Nomadic Commerce 2025 Survey

Ismael El Kassimi, Data & Insights Expert
Nicolas Jacqmin, Data & Insights Expert

choreograph
A WPP Media Brand

Key Research Objectives

01 How are consumers' commerce behaviours evolving since 2021 ?

We measure penetration, frequency, and spend across online and offline channels to identify shifts in shopping habits.

02 Which product categories and channels drive online vs offline purchases?

We map category preferences, brand choices, and platform usage to understand where and how consumers shop.

03 What drives satisfaction and what barriers limit online shopping growth?

We assess key motivators, pain points, and satisfaction levels by category and shopping experience.

04 How are payment methods shifting towards digital and cashless solutions?

We track adoption, trust, and security perceptions of modern payment options, from mobile wallets to deferred payments.

05 What role does re-commerce play in consumer behaviour and sustainability?

We examine second-hand shopping behaviours and their role in circular consumption, alongside consumers' willingness to pay for eco-friendly delivery.

06 How are emerging technologies and AI shaping the shopping experience?

We measure interest, comfort, and trust in AR/VR, AI-powered tools, and data-driven personalization.

07 How do consumers perceive and respond to influencer marketing?

We identify the platforms, content types, and triggers that convert influence into purchase.

Research Set-Up & Methodology

CAWI INTERVIEWS

Data collected with high quality standards.

SAMPLING

Sample size is composed of **1.000 people representative for the Belgian population** 18-59, for thorough in-depth analysis.

FIELDWORK

The data were collected between 20/10/2025 to 07/11/2025.

STRICT WEIGHTING

We applied strict weighting procedures based on language, gender, age, region, social groups, education level & urbanization.

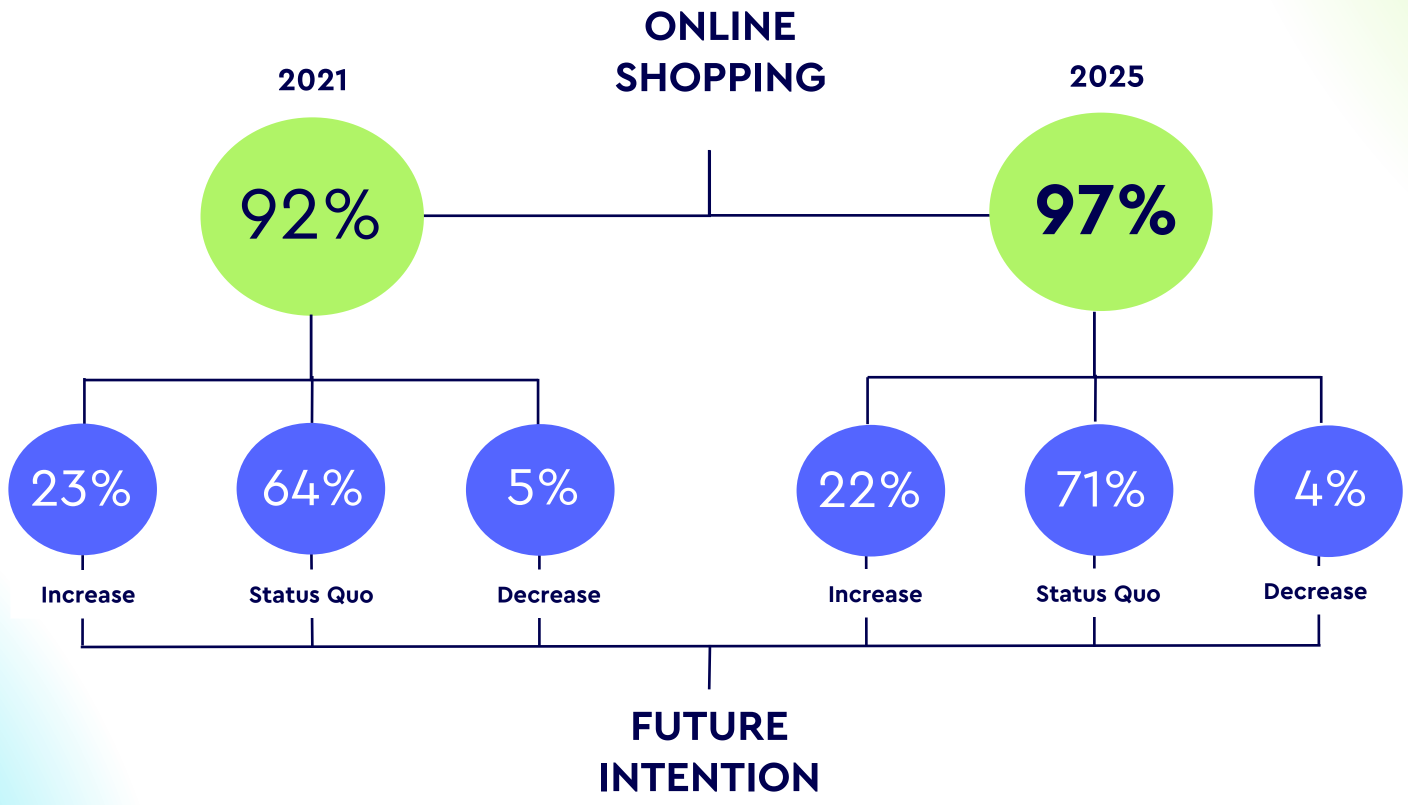
SECTION 01

The state of Phygital experience in Belgium

01

Belgium's E-commerce penetration still expending

From 92% in 2021 to 97% in 2025, most consumers intend to buy status-quo or even more online in the future



Did you purchase online in the last 12 months ?
Are you planning in the future to increase or decrease your share of online purchases ?

People are nomadic shoppers

Worlds are blending, no more separate ways of buying

91%
Webrooming
+20% points
vs. 2021

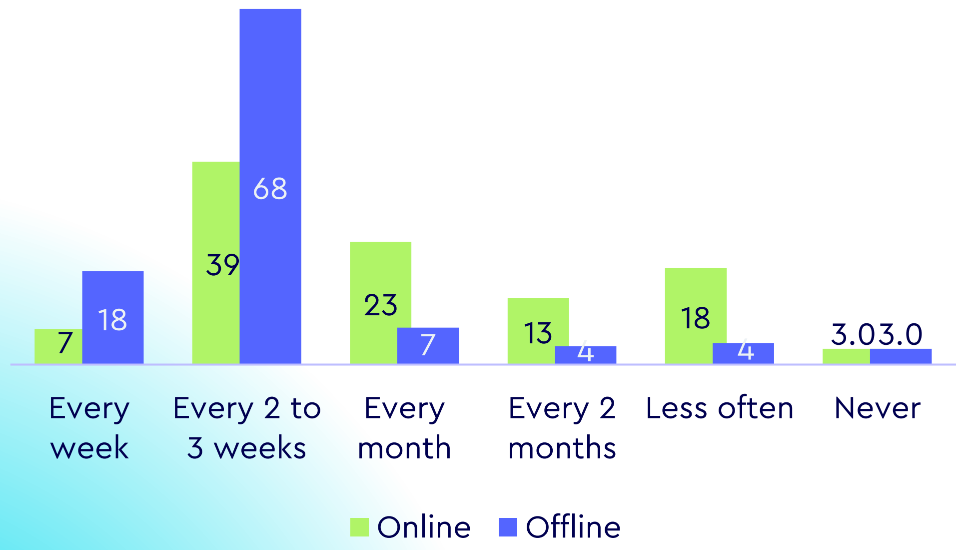
80%
Showrooming
+41% points
vs. 2021

74%
Smartphone usage in-store for comparison
+14% points
vs. 2021

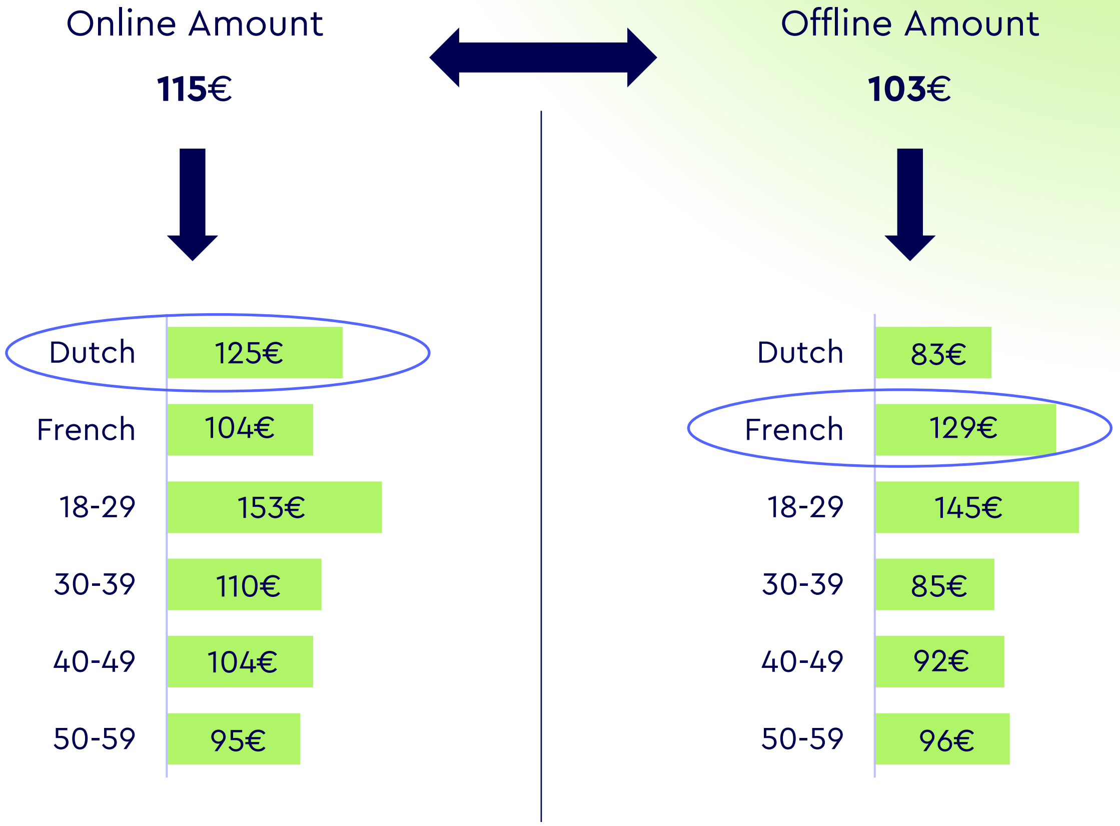
Online vs. offline : different behaviours, different baskets

7 Belgian on 10 shop online on a monthly base, while more than 8 out of 10 shop offline every 1 to 3 weeks

Online vs. Offline purchase frequency



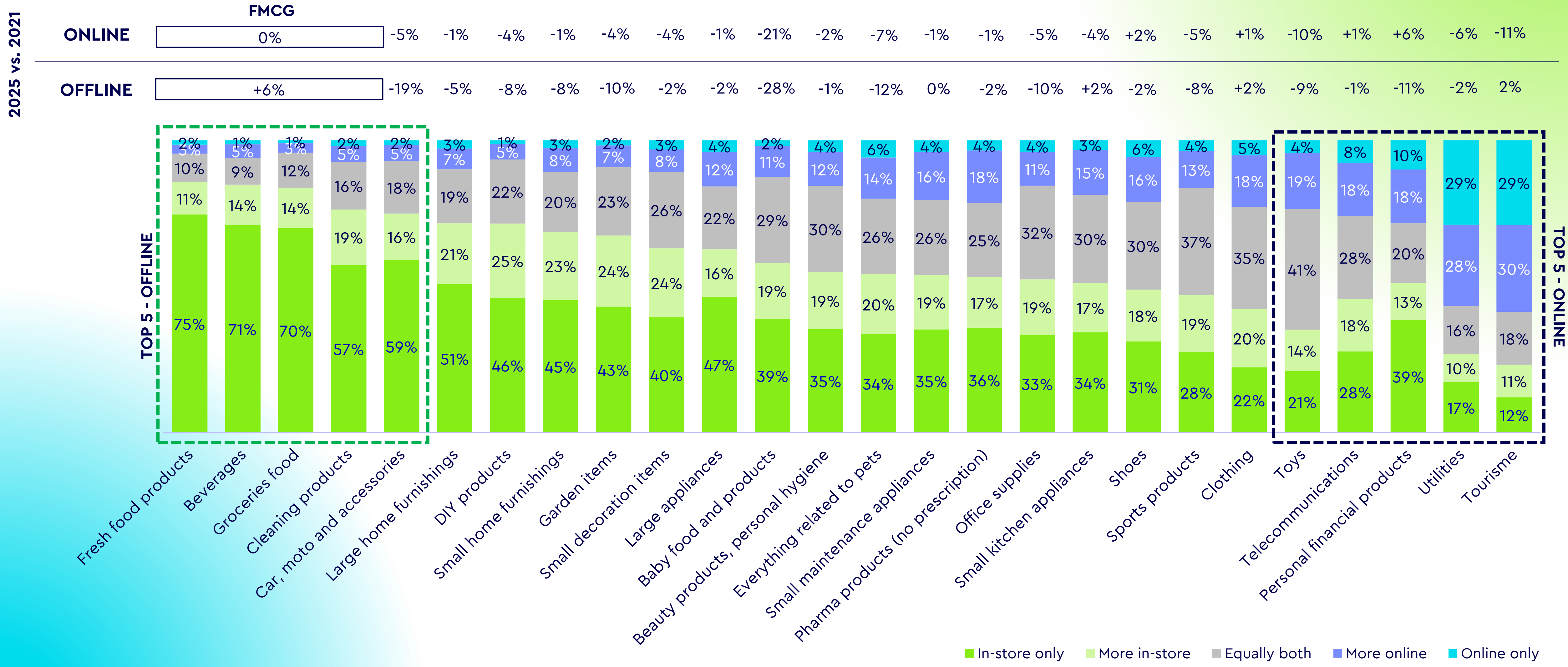
Online vs. Offline average spend last time



How often do you shop online/offline ?
What's the total amount of your last online/offline purchase ?

The divide is great between categories

Some thrive online, some still are offline strongholds



For each of the following product categories, can you indicate which situation best suits you ? I buy …

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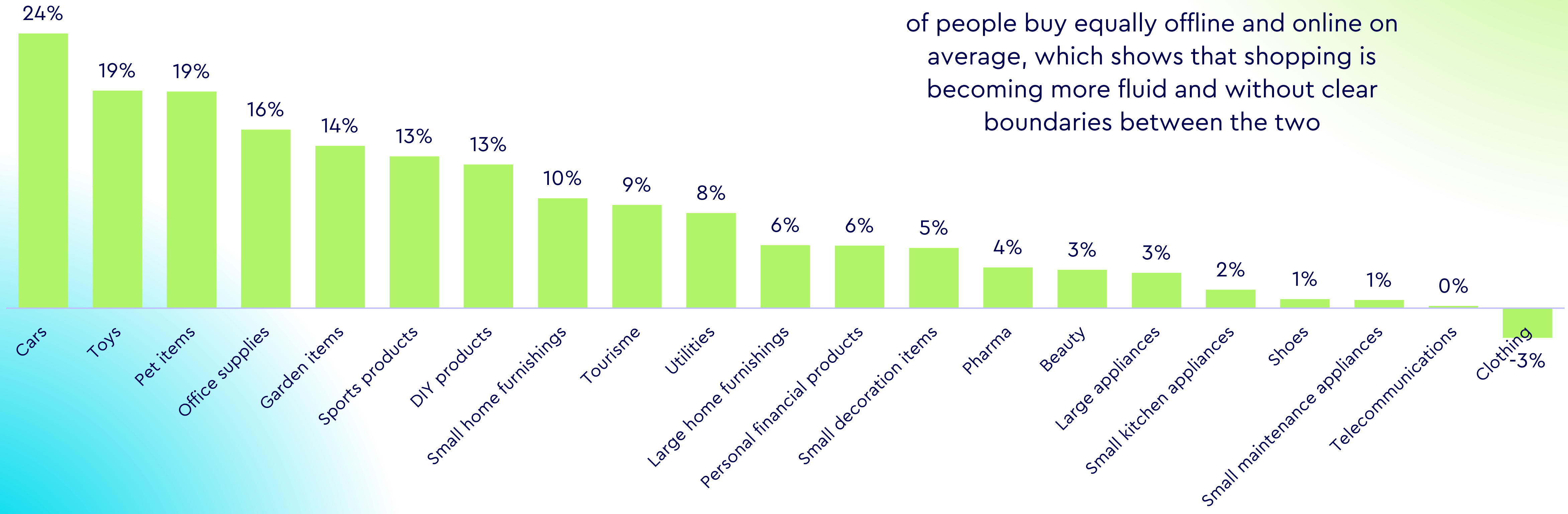
Multichannel buying – Omnichannel presence

A 2025 vs. 2021 comparison across categories



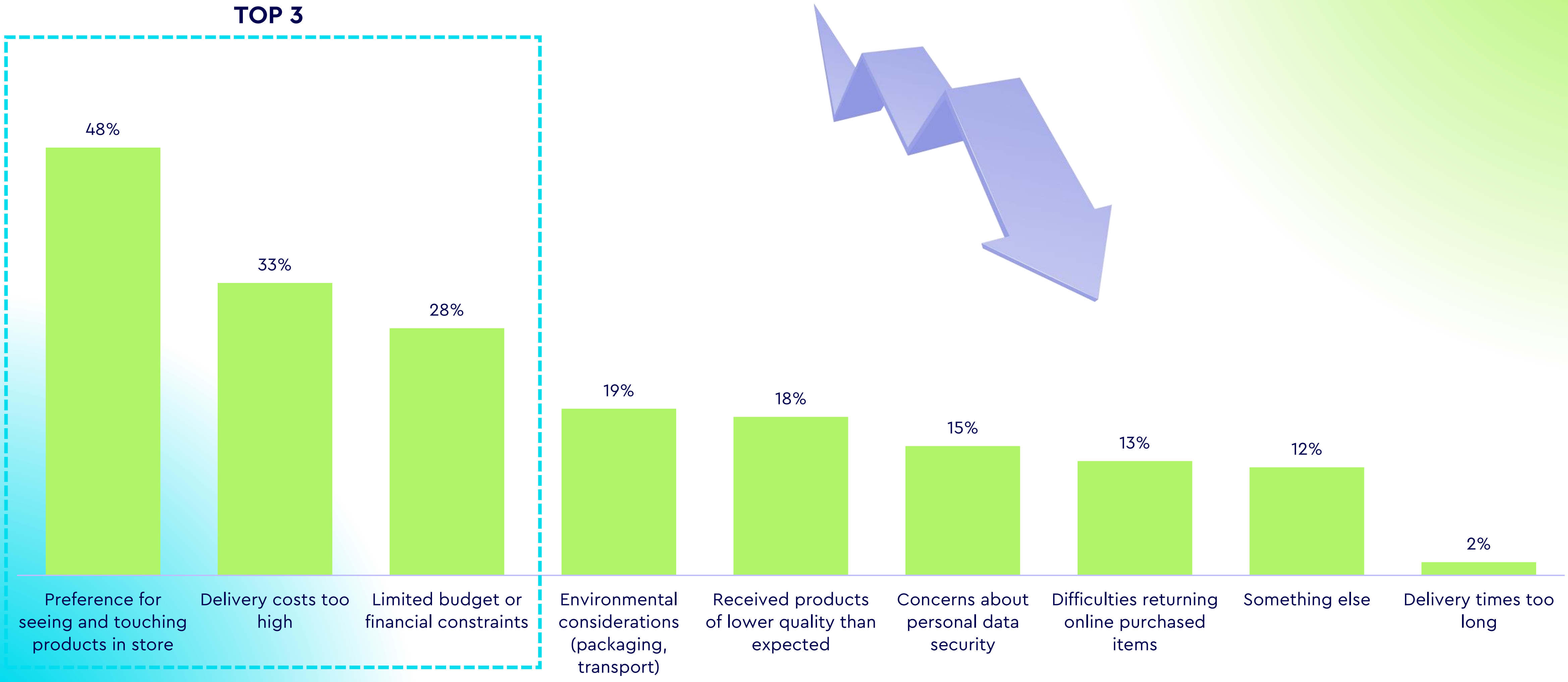
+9%

of people buy equally offline and online on average, which shows that shopping is becoming more fluid and without clear boundaries between the two

For each of the following product categories, can you indicate which situation best suits you ? (I buy equally online and offline)
% = difference between 2025 and 2021 results.

