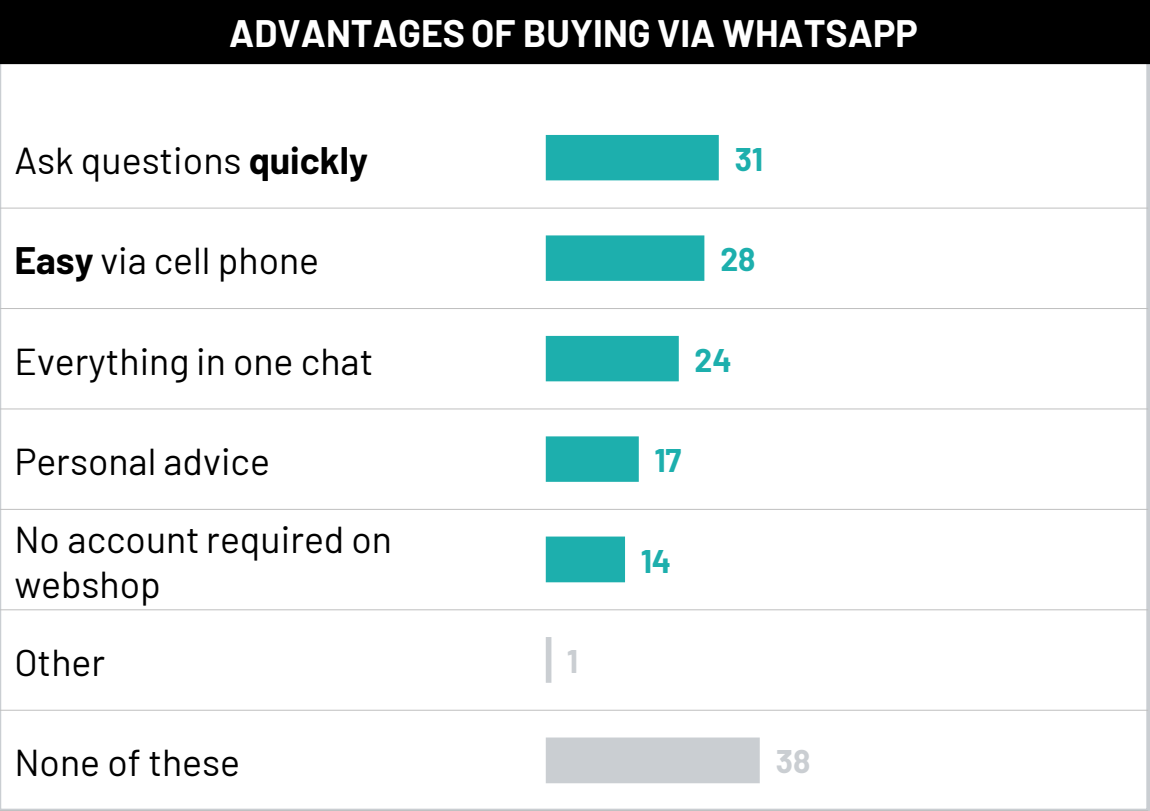
i *New added question in wave 2026

Base: People who evaluated the innovation (n=401)
Question: I4c. Now evaluate the following statements.

i The top categories considered for WhatsApp purchasing are books, fashion, and leisure (each by +-10% of respondents who evaluated the concept).

WHAT (DIS)ADVANTAGES DO SHOPPERS ASSOCIATE WITH SHOPPING VIA WHATSAPP?

Speed of asking questions and **convenience** through their mobile are perceived as most beneficial, but **privacy concerns** can hinder adoption as over half mentions doubts or unsafe feelings about it.

