

BELGIUM REPORT

# **E-SHOPPER BAROMETER 2023**



# EXECUTIVE SUMMARY (1/2)

## 1. E-commerce in Belgium – rather stable in 2023

- Slightly more Belgian e-shoppers in 2023 than in 2022
- While the share of regular e-shoppers tends to mildly decrease in 2023, they still represent almost half of e-shoppers.
- They receive more monthly parcels this year (5.1 vs 4.2 in 2022), but their online purchases account for less in their overall shopping.
- They overall purchase online as many categories as last year, with more beauty and health care products.
- Belgian regular e-shoppers are even more convinced by e-commerce this year, which reduces the stress of shopping and saves time.

## 2. Belgian regular e-shoppers are more price sensitive than before

- With the high inflation, their level of price sensitivity is getting higher in 2023:
  - 64% of regulars claim that price is the most important factor when buying.
  - Free delivery is even more important driver than before, and price-related online purchase dissuasive effects are as important as before.

## 3. Usage of C2C platforms and e-shopping through social media is still very high in Belgium

- As in 2022, 76% of regular e-shopper claim that they use C2C platforms for buying or selling products, and almost 3 in 10 Belgian regular e-shoppers claim they have increased their second-hand product purchases.
- Yet, C2C platform users are less likely to use these new e-commerce methods to only sell products, and also buy less frequently than before.
- For those who purchase secondhand products, economic reason comes first above all.
- For sellers, freeing up space at home, selling products in good condition and saving/earning money remain the top drivers.
- As observed last year, social networks continue to be widely used for shopping purposes (by 6 out of 10 regular e-shoppers using social networks), yet slightly less than the European average. Almost half of them use it to find inspiration, to get information, and to buy directly.

# EXECUTIVE SUMMARY (2/2)

## 4. The perception of online purchase and delivery experiences is back on a positive track in 2023

- The downward trend of the last 2 years has reversed. Return, delivery and online purchase are perceived as easier as in the past, although without reaching the level of 2019 yet.
- Belgian regulars who found their last online purchase difficult mainly evoke issues related to payment process and hosting website/app.
- Regarding delivery, high effort perception is mainly linked to delay in the delivery or a delivery that happened at another moment or place than expected, or the lack of information about the parcel.
- In this context, knowing the delivery company remains very important to Belgian regulars to be reassured, but also to choose one they know and trust.
- 18% of Belgian regular e-buyers returned their last purchase. Although an upward trend towards the easiness of the process this year, the return process is still perceived as difficult by about 4 regulars out of 10, mainly because of the return process itself (having to go far away, having to repack the parcel, to print the return coupon, frustration to return a product bought...).
- In terms of delivery places, home delivery remains #1 delivery place used by Belgian regulars, followed by parcel shop delivery.

## 5. A stable situation as well among the online heavy buyers “The Aficionados”

- This specific group of e-shoppers still e-buy many products categories (almost 8) and received a high number of parcels in the last month (7.0 parcels), higher than the European average.
- They are as price sensitive as last year, at a similar level compared to Belgian regulars. But less of them are willing to pay a premium for green products, which could be a consequence of the high price increase observed over the last 18 months.
- Aficionados' perception of online purchase and delivery experience is less positive than the regulars: they tend to put more effort in delivery, return and their last purchase, compared to the regulars.
  - 56% of Aficionados claim their last delivery was easy
  - 58% claim their last online purchase was easy
  - 43% claim their parcel return was effortless

# METHODOLOGY

## Sample

18+ y.o. European e-shoppers who have ordered physical goods online since January and then, received at least one parcel, identified within a sample representative of the national population in age, gender, and SEC.

For the consolidated results at European level, a weight was applied to each country in order to reflect the right proportion of e-shoppers between the European countries.

## Key targets

- **Regular e-shoppers:**

E-shoppers aged 18 to 70 years old, who buy at least one product category every month online.

- **Aficionados:**

15% of the total e-shoppers with the highest number of annual online purchases.





# METHODOLOGY

## Data collection

- Online data collection (blind: interviewees do not know who requested the study)
- 24,233 interviews across 22 European countries (unweighted)
- Number of interviews per country (unweighted):

Austria:	1,005	Germany:	1,506	Portugal:	1,006
<b>Belgium:</b>	<b>1,003</b>	Hungary:	1,014	Romania:	1,015
Bulgaria:	1,014	Ireland:	1,003	Slovakia:	1,009
Croatia:	808	Italy:	1,504	Slovenia:	809
Czech		Latvia:	806	Spain:	1,502
Republic:	1,035	Lithuania:	804	Switzerland:	1,009
Estonia:	801	Netherlands:	1,007	UK:	1,502
France:	1,501	Poland:	1,570		

## Fieldwork

Fieldwork conducted from May 31st to July 19th, 2023





# LEGEND FOR EVOLUTIONS

## Significant differences

between 2023 and 2022 / 2021 scores are shown as follows  
(at 95% confidence rate)

when **positive**:

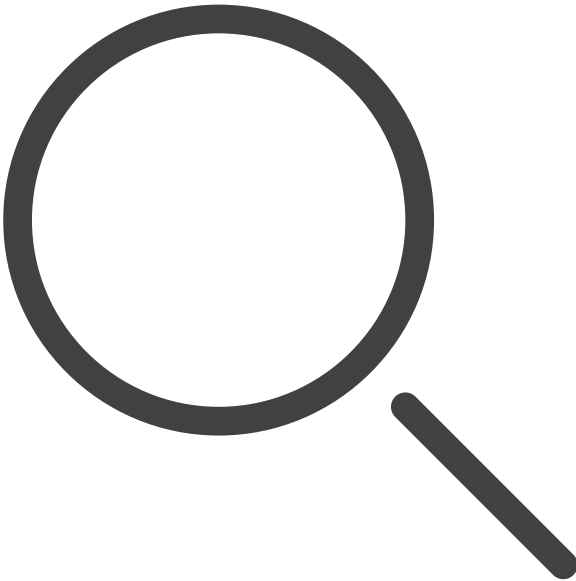
+XX ▲ vs 2022 | +XX ▲ vs 2021

when **negative**:

-XX ▼ vs 2022 | -XX ▼ vs 2021

with +/- xx the number of points difference vs. 2023.

No arrows if no significant difference.



# HOW IS E-COMMERCE EVOLVING IN THE CURRENT CONTEXT?

## THROUGH REGULAR E-SHOPPERS

1. How is e-commerce evolving in the current context?
2. To what extent has inflation impacted e-shopping?
3. What are the main trends of delivery?
4. Appendix





## HOW IS E-COMMERCE EVOLVING IN THE CURRENT CONTEXT?

- More e-shoppers but decreasing share of regulars and purchases made by them.
- Yet, regulars received more parcels than last year.
- A steady share of regular e-shoppers is using C2C platforms, although less of them are selling on those platforms and they buy less frequently on them.



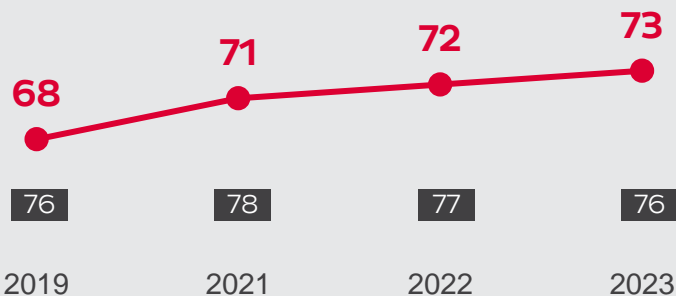
1.



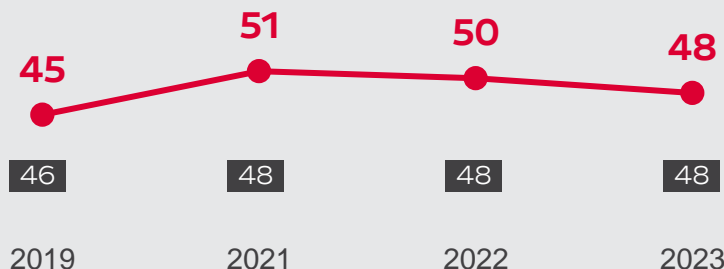
# E-COMMERCE KEY TRENDS IN SCORECARD

Despite an increase in the number of e-shoppers in Belgium, the share of regulars tends to decrease along with the share of their online shopping. Yet, regulars who still buy online in 2023 are heavier buyers.

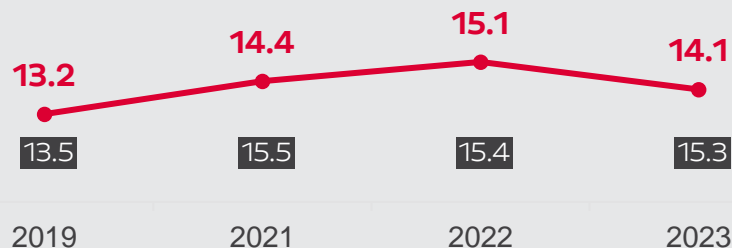
% - Share of e-shoppers among total population



% - Share of regular e-shoppers among total e-shoppers



% - Average share of online shopping for regular e-shoppers



Number of parcels received last month by regular e-shoppers



No significance test on this slide

XX

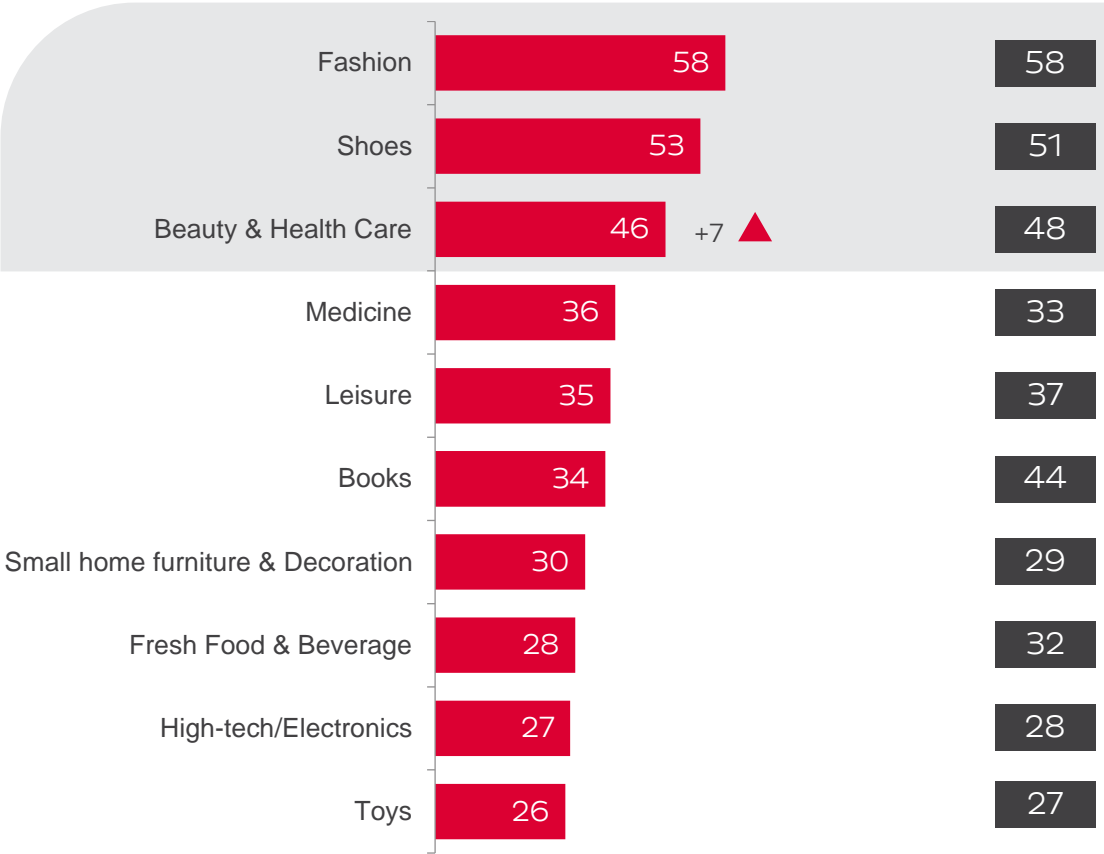
European  
average



# REGULAR E-SHOPPERS POPULAR CATEGORIES

As in 2022, they e-buy, on average, more than 5 different product categories. More regular e-shoppers are buying beauty & health care products online in 2023.

% - TOP 10 types of goods purchased online since January



5.5

5.9

categories bought on average

Biggest evolutions vs. 2022 (apart from top 10)

No other evolution

# REGULAR E-SHOPPERS' IMAGE OF E-SHOPPING

E-commerce is increasingly perceived as more convenient, stressless and time saving.



"Shopping online strongly reduces the stress of buying in stores" - %T2B

**63%** <sup>+7</sup> <sup>+7</sup> ▲

66%



"Shopping online is so convenient that I use it more and more, even if I must return my purchases sometimes" - %T2B

**65%** <sup>+9</sup> <sup>+7</sup> ▲

60%



"Shopping online allows me saves time" - %T2B

**74%** <sup>+8</sup> ▲

76%



"I can shop for nearly 100% of the products/services I need online" - %T2B

**47%**

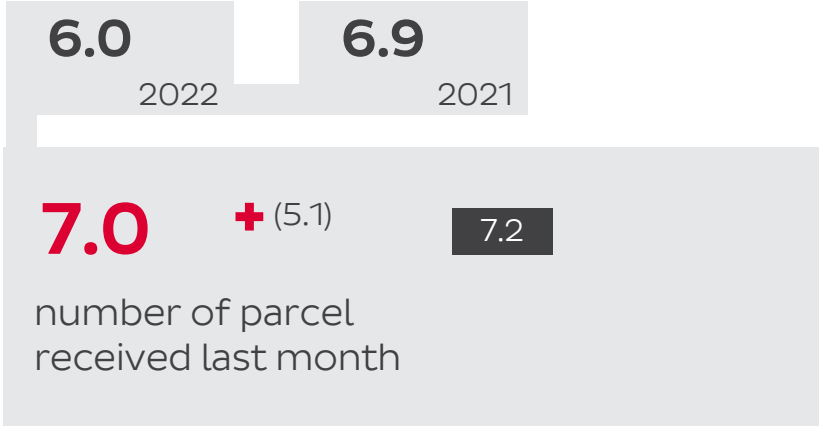
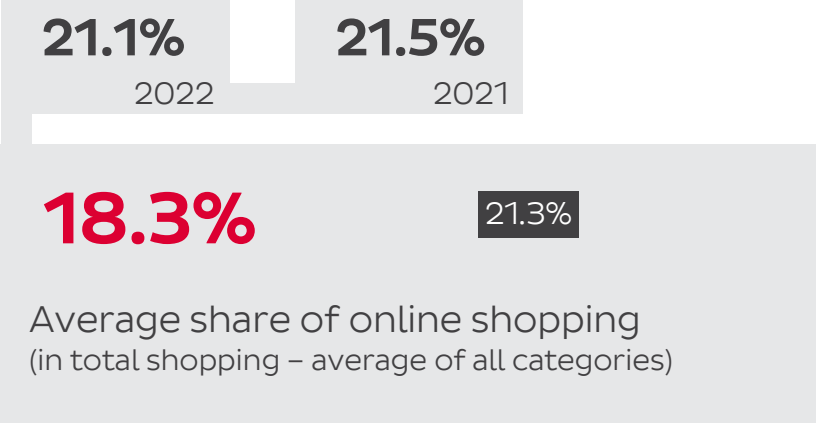
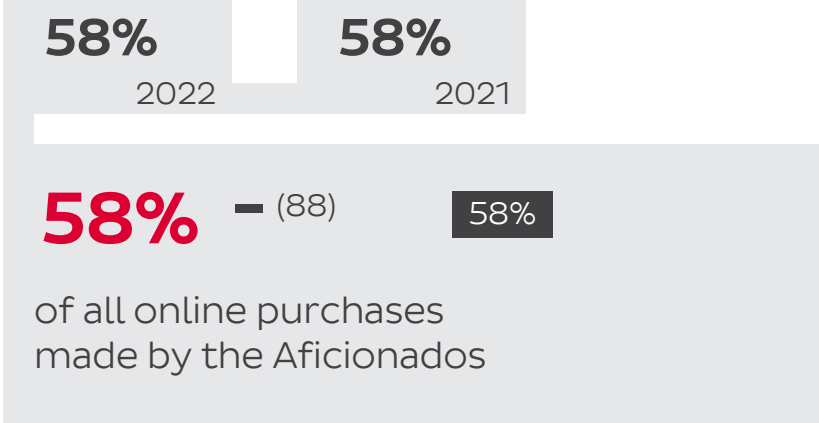
55%





# AFICIONADOS STILL DRIVE E-COMMERCE MOMENTUM

The share of online shopping of the Aficionados is also experiencing this downward trend, as the regulars. Aficionados tend to have more parcels delivered in 2023 vs. 2022, which means that they increased even more their offline purchases.



