



Belgian online shopper survey 2021

Prepared for:



And its research partners:



WHY5
research

Partner presentation, 21/05/2021

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- Frequency & categories
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- Payment
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Additional insights

- Innovations
- Promotions
- Marketplaces
- Sustainability



Belgian online shopper survey 2021

Partner presentation, 21/05/2021
Prepared by WHY5Research

01. Context

01 The research

How?

W – WHAT

- A quantitative study by means of an online questionnaire.
- Yearly monitor - 5th edition

W – WHO

- A national representative sample of Belgian online shoppers (roughly N=400).
- Representative in terms of gender, age and region.

W – WHY

- To measure evolutions in attitudes and quantify online shopping motivations

W – WHEN

- Fieldwork in April 2021



02. Sample description

02 Sample description

Representative sample of online shoppers

405

Belgian online shoppers participated in this study

The sample is representative in terms of gender, age (18-65) and region, but is also for other socio-demographic variables (living situation, education) (virtually) identical to all previous waves



02 Sample description

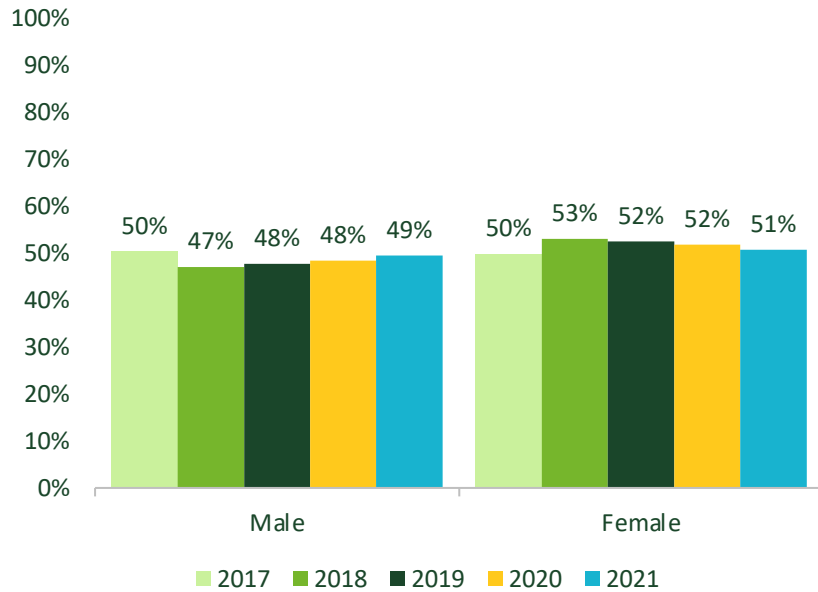
Representative sample of online shoppers

405

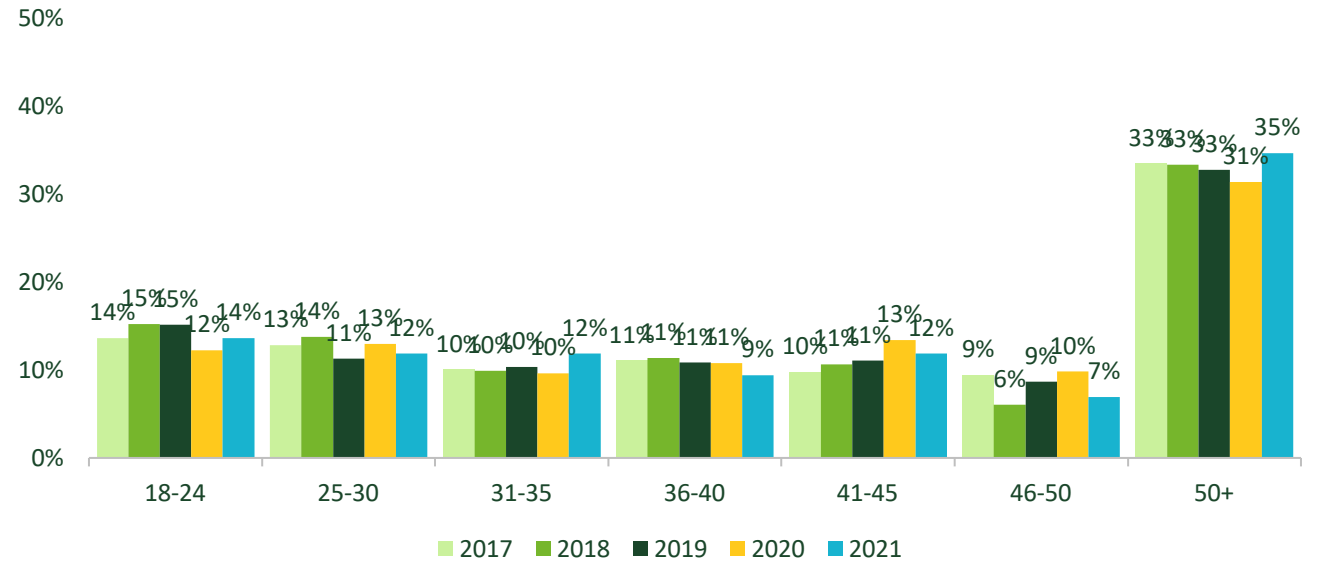
Belgian online shoppers participated in this study



Gender



Age



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

Base: total samples 2017 (N=522) 2018 (N=415) 2019 (N=416) 2020 (N=418) 2021 (N=405)

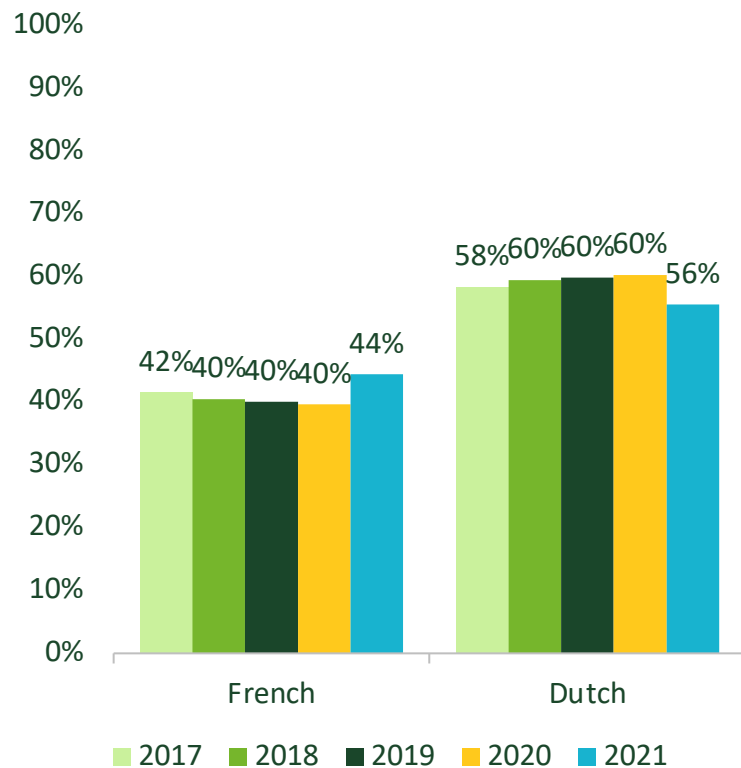
↑ Significantly higher/lower
↓ compared to 2020 (c.i. 95%)

02 Sample description

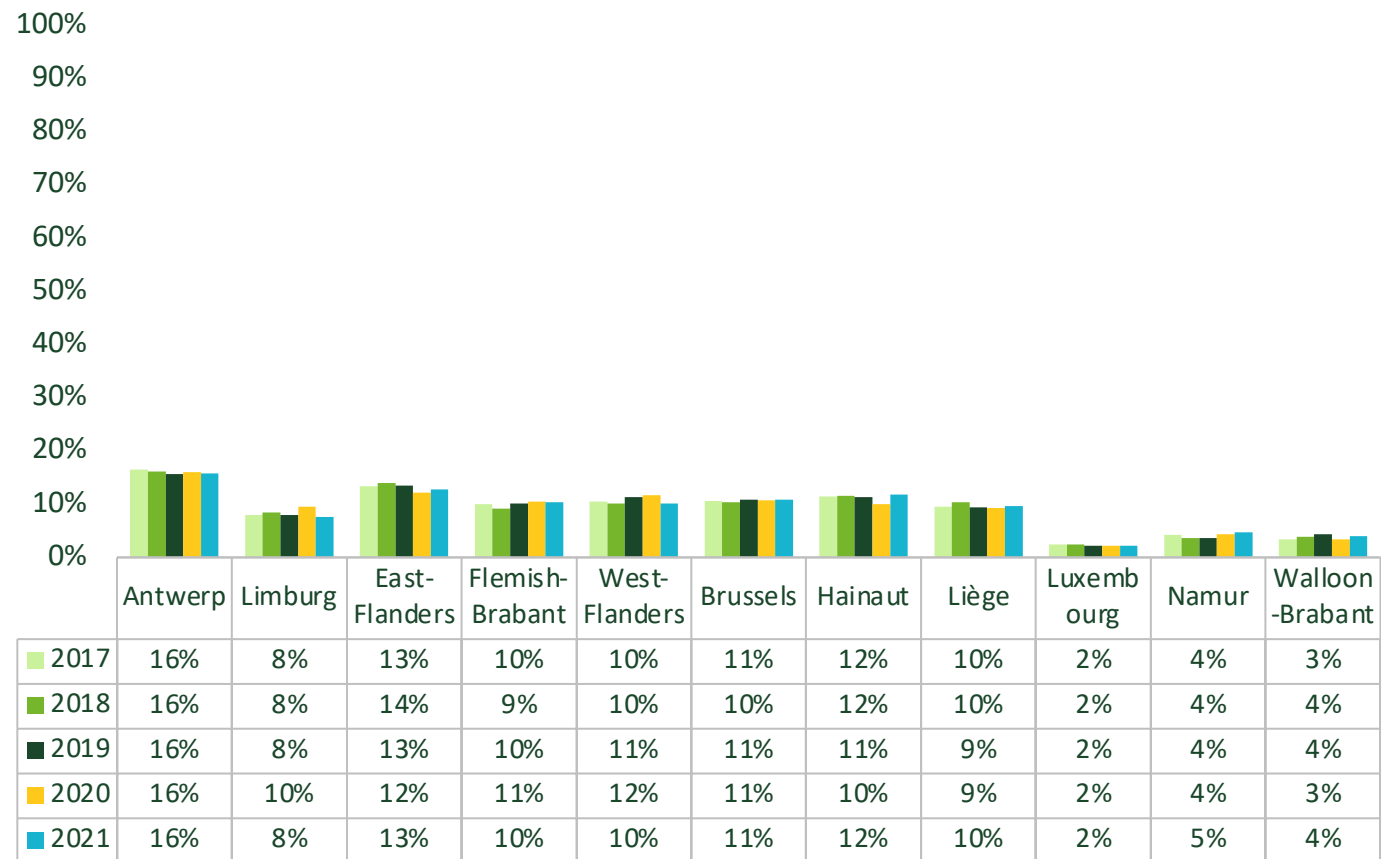
Representative sample of online shoppers



Language



Region



S3. What is your postal code?
 Base: total samples 2017 (N=522) 2018 (N=415) 2019 (N=416) 2020 (N=418) 2021 (N=405)

↑ Significantly higher/lower
 ↓ compared to 2020 (c.i. 95%)

