

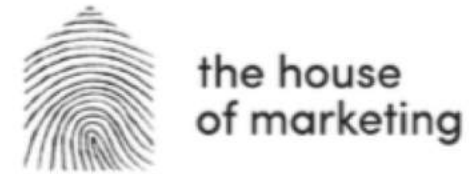


SafeShops.be

The Belgian Online Shopper Research 2019



Thanks to these partners!





The research

Why and how?



01 The research How?

- Develop and share real insights into online shopping
- Support Safeshops Awards with objective screening of webshops
- Awards by shoppers, not “industry experts”
- Equal chance for all to win



01 The research

How?

W – WHAT

- A quantitative study by means of an online questionnaire.

W – WHO

- A national representative sample of Belgians (N=416).
- Representative in terms of gender, age and region.

W – WHY

- To measure attitudes and quantify shopping motivations
- To screen and score webshops





Which parameters determine webshop scores?

LOGISTICS	<ol style="list-style-type: none">1. Low to no delivery costs (*)2. Reliability and speed of delivery (*)3. Free insurance transport and / or loss (*)4. Delivery options (at home, pick up point, ...) (*)5. Simple and flexible return policy (*)6. Low to no service costs (**)7. Clarity of download procedures of tickets & vouchers (**)8. Clear information about event or ticket (**)
CLIENT SERVICE	<ol style="list-style-type: none">1. Accessibility customer service (opening hours and channels)2. Expertise customer service3. Friendly and quick service4. Quality of FAQ
PAYMENT / CONTRACTING	<ol style="list-style-type: none">1. Clarity of prices and costs (eg. Transport costs, extra costs for alternative payment options, ...)2. Userfriendliness payment3. Number of payment options4. Additional measures to guarantee safety of payment (eg. 3D secure, MobilePay via bank app)5. Possibility to save payment details (eg. for later purchases)
CONCEPT	<ol style="list-style-type: none">1. Beautiful design2. Userfriendliness website (clear, search engine, filters, ...)3. Amount of product information4. Clear pictures5. Clear & relevant video6. Sharp prices7. Fun promotions and actions8. Mobile friendly9. Wide assortment10. Has quality labels11. Offers inspiration12. Positive reviews

* Not for shops selling intangibles (e.g. travel)

** Not for shops selling physical products

02.

Sample description

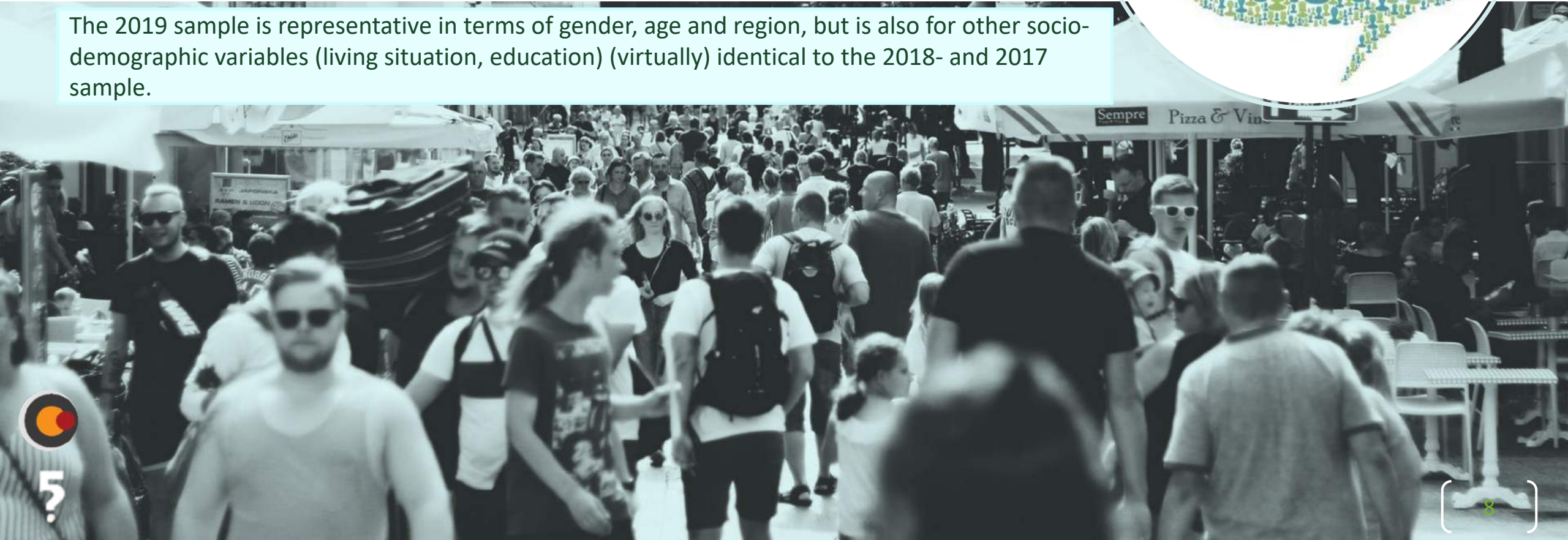
02 Sample description

National representative sample

416

Belgians participated in this study, vs. 415 in 2018

The 2019 sample is representative in terms of gender, age and region, but is also for other socio-demographic variables (living situation, education) (virtually) identical to the 2018- and 2017 sample.



02 Sample description

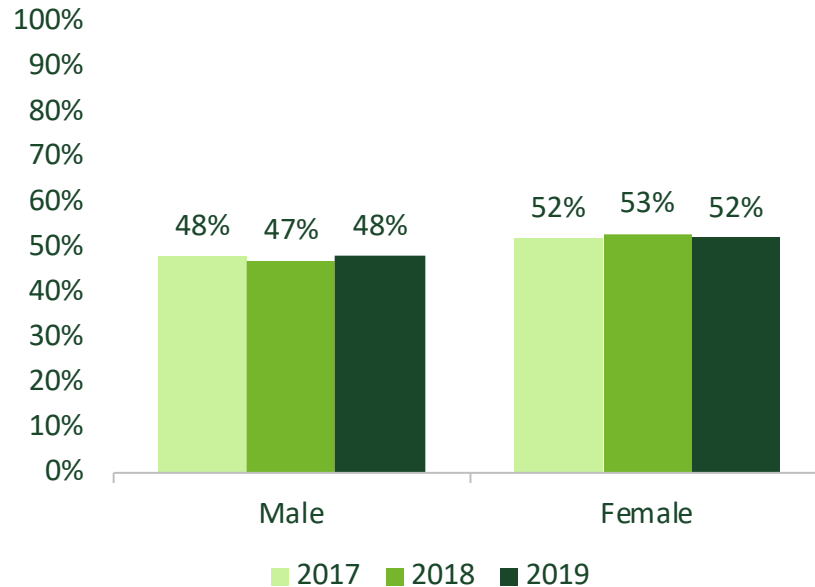
National representative sample

416

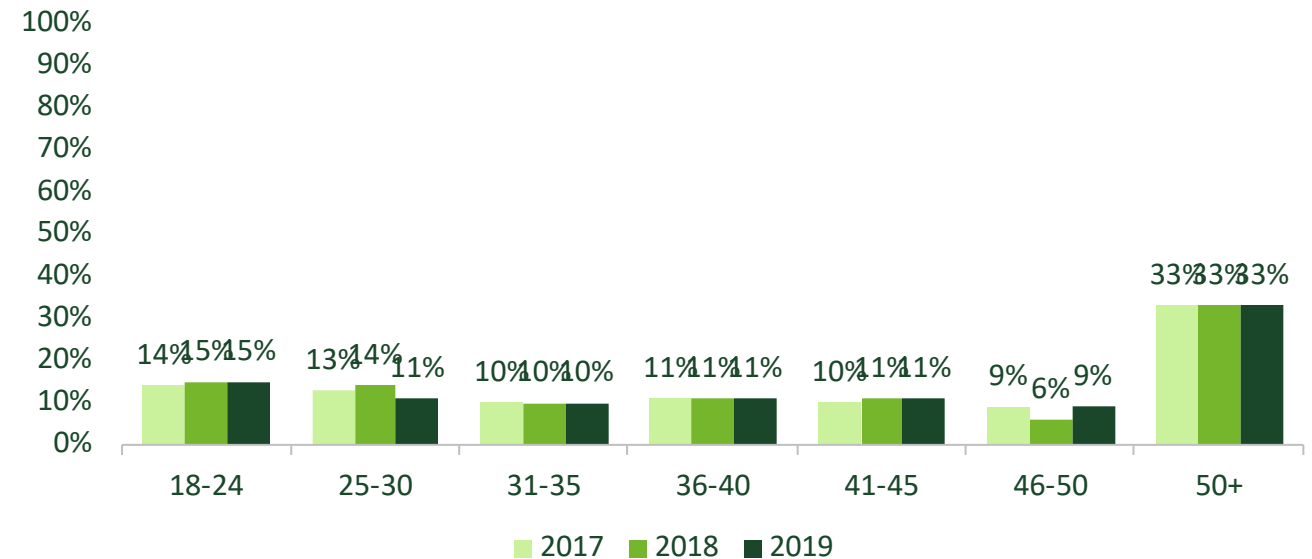
Belgians participated in this study, vs. 415 in 2018



Gender



Age



S1. You are...? – S2. What age are you?

Base: total samples 2017 (N=522) 2018 (N=415) 2019 (N=416)

▲ Significantly higher/lower
▼ compared to 2018 (c.i. 95%)

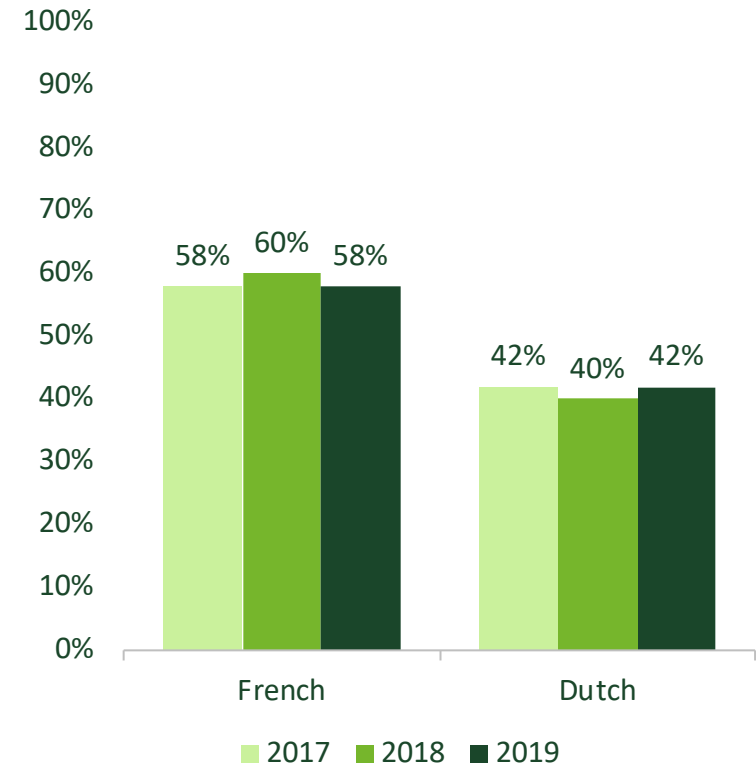
02

Sample description

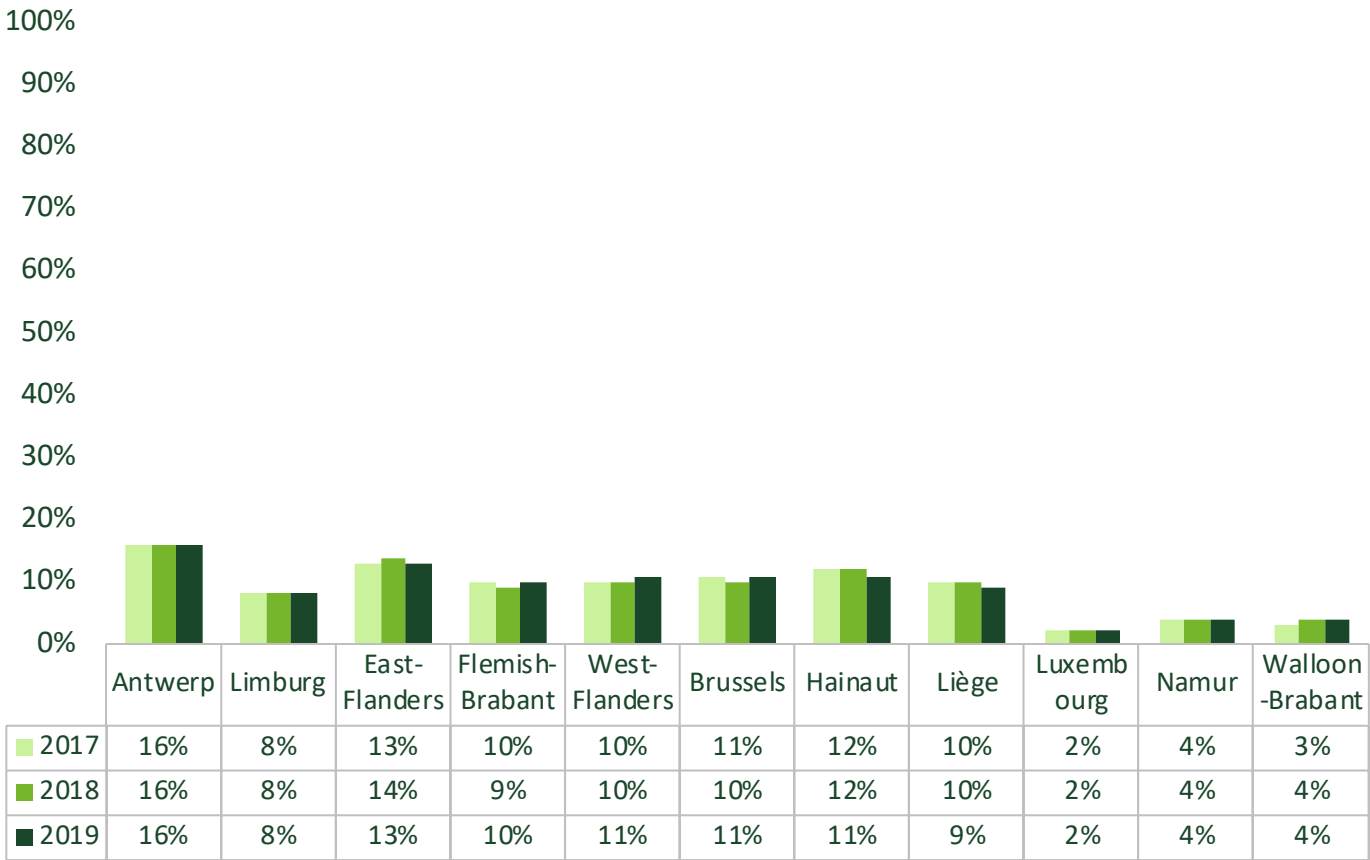
National representative sample



Language



Region



S3. What is your postal code?
Base: total samples 2017 (N=522), 2018 (N=415) and 2019 (N=416)

