



Belgian E-shoppers in 2020

**Evolutions & opportunities from a
shopper point of view**



2020 edition of the Belgian E-shopper Research

W – WHAT

- An online quantitative yearly monitor measuring the usage and attitudes of the Belgian e-shopper
- 4th wave

W – WHO

- National representative sample of Belgians 18+

W – WHY

- Identifying year-on-year evolutions from the perspective of the Belgian e-shoppers

W – WHEN

- Data collected in February 2020, right before ... you know what



The global health Corona crisis undeniably impacted Belgian consumer's life

- Working from home or not working at all
- (Partly) closure of schools, non-food shops and bars/restaurants
- Safety measures to consider when grocery shopping at supermarkets
- Social distancing measures
- Wearing face masks



What did the virus do to us as humans?

Waking up in a world where everything is or can be questioned

Worrying about things we never really had to worry about

Wondering what can comfort us given our limitations and insecurities



Source:
Global deck – Beyond research/Why5 (April 2020)



- No more instant gratification
- No more long term dream
- Too much time is boring
- Rediscovering slow
- Fluency & loss of structure

- Home as a new gateway to anything
- Survival indoor
- Redefinition of space: space becoming distance
- Have's and have nots

- Who am I in this new world?
- Who can I (not) be?
- How do others see me?
- Mental suffering
- No more touching

Time

Space

Identity

Our homes became the doorway to the world

Boost for digital and e-com



What you can expect:

1 Results of the E-shopper Research Pre-COVID19 situation

Source: 2020 edition of the Belgian E-shopper research - WHY5 Research, Safeshops

Impact of COVID19 on e-com Putting results in perspective 2

Source: Desk research , various sources

3 Opportunities for Belgian e-com in the post-COVID19 era



Let's dive in

1 Results of the E-shopper Research Pre-COVID19 situation

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Frequency and intensity of e-shopping

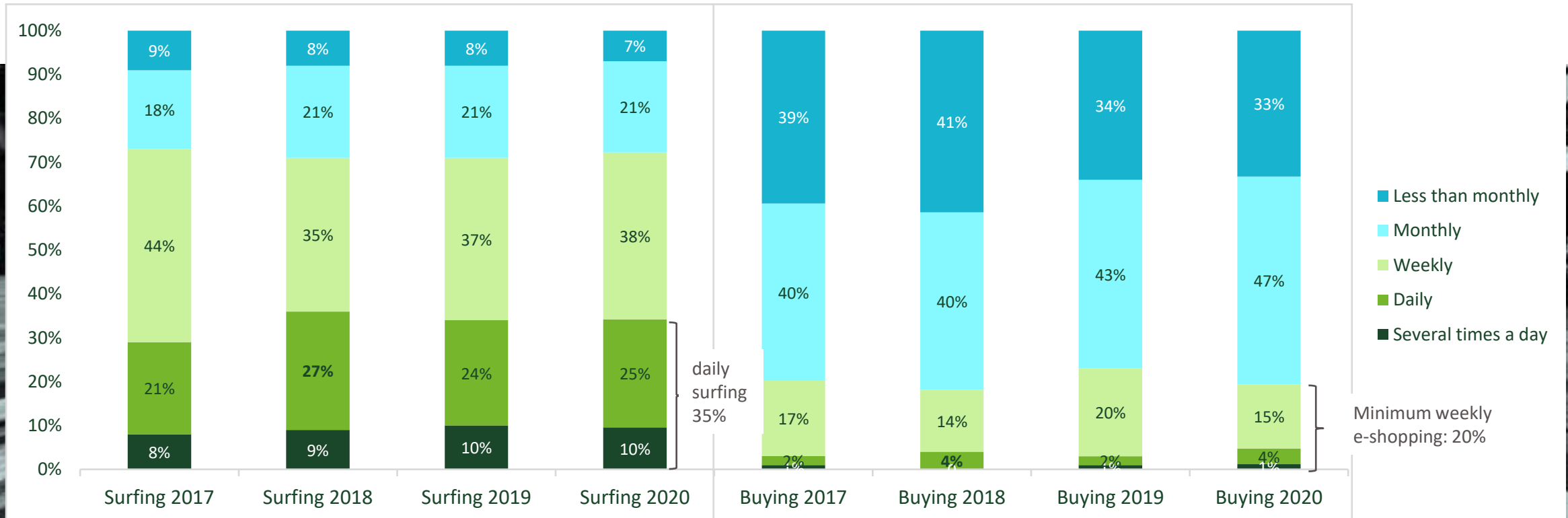
Situation pre-COVID19

35% visits a webshop at least once a day.
20% e-shops at least once a week.

Frequency was stable compared to 2019

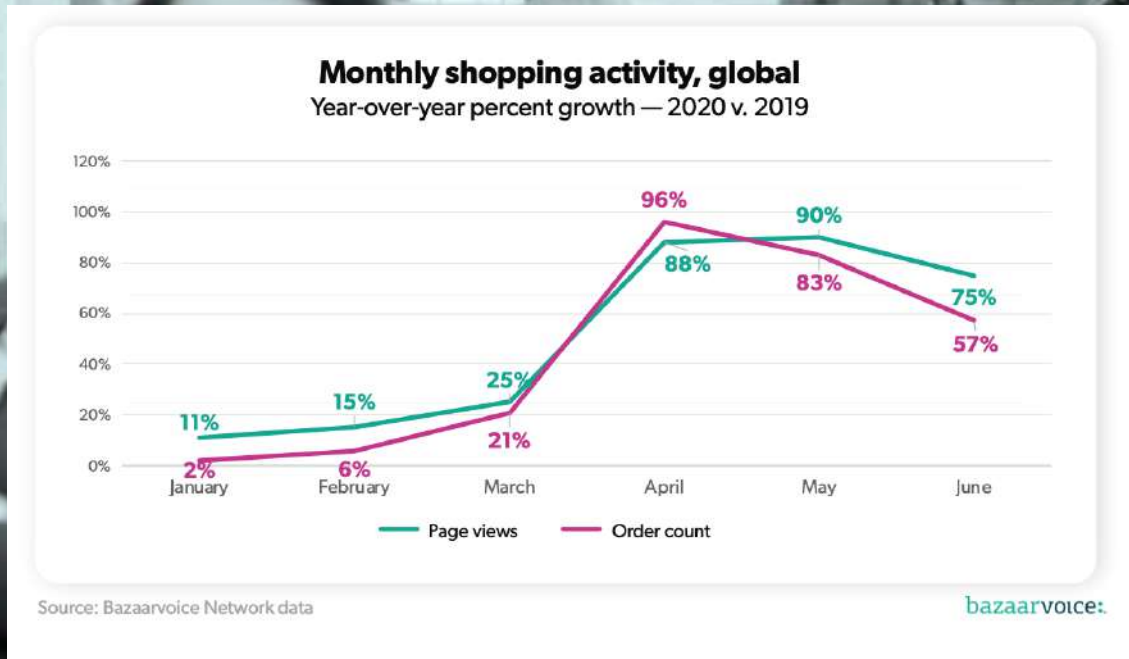
How often do you visit webshops?