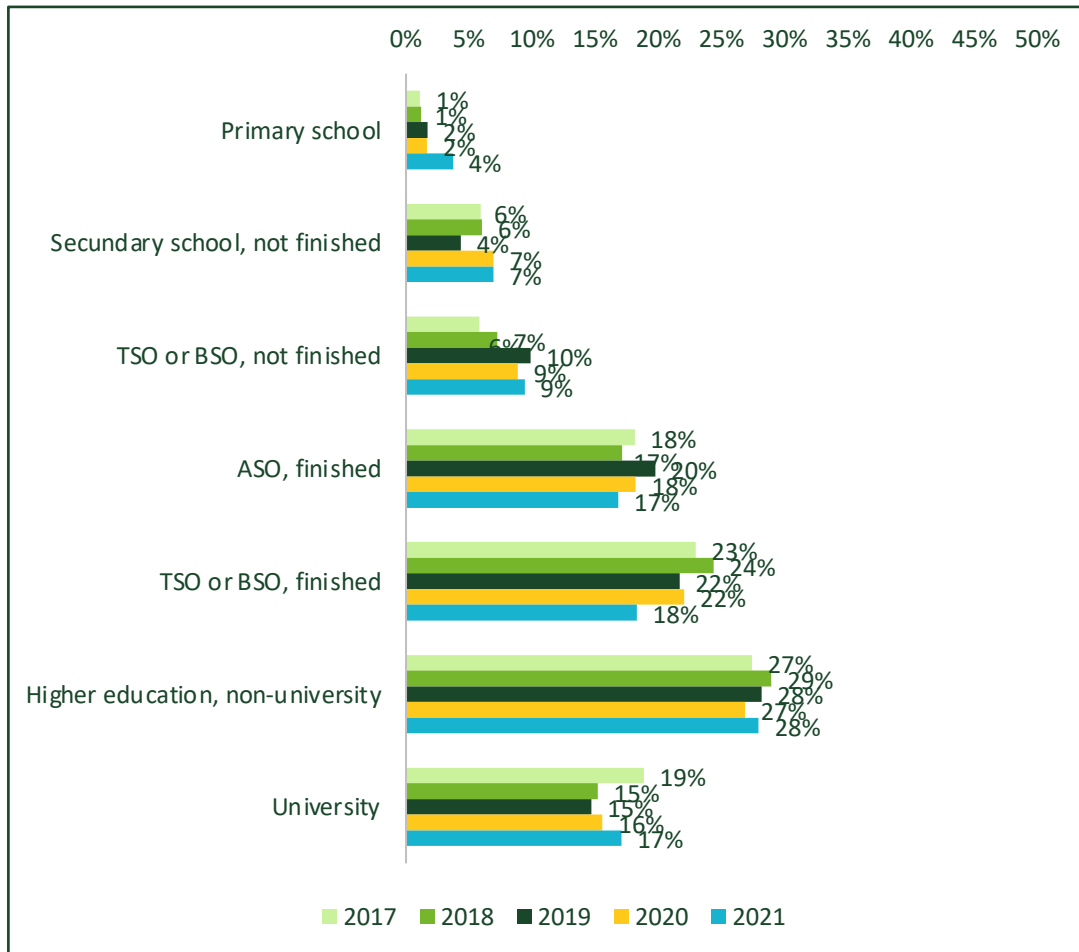


02 Sample description

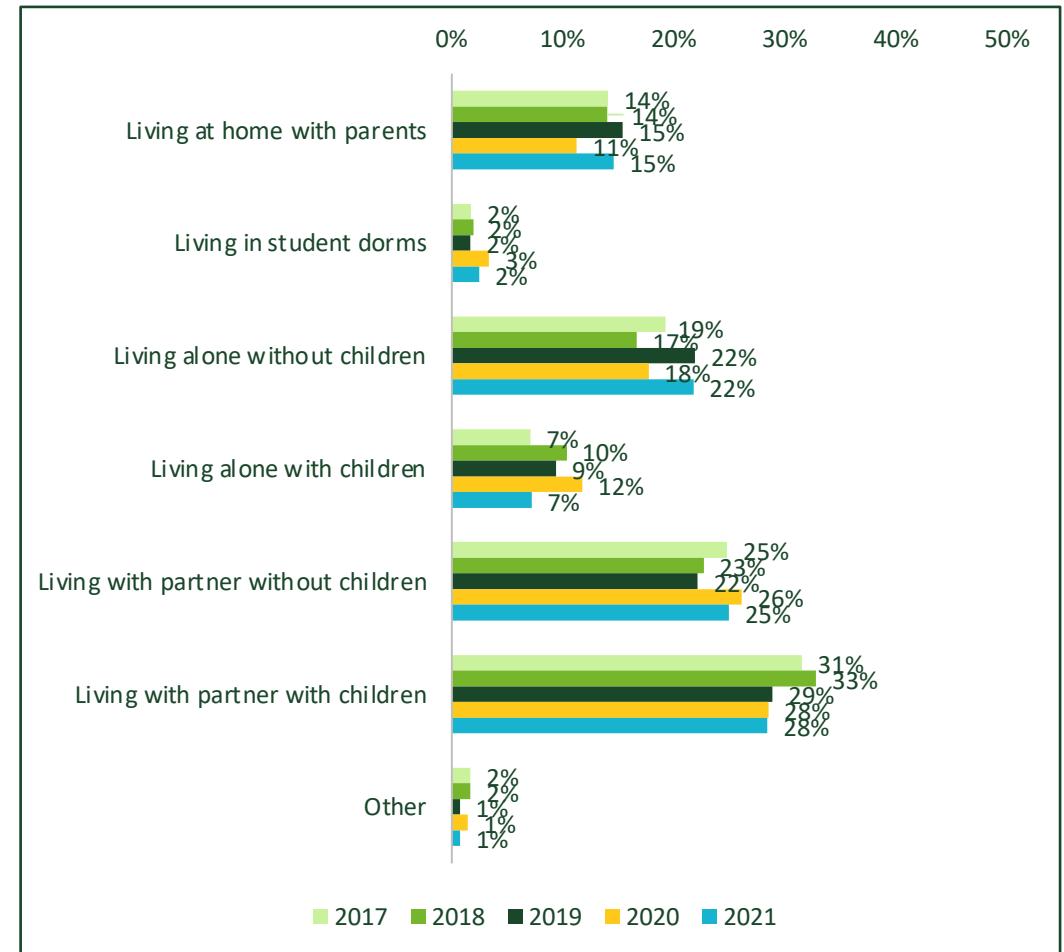
Representative sample of online shoppers



Education



Living situation



Q4.1 How would you best describe your living situation? Q4.4 what is your level of education?
 Base: total samples 2017 (N=522) 2018 (N=415) 2019 (N=416) 2020 (N=418) 2021 (N=405)

↑ Significantly higher/lower
 ↓ compared to 2020 (c.i. 95%)

03. Online shopping habits



03. Online shopping habits

Frequency and categories



03 Online shopping habits

1 Frequency

1 During the COVID pandemic people started to **shop more frequently online**: almost half said they've bought more online compared to the year before.

2 The **habit of shopping more online has been installed** and will not go back to previous pre-covid level – Even with the big increase of online shopping during last year, **1 in 4** still believes to **shop even more online in the next year**.

3 The **scope** of online bought **categories online** has gotten **wider** in the last year.



5?



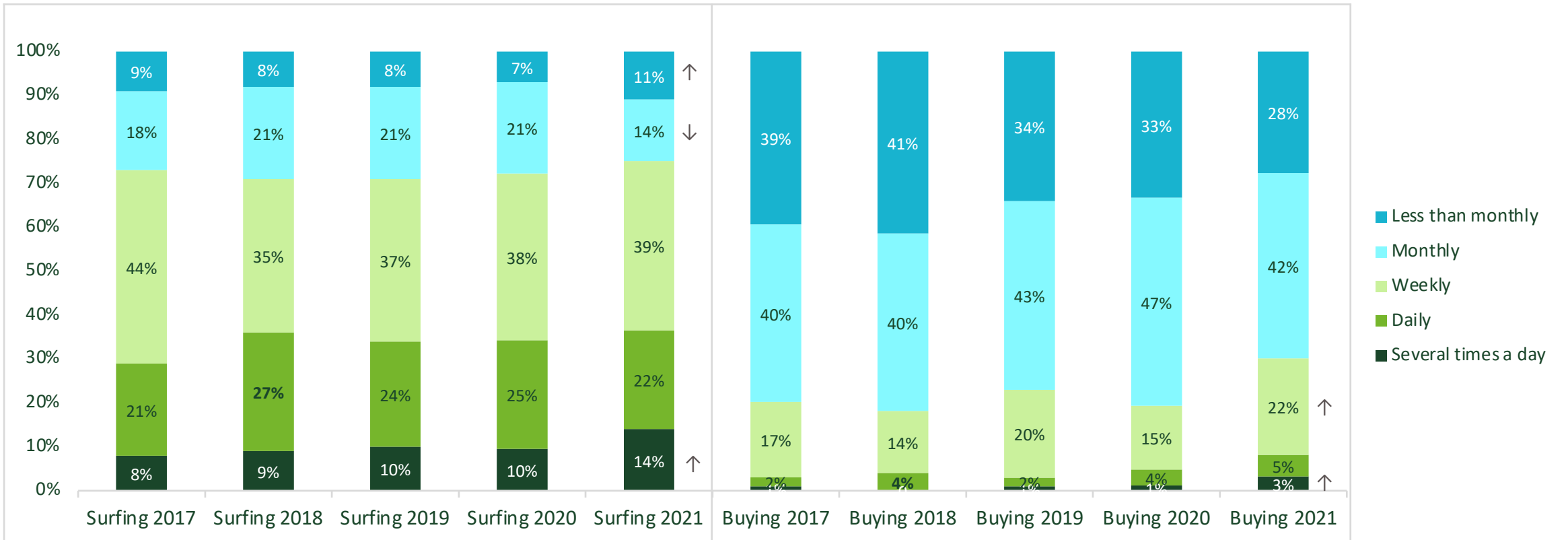
03 Online shopping habits

1 Frequency

Frequency of online shopping has increased from 20% weekly plus in February 2020 (right before the COVID-19 crisis) to 30% in 2021.

How often do you visit webshops?

How often do you buy something online?



Q1.1 How often do you browse webshops? Q1.2 How often do you buy something online? (SR)
 Base: total samples 2017 (N=522) 2018 (N=415) 2019 (N=416) 2020 (N=418) 2021 (N=405)

↑ Significantly higher/lower
 ↓ compared to 2020 (c.i. 95%)

03 Online shopping habits

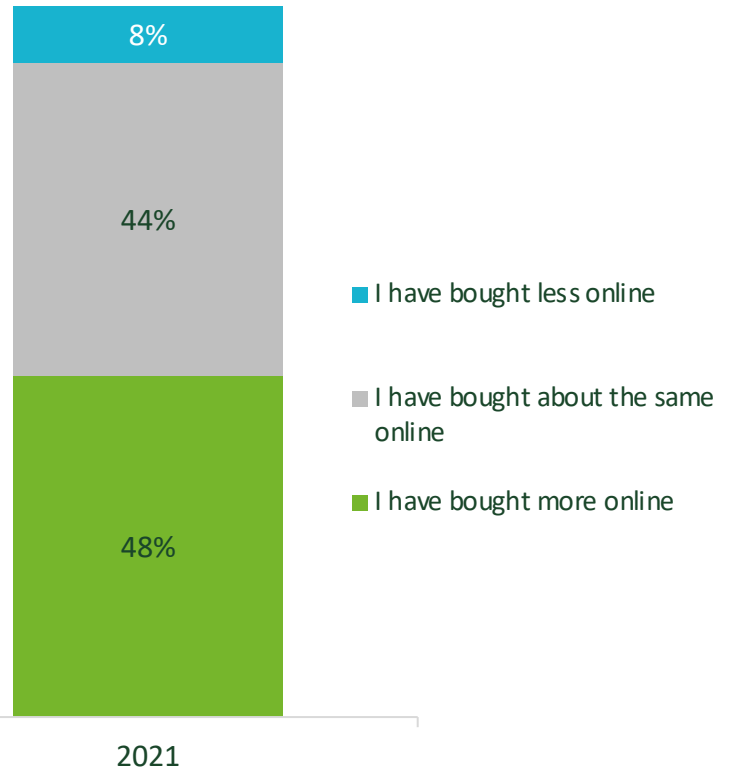
1 Impact of Covid-19

Right before the outbreak, 29% of shoppers estimated to buy more online in the coming year. But the Covid-19 situation, led to an actual increase of 48%.