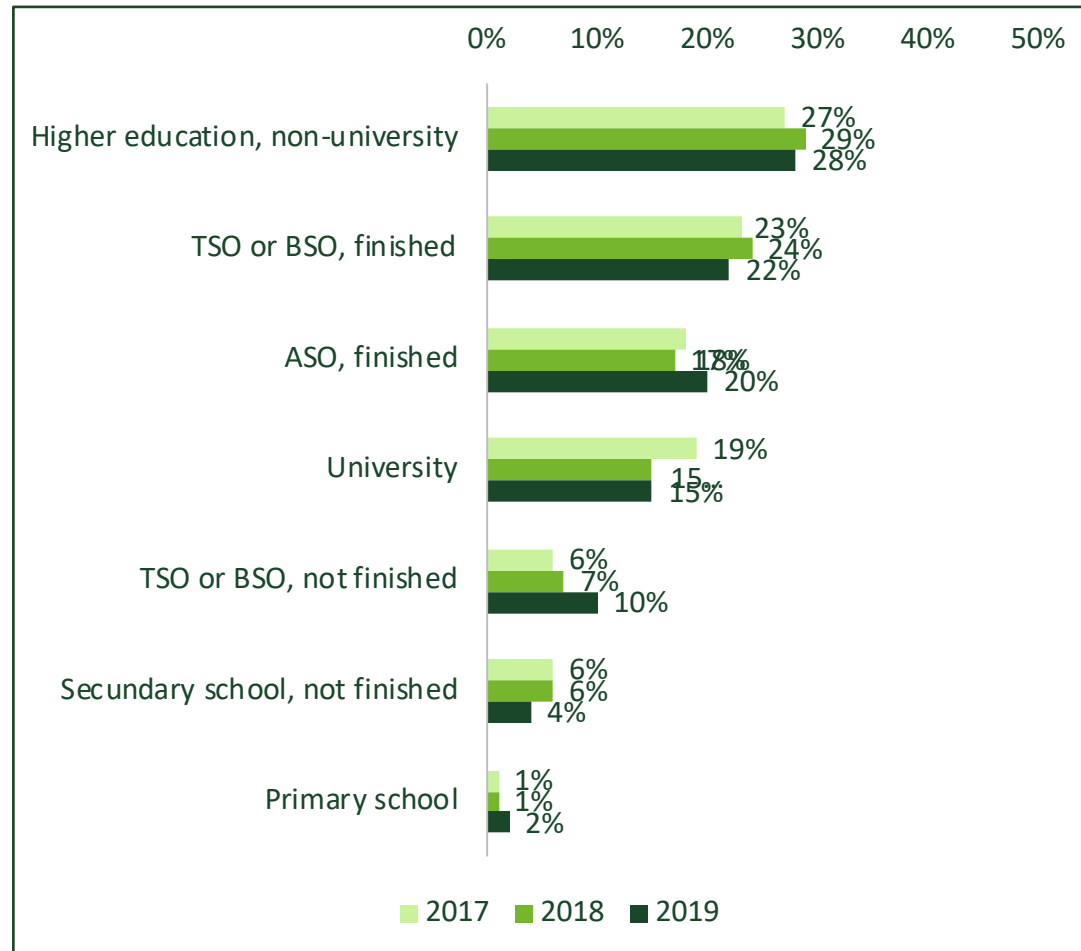
▲ Significantly higher/lower
▼ compared to 2018 (c.i. 95%)

02 Sample description

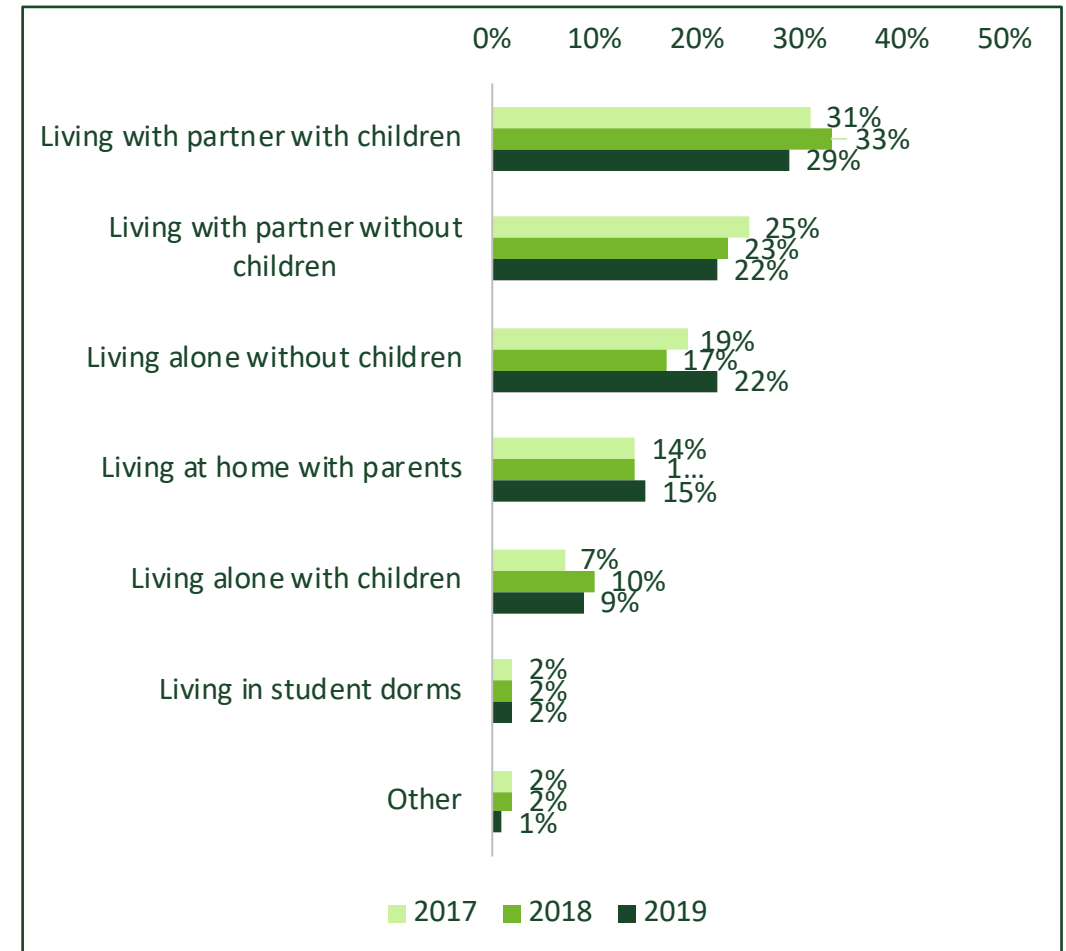
National representative sample



Education



Living situation



Q4.1 How would you best describe your living situation? Q4.4 what is your level of education?
Base: total samples 2017 (N=522), 2018 (N=415) and 2019 (N=416)

▲ Significantly higher/lower
▼ compared to 2018 (c.i. 95%)

03.

Online shopping habits

03 Online shopping habits

Frequency

1

The **frequency** of online shopping **continues to increase**. The group of Belgians who shop online less than monthly has significantly dropped compared to last year

2

The **scope** of online shopping is **getting wider and wider**. Online shopping frequency shows a general boost across product categories compared to 2018, both in well- and less established product categories

3

Yet, just as in 2018, the majority of the Belgians (64%) believe that their online shopping frequency won't change over the next year



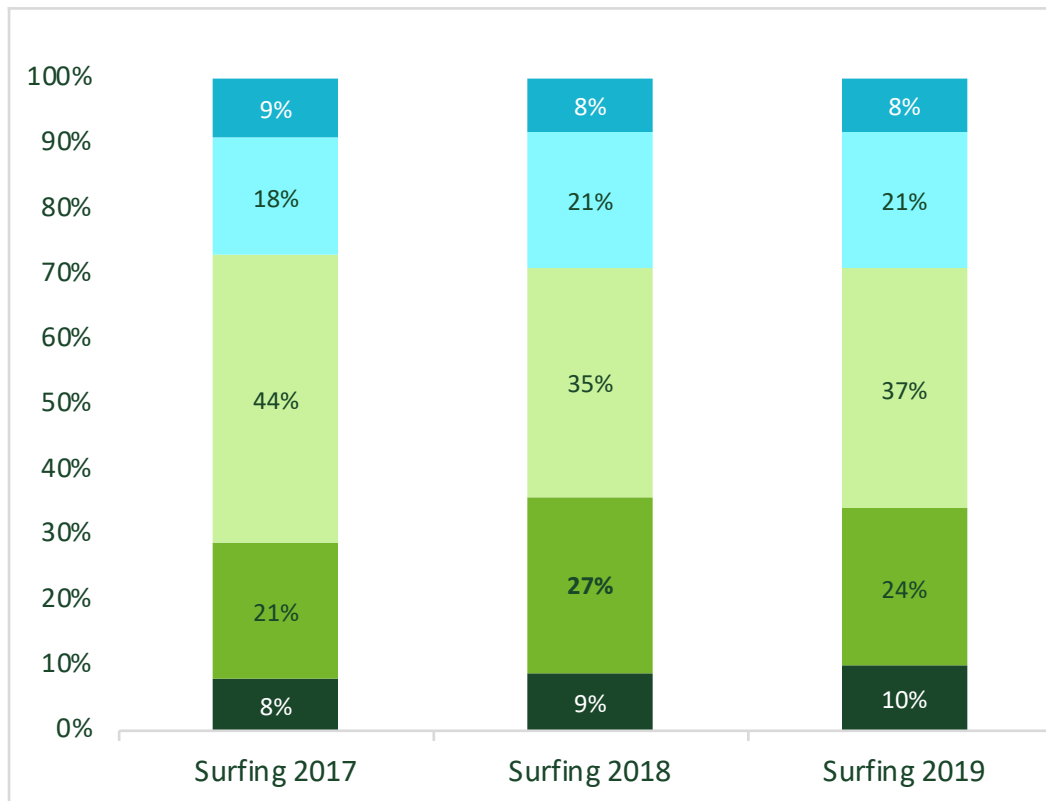
03 Online shopping habits

Frequency

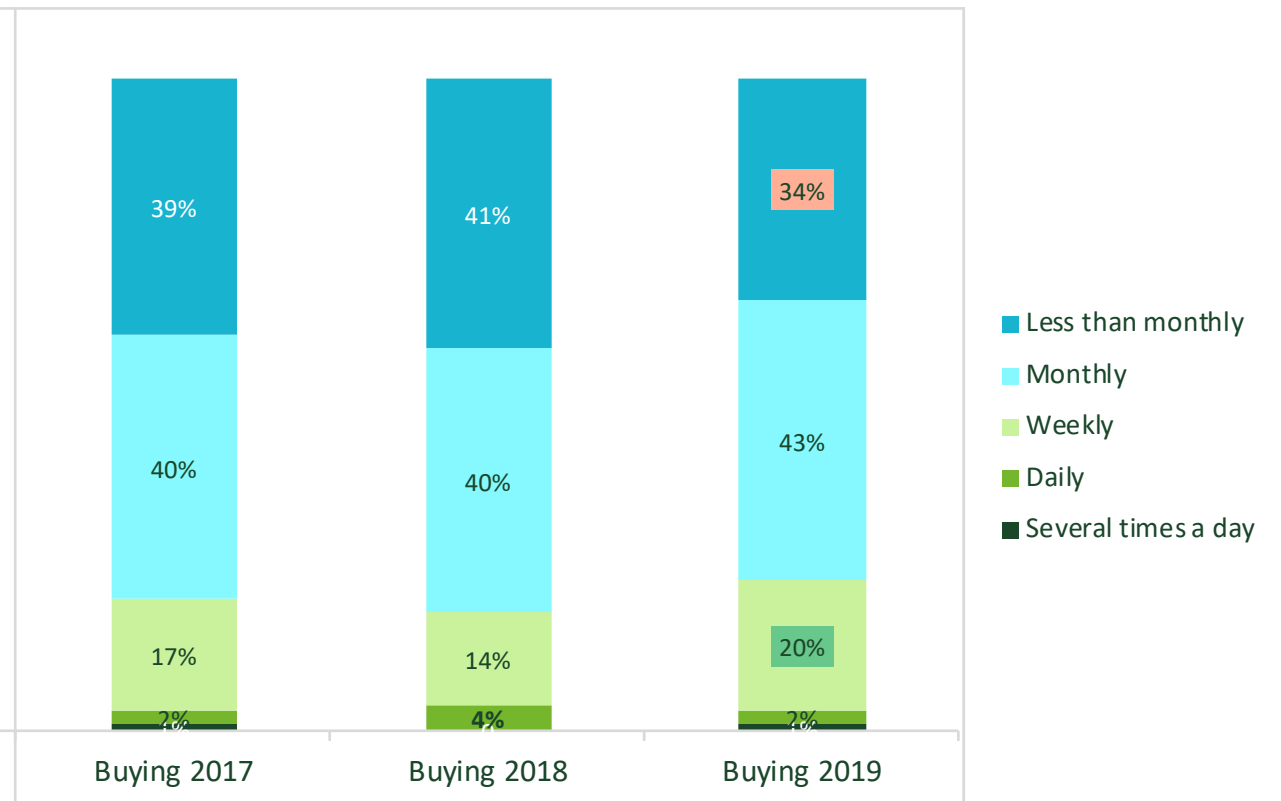
Number of people who regular buys online increases

The amount of people who shop online less than monthly has significantly dropped compared to 2018 (34% vs. 41%). Mainly the group of Belgians that buy online on a weekly basis has expanded since last year (20% vs. 14%).

How often do you visit webshops?



How often do you buy something online?



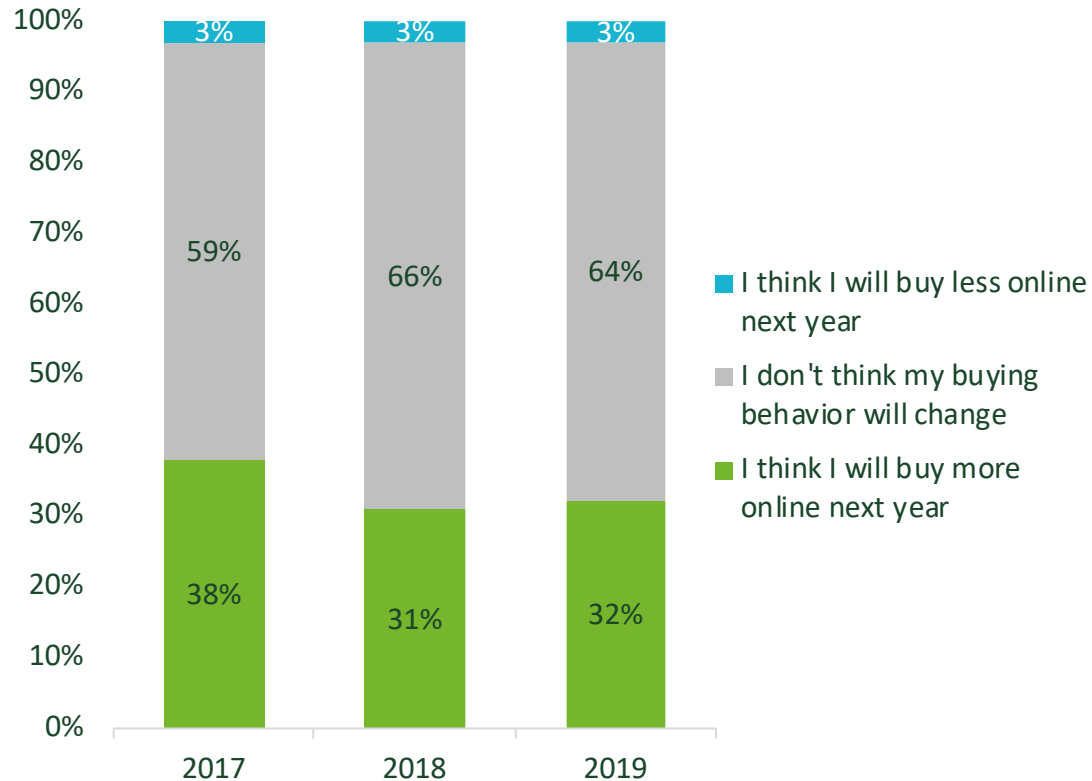
Q1.1 How often do you browse webshops? Q1.2 How often do you buy something online? (SR)
Base: total samples 2017 (N=522), 2018 (N=415) and 2019 (N=416)

▲ Significantly higher/lower compared to 2018 (c.i. 95%)
▼

03 Online shopping habits

Future behavior

It won't change – Like in 2018, the majority of the Belgians (64%) believes that their online shopping frequency won't change over the next year. 1 in 3 Belgians (32%) thinks that it will become more frequent in the future.