Sensory experience and rising costs drive online slowdown

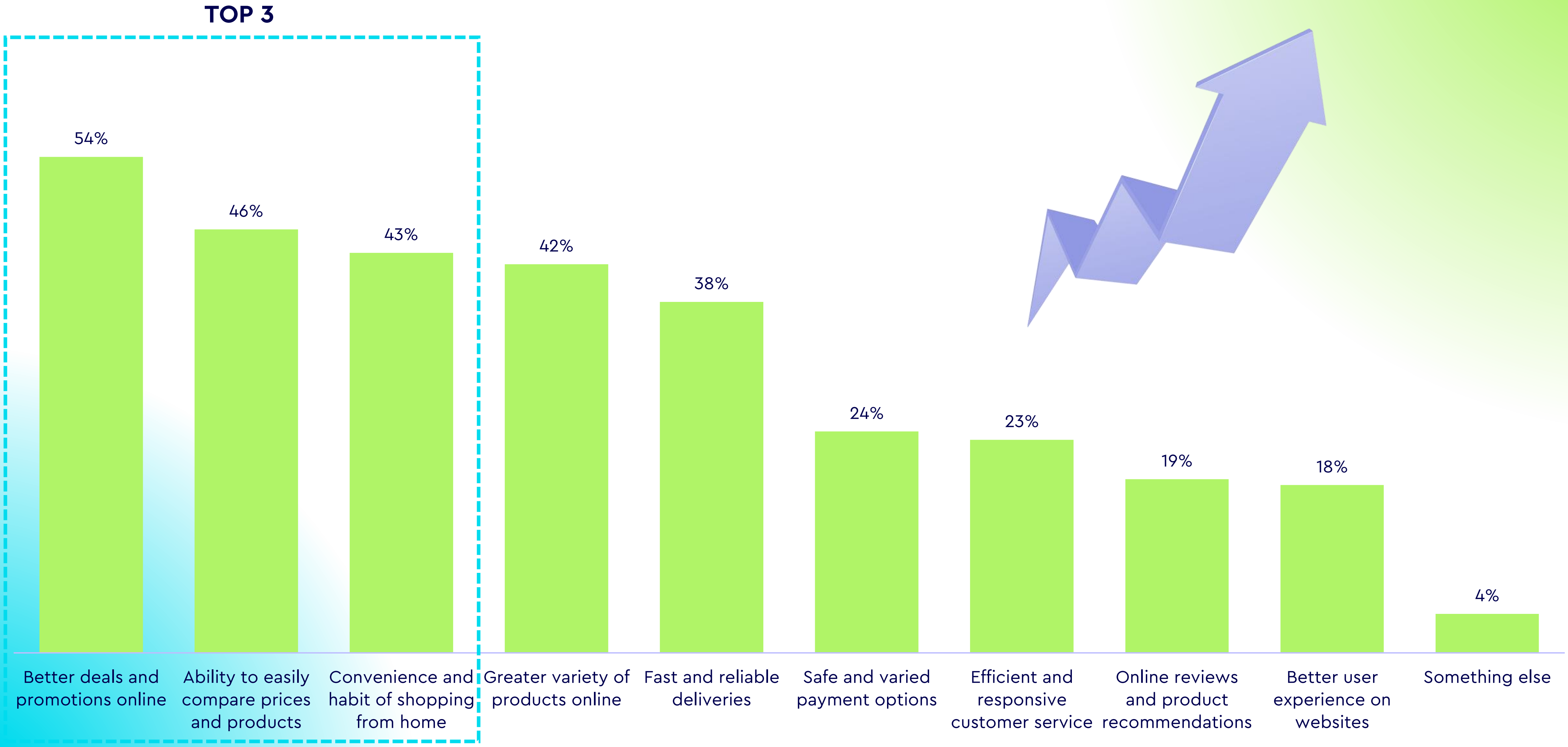
People seek sensory experiences and low-cost delivery options, especially as purchasing power keeps declining



Why do you think you will reduce your online purchases?

* Only account for people who purchase online

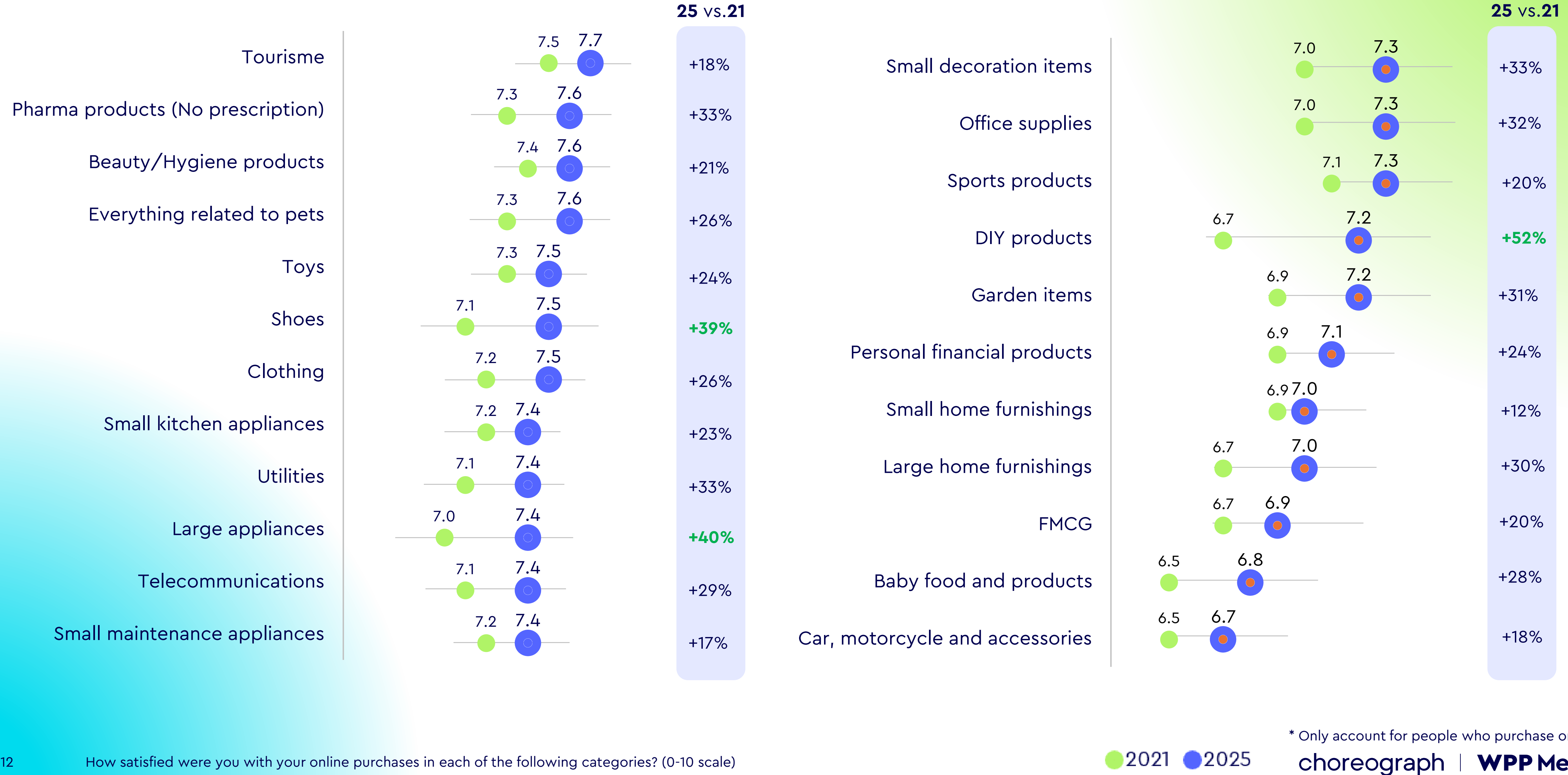
When deals, high choice and comfort power e-commerce growth



Why do you think you will increase your online purchases?

* Only account for people who purchase online

Satisfaction is increasing of 27% on average across all categories since 2021

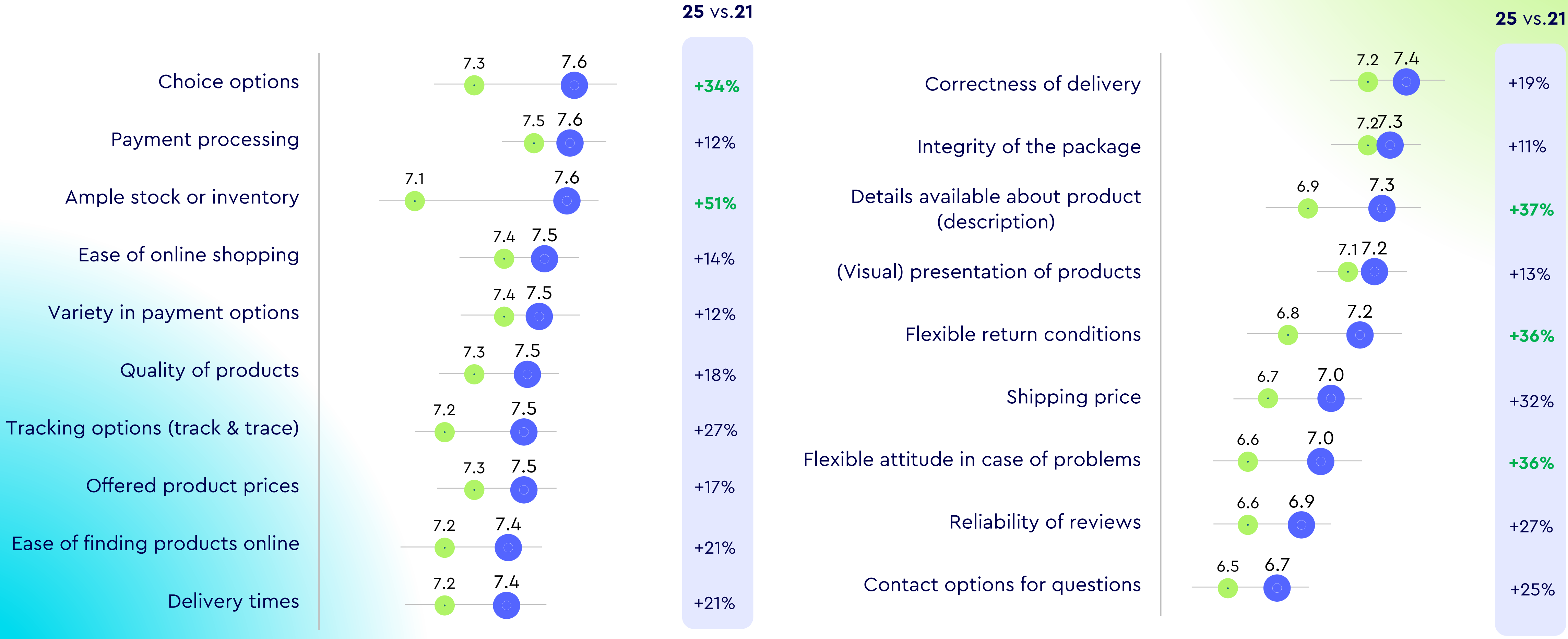


* Only account for people who purchase online

How satisfied were you with your online purchases in each of the following categories? (0-10 scale)

Today, consumers are more satisfied regarding all online shopping assets compared to the past

7.1/10 *2021* Average satisfaction score *2025* **7.3/10**



If we talk about your satisfaction with the various aspects of online shopping, how would you generally rate each of the following aspects? (0-10 Scale)
* Only account for people who purchase online

2021 2025

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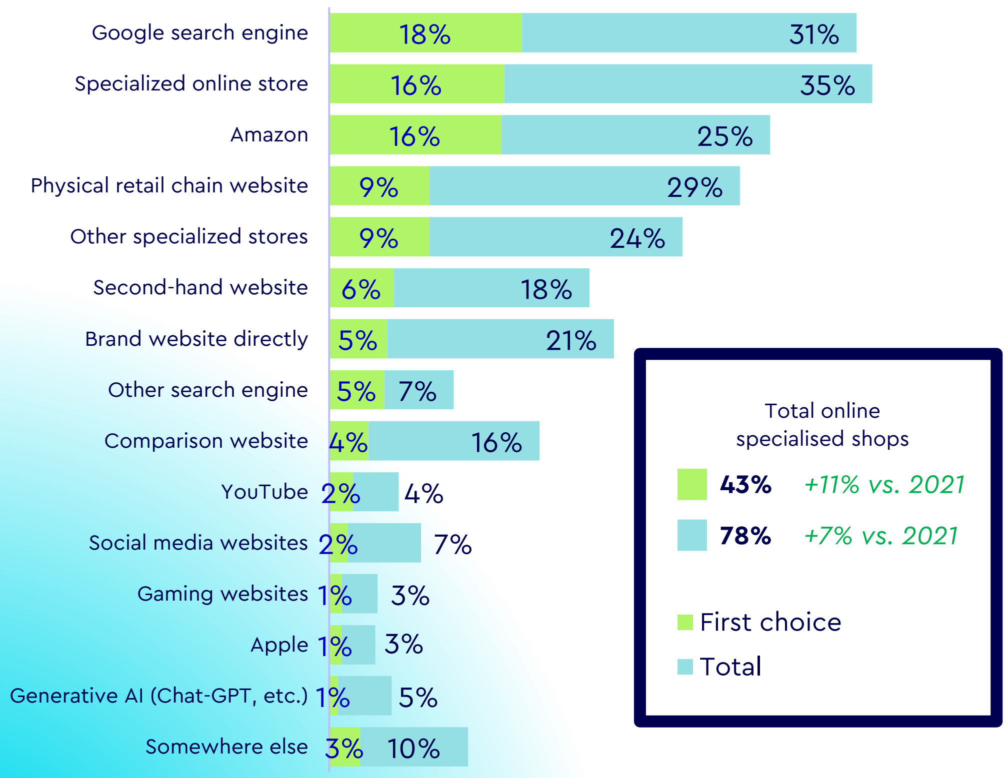
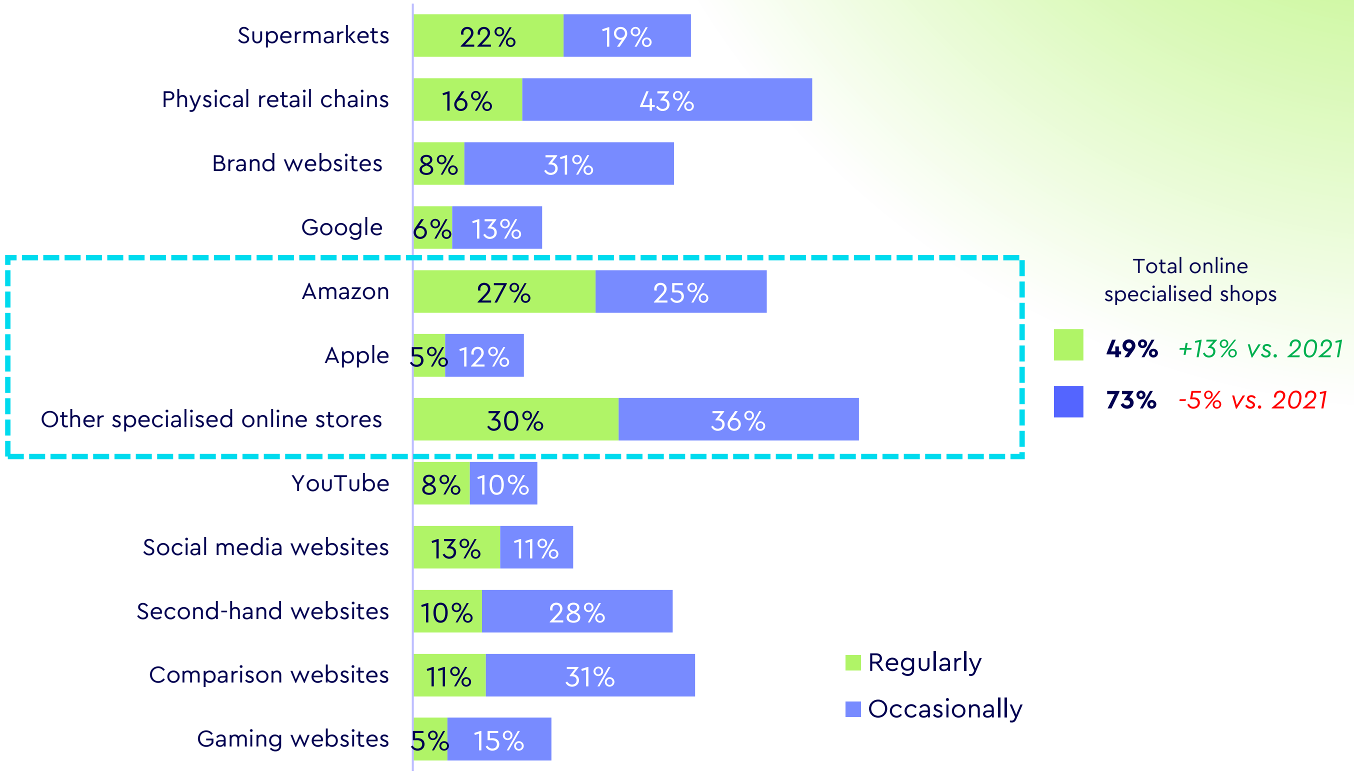
From search to sales : the rise of online specialized shops