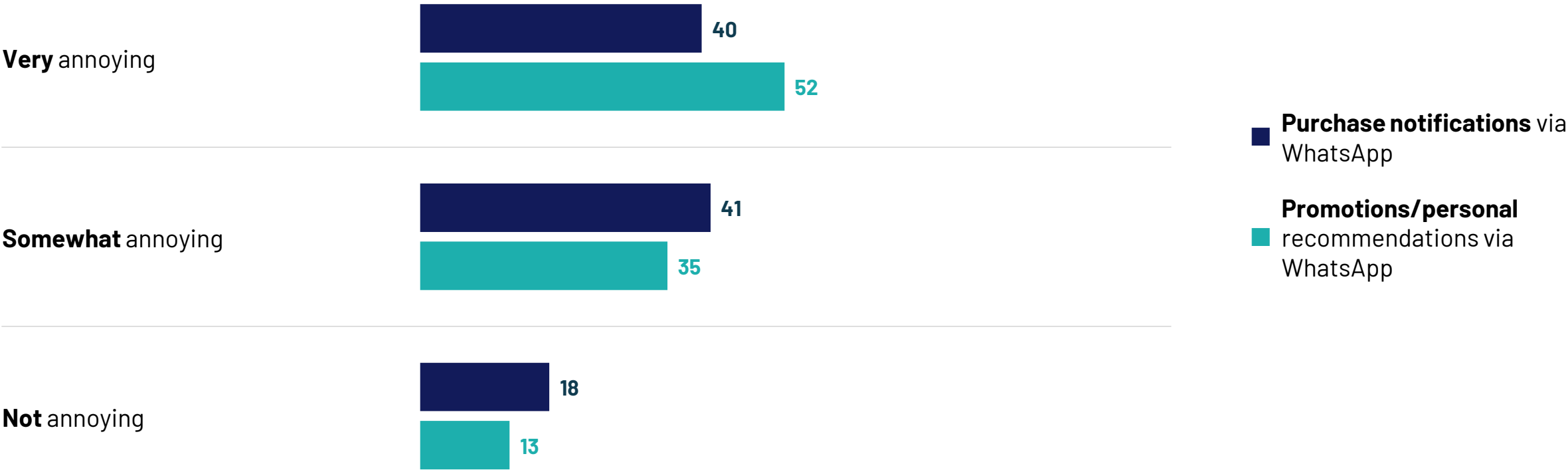


**New added questions in wave 2026*

Base: People who evaluated the innovation (n=401)
 Question: 14e. What do you think are the advantages of shopping via WhatsApp? / 14f. And what do you think are the disadvantages of shopping via WhatsApp?

HOW ANNOYING DO SHOPPERS FIND CERTAIN MESSAGES VIA WHATSAPP?

Over 4 in 5 find communication through WhatsApp (somewhat) annoying. Especially promotions and general recommendations can spark these feelings, but also purchase notifications form a watch out.



Base: People who evaluated the innovation (n=401)
 Question: I4g. How annoying would you find it if purchase notifications appeared among your private messages on WhatsApp? /
 I4h. And how annoying would you find it to receive promotions or personalized recommendations on a regular basis via WhatsApp?