How often do you buy something online?



Situation during-COVID19

- **Boost in online shopping activity.**
- **About 1 in 10 Belgians made their first online purchase during lockdown.**
- **60+ made up a large proportion of these new online buyers.**



12% of Belgian consumers bought online for the first time because of the lockdown

Source: Ipsos, Corona Survey Belgium April 2020

Source: Desk research

Situation pre-COVID19

Top 5 categories with highest e-shopping frequency:

1. Fashion (42%)
2. Shoes (30%)
3. Concert/film tickets (28%)
4. Travel / Trips (28%)
5. Airplane tickets (27%)



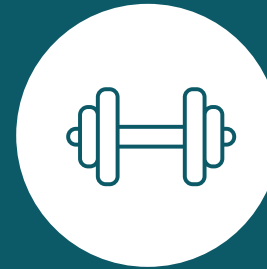
Categories with highest increase in frequent online buying since 2017

Which of these categories do you frequently buy online? (% often to very often)



FASHION

- Clothing 41% (+71% vs '17)
- Shoes 30% (+86% vs '17)



SPORTS EQUIPMENT

- 18% (+145% vs '17)



MEDICINE

- 16% (+145% vs '17)



HOME & GARDEN

- Home / garden decorations 12% (+89% vs '17)
- Home / garden furniture 9% (+106% vs '17)



Categories with highest increase in online sales during lockdown



FOOD & GROCERIES

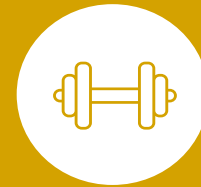


HEALTH & MEDICAL

- Handgels
- Painkillers
- Nose & throat sprays

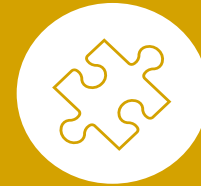


FASHION



SPORTS EQUIPMENT

- Dumbbells, yoga mats, running gear...



LEISURE & ENTERTAINMENT

- In-home: boardgames, books, e-games, kids toys...
- Out-of-home: gardening equipment, pools, trampolines...



ELECTRONICS & HARDWARE

- Home office electronics
- Ovens, freezers, bread baking machines...

Which of these categories will be able to maintain its success?



COVID19 installed e-shopping habits:

- 1. among a new demographic**
- 2. for new categories**

Retaining them will be the challenge

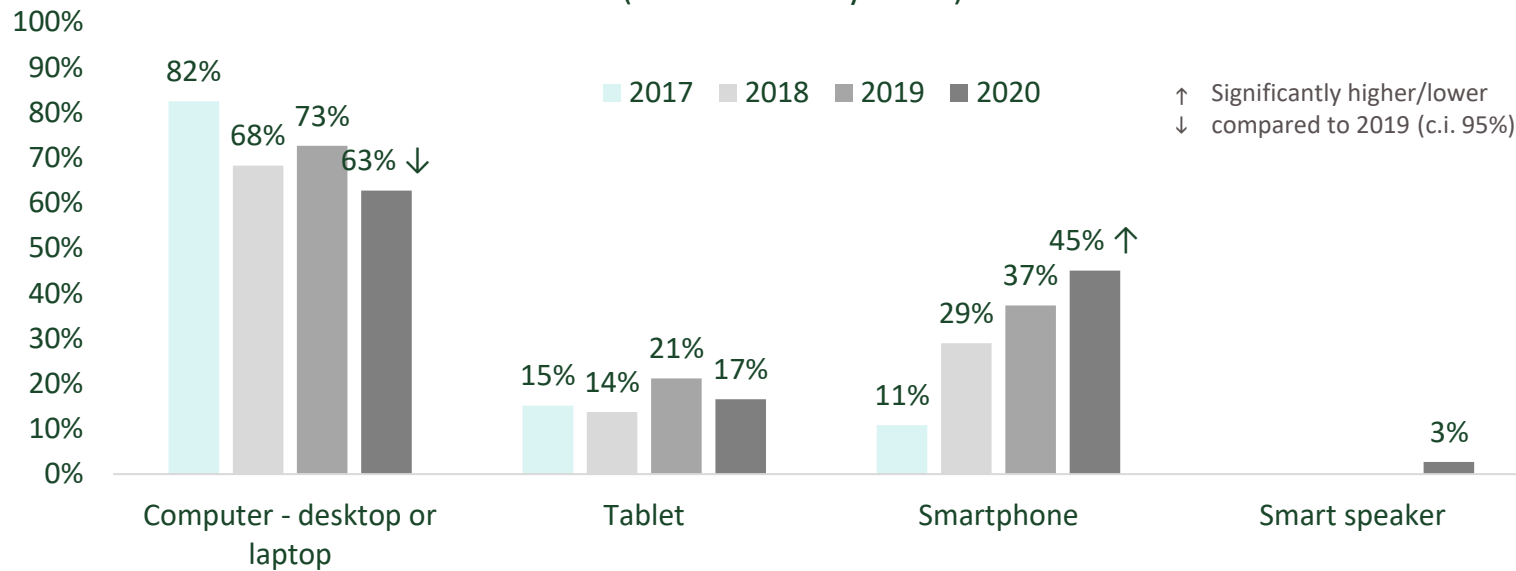


Devices used for e-shopping

Situation Pre-COVID19

Smartphone is still gaining importance as often used device for mobile shopping

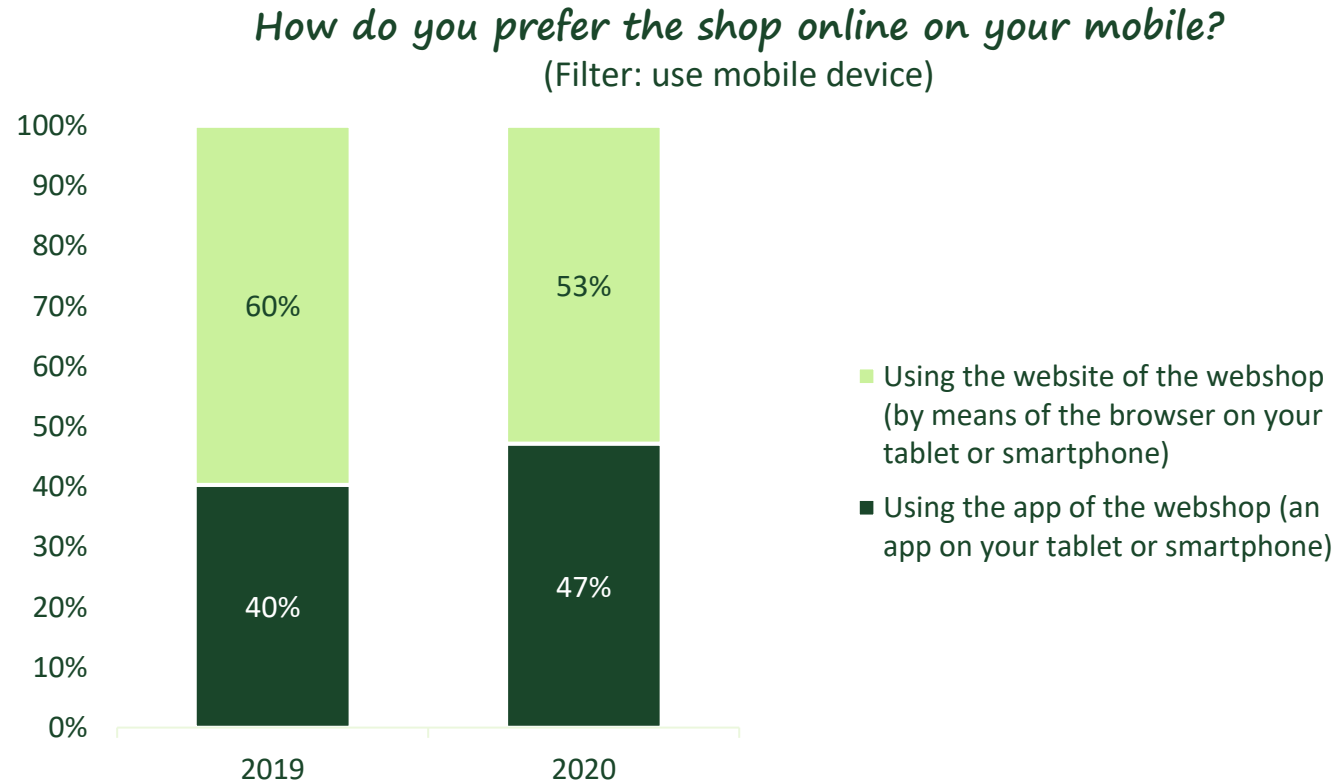
Which device do you frequently use when you shop online?
(% often to very often)



**45% of
e-shoppers
often uses
smartphone**

Situation Pre-COVID19

**Apps are growing in preference.
From 40% last year to 47% this year.
Apps generate a more positive user experience.**



Positive differentiators according to app users:

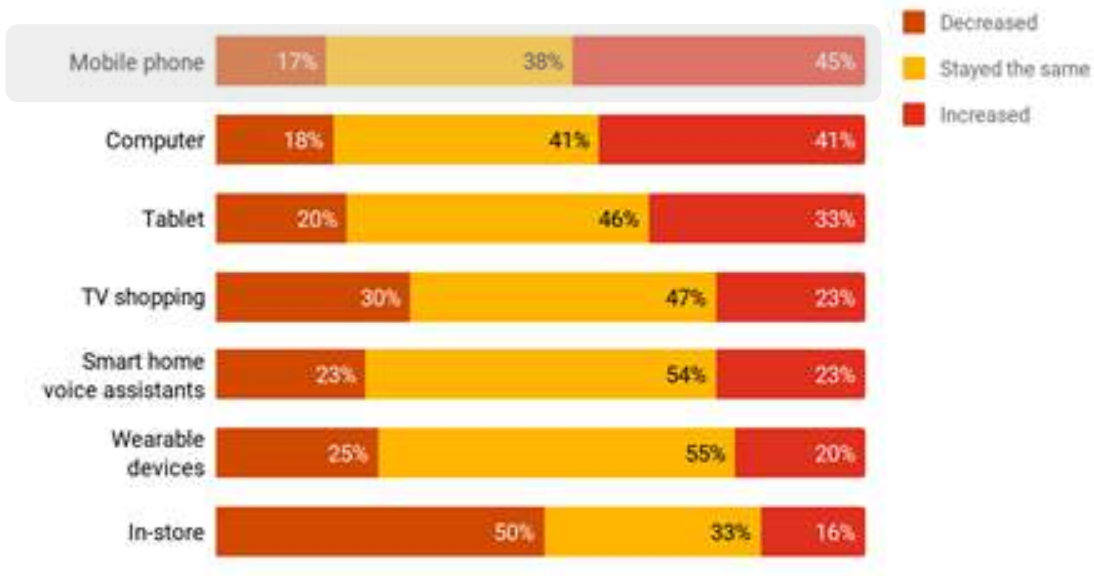
- 1) The Ease of use**
- 2) Apps are faster**
- 3) No repetitive entering of payment details**
- 4) No log-ins necessary**
- 5) Feels more personal**



Situation During-COVID19

- **Indications that mobile shopping (on smartphone) has increased even more during lockdown.**

After the COVID-19 outbreak, mobile shopping grew in popularity



Global Consumer Insights Survey 2020, PWC



Delivery

Situation Pre-COVID19

Doubts concerning online shopping have shifted from product quality issues towards worries about delivery.