Consumers increasingly buy and search through specialized shops, marking some growth since 2021



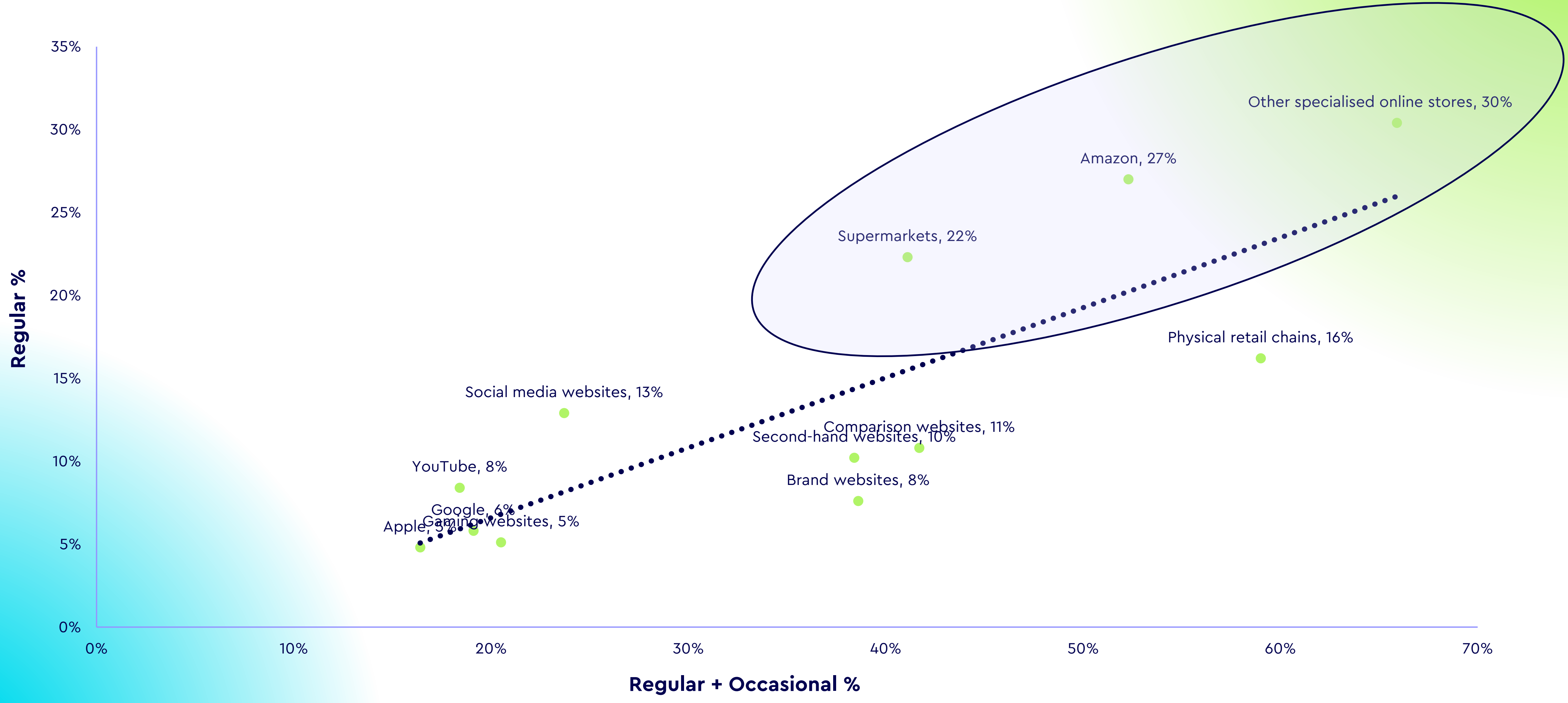


* Only account for people who purchase online

How frequent do you buy products online in following type of online shops ?
If you wish to buy online a product or service, via which sites do you search this product ?

The war of keeping consumers

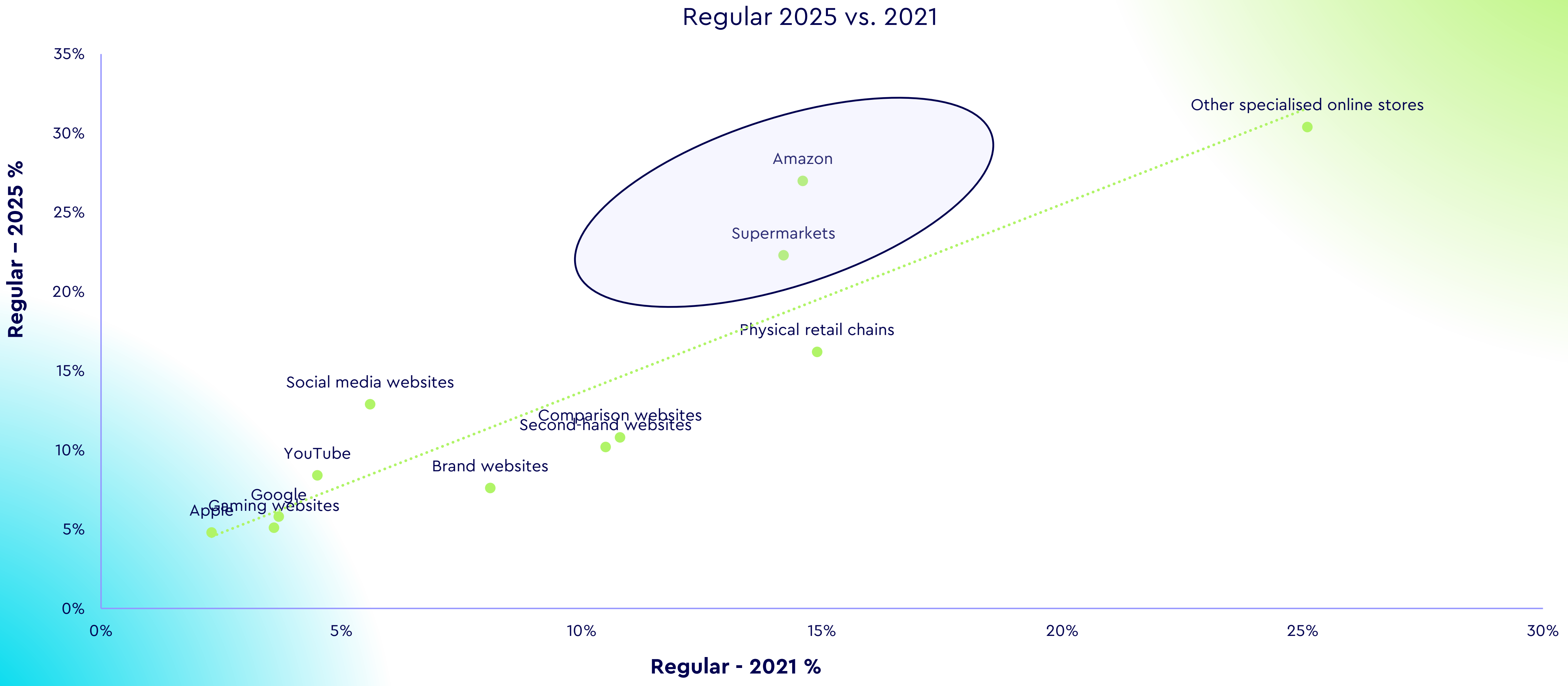
Current consumers come back regularly to the brand they know



How frequent do you buy products online in following type of online shops ?

Regular consumer – core fans

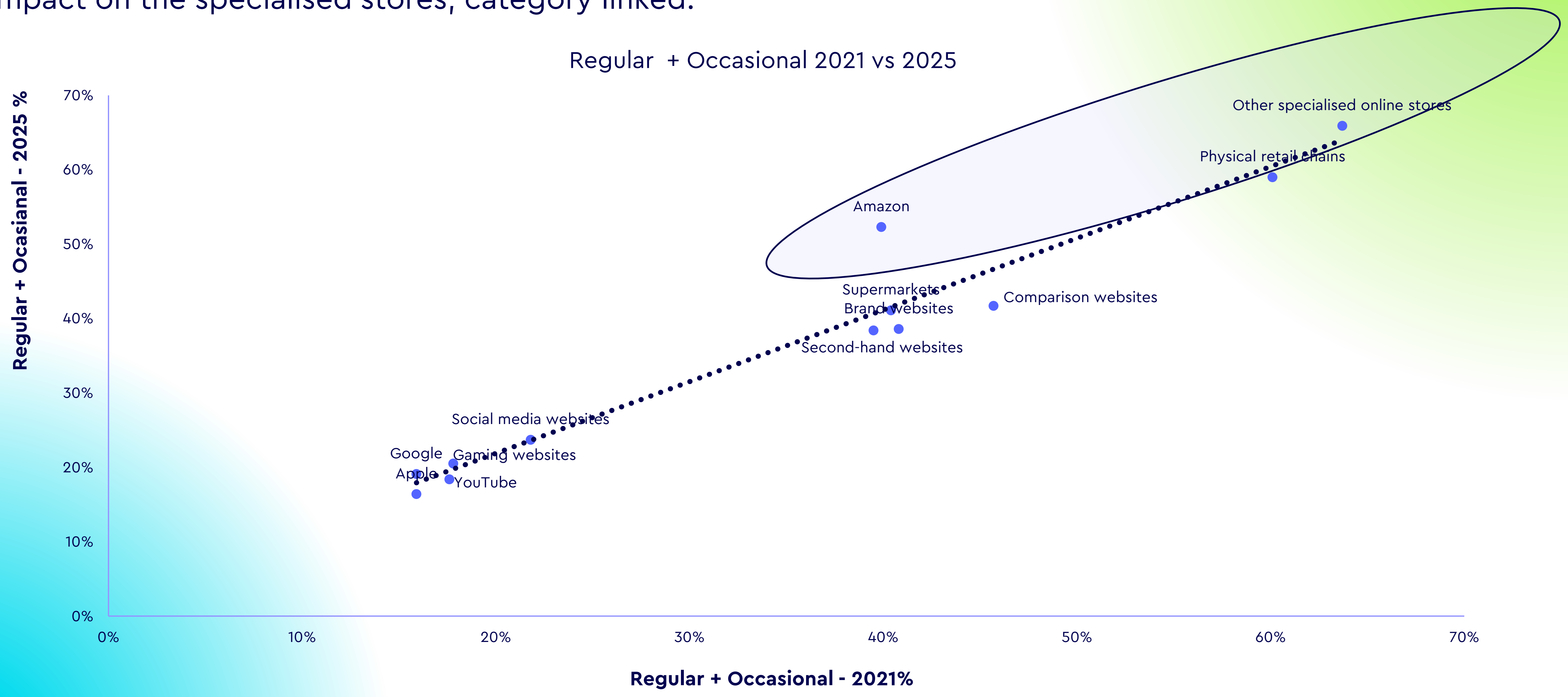
Amazon, Supermarkets & Social Media show the biggest increase of regular consumers



How frequent do you buy products online in following type of online shops ?

Occasional consumers, growth based on occasion

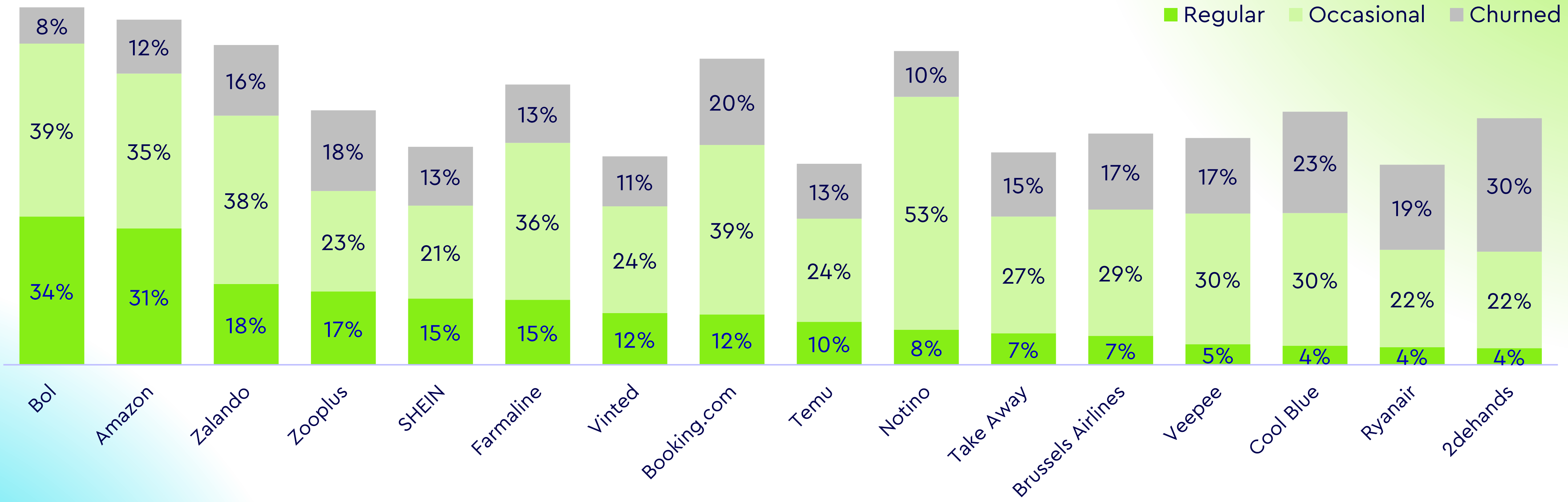
Amazon & Specialised stores show the biggest increase based. Occasionally has a big impact on the specialised stores; category linked.



How frequent do you buy products online in following type of online shops ?

Lots of people still need to be convinced

Some platforms have cut through, but it takes time



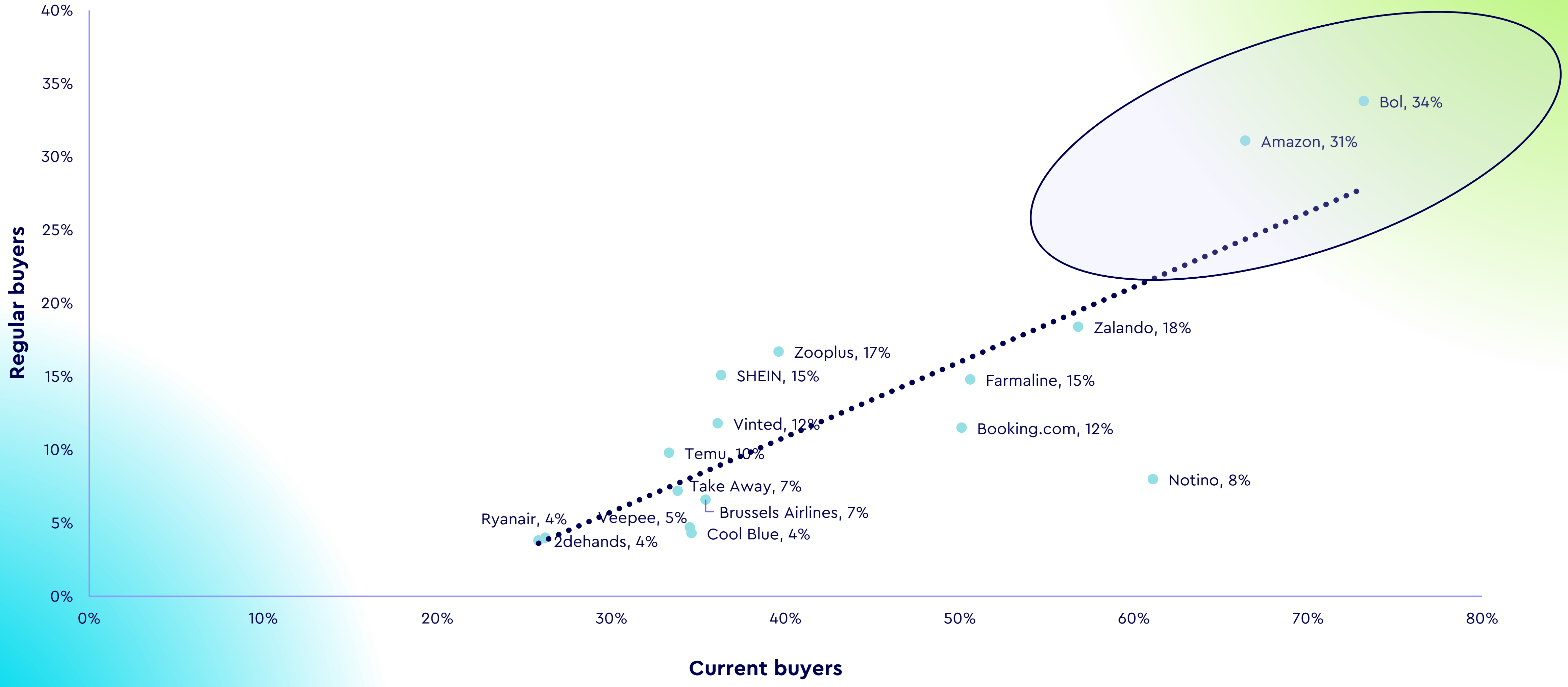
Usage 25 vs. 21	Bol	Amazon	Zalando	Zooplus	SHEIN	Farmaline	Vinted	Booking.com	Temu	Notino	Take Away	Brussels Airlines	Veepee	Cool Blue	Ryanair	2dehands
	+32%	+38%	+27%	+28%	+31%	+26%	+21%	N/A	N/A	N/A	+16%	N/A	+25%	+14%	N/A	+10%

* Only account for people who purchase online

How often do you shop online at each of the following online stores?

Amazon & Bol, clear market leaders

Zalando & Farmaline are on the lookout for more regular consumers



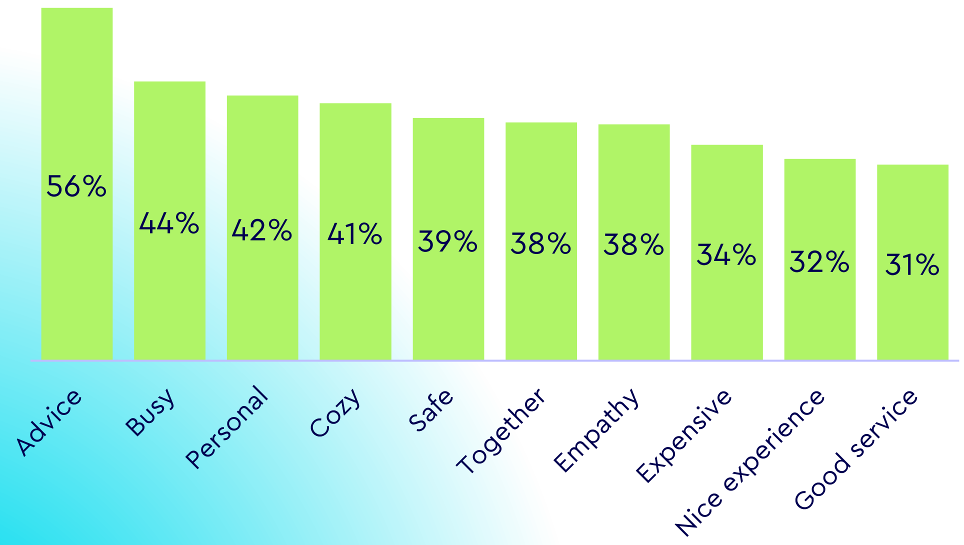
How often do you shop online at each of the following online stores?