Q1.14 Do you think your online shopping habits will change over the next year? (SR)
Base: total samples 2017 (N=522), 2018 (N=415) and 2019 (N=416)



▲ Significantly higher/lower
▼ compared to 2018 (c.i. 95%)

03 Online shopping habits

Product categories

The scope of online shopping is getting wider compared to 2018

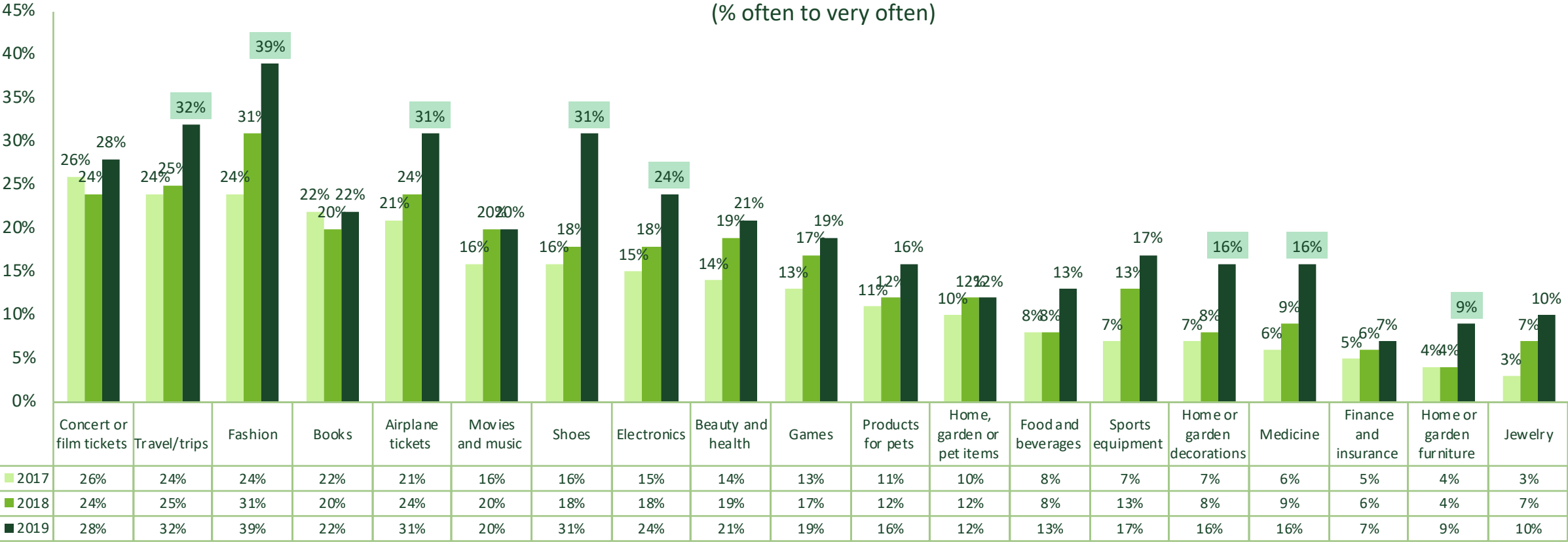
The frequency at which Belgians shop online in certain product categories shows a strong upward trend compared to just one year ago. This boost manifests itself both in established categories (travel, fashion, airplane, shoes) and in less established categories (home or garden decoration, medicine, food and beverages).

03 Online shopping habits

Product categories

Online shopping continues to grow, also in less established categories - Online shopping frequency is boosted in all these categories compared to 2018. We observe significant growth in both established categories (travel, fashion, airplane, shoes) and less established categories (home /garden decoration, medicine, food and beverages).

How often do you buy the following product categories online?
(% often to very often)



Q1.3 How often do you buy the following product categories? online Top 2 (Often to very often)
Base: total samples 2017 (N=522), 2018 (N=415) and 2019 (N=416)

▲ Significantly higher/lower compared to 2018 (c.i. 95%)
▼

03 Online shopping habits

Mobile shopping

1

Increased use of smartphone and tablet for online shopping purposes compared to 2018. Nonetheless, the laptop remains Belgians' dominant digital shopping device.

2

The majority of the Belgians who shop using their smartphone or tablet **prefer to browse to a webshop's website** instead of downloading the webshop's app.

3

The **Zalando app** has the **highest adoption** rate in Belgium, higher than other large e-commerce companies like Amazon, Ali Express and Bol.com.

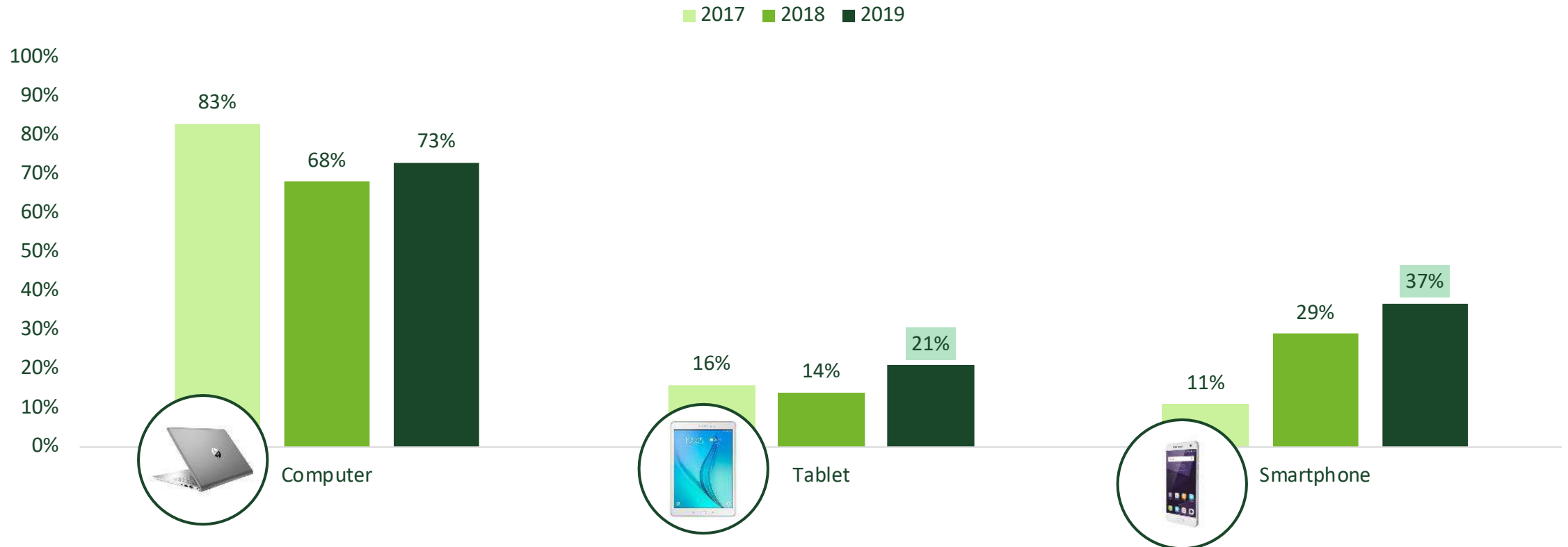


03 Online shopping habits

Devices

Increasing use of smartphone and tablet – The Belgian uses his smartphone or tablet more often to shop online compared to 2018. The regular use of the laptop remains stable.

Which device do you use when you shop online?
(% often to very often use)



Q1.5 What device do you usually use when shopping online? Top 2 (Often to very often)
Base: total samples 2017 (N=522), 2018 (N=415) and 2019 (N=416)

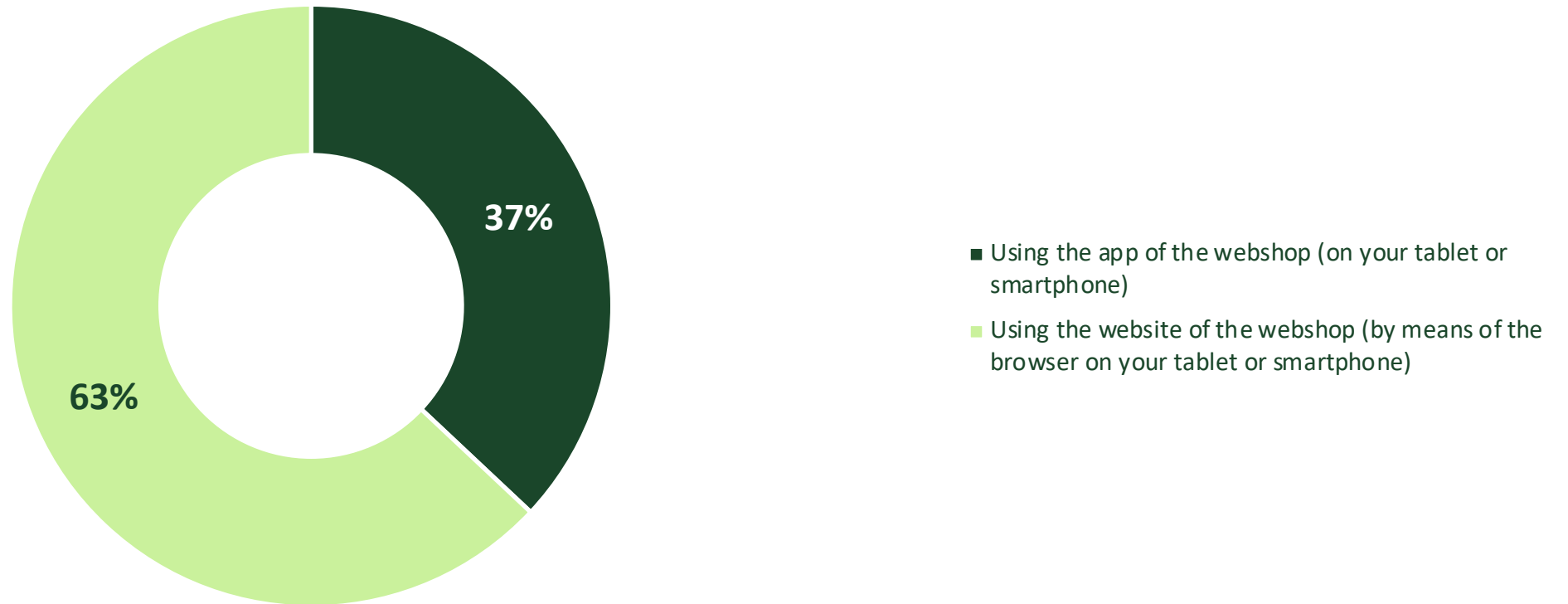
▲ Significantly higher/lower compared to 2018 (c.i. 95%)
▼

03 Online shopping habits

Mobile shopping

The majority of Belgians (63%) who shop with their mobile or tablet prefer to browse to the webshop's website instead of using the webshop's app. 37% would rather use the app of the webshop.

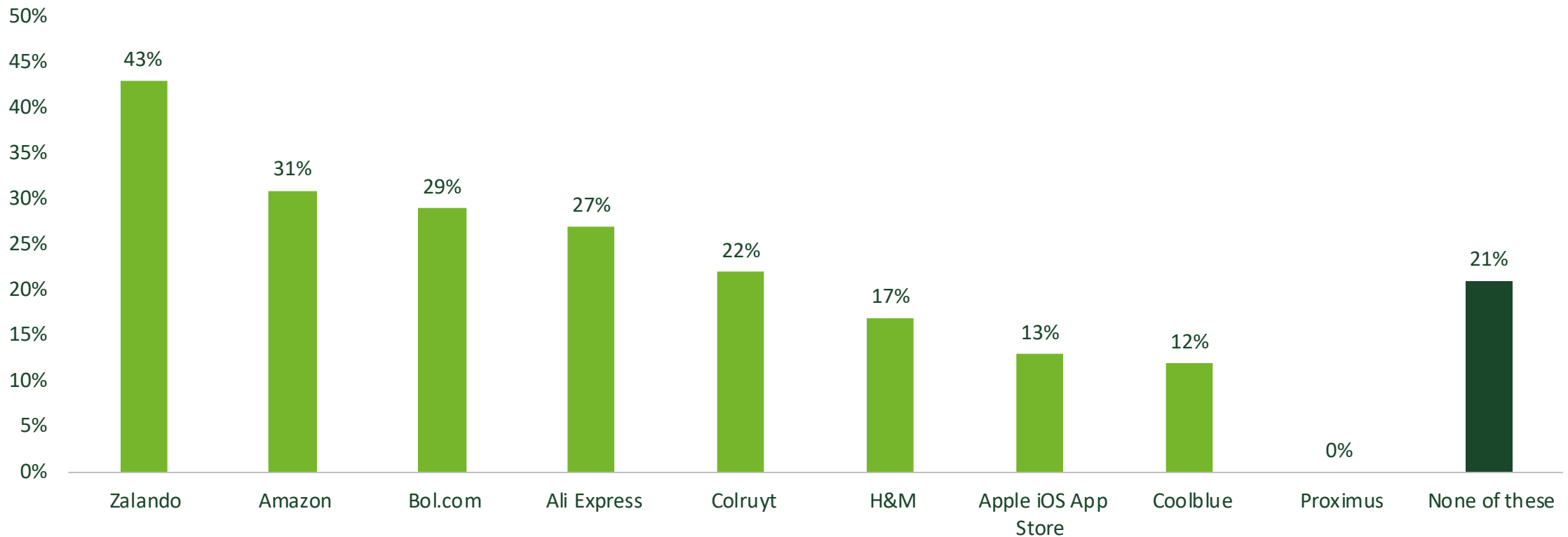
How do you prefer the shop online on your mobile?
(Filter: Belgians who shop online on their smartphone or tablet)



Mobile shopping

- **Zalando in the lead** - a lot of these Belgians have the Zalando app installed on their mobile phone or tablet (43%). Other brands with a relative strong penetration are e-commerce companies Amazon (31%), Bol.com (29%) and Ali Express (27%).
- **None of these** – 1 in 5 (21%) has none of these apps

From which of these webshops have you downloaded an app?
(Filter: Belgians who shop online on their smartphone or tablet)



03 Online shopping habits

Delivery and Pay

1

Just as in 2018, **home delivery** or delivery at an address of choice remains the **most popular** (76%)

2

Just as in 2018, most Belgians still prefer to choose their **delivery method based on the type of product** they ordered.