XX European average

+ – vs. regular e-shoppers (xx) at 95% confidence rate

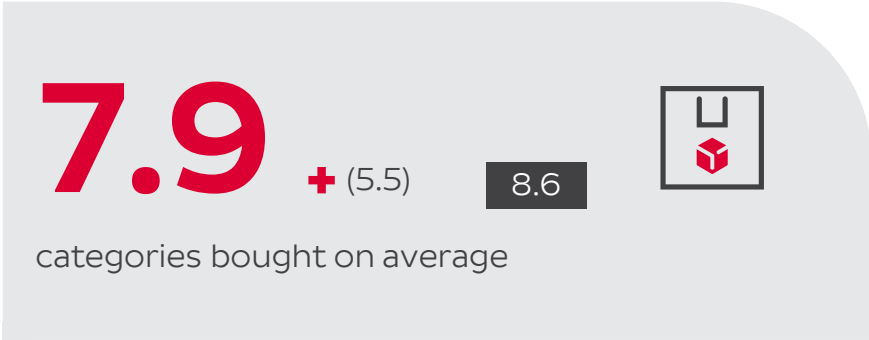
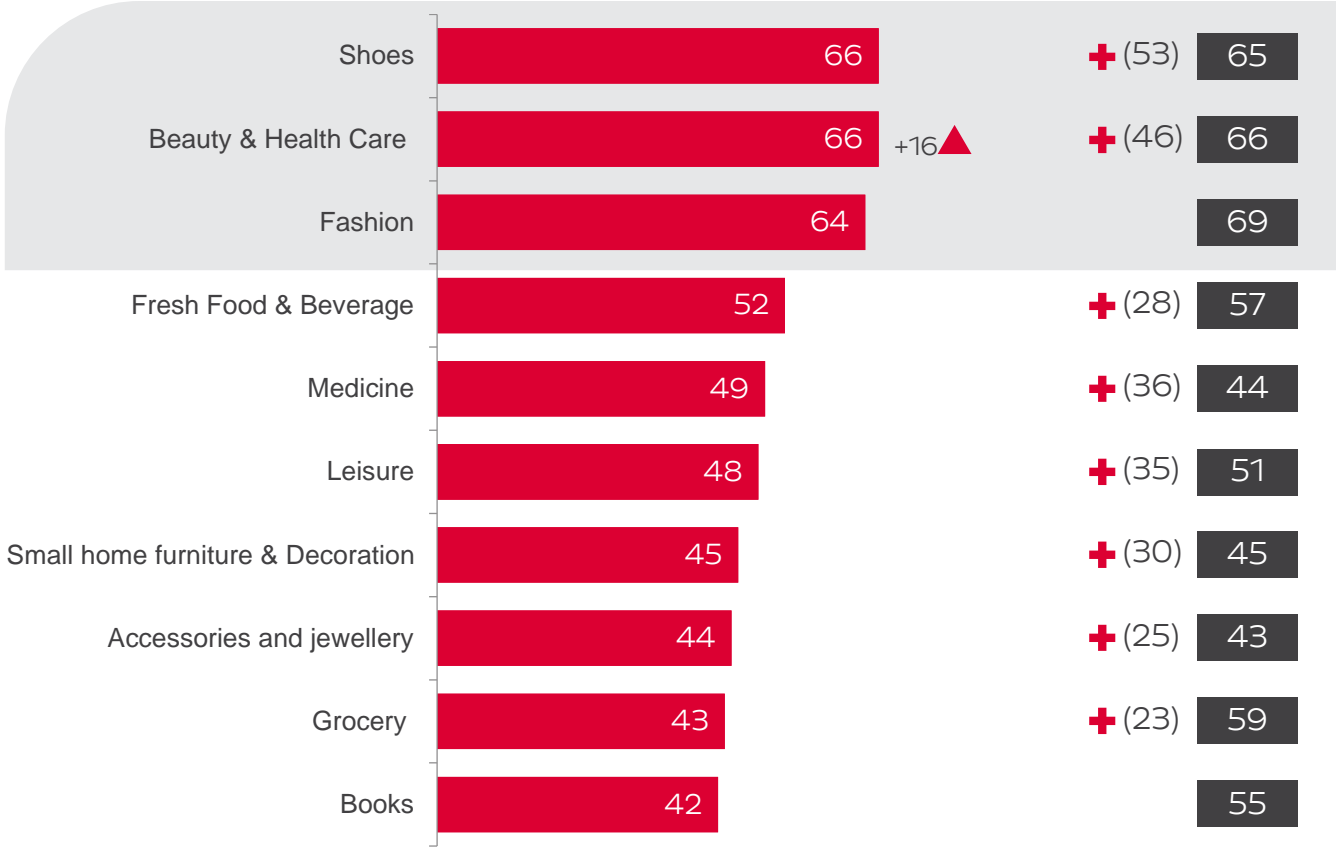


# AFICIONADOS POPULAR CATEGORIES



Aficionados bought the same number of product categories as in 2022, e-buying more Beauty & Health Care products this year. The Aficionados are heavier buyers of all products compared to the regulars, excepting Fashion and books.

## % - TOP 10 types of goods purchased online since January



Biggest evolutions vs. 2022 (apart from top 10)

No other evolution

+ — vs. regular e-shoppers (xx) at 95% confidence rate

SC2. Since January, what types of goods have you ordered online?

XX European average

# C2C PLATFORM USAGE & SOCIAL MEDIA SHOPPING

More than 7 in 10 Belgian regulars are using C2C platforms to buy or sell. Yet, less Belgian regulars are using C2C platforms to sell products, compared to 2022. And they are less frequent buyers than before.

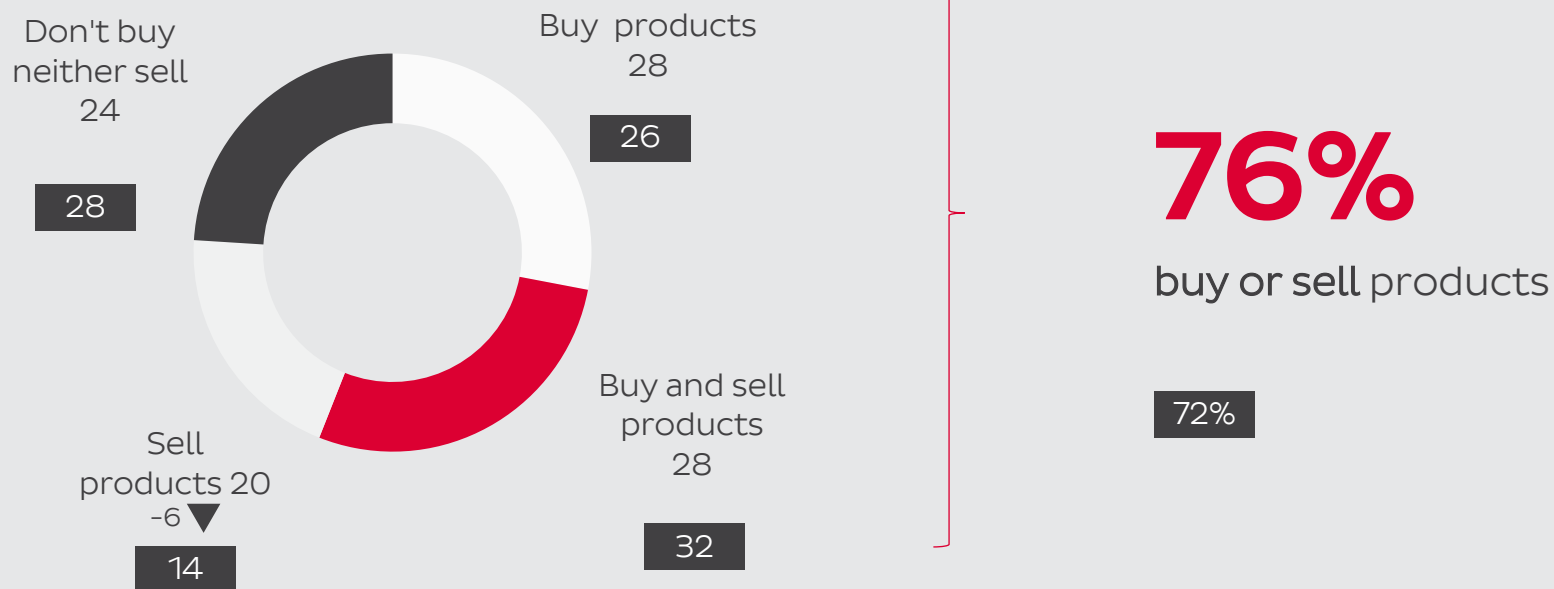




# ONLINE SHOPPING BETWEEN INDIVIDUALS

More than 7 out of 10 Belgian regulars are using C2C platforms to buy or sell. Less Belgian regulars are using C2C platforms to sell products, compared to 2022.

## % – Buying and selling on second-hand platforms



# C2C USERS PROFILE

Female

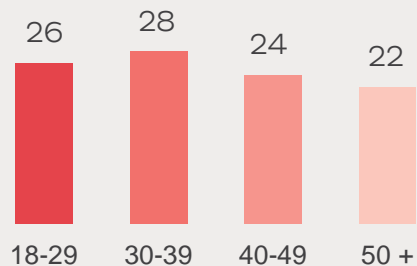
**54%** **56%**

Income

**71%** **52%**  
Lower

Age

**39.4 y.o.** **40.5**



Marital status

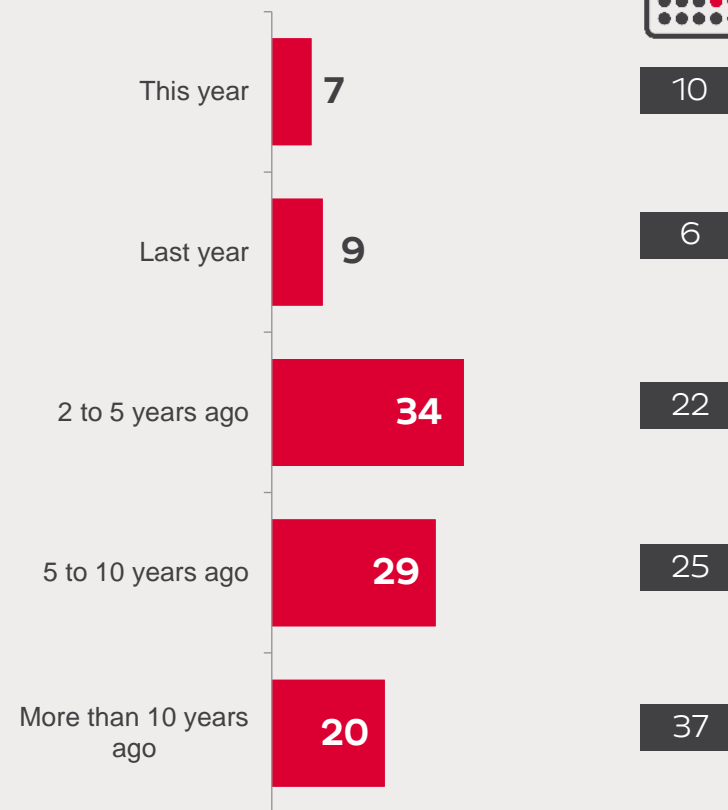
42%	Married	44%
27%	Single	31%
22%	Cohabitation	17%
6%	Divorced	6%

City size

**79%** **86%**

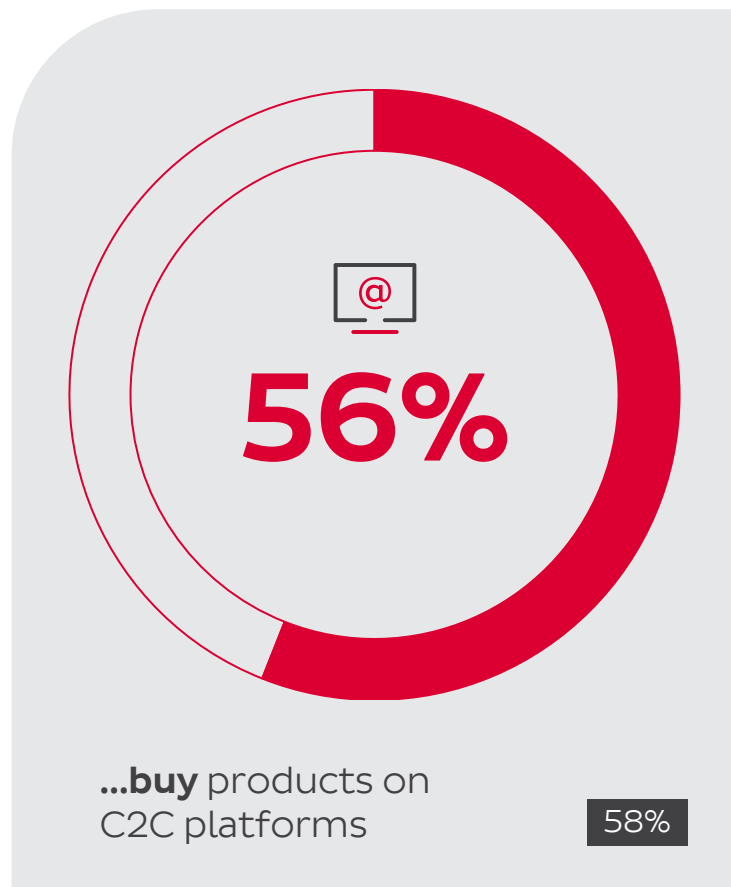


% - Started purchasing online ...