HEADSETS

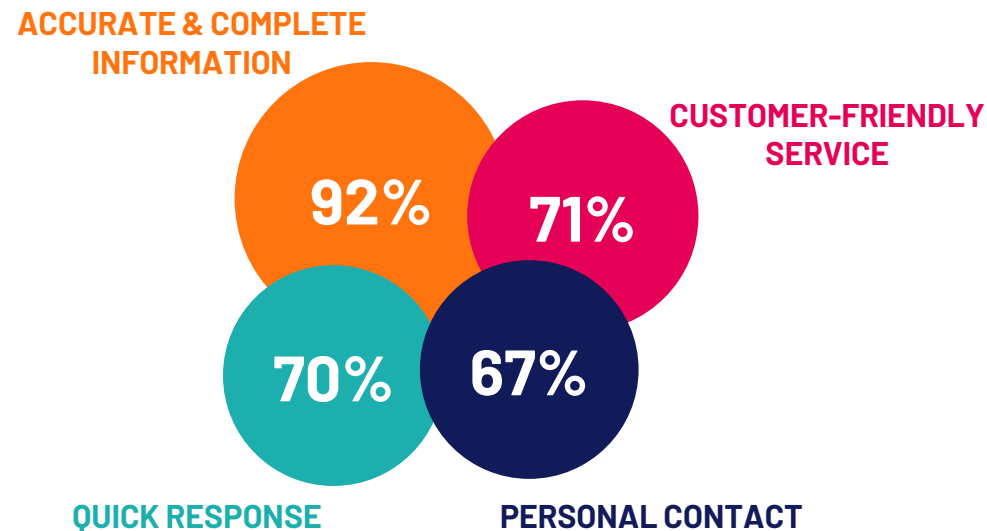
CONCEPT 4



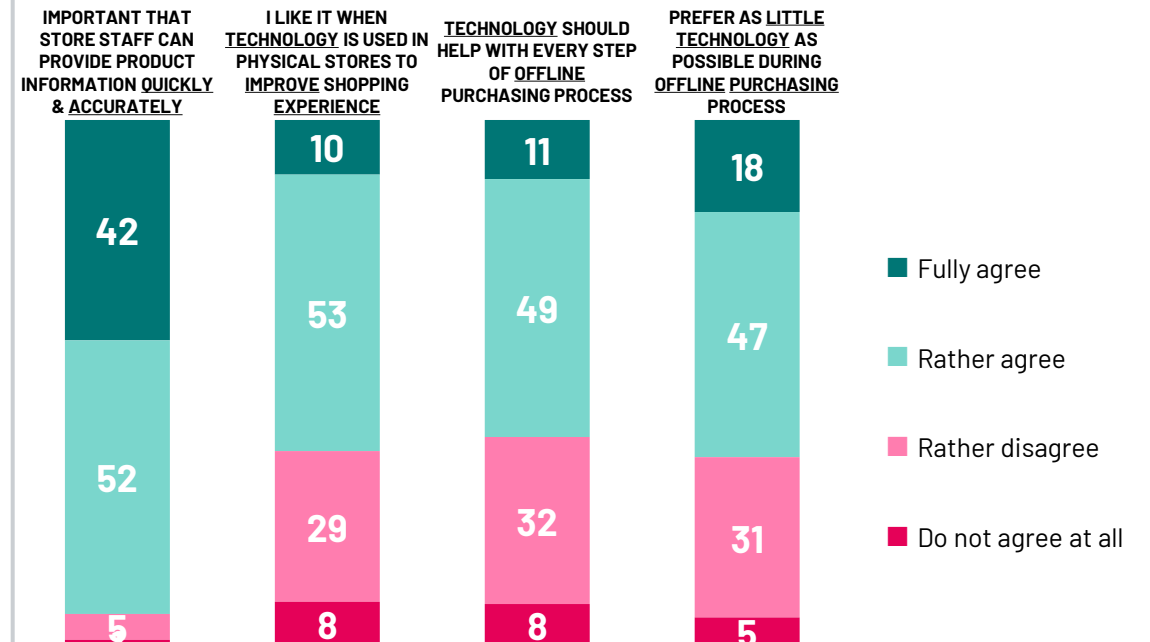
WHAT DO SHOPPERS FIND IMPORTANT IN THE OFFLINE PURCHASING PROCESS?

For shoppers interacting with a store, the top priority is that staff can provide accurate and complete product information. While speed and friendliness are also important, the ability of an employee to deliver correct information is by far the most critical element of in-store assistance.

KEY ELEMENTS OF (IN-STORE) ASSISTANCE



ATTITUDE TOWARDS TECHNOLOGY IN OFFLINE SHOPPING PROCESS



i *New added questions in wave 2026

Base: Total sample (n=2010)

Question: Q79. Take a moment to think about interacting with the store. What do you consider important when asking a store employee for help? / Q80. Evaluate the following statements.

i Top 3 percentage is reported.

HEADSETS

Store associates wear a discreet headset that allows them to communicate directly with colleagues or information systems while assisting you. If you have a question about inventory, sizes, or product information, the associate can advise you right away. They ask questions and receive immediate answers through their headset (which may be supported by AI).



Confidential: communication is limited to employees only



Quick access to product information & comparisons



Less waiting: you'll get answers to your questions faster thanks to quick access to product information and comparisons