Online shoppers in 2020, right before the COVID-19 outbreak, reflecting on their intentions to shop online in the coming year:



Online shoppers in April 2021, about their online shopping in the past 12 months:



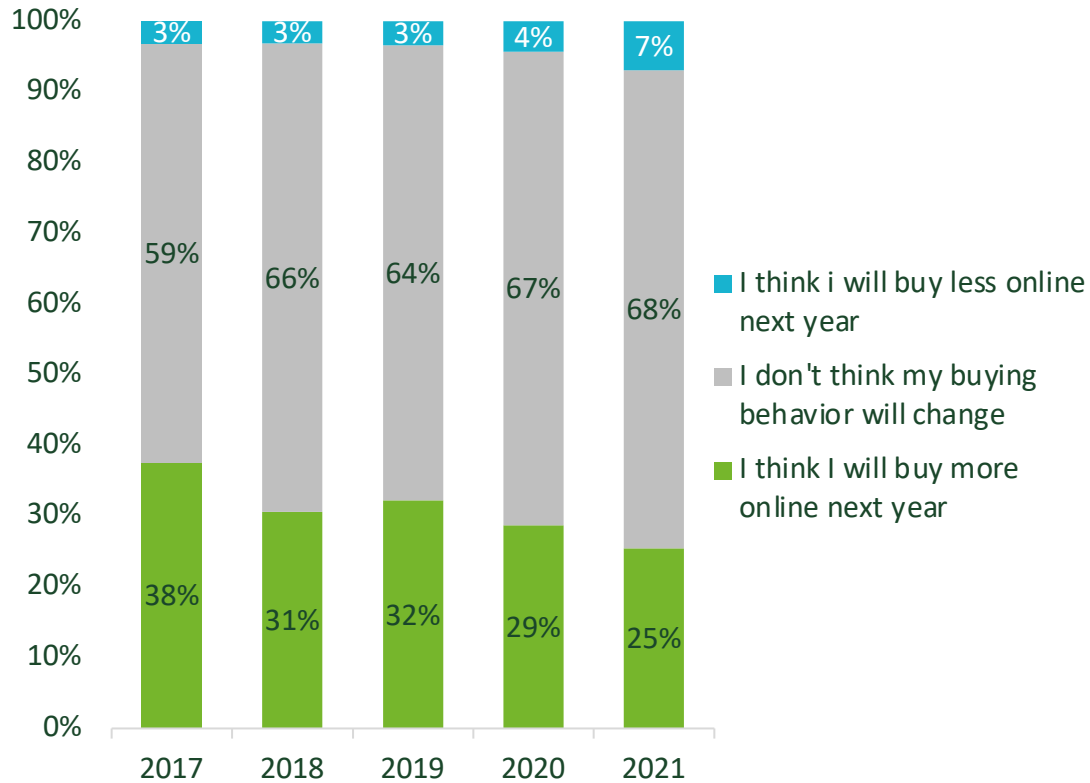
Q1.14 Do you think your online shopping habits will change over the next year? (SR)
Q1.14a Have you bought more or less in the past year compared to the year before? (SR)
Base: total sample 2020 (N=418) 2021 (N=405)



03 Online shopping habits

1 Future behavior

Even with the increase in online shopping from last year, 1/4 think they will buy even more next year.



Q1.14 Do you think your online shopping habits will change over the next year? (SR)
Base: total samples 2017 (N=522) 2018 (N=415) 2019 (N=416) 2020 (N=418) 2021 (N=405)



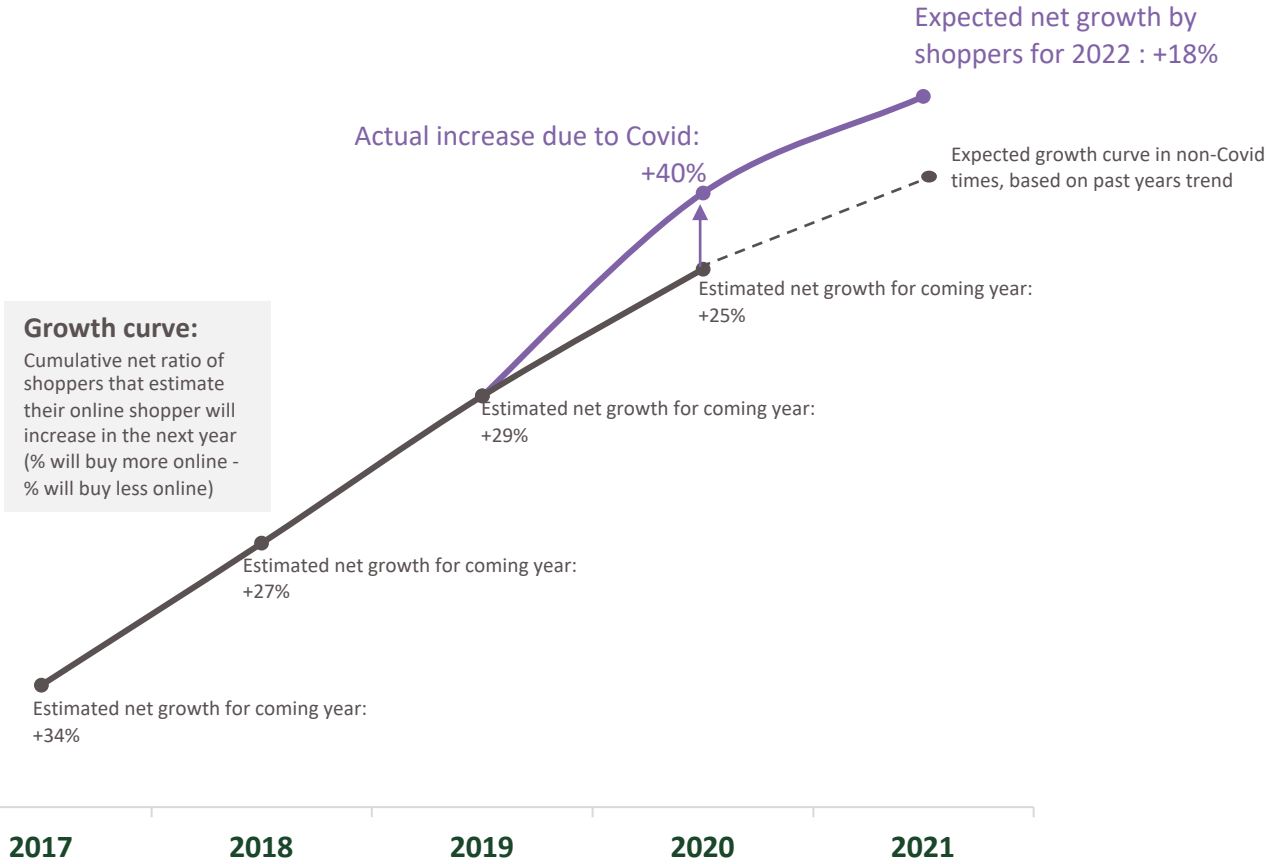
↑ Significantly higher/lower
↓ compared to 2020 (c.i. 95%)



03 1

Online shopping Growth curve

Due to Covid19, the growth curve raised in 2021 above expectations. Shoppers estimate that the growth curve will flatten somewhat in the coming year, but will not drop back to pre-Covid level.



Q1.14 Do you think your online shopping habits will change over the next year? (SR)
Base: total samples 2017 (N=522) 2018 (N=415) 2019 (N=416) 2020 (N=418) 2021 (N=405)

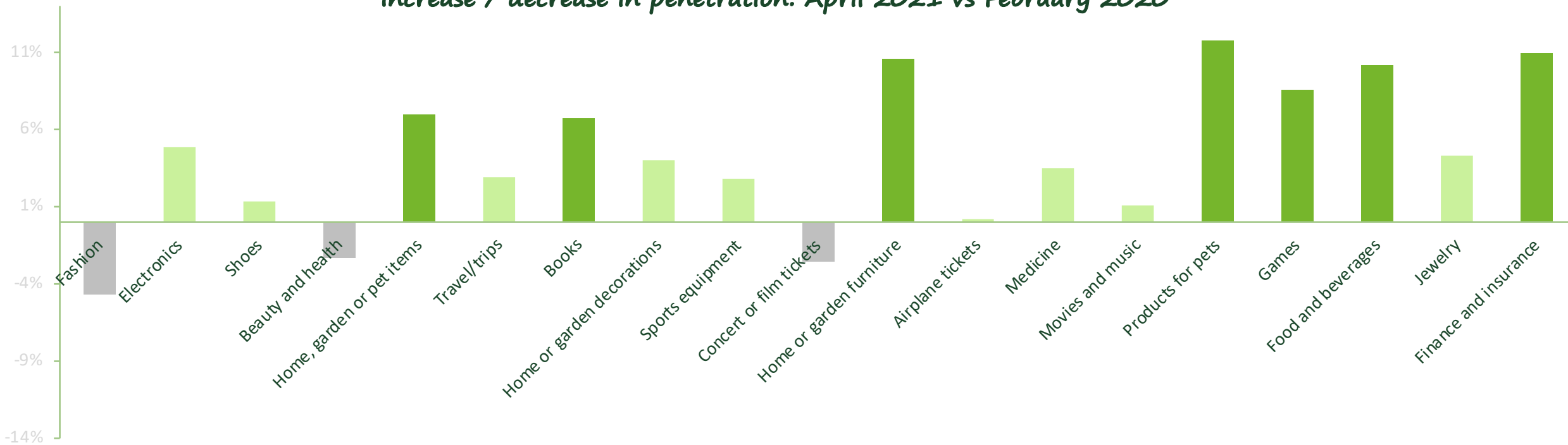
03 Online shopping habits

1 Penetration of product categories

Some categories have increased in penetration: with home, garden and pets products as important growth categories together with games, food & beverages and finance & insurance.

Categories with decrease in purchase penetration were fashion, beauty & health and tickets.

Increase / decrease in penetration: April 2021 vs February 2020



Q1.3 How often do you buy the following product categories online? % ever
Base: total samples 2020 (N=418) 2021 (N=405)

03 Online shopping habits

1 Penetration of product categories

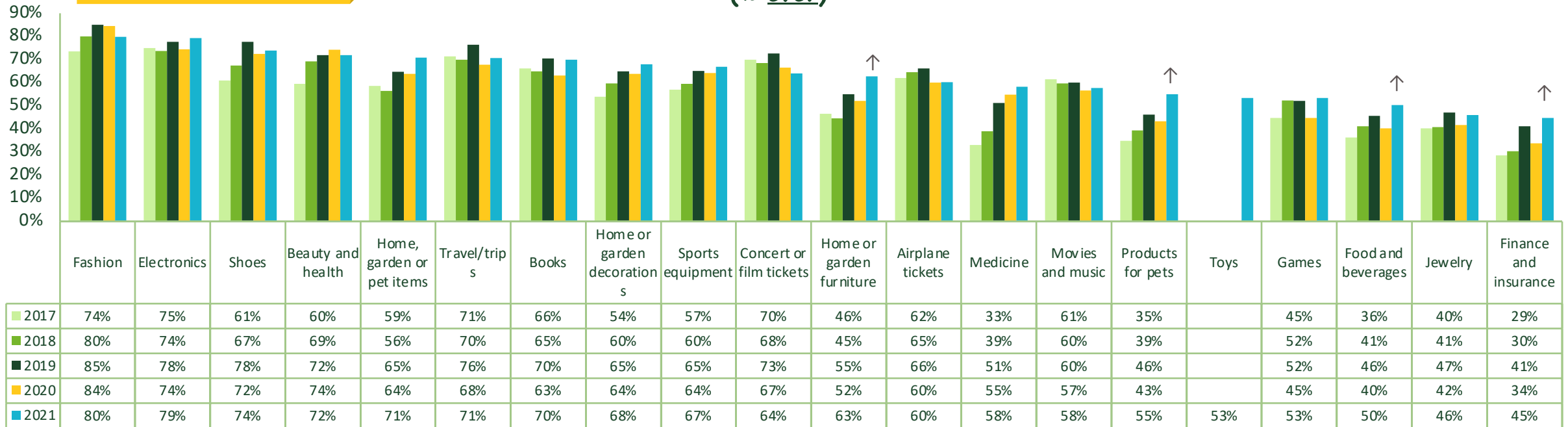
These percentages are not based on buying behaviour of the last year, but ever bought.

