E-commerce Belgium 2018

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InSites Consulting

Introduction

For the first time in four years we are seeing an increase in e-commerce penetration. Online spending per person is also on the rise and m-commerce has finally reached critical mass in Belgium.

Showrooming and webrooming are occurring more frequently. An integrated omni-channel approach is a must!

Dominique Michel
CEO Comeos

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OBJECTIVES & METHODOLOGY

Objectives & Methodology

Background

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

Marketing objectives

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

Research questions

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

Method

Method: Online survey

Recruitment: Online research panel

Fieldwork period: 23rd March – 5th April 2018

Interview length: 20 minutes

Country: Belgium

Sample

n = 2014
Sample size was increased from 1500 to 2000 in order to increase the sample size per category. Each person saw up to 3 subcategories

Sample screening

Age: 15-70

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

Sample quota

Representative for Belgian population on gender, age, and region

Used symbols

★ Sign. Different from at least one other target group (95% confidence level)

▲▼ Meaningful difference compared with total

Error margin

n=100	10%	n=600	4%	n=1000	3%
n=400	5%	n=800	3%	n=1500	1%

Notes

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

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

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

- Broadening scope: in 2017 we detailed 72 subcategories (instead of 20), and included 'pralines' as our 15th main category. In 2018 we have included 4 new subcategories (see next slides)
- Keep core structure, add relevant questions (e.g. offline penetration vs online penetration, adding statements) and remove old ones (e.g. impact on offline experience, etc.)
- In 2017, the target group widened: as from 15yo instead of 18 yo.

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

KEY FINDINGS

Key findings

First increase of e-commerce penetration in 4y, 74% to 76%

Gradual change: *believers spend more and buy more frequently*
- Monthly purchases increase for the 8th year in a row, to 44%
- Spending behavior increases, with 6 out of 10 (+10%) spending at least € 100 the last month
- Self-declared spending behavior increases (37% to 39%)

Structural change: *non-believers find their way to webshops*
- Lack of trust in e-commerce is decreasing for the 8th year in a row
- Interest of laggards increases a lot (23% to 36%)

M-commerce reached the critical mass:
- Strong increase of m-commerce penetration, 22% to 35%
- Strong increase in future intention, 41% to 51%

Key findings

Growth noticeable among smaller categories:

- ‘animals’ and ‘home’ (penetration + frequency)
- ‘food’ (penetration)
- ‘transportation’, ‘pralines’ and ‘DIY & garden’ (frequency)

Context of purchase remains unchanged:

- Convenience remains biggest driver of buying online (vs offline), price biggest driver of choosing a particular webshop over other webshops
- People order in the evening, get their package delivered between 09:00 and 17:00, dominantly during the week and at home

Eye-catchers:

- The Bancontact app makes a difference (1 out of 10 purchases is done via the app)
- Webrooming <u>and</u> showrooming occur more frequently (strong, steady increase over the years), showing importance of cross channel in practice
- 1 out of 2 finds it normal to be helped by bots and virtual assistants.


CARD
4585 8546 3272 7656

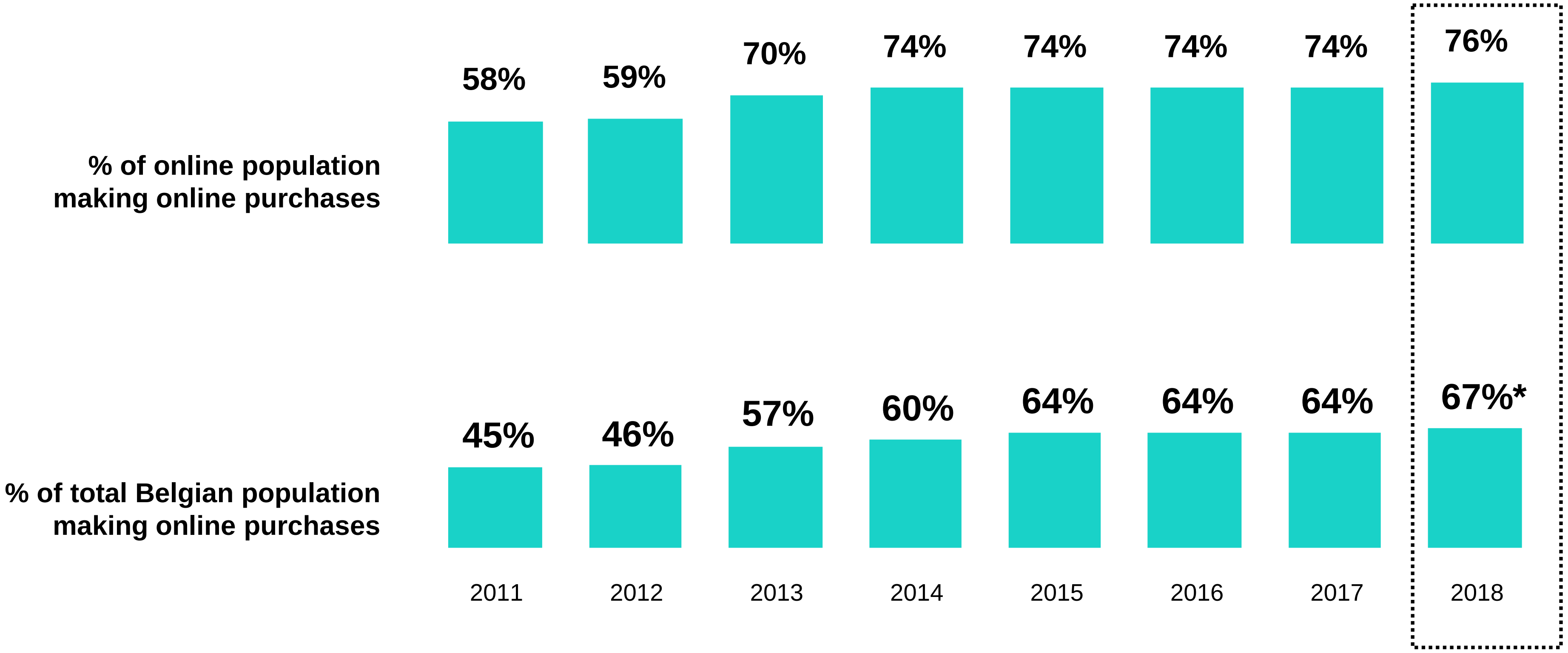
E-COMMERCE EXPERIENCE

E-commerce experience

Penetration last year

First increase in 4 years

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

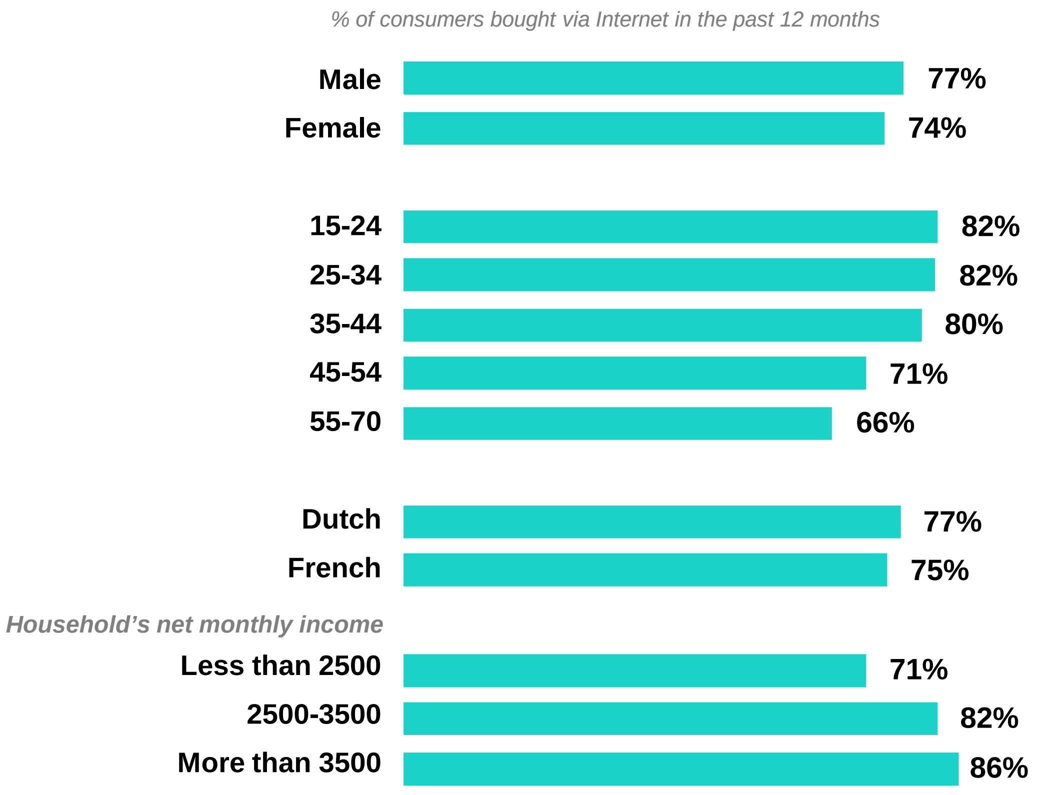


*Extrapolated to the Belgian population regarding the current internet-population (87,4% in 2015 based on estimate for July 1, 2016 - http://www.internetlivestats.com)

E-commerce experience

Penetration profile

Gender, age, income … makes no difference. Everybody buys online!

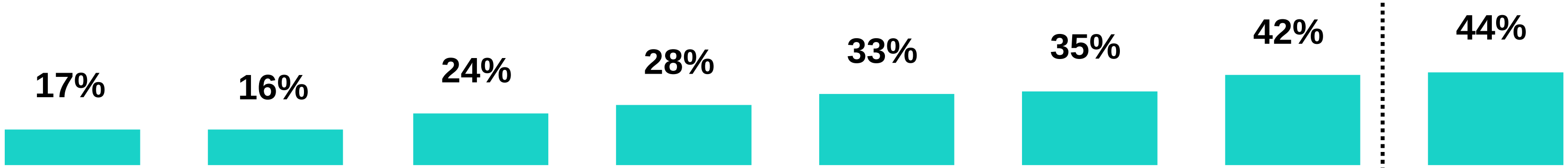


E-commerce experience

At least monthly purchases

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

Higher increase for weekly purchases

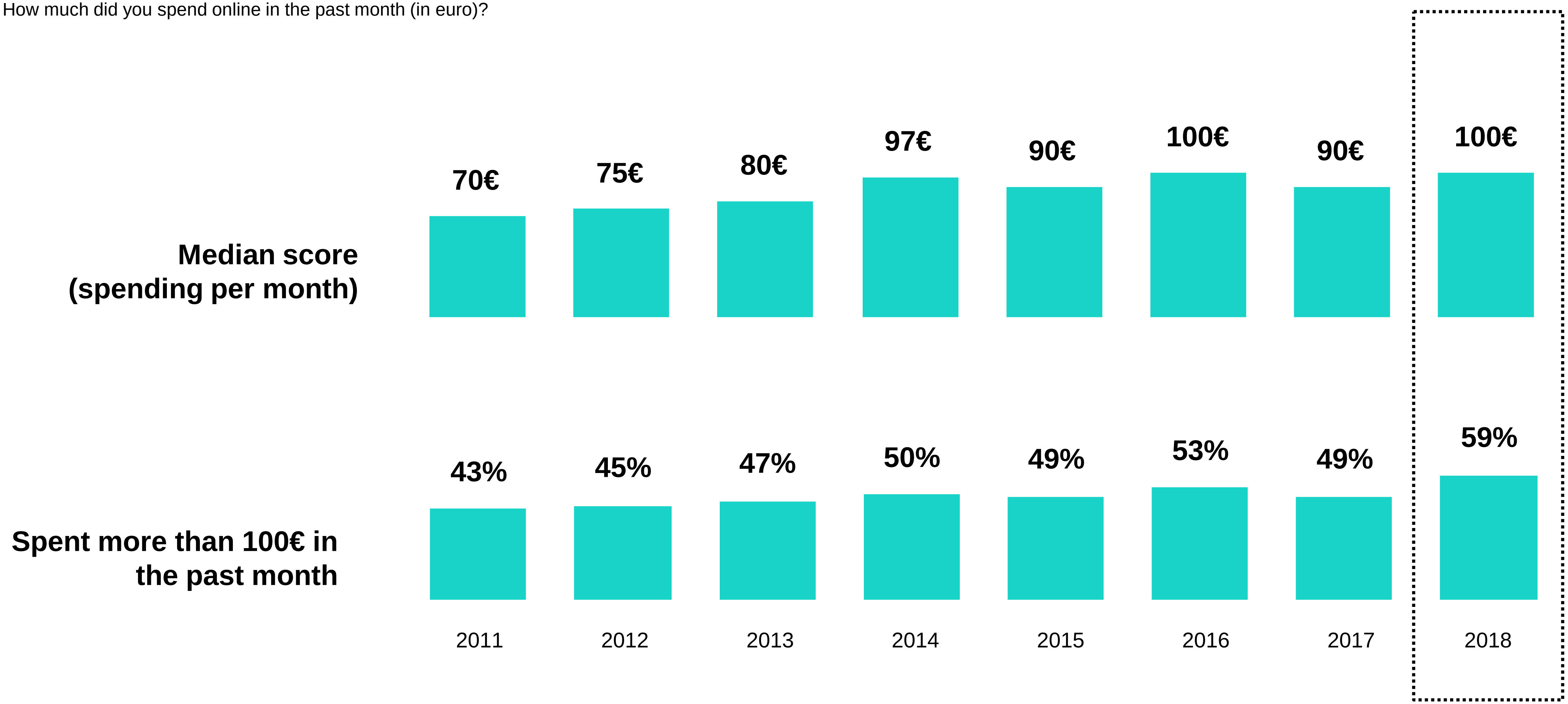


	2011	2012	2013	2014	2015	2016	2017	2018
Weekly	2%	2%	4%	5%	6%	8%	7%	**9%**
Monthly	15%	14%	20%	23%	27%	27%	35%	**35%**
Every 1 to 3 months	31%	30%	30%	33%	31%	32%	29%	31%
Every 3 to 6 months	22%	24%	23%	20%	18%	16%	16%	15%
Every 6 to 12 months	20%	23%	18%	15%	14%	12%	10%	8%
Less than once a year	10%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