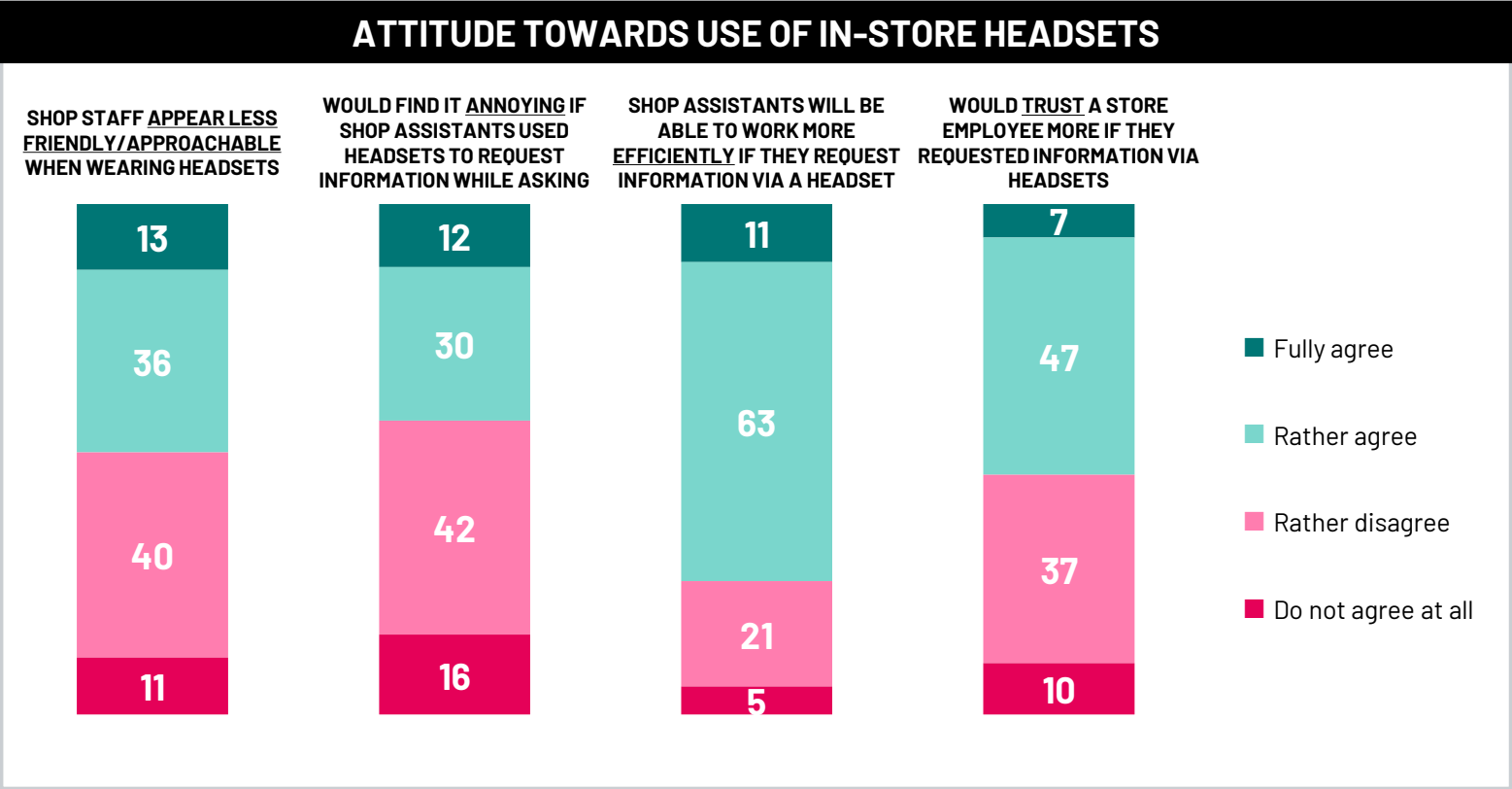
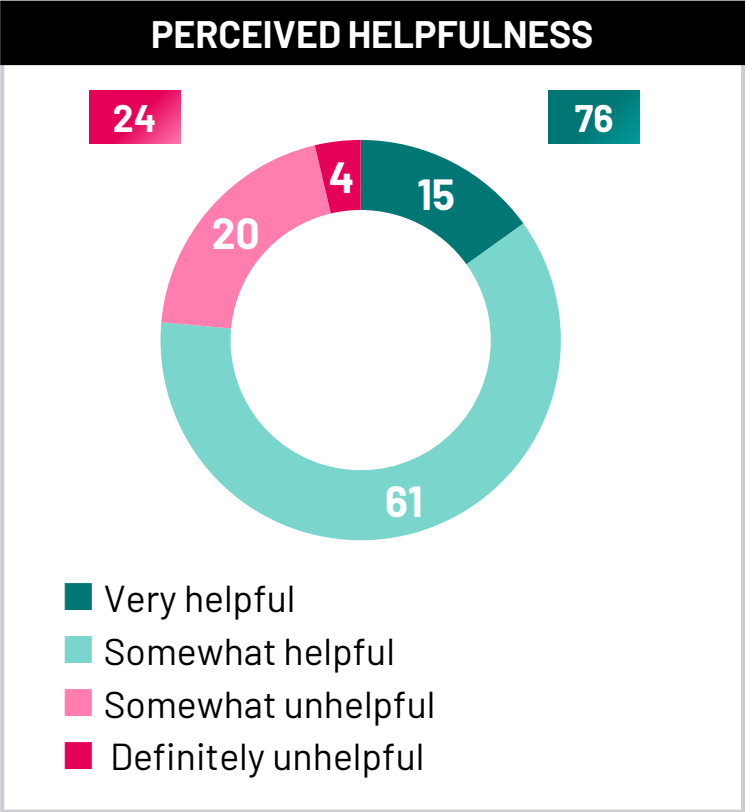