Therefore Covid effects are less visible on categories such as travel, airplane tickets etc.

However, what we do see is the growing online penetration of some categories.

Some categories have increased in penetration: with home, garden and pets products as important growth categories together with games, food & beverages and finance & insurance.

*Which of these categories do you buy online?
(% ever)*



Q1.3 How often do you buy the following product categories online? % ever
Base: total samples 2017 (N=522) 2018 (N=415) 2019 (N=416) 2020 (N=418) 2021 (N=405)

↑ Significantly higher/lower
↓ compared to 2020 (c.i. 95%)

03. Online shopping habits

Devices used to shop online



03 Online shopping habits

2 Online shopping devices

1

Computer and **smartphone** are still the most used devices for online shopping. The increasing trend of **smartphone seems to be stabilizing**. This might be caused by COVID.

2

The use of an **app for online shopping** also kept on **increasing**. The preference for app versus website is now close to 50/50.



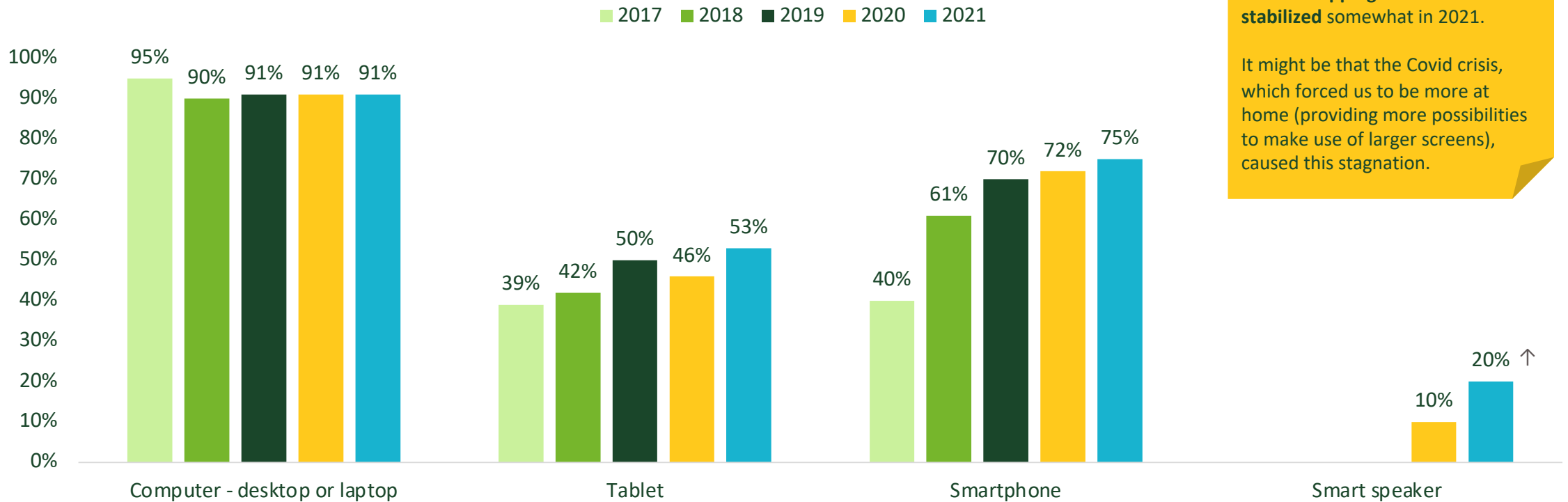
Online shopping habits

Devices

Computer and smartphone remained the most used devices for online shopping.

- Some stagnation in the growing penetration of smartphone as online shopping device.
- There is a **significant increase** in the use of smart speakers compared to 2020.
- Smartphones are more often used by younger lifestages (-46 year) and smart speakers by people in their thirties.

Which device do you use when you shop online?
(% ever use)



Increase in **smartphone** use as **online shopping device** has **stabilized** somewhat in 2021.

It might be that the Covid crisis, which forced us to be more at home (providing more possibilities to make use of larger screens), caused this stagnation.

Q1.5 What device do you usually use when shopping online? % ever
Base: total samples 2017 (N=522) 2018 (N=415) 2019 (N=416) 2020 (N=418) 2021 (N=405)

↑ Significantly higher/lower
↓ compared to 2020 (c.i. 95%)



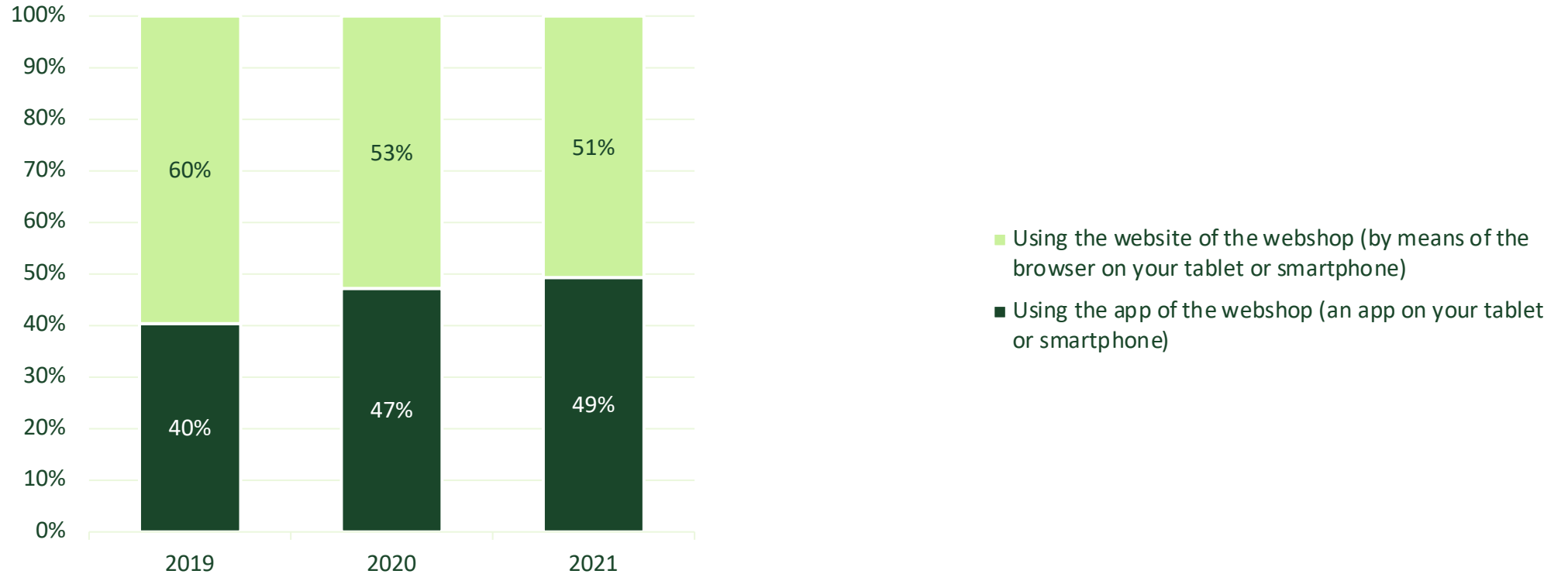
03 Online shopping habits

2 Mobile shopping

The preference for using the app of a webshop is still increasing

- From 40% in 2019 to 47% in 2020 and 49% in 2021.
- There is **50-50 distribution** in the preference for an app or a website.

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



Q1.6. How do you prefer to shop online on your mobile? (SR)
Base: People who shop online using their smartphone 2019 (N=290) 2020 (N=303) 2021 (N=302)

↑ Significantly higher/lower
↓ compared to 2020 (c.i. 95%)



03. Online shopping habits

Delivery and Payment



03 Online shopping habits

3 Delivery and Pay

1

Most people still prefer **home delivery**. But when missing the home delivery, the opinions are divided on what to do with the package: majority prefers drop off around the house or at the neighbors. **Only 17%** would prefer a **second delivery at home**.

2

PayPal and **debit cards** remained the most preferred ways for online payment in Belgium. Significant **increase** in preference of paying with **credit card**.



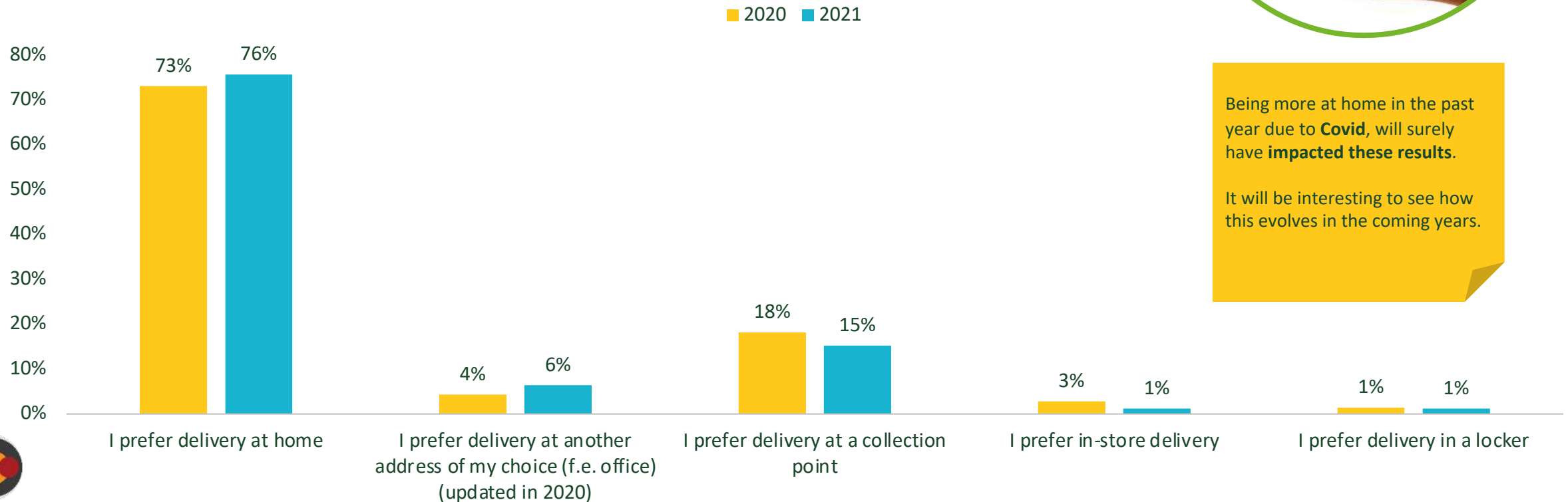
03 Online shopping habits

3 Delivery

Delivery at home is still the most preferred option.



Where do you prefer to have your order delivered?



Being more at home in the past year due to **Covid**, will surely have **impacted these results**.
It will be interesting to see how this evolves in the coming years.