3

There is **no clear preference** in terms of **payment method**, every seems to have his/her own favorite
That said, PayPal is the most popular online payment method in Belgium.



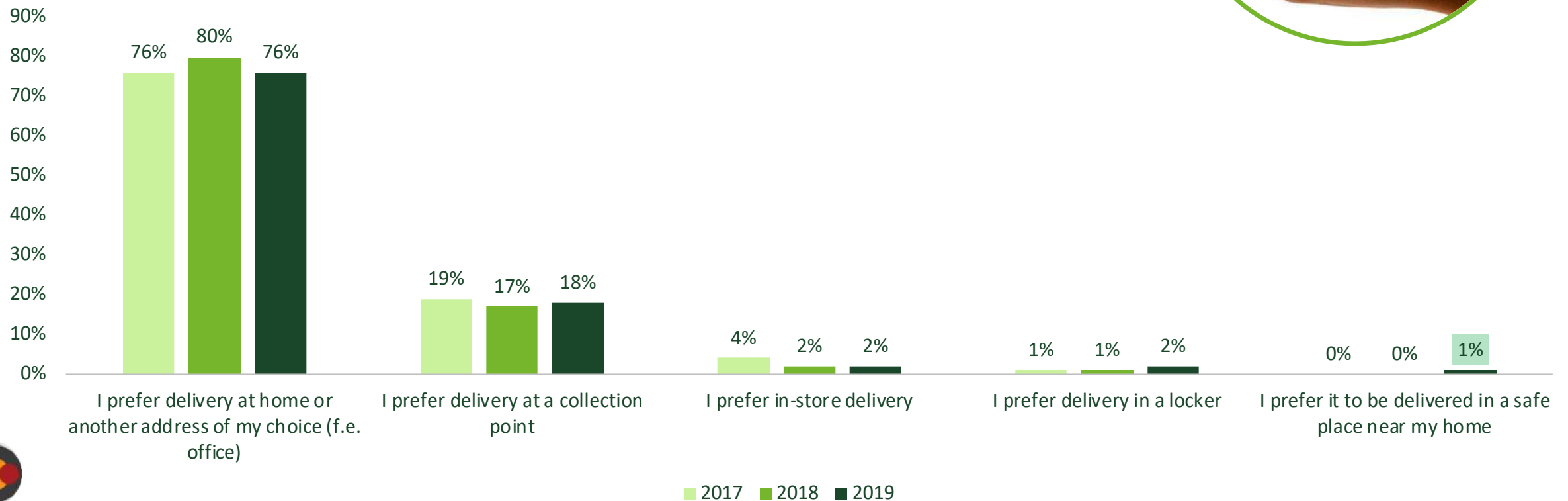
03 Online shopping habits

Delivery

- **No changes in preference**– Home delivery or at an address of choice remains the most popular delivery option (76%) when we ask Belgians to select one of these options.



Where do you prefer to have your order delivered?



Q1.17a Where do you prefer to have your order delivered? (SR)
Base: total samples 2017 (N=522), 2018 (N=415) and 2019 (N=416)

▲ Significantly higher/lower compared to 2018 (c.i. 95%)
▼

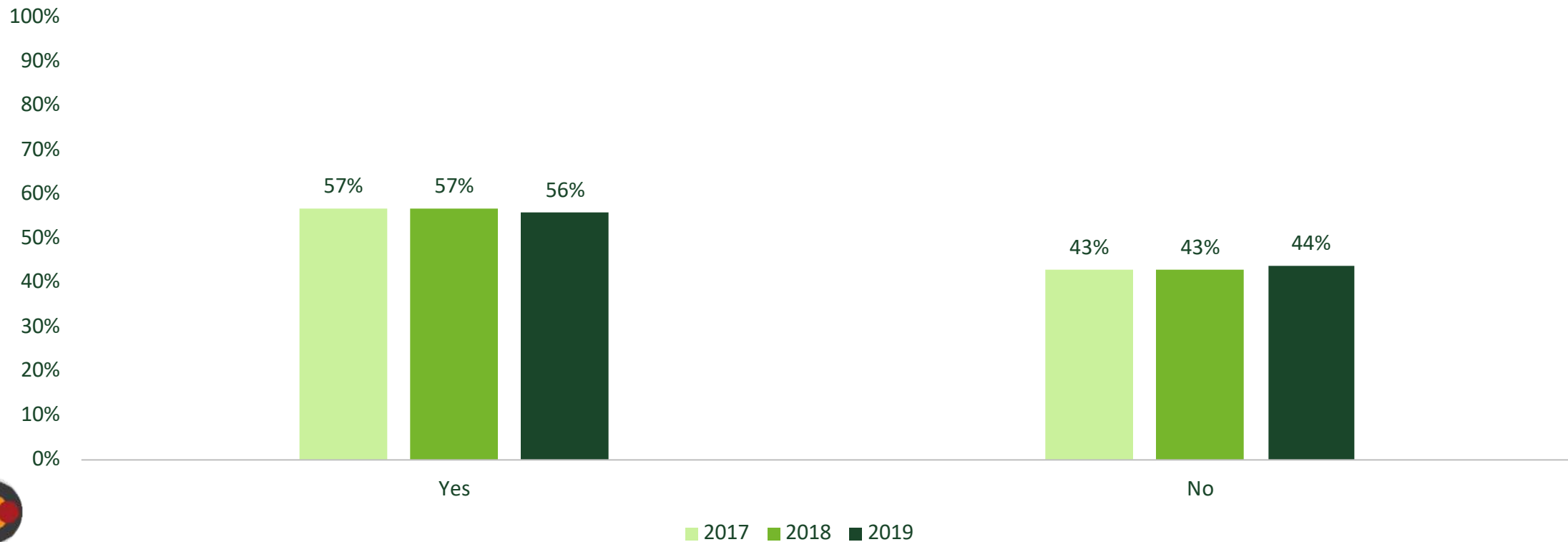
03 Online shopping habits

Delivery

2 types of Belgians

One group always goes for the same delivery option and the other prefers to choose their delivery method based on the type of product they ordered. The latter group is slightly larger, just like in 2017 and 2018.

Do you choose your delivery method depending on the type of product you buy online?



Q17b. Do you choose your delivery method depending on the type of product you buy online? (SR)
Base: total samples 2017 (N=522), 2018 (N=415) and 2019 (N=416)

▲ Significantly higher/lower
compared to 2018 (c.i. 95%)
▼

03 Online shopping habits

Delivery

The fact that 15% already claims to have a letterbox in which parcels can be delivered is surprising. Is this really the case or do people have a larger than average letterbox? Nevertheless, this number does indicate that some people are preparing themselves (and their houses) in view of home delivery of packages.

Do you have...?



Q18a. Do you have a customized letterbox at home, a so-called package letterbox, in which parcels can also be delivered? Q1.19a. Do you have a smartlock at home, in which the door can be opened remotely to let the parcel supplier in into your home (SR)
Base: new question 2019 (N=416)

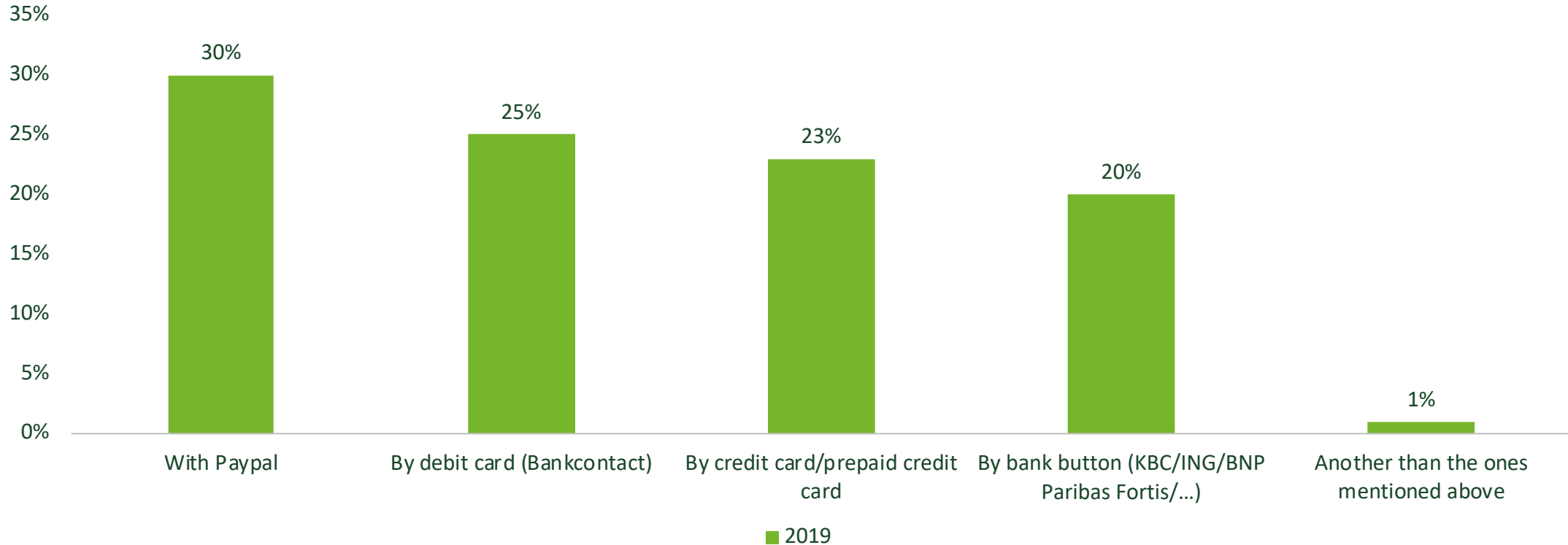
03 Online shopping habits

Payment

No clear preference, every seems to have his/her own favorite

- But with 30% PayPal is the most popular online payment method in 2019.
- About a quarter of Belgians prefer the use of a debit card (25%) or credit/prepaid card (23%).

How do you prefer to pay when you buy something online?



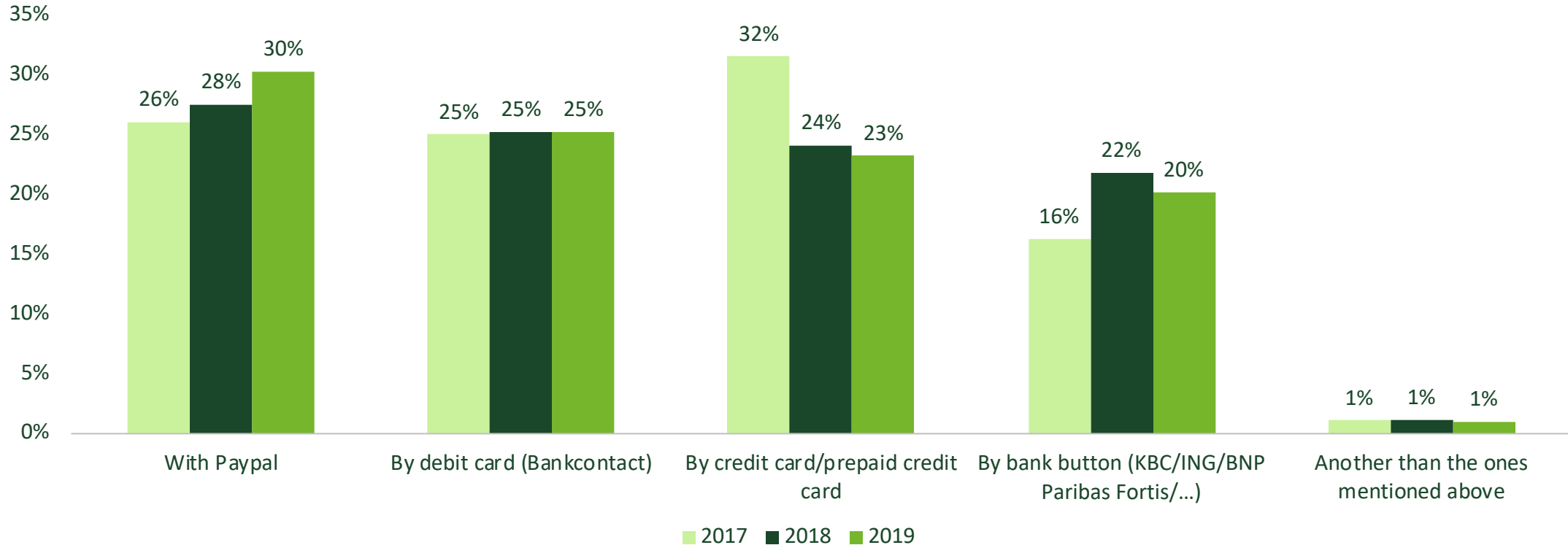
03 Online shopping habits

Payment

No clear preference, every seems to have his/her own favorite

- But with 30% PayPal is the most popular online payment method in 2019.
- About a quarter of Belgians prefer the use of a debit card (25%) or credit/prepaid card (23%).

How do you prefer to pay when you buy something online?



Q1.12 How do you prefer to pay when you buy something online? (SR)
Base: total samples 2017 (N=522) and 2018 (N=415) and 2019 (N=416)

03 Online shopping habits

Knowledge and concerns

1

Belgians are becoming **increasingly familiar with the different quality labels**. The group of Belgians who do not know any labels is gradually decreasing every year.

2

Undamaged delivery has become Belgian's **top 1 concern** when shopping. This instead of the product quality which has become the second strongest

3

Belgians spend **less time reading the attached documents and conditions** when online shopping.

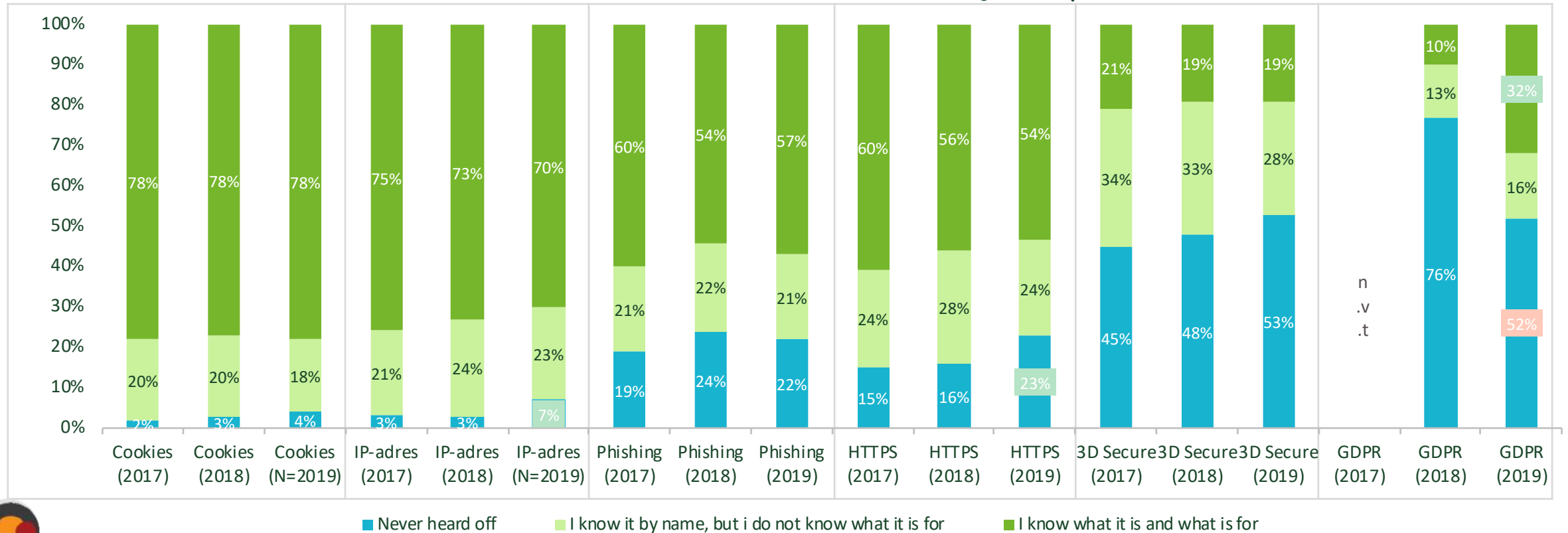


03 Online shopping habits

Awareness terminology

- Declining trend in the awareness level of the concepts IP-address, 3D secure and HTTPS
- Significant increase in the awareness level of GDPR (32% vs. 10%)

Are you aware of any of the following concepts?