# BUYING PRODUCTS ON C2C PLATFORMS

C2C platform buyers represent more than half of the regulars. They buy less frequently than before, more of them buying less often than every 2 or 3 months.



## 32%

(% agree & strongly agree)

"I buy **more** second-hand products these days"

35%

### Frequency of purchase

(n=271)

**43%** at least once a month -10 ▼ 44%

**22%** once every 2 or 3 months 29%

**35%** less often +8 ▲ 27%



**11.4** times per year on average

12.1





# BUYING PRODUCTS ON C2C PLATFORMS

Saving money remains the #1 reason to purchase on C2C platforms. Supporting a more responsible economy comes after. The delivery they use is very diverse, no one really stands out.

## Reasons of purchase - %

(n=271)



## Choice of delivery

42%

Carrier proposed by the website

49%



41%

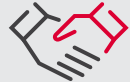
Carrier chosen by the seller



47%

39%

Hand delivery

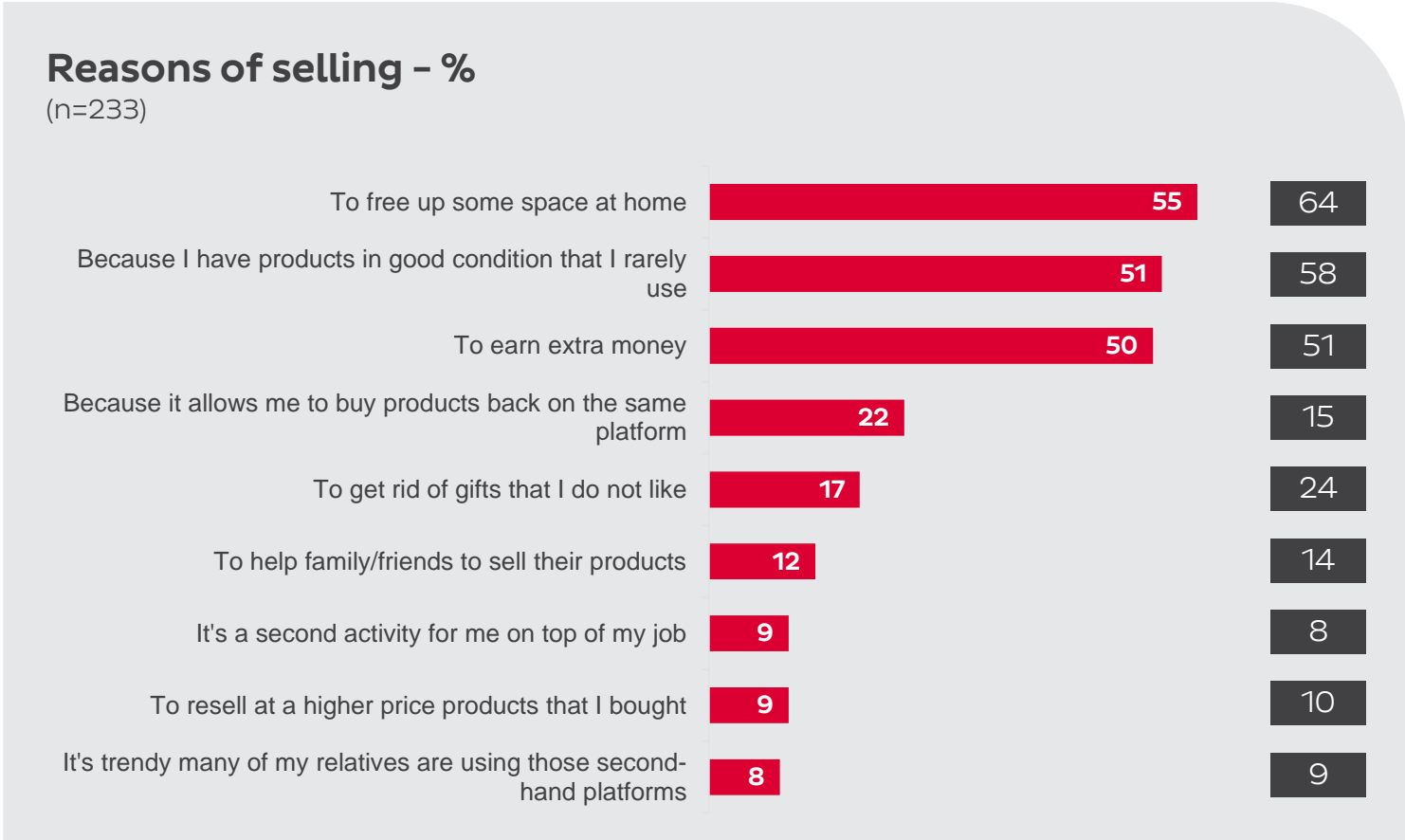
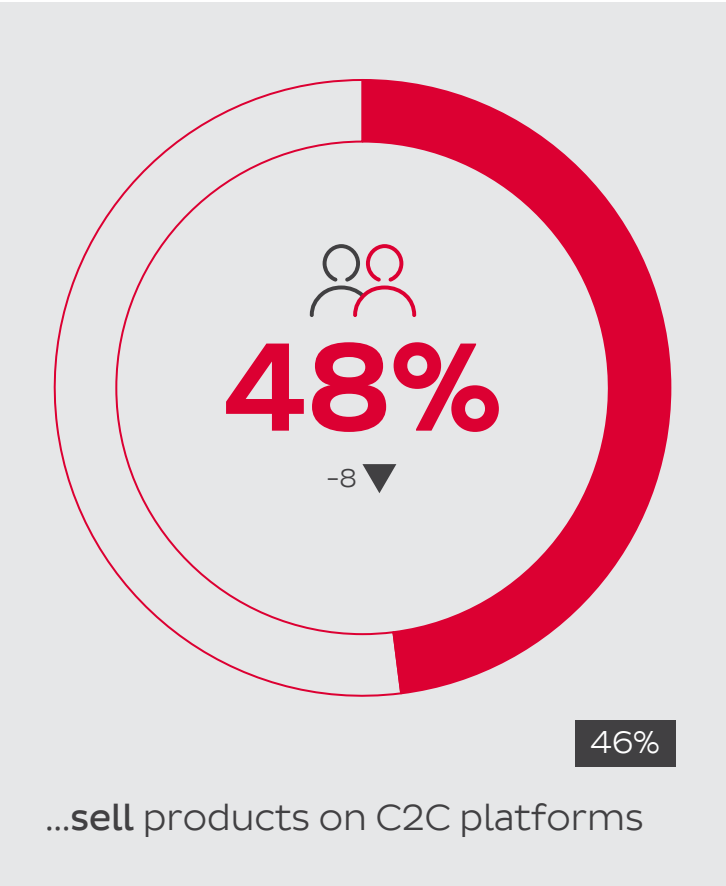


32%



# SELLING PRODUCTS ON C2C PLATFORMS

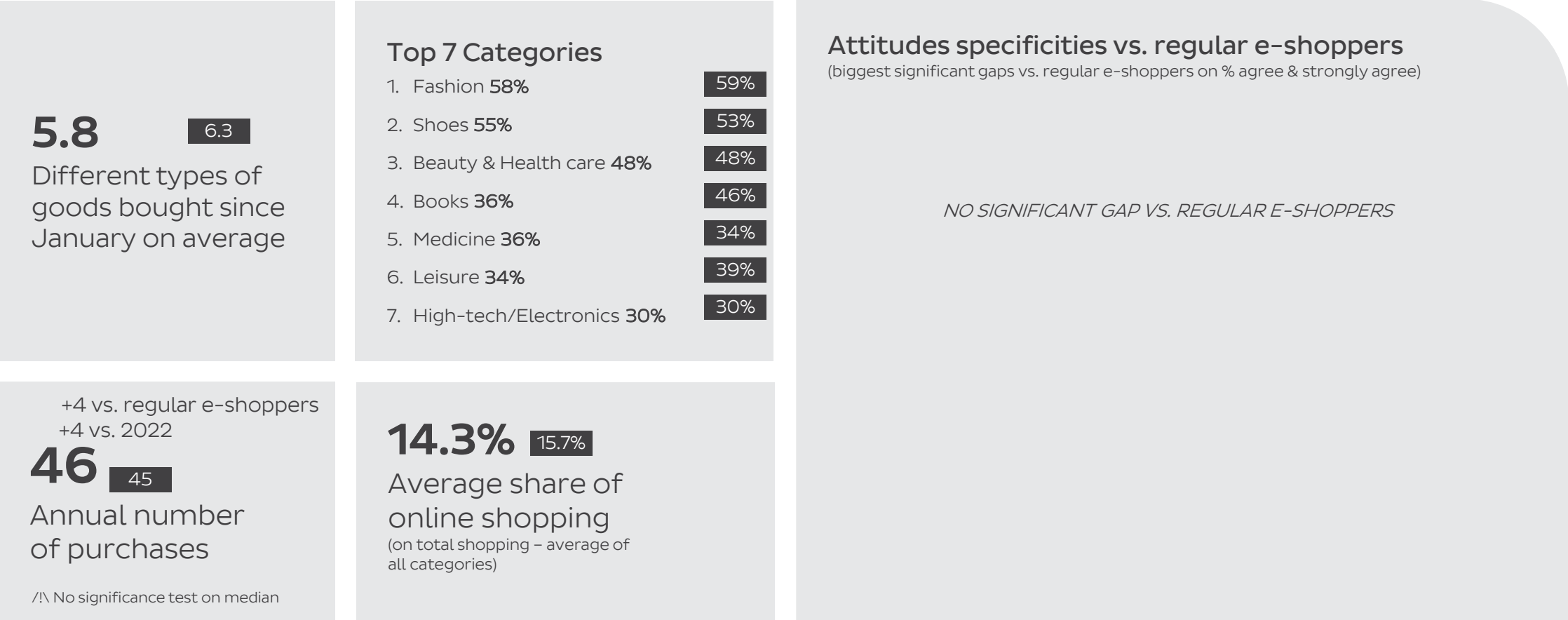
Less Belgian regulars sell on C2C platforms this year. Their main motivation remain the same though: first, to free up space; second, they have items in good condition that they want to get rid of, followed by earning extra money.





# ONLINE PURCHASE HABITS & ATTITUDES

C2C users profile is very close to the regulars' one, as they represent 7 out of 10 of the regulars.

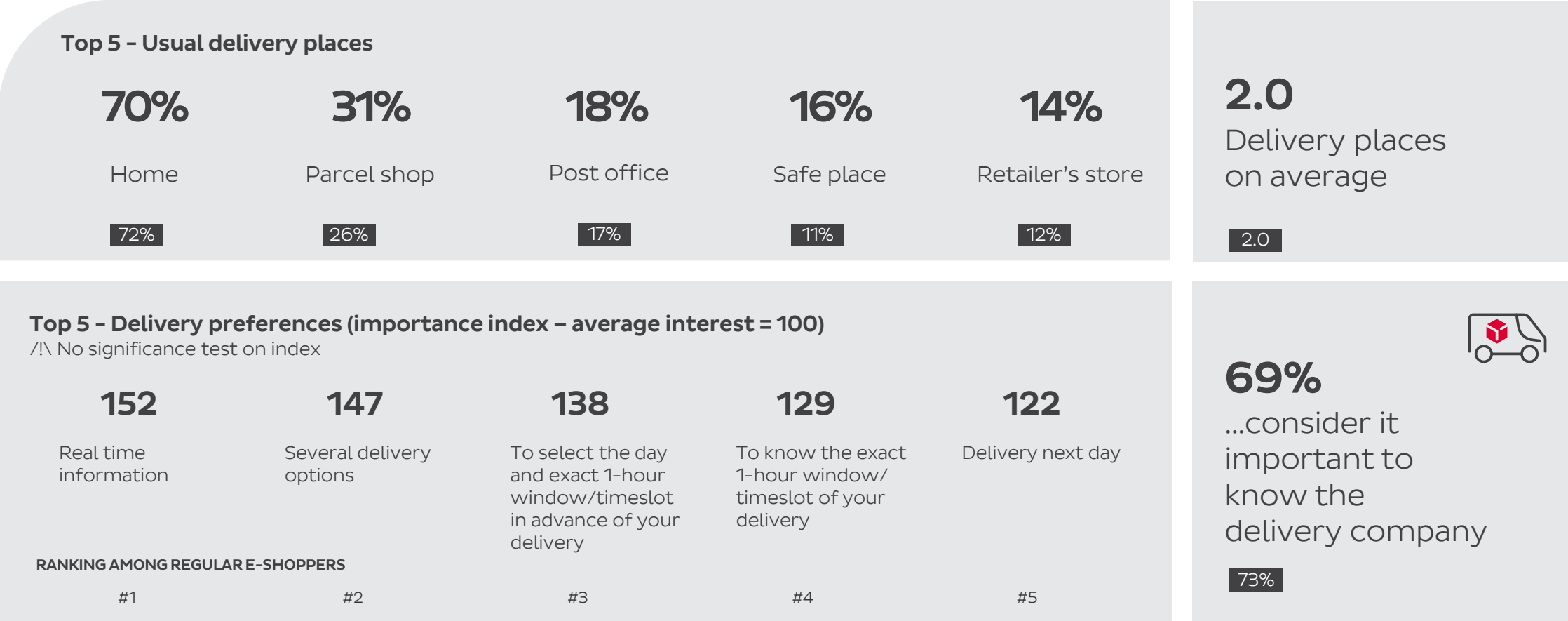






# DELIVERY PLACES & PREFERENCES

Delivery at home remains the first delivery place for C2C users, followed by parcel shop delivery. In terms of delivery services, it is important to them to receive real time information and to have several delivery options.



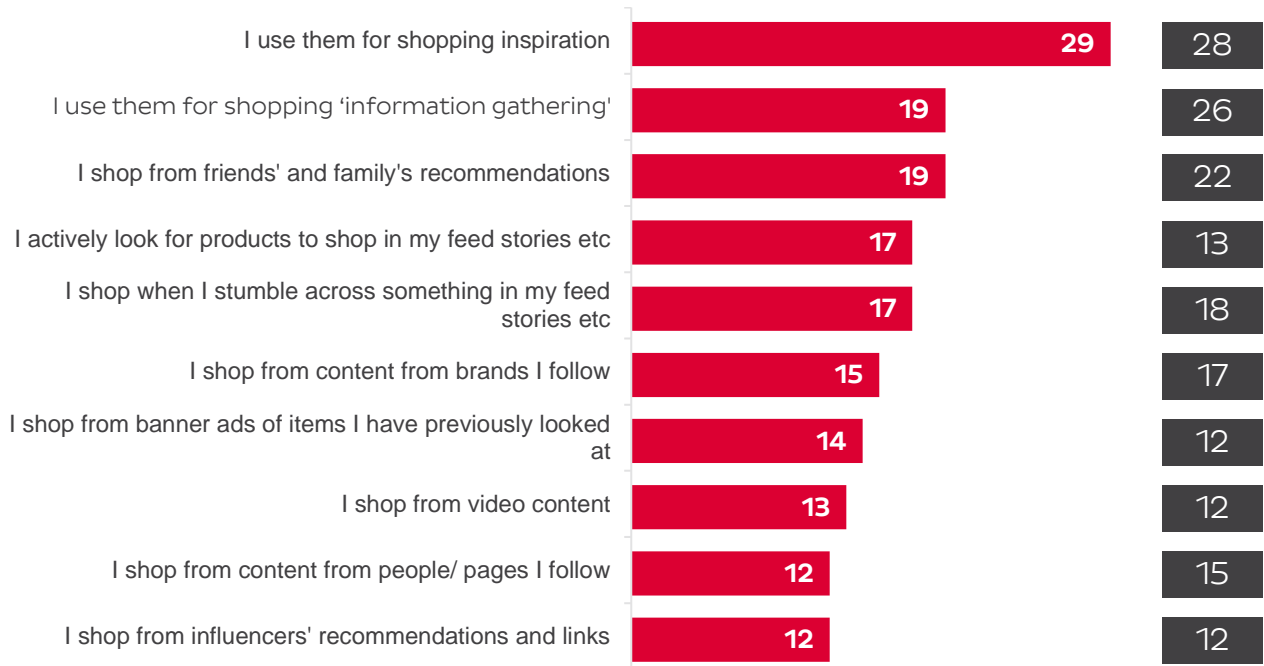


# SHOPPING THROUGH SOCIAL MEDIA (AMONG SOCIAL MEDIA USERS)

Shopping through social networking is a common practice of Belgian regulars. Their use are multiple, finding inspiration and information being the top ones.