* Only account for people who purchase online

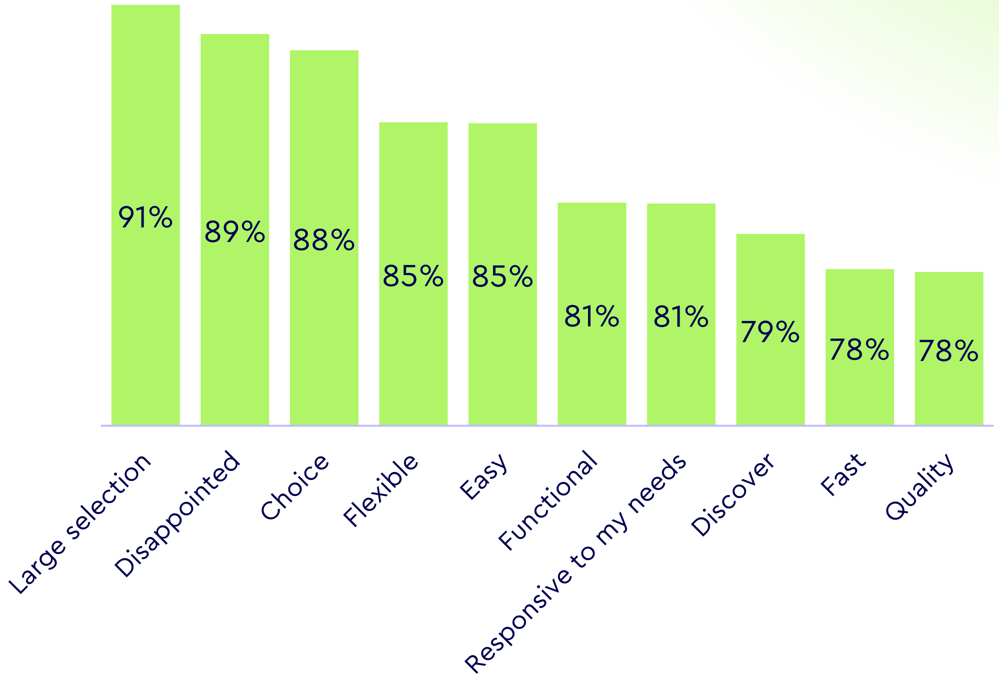
Physical thrive on experience, online wins on convenience

Data reveals a consumer split : tactile in-store engagement versus efficient digital transactions

WHY GO FOR PHYSICAL SHOPPING ?



WHY GO FOR ONLINE SHOPPING ?



You will now see a series of words. For each word, please indicate whether it is more applicable to physical shopping or more closely related to online shopping (0-10 scale).

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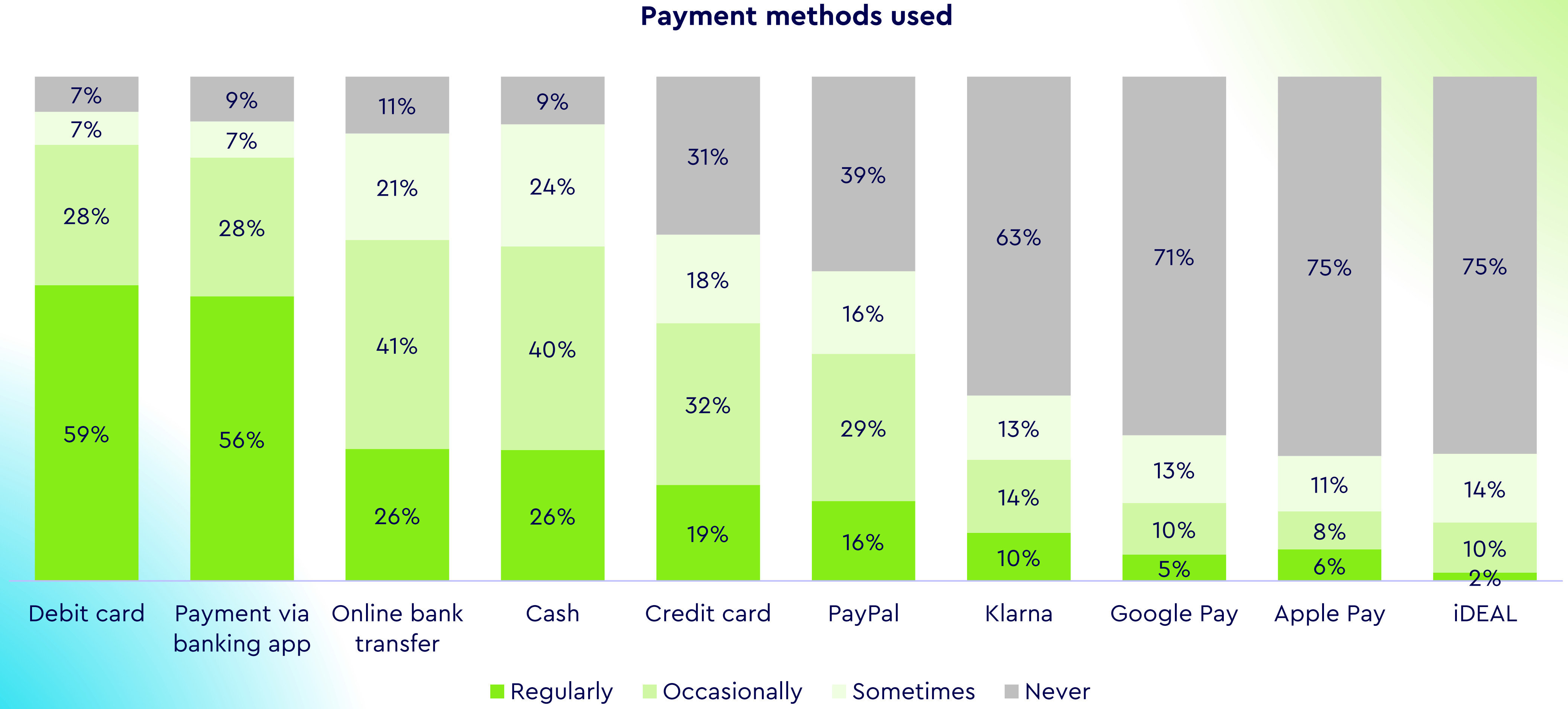
SECTION 02

Paying smart in the digital age

02

Traditional payment methods outpace digital wallet adoption

While cash remaining a strong secondary choice

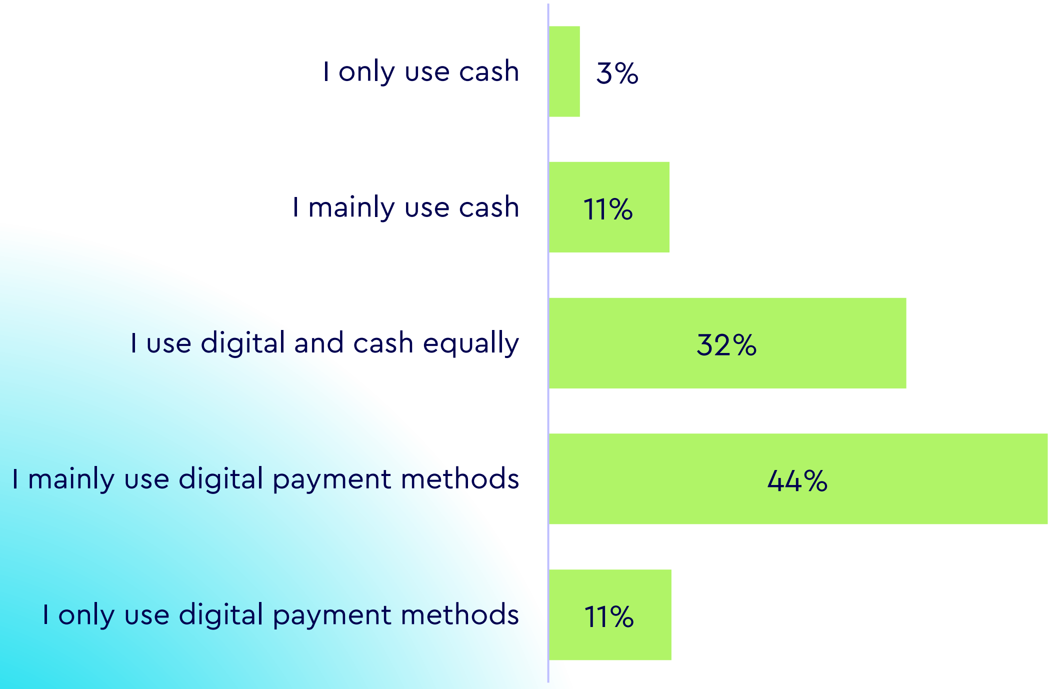


What payment methods do you use for your everyday purchases?

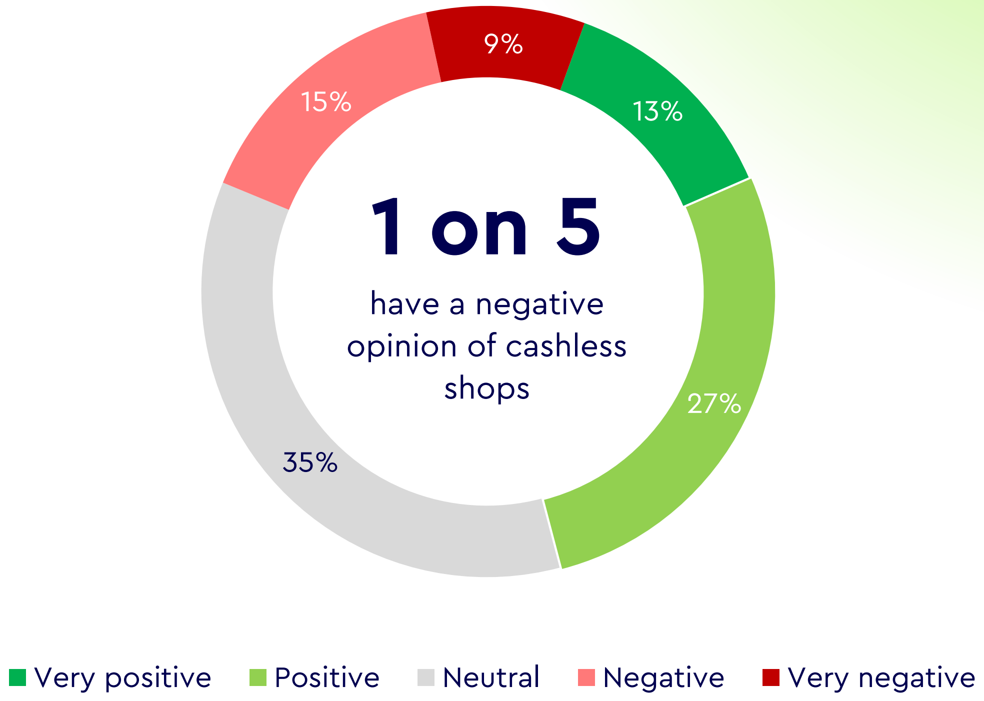
Digital payments are mainstream, cashless stores still divide

Acceptance of fully cashless shopping remains far from universal

How consumers balance digital payments and cash



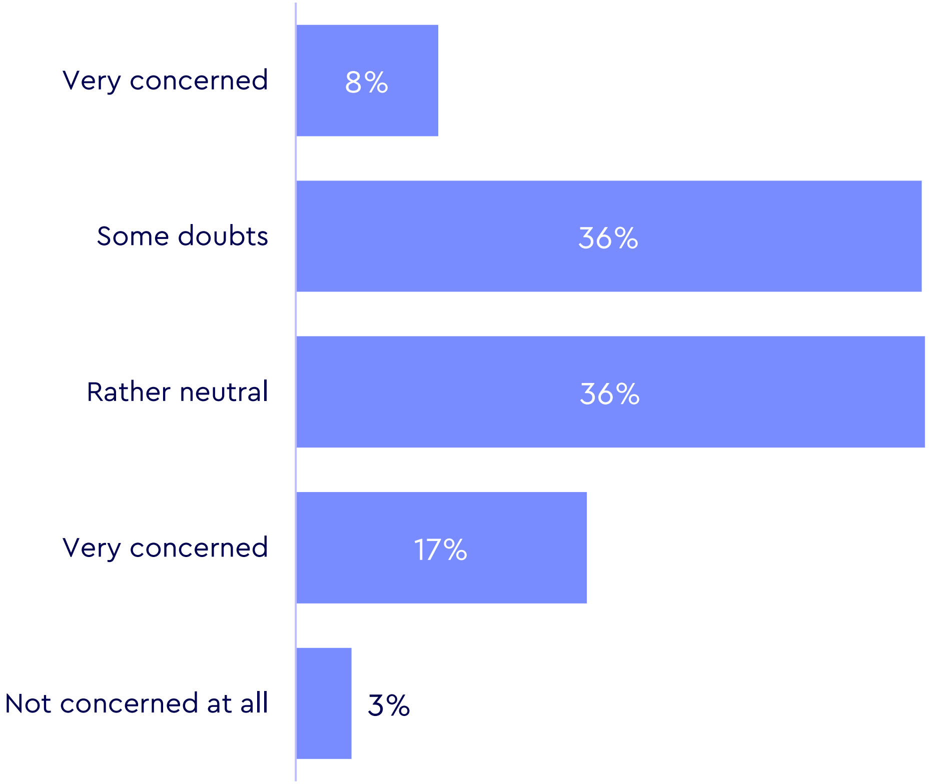
Opinion towards cashless shops



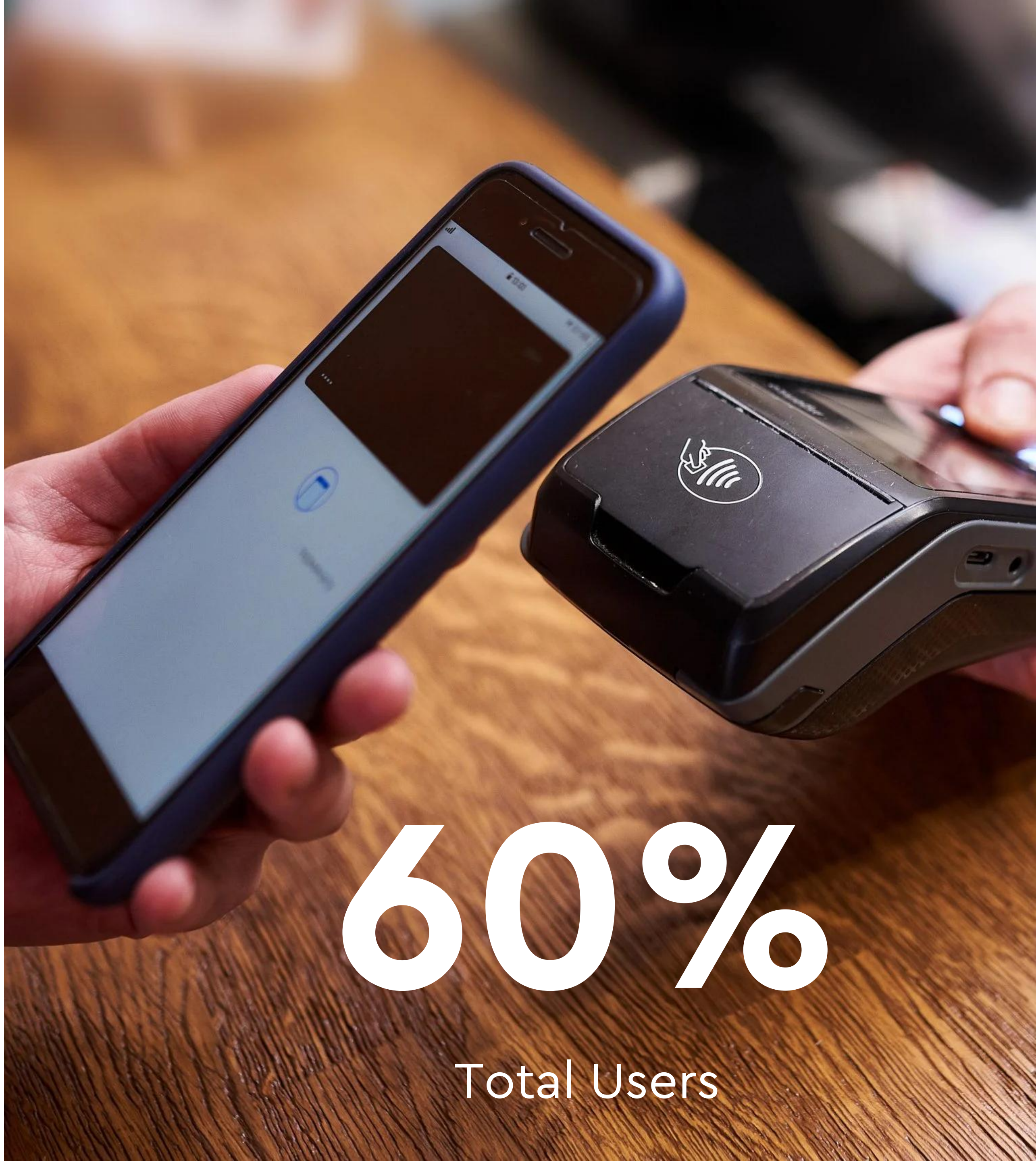
What is your opinion on cashless shops?
How often do you use digital payment methods compared to traditional cash?