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

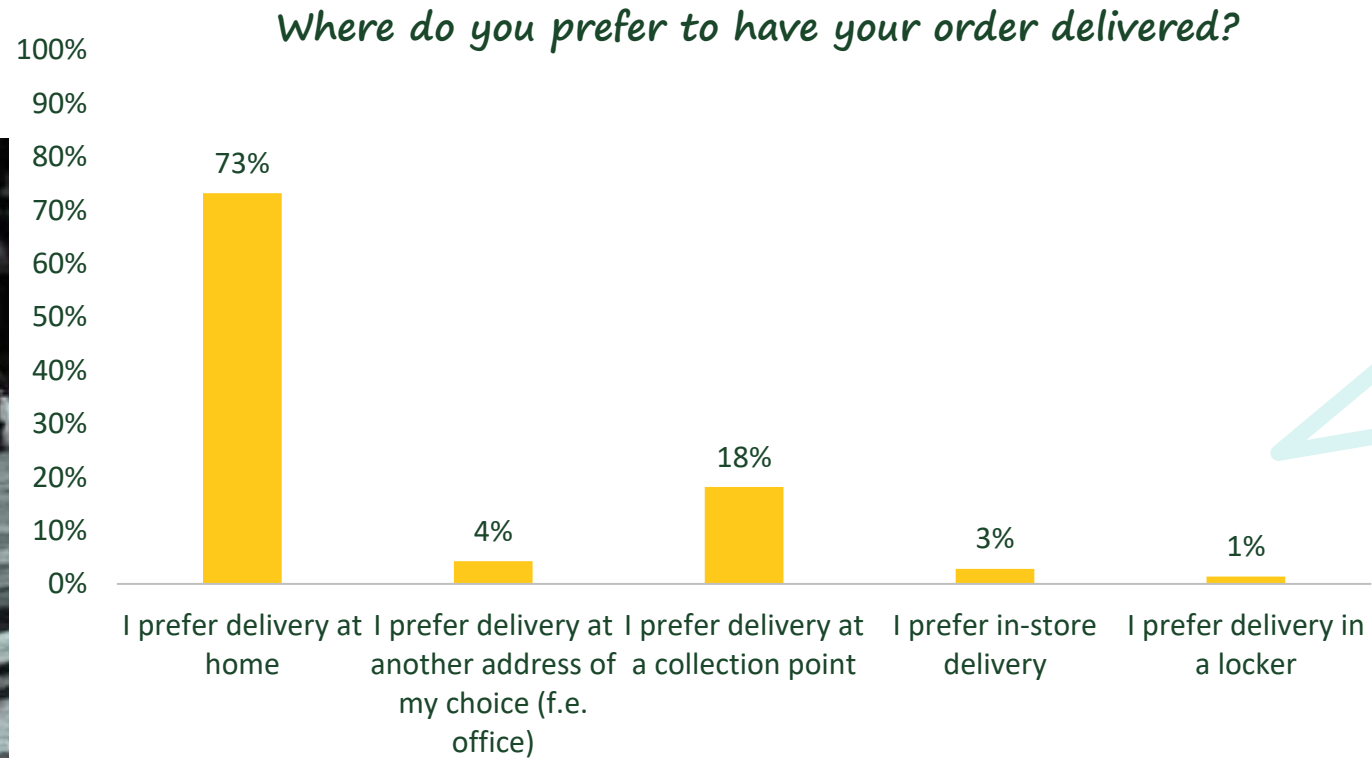
2020

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



Situation Pre-COVID19

Home delivery is by far the most preferred option.



7 out of 10 prefers home delivery.

If first-attempt delivery fails, half prefers delivery at collection point, other half near the house or at a neighbour

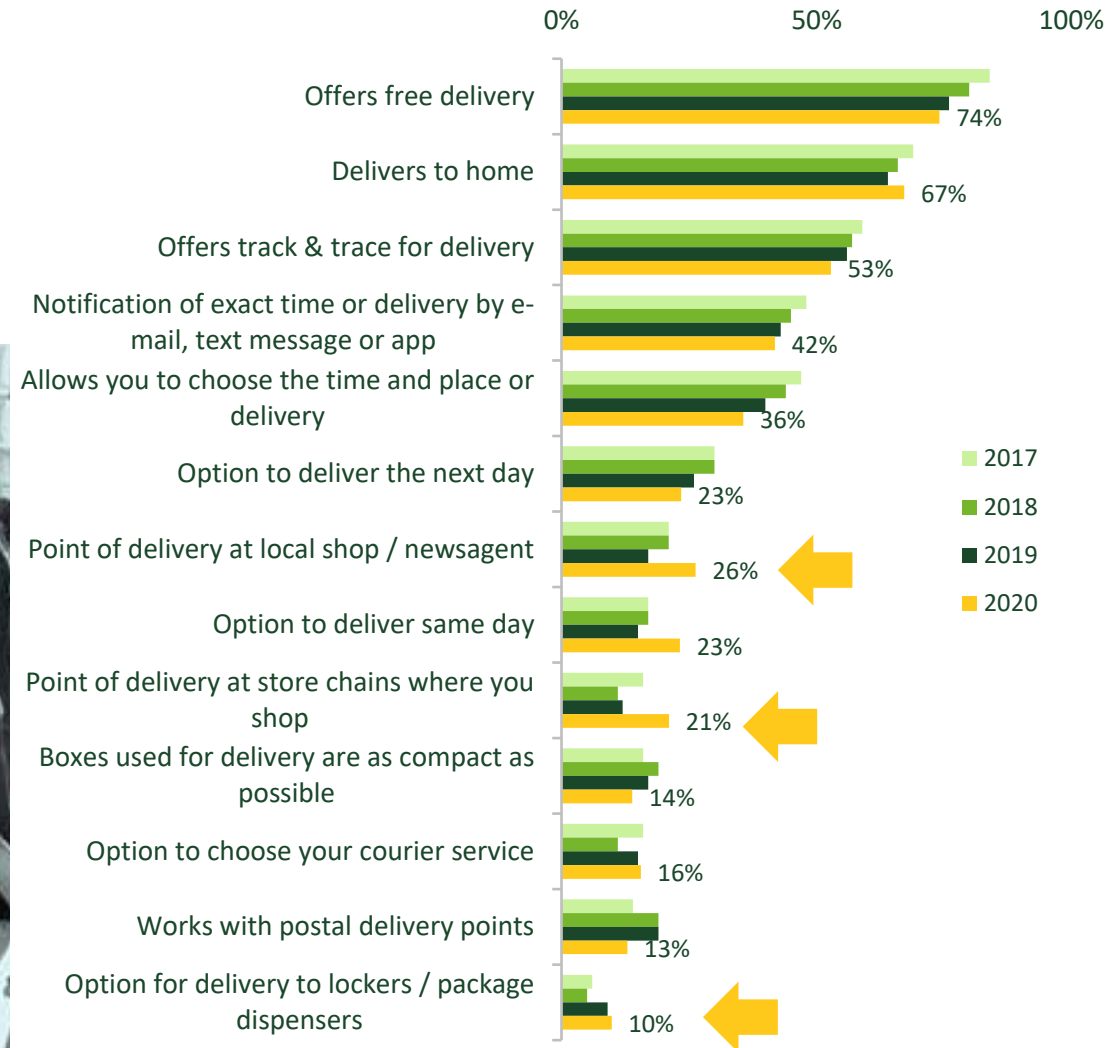
Situation Pre-COVID19

Trend towards broader range of possible delivery options

Some evolution in expectation pattern: same day delivery option has become slightly more important



Components of the ideal webshop in terms of delivery:



Source: 2020 edition of the Belgian E-shopper research - WHY5 Research, Safeshops

Situation During-COVID19

- **Home delivery and first-attempt deliveries boosted during first weeks of lockdown and led to higher client satisfaction**
- **Reduced-contact delivery solutions were discovered by clients**
 - Click & collect / Curbside pickup
 - Store locker Pick-up
- **Flexibility in delivery options provided by online shops were highly appreciated**
- **Temporary leniency towards longer delivery times**