## Shopping activities done on social networks -%

(Among social media users, n=459)



67%


of social media users use them for at least one shopping purpose

70%

46%

...shop directly from social media

48%



1.7

Activities on average

1.8



## TO WHAT EXTENT HAS INFLATION IMPACTED E-SHOPPERS?

- Regular e-shoppers' price sensitivity is increasing in 2023
- Free delivery is an increasing driver for online shopping
- The Aficionados are as price sensitive as before, yet a lower willingness to pay a price premium for green products



# 2.

# ATTITUDE TOWARDS PRICE

Belgian regulars are even more price sensitive than before, price being the most important factor in their purchasing decisions for almost 2 / 3 of them.

## 59%



65%

of regular e-shoppers consider that shopping online saves money - %T2B

## 64%

+8 ▲



62%

"Price is the most important factor in my purchasing decisions" - %T2B

## 66%



69%

"I am always on the lookout for a really good deal" - %T2B

## 54%



53%

"I look forward to big discount events, online or offline, (Black Friday, seasonal sales...)" - %T2B

## 32%

34%

"I'm ready to pay a price premium for services that make my life easier" - %T2B

## 33%

39%

"I'm willing to pay a premium for products/services that are respectful of the environment" - %T2B

XX

European average

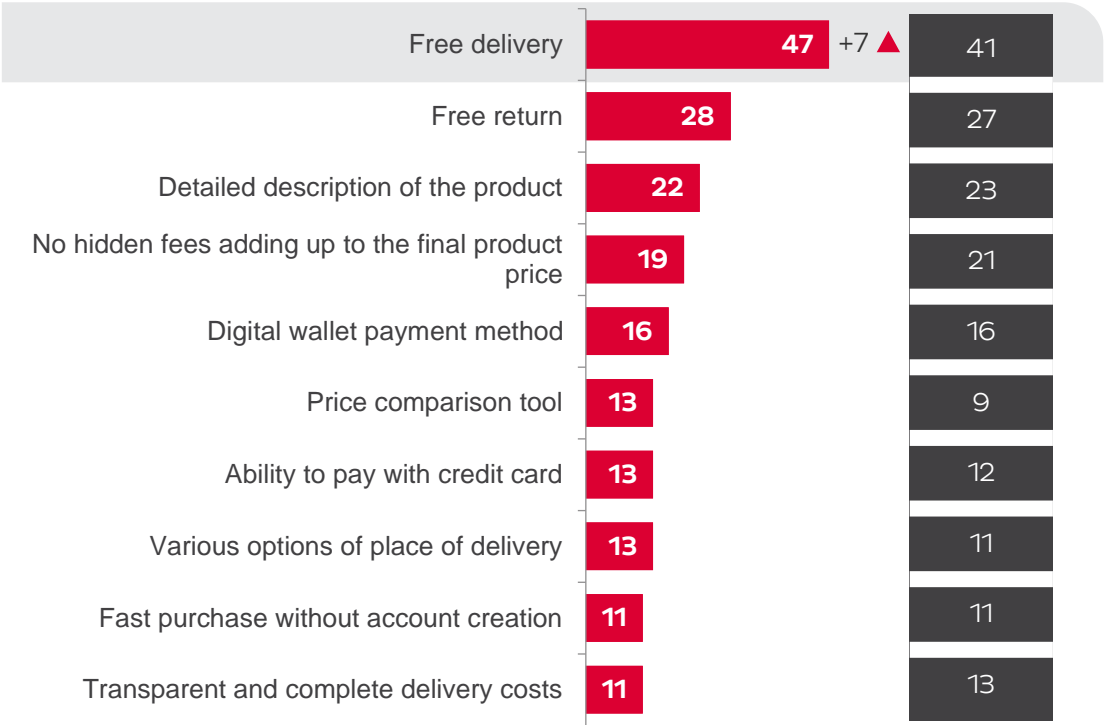


# ONLINE PURCHASE DRIVERS

Among drivers of online purchase, price-related criteria are the top drivers for Belgian regulars. Free delivery matters even more than before.

## Top 10 important criteria when buying online % - (out of 25 criteria)

Items ranked as 1st, 2nd or 3rd most important



**Biggest evolutions vs. 2022** (apart from TOP10)

4% Presence of the live chat support to provide real time answers (before during or after purchase) -5 ▼



# DISSUASIVE EFFECTS

Bad opinion of fellow shoppers now becomes the 1<sup>st</sup> barrier that would prevent Belgian regular e-shoppers from buying online.

## Top 10 features that prevent the most from buying online % – (out of 16 criteria)

Items ranked as 1st, 2nd or 3rd most important



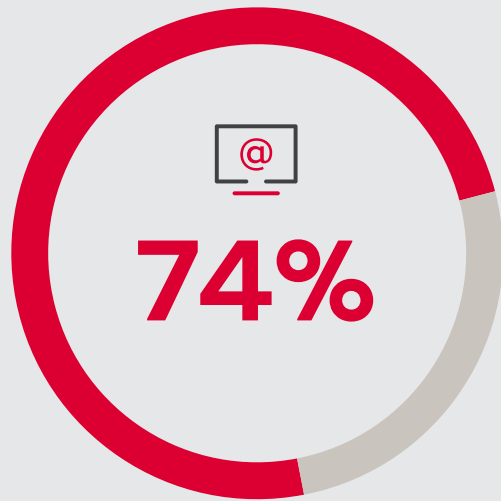
**Biggest evolutions vs. 2022** (apart from TOP10)

3% Lack of environmentally friendly delivery options -4 ▼



# FOREIGN VS. LOCAL

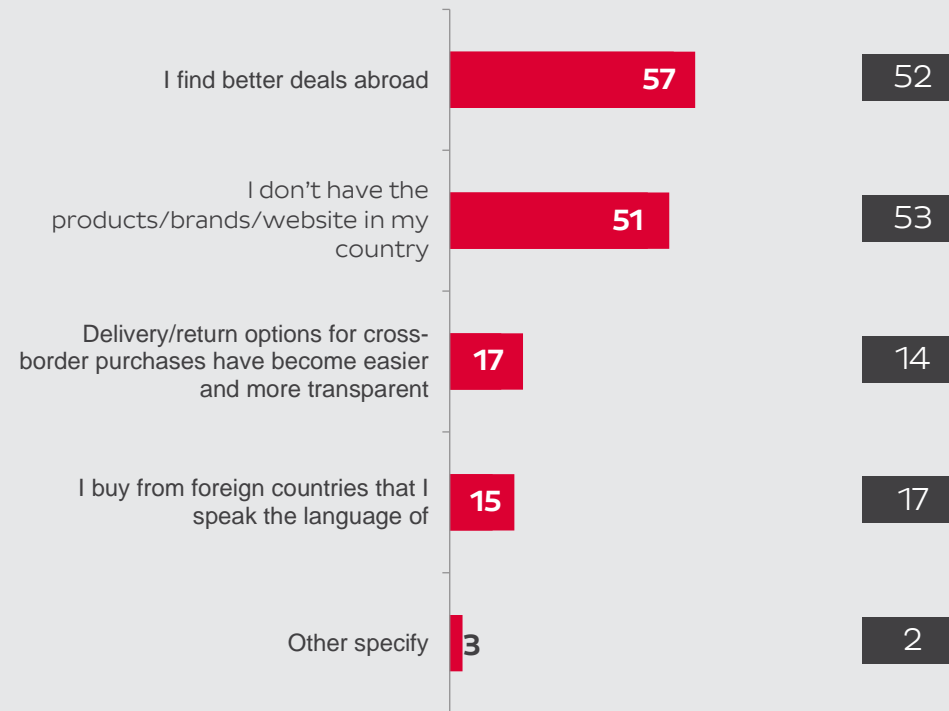
More than 7 out of 10 Belgian regular are buying on foreign websites; price is a key driver for doing so.



of regular e-shoppers have already **bought online from foreign websites**

58%

## Reasons to make purchases from foreign websites % (n=359)



C6 – Have you ever bought online from foreign websites? Rq: We define a foreign website as a website having a different domain name than your local one and/or a website being in a foreign language.  
 C8 – What were the reasons for you to make purchases from foreign websites?  
 Base: People that have already bought online from foreign websites  
 Rq: Several answers allowed

XX

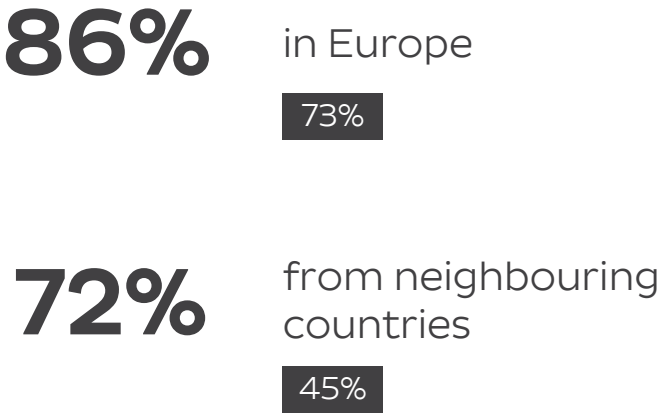
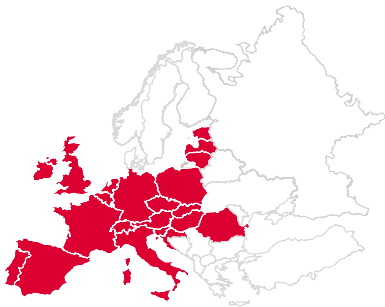
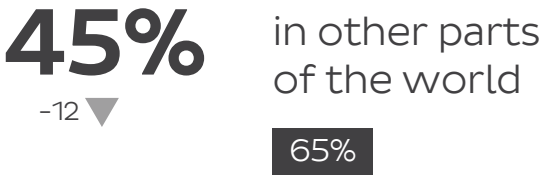
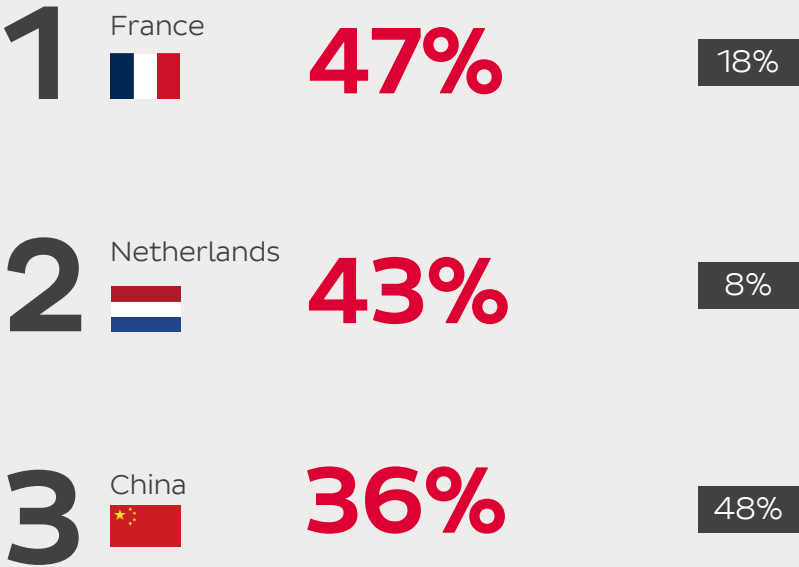
European average



# PURCHASES FROM FOREIGN COUNTRIES

Belgian regulars first buy on websites from France and the Netherlands, their neighbouring countries, but also from China, which is now in the Top 3.

Top 3 most common foreign countries for buying online



C7 – From which countries? Base: People that have already bought online from foreign websites (n=359)  
Rq: We define a foreign website as a website having a different domain name than your local one and/or a website being in a foreign language.



## ZOOM ON THE PRICE SENSITIVE E-BUYERS

Price sensitive e-buyer has been defined as a regular e-shopper which showed price sensitivity by making price the most important factor when purchasing.

- %TB “Price is the most important factor in my purchasing decisions”

N=99 (weighted)

# REGULAR PRICE SENSITIVE E-BUYERS PROFILE

## Female

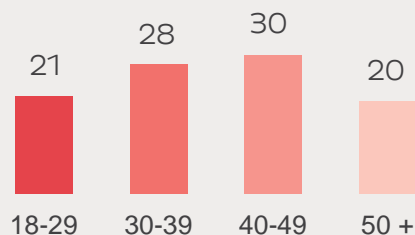
**64%** **61%**

## Income

**73%** **60%**  
Lower

## Age

**40.3 y.o** **41.1**



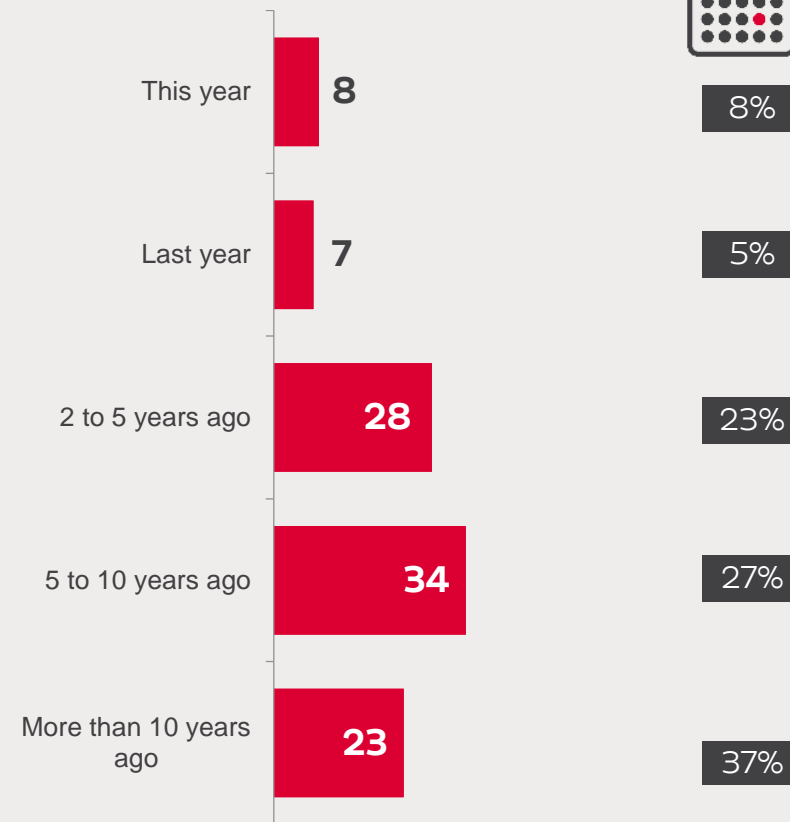
## Marital status

23%	Single	33%
42%	Married	42%
24%	Cohabitation	15%
9%	Divorced	7%

## City size

**81%** **85%**  
Urban

## % - Started purchasing online ...





# ONLINE PURCHASE HABITS & ATTITUDES

Unsurprisingly, discounts and good deals are more important to price sensitive e-buyers. They are also more likely to find online shopping more convenient than the regulars.