Q1.15 Are you aware of any of the following concepts? (SR)
Base: total samples 2017 (N=522), 2018 (N=415) and 2019 (N=416)

▲ Significantly higher/lower compared to 2018 (c.i. 95%)
▼

03 Online shopping habits

Concerns

Undamaged delivery is Belgian's top 1 concern when shopping online. Undamaged delivery concerns Belgians today more than the product quality, which is still the second most common of 2019.

What worries you most when shopping online?
(Top 5 concerns)

2017

1. Product quality
2. Warranty
3. Payment
4. Undamaged delivery
5. Will it arrive at all

2018

1. Product quality
2. Undamaged delivery
3. Will it arrive at all
4. Warranty
5. Where & how to complain

2019

1. Undamaged delivery
2. Product quality
3. Warranty
4. Where & how to complain
5. My privacy



Q1.10 What worries you most when shopping online?
Base: total samples 2017 (N=522) and 2018 (N=415) and 2019 (N=416)

03 Online shopping habits
Concerns – full table

Less concerns
among Belgians
compared to 2018

The extent to which Belgians are concerned about these aspects when purchasing online has decreased compared to last year. The degree of concern decreased most strongly for:

- The quality of the product (-11%)
- Whether the product will be delivered at all (-12%)
- Unclear contact info (-12%)

	2019 (A)	2018 (B)
Base	416	415
Whether the product will arrive undamaged	46%	51%
The product warranty	41%	49%A
Where I can raise my complaints	41%	48%A
The quality of the product	41%	52%A
My privacy	40%	42%
Whether the product will be delivered at all	38%	50%A
Hidden costs regarding delivery	38%	44%
Unclear contact info	35%	47%A
Whether I have bought the right product	35%	38%
The origin of the webshop	33%	39%
The payment	28%	37%A



Q1.10 What worries you most when shopping online?
Base: total samples 2017 (N=522) and 2018 (N=415) and 2019 (N=416)

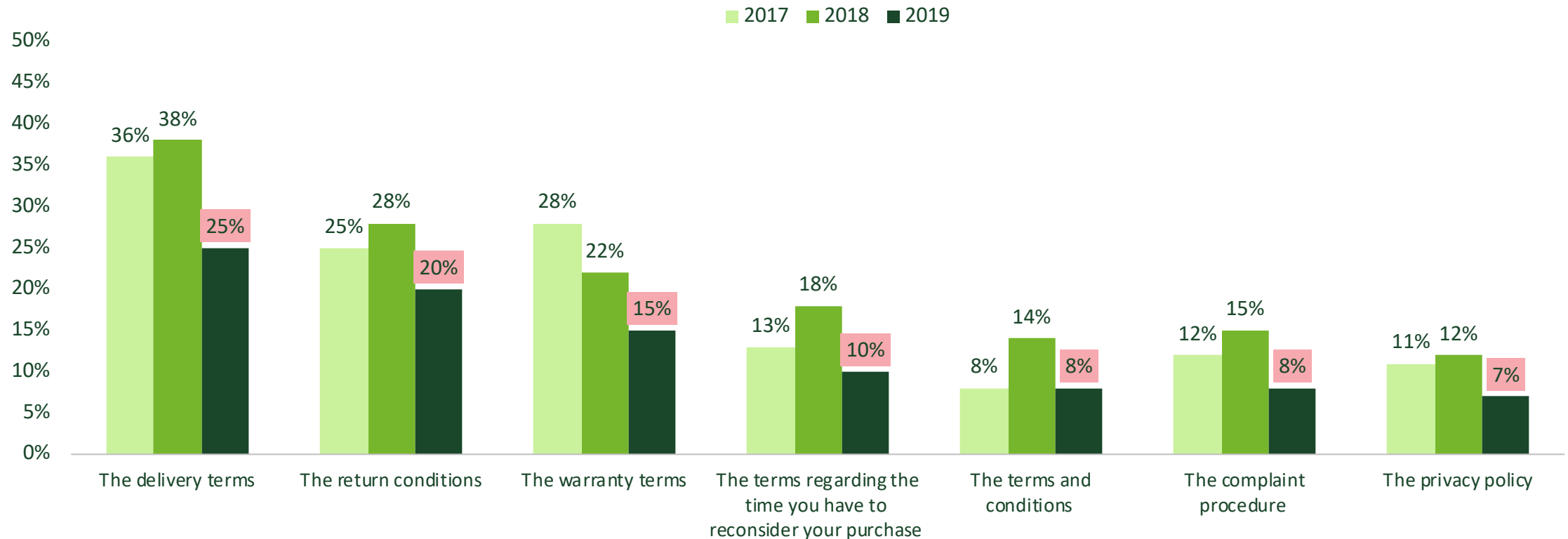
▲ Significantly higher/lower compared to A/B(c.i. 95%)

03 Online shopping habits

Documents and conditions

Decreased involvement in relation to these documents – Compared to 2018, the average Belgian is less inclined to check on these documents when purchasing online. However, delivery terms (25%) and return conditions (20%) remain the most consulted documents. A strong declining trend concerning the consultation of the warranty terms.

To which extent do you read the following documents or conditions when shopping online?
(Top 1%: I read this always when I shop online)



Q1.16.To which extent do you read the following documents or conditions when shopping online? Top 1%: I always read this when I shop online
Base: total samples 2017 (N=522) and 2018 (N=415) and 2019 (N=416)

▲ Significantly higher/lower compared to 2018 (c.i. 95%)
▼

04.

The ideal webshop



Ideal webshop Importance

Transparency, no additional costs, reliability and convenience are essential

Belgians' ideal webshop of 2019 focuses on (1) clear pricing and costs (2) reliable and fast delivery (3) low or no delivery fees (4) low or no administration fees and (5) user-friendly payment methods



Q3.1 Which of the following elements are important to you when discerning between good and bad webshops? Top 2 (important to very important)
Base: Total sample 2019 (N=416)

2019

Which of the following elements are important to you when discerning between good and bad webshops?



Ideal webshop

Importance – vs. 2018

The importance of additional security measures surrounding payment has had a significantly drop since last year

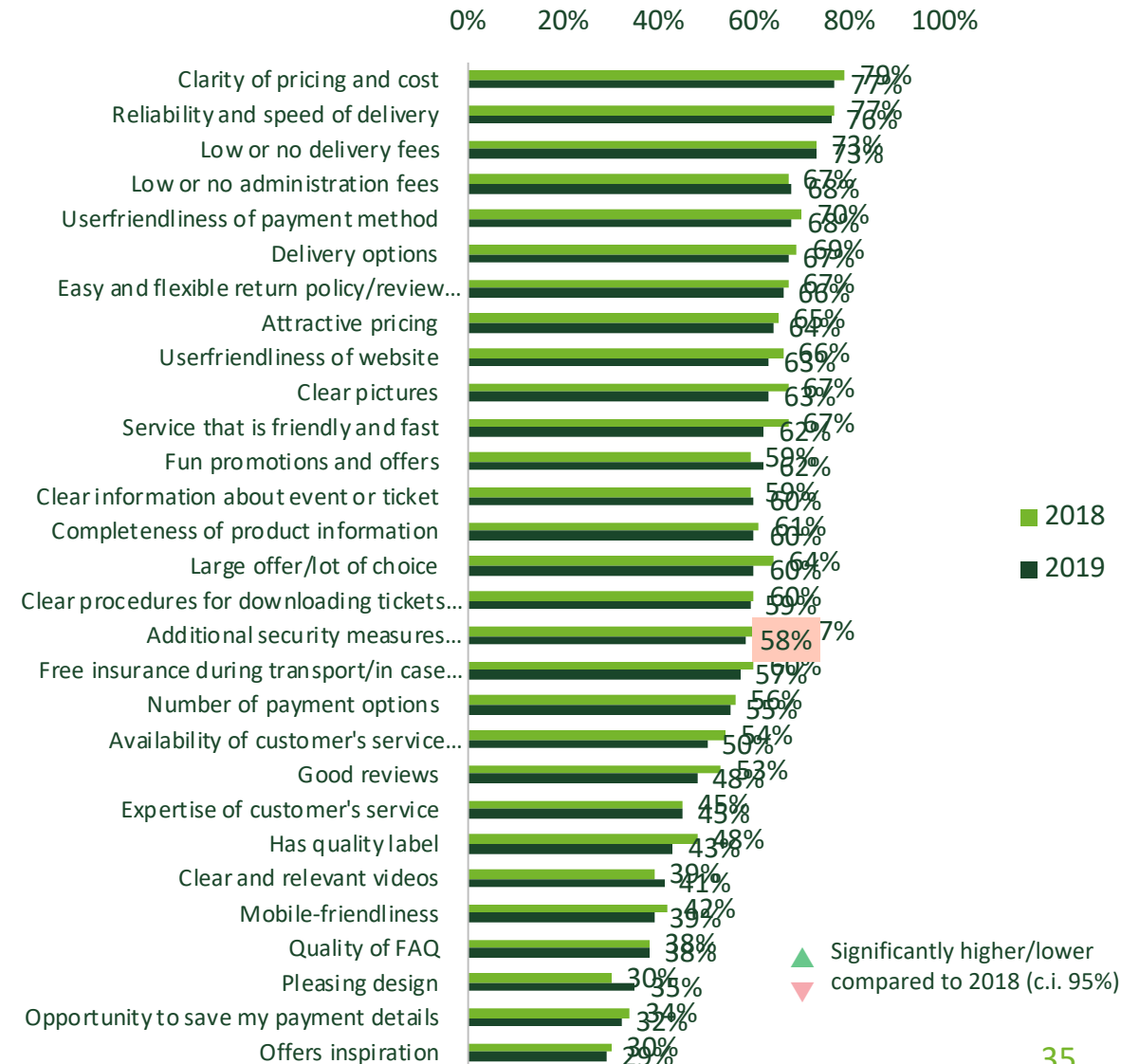
Nonetheless, Belgians' expectations about their ideal webshop have changed very little since 2018.



Q3.1 Which of the following elements are important to you when discerning between good and bad webshops? Top 2 (important to very important)
Base: Total sample 2018 (N=415) and 2019 (N=416)

2018-2019

Which of the following elements are important to you when discerning between good and bad webshops?



Ideal webshop Delivery

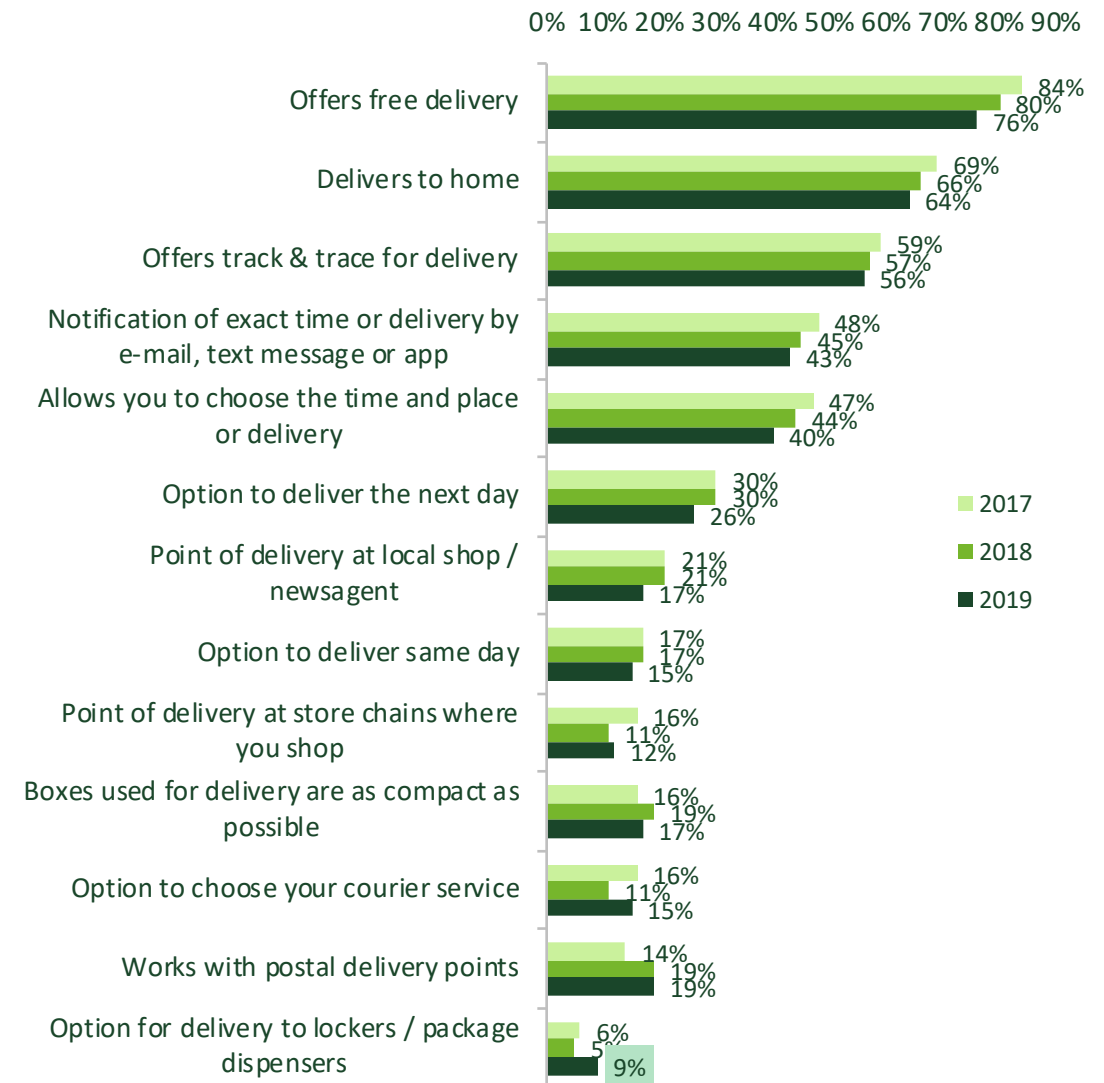
Delivery preferences largely remain unchanged.

Yet, we observe a slight declining trend in the weight of important aspects. On the other hand, the importance of an option to use delivery to lockers or package dispensers is significantly increased compared to 2018.