E-commerce experience

Current online shopping behavior

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



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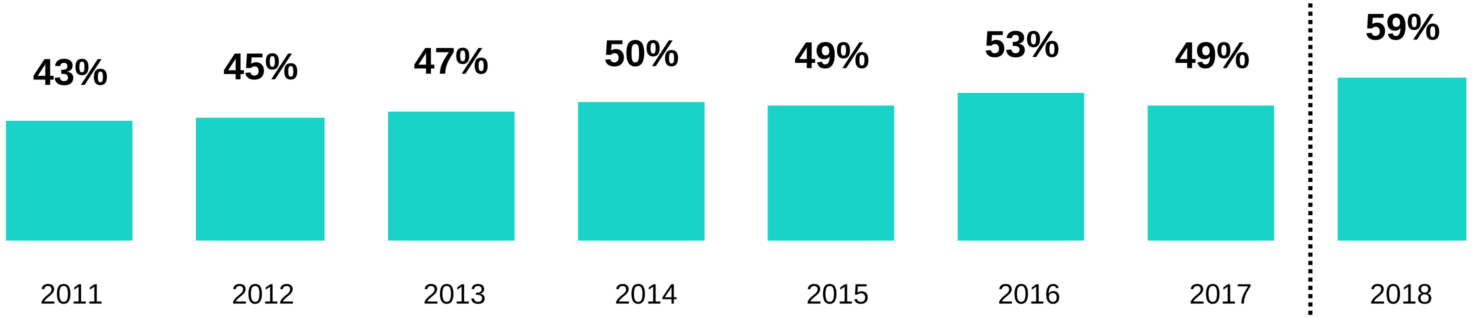
E-commerce experience

Current online shopping behavior

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

> 150€ is a normal monthly budget for almost 1 out of 2

More than 100€



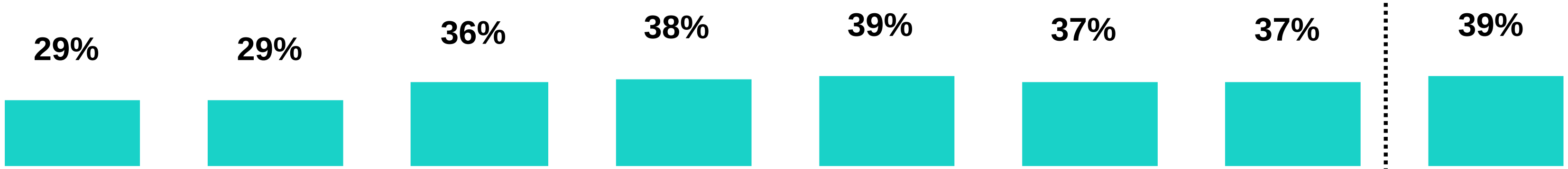
	2011	2012	2013	2014	2015	2016	2017	2018
More than €150	30%	32%	35%	33%	31%	39%	34%	**42%**
Between €100 & €149	13%	13%	12%	17%	18%	15%	15%	**17%**
Between €50 & €99	22%	19%	20%	21%	23%	19%	20%	**18%**
Between €20 & €49	16%	10%	17%	16%	14%	16%	13%	**12%**
Less than €20	19%	26%	16%	13%	14%	12%	18%	**10%**

E-commerce experience

Evolution budget – spend more

Self-declared spending behavior increases

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



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

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E-commerce experience

Drivers for E-commerce

Time & convenience remain the main drivers

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

	2018	Difference 2018 - 2017	Difference 2018 - 2011
Because it saves time	44%	-3%	-1%
Because it gets delivered to my door	37%	0%	+3%
Because I can find products and services at lower prices	36%	+1%	-1%
Because I'm able to shop 24 hours a day	34%	-4%	-3%
Because I get access to special discounts, promotions...	29%	+4%	0%
Because I have a wider selection of products/services online	27%	-2%	+4%
Because I can compare and review different products/services	24%	0%	+3%
Because I avoid crowds	18%	0%	+2%
Because there is more product information online	14%	-2%	-1%
Because I can see whether items are in stock	13%	-1%	-2%
Because I get access to products/services that aren't available in my country	13%	0%	-1%
Because I can always send back the product within a fortnight	8%	N.A.	N.A.
Other reason	5%	-2%	+1%

Time & Convenience

Money

Purchase Management

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E-commerce experience

Ways of payments

Q: How did you pay for it?

The Bancontact app makes a difference : 1 out of 10 purchases with the app

	2018	Difference 2018 - 2017	Difference 2018 - 2011
Online – Credit card (Visa, MasterCard, American Express...)	24%	-8%	-19%
Online – Bank card (Bancontact/Mister Cash)	22%	-6%	+7%
Online – PayPal	10%	-2%	+3%
Mobile app - Bancontact app	8%	N.A.	N.A.
Mobile app - My bank's app	6%	+2%	N.A.
Offline – Bank transfer	5%	+1%	-14%
Mobile app - PayPal	5%	+1%	N.A.
Offline – By card (credit card, bank card) at the point of sale	4%	+1%	-1%
Mobile app - Credit card	4%	+1%	N.A.
Offline – Cash at the point of sale	3%	+1%	+1%
Offline – Cash at the door	2%	0%	-1%
Offline – By card (credit card, bank card) at the door	2%	+1%	+1%
Online – Other	1%	0%	-3%
Offline – SMS payment	1%	+1%	+1%

I don't know – 4%

E-commerce experience

Delivery method

Nothing beats home delivery

Q: How was <PRODUCT> delivered?

	2018	Difference 2018 - 2017	Difference 2018 - 2011
Home delivery	64%	-1%	-2%
Pick-up at a pick-up point	9%	-1%	-6%
Pick-up at the shop	8%	0%	0%
Delivery at work	2%	-1%	-4%
Pick-up in a locker (sealed container to be opened with a code)	1%	0%	+1%
Other	10%	+4%	+8%

I do not remember – 5%

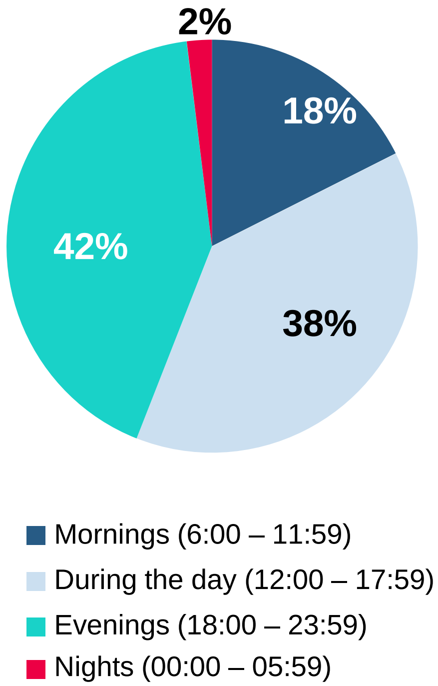
E-commerce experience

Time of purchase / Delivery Time

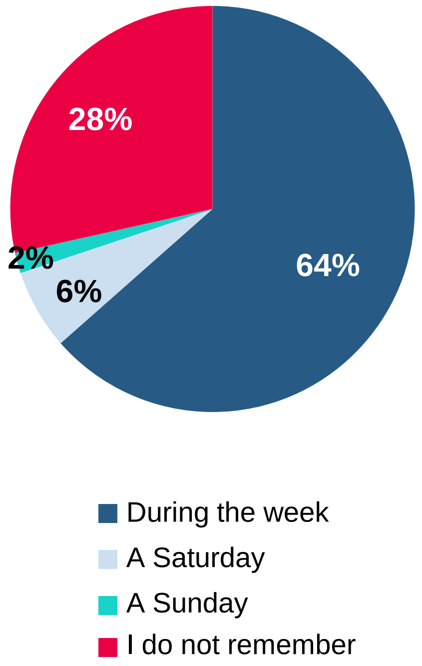
Almost half of online purchases done after working hours

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

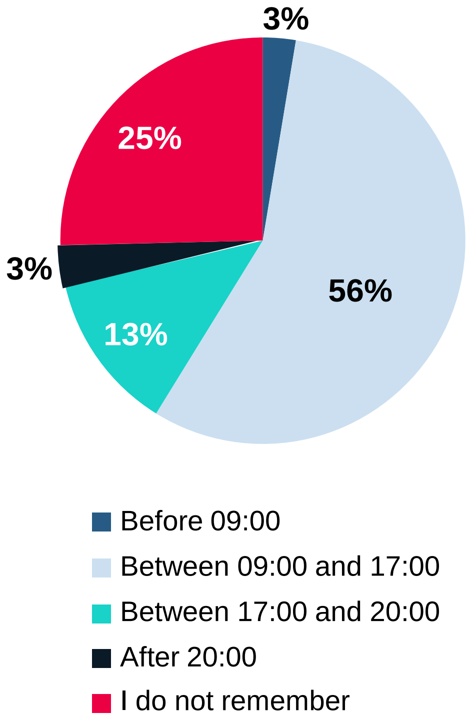
Time of purchase



Day of delivery



Hour of delivery



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But Honey, you don't understand! I was really buying wood! For the fireplace! ... For the fireplace!!

E-commerce experience

Website Drivers

Websites must focus on price and experience

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

% indicated as the main factor of using <website>		Difference 2018 - 2017	Difference 2018 - 2011
Price	20%	-2%	-11%
Satisfaction with previous experiences	9%	0%	-3%
Quick delivery	6%	-1%	-4%
Out of habit	6%	N.A.	N.A.
Product selection and availability	5%	-1%	-8%
Trust and safety	5%	0%	-3%
User-friendliness of the website	4%	0%	-2%
Low shipment costs	3%	0%	0%
Accidental - just where I found it	3%	0%	-3%
Recommended by a friend	2%	0%	-1%
Return or guaranty policy	1%	-1%	-2%
Because I can always send back the product within a fortnigh	1%	N.A.	N.A.
Completeness of the product information	1%	0%	-1%
Other	2%	0%	-2%


Look, ordered!
300 euros cheaper on
www.nigerianprince.com!
KLIER'18

E-commerce experience

Barriers

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

Security & sharing personal data no longer an issue

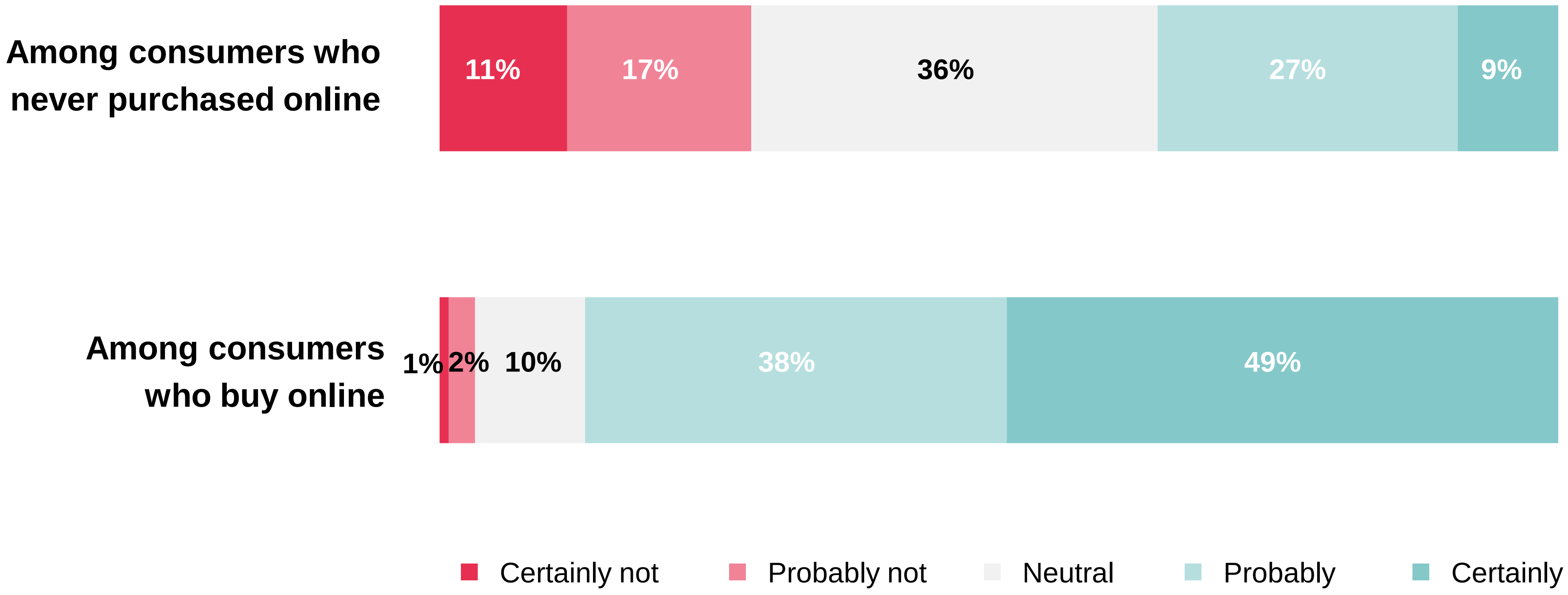
	2018	2017	2016	2015	2014	2013	2012	2011
I want to see it/try it before deciding to buy and that is not possible with e-commerce	30%	37%	36%	38%	31%	37%	41%	37%
I have access to all the products/services I need in physical shops	23%	22%	26%	26%	19%	17%	23%	23%
I want to see whether items are in stock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

E-commerce experience

Future interest

Q: Would you consider buying new products/services on the Internet in the future? |
How likely are you to purchase other new products or services on the Internet in the future?