6.0 5.9

Different types of goods bought since January on average

### Top 7 Categories

- 1. Fashion 65% 59%
- 2. Shoes 53% 51%
- 3. Beauty & Health care 50% 50%
- 4. Medicine 40% 32%
- 5. Leisure 36% 36%
- 6. Accessories and jewellery 34% 27%
- 7. Small home furniture & Decoration 33% 30%

### Attitudes specificities vs. regular e-shoppers

(biggest significant gaps vs. regular e-shoppers on % agree & strongly agree)

#### Positive +

- 85% Shopping online allows me to save time (74) 86%
- 85% I am always on the lookout for a really good deal (66) 86%
- 83% Shopping online strongly reduces the stress of buying in stores (63) 74%
- 79% Shopping online is so convenient that I use it more and more, even if I must return my purchases sometimes (65) 70%
- 76% Shopping online saves money (59) 75%
- 73% The online offer is as wide as what offline retailers offer (62) 63%
- 69% I look forward to big discount events, online or offline, (Black Friday, seasonal sales...) (54) 67%
- 68% I actively look for reviews and ask for recommendations online before making a purchase (55) 66%
- 61% I can shop for nearly 100% of the products/services I need online (47) 64%

flat vs. regular e-shoppers  
-6 vs. 2022

42 39

Annual number of purchases

14.7% 15.3%

Average share of online shopping

(on total shopping – average of all categories)

/!\ No significance test on median

XX

European average

+ vs. regular e-shoppers (xx) at 95% confidence rate  
Significance test vs. 2022 only

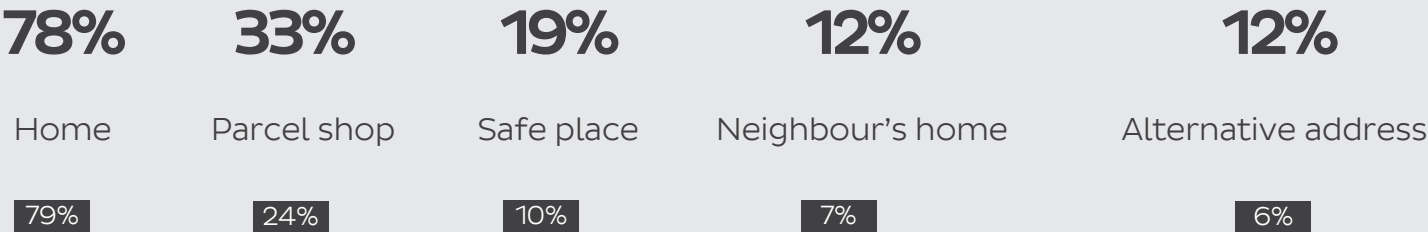




# DELIVERY PLACES & PREFERENCES

Delivery at home is the first delivery place for price-sensitive e-buyers as well. Having real time information on delivery matters for them a lot.

## Top 5 - Usual delivery places

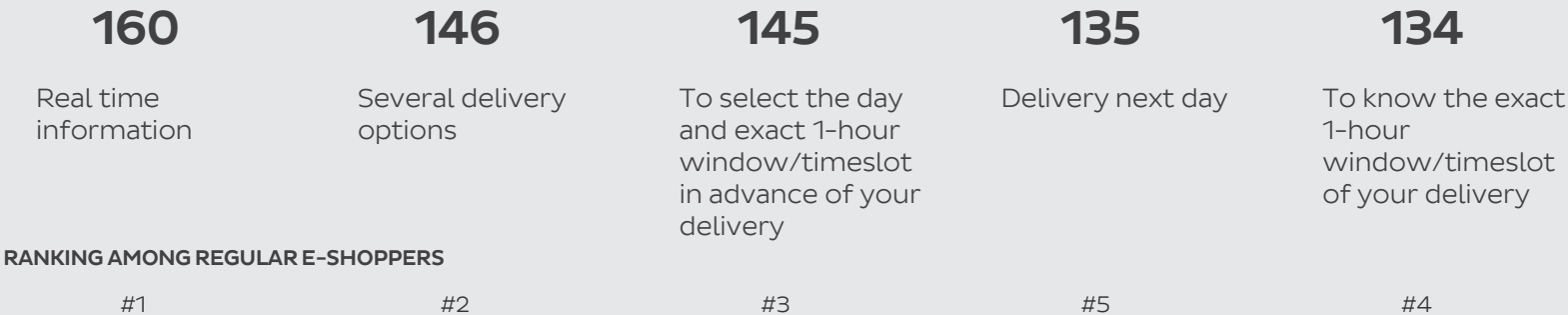


1.9  
Delivery places  
on average

1.9

## Top 5 - Delivery preferences (importance index – average interest = 100)

/!\ No significance test on index



64%  
...consider it  
important to  
know the  
delivery company

69%

XX European  
average

+ — vs. regular e-shoppers (xx) at 95% confidence rate  
Significance test vs. 2022 only





# ZOOM ON THE AFICIONADOS

The Aficionados are as much price sensitive as they were in 2022, but now less are willing to pay an extra for green products.

# ATTITUDE TOWARDS PRICE



The Aficionados are as much price sensitive as they were in 2022. Inflation could have impacted the Aficionados' willingness to pay an extra for green products though.

**68%**

74%

"I am always on the lookout for a really good deal" – %T2B

**65%**

61%

"Price is the most important factor in my purchasing decisions" – %T2B

**63%**

61%

"I look forward to big discount events, online or offline, (Black Friday, seasonal sales...)" – %T2B

**61%**

70%

of Aficionados consider that shopping online saves money – %T2B

**43%**

45%

"I'm ready to pay a price premium for services that make my life easier" – %T2B

**37%**

-12▼

48%

"I'm willing to pay a premium for products/services that are respectful of the environment" – %T2B

XX European average

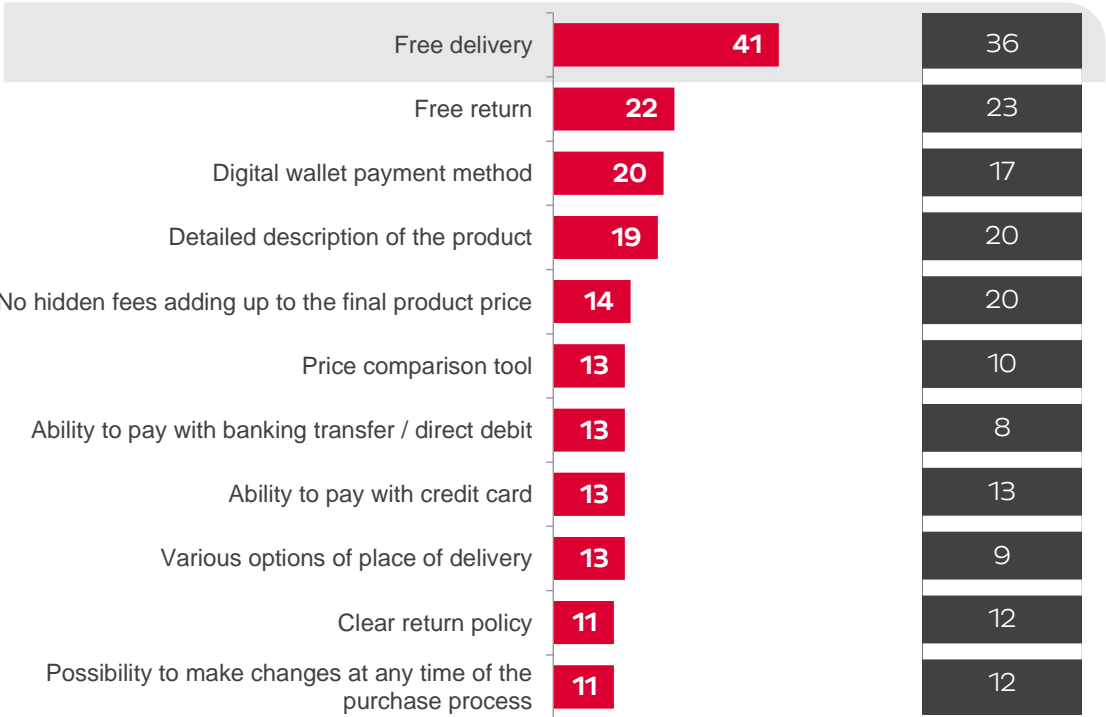
# ONLINE PURCHASE DRIVERS



Among Aficionados’ drivers of online purchase, the weight of price-related criteria remains stable as well. The presence of the live chat support is less important to them, as to regular e-shoppers.

## Top 10 important criteria when buying online % – (out of 25 criteria)

Items ranked as 1st, 2nd or 3rd most important



### Biggest evolutions vs. 2022 (apart from TOP10)

6% Presence of the live chat support to provide real time answers (before during or after purchase) -7 ▼

XX European average

# DISSUASIVE EFFECTS



Bad opinion of fellow shoppers on social media remains the 1<sup>st</sup> barrier that would prevent Aficionados from buying online. Technical bugs on the website/app are an emerging barrier, as well as not knowing when they will get their parcel. .

## Top 10 features that prevent the most from buying online % – (out of 16 criteria)

Items ranked as 1st, 2nd or 3rd most important



**Biggest evolutions vs. 2022** (apart from TOP10)

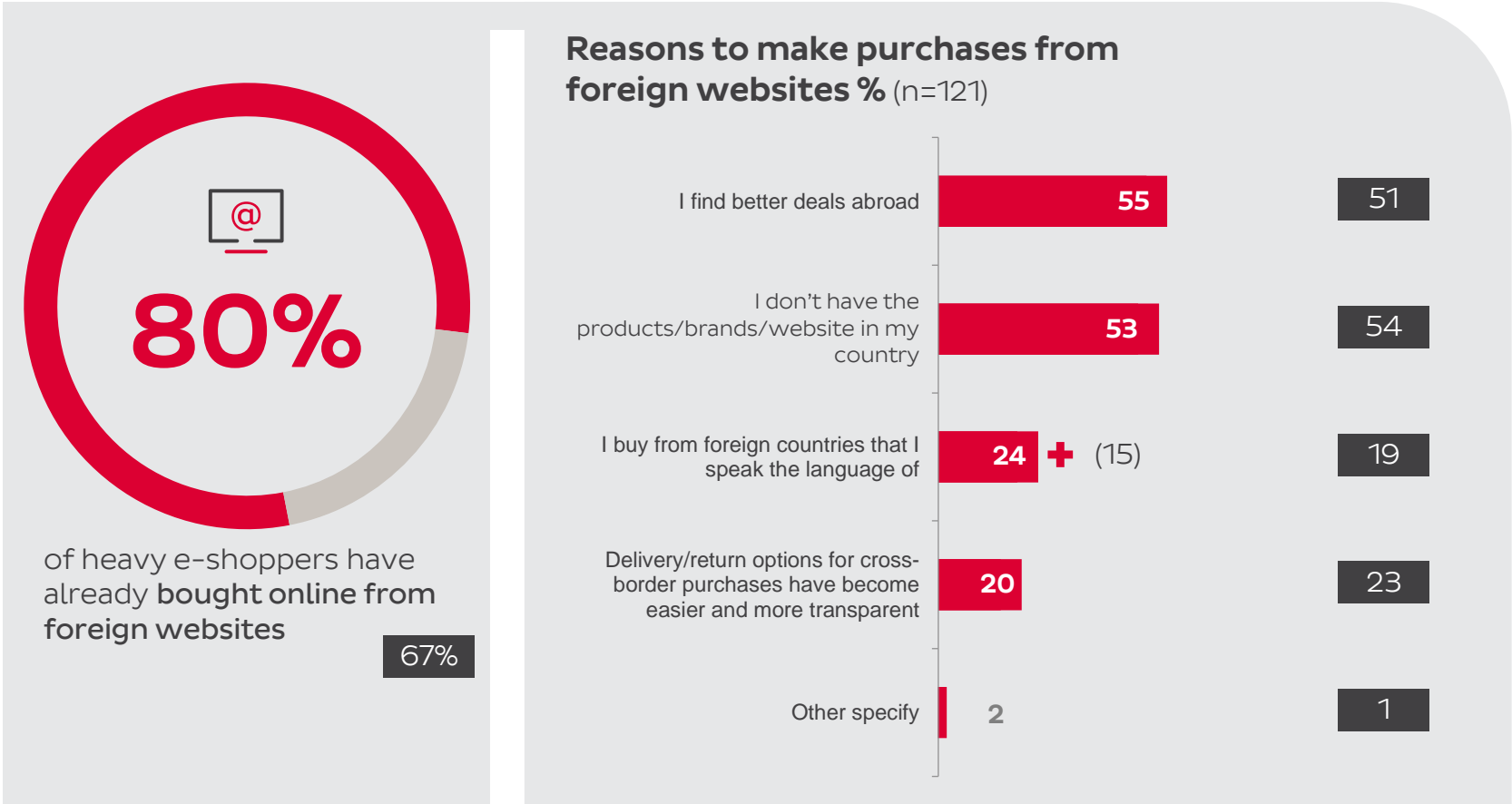
*No other evolution*

+ — vs. regular e-shoppers (xx) at 95% confidence rate

# FOREIGN VS. LOCAL



Like regular e-shoppers, most Aficionados buy from foreign websites to find better deals or products not available in their country. Compared to the regulars, more of them buy from foreign countries that they speak the language of.