Q3.2 Which of these are the building blocks for the ideal webshop, in your opinion?
Pick 5. Top 2 %
Base: total samples 2017 (N=522), 2018 (N=415) and 2019 (N=416)

Which of these are the building blocks for the ideal webshop, in your opinion?
(Top 2 picks)



▲ Significantly higher/lower compared to 2018 (c.i. 95%)
▼

Ideal webshop

Customer care

Preference for reaching customer's service via phone has significantly dropped

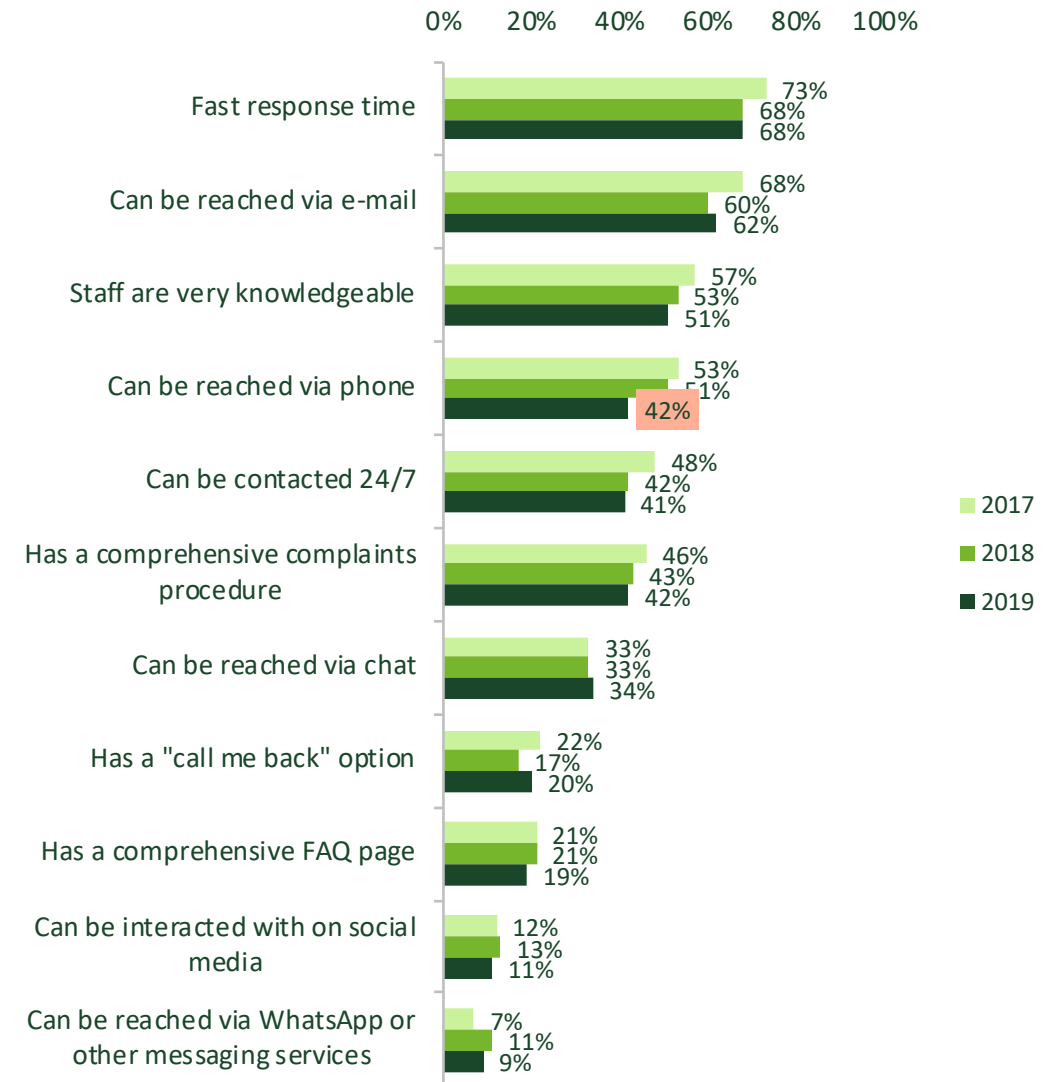
Other preferences linked to customer care remained stable compared 2018.



Q3.2 Which of these are the building blocks for the ideal webshop, in your opinion?
Pick 5. Top 2 %
Base: total samples 2017 (N=522), 2018 (N=415) and 2019 (N=416)

Which of these are the building blocks for the ideal webshop, in your opinion?

(Top 2 picks)



▲ Significantly higher/lower compared to 2018 (c.i. 95%)
▼

Ideal webshop

Payment & Terms

Clear mentioning all supplementary costs and clear purchasing procedures have become less important

Other preferences linked to payment and terms remained stable compared 2018.

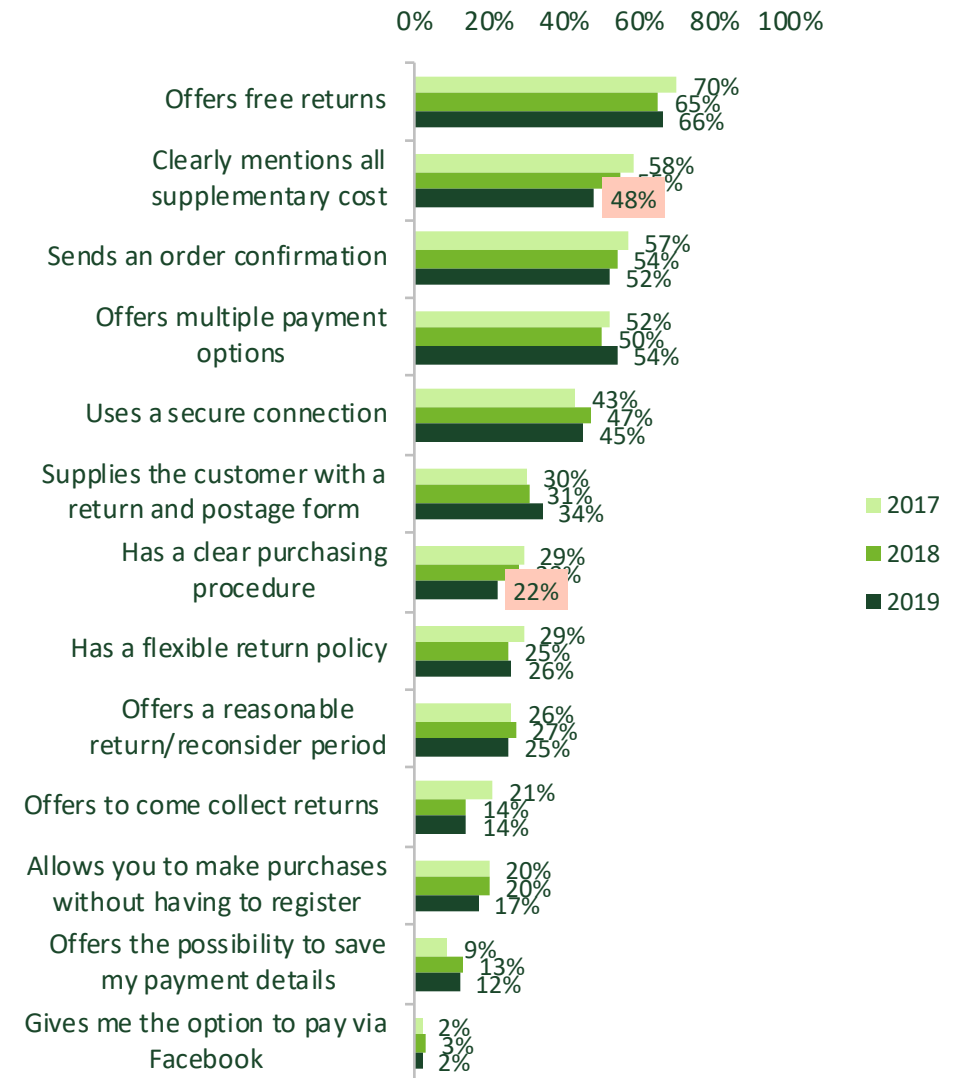


Q3.2 Which of these are the building blocks for the ideal webshop, in your opinion?

Pick 5. Top 2 %

Base: total samples 2017 (N=522), 2018 (N=415) and 2019 (N=416)

Which of these are the building blocks for the ideal webshop, in your opinion?
(Top 2 picks)



▲ Significantly higher/lower compared to 2018 (c.i. 95%)
▼

Ideal webshop

Website characteristics

Declining trend in the importance of competitive pricing, but it remains the most important

This might be correlated with the fact that webshops are more common now and they don't only have to differentiate themselves on price



Which of these are the building blocks for the ideal webshop, in your opinion?

(Top 2 picks)



▲ Significantly higher/lower compared to 2018 (c.i. 95%)
▼

Q3.2 Which of these are the building blocks for the ideal webshop, in your opinion?

Pick 5. Top 2 %

Base: total samples 2017 (N=522), 2018 (N=415) and 2019 (N=416)

Ideal webshop

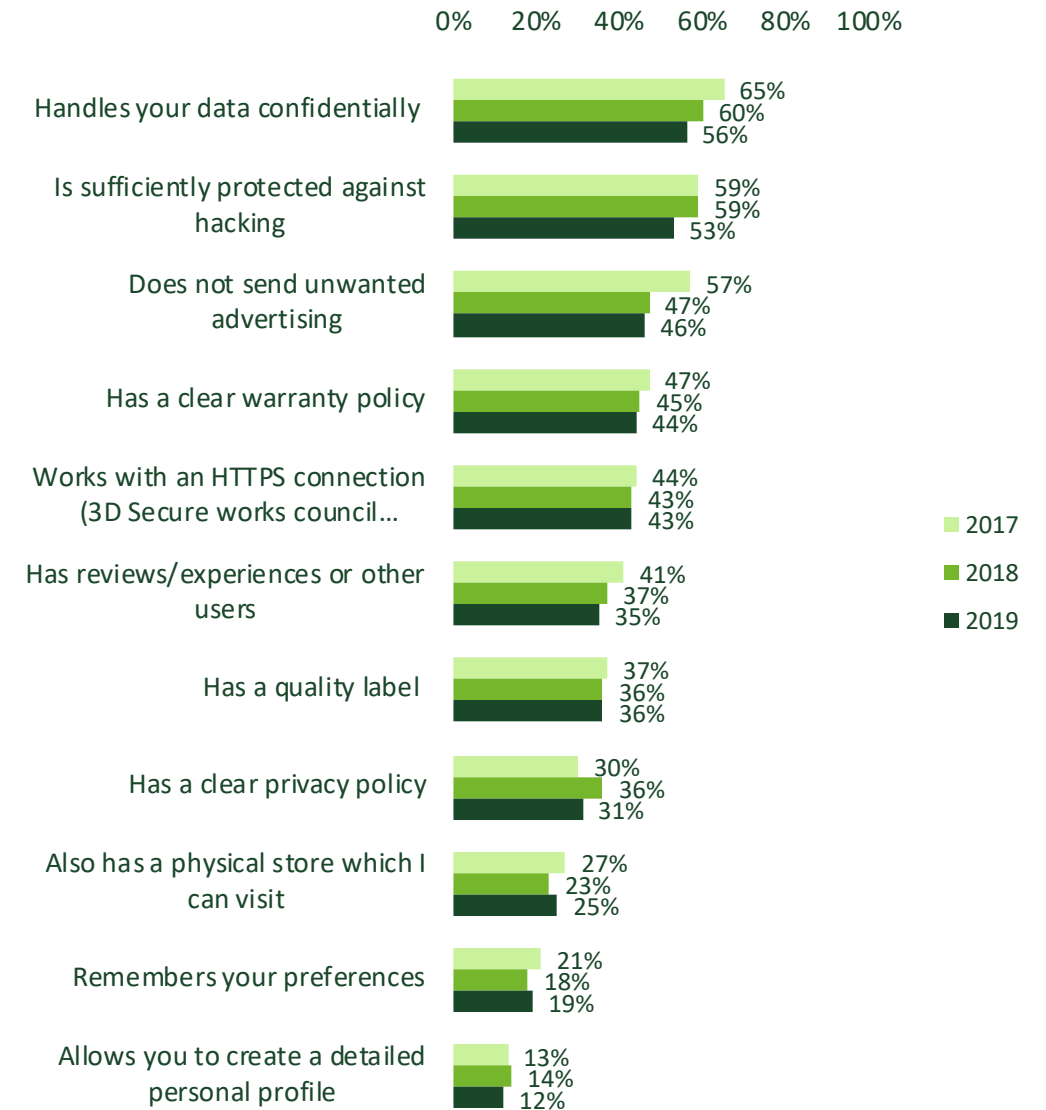
Security and trust

No significant changes compared to 2018



Q3.2 Which of these are the building blocks for the ideal webshop, in your opinion?
Pick 5. Top 2 %
Base: total samples 2017 (N=522), 2018 (N=415) and 2019 (N=416)

Which of these are the building blocks for the ideal webshop, in your opinion?
(Top 2 picks)



▲ Significantly higher/lower compared to 2018 (c.i. 95%)
▼

05. Segmentation

Attitudes toward online shopping



Online shopping as a source of inspiration had a significant boost compared to last year

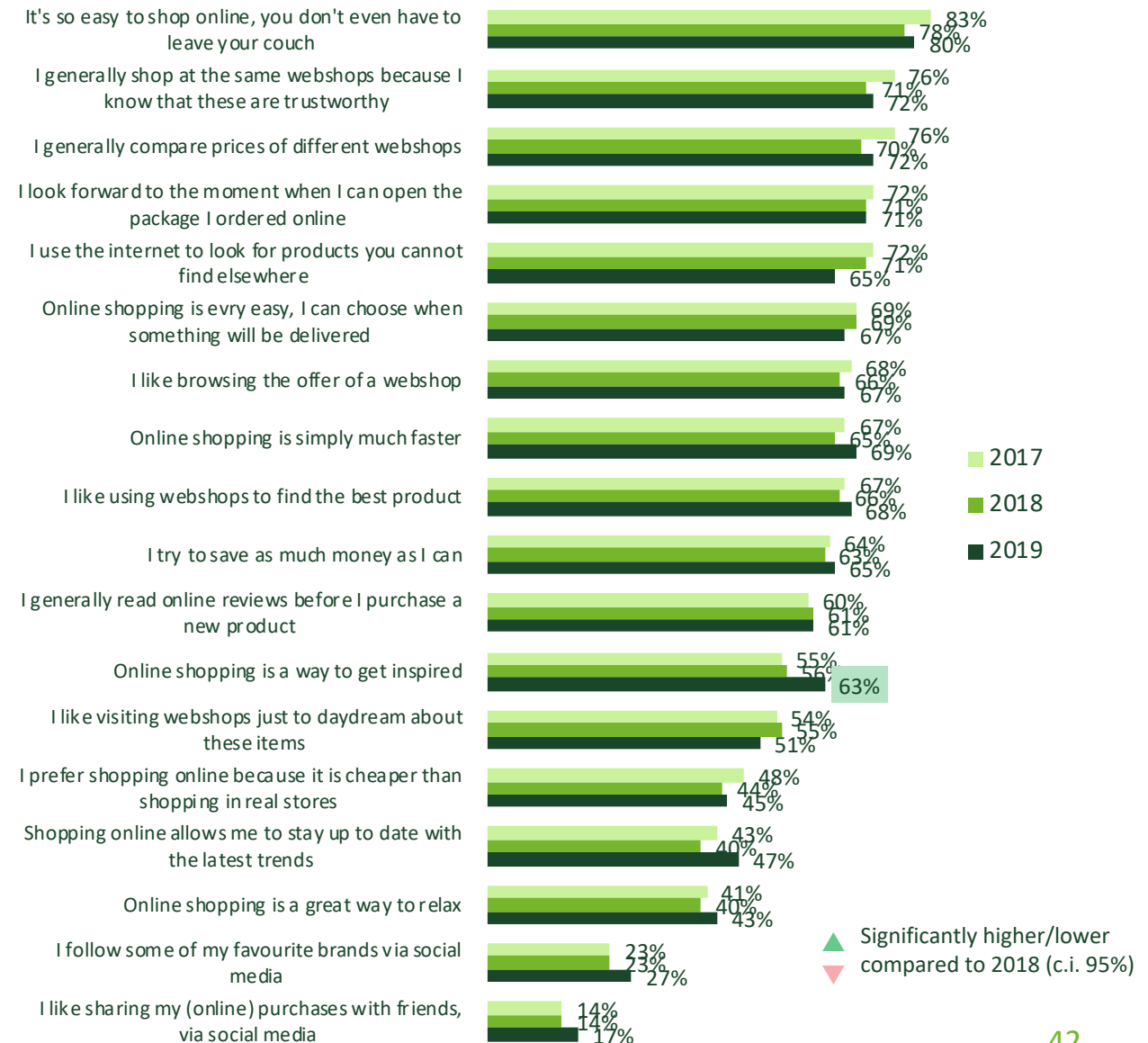
The other shopping attitudes differ very little compared to the attitudes of 2018.