Interest of laggards increases a lot : from 23% to 36%



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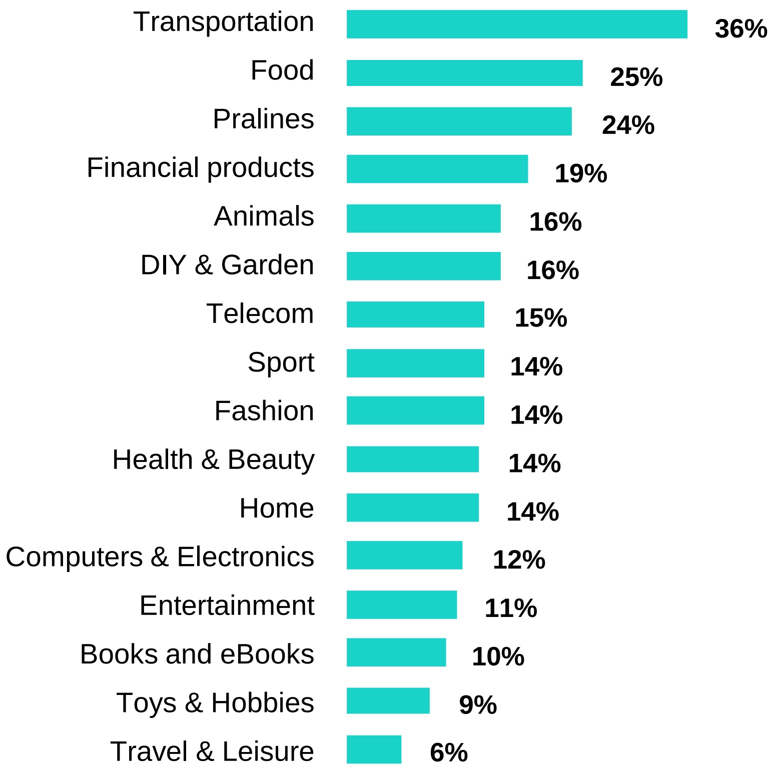
E-commerce experience

Rejection to buy online (non-buyers included)

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



E-commerce experience

Reasons of rejection to buy online (non-buyers included)

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

E-commerce experience

Reasons of rejection to buy online - Details

Sellers of financial products can’t convince online buyers

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

	Total	**Books & eBooks**	**Entertainment**	**Computer & Electronics**	**Telecom**	**Fashion**	**Toys & hobby**	**Home**	**DIY & Garden**	**Food**	**Pralines**	**Health & beauty**	**Sport**	**Animals**	**Traveling & leisure time**	**Transportation**	**Financial products**
Because I want to see or try it first	**40%**	22%	14%	54%	14%	72%	37%	53%	49%	31%	40%	36%	57%	41%	14%	55%	11%
Because I wish to be able to talk to the shop assistant or seller	**26%**	7%	13%	41%	52%	20%	23%	21%	35%	10%	8%	33%	17%	16%	27%	32%	63%
Because physical shops clearly offer advantages, e.g. wider range, immediately available...	**21%**	13%	11%	22%	16%	23%	29%	30%	24%	33%	30%	24%	15%	30%	15%	16%	11%
I would never buy this product, not even offline in a physical shop	**16%**	33%	48%	7%	12%	8%	20%	11%	9%	17%	6%	11%	15%	10%	18%	6%	4%
Out of habit	**15%**	19%	18%	11%	23%	8%	18%	12%	8%	24%	25%	17%	10%	24%	25%	7%	11%
Because the value of the product is too important	**14%**	10%	8%	25%	15%	12%	9%	12%	12%	5%	3%	6%	7%	7%	14%	44%	23%
Because online purchasing does not offer any clear advantage, e.g. cheaper, quicker...	**12%**	14%	9%	9%	17%	8%	12%	14%	13%	18%	18%	16%	7%	12%	16%	8%	14%
Other	**4%**	9%	6%	4%	2%	3%	4%	1%	2%	7%	4%	8%	6%	4%	8%	1%	3%

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DEVICES

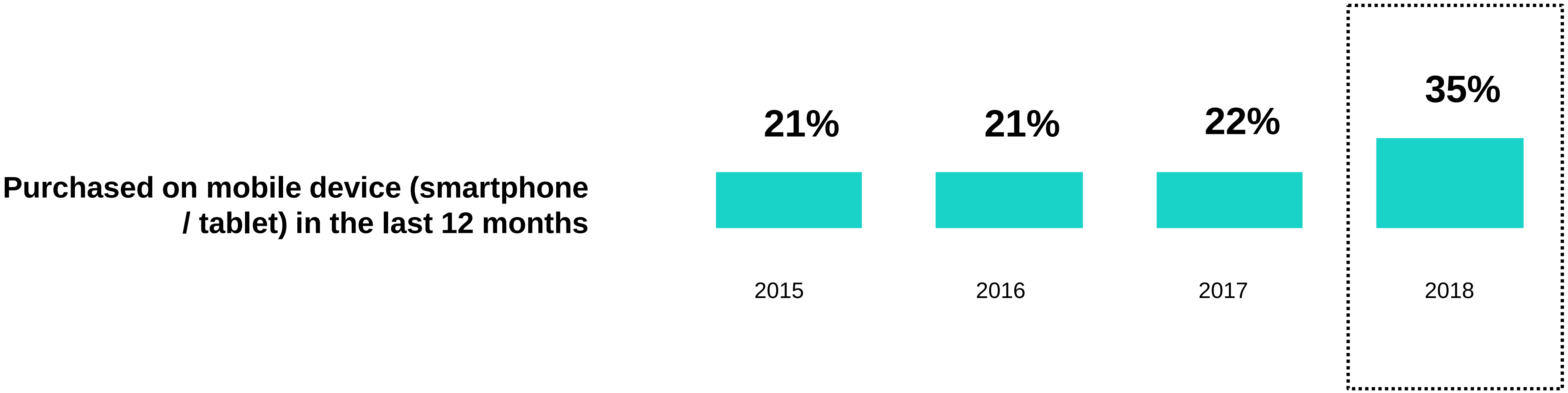

PAY

Devices

Mobile devices

M-commerce reached the critical mass

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

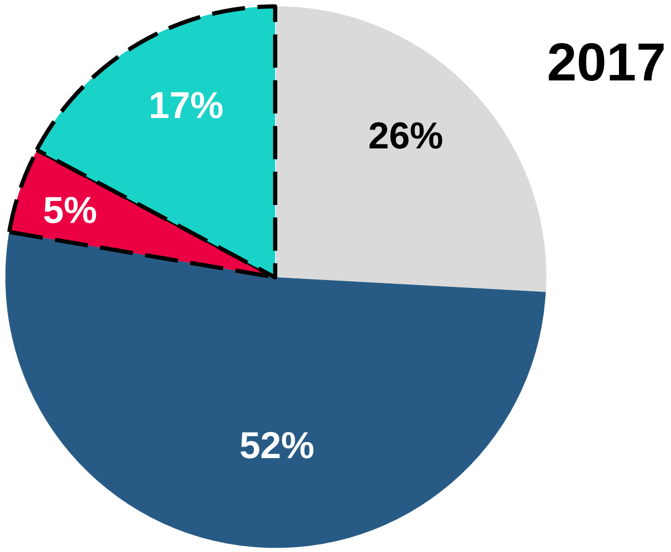


Devices

Mobile devices

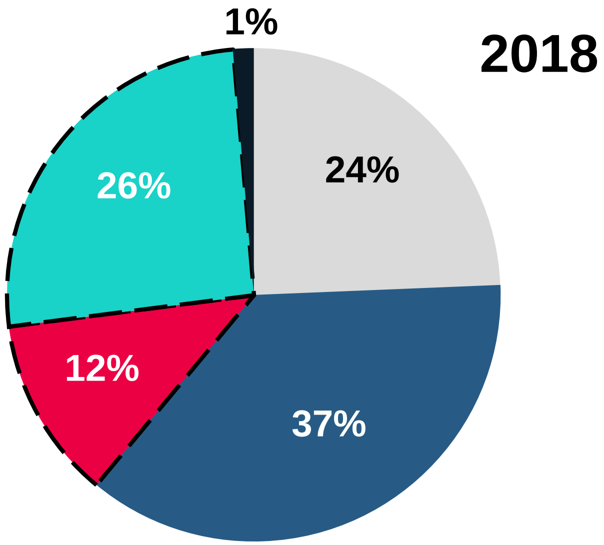
Q: Did you buy new - non-secondhand - products or services via the Internet in the past 12 months?

Purchasing only via smartphone/tablet doubled



- Purchased **only** via computer/laptop
- Purchased **only** via smartphone/tablet
- Purchased via computer/laptop **and** smartphone/tablet
- Haven't purchased in the last 12 months

vs.

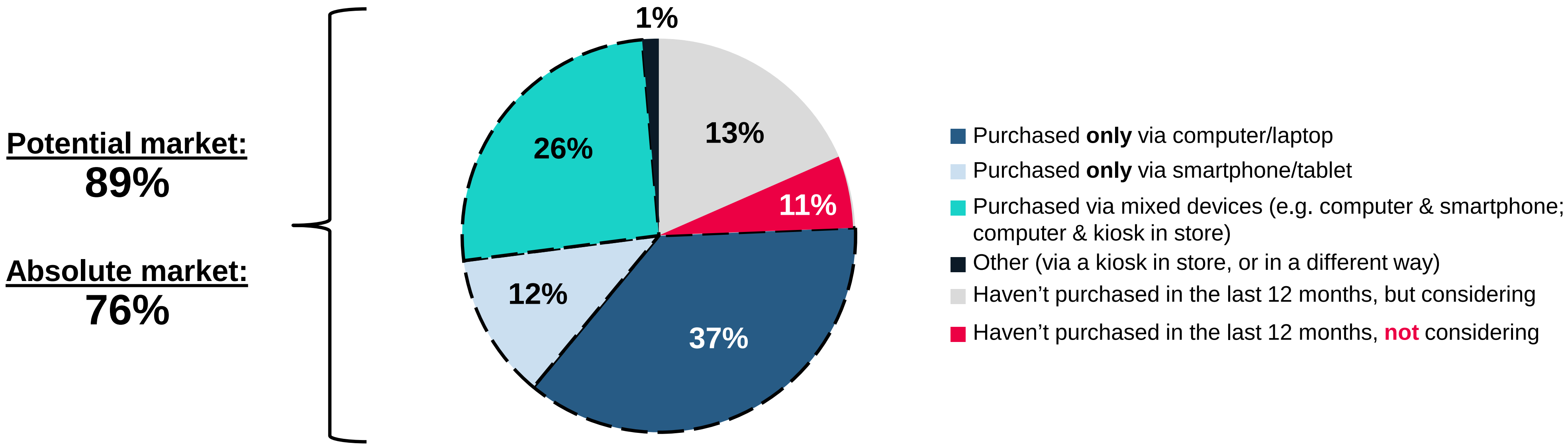


- Purchased **only** via computer/laptop
- Purchased **only** via smartphone/tablet
- Purchased via mixed devices (e.g. computer & smartphone; computer & kiosk in store)
- Other (kiosk in store, QR code in store)
- Haven't purchased in the last 12 months