Q1.17a Where do you prefer to have your order delivered? (SR)
Base: total sample 2020 (N=418) 2021 (N=405)

Online shopping habits

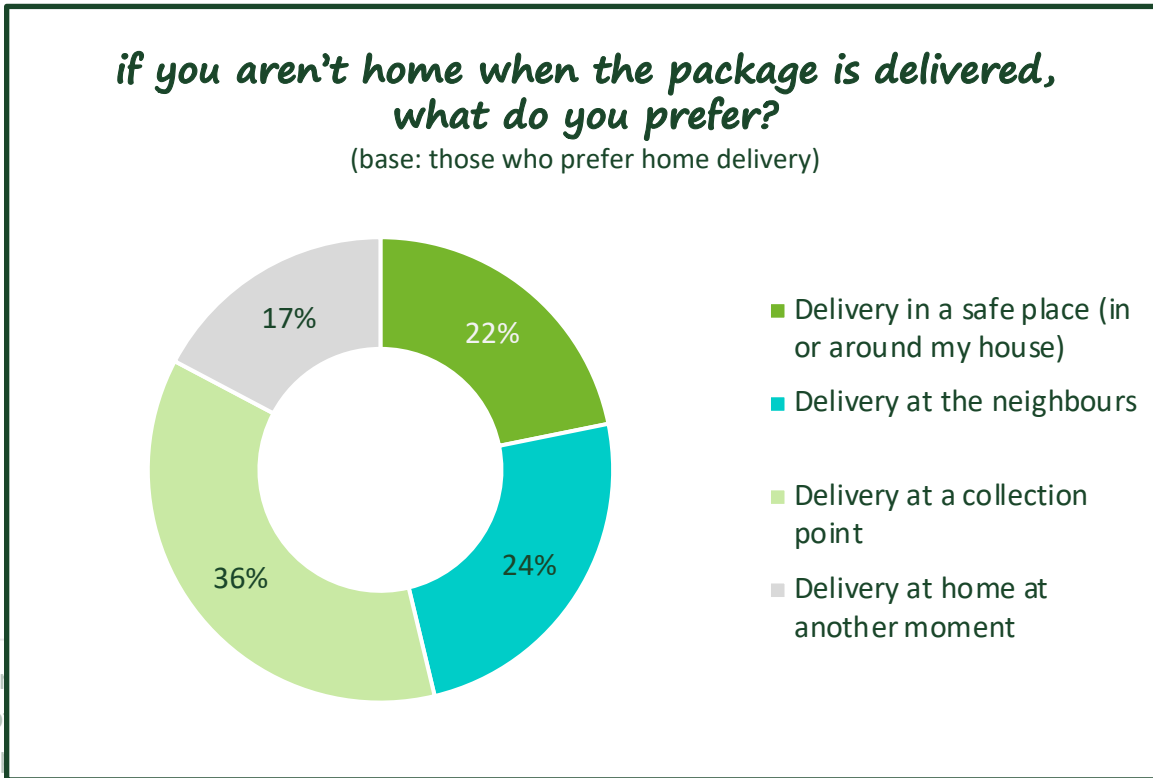
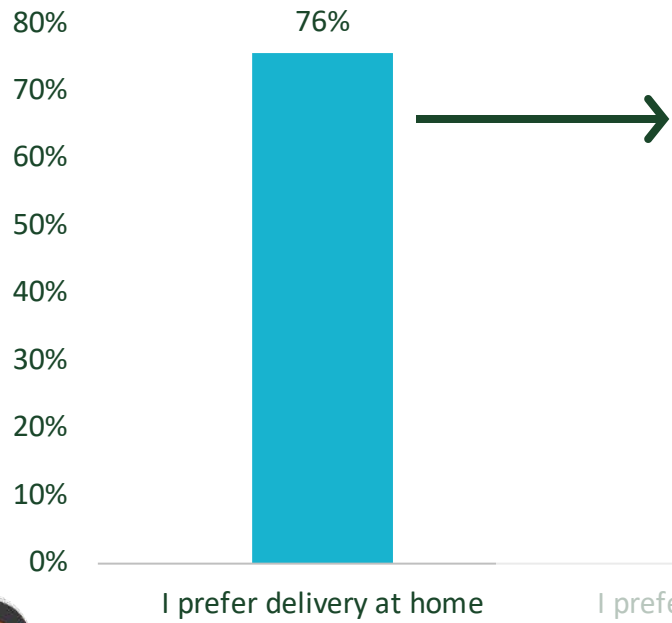
Delivery

When people aren't home at moment of delivery, the opinions on what to do with the package are divided.

- Delivery at a collection point is overall the most preferred option (1/3 prefers this solution).
- Only 17% would prefer a second delivery at home.



Where do you prefer to have your order delivered?



Q1.17c You indicated that you prefer home delivery, but what if you are not home at the time of delivery, what do you prefer? (SR)
Base: people who prefer home delivery (N=307)

03 Online shopping habits

3 Delivery

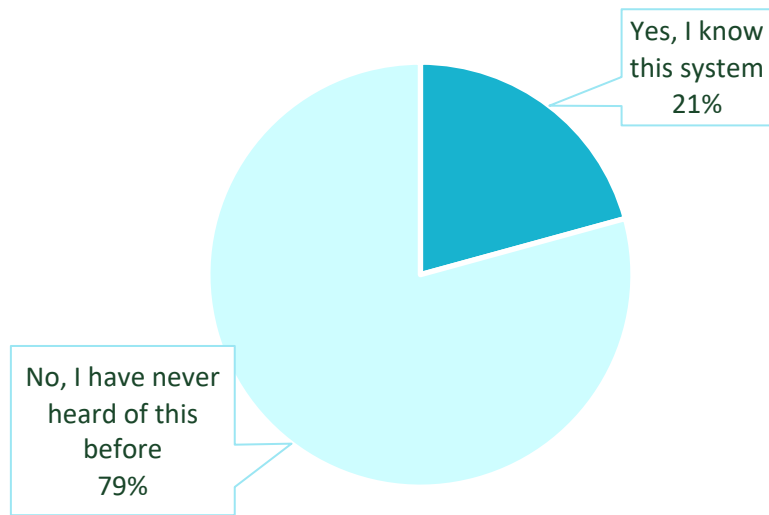
Awareness of Social Pudo's is limited:

- 1 in 5 knows it
- 1 in 10 has ever used it

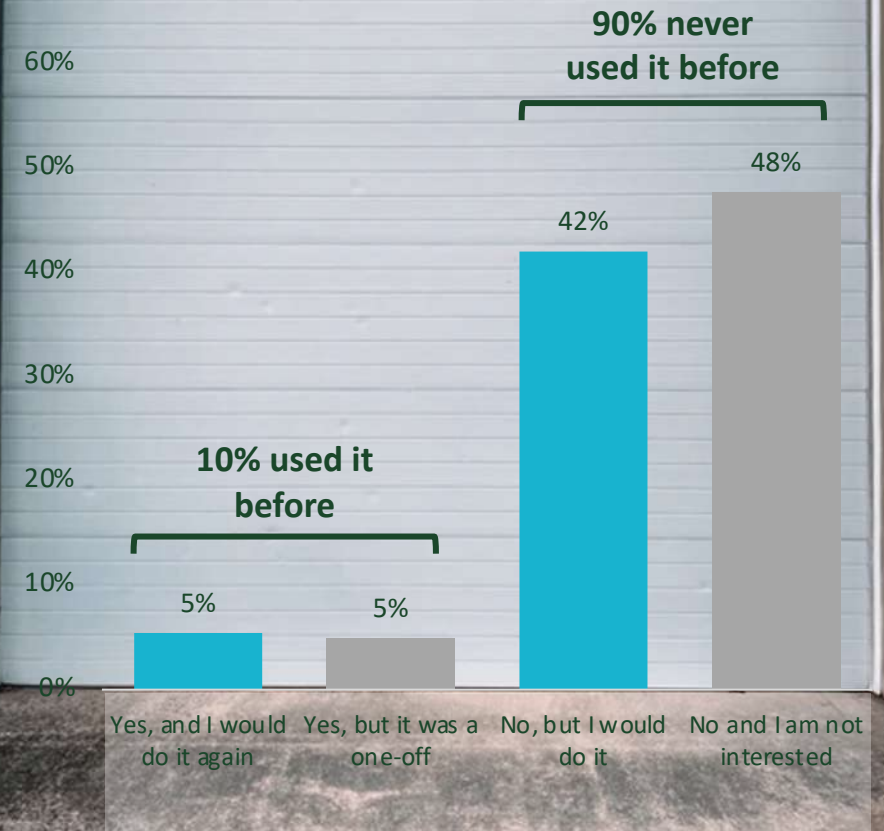
But interest is quite high:

- 49% is interested to make use of it in the future

Do you know the system named Social PUDO's (abbreviation of Pick-Up/Drop-Off)?



Have you ever used a Social Pick-Up/Drop-Off (Pudo)?



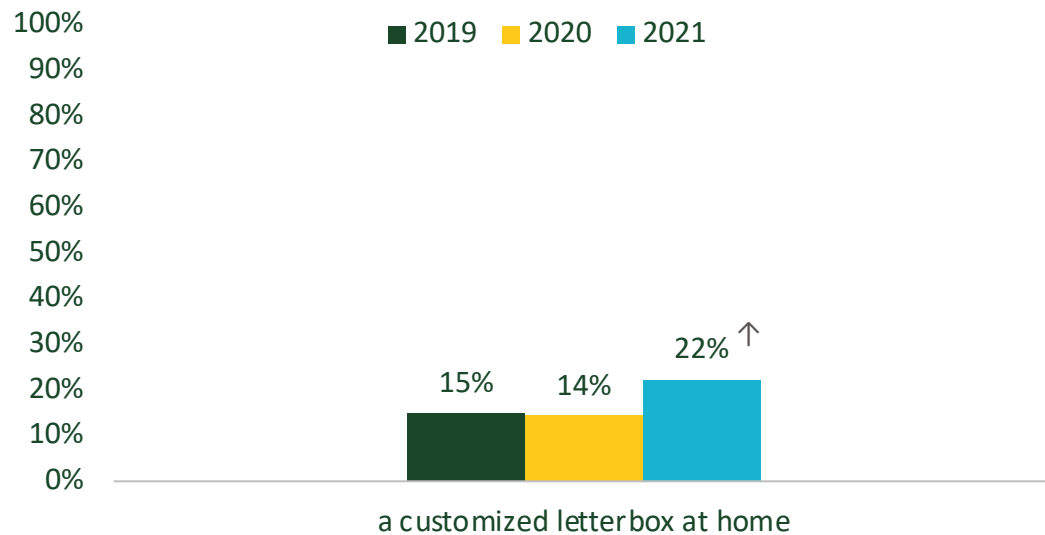
Q1.17d Do you know the system named Social PUDO's (abbreviation of Pick-Up/Drop-Off)?
 Q1.17e Have you ever used a Social PUDO pick-up point?
 Base: total sample 2021 (N=405)

03 Online shopping habits

3 Delivery

There is an increase in the amount of people who have a customized letterbox at home.

Do you have a customized letterbox at home, a so-called package letterbox, in which parcels can also be delivered?