Q2.2. To which extent do you agree with the following statements?
5-point scale (top 2: (totally) agree)
Base: total samples 2017 (N=522), 2018 (N=415) and 2019 (N=416)

To which extent do you agree with the following statements?

Top 2: agree



05 Segmentation

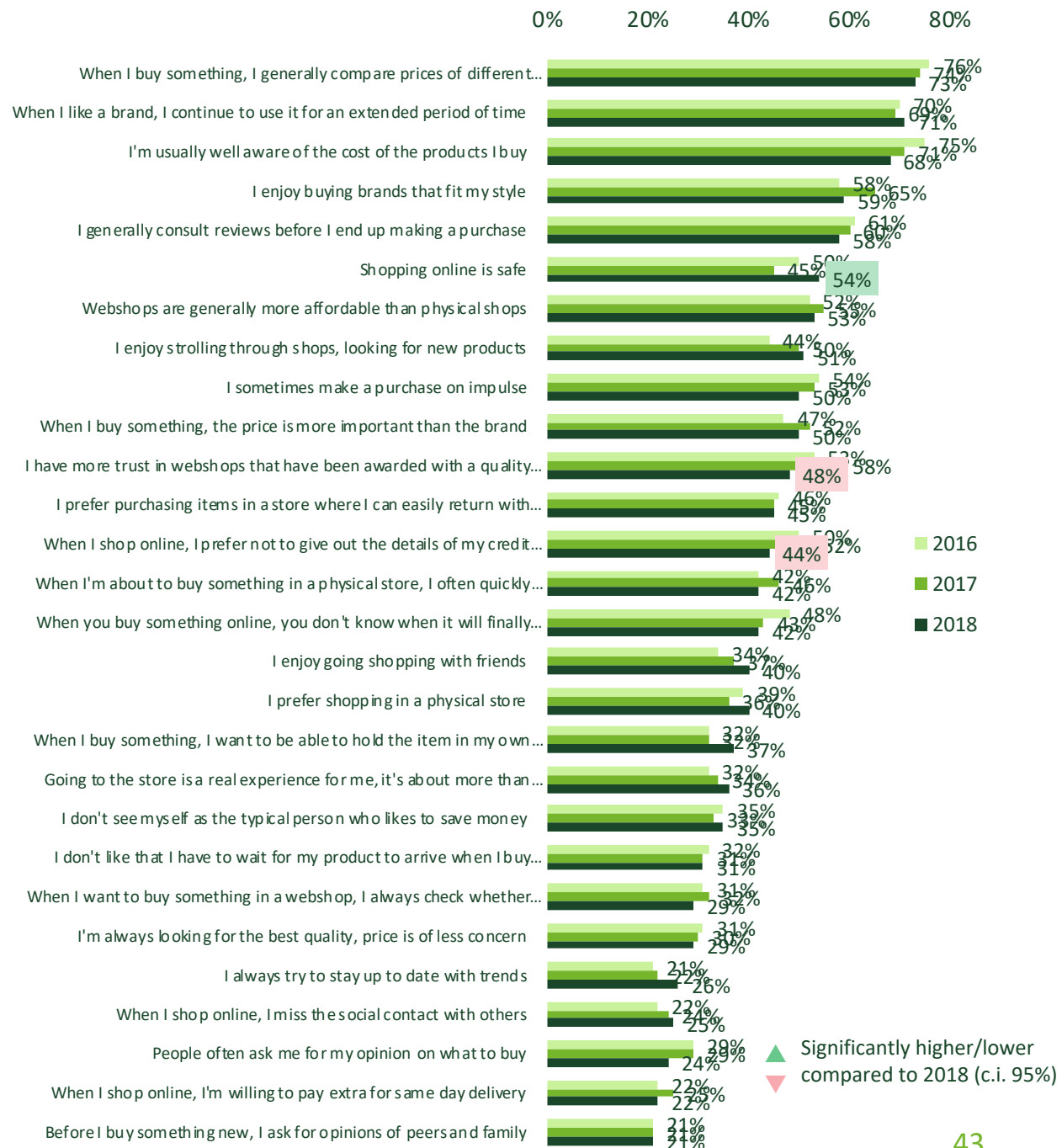
General shopping attitudes

Trust in online shopping increases

The amount of Belgians who believe that online shopping is safe has significantly increased since 2018. This growing trust is also reflected in the declining demand for an explicit quality label and the dropped inhibition to share personal credit data with suppliers.

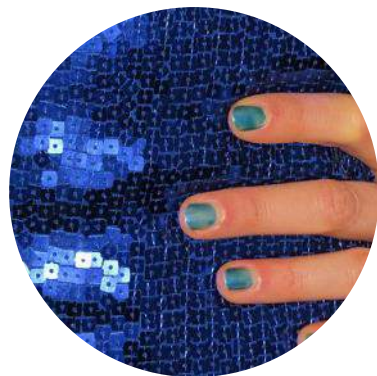


Q2.2. To which extent do you agree with the following statements?
5-point scale (top 2: (totally) agree)
Base: total samples 2017 (N=522), 2018 (N=415) and 2019 (N=416)



05 Quantitative segmentation

Attitudes toward online shopping

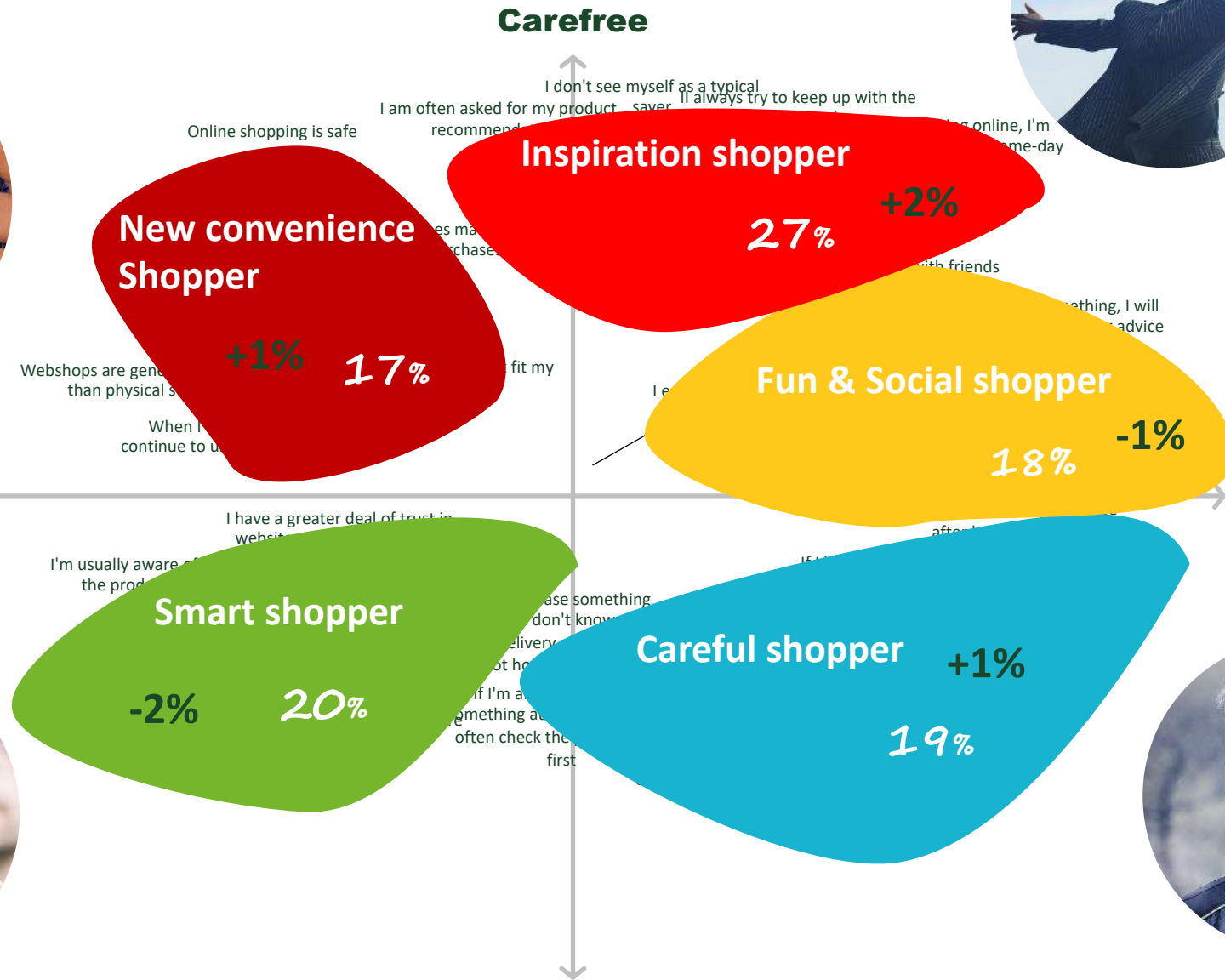


Practical Focus

Experience Focus

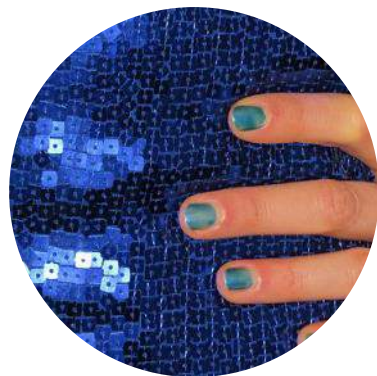
Carefree

Controlled



05 Quantitative segmentation

Attitudes toward online shopping

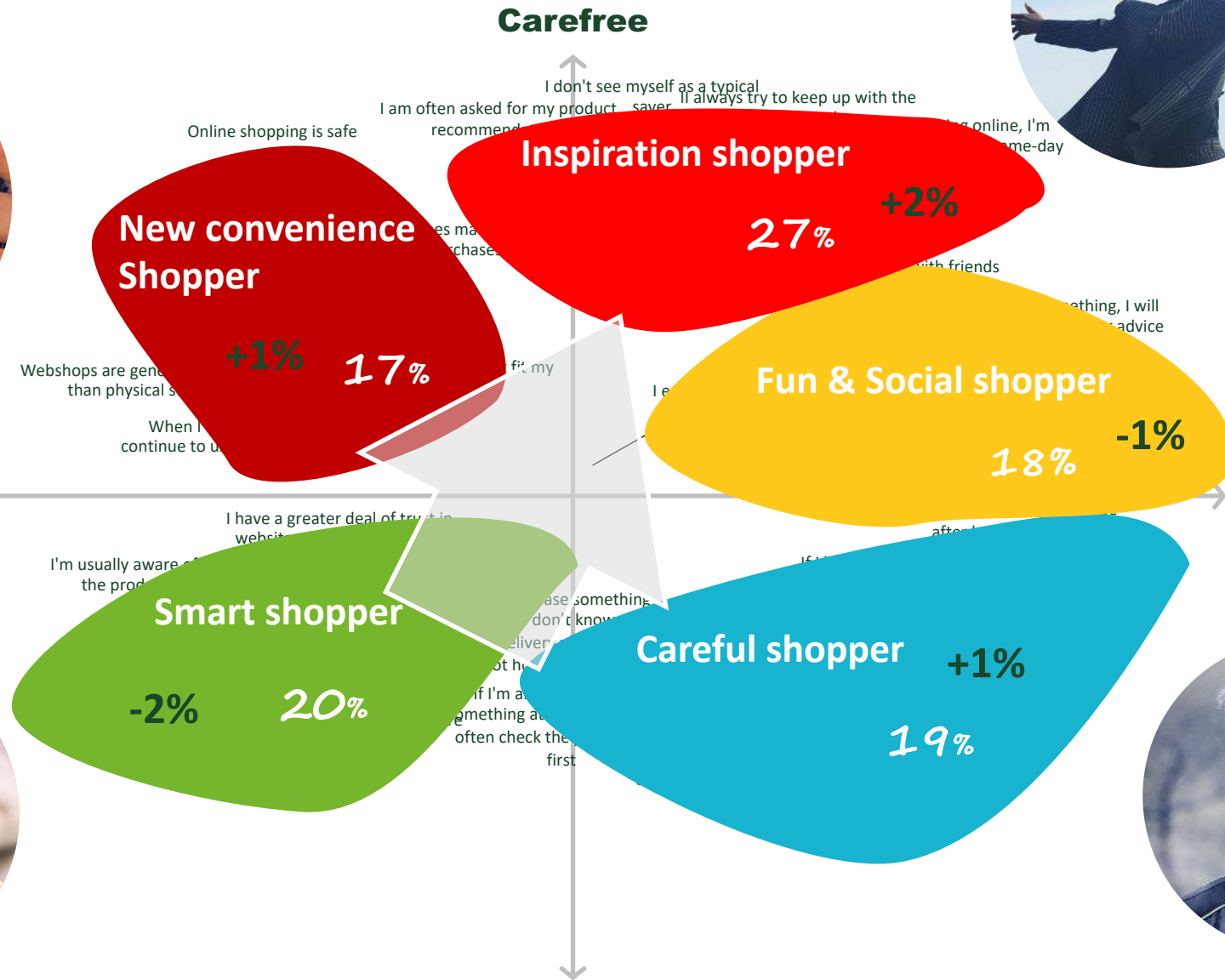


Practical Focus

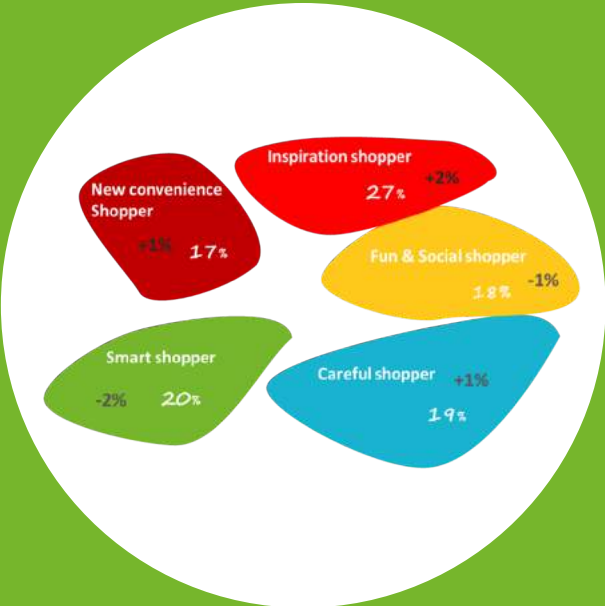
Experience Focus

Carefree

Controlled



Upward shift:
Inspiration and New
Convenience shoppers
have grown consistently
each year