Devices

Mobile devices

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

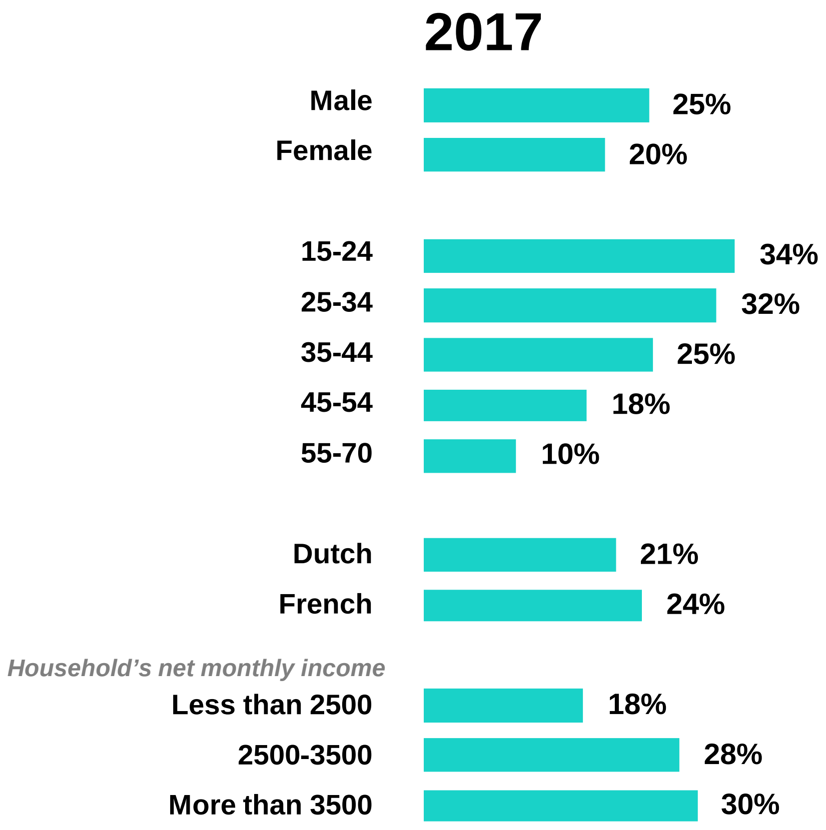


Devices

Mobile devices

Number of women buying on mobile devices almost doubled

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



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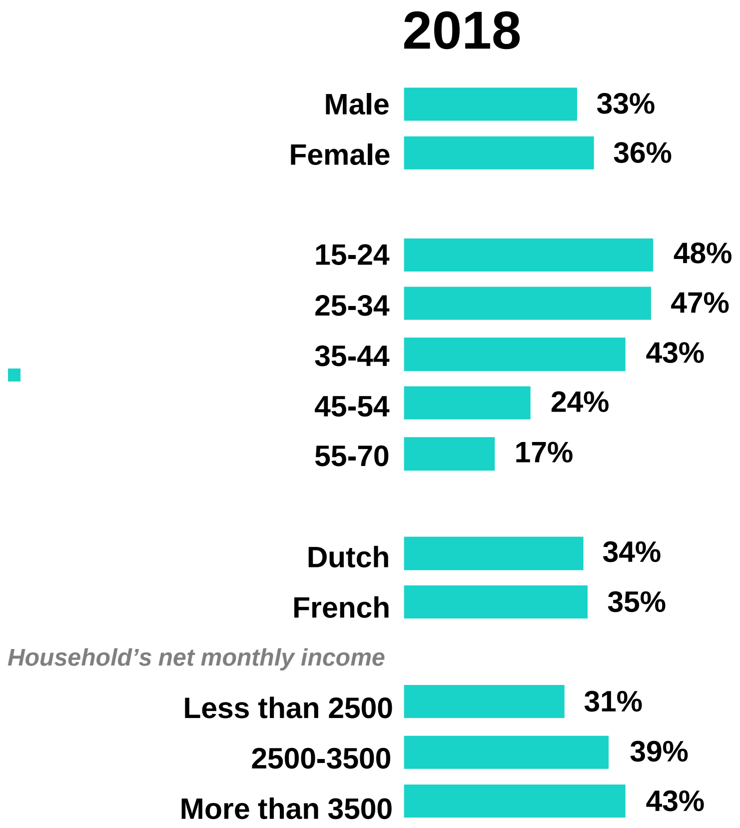
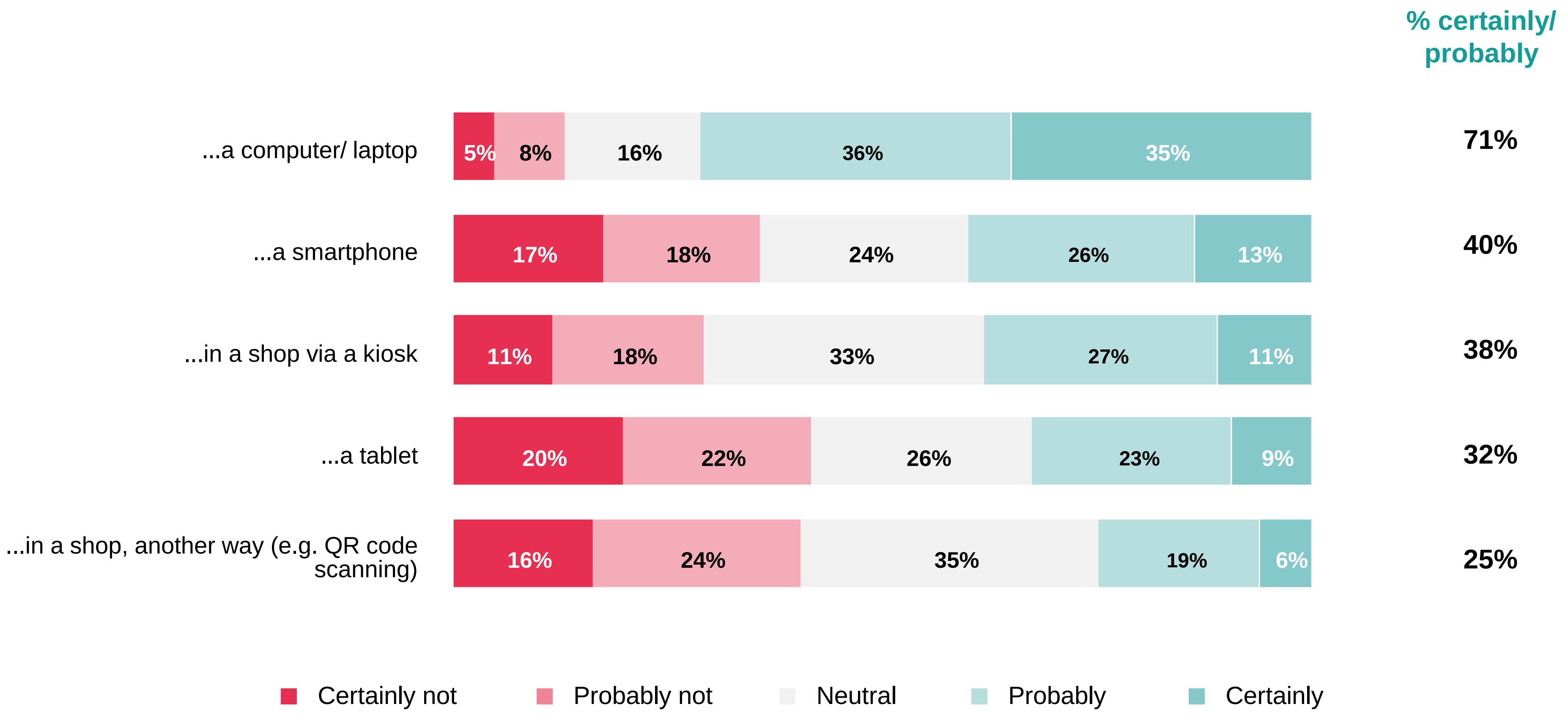


Devices

Future intention to buy

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



Devices

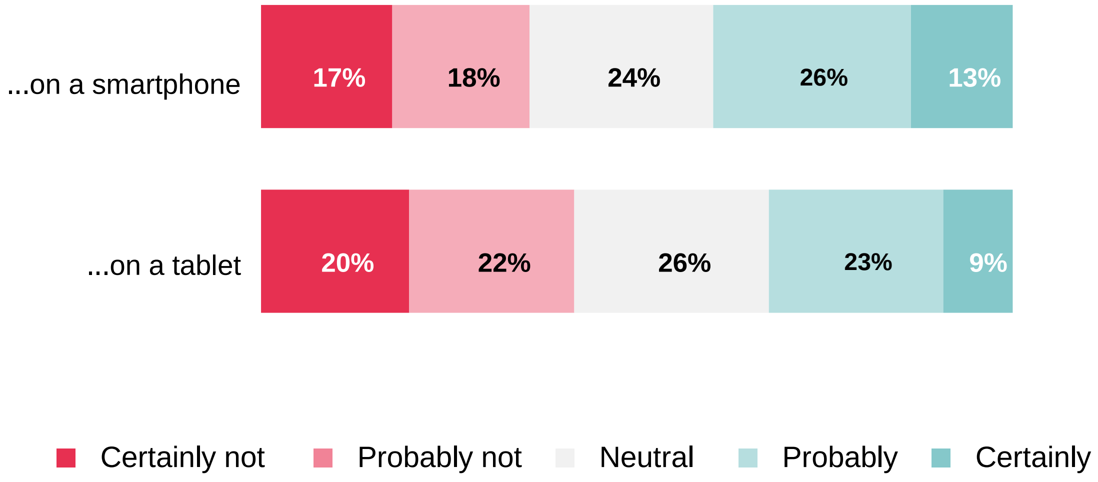
Future intention to buy on mobile device

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

1 out of 2 intends to buy on mobile devices

% certainly/ probably buy on a smartphone or tablet

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



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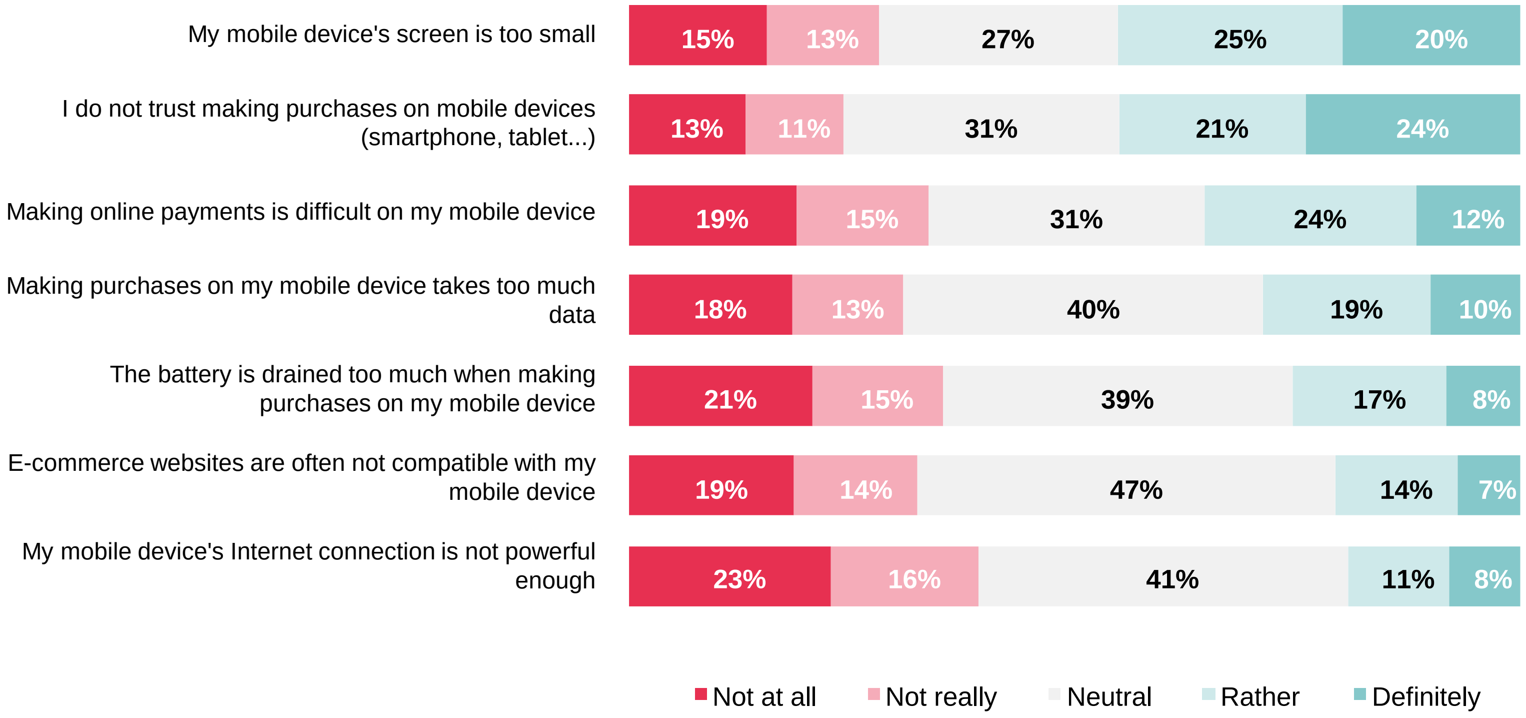
Devices

Barriers for making mobile purchases

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

Barriers are less dissuading



% Definitely / rather

	2018	2017
My mobile device's screen is too small	45%	52%
I do not trust making purchases on mobile devices (smartphone, tablet...)	45%	37%
Making online payments is difficult on my mobile device	35%	37%
Making purchases on my mobile device takes too much data	29%	31%
The battery is drained too much when making purchases on my mobile device	26%	26%
E-commerce websites are often not compatible with my mobile device	21%	31%
My mobile device's Internet connection is not powerful enough	19%	25%

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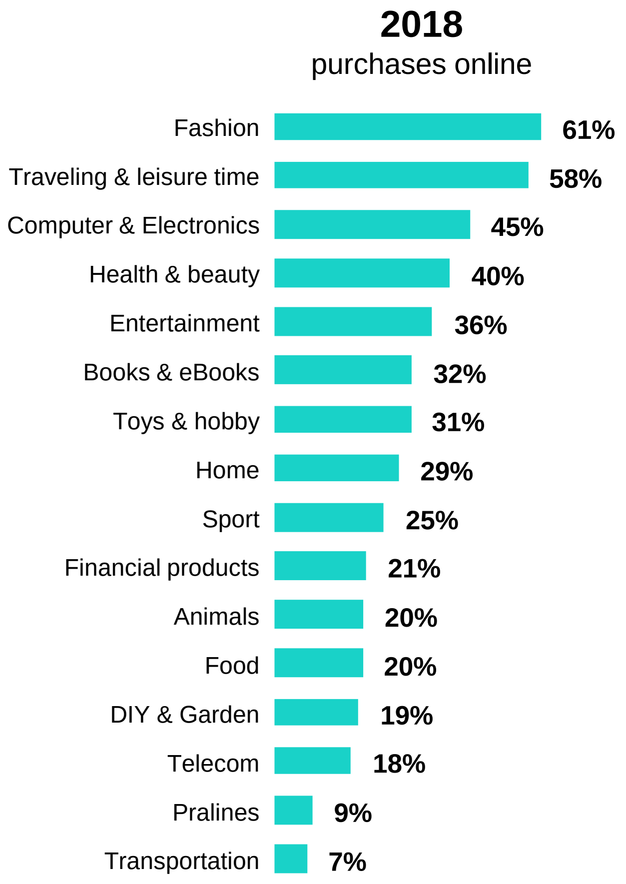
ONLINE PURCHASES

Online purchases

Current purchase new products

Slight decline for Traveling & Leisure in 7 years

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



Difference
2018 - 2011

+23%
-1%
+5%
+21%
-12%
+1%
+19%
+22%
+19%
N.A.
N.A.
+12%
+13%
+2%
N.A.
+5%

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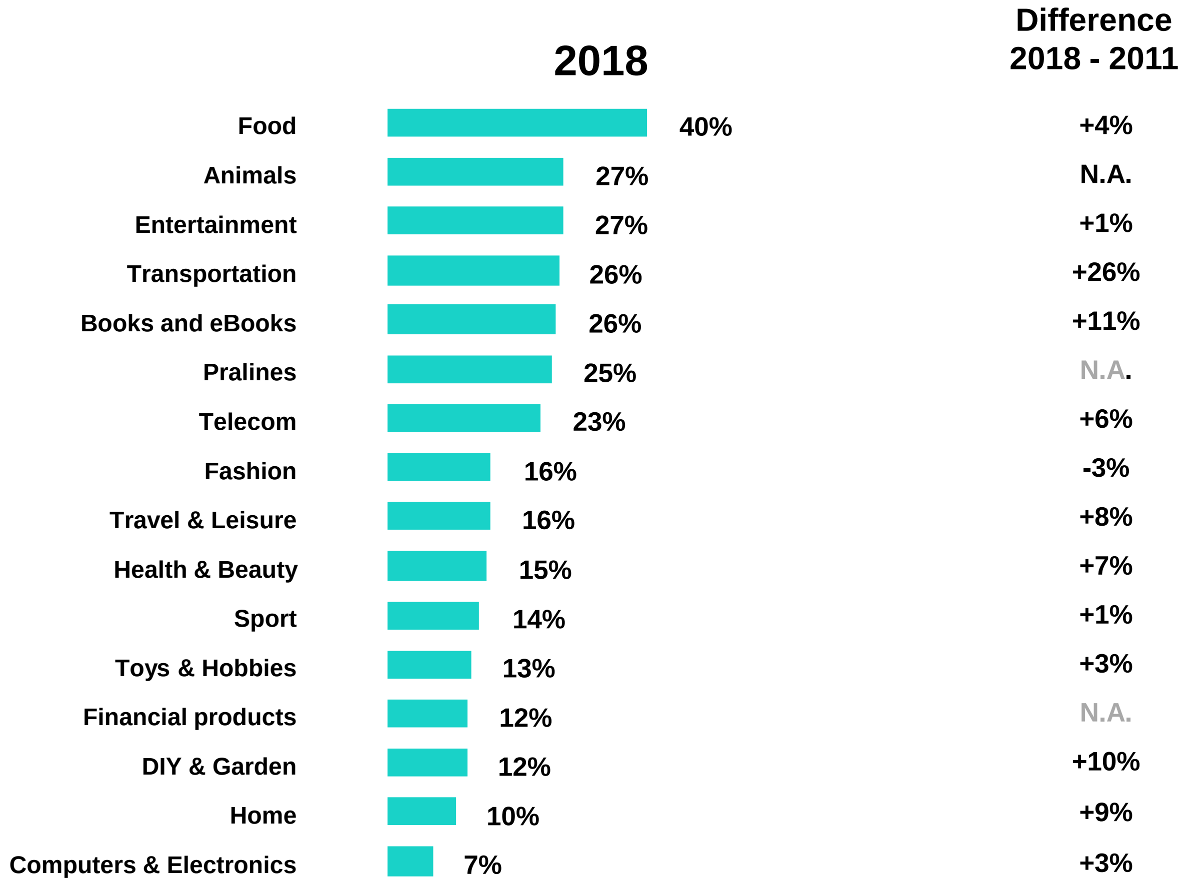
Online purchases