Q1.18a. Do you have a customized letterbox at home, a so-called package letterbox, in which parcels can also be delivered? Base: total samples 2019 (N=416) 2020 (N=418) 2021 (N=405)

↑ Significantly higher/lower compared to 2020 (c.i. 95%)
↓

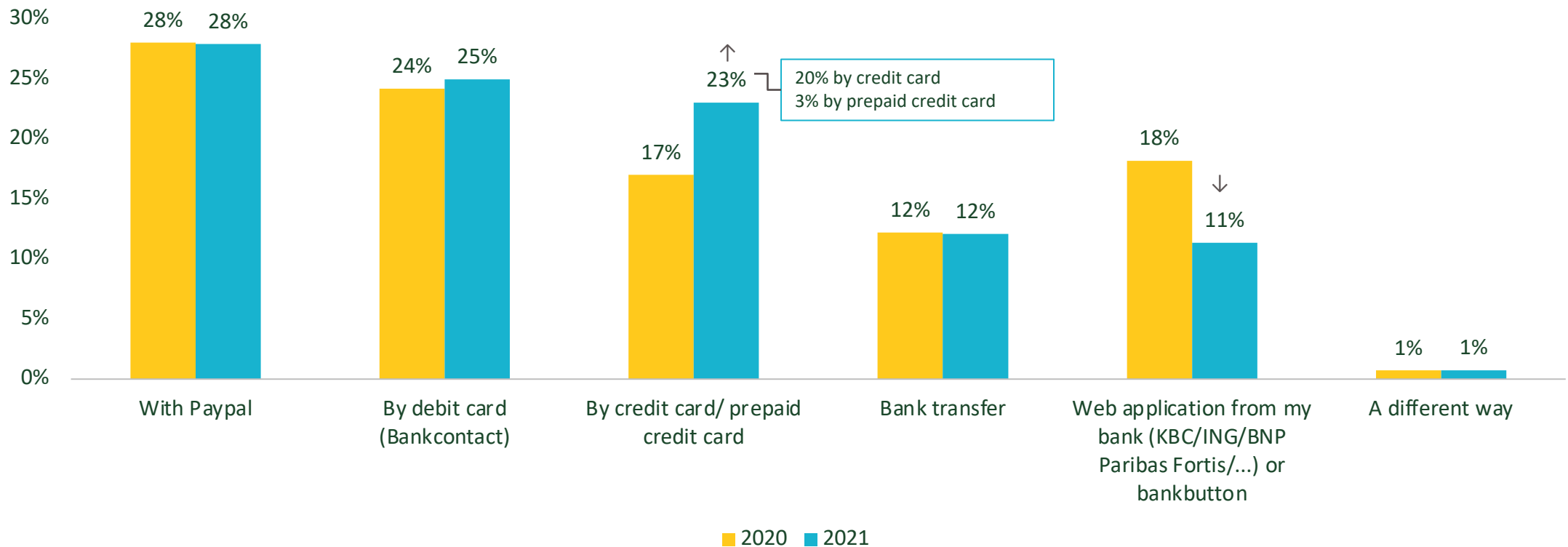
03 Online shopping habits

3 Payment

Credit card has increased in preference.

- There is a significant decrease in the preference for a web application or bank button compared to 2020.

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



Q1.12 How do you prefer to pay when you buy something online? (SR)
Base: total sample 2020 (N=418) 2021 (N=405)

↑ Significantly higher/lower
↓ compared to 2020 (c.i. 95%)

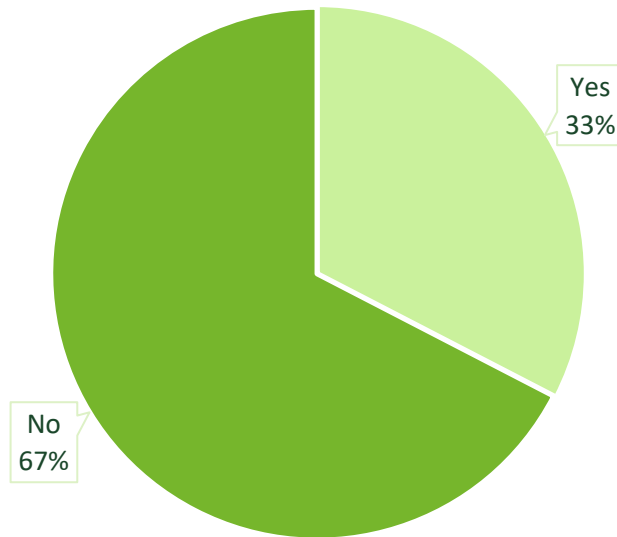
03 3

Online shopping habits Payment

Only 1/3 knows you can pay online with meal and eco vouchers.

- Only 16% has ever paid online with meal or eco vouchers
- But 56% is interested in doing it.

Did you know you can pay online with meal/eco vouchers?



Have you ever bought anything online with meal/eco vouchers?



Q1.13aNEW Did you know you can pay online with meal/eco vouchers?
Q1.13 Have you ever bought anything online with meal/eco vouchers?
Base: total sample 2021 (N=405)

03. Online shopping habits

Doubts and concerns



03 Online shopping habits

4 Knowledge and concerns

1 Protection of personal data during shopping is the number one concern of shoppers.

2 During the COVID pandemic **worries** about **product quality** and **delivery** have risen.

3 Not being sure about the **origin of webshops** is not a major concern. But **older shoppers** (50+) are relatively more concerned and afraid of scams.



03 Online shopping habits

4 Concerns

In the past years, undamaged delivery became the number one concern.

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



Q1.10 What worries you most when shopping online?
Base: total samples 2017 (N=522) 2018 (N=415) 2019 (N=416) 2020 (N=418) 2021 (N=405)

03 Online shopping habits

4 Concerns

Protection of personal data is a big concern to online shoppers. Is even more mentioned as a concern than product or delivery concerns.

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

2021

1. Protection of my data*
2. Undamaged delivery
3. Product quality
4. Warranty
5. Will it arrive at all

*New item in 2021

Back in top 5 of concerns
after two years of absence



Q1.10 What worries you most when shopping online?

Base: total samples 2017 (N=522) 2018 (N=415) 2019 (N=416) 2020 (N=418) 2021 (N=405)

03 Online shopping habits

4 Concerns – full table

In 2021 concerns about product quality and delivery have risen

- There is even a significant **increase** in worries about **whether the product will be delivered at all**.
- A possible explanation is that more people were ‘forced’ to buy online during the COVID pandemic. Therefore, people who did not have **much experience in online shopping** in the past, might be **more worried**.
 - We see **higher** levels of **concern** among **younger** age groups and **older** age groups:
 - Where younger age groups are relatively more concerned about the **product** (warranty, whether it will arrive undamaged, quality) **& payment**
 - And where older age groups are relatively more concerned about **privacy, origin** of the webshop, point of contact for **customer service**

Column %	2018	2019	2020	2021	Δ '21 vs '20
Column n	415	416	418	405	
Protection of my data (personal data, bank data, ...)	-	-	-	54%	n.a.
Whether the product will arrive undamaged	51%	46%	45%	50%	+5
The quality of the product	52%	41%	44%	49%	+5
The product warranty	49%	41%	44%	48%	+3
Whether the product will be delivered at all	50%	38%	38%	45%↑	+7
My privacy	42%	40%	43%	44%	+1
Where I can raise my complaints	48%	41%	44%	42%	-2
Hidden costs regarding delivery	44%	38%	43%	41%	-2
Unclear contact info	47%	35%	40%	40%	=
The origin of the webshop	39%	33%	40%	39%	-1
Whether I have bought the right product	38%	35%	37%	38%	-1
The payment	37%	28%	28%	32%	+4

↑ Significantly higher/lower
↓ compared to 2020 (c.i. 95%)



03 4

Online shopping habits

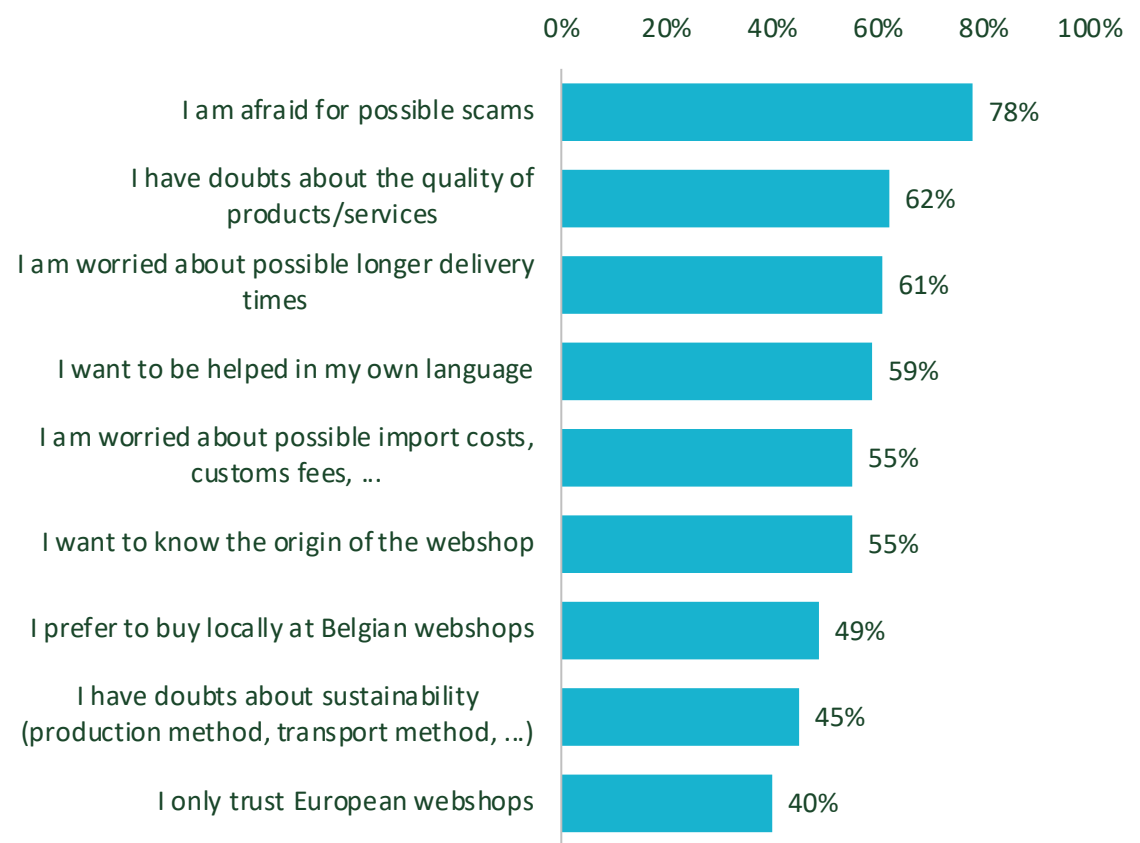
Reasons for concern about the origin of the webshop

38% has concerns about the origin of the webshop.
More mentioned by 50+ as a concern (46%).

Reasons for this are mainly driven by the fear of being scammed. Secondly doubts about product quality and possible delay in delivery times are mentioned.



Where do your concerns about the origin of the web shop come from?



Q1.10a Where do your doubts and concerns about the origin of the webshop come from? (Top 2)
Base: people with worries about the origin 2021 (N=158)

04. The ideal webshop



04 Ideal webshop

General observation

Interesting trend: online shoppers indicate fewer features that discern good from bad webshops

Maybe a lot of these features are becoming a general expectation (a commodity)? As a consequence, it will be harder for webshops to step out of the crowd, to be different.