Personal contact: the staff member stays with you and is always available to assist you



HOW DO SHOPPERS FEEL ABOUT SHOP ASSISTANTS WEARING AND USING HEADSETS?

3 in 4 feel the headsets for store employees would be helpful to them as a customer. They are convinced of the efficiency, yet doubts arise around trust and approachability of the staff.

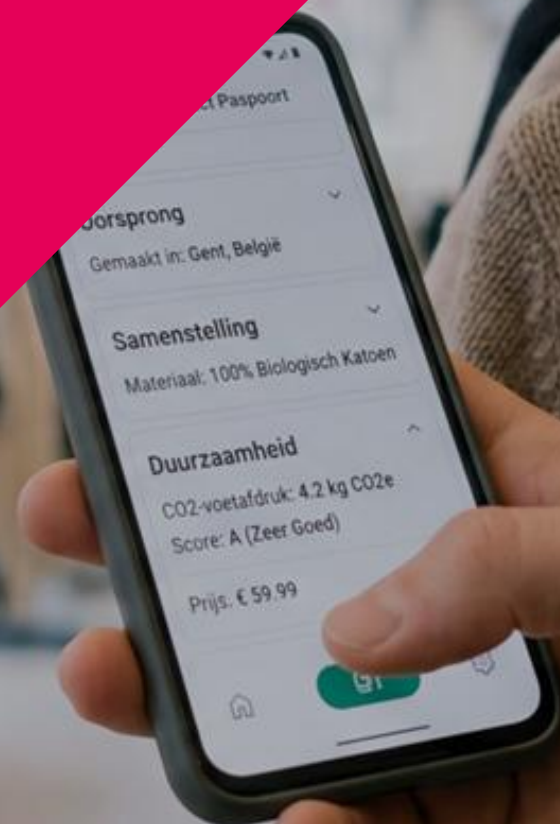


**New added questions in wave 2026*

Base: People who evaluated the innovation (n=405)
Question: I5a. How helpful do these headsets for store employees seem to you as a customer? / I5b. Now evaluate the following statements.