Buying frequency more than 5 times

Animals second most frequently bought category

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



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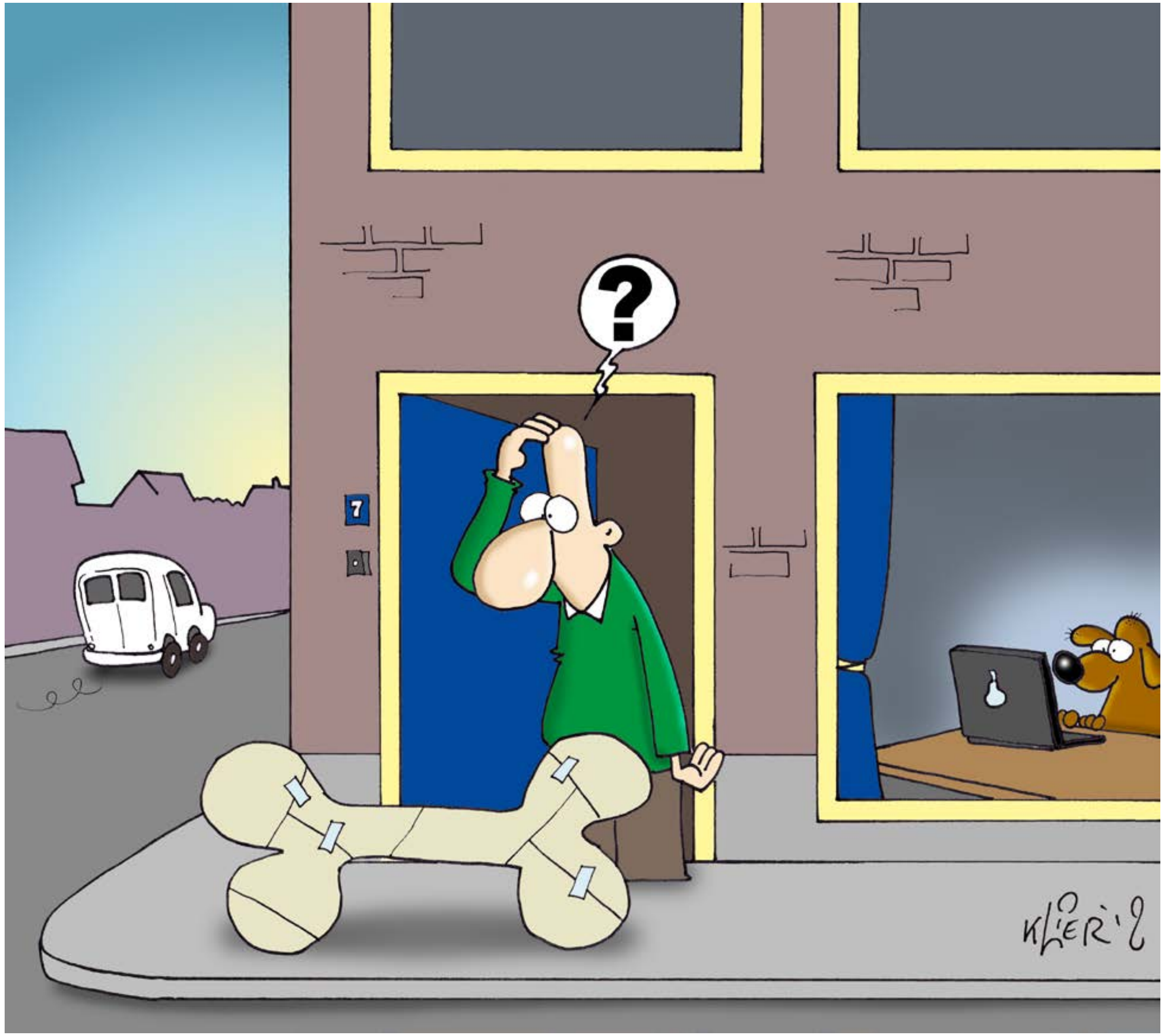
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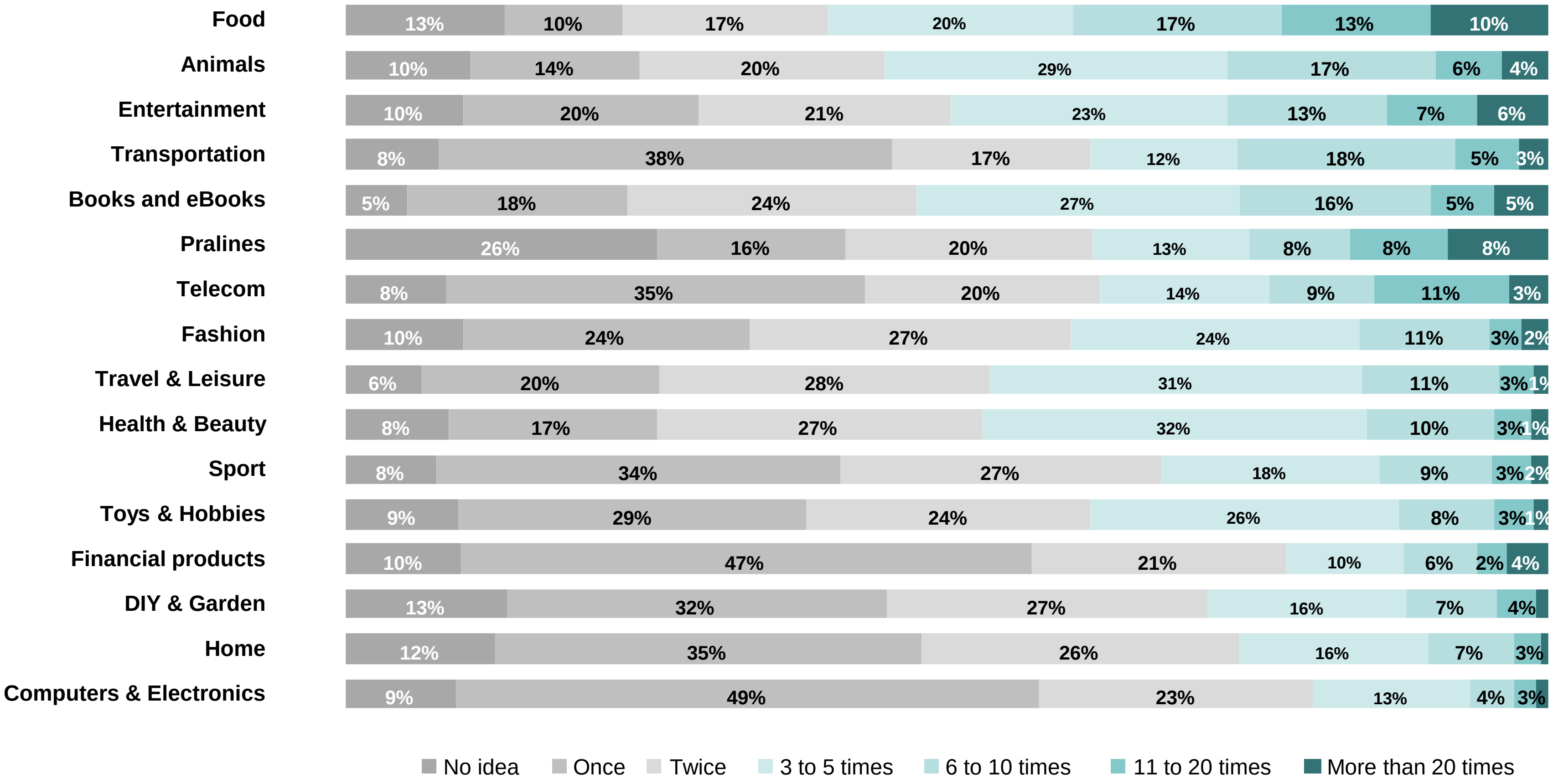
Online purchases

Frequency current online purchases

1 out of 10 buys Food twice a month

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



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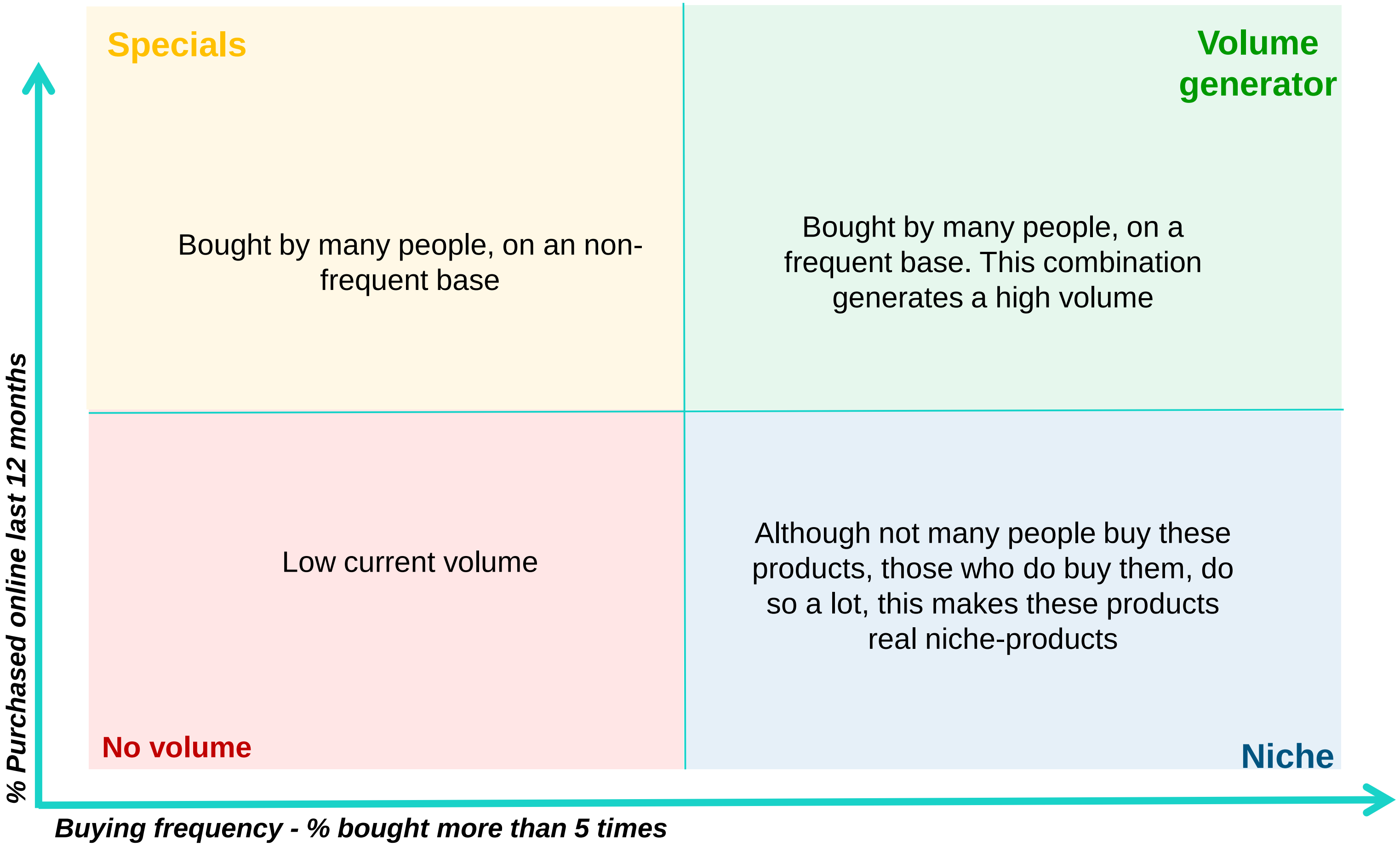
Online purchases