Security concerns still shadow digital wallet adoption

Even with rising usage, trust gaps around fraud, privacy and data protection persist



Do you have any concerns about the security of digital wallets?
Do you currently use a digital wallet for your daily transactions?
Digital wallet = is a secure app for storing and using electronic payment methods



SECTION 03

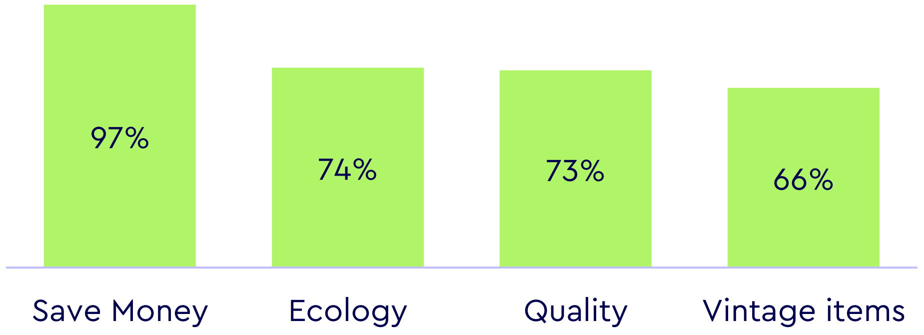
Re-commerce as a driver of sustainable consumer choices

03

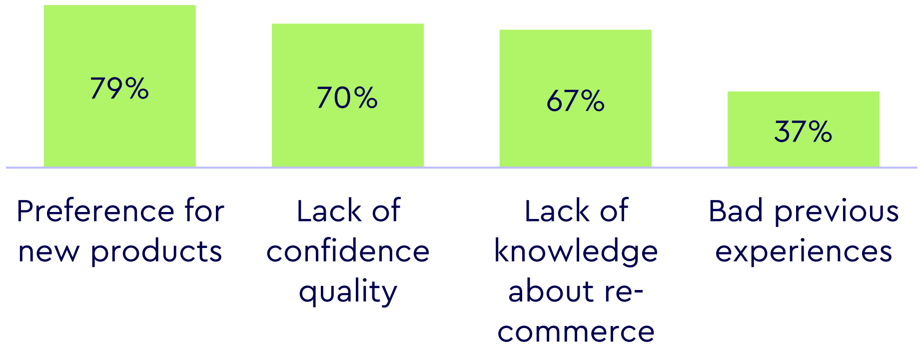
From thrift shops to clicks : the second-hand shift

With 65% buying pre-owned goods, motivations focus on value and sustainability, yet need of new products and quality concerns slow online growth

Why buying clothes from second-hand ?



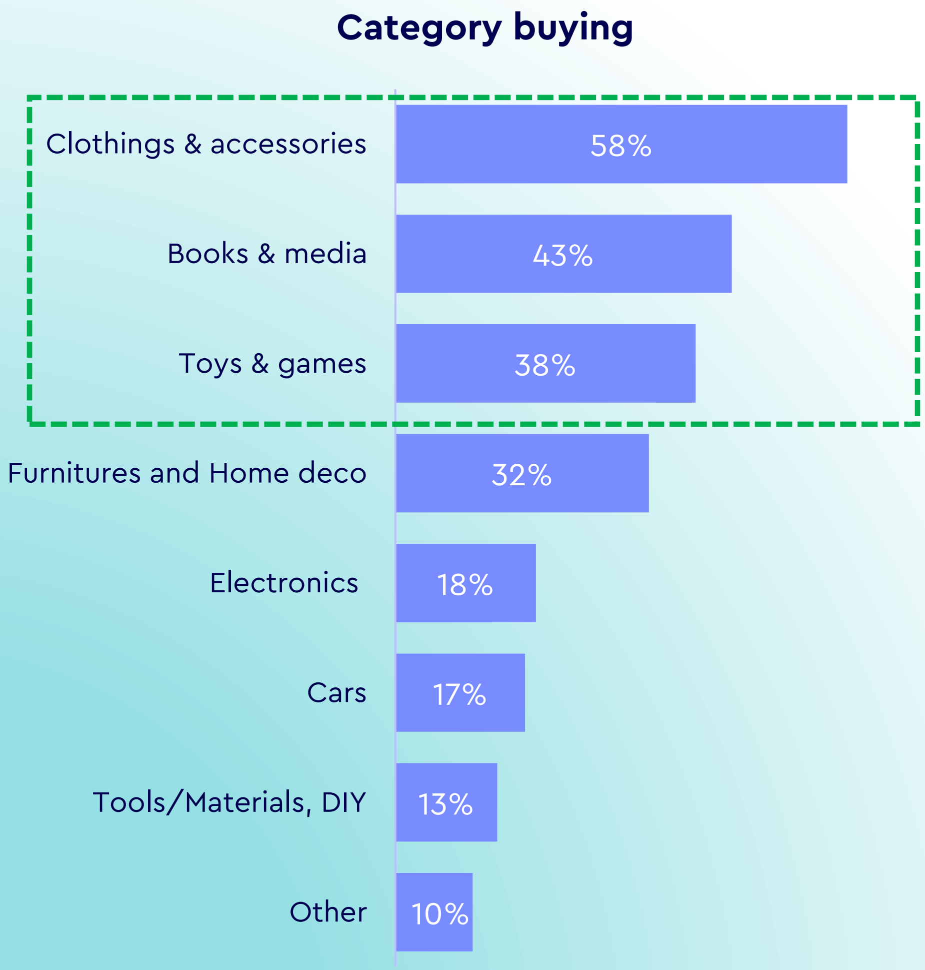
Why NOT buying second-hand products ?

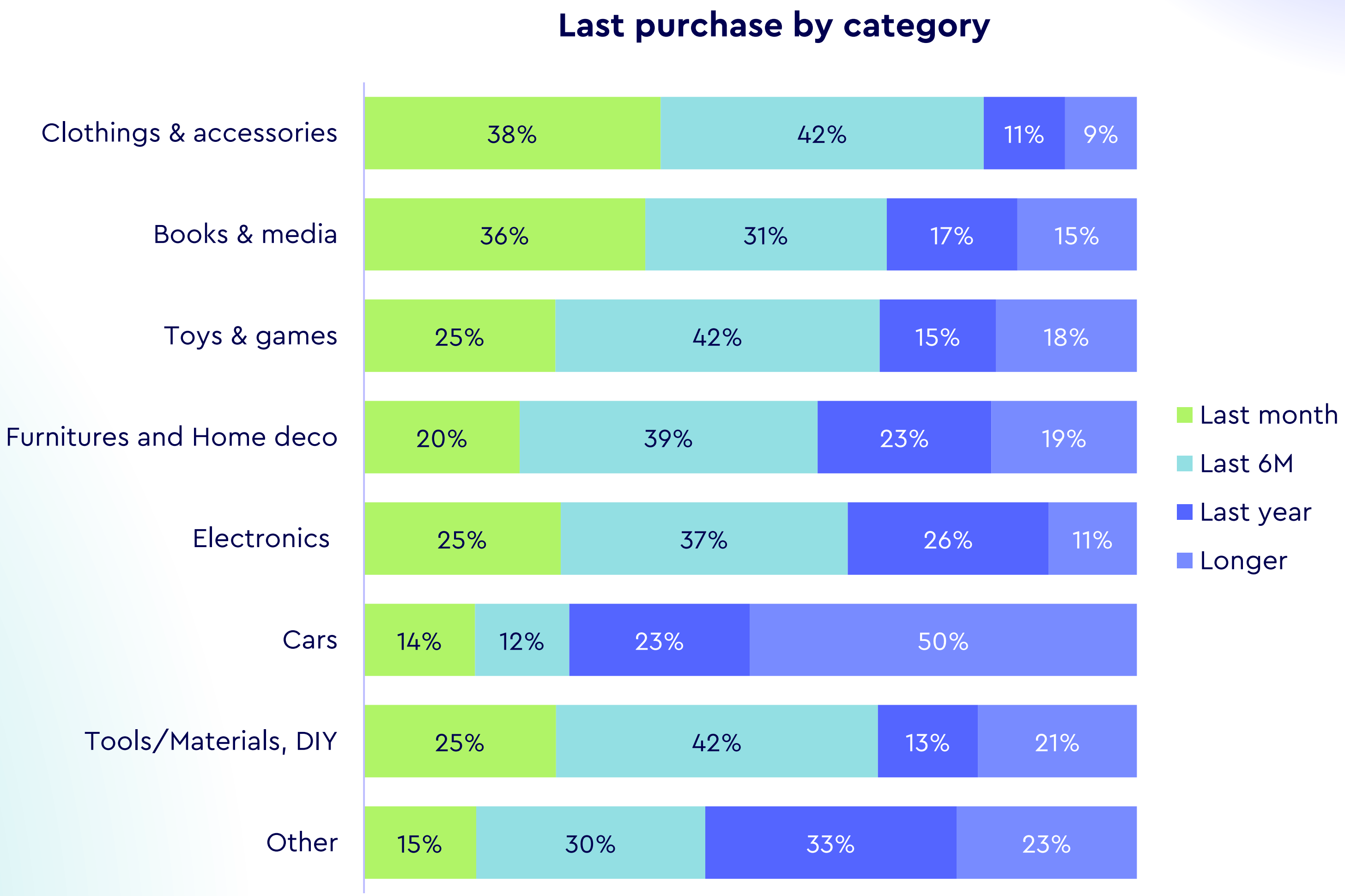


Have you ever bought second-hand items?
You mentioned buying second-hand clothes, so why do you buy from re-commerce platforms?
You have indicated that you do not (yet) purchase second-hand goods via online re-commerce platforms, why ?

Fashion leads the second-hand market

Apparel leads followed by books, media and toys, while electronics, books, cars and DYI or materials are lagging behind

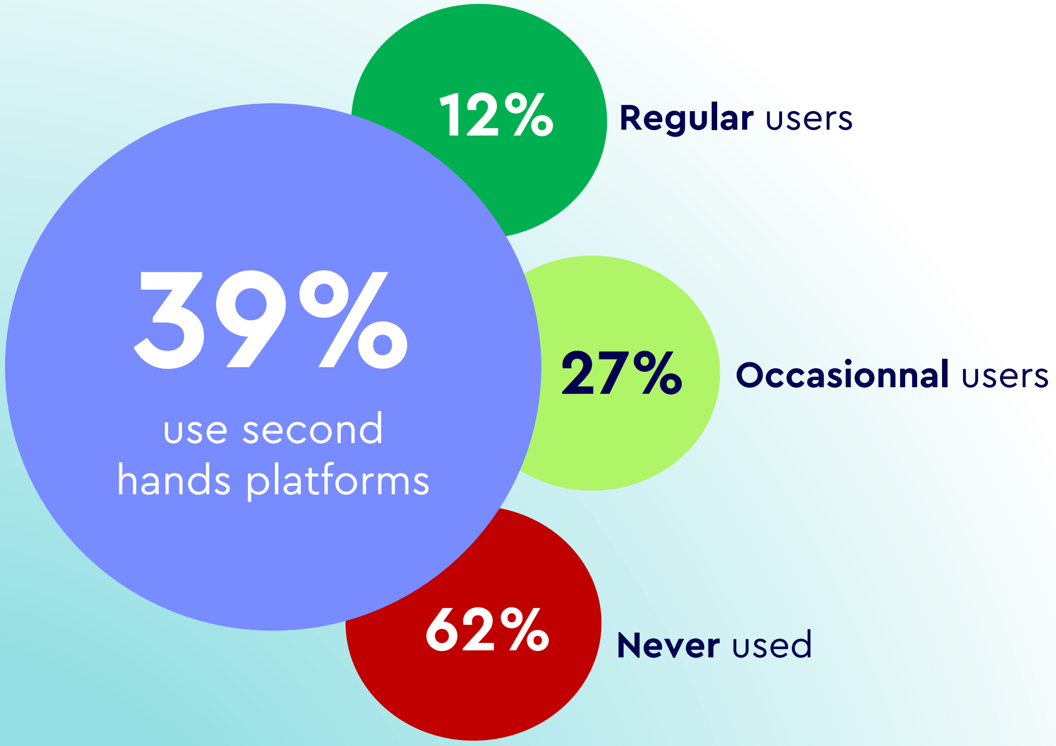




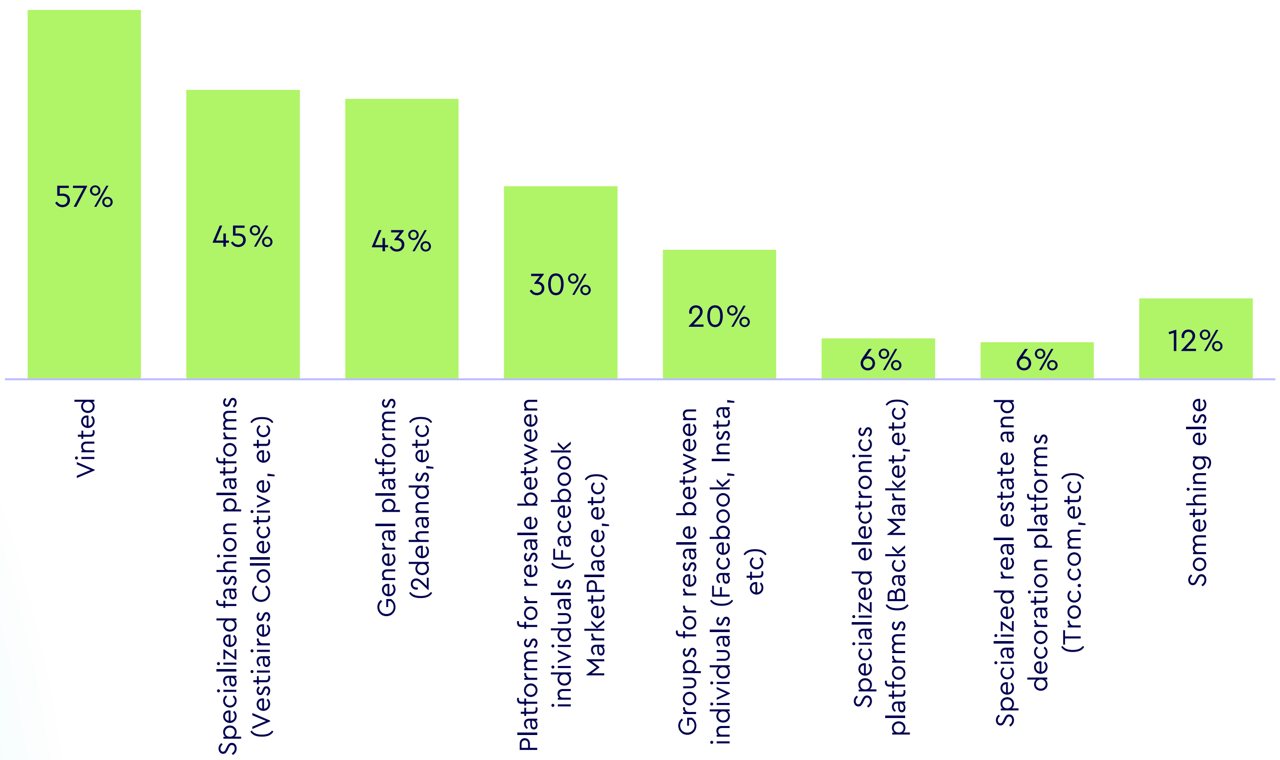
For which of these category of products do you already bought second-hand products ?
For each of the categories you selected, when did you last purchase these products?

Vinted leads the second-hand platform market

Usage reach 39%, driven by Vinted's dominance, specialized sites and general platforms trail, with Facebook Marketplace in 4th



Type of platforms used to buy second-hands products

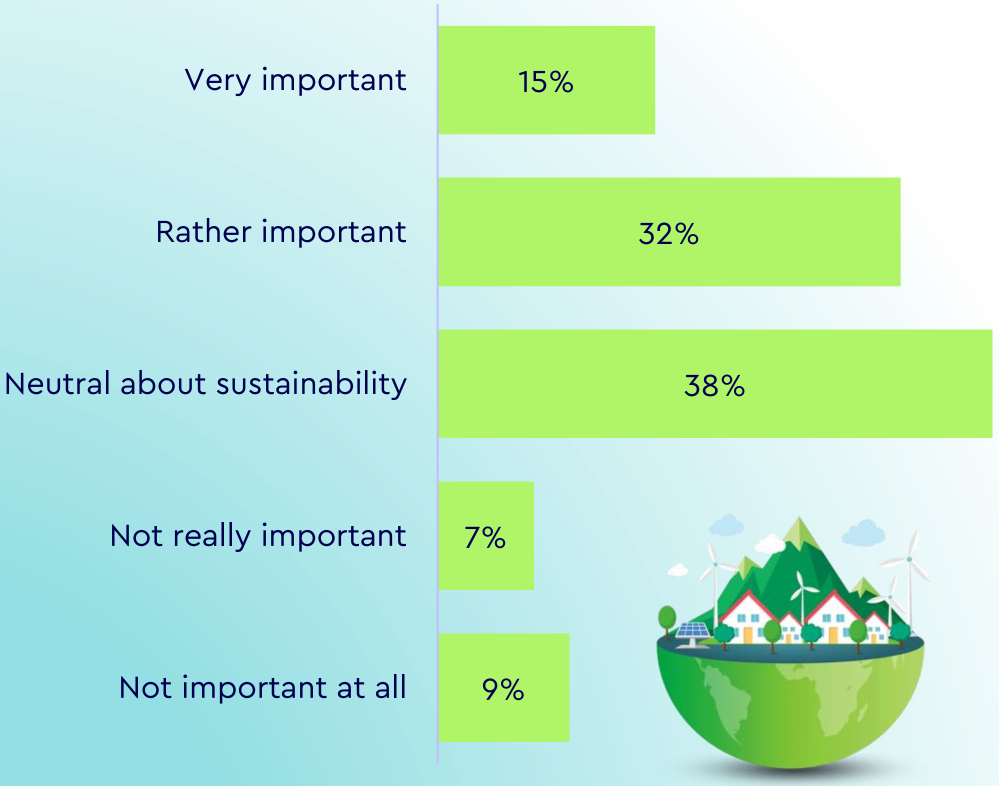


Have you ever purchased items on re-commerce platforms?
What type of shop do you use for your second-hand purchases?