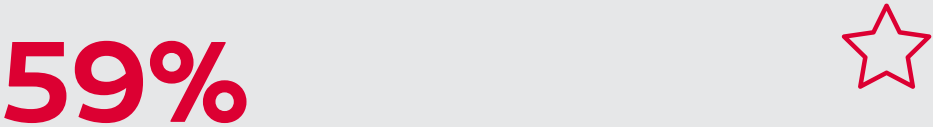
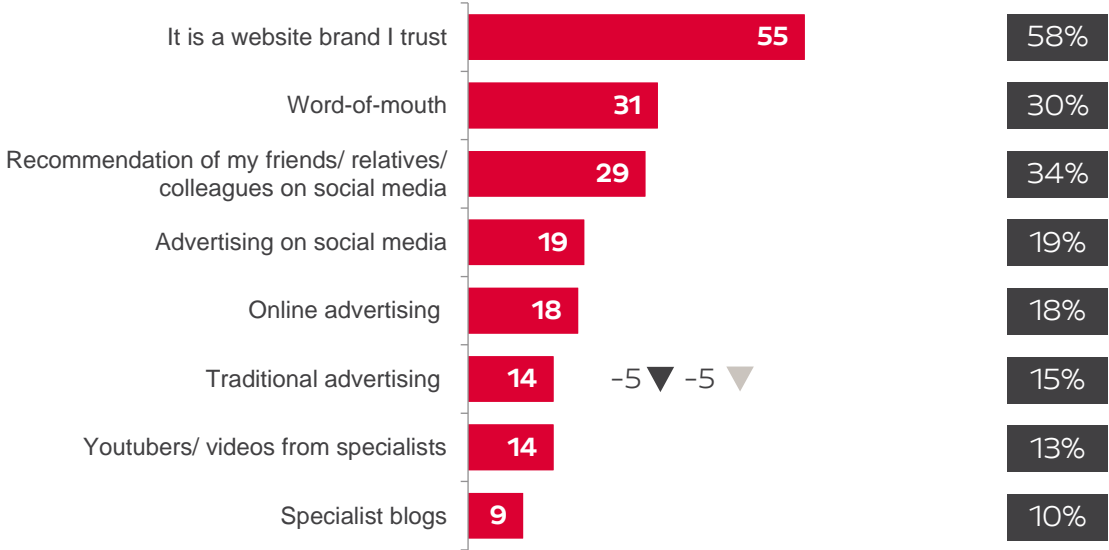
C6 – Have you ever bought online from foreign websites? Rq: We define a foreign website as a website having a different domain name than your local one and/or a website being in a foreign language.  
C8 – What were the reasons for you to make purchases from foreign websites?  
Base: People that have already bought online from foreign websites  
Rq: Several answers allowed



# REVIEWS AND RECOMMENDATIONS

Regular e-shoppers still first choose the websites they trust. They are less and less influenced by traditional advertising when they e-buying.

## Drivers when choosing a website/ an app-%



Share or publish a feedback after purchasing

67%



NET Social Media and influencers

55%

1.9

2.0

Average number of influencers

C18 – When shopping online, how do you choose a website and/or an app?  
Rq: Several answers allowed  
C19 – Do you publish or give feedback, after purchasing?





## WHAT ARE THE MAIN TRENDS OF DELIVERY?

- Belgian regular e-shoppers are 1<sup>st</sup> delivered at home, followed by parcel shop deliveries. Less than half of them use OOH delivery.
- Regular e-shoppers put less effort into delivery, return and purchase this year, and their overall satisfaction remains high.
- To note, they are less this year to return their parcels.



# 3.

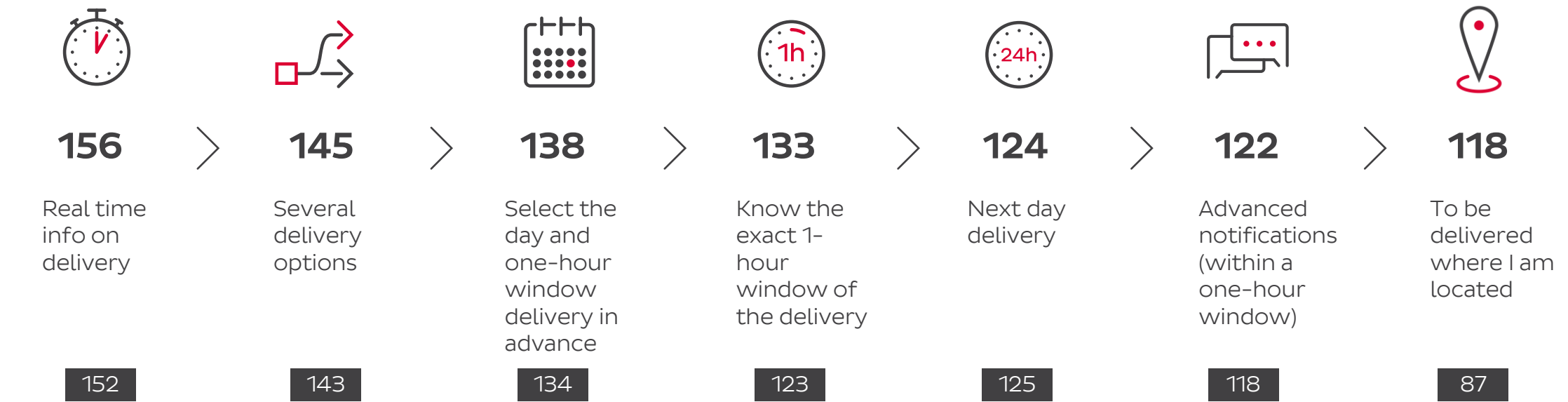




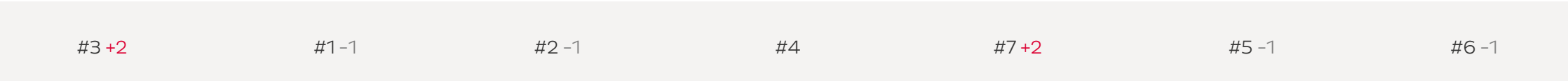
# TOP DELIVERY PREFERENCES

Being informed on delivery in real time is becoming more important in 2023, being now the top expectation of Belgian regular e-shoppers, as their European peers. Next day delivery is also going up in the ranking.

**Delivery preferences** (importance index – average interest = 100)



## RANKING IN 2022

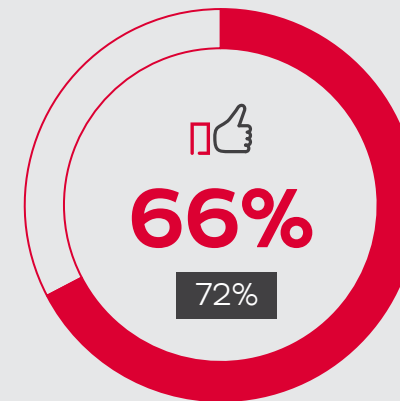
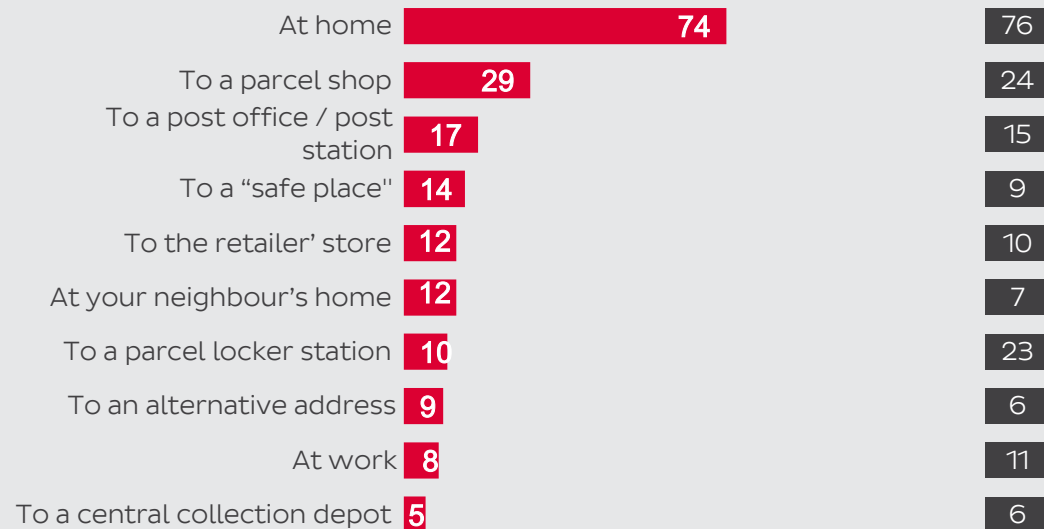


C16new – What delivery options are important to you when choosing an online retailer?  
Please select one option that is THE MOST IMPORTANT, and another one that is the LEAST IMPORTANT to you.  
Rq: Maxdiff module – the items are displayed 4 at a time on 8 different screens, each time the respondent selects the most and least important

# DELIVERY PREFERENCES

Belgian regular e-shoppers first delivery place is at home, followed by parcel shop delivery; 50% are using several delivery places. Their use of safe place as a delivery place is growing. Less than half of Belgian regulars are being delivered out of home.

## Usual delivery places-%



... found delivery easy/effortless

**1.9** Delivery places on average

**51%** 51%

Usually use more than one delivery place

**42%** 44%

Are delivered out of home (parcel locker, parcel shop or retailer store)

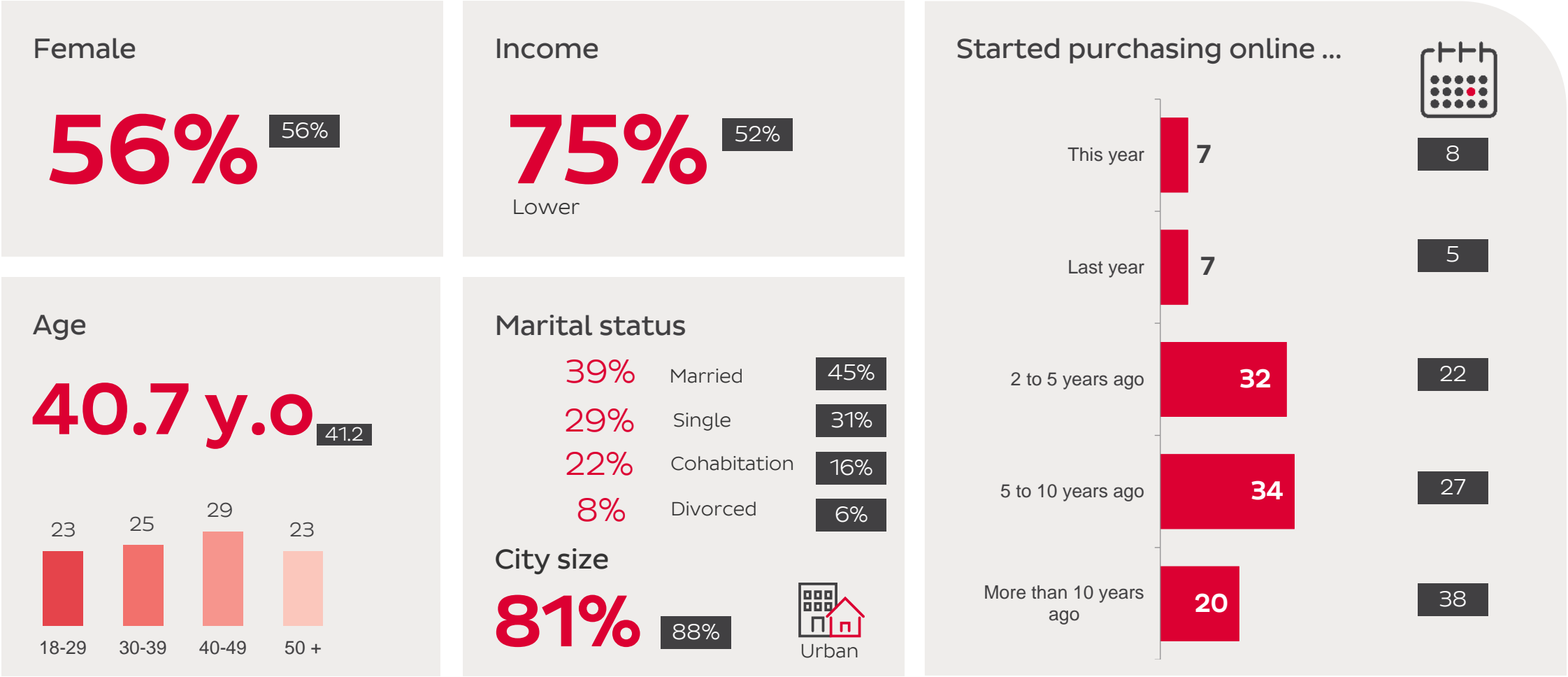
D14. How much effort did you have to put into the delivery (e.g. tracking, picking up, receiving, etc...) of your last online purchase?

C14. Where do you usually have your parcels delivered to?

XX European average



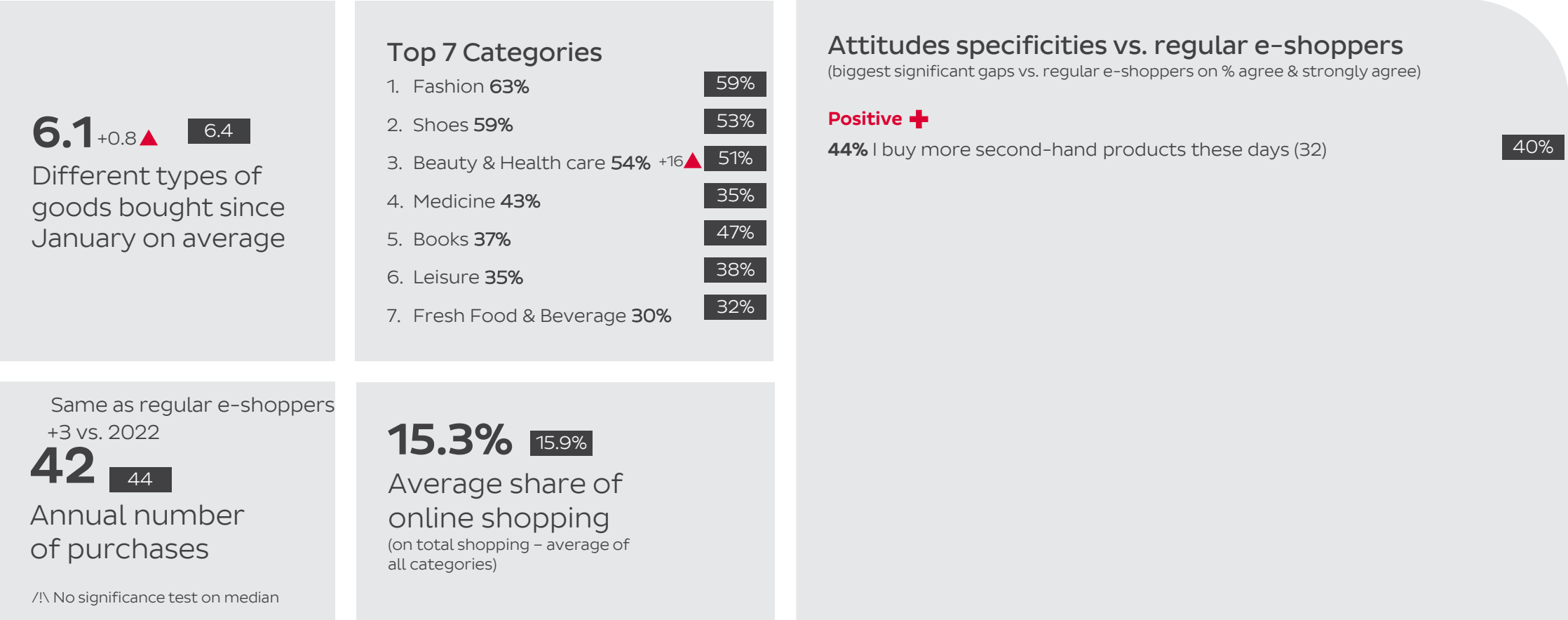
# OUT OF HOME USERS PROFILE





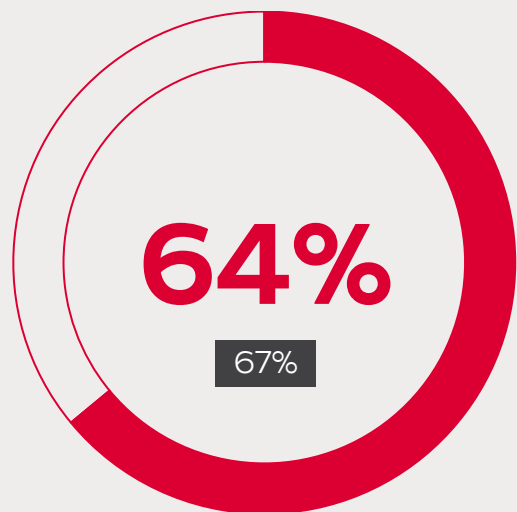
# ONLINE PURCHASE HABITS & ATTITUDES

In trend, OOH users buy more product categories than the regular e-buyers overall, and even more than in 2022.