Evolution

	Careful shoppers	Inspiration Shoppers	Fun & Social Shoppers	Smart Shoppers	New Convenience Shopper
2017	21%	24%	21%	19%	14%
2018	18%	25%	19%	22%	16%
2019	19%	27%	18%	20%	17%
Difference with 2018	+1%	+2%	-1%	-2%	+1%





Careful Shoppers

Lowest
Purchase
Frequency

Buy more often
Tickets for concerts /
movies
Travel

Segment
size:
19%

- **Attach more importance to physical presence**
 - **Need staff / service**
 - **Tactile experience = key**
 - **Sceptical about safety**
 - **Like quality labels**
 - **All in all, limited enthusiasm about online shopping**
- **Overrepresentation of**
 - **55-65**
 - **Lower educated**



Inspiration Shoppers

Highest
Purchase
Frequency

Segment
size:

27%

Buy more often
Shoes, Games, Pet products

- On top of new trends
- **Give advice** to others
- **Follow favorite brands**
- Share purchases on **social media**
- Quality more important than price
- Want to pay extra for same day delivery
- No concerns sharing payment details
- **Mobile = important**
- Active lovers of online shopping

- **Overrepresentation of**
 - **Men**
 - **35-44**
 - **Urban**





Fun & Social Shoppers

Average
Purchase Frequency

Buy more often
Concert &
Movietickets

Segment
size:

18%

- Shopping = social
 - Online shopping is **lonely**
 - Heavy **social media** users
 - Share purchases / follow brands
 - Online shops can be **inspiring** but real shops are still more fun
- **Overrepresentation of**
 - **18-24 & 25-34**
 - **Suburban**



Smart Shoppers

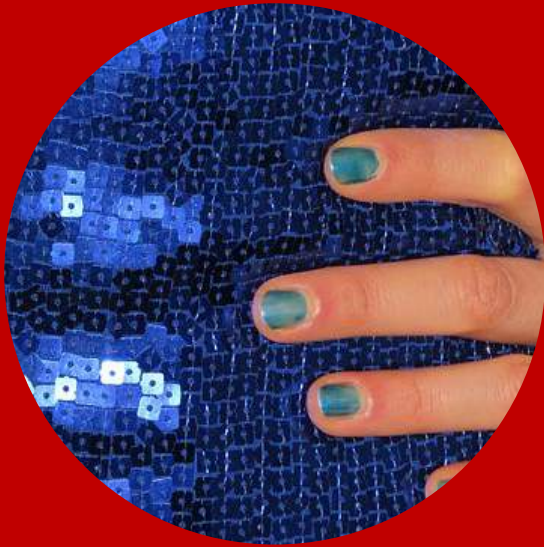
Average
Purchase Frequency

Segment
size:
20%

Buy more often
Airplane tickets; music; film;
home / garden pet articles;
sports gear

- **Tech, offer & price savvy**
- **Compare**
- **Safety measures!**
- **Online reviews** important
- **Like quality labels**
- **Low interest social media to share purchases or follow brands**

- **Overrepresentation of**
 - **55-65**
 - **Men**
 - **Higher educated**



New Convenience Shopper

High
Purchase Frequency

Segment
size:
17%

Buy more often
Fashion; Books; Beauty &
Health; Shoes; Electronics;
Home & Garden decoration

- **Very pragmatic**, no-nonsense
- **Put functionality first, design second**
- **Look for products fitting their own, individual style**
- **Brand loyal but sometimes impulsive**
- **No big safety concerns**
- **Overrepresentation of**
 - **18-24**
 - **Women**
 - **No kids**
 - **Higher educated**



06.

Additional questions

(Only 2019 sample)



Additional questions Innovations

Belgians see most potential in visual aids when shopping

Visual innovations, like virtual try-on, product video's and augmented reality evoke relatively more interest among Belgians. A select group is very enthusiastic : somewhat less than 1 in 5 Belgians believes that these innovations would actually be a huge improvement to their shopping experience.

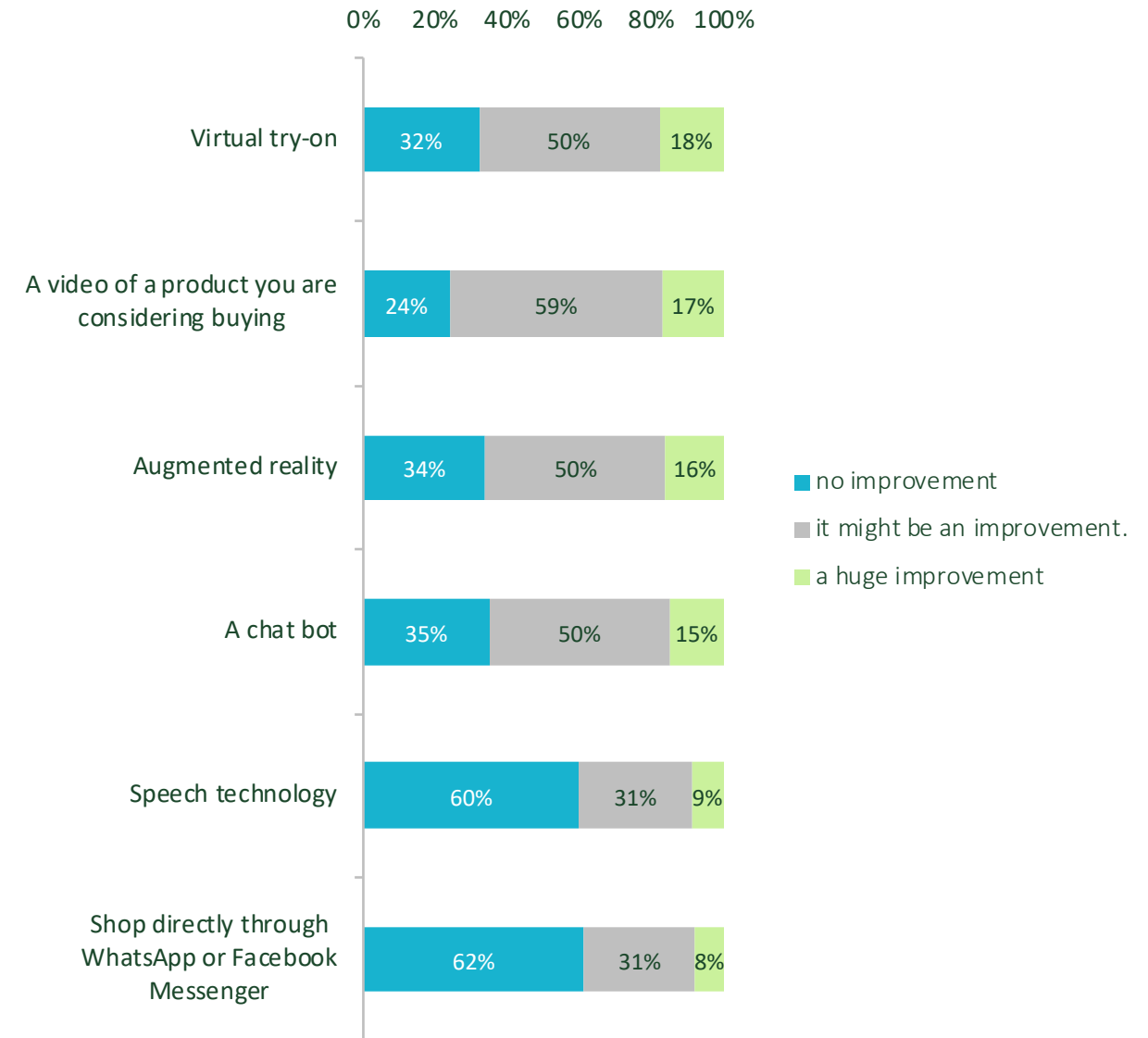
People struggle a bit more to see the benefits of speech technology and shopping directly through WhatsApp or Messenger (unknown is unloved?).



Q3.3. Below you can find a list of innovations related to online shopping. To what extent do you think each of these would improve your shopping experience?

Base: total sample 2019 (N=416)

To what extent do you think each of these innovations would improve your shopping experience?



Additional questions

Online market places

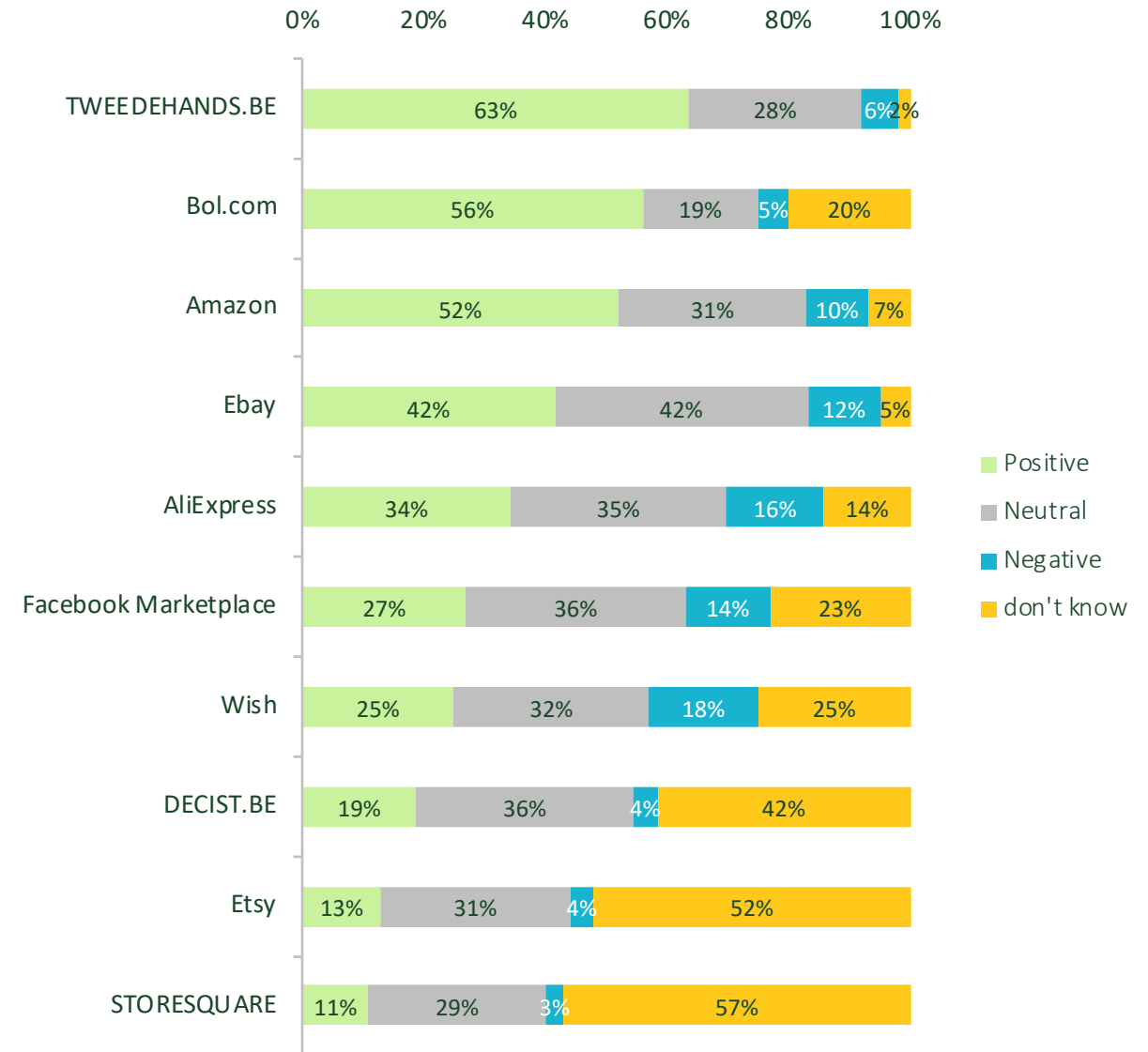
TWEEDEHANDS.BE has many fans in Belgium

- More than 6 out of 10 Belgian are (very) positive about TWEEDEHANDS.BE, making it a more popular marketplace than (international) websites like Bol.com, Amazon and Ebay.
- Negative feelings remain limited for most of these websites. Nevertheless, international brands like Amazon, Ebay, AliExpress and Facebook Marketplace evoke relatively more outspoken negative reactions.



Q3.4. How do you feel about the following online marketplaces?
5-point scale (Top 2: (very) positive – neutral – bottom 2: (very) negative)
Base: total sample 2019 (N=416)

How do you feel about the following online marketplaces?



Key takeouts



Key takeouts

Online shopping in 2019	conclusions
Frequency	<ul style="list-style-type: none">• The frequency of online shopping continues to grow in Belgium• Increased scope of online shopping: online shopping frequency shows an overall boost across categories compared to 2018, both in well- and less established product categories• Most Belgians believe that their online shopping behaviour won't change over the next year
Mobile shopping	<ul style="list-style-type: none">• Increased use of smartphone and tablet for online shopping purposes compared to 2018• Most Belgians who shop using their smartphone or tablet prefer to browse to a webshop's website instead of using the webshop's app.
Delivery & Pay	<ul style="list-style-type: none">• Home delivery or delivery at an address of choice remains the most popular delivery option• Most Belgians still prefer to choose their delivery method based on the product they ordered• Belgians differ in their payment preferences, but PayPal is currently the most popular payment method
Awareness and concerns	<ul style="list-style-type: none">• Belgians are becoming increasingly familiar with the different quality labels• Undamaged delivery has become Belgian's top 1 concern when shopping online in contrast to the quality of the product itself like in 2018. Yet, product quality still is Belgian's second strongest concern when purchasing online in 2019.• Belgians spend less time reading the attached documents and conditions of an online purchase compared to 2018

Key takeouts

Online shopping in 2019	conclusions
Innovations	<ul style="list-style-type: none">• Most Belgians don't see how speech technology and social media can improve their online shopping experience• Visual innovations, like virtual try-on, product video's and augmented reality evoke remarkably less resistance among Belgians. Some Belgians are even very enthusiastic about these innovations.
Online marketplaces	<ul style="list-style-type: none">• Belgians are very satisfied with TWEEDHANDS.BE, making it the most popular (and well known) online market place• international market places like Amazon, Ebay, AliExpress and Facebook Marketplace evoke relatively more outspoken negative reactions.

Thank you,

And let's talk!



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**Talk to us if you
have questions!**

**Detailed reports
and data are
available: ask a
quote**

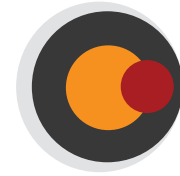
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