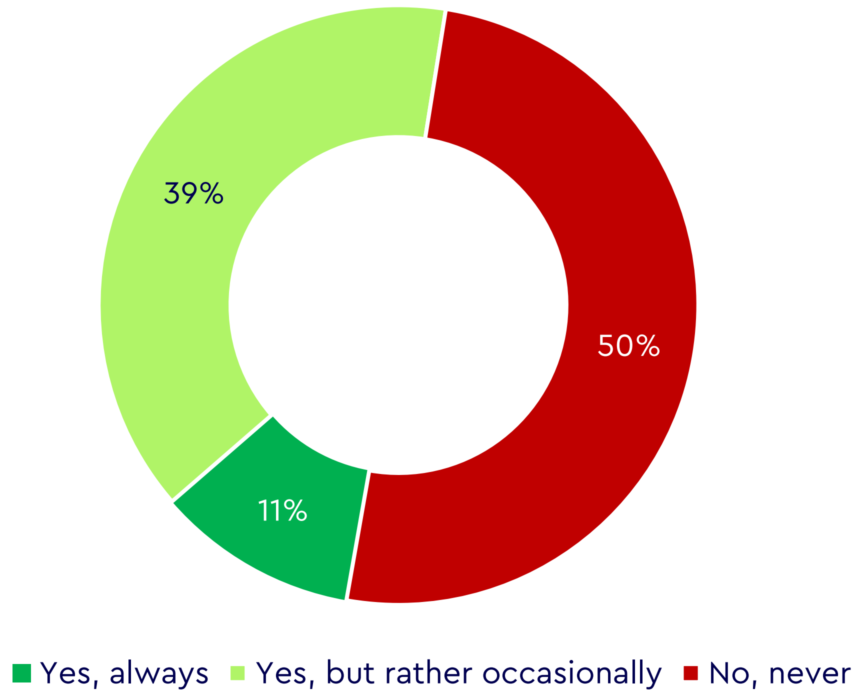
Sustainability is on the radar, but price sensitivity persists

Durability is valued in online shopping by 47%, but converting intent into paid green delivery choices requires overcoming cost barriers

Importance of environmental protection in online shopping



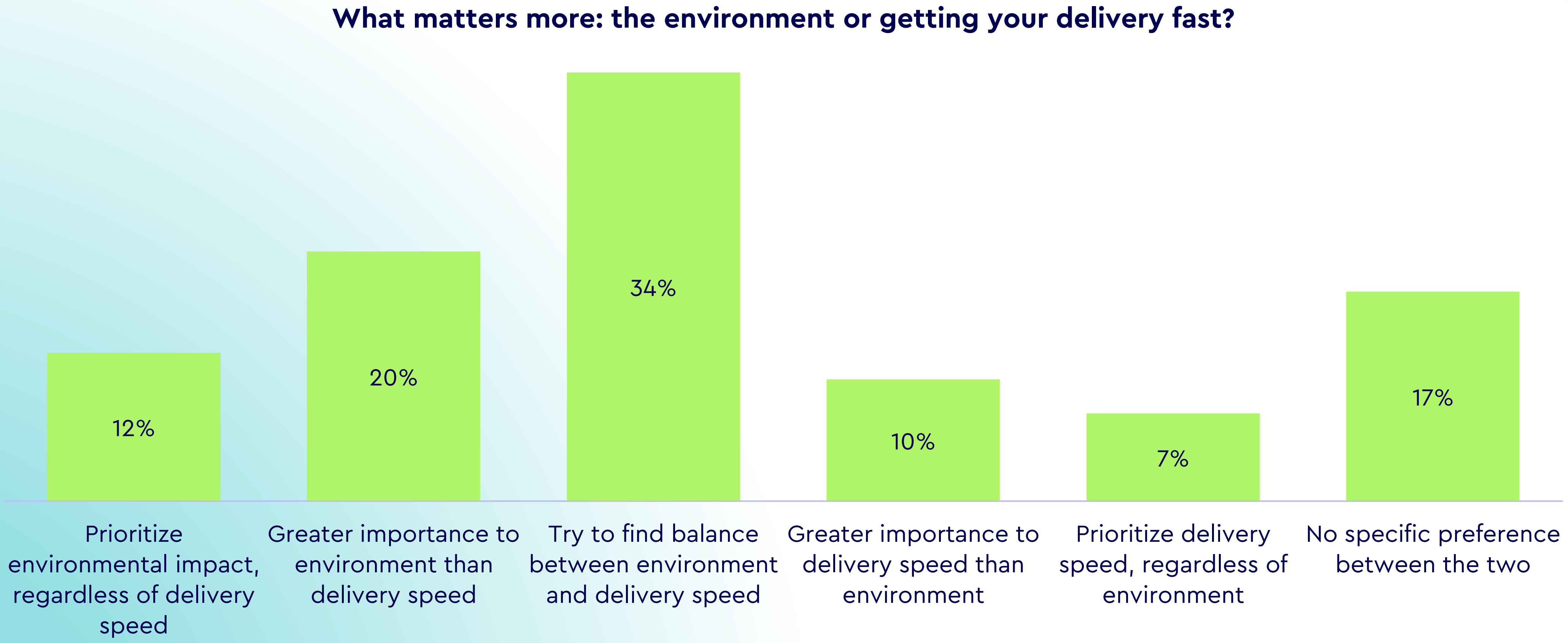
Willingness to pay for eco-friendly delivery



What do you think about the importance of environmental protection and sustainable development in online shopping?
Would you be willing to pay extra for more environmentally friendly delivery ?

Balancing green values with delivery speed

The challenge for ecommerce is to meet sustainability goals without scarifying convenience



How do you balance the environmental impact associated with e-commerce with the convenience of fast delivery services?

SECTION 04

The future is intelligent

04

Quick reminder

Worlds are blending, no more separate ways of buying

91%

Webrooming

+20% points
vs. 2021

80%

Showrooming

+41% points
vs. 2021

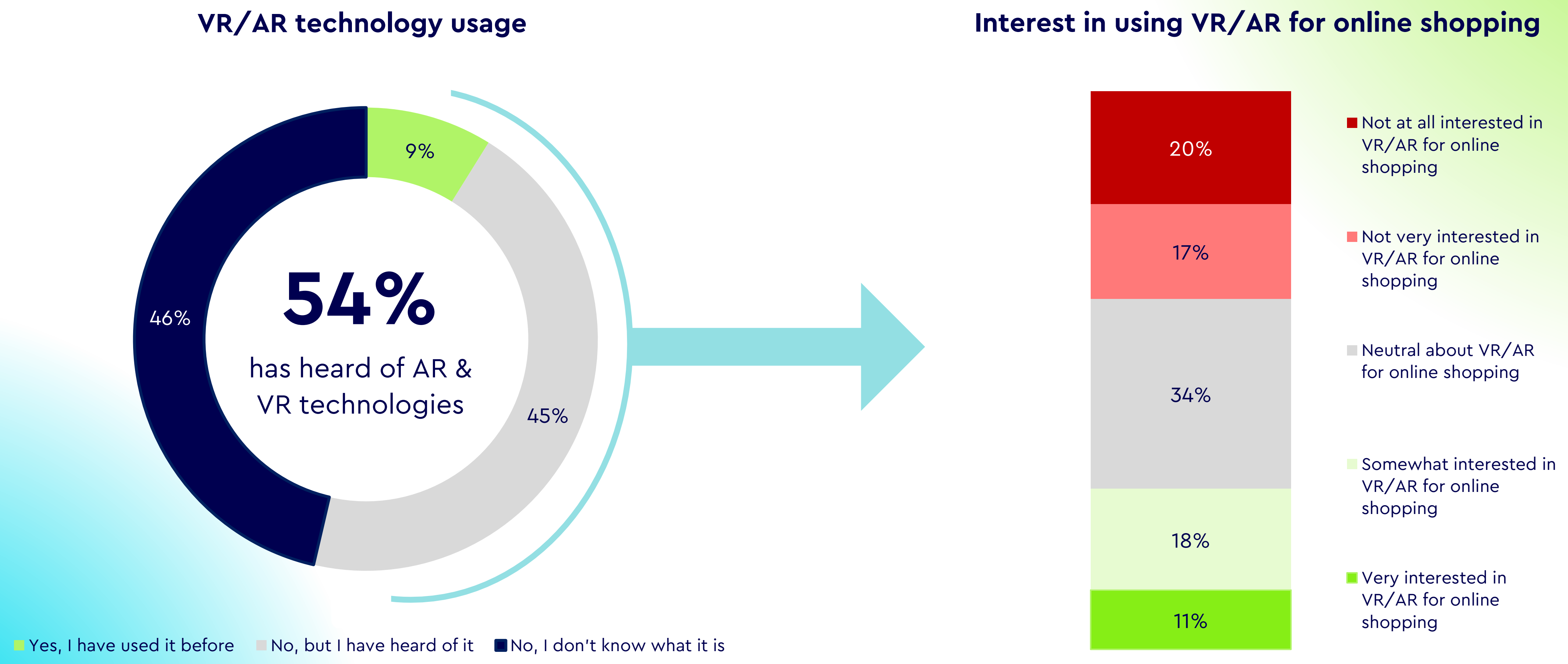
74%

Smartphone usage in-store for comparison

+14% points
vs. 2021

AR & VR in all if this?

There is some interest, but people are not enthusiastic about it

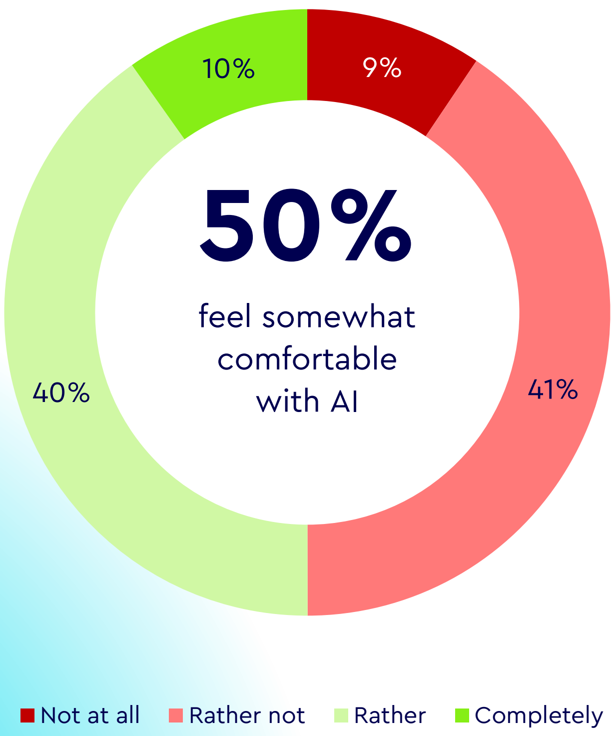


Have you ever used this type of technology (Apple Vision Pro, VR headset, etc.) ?
To what extent are you interested in using such technologies for your online purchases?

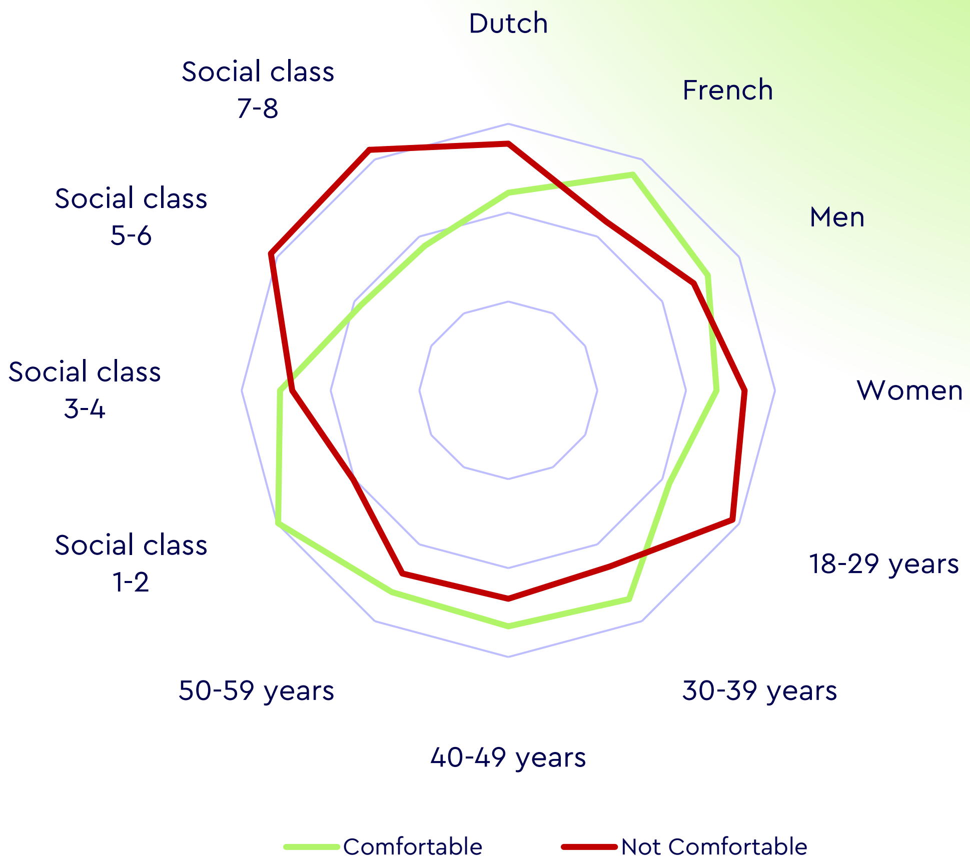
It's all about AI, isn't it?

Still some ways ahead for people to get comfortable with AI

Comfort with AI assistance during online shopping



What's the profile?

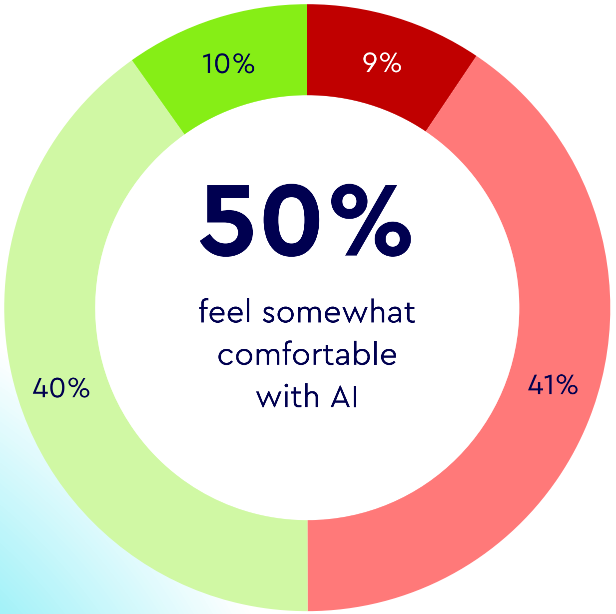


How comfortable are you with using AI to guide you through your online purchases?

It's all about AI, isn't it?

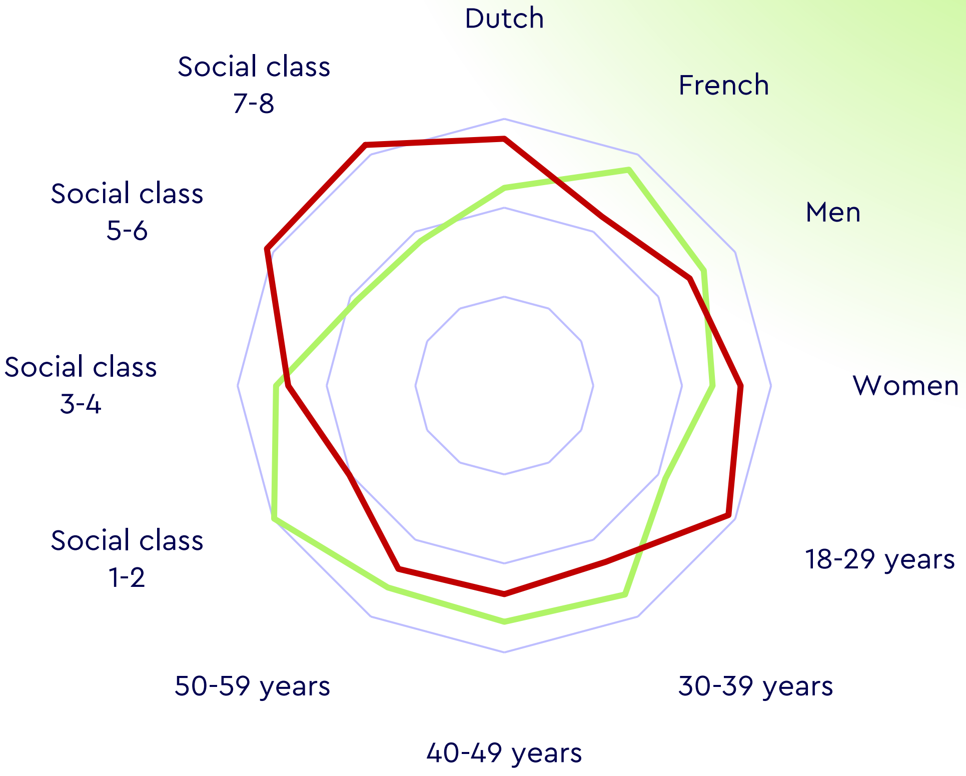
Still some ways ahead for people to get comfortable with AI

Comfort with AI assistance during online shopping



Not at all | Rather not | Rather | Completely

What's the profile?