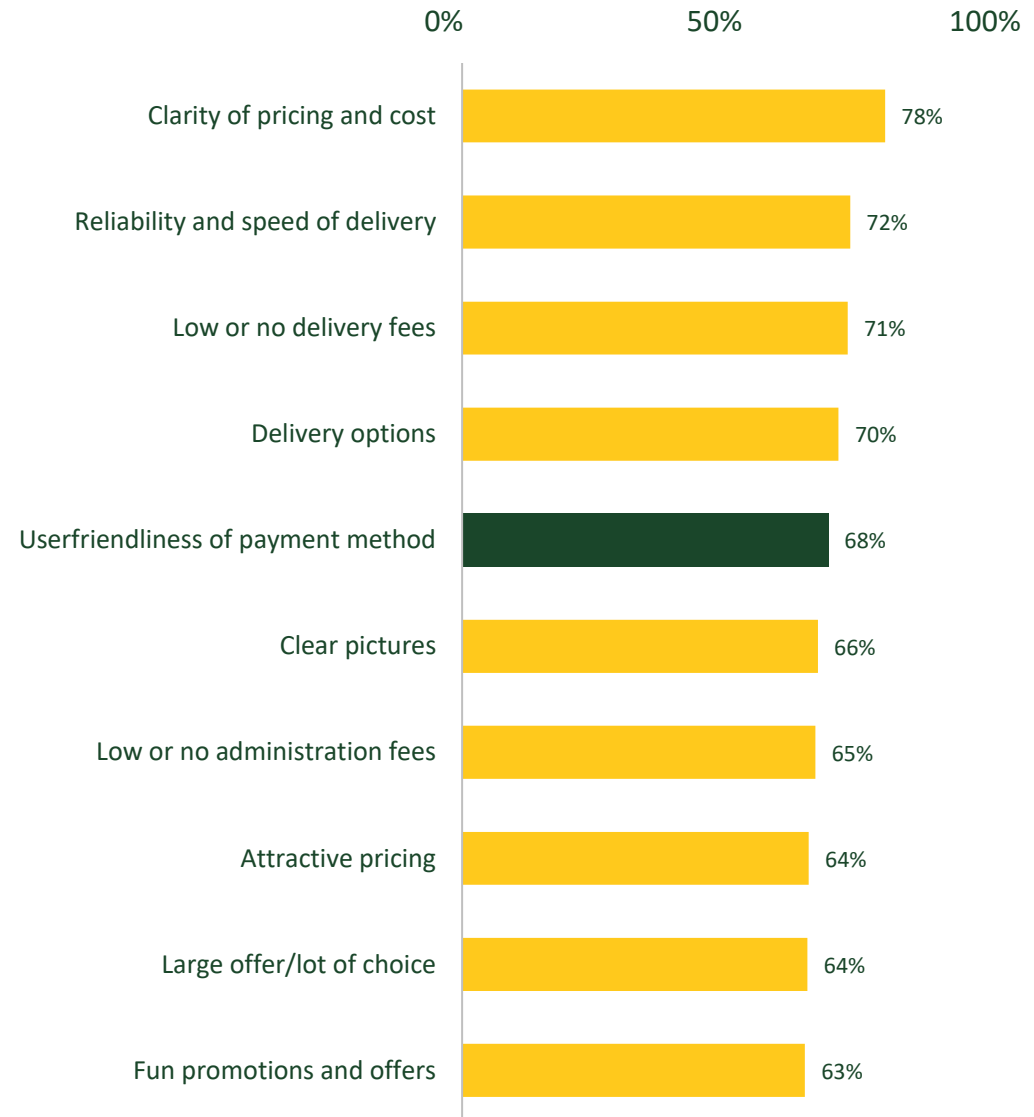


Payment

Situation Pre-COVID19

User-friendliness of the payment method remains an important qualifier in the whole end-to-end experience of online shopping

Which of the following elements are important to you when discerning between good and bad webshops?
TOP 10