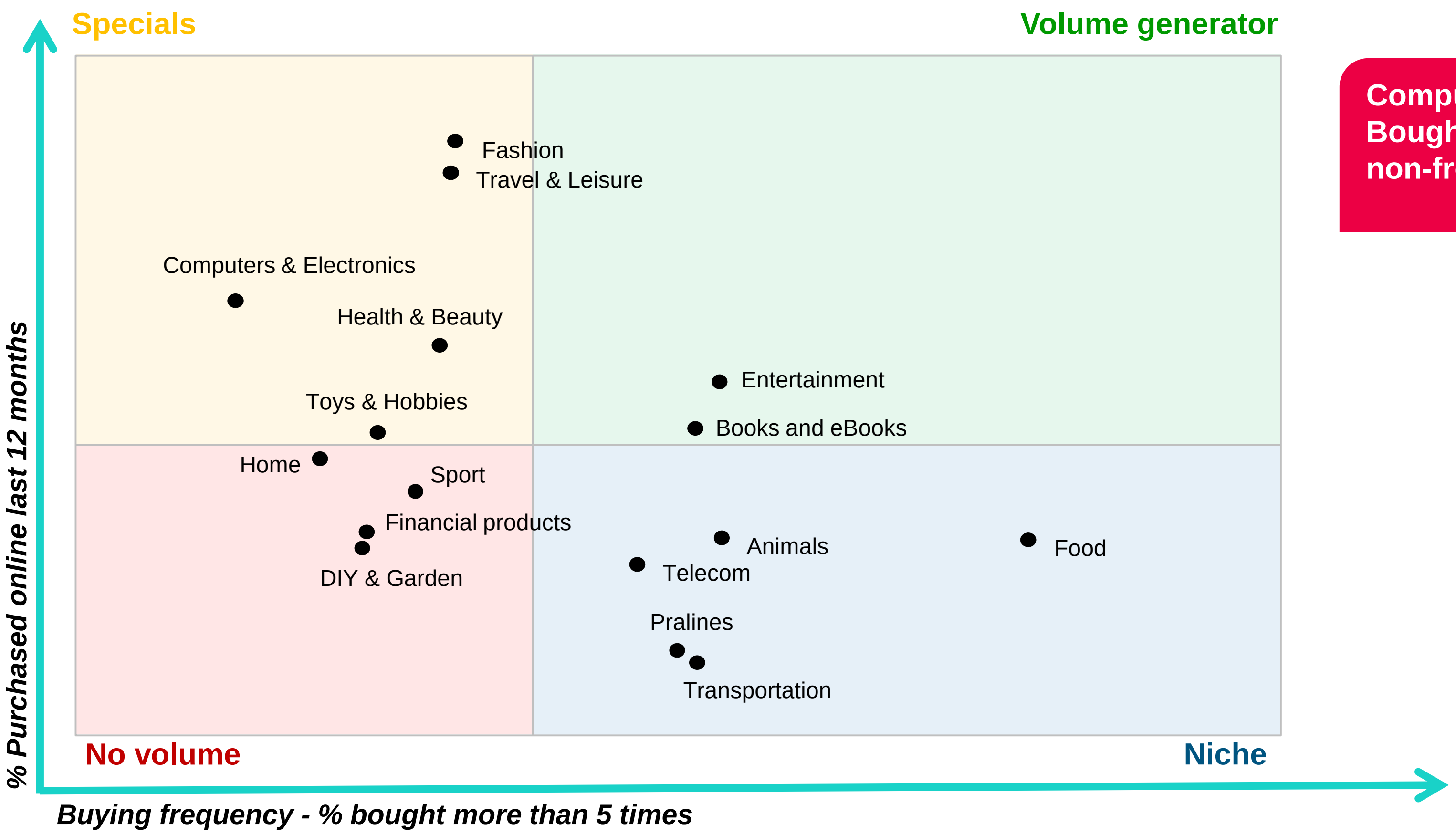
Quadrant explanation



Online purchases

Quadrant 2018

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



Computers & Electronics :
Bought online by many people, on an non-frequent base

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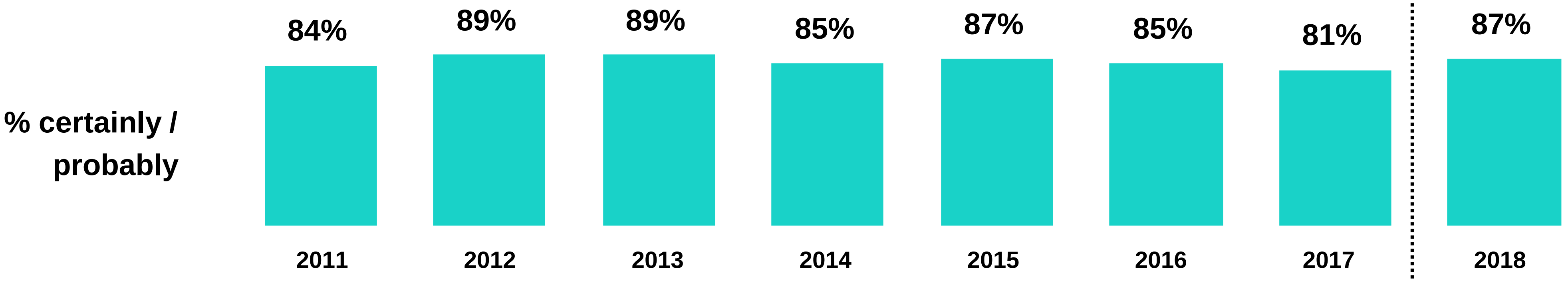
Online purchases

Future intention to buy

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



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

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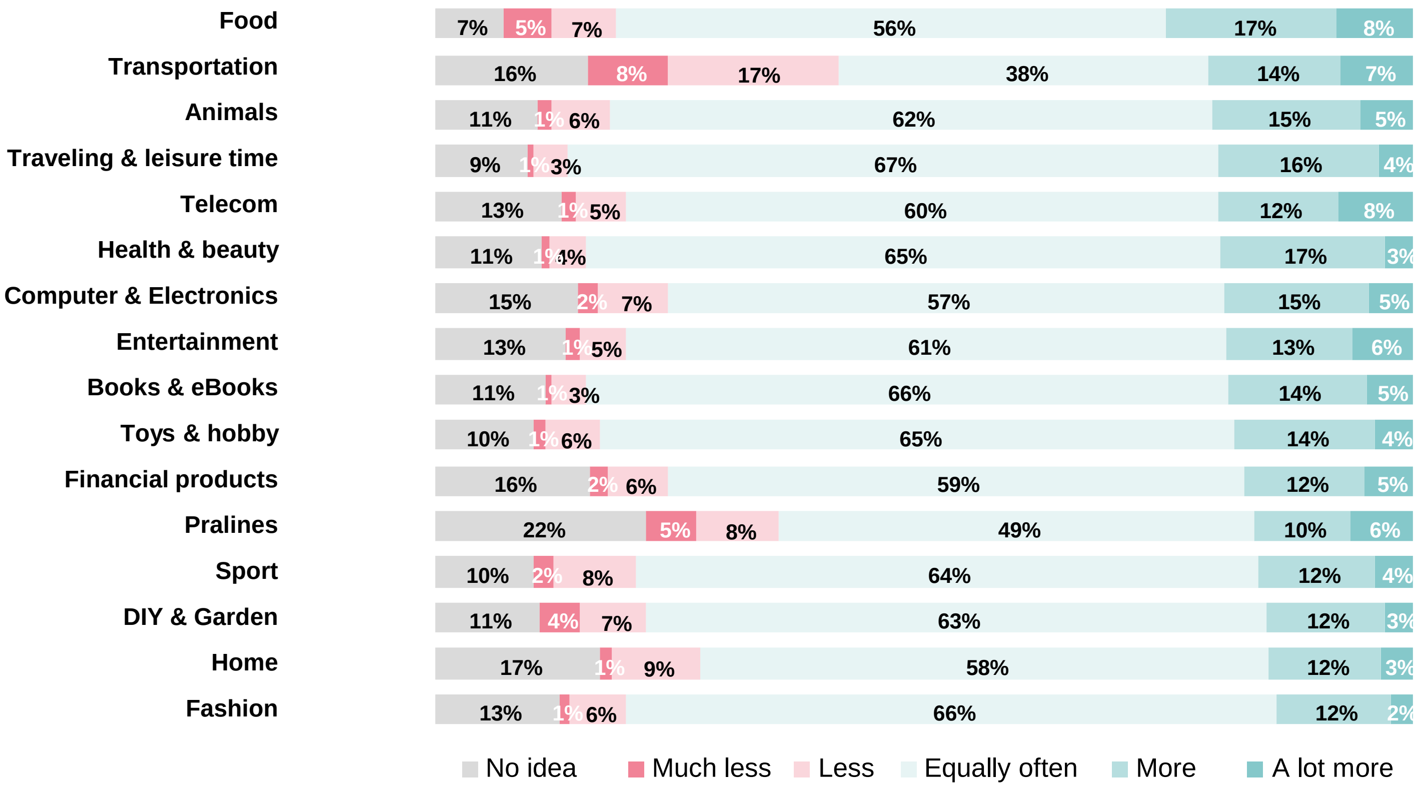
Online purchases

Future intention to buy

Q: Do you expect to buy <category> more or less often online in the future?

All categories can expect at least a 15% increase



Top 2% - would buy more

	2018	2017	2016
Food	25%	25%	12%
Transportation	21%	16%	26%
Animals	21%	17%	N.A.
Traveling & leisure time	20%	22%	23%
Telecom	20%	21%	16%
Health & beauty	20%	18%	25%
Computer & Electronics	19%	13%	22%
Entertainment	19%	19%	23%
Books & eBooks	19%	22%	28%
Toys & hobby	18%	17%	18%
Financial products	17%	7%	24%
Pralines	16%	17%	N.A.
Sport	16%	17%	19%
DIY & Garden	15%	15%	20%
Home	15%	10%	15%
Fashion	14%	15%	27%

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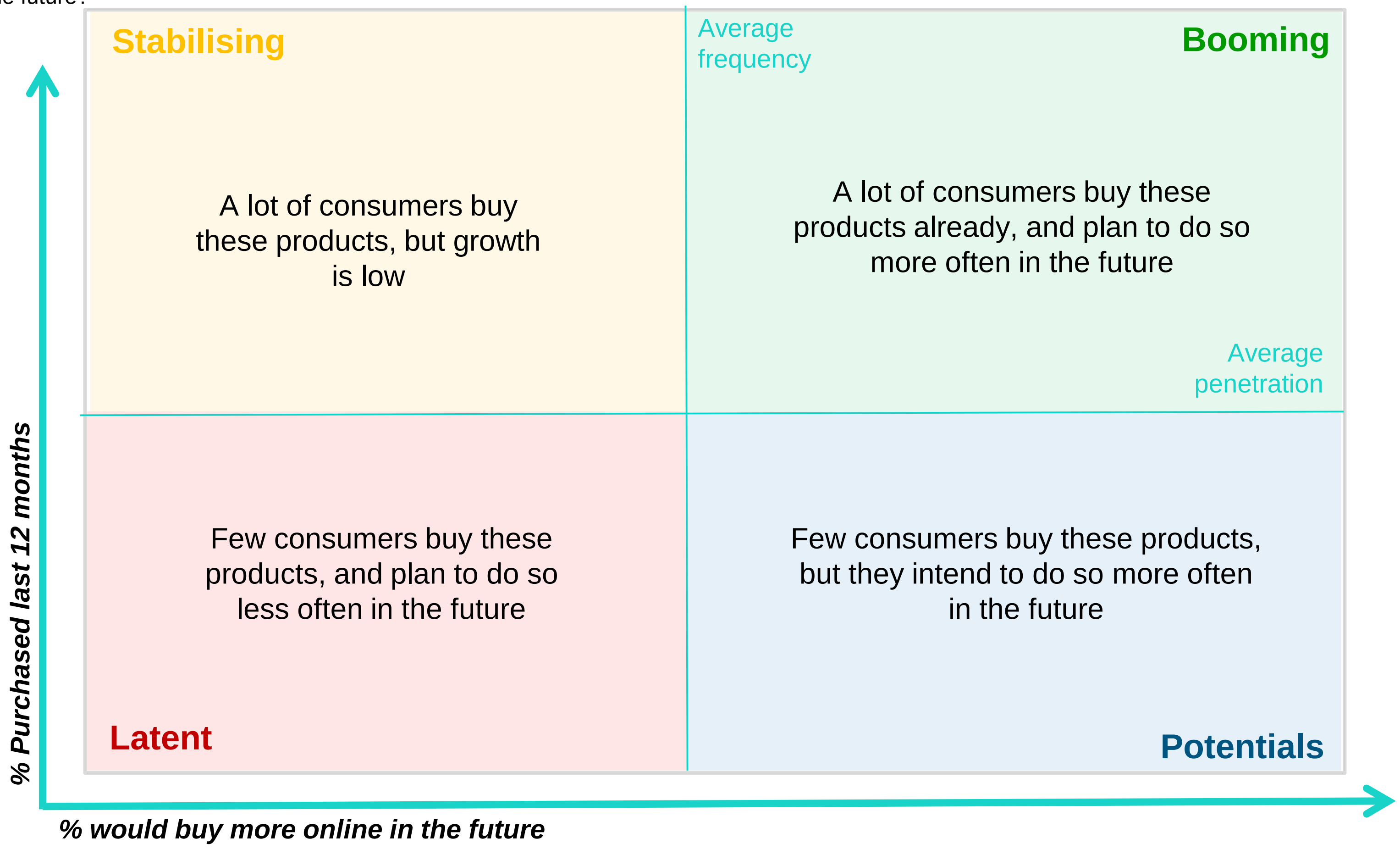
Online purchases

Quadrant methodology

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



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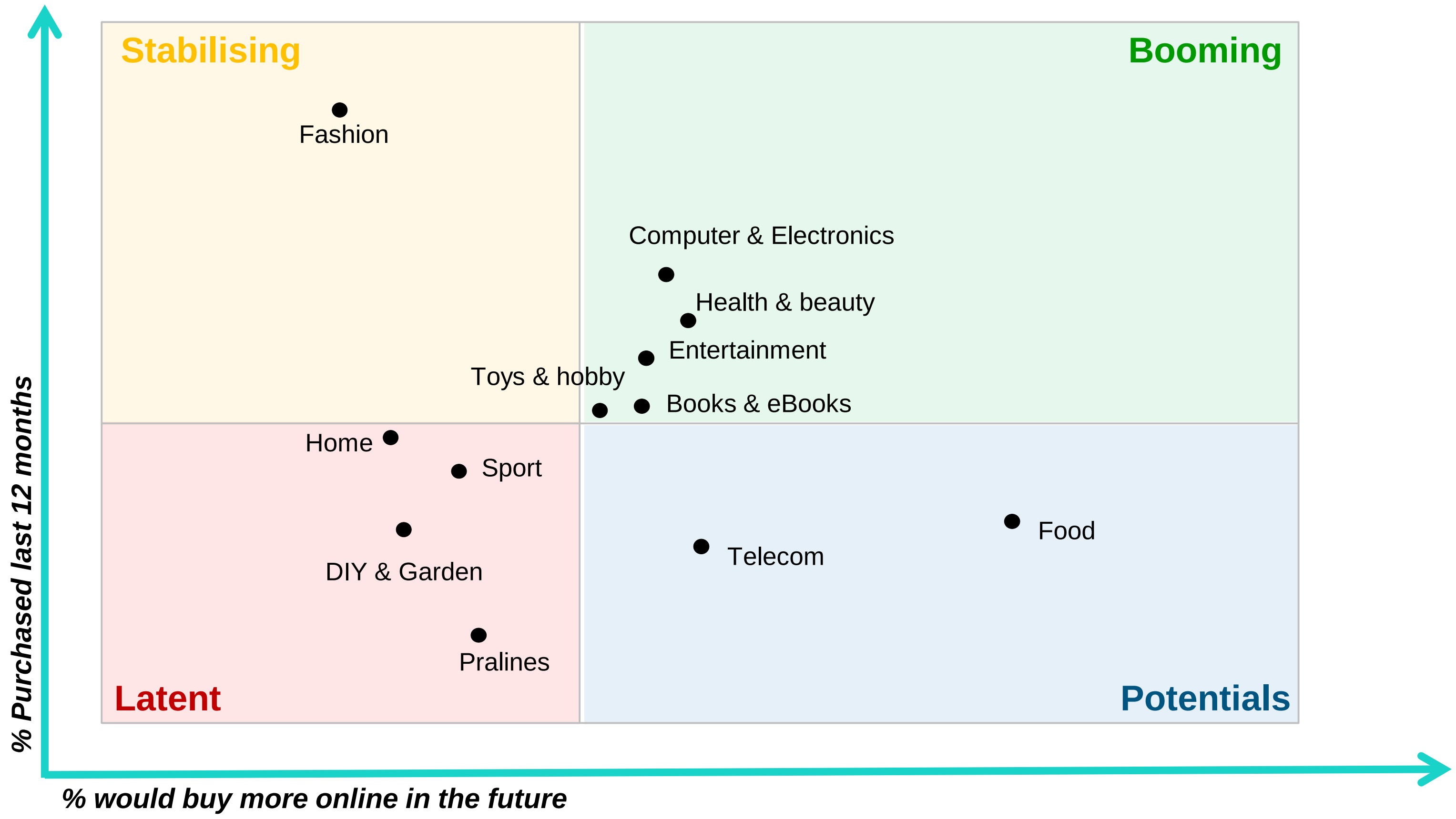
Online purchases