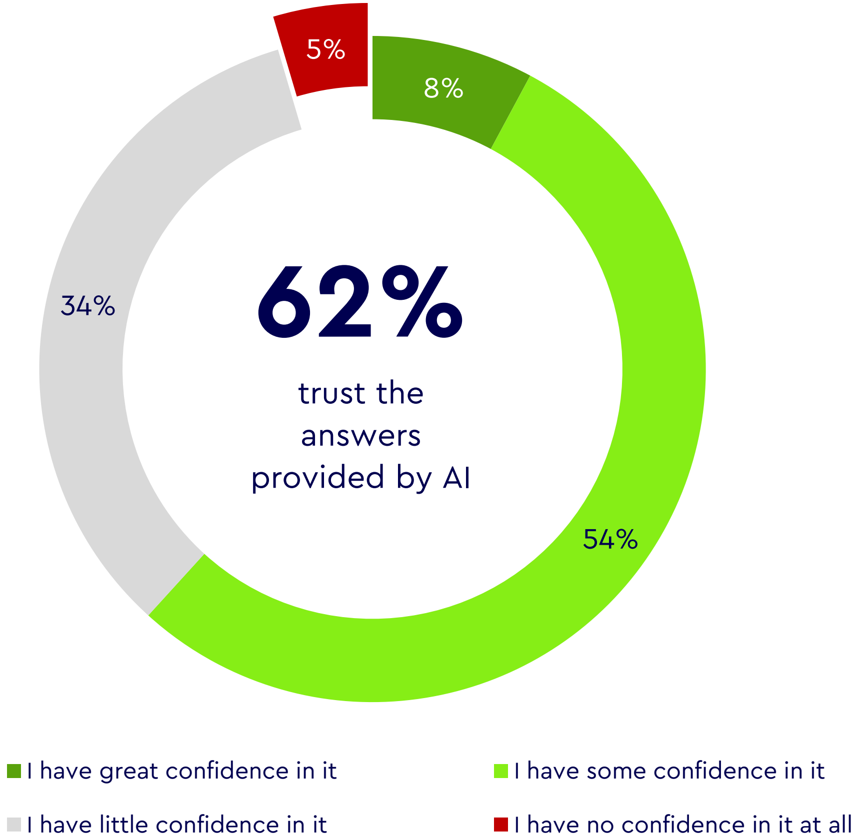
Comfortable | Not Comfortable

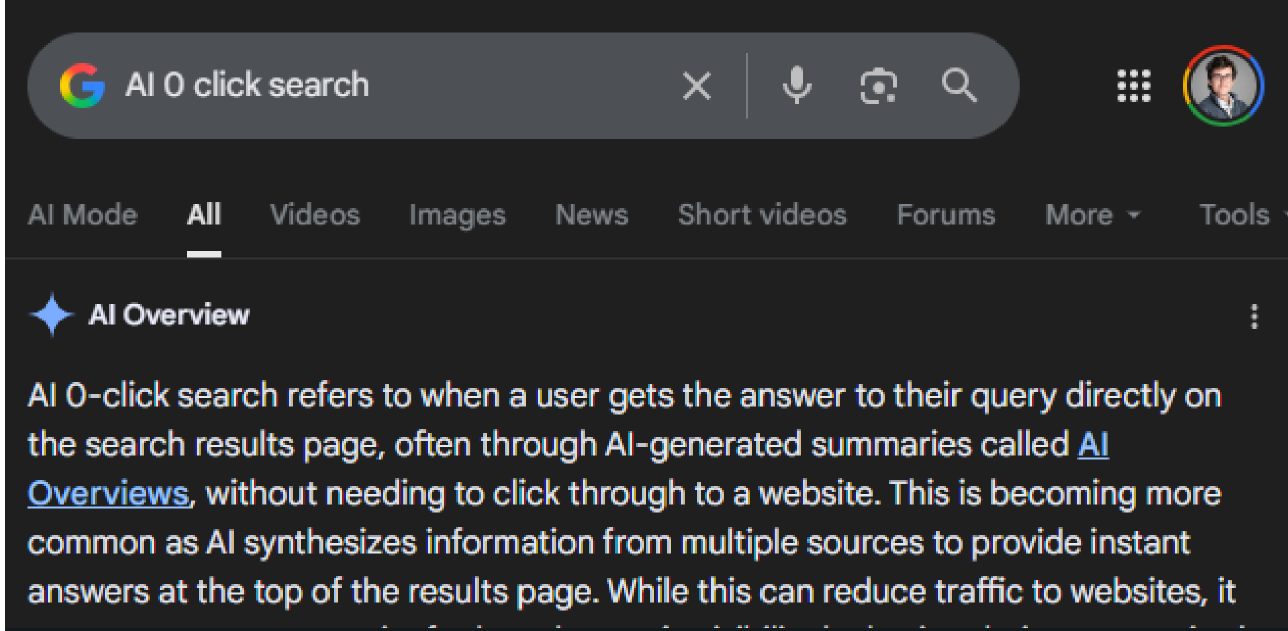
How comfortable are you with using AI to guide you through your online purchases?

AI in the search process

It's becoming the search process – SEO to GEO for brands

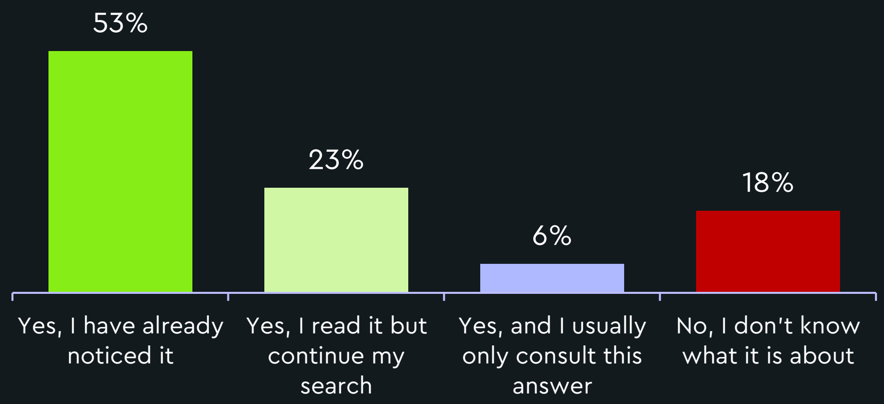
Trust in AI provided answers





82%

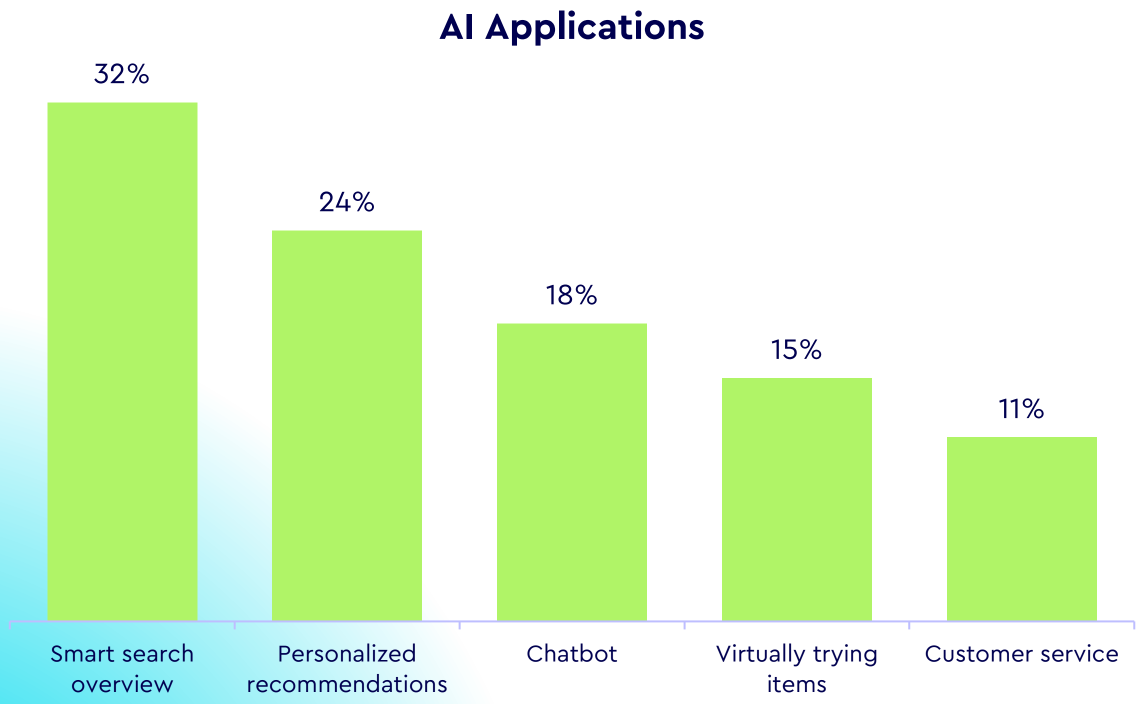
Have noticed the AI-formulated answers when searching

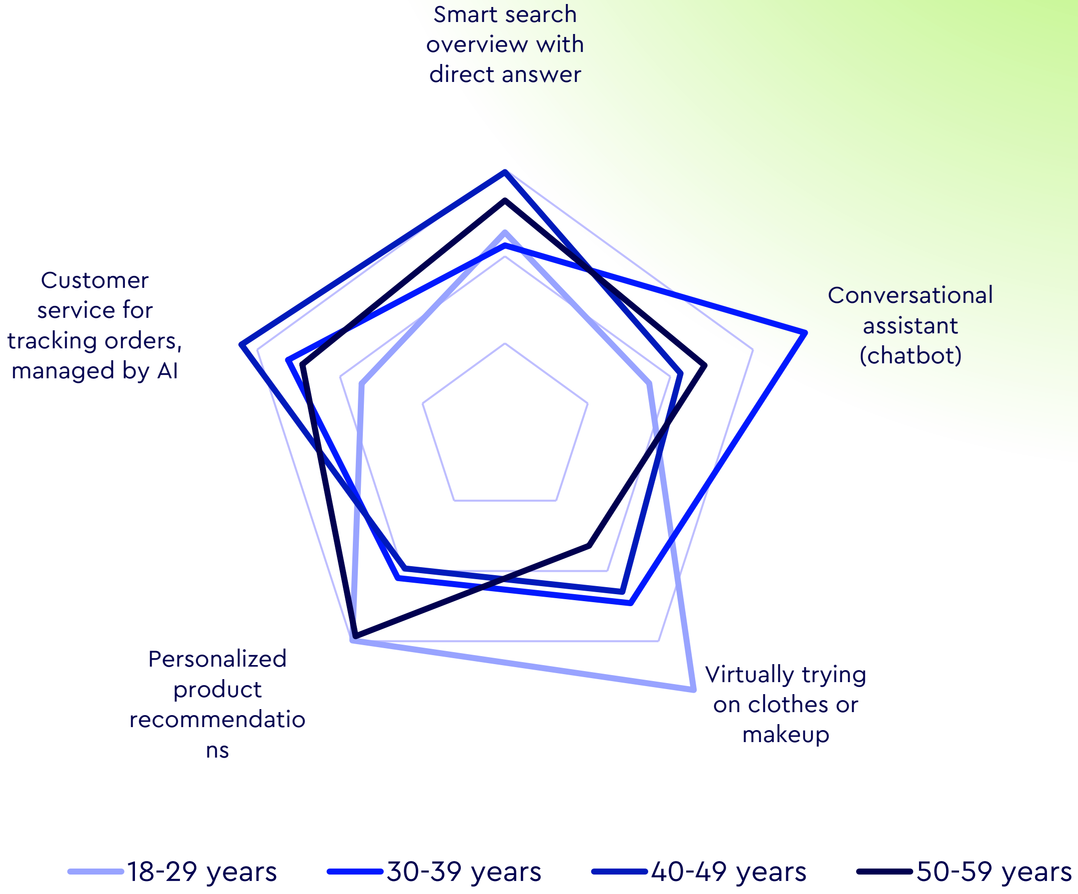


When you use a search engine such as Google or another, have you noticed that it offers you text generated by artificial intelligence in response to your query without first offering you a link on the page? To what extent do you trust the answer you are given?

AI in practice

Smart search and personal recommendations, but each age group wants something different





Which of the following AI-based features do you think is most useful when shopping online?

SECTION 05

Perceptions & behaviors in the age of Influence

05

The potential reach of influencers

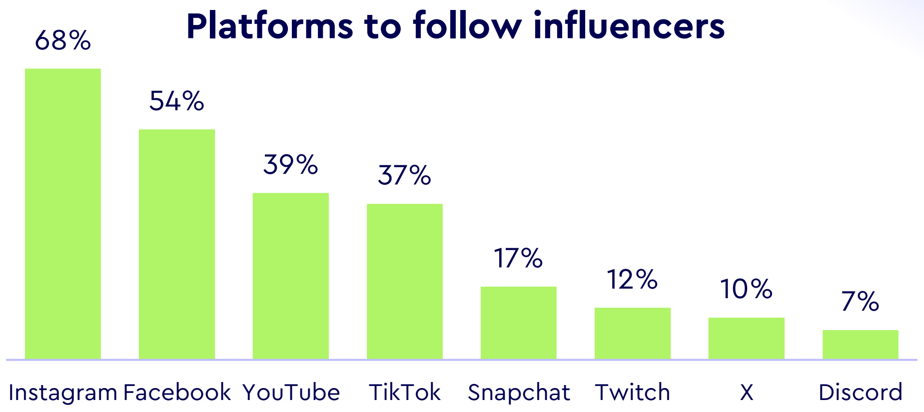
Their influence on those who follow them is strong

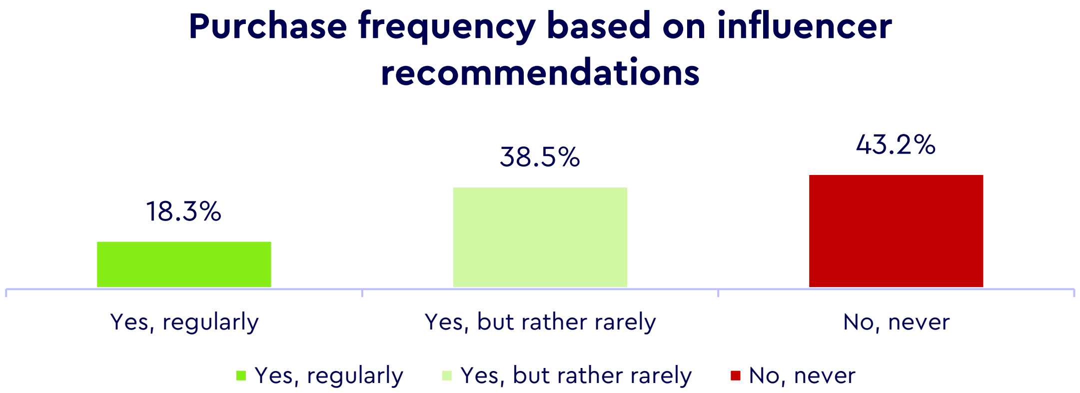
44%
Follows influencers

4 Platforms on which they follow influencers

57% Buy based on recommendation

+52% Compared to 2021



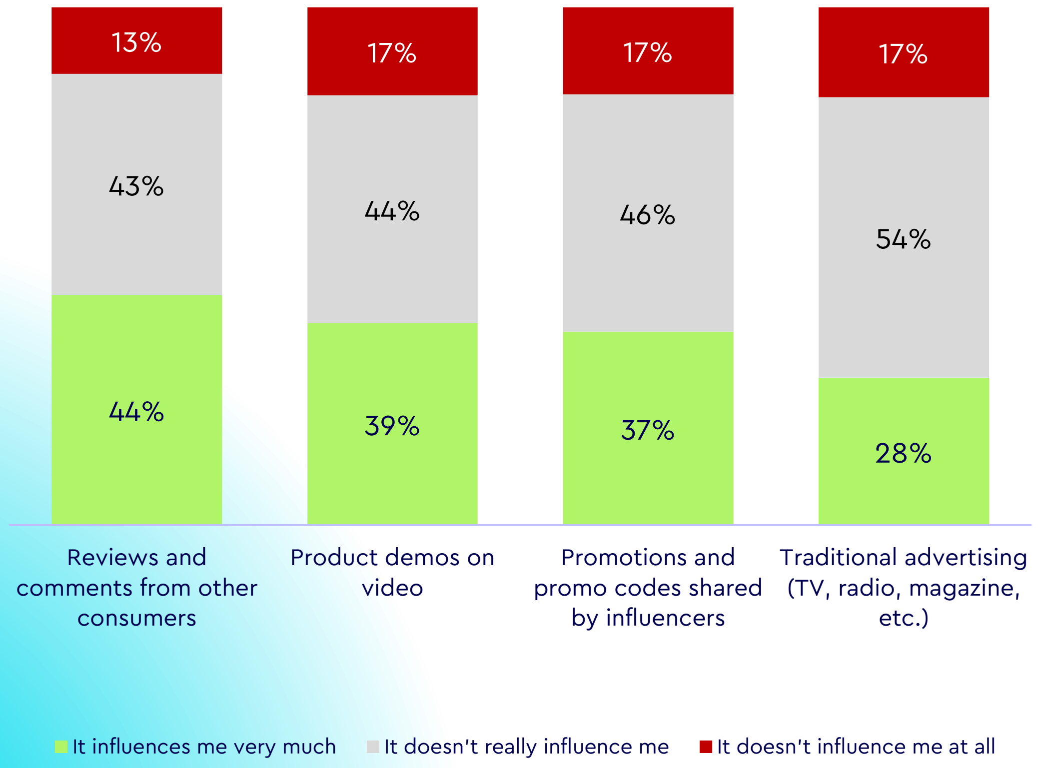


On which platforms do you follow influencers?
Do you ever buy products online after seeing them recommended by an influencer, i.e., a person who recommends certain products or experiences (with or without payment) to their audience on social media?

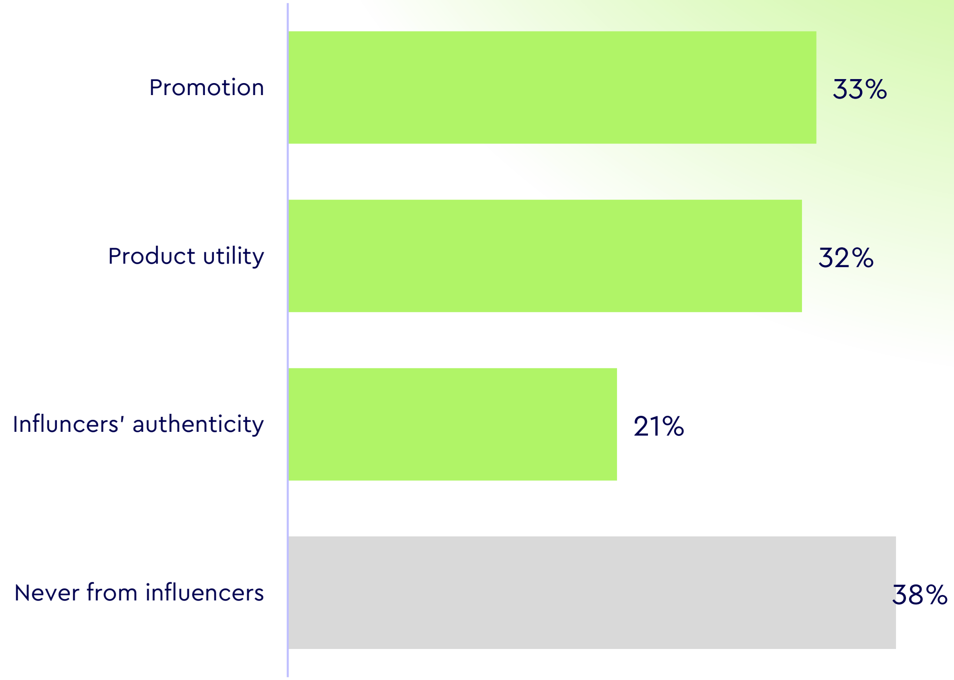
Influencers or promo dealers?