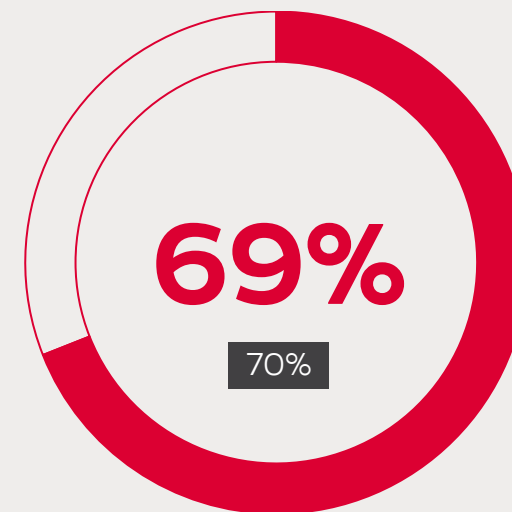


# IMPORTANCE OF DELIVERY SERVICES

Being informed about the exact 1-hour delivery timeslot and being able to choose the specific day/time of delivery remains important to most regular e-shoppers.



Consider that **knowing the exact 1-hour window/timeslot of their delivery** would make them more likely to purchase from a website/retailer/app  
(% agree & strongly agree)



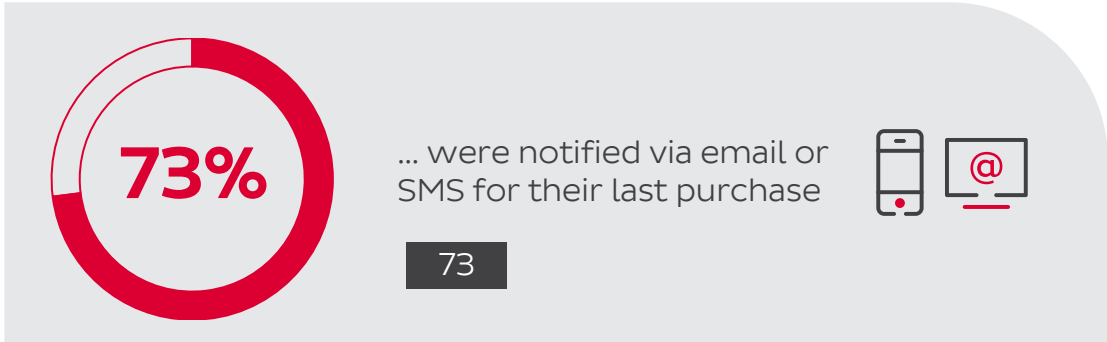
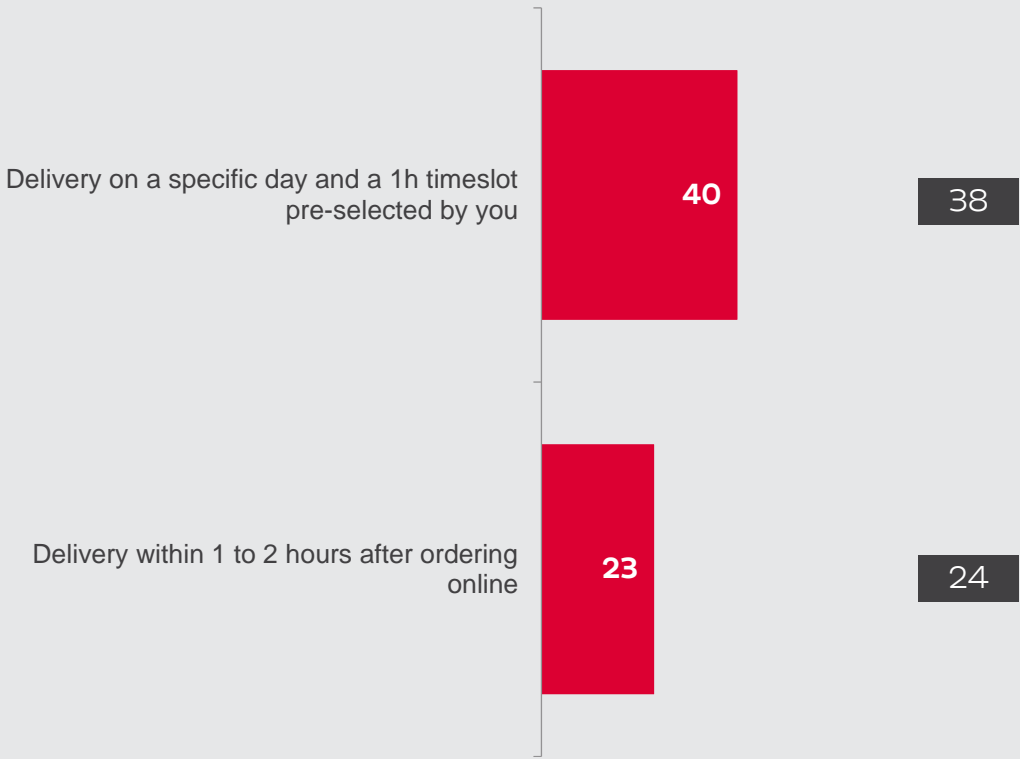
Consider that the ability to **select the day and exact 1-hour window/timeslot in advance of their delivery** would make them more likely to purchase from a website/retailer/app  
(% agree & strongly agree)



# USE OF DELIVERY SERVICES

The use of delivery services is stable in the last few years. 7 out of 10 Belgian regulars were notified via email or SMS for their last delivery.

## Delivery services already used-%

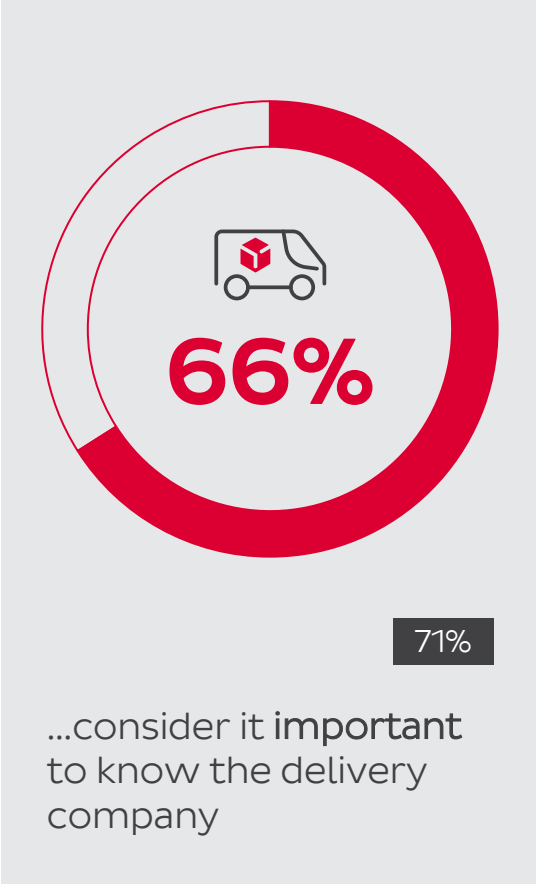


G1 – Have you already used the following delivery services?  
D10. On the day of delivery, did you receive an email or SMS notification to indicate you the approximate time your parcel will arrive?



# DELIVERY COMPANY

In terms of delivery, the trust in the delivery company remains to be important, especially for peace of mind, preferences in delivery company and will to choose the one offering a good delivery service.



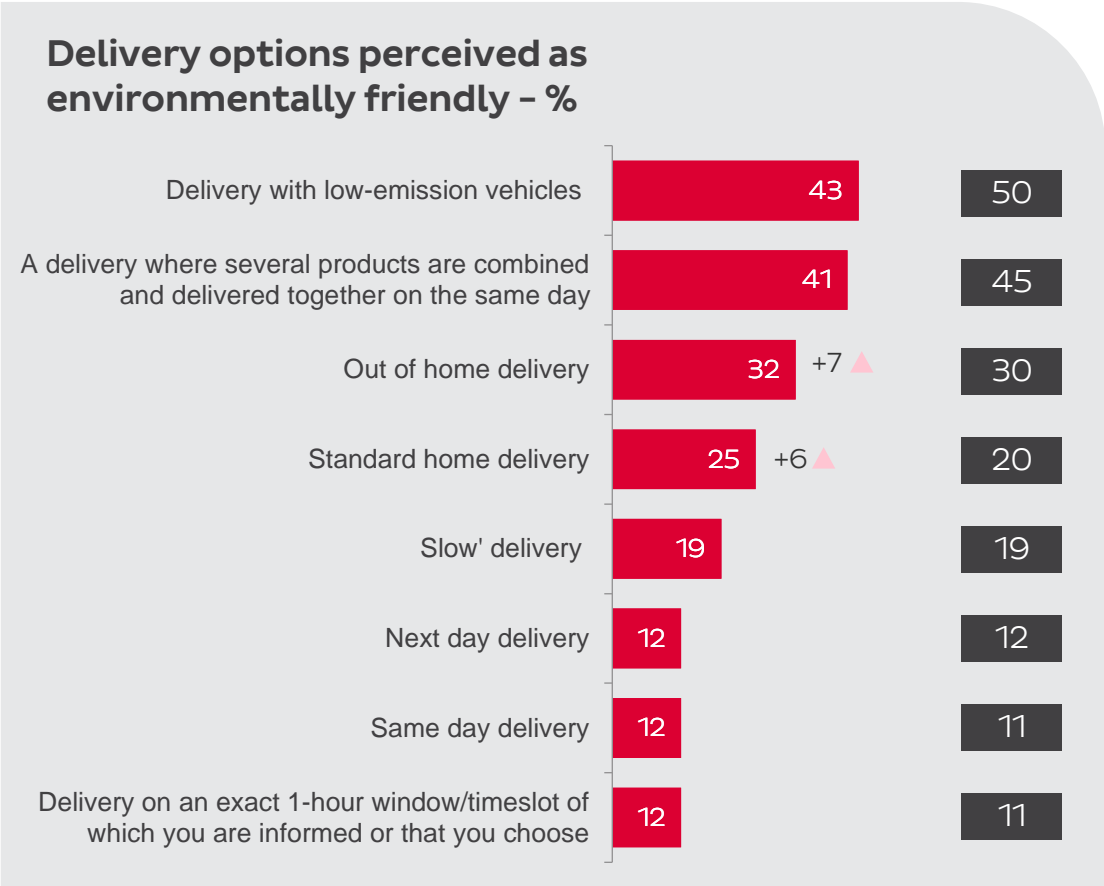
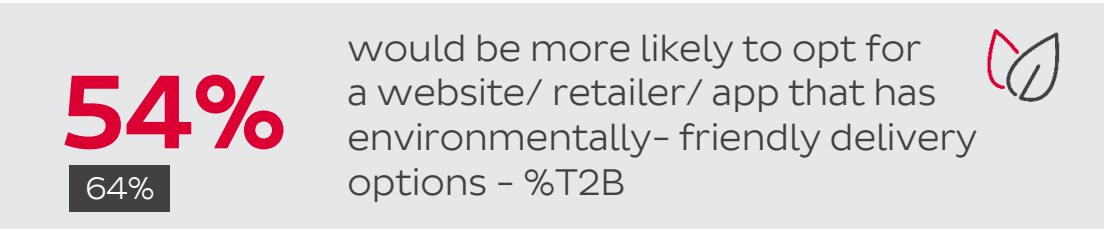
D15. In your opinion, is it important to know who the delivery company will be, before finalizing the purchase?  
D16. You said that for you it is important to know who the delivery company will be, before finalizing your purchase. Which of the following reasons apply to you? Base :think that it is important to know the delivery company before finalizing the purchase  
Rq: several answers allowed





# GREEN DELIVERY ALTERNATIVES

Having the choice of environmentally friendly delivery alternatives is losing importance for Belgian regulars: half of them would consider that as an important purchase driver.



51 B1. You will now see a list of criteria which may or may not be important to you when buying online. Which criteria are important for you?  
C16bis. Still thinking about the delivery, which of the following delivery options would you consider to be environmentally-friendly?  
C17ter. Would you be more likely to opt for a website/retailer/app that has environmentally-friendly delivery options?

# EFFORT AND SATISFACTION VS. ONLINE PURCHASE

There is an upward trend in satisfaction on delivery, purchase effort and return, even if the perception of delivery effort remains below 2019 levels and the European average.

## % - Delivery effort



... found the delivery easy/ effortless

72

## % - Last online purchase effort



... consider their last online purchase as easy

71

## % - Return effort



... found the return process easy/ effortless

55

## % - Rating of last online purchase experience



... consider their last online purchase experience as excellent or very good

78

# HIGH EFFORT INTO LAST PURCHASE ONLINE *New 2023*

## AMONG BUYERS MAKING THE MOST EFFORT

Issues related to the purchase itself (payment process, hosting website/app), and contacting retailer customer service for assistance represent the most common issues encountered by the regulars e-shoppers.