Ideal webshop Importance

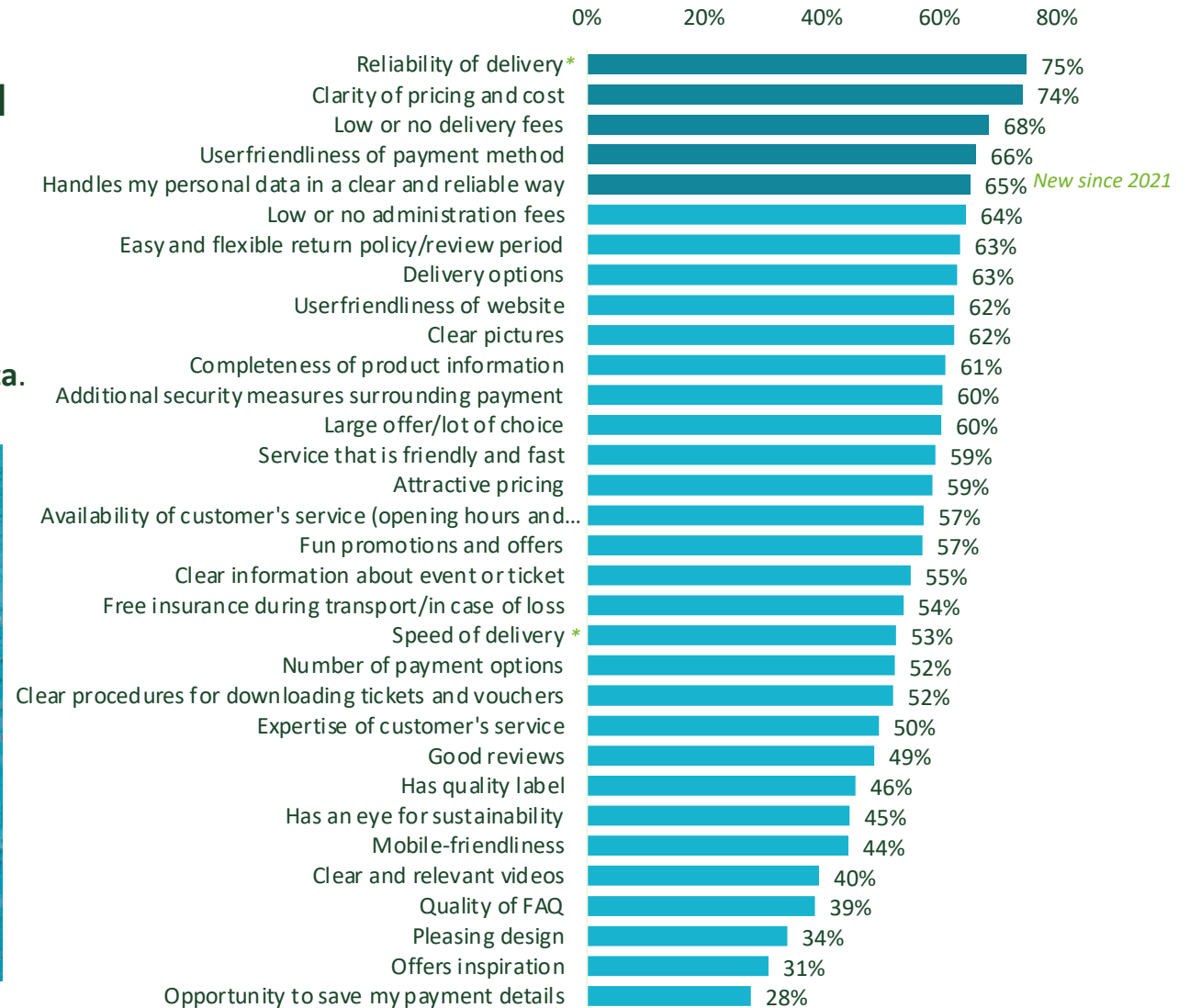
Reliability of delivery, transparency about costs and treatment of personal data, low delivery fees and user-friendly payment are the most important characteristics that discern good from bad webshops in shoppers' minds.

- Transparency is important for both costs and personal data.
- Reliability of the delivery is more important than speed.



Q3.1 Which of the following elements are important to you when discerning between good and bad webshops? Top 2 (important to very important)
Base: Total sample 2021 (N=405)

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



*Item has been split since 2021 into reliability on the one hand and speed of delivery on the other

Ideal webshop

Importance – vs. 2020



In 2021 these aspects became relatively more important:

- Easy and flexible **return policy** or review period
- Availability and expertise of **customer service**
- Free insurance during **transport** (in case of loss)

All of these aspects are at play at the end of the customer journey



In 2021 these aspects became relatively less important:

- Clear **pictures**
- **Large offer/** lot of choice
- Attractive **pricing**
- Delivery **options**
- Fun **promotions** and offers
- **Saving payment details** for future use

All of these aspects are at play when choosing the product



Q3.1 Which of the following elements are important to you when discerning between good and bad webshops? Top 2 (important to very important)
Base: Total sample 2020 (N=418) and 2020 (N=405)

04 The ideal webshop

1 Important elements

1

Most important elements when thinking about the **ideal webshop** are about:

1. Reliability of **delivery**
2. **Transparency** in prices and cost
3. Low **delivery costs**
4. User-friendly **payment method**
5. Respect for **privacy and data protection**

2

Elements which are at the **end of the online shopping journey** (such as transport, return and contact with customer service) have become relatively **more important**. An indication that the online shopper expects an **optimal experience throughout the whole journey**.



04 The ideal webshop

2 Building blocks for the ideal webshop

The **ideal webshop** is made up out of following **building blocks** :



Delivery

- Free delivery
- Home delivery
- Track & trace function



Website characteristics

- Competitive pricing
- Qualitative product descriptions
- Qualitative pictures



Customer care

- Fast response time
- Reachable via email
- Capable staff



Security, transparency and trust

- Confidentiality of data
- Protection against hacking
- Clear warranty policy
- No unwanted advertising



Payment and terms

- Free returns
- Order confirmation
- Transparency of supplementary costs
- Multiple payment options



Ideal webshop Delivery

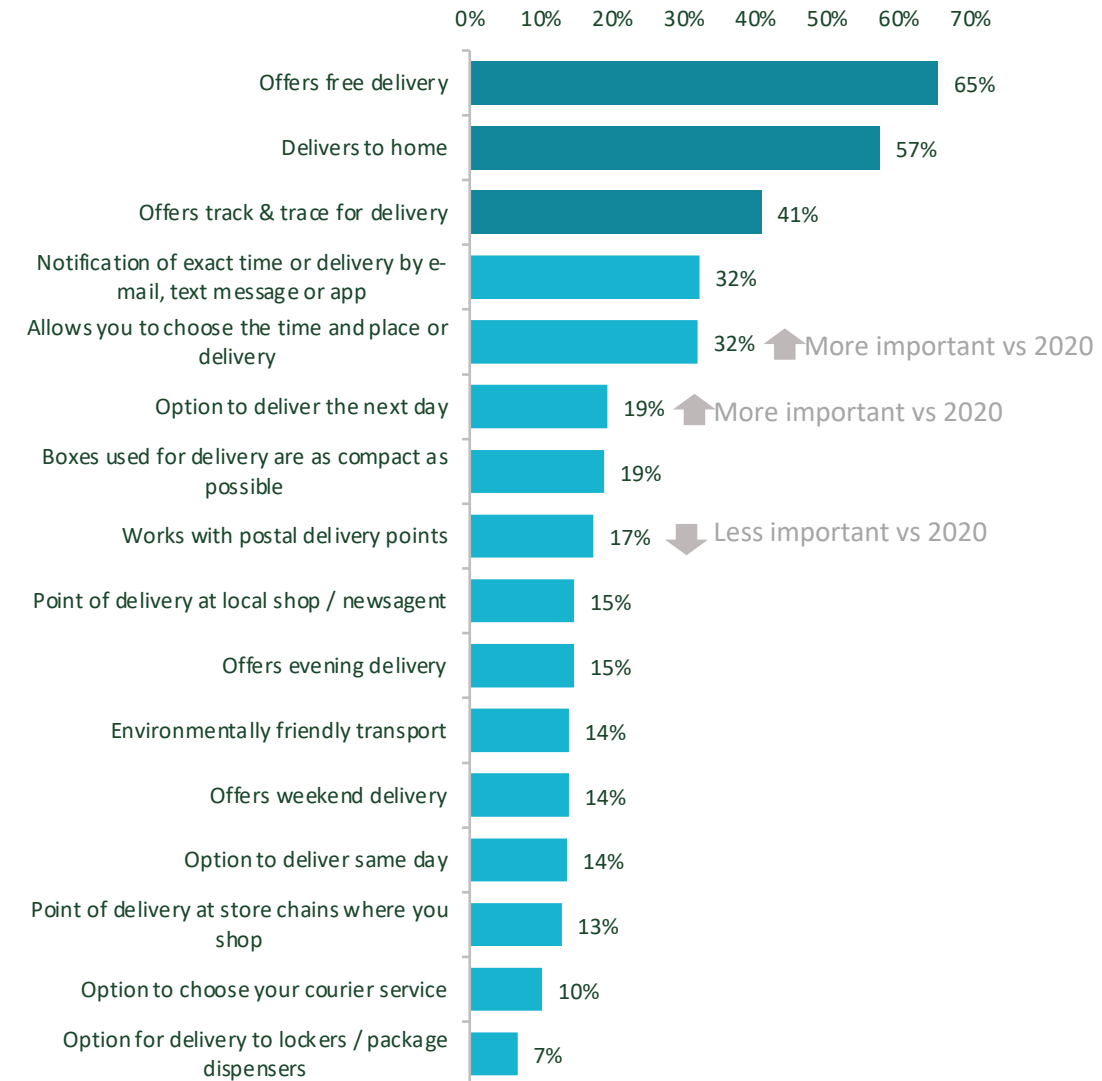
Free delivery, home delivery and track & trace function are still the most important delivery preferences.

- In comparison with 2020 choosing time and place of delivery and the option to **deliver next day** became relatively **more important** in 2021.
- In comparison with 2020 **postal delivery points** became relatively **less important** in 2021. *This might be because of more at home presence due the COVID measures.*



Q3.2 Which of these are the building blocks for the ideal webshop, in your opinion? Pick 5.
Base: total samples 2017 (N=522), 2018 (N=415), 2019 (N=416), 2020 (N=418) and 2021 (N=405)

Which of these are the building blocks for the ideal webshop, in your opinion?
When it comes to delivery:



04 Ideal webshop

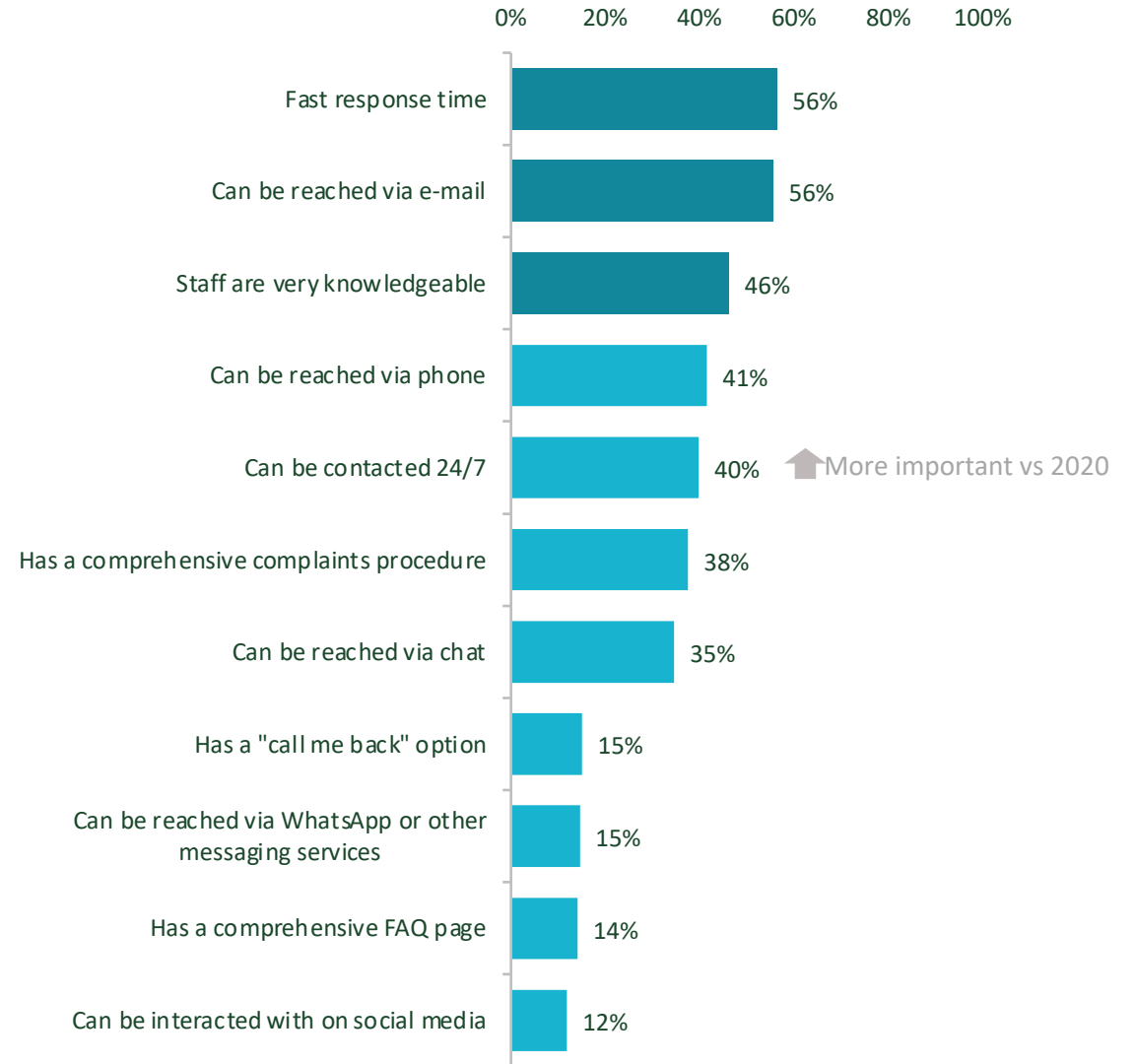
2 Customer care

Fast response time, reachable via email and capable staff remain the most important customer care building blocks.