DIGITAL PRODUCT PASSPORT

CONCEPT 5



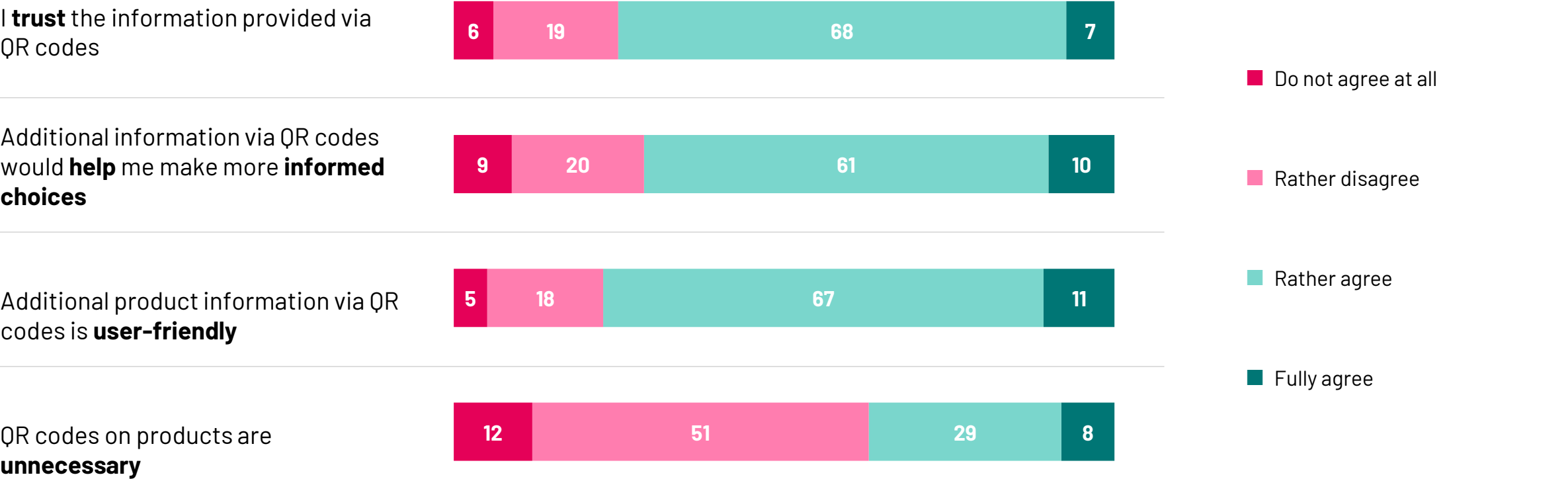
DIGITAL PRODUCT PASSPORT

Scan a QR code for products in-store or online using your smartphone. A user-friendly tool instantly displays the key information from the product's digital passport: the product's origin, composition, sustainability, usage, and recyclability, among other details. This provides greater transparency about a product and allows you to make more informed choices when both purchasing and disposing of it.



HOW DO SHOPPERS FEEL ABOUT A QR CODE CONTAINING EXTRA PRODUCT INFORMATION?

Belgian online shoppers are receptive towards QR codes for more information. The majority would trust the information, is convinced it would help make informed choices and perceives it user friendly.