Quadrant 2018

Fashion has reached the critical mass

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



SECTOR FOCUS

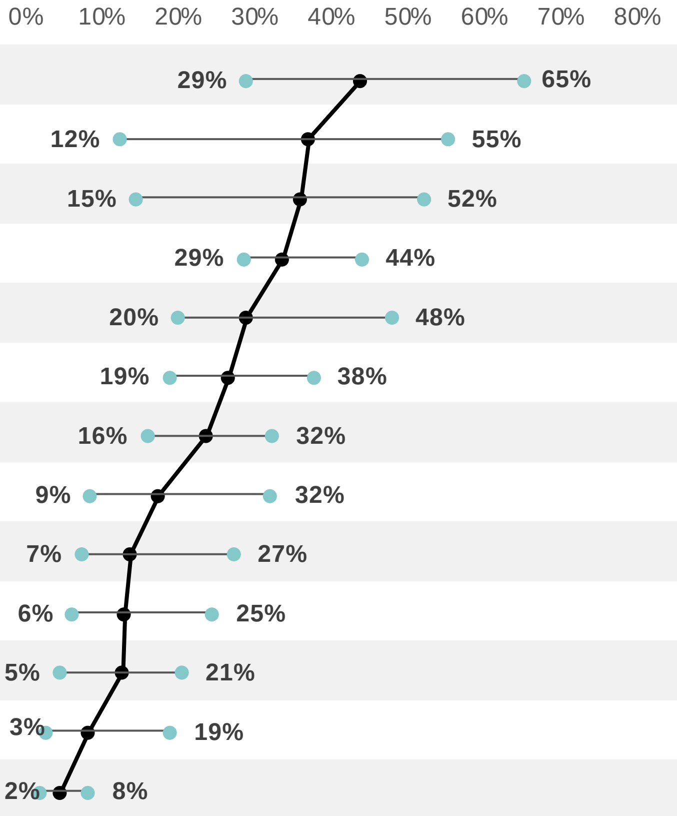
Sector focus

Drivers for E-commerce – per category

Various drivers across categories

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

	Min			Max
Because it saves time	Pralines	29%	65%	Food
Because it gets delivered to my door	Traveling & leisure time	12%	55%	Food
Because I can find products and services at lower prices	Food	15%	52%	Health & beauty
Because I'm able to shop 24 hours a day	Transportation	29%	44%	Telecom
Because I get access to special discounts, promotions...	Financial products	20%	48%	Health & beauty
Because I have a wider selection of products/services online	Food	19%	38%	Books & eBooks
Because I can compare and review different products/services	Fashion	16%	32%	Financial products
Because I avoid crowds	Health & beauty	9%	32%	Food
Because there is more product information online	Fashion	7%	27%	Financial products
Because I can see whether items are in stock	Financial products	6%	25%	Transportation
Because I get access to products/services that aren't available in my country	Telecom	5%	21%	Pralines
Because I can always send back the product within a fortnight	Traveling & leisure time	3%	19%	Fashion
Other reason	DIY & Garden	2%	8%	Food



- Time & Convenience
- Money
- Purchase Management

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Sector focus

Website Recommendation

Websites selling books most likely to be recommended

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

NPS (Top 2 – Bottom 6)

	0 to 6	Neutral	9 to 10	2018	2017	2016	2015	2014	2013	2012	2011
Total	14%	50%	36%	**22**	25	30	27	27	22	34	21
Books & eBooks	10%	43%	47%	**36**	28	37	33	34	34	39	24
Health & beauty	10%	50%	40%	**29**	27	44	33	26	12	39	37
Fashion	10%	53%	37%	**27**	21	27	24	31	18	25	18
Toys & hobby	12%	50%	38%	**26**	37	35	28	28	30	40	N.A.
Entertainment	12%	50%	38%	**26**	34	34	31	27	26	42	24
Computer & Electronics	12%	50%	38%	**25**	28	36	29	26	18	37	25
Sport	14%	51%	35%	**21**	33	32	23	32	25	52	2
Home	15%	52%	33%	**18**	17	18	15	2	10	5	6
Food	16%	52%	33%	**17**	16	33	35	37	42	40	41
DIY & Garden	17%	53%	30%	**13**	24	24	12	7	0	41	9
Telecom	22%	48%	30%	**8**	6	7	13	13	11	9	3
Pralines				**-2**	40	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

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Sector focus

Purchase amount

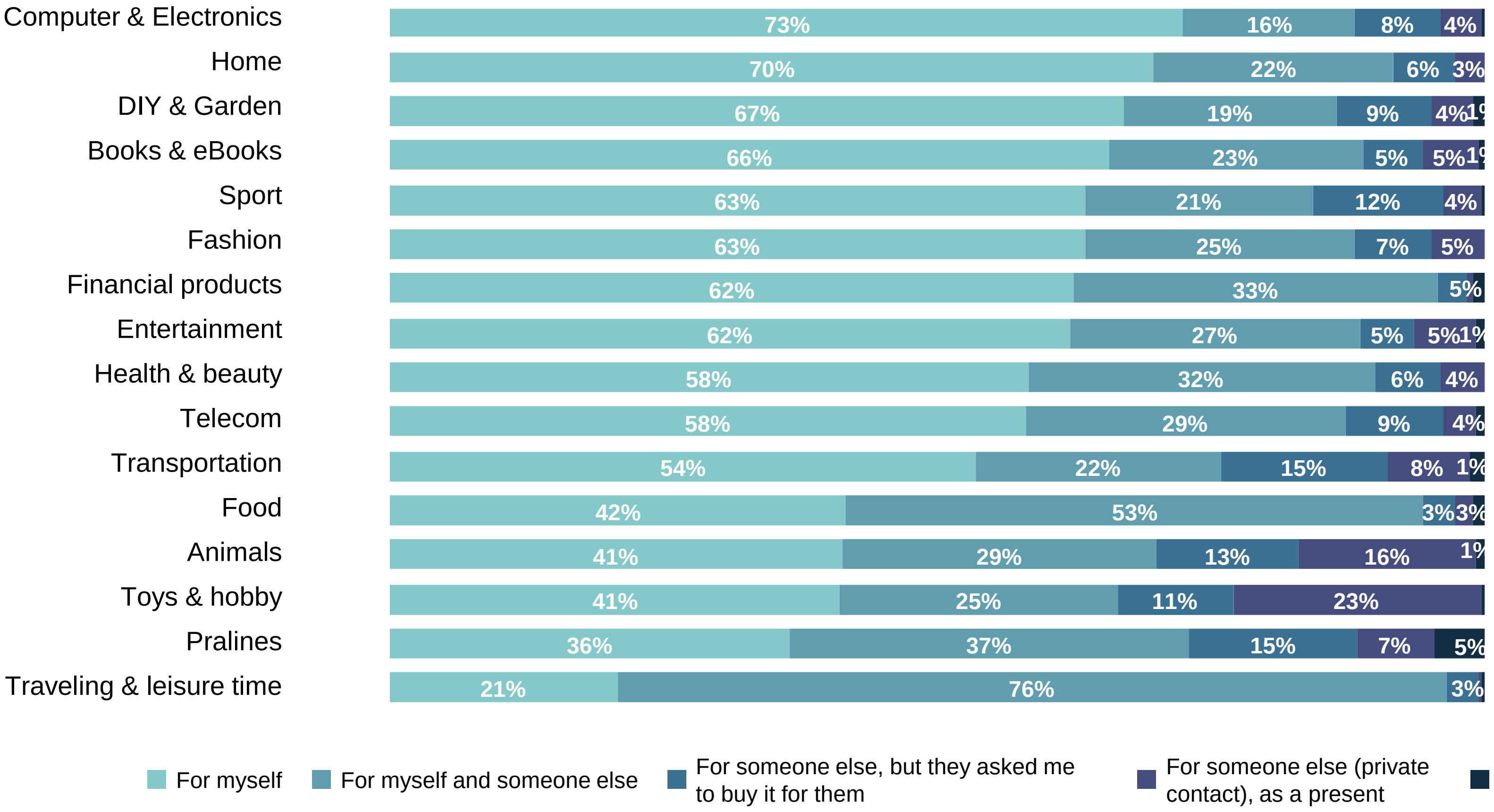
Q: How much money did you spend at your most recent online purchase?

	2018	2017
Traveling & leisure time	340€	316€
Computer & Electronics	238€	269€
Home	151€	142€
DIY & Garden	119€	147€
Pralines	93€	43€
Sport	79€	87€
Animals	75€	83€
Fashion	74€	74€
Telecom	74€	64€
Food	68€	71€
Health & beauty	61€	58€
Toys & hobby	56€	84€
Entertainment	43€	43€
Books & eBooks	31€	34€

Sector focus

Who are you buying for

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



	% for myself	% for someone else
Computer & Electronics	73%	12%
Home	70%	8%
DIY & Garden	67%	14%
Books & eBooks	66%	11%
Sport	63%	16%
Fashion	63%	12%
Financial products	62%	4%
Entertainment	62%	11%
Health & beauty	58%	10%
Telecom	58%	13%
Transportation	54%	24%
Food	42%	6%
Animals	41%	30%
Toys & hobby	41%	34%
Pralines	36%	27%
Traveling & leisure time	21%	3%

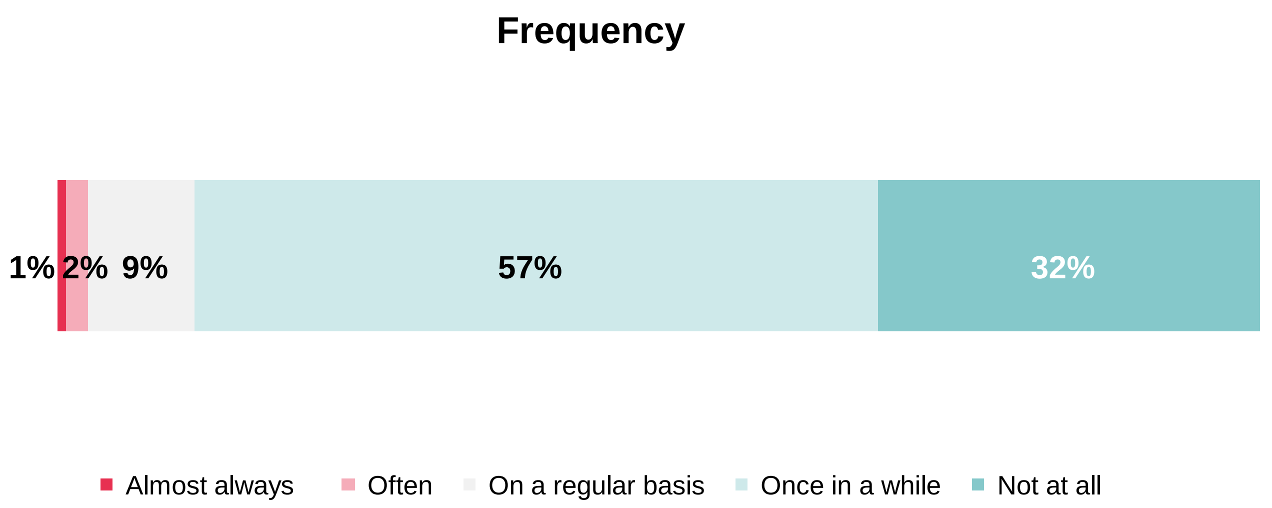
E-COMMERCE TRUST

E-commerce trust

Frequency of returning products

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

Almost 9 out of 10 rarely returns products



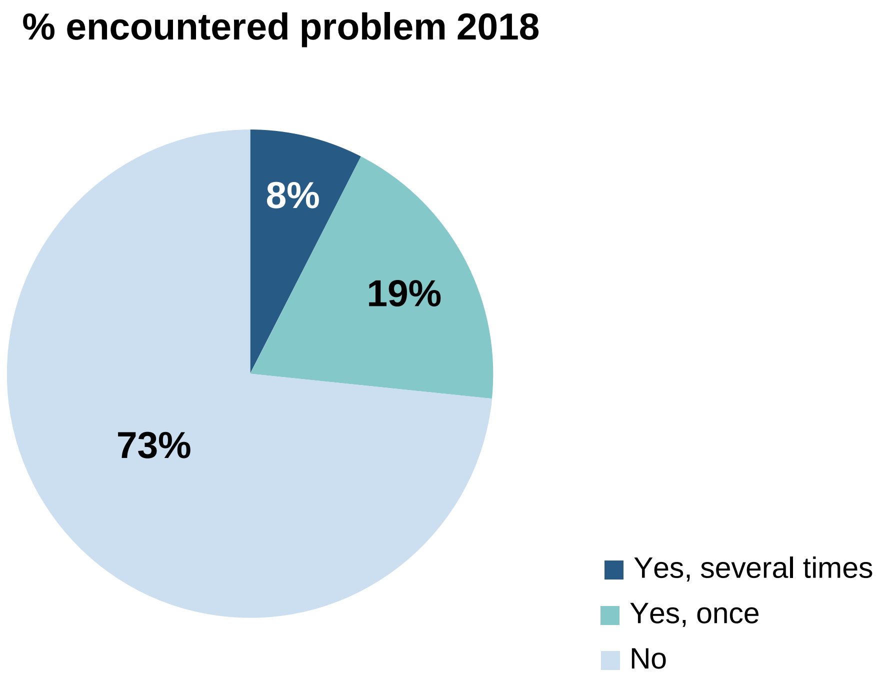
% top 2
(once in a while/ never)