### TOP 10 Reasons of high effort into the last purchase online

Based on buyers making the most effort for their last online purchase (n=75)



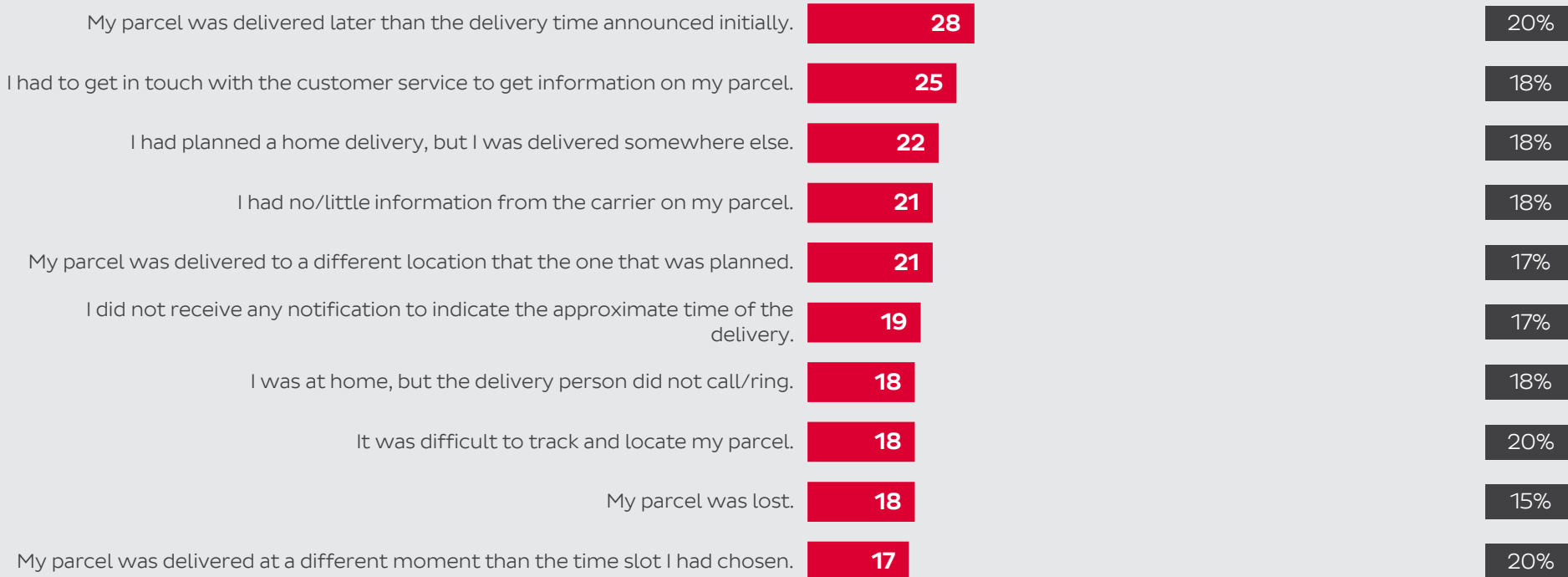
# HIGH EFFORT INTO DELIVERY

## AMONG BUYERS MAKING THE MOST EFFORT

In terms of delivery issues faced by regular e-shoppers, the most commons are related to a delay or issue in the delivery, as well as the need to contact customer service to get delivery information.

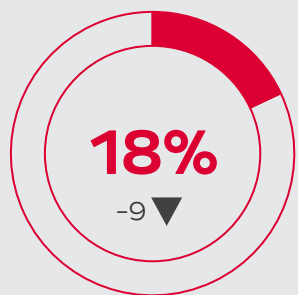
### TOP 10 Reasons of high effort into the delivery

Based on buyers making the most effort for delivery (n=76)



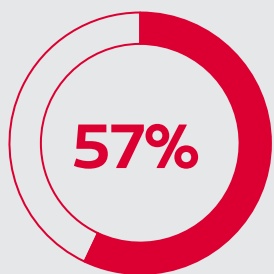
# RETURNS

Concerning parcel returns, less Belgian regulars returned their last parcel. And more than half found the return process as easy.



... returned their last purchase

14%



... Found it easy/effortless (n=260)

55%

## Top 3 Return Methods n=260

47%

Dropping it off at a post office/ post station

40%

33%

Dropping it off at a parcel shop

34%

22%

Dropping it off at a parcel locker station

20%

Biggest evolutions vs. 2022 (apart from TOP3)

*No other evolution*

# HIGH EFFORT INTO RETURN *New 2023*

## AMONG BUYERS MAKING THE MOST EFFORT

There are many reasons why regular e-shoppers find the return not easy: having to travel a long way, having to re-pack, but also the late refund and frustration with the product which is not as expected.

### TOP 10 Reasons of high effort into the return

Based on buyers making the most effort for return (n=54)





# ZOOM ON THE AFICIONADOS

Compared to the regulars, the Aficionados put more effort into purchase, delivery and return.

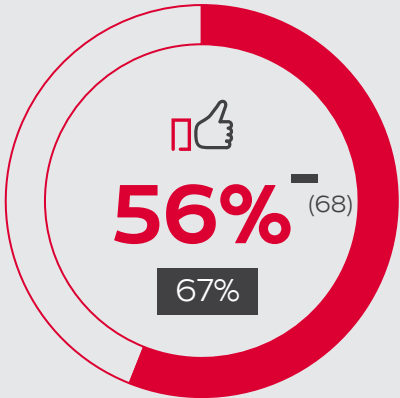
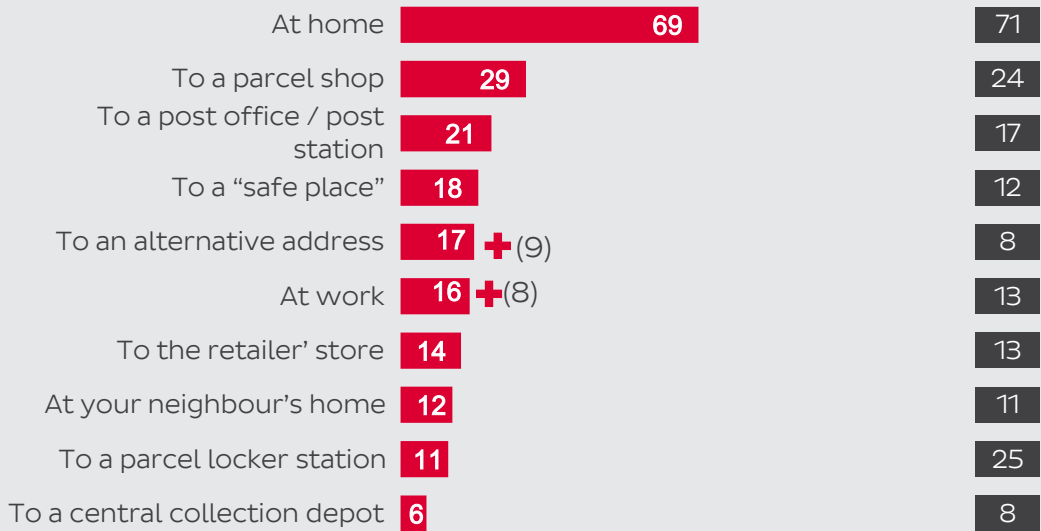


# DELIVERY PREFERENCES



Belgian Aficionados tend to use a bit more delivery places than their regulars' counterparts, more of them being delivered at an alternative address and at work. Compared to the regulars, they are less to find the delivery easy.

### Usual delivery places-%



... found delivery easy/effortless

2.1 + (1.9)  
2.1 Delivery places on average

58% 56%

Usually use more than one delivery place

43% 46%

Are delivered out of home (parcel locker, parcel shop or retailer store)

D14. How much effort did you have to put into the delivery (e.g. tracking, picking up, receiving, etc...) of your last online purchase?  
C14. Where do you usually have your parcels delivered to?

# EFFORT AND SATISFACTION VS. ONLINE PURCHASE

The Aficionados put more effort than the regular for purchase, delivery and return. However, they maintain a high and stable level of satisfaction about their last online purchase experience.



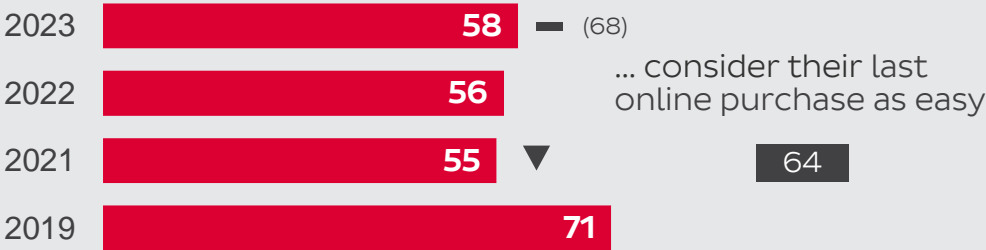
## % - Delivery effort



... found the delivery easy/ effortless

67

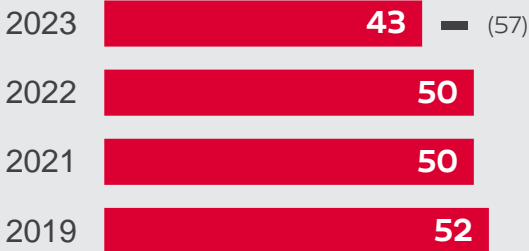
## % - Last online purchase effort



... consider their last online purchase as easy

64

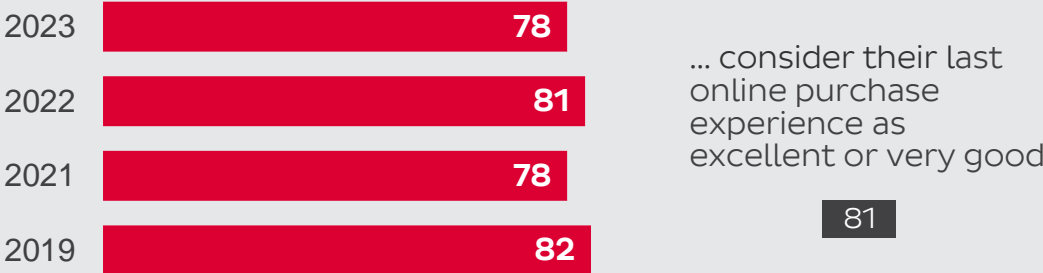
## % - Return effort



... found the return process easy/ effortless

49

## % - Rating of last online purchase experience



... consider their last online purchase experience as excellent or very good

81

+ — vs. regular e-shoppers at 95% confidence rate

XX

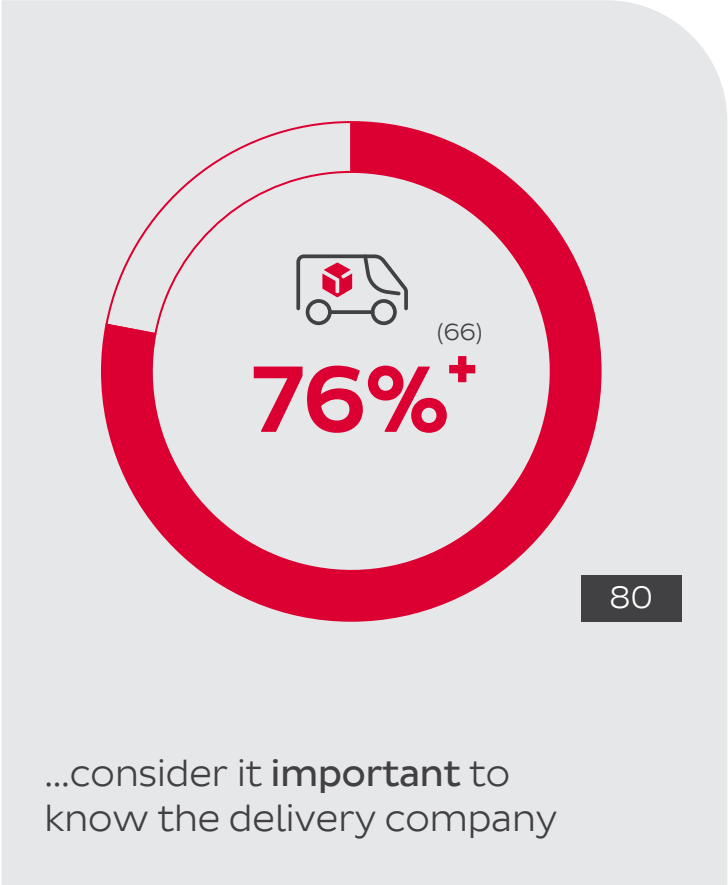
European average

▲ ▼ Significant increase/ decrease vs. previous year

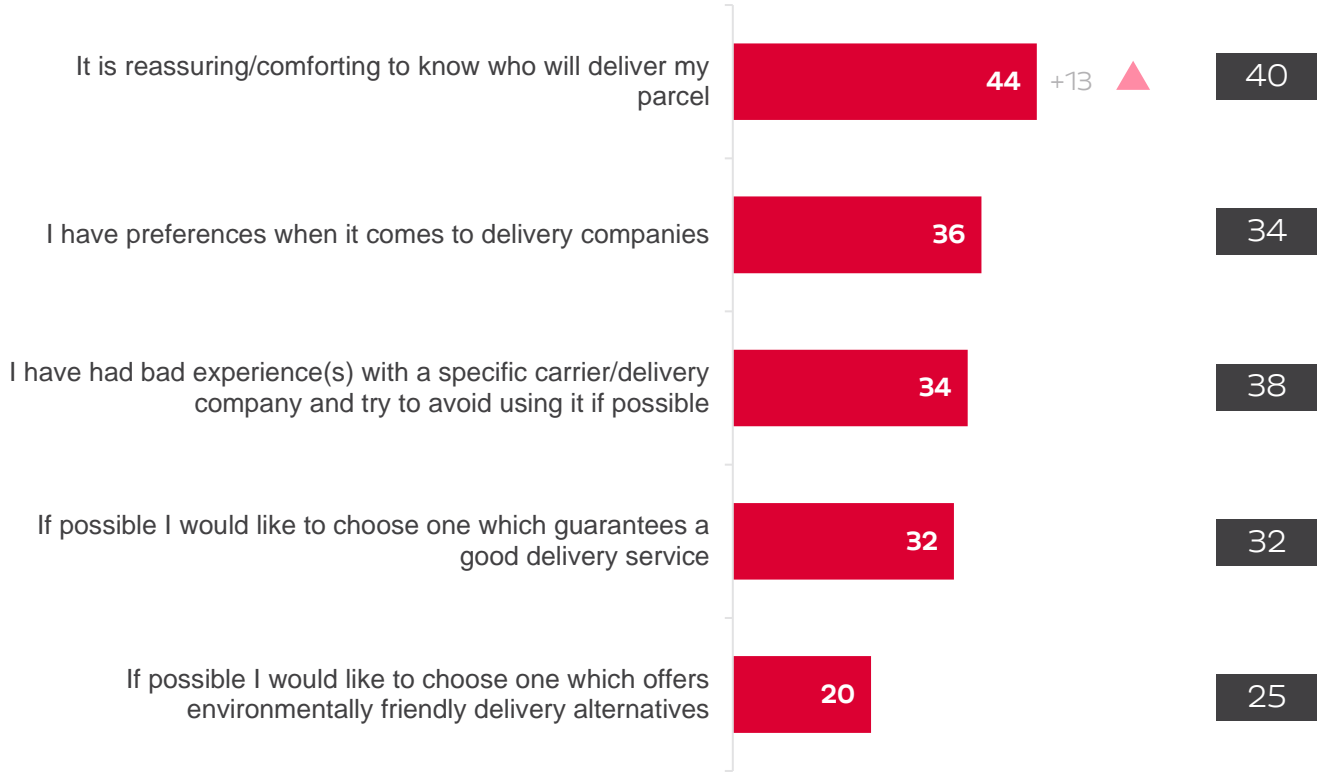
# DELIVERY COMPANY



Knowing the delivery company remains important to most of Belgian Aficionados, and more than to regular e-shoppers, especially for reasons of peace of mind – even more important this year.



Reasons of importance to know the delivery company % (n=116)



D15. In your opinion, is it important to know who the delivery company will be, before finalizing the purchase?  
D16. You said that for you it is important to know who the delivery company will be, before finalizing your purchase. Which of the following reasons apply to you? Base :think that it is important to know the delivery company before finalizing the purchase  
Rq: several answers allowed