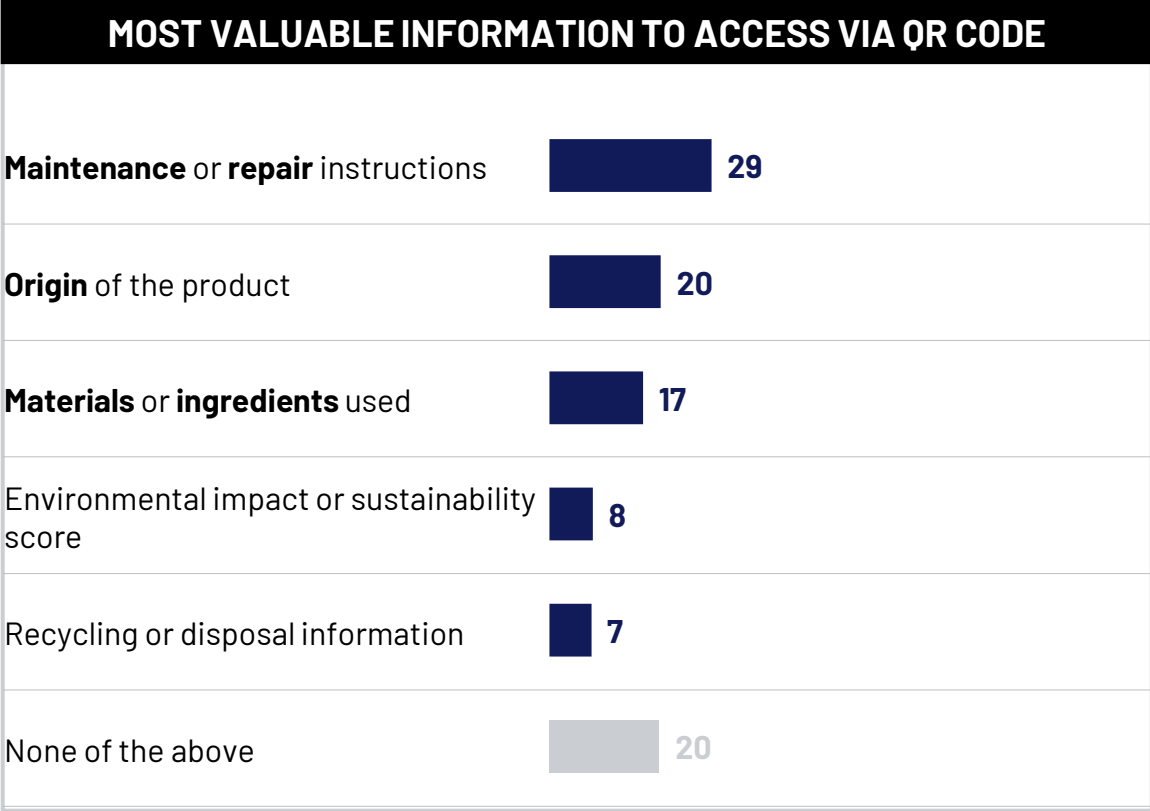
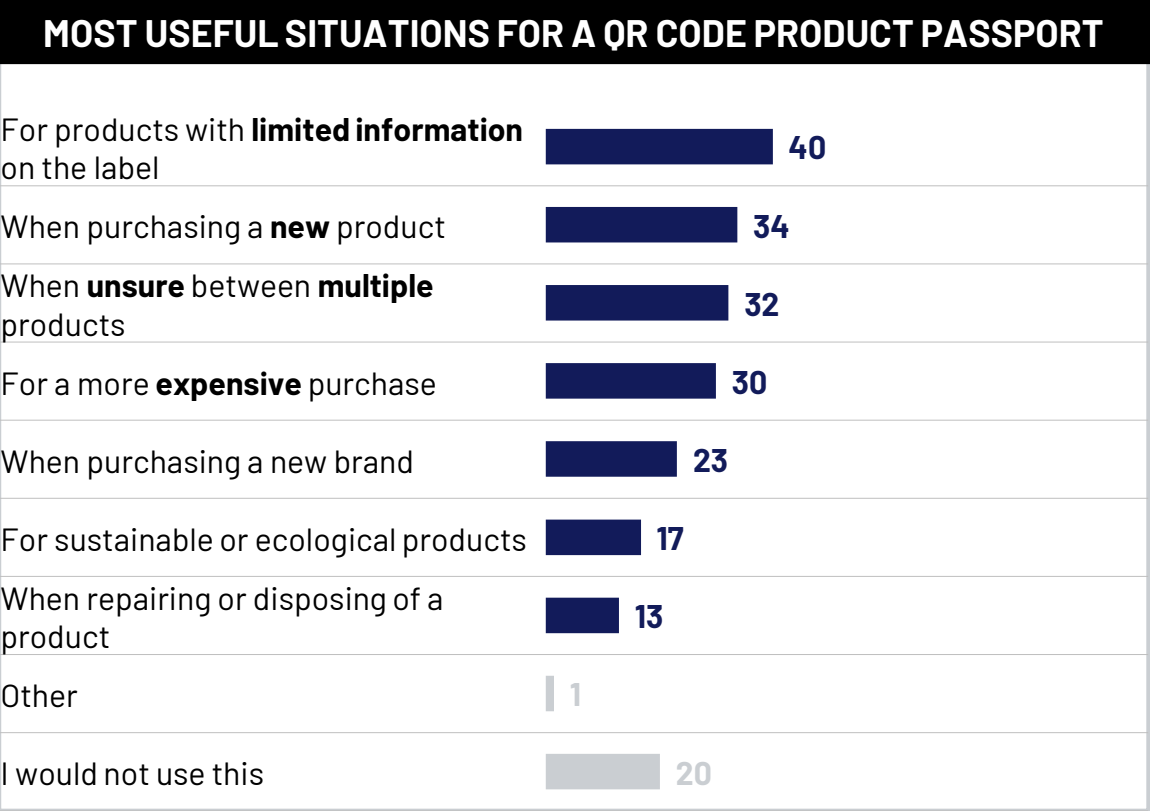


**New added question in wave 2026*

Base: People who evaluated the innovation (n=405)
 Question: I6c. Now evaluate the following statements.

IN WHAT SITUATIONS IS A QR CODE WITH ADDITIONAL PRODUCT INFORMATION MOST USEFUL AND WHAT EXTRA INFORMATION IS MOST VALUABLE?

A QR code is deemed most useful for products with limited info on the label, for new products or to compare between multiple products. Information that should be accessible should focus on maintenance, origin and materials used.



 *New added questions in wave 2026

Base: People who evaluated the innovation (n=405)
Question: I6a. In what situations would a QR code containing additional product information be useful to you? / I6b. What types of information would most encourage you to scan a QR code?

MORE INFORMATION?



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