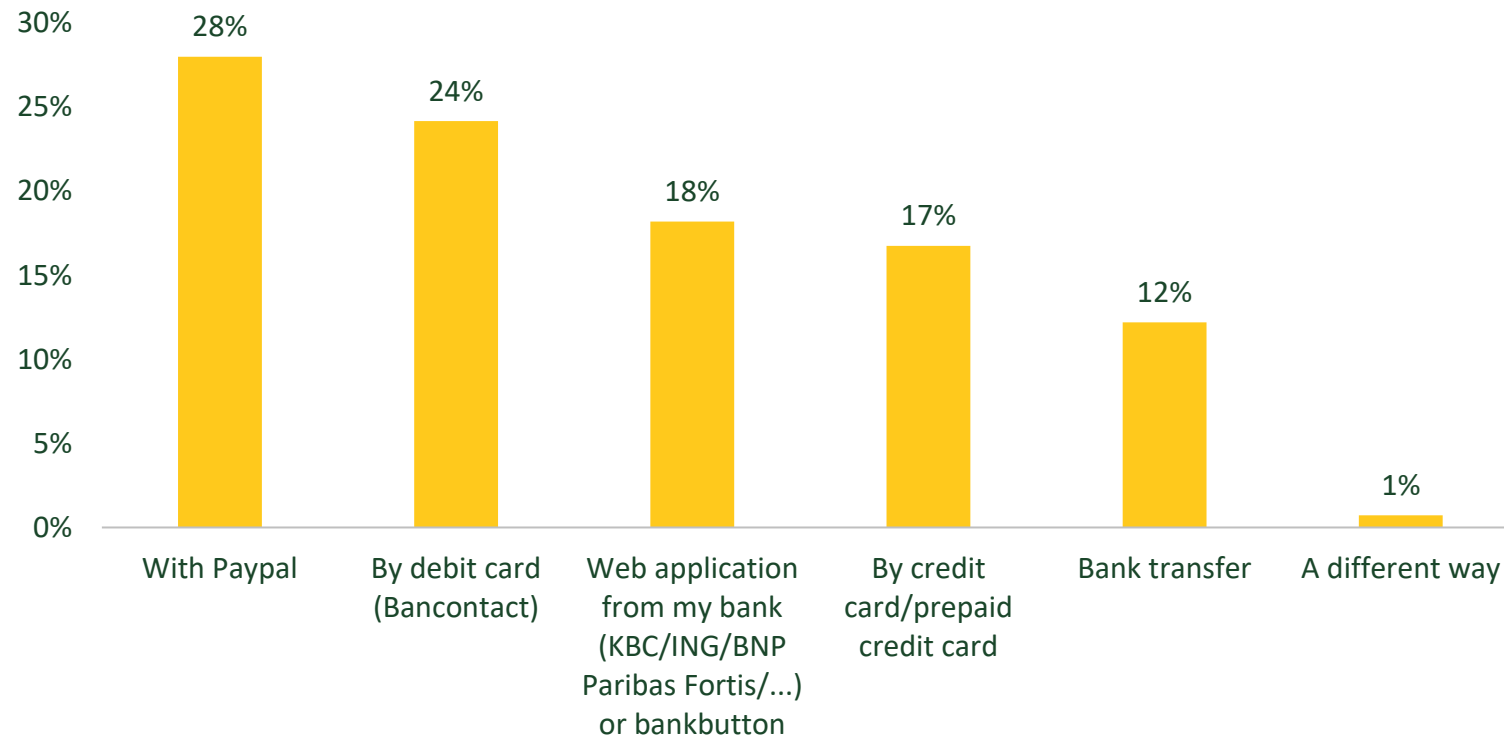


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Situation Pre-COVID19

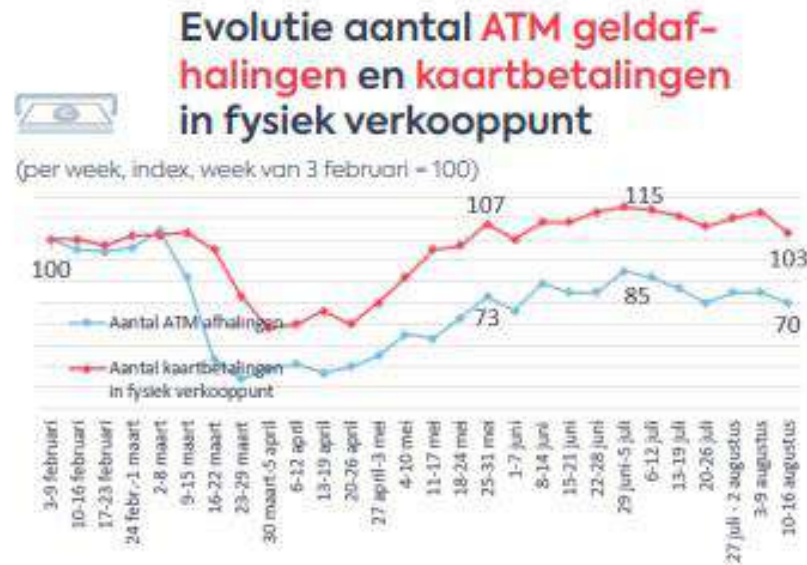
Paypal & Debit card payments are the two most popular paying methods

What is your preferred payment method for online purchases?



Situation During-COVID19

- **Increase in online payment & no-contact payments.**
- **COVID19 has lowered the threshold for online buying.**
- **Challenge remains to offer a seamless experience during checkout.**



Bron: Febelfin en Worldline (issuing).



3 Opportunities for Belgian e-com in the post-COVID19 era



COVID-19 crisis has accelerated some trends offering opportunities for e-com

1 Going local

2 Embracing digital

3 Choosing sustainable

5 ?

Opportunities for Belgian e-com in the post-COVID19 era

Going local

Lockdown increased appreciation for local (online) shopping

New online initiatives to support local business:

- **Koopinjebuurt.be** - official website of the **Flemish government**
- **Wijkomenterug.be** - online gift vouchers of local traders in order to help them bridge the period of lockdown
- Nsz, SafeShops.be & bpost gathered local businesses on the **‘We are local’-platform**
- **PuurGent** has set up a **website** that gathers all existing initiatives and platforms around local purchasing and takeaway
- Some **entrepreneurs** and **self-employed** set up **their own online webshop** or used **social media channels** like Instagram and Facebook

Belgians show solidarity to support local shops and domestic agriculture

76%

consider it **important to support local traders as much as possible** during the crisis

Source:
VLAM (June 2020)



Source:
wijkomenterug.be



Source: Desk research

Motivations for local (online) shopping during lockdown



HYGIENE



HEALTH



SUSTAINABLE
CONSCIENCE



SOCIAL



CONTROL



CONVENIENCE

Can be considered a checklist to build trust

Are you ticking the boxes?

Where can you make a difference?

How can you avoid the 'pity purchase pitfall'?