The influencers' impact also explains itself by the promo they offer to their followers

Influential impact per type of contact



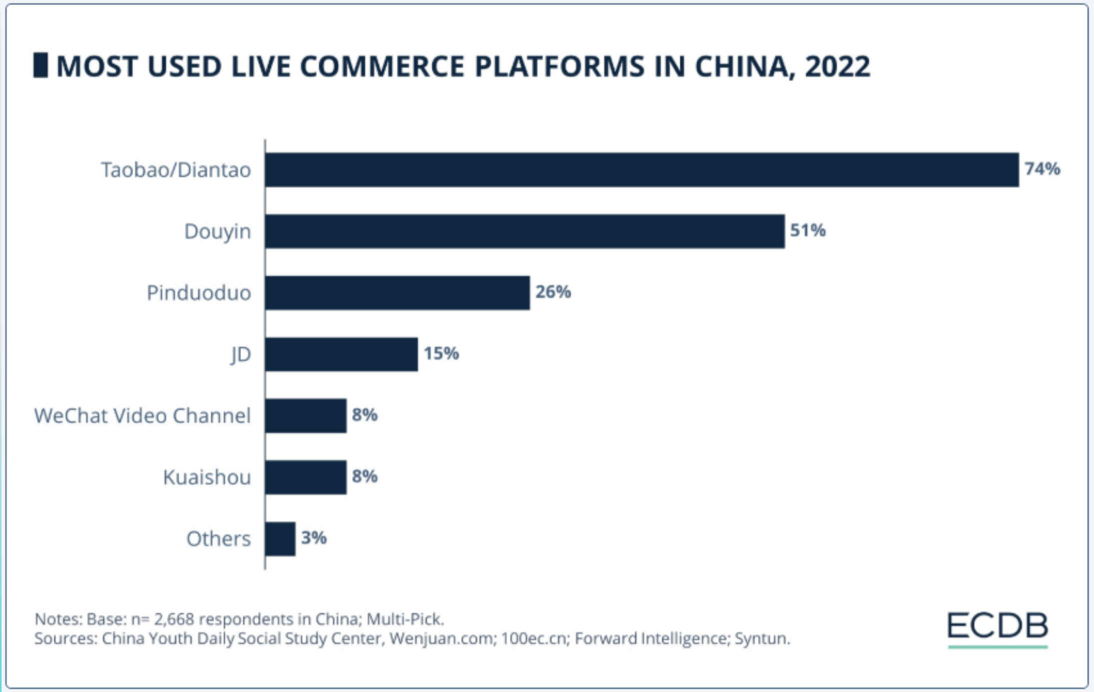
Drivers to buy



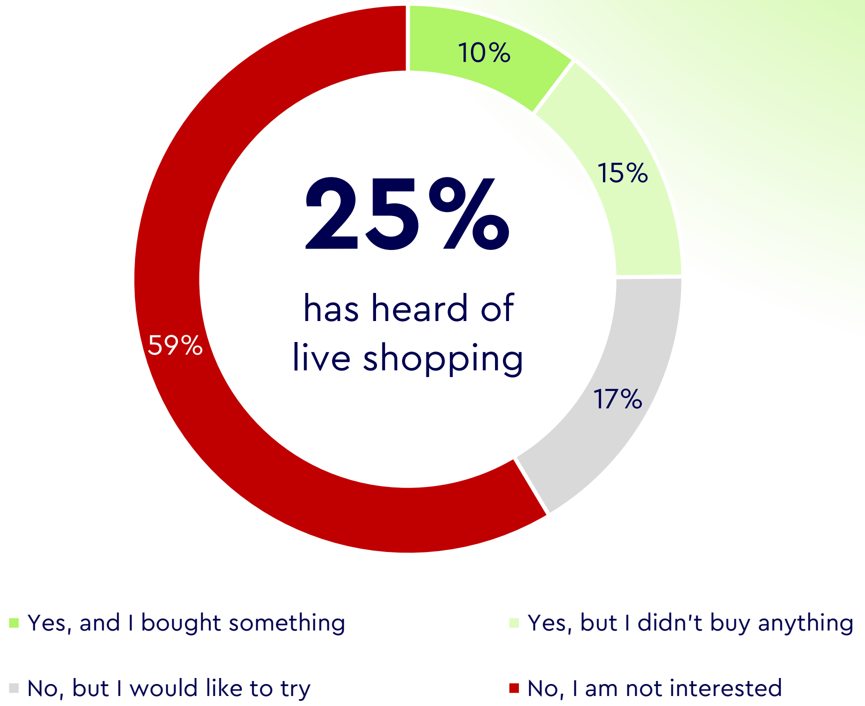
To what extent do you feel influenced by the following situations? I...
What motivates you to buy a product recommended by an influencer?

Live Shopping: China vs Belgium

Not there yet in Belgium & quite some resistance to the idea



Participation in live shopping event

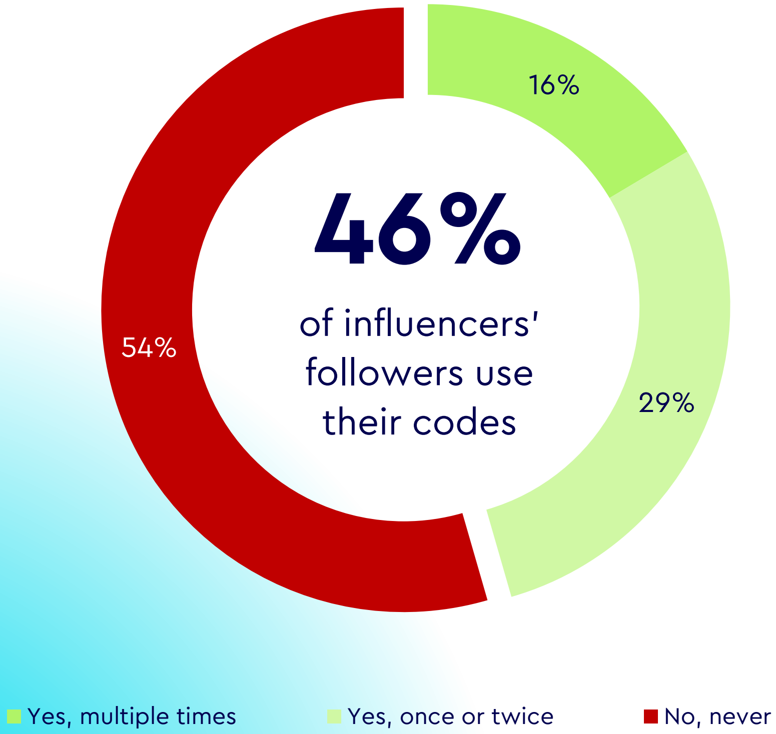


Have you already participated in a live shopping event organized by an influencer?

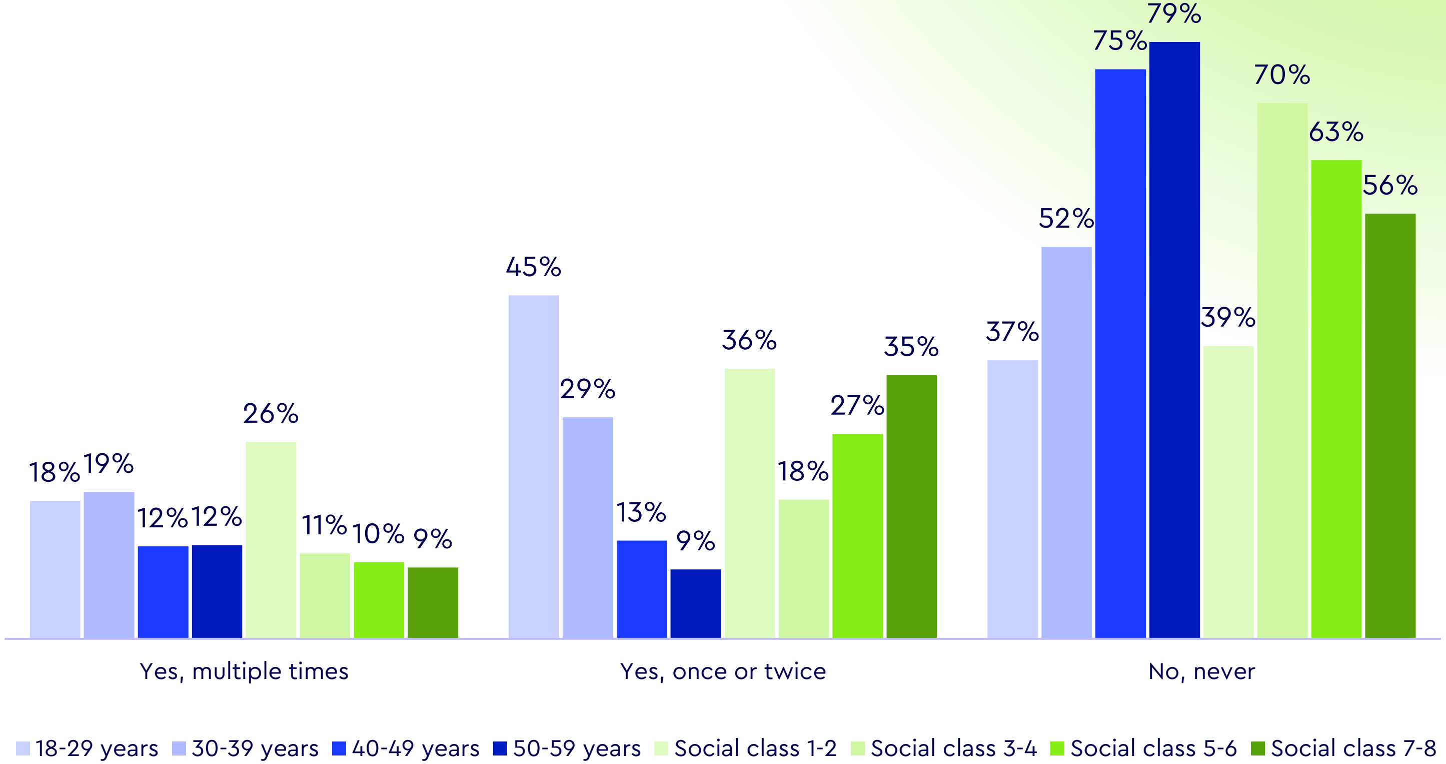
Using the promo codes

Younger & higher social class people looking for the right excuse to indulge?

Frequency of using promo codes by influencers



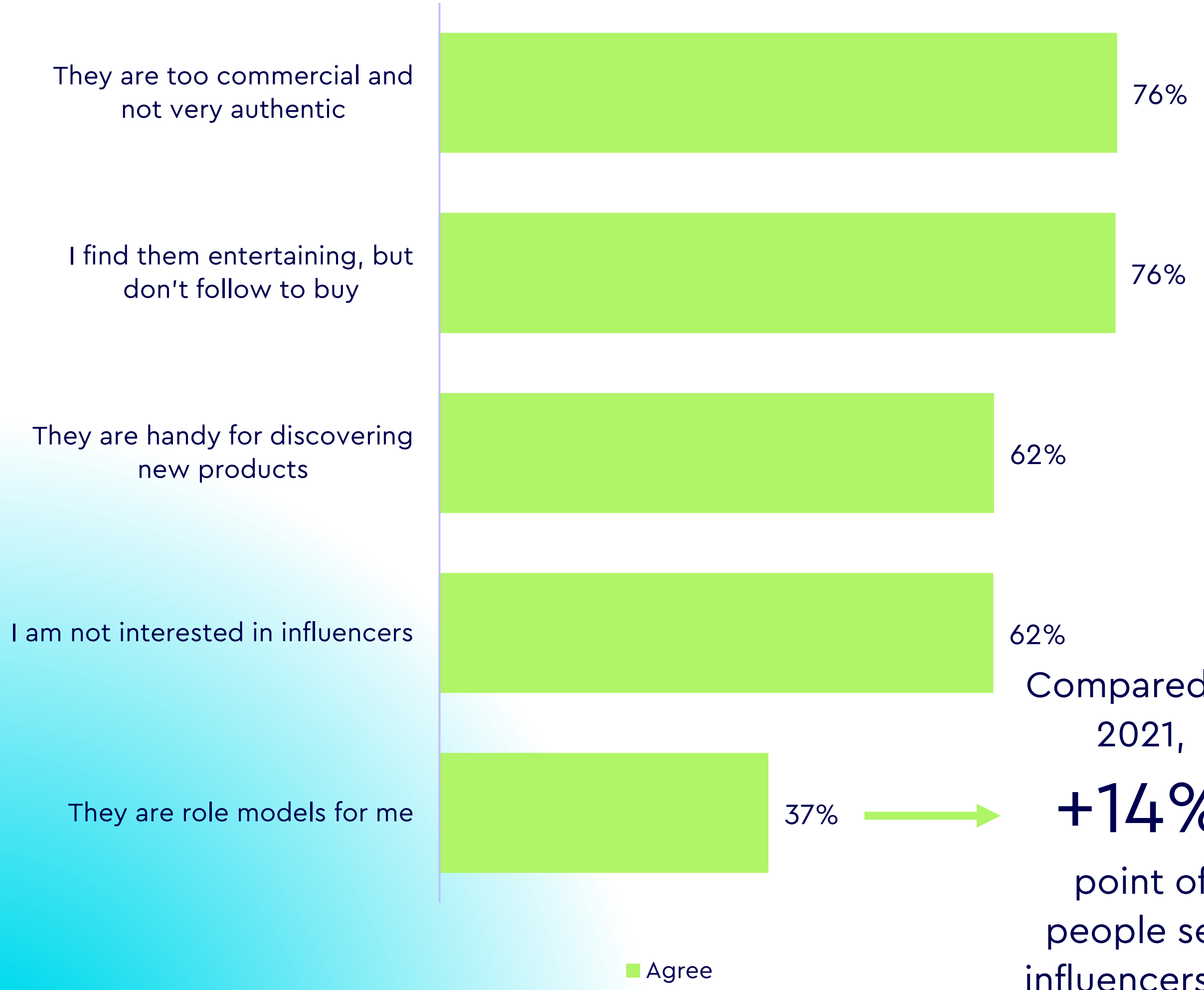
Profile of promo code users



Have you already participated in a live shopping event organized by an influencer?

How do we perceive the influencers

Though their objective is commercial, people find them entertaining



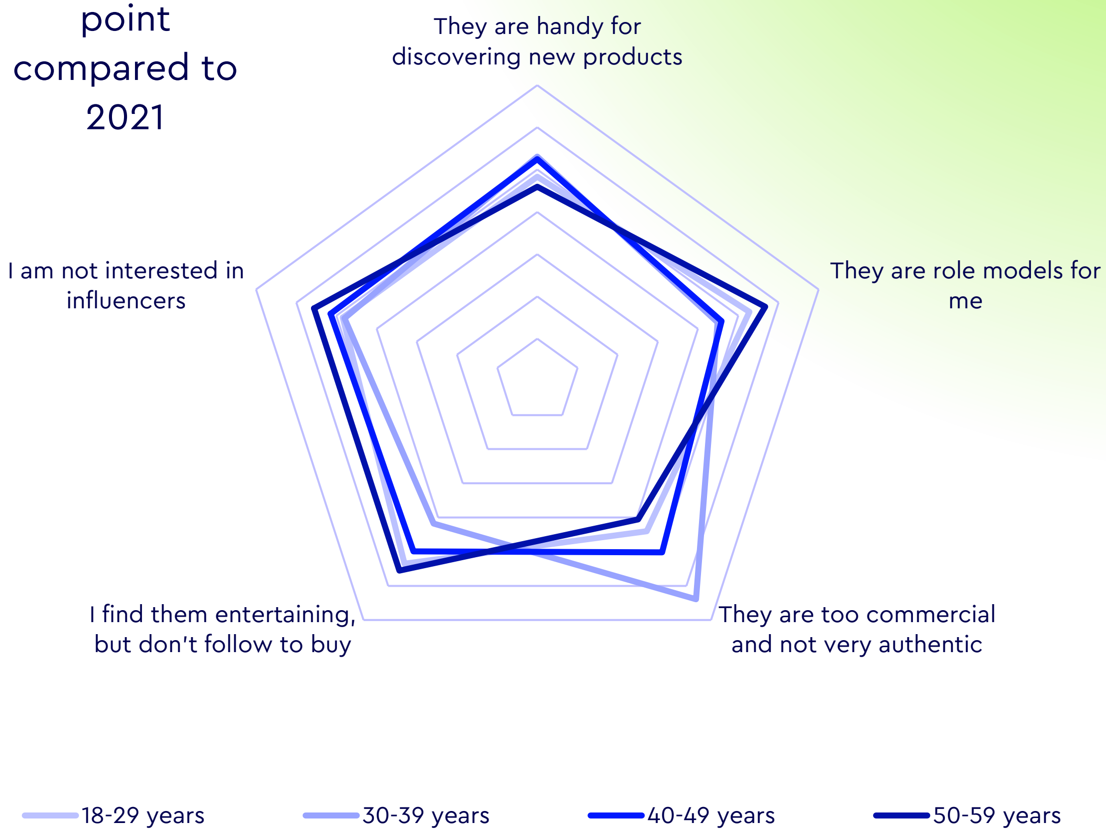
+1%

point compared to 2021

Compared to 2021,

+14%

point of people see influencers as role models



What is your opinion about influencers in general?

SECTION 06

Key take aways

06

Key take-aways

Uptake still rising, but plateau in sight

E-commerce penetration in Belgium **keeps edging up** (92% in 2021, **97%** in 2025), with most consumers intending to **maintain or slightly increase** their online activities. However, **offline habits persist**, especially for categories where 'seeing is believing', showing further growth may slow as the market saturates.

Category dictates channel

People shop online for some things, offline for others. Online spending tops offline, but fresh food, FMCG, and tactile purchases hold out in store. **Omnichannel shopping rises**, yet strong divides by category remain, showing that a **one-size-fits-all strategy will miss key nuances**.

Comfort and deals drive loyalty, but hurdles remain

Satisfaction with online shopping is up across the board (+24% vs 2021), mainly due to deals, selection, and convenience. Yet, concerns about **sensory experience**, rising delivery costs, and product quality **slow further migration online**. Motivation and friction vary by category, so there's **no universal recipe for growth**.

Key take-aways

Digital wins, but cash still counts

Digital payments, including mobile wallets, **are mainstream** (60% usage), but fully cashless stores face resistance. **Security remains a sticking point**, many users do not trust digital wallets fully, highlighting an **unresolved trust gap that could limit adoption.**

Second-hand gains, eco is still price sensitive

Re-commerce (second-hand buying) is up, **65% participate**, led by apparel, but traditional buying habits and quality concerns prevent wholesale online adoption. **Sustainability matters**, but **only 47% value durability**, and few want to pay extra for 'green' delivery. Environmental ideals buckle when faced with cost and convenience.

Hype outpaces comfort

Interest in AI and emerging tech (Augmented Reality/Virtual Reality) **is growing**, but most consumers are unenthusiastic or only 'somewhat comfortable' using them. AI search results are widely noticed and increasingly trusted, but **practical adoption of AR/VR remains niche**. The tech is out ahead of actual comfort or demand.

Key take-aways

Influence is real, but skepticism remains

Influencers drive purchase intent, especially where **promo codes** and deals soften the sales pitch. Still, only a minority regularly buy this way. **Entertainment value is high**, but audiences know the commercial agenda, the conversion relies on trust and immediate benefit, not blind follower loyalty.

E-commerce: turning point ahead

E-commerce in Belgium has matured, nearing universal adoption and settling into nuanced, category-driven patterns. The consumer now sees the platforms (online vs offline) as equal. They'll use one or the **other based on convenience**. Growth **now depends** less on raw digital adoption and more **on building trust**, addressing **cost barriers**, and offering seamless **tech-enhanced experiences** that genuinely **add value**. The **omni-channel experience** will be the experience that consumers are looking for, and it shall be **enhanced by AI**, but they'll continue to look for **the best prices**...