2018	2017
89%	87%

E-commerce trust

Encountered problem (purchase)

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



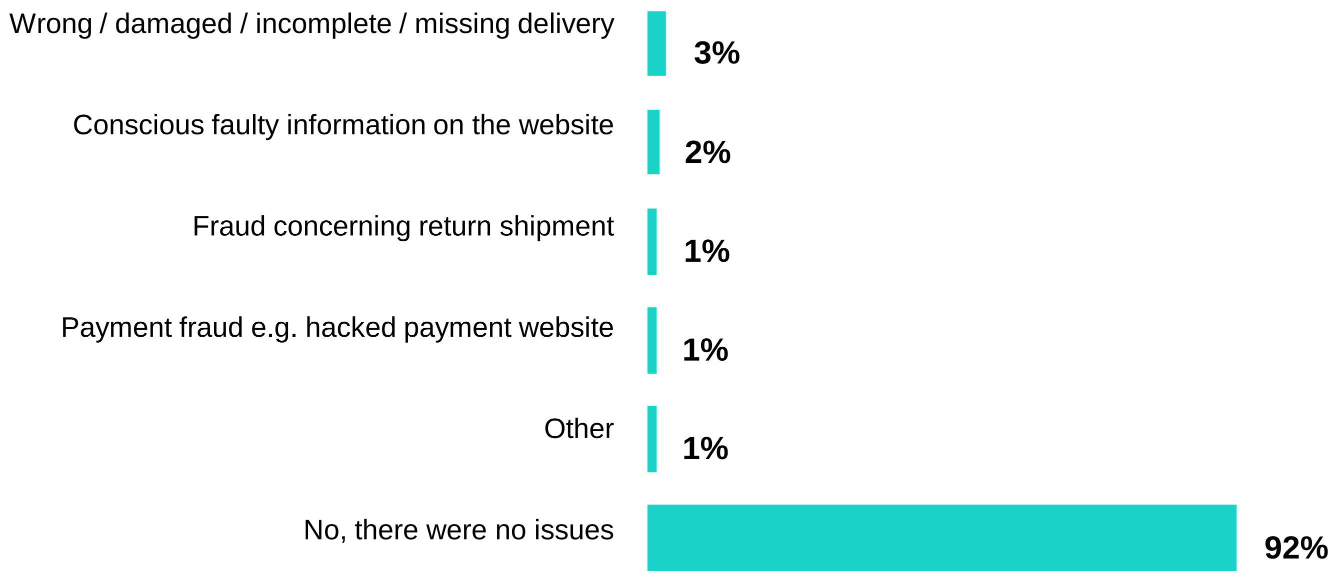
2017	
Yes, several times	**6%**
Yes, once	**17%**
No	**77%**

E-commerce trust

Encountered problem (delivery)

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

9 out of 10 didn't encounter any issue with the delivery



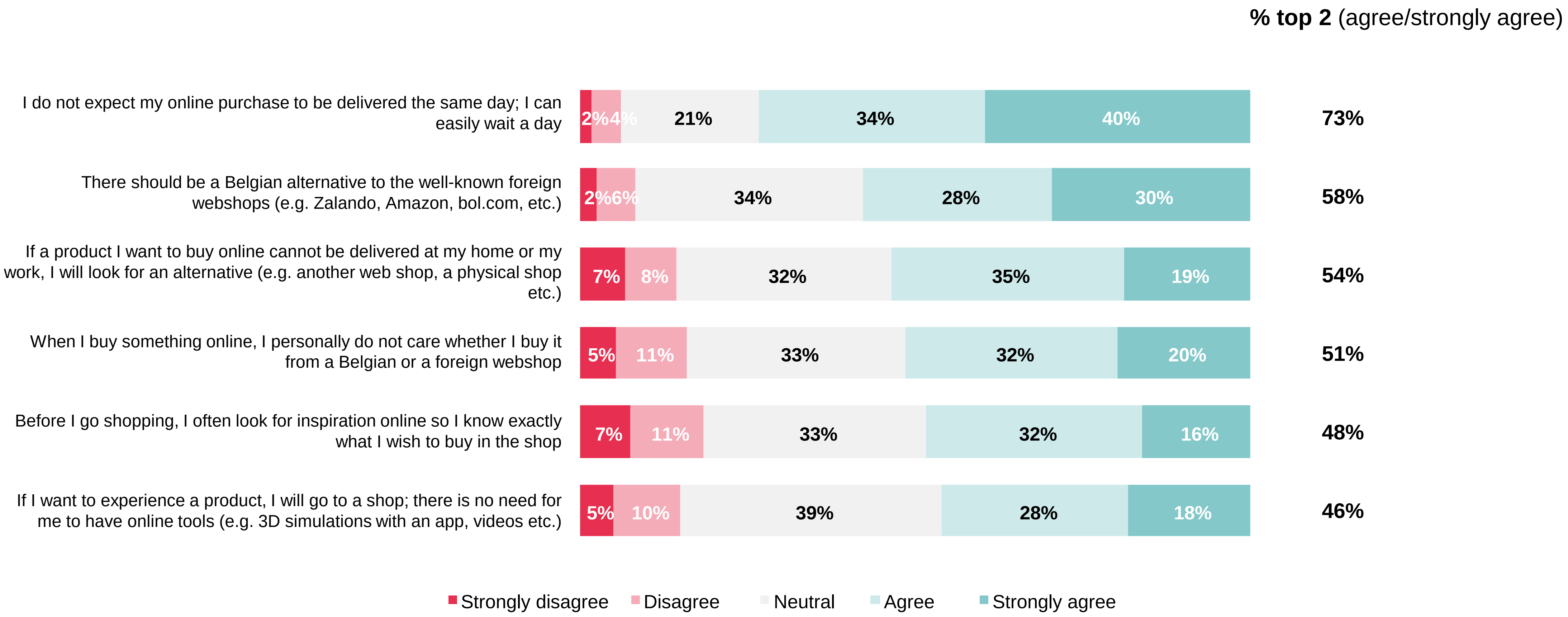
TRENDS & ATTITUDE

E-commerce trends & attitude

Details

6 out 10 wants a Belgian Amazon

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



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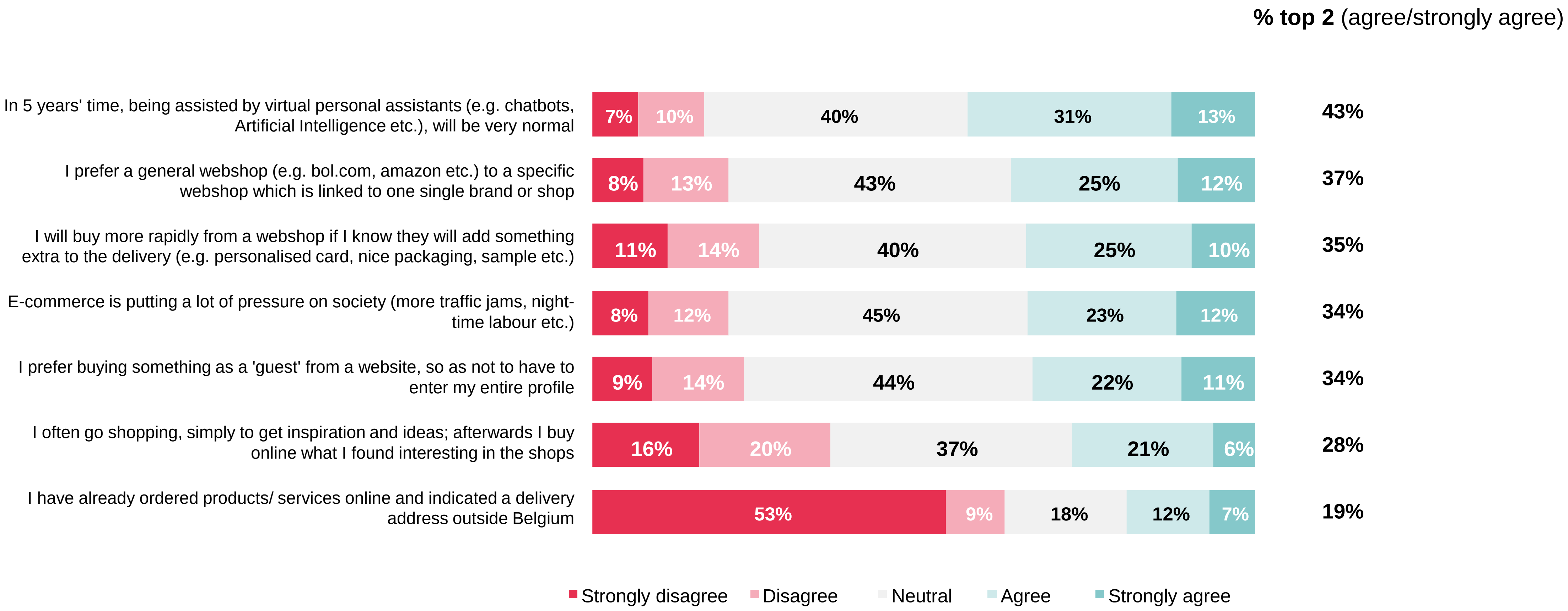
E-commerce trends & attitude

Details

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

Almost 1 out of 2 finds it normal to be helped by bots and virtual assistants



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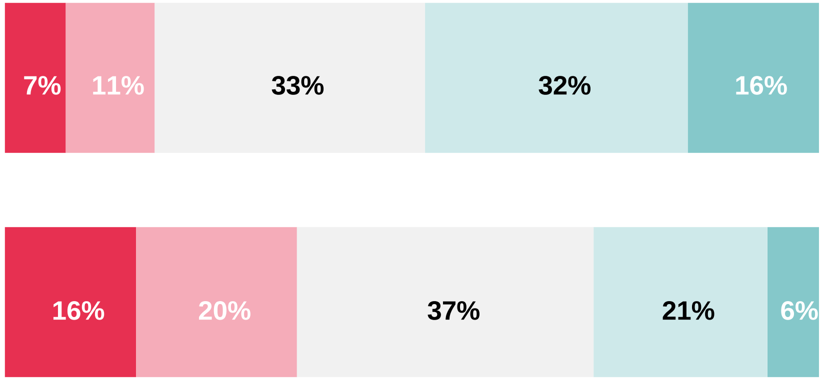
E-commerce trends & attitude

Difference

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

Webrooming & showrooming occur more frequently, showing importance of cross channel in practice



Strongly disagree Disagree Neutral Agree Strongly agree

% Top 2 (agree/strongly agree)

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

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ADDENDUM

for commerce
and services

List of categories (1)

Books & Ebooks

- Books
- EBooks

Entertainment

- Music on external carrier -e.g. CD, DVD, Blu-ray, etc.
- Digital music -e.g. mp3, etc.
- Music via online streaming services -e.g. Spotify, etc.
- Video -e.g. film, series, etc. on external carrier -e.g. CD, DVD, Blu-ray, etc.
- Digital video -e.g. film, series, etc.
- Video -e.g. film, series, etc. via online streaming services -e.g. Netflix, Stievie, etc.
- Games on external carrier -e.g. games for console, computer, etc.
- Digital games -e.g. paying games on smartphone, etc.
- Games via online streaming services
- Game consoles and accessories

Computers & Electronics

- Computer / laptop
- Computer hardware -e.g. printer, external hard drive, etc.
- Computer software
- Television
- Photo cameras and video recorders
- Household appliances -e.g. iron, hoover, microwave oven, etc.
- Electronics for personal car -e.g. electric toothbrush, razor, etc.
- Tablet
- Smartphone
- Tablet or smartphone accessories -e.g. charger, cover, etc.
- Other 'smart devices' -e.g. activity tracker, smart watch, e-reader, etc.

Telecom

- Telecom services -e.g. internet connection, prepaid card, etc.

Fashion

- Clothing
- Shoes
- Jewellery
- Leathers and bags -e.g. handbag, suitcase, sports bag, etc.
- Glasses –e.g. reading glasses, sun glasses etc.
- Other fashion accessories -e.g. watches, belts, scarves, etc. (NEW)

Toys & Hobbies

- Toys -inside and outside
- Dress-up clothes and party articles -e.g. carnival
- Hobby materials -e.g. painting, etc.
- Office supplier -e.g. paper, office material, etc.

Home

- Large pieces of furniture -e.g. sofa, bed, etc.
- Small pieces of furniture -e.g. side table, small cupboard, etc.
- Home decoration -e.g. candles, textiles, etc.
- Cooking material -e.g. pots, pans, etc.

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

List of categories (2)

DIY & Garden

- Tools -e.g. sawing machine, hammer, etc.
- Other DIY materials -e.g. wood, electrical cables, etc.
- Garden decoration -e.g. garden furniture, decoration articles, etc.
- Garden maintenance -e.g. lawn mower, maintenance products, etc.
- Flowers, plants, etc.

Food

- General food -supermarket
- Prepared food -e.g. takeaway, catering, etc.
- Meal packs, delivered in box -unprepared

Pralines

- Chocolates
- Chocolate tablets/bars (NEW)
- Other sweets (NEW)
- Chocolate figurines (e.g. Easter eggs, Valentine hearts etc.) (NEW)

Health & beauty

- Personal care products -e.g. hair products, creams, etc.
- Make-up and perfume
- Health products -e.g. food supplements, lenses, etc.
- Pharmaceutical products -not on prescription

Sport

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

Animals

- Food products
- Toys and accessories

Travel & Leisure

- Travel tickets -e.g. airplane, boat, train, bus, etc.
- Taxi and other transport services -e.g. taxi, car sharing, etc.
- Hotel/ overnighter bookings
- Restaurant bookings
- Tickets to events -e.g. festival, concerts, etc.
- Tickets to leisure time centers -e.g. cinema, fun fair, museum, etc.

Transportation

- Car
- Motorbike
- Bicycle

Financial products

- Bank products -e.g. current account, savings account, investment product...
- Travel assistance or cancellation insurance
- Other insurances -e.g. fire, vehicle, life, pension scheme...

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

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