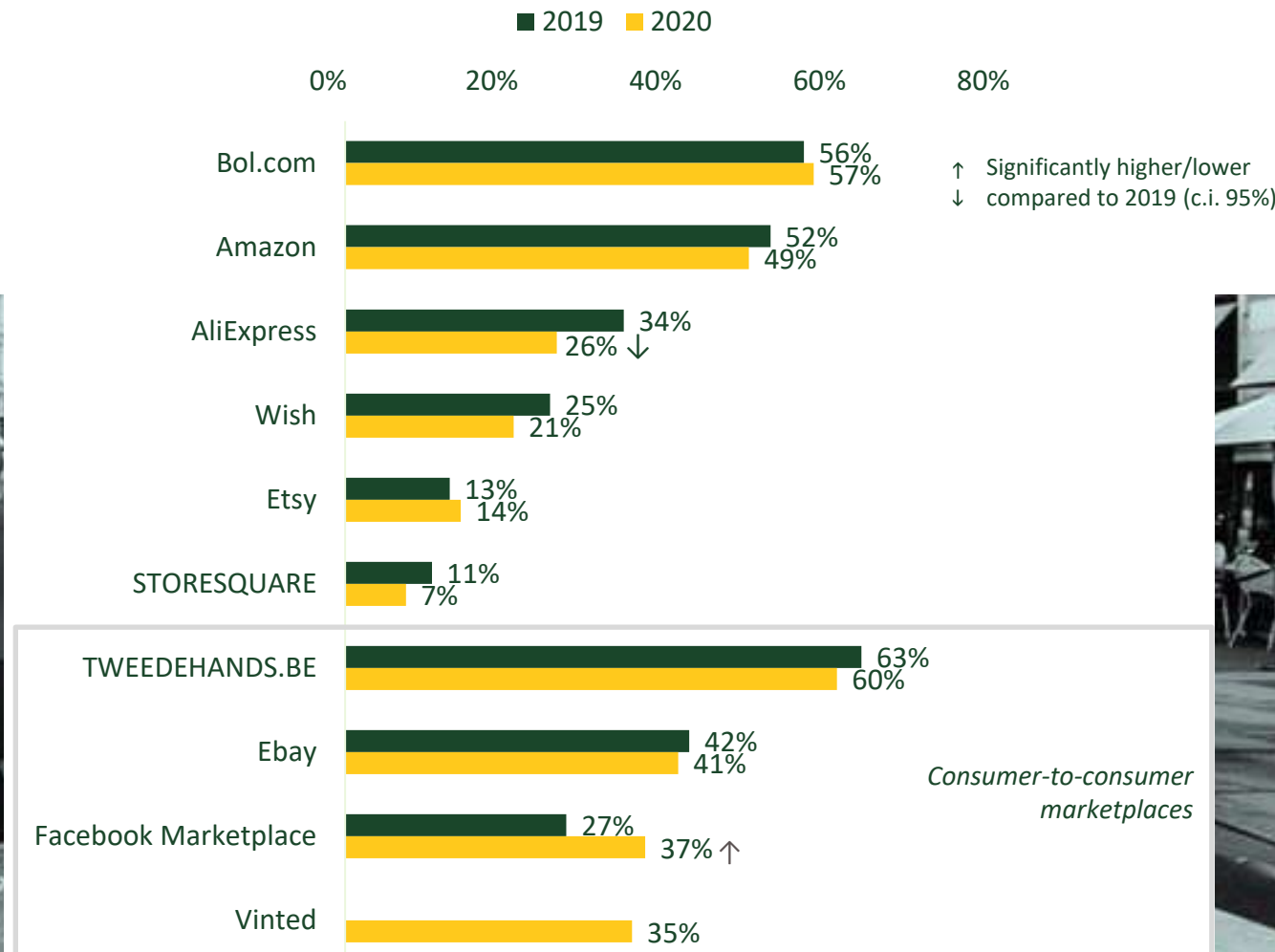


Situation Pre-COVID19

Pre-Covid, e-shoppers already felt more positive towards “local” marketplaces such as Tweedehands.be and Bol.com.

Challenge will be the retention of sympathy/solidarity for local/Belgian e-shops after the crisis. Will need to be more than “pity-purchases”.

*How do you feel about the following online marketplaces?
% positive to very positive*

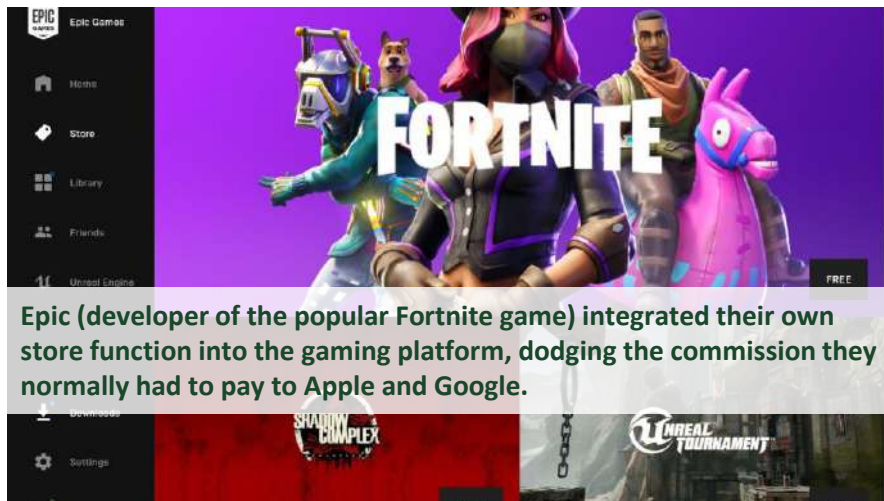


Opportunities for Belgian e-com in the post-COVID19 era

Embracing digital

Upcoming digital formats for e-com

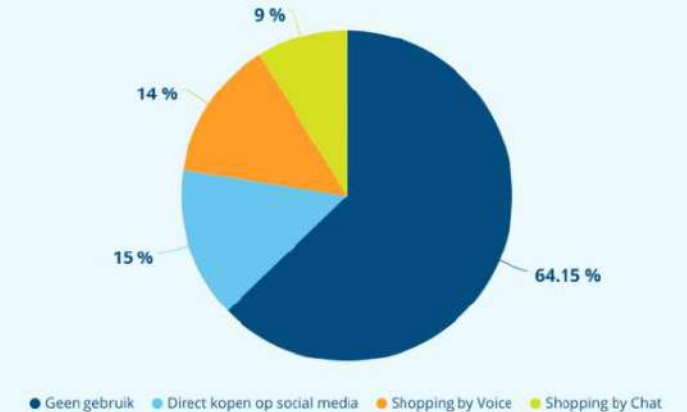
Social platforms are looking for ways to extend their reach into e-commerce via shoppable formats and storefronts within their platforms (e.g. TikTok 'shop now', in-app shop in Instagram)



Sources:
Salesforce - A Survey of 3,500+ Consumers Shows How COVID-19 Will Transform Shopping For the Long Haul (May 2020)
Capterra - Consumententrends 2020 (July 2020)
WARC – E-commerce and the future of effectiveness

Research in Europe (France, Germany, UK, Netherlands, Italy & Spain)

Gebruik Europese consumenten van opkomende e-shopping technologieën



Bron: Capterra online shopping onderzoek 2020, n= 5897 Multiple choice vraag, waardoor percentages niet op 100% uitkomen
Vraag: Heb je wel eens gewinkeld met een van de volgende, opkomende technologieën?



Source:

Capterra - Consumententrends 2020 (July 2020)

US figures show that 63% of U.S. Millennials has made a **purchase over social media** since the onset of the pandemic

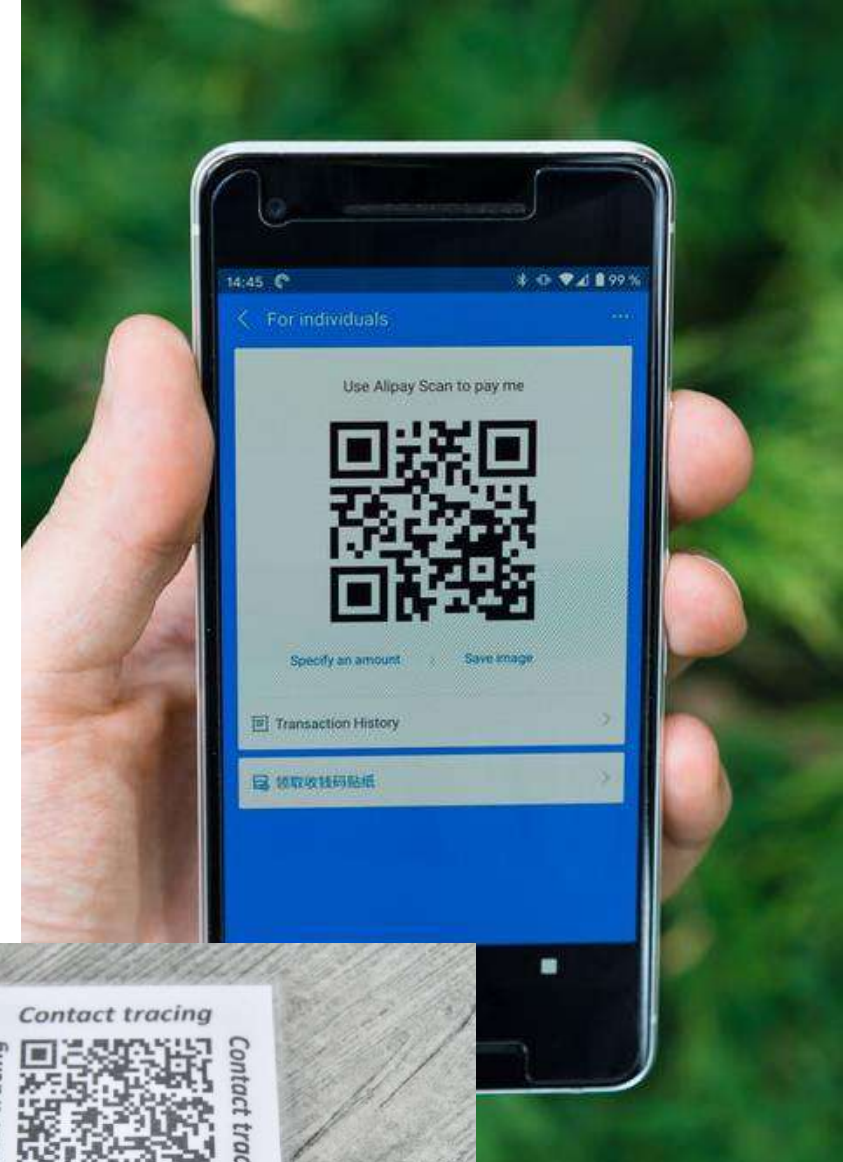
Source:

Salesforce - A Survey of 3,500+ Consumers Shows How COVID-19 Will Transform Shopping For the Long Haul (May 2020)

QR-codes

The mandatory registration of horeca visits increased the familiarity of QR code scanning

- This increased familiarity can have a positive effect on generating traffic to online or enhance experience during off-line shopping (e.g. “other items you might like”, “available in other colors in our webshop”, ...)



Opportunities for Belgian e-com in the post-COVID19 era

Choosing sustainable

Sustainability is gaining importance in the online decision-making journey.

48% rates sustainability as an important element that discerns a good webshop from a bad one.



Currently no e-com supplier is differentiating on sustainability

“
Which webshop comes to mind when thinking about sustainability
”

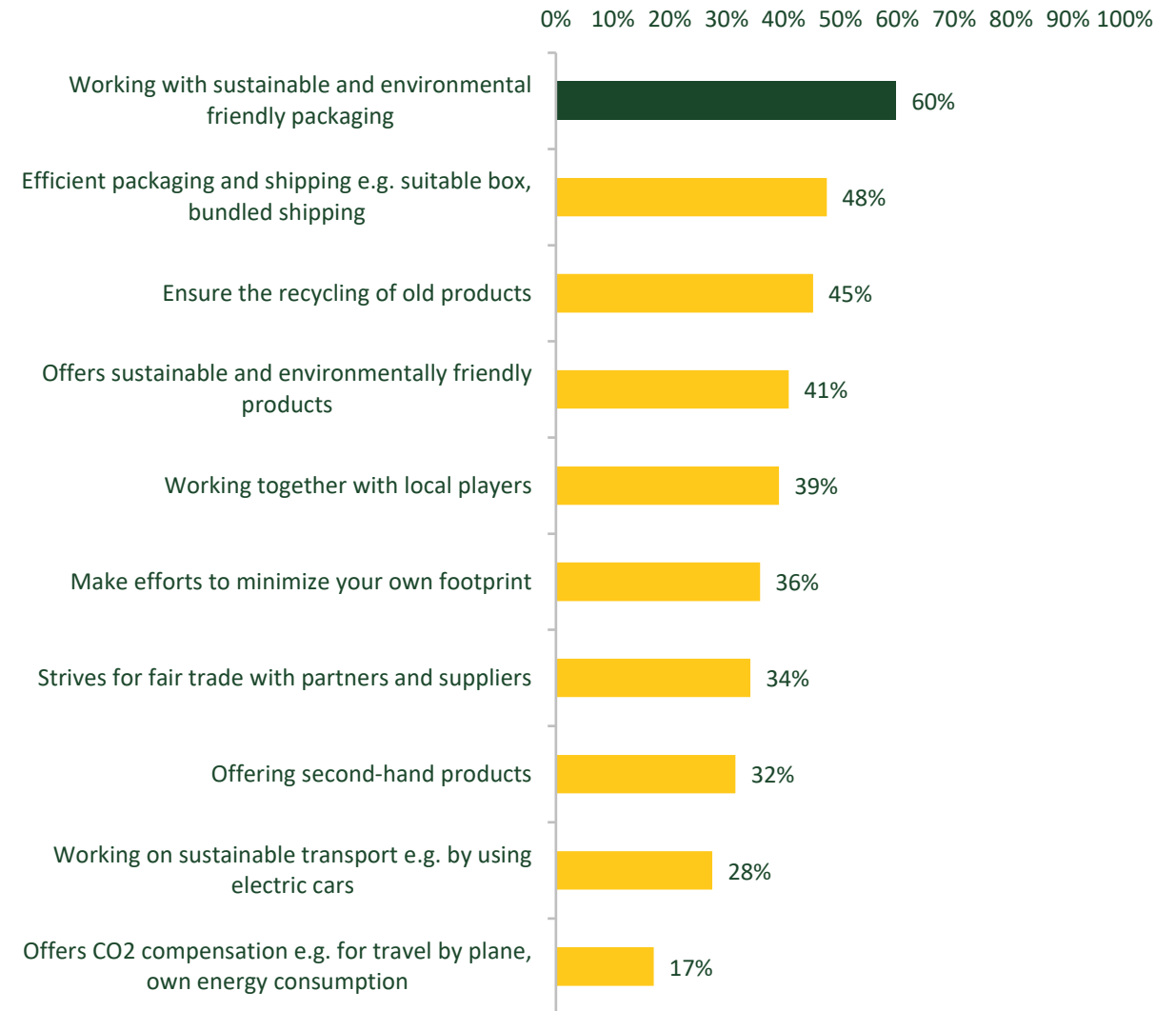
50%
can't name one
↑



When thinking about sustainability in the context of webshops, sustainable and eco-friendly **packaging is the main element that comes to mind, followed by efficient delivery.**



What should a web shop focus on to be sustainable?



Delivery is an important second ‘moment of truth’ with packaging as a key touchpoint and unboxing a key brand opportunity to stand out.



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Thank you,

And let's talk!



The Belgian E-shopper 2020 research

Was presented to you by:



Thanks to these partners!



To find out more about The Belgian E-shopper research, reach out to

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