- **24/7 availability** became relatively more important in 2021 in comparison with 2020.



*Which of these are the building blocks for the ideal webshop, in your opinion?
When it comes to customer care:*



Q3.2 Which of these are the building blocks for the ideal webshop, in your opinion? Pick 5.
Base: total samples 2017 (N=522), 2018 (N=415), 2019 (N=416), 2020 (N=418) and 2021 (N=405)



04 2

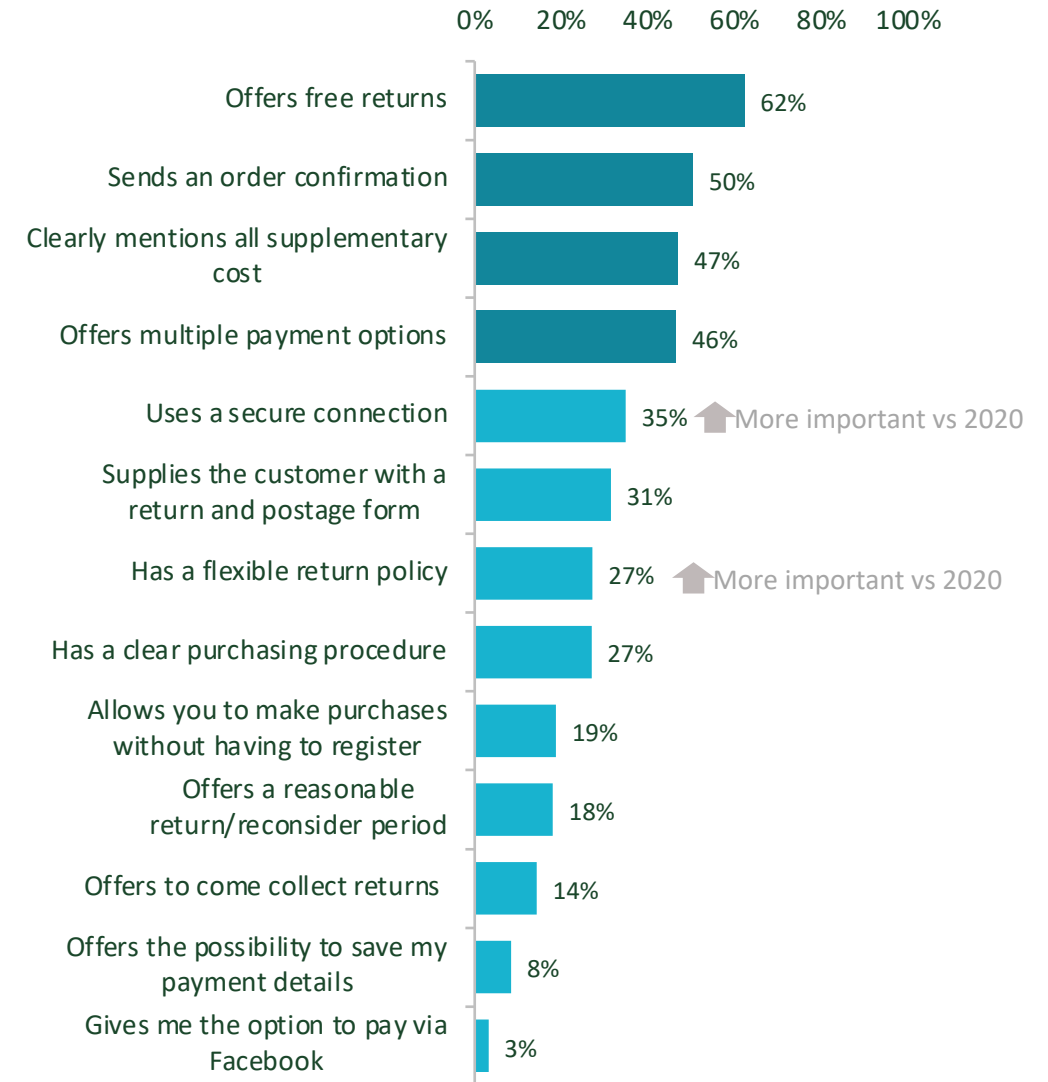
Ideal webshop Payment & Terms

Most important preferences linked to payment and terms are free returns, order confirmation, transparency of supplementary costs and multiple payment options.

- A secure connection and a flexible return policy became relatively more important in 2021.
 - *The importance of a flexible return policy might be something that became more important when brick shops had to close because of COVID.*



*Which of these are the building blocks for the ideal webshop, in your opinion?
When it comes to payment and terms:*



Q3.2 Which of these are the building blocks for the ideal webshop, in your opinion? Pick 5.
Base: total samples 2017 (N=522), 2018 (N=415), 2019 (N=416), 2020 (N=418) and 2021 (N=405)



04 Ideal webshop

2 Webshop characteristics

Competitive pricing and the need for qualitative product descriptions and pictures are the most important website characteristics.

- Declining trend in the need for product descriptions and pictures remains in 2021.
- A wide offer of products and an efficient search function became relatively more important in 2021.



Which of these are the building blocks for the ideal webshop, in your opinion?
When it comes to characteristics of the webshop:



Q3.2 Which of these are the building blocks for the ideal webshop, in your opinion? Pick 5.
 Base: total samples 2017 (N=522), 2018 (N=415), 2019 (N=416), 2020 (N=418) and 2021 (N=405)

04 Ideal webshop

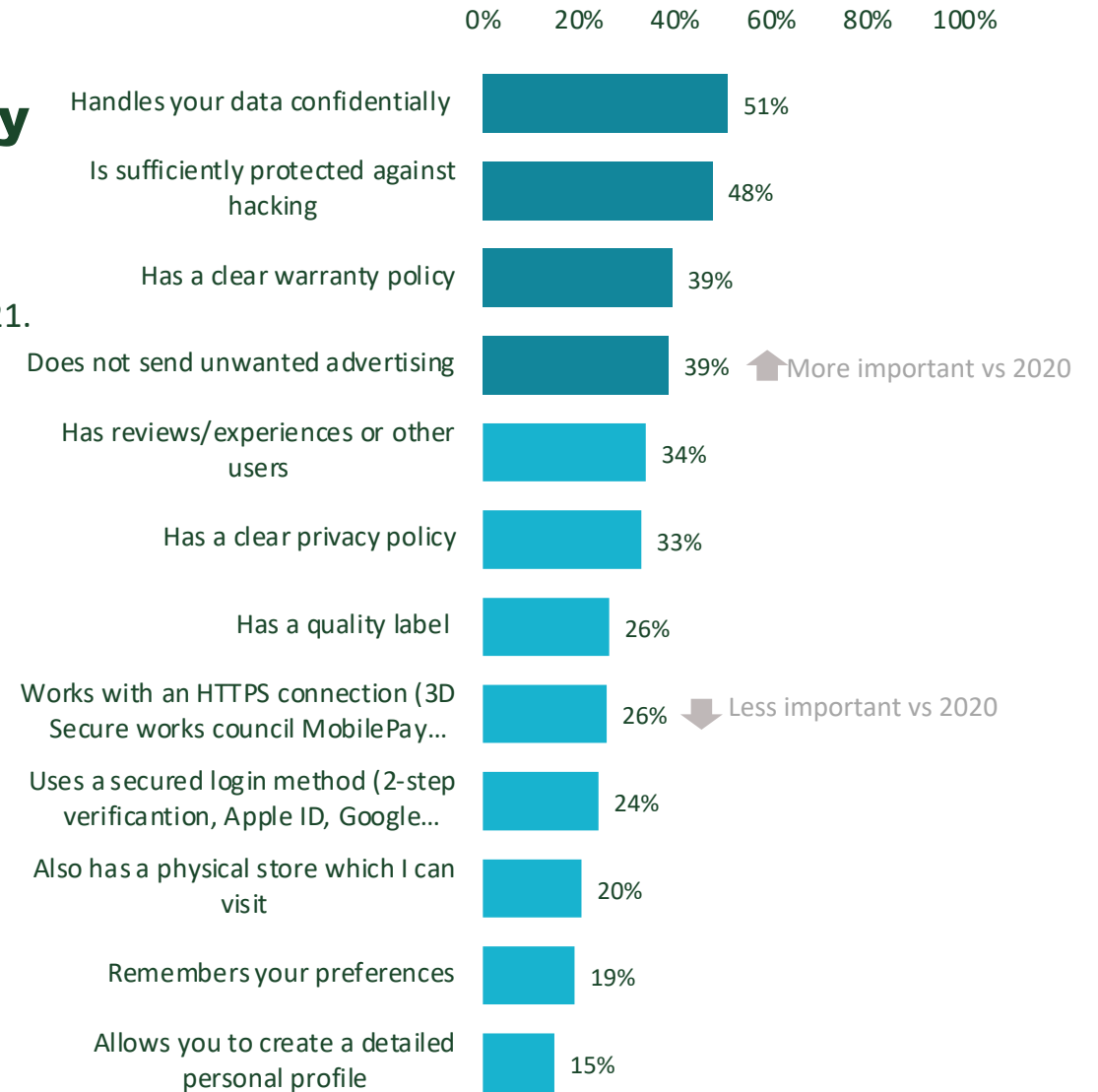
2 Security, transparency and trust

Confidentiality of data, protection against hacking, clear warranty policy and no unwanted advertising are the most important building blocks.

- No unwanted advertising became relatively more important in 2021.



Which of these are the building blocks for the ideal webshop, in your opinion?
 When it comes to security, transparency and trust:



Q3.2 Which of these are the building blocks for the ideal webshop, in your opinion? Pick 5.
 Base: total samples 2017 (N=522), 2018 (N=415), 2019 (N=416), 2020 (N=418) and 2021 (N=405)



05. Segmentation

Different motivations toward online shopping



05 Segmentation 1 Influence COVID

1 Overall, during the **COVID pandemic** some people clearly missed the **experience** and **social contacts** of **real-life shopping**.

2 There is a **polarization** in **how** people **responded** to the **need of more online shopping** during the pandemic: both **Inspiration Shoppers**, who enjoy the online shopping experience, and **Careful Shoppers**, who prefer physical stores, have **increased**.

3 So, on the one hand there are people who have **learned to enjoy online shopping**, while on the other hand a group of shoppers definitely **missed the experience of a physical store**. These shoppers tend to have **lower intention for online buying** in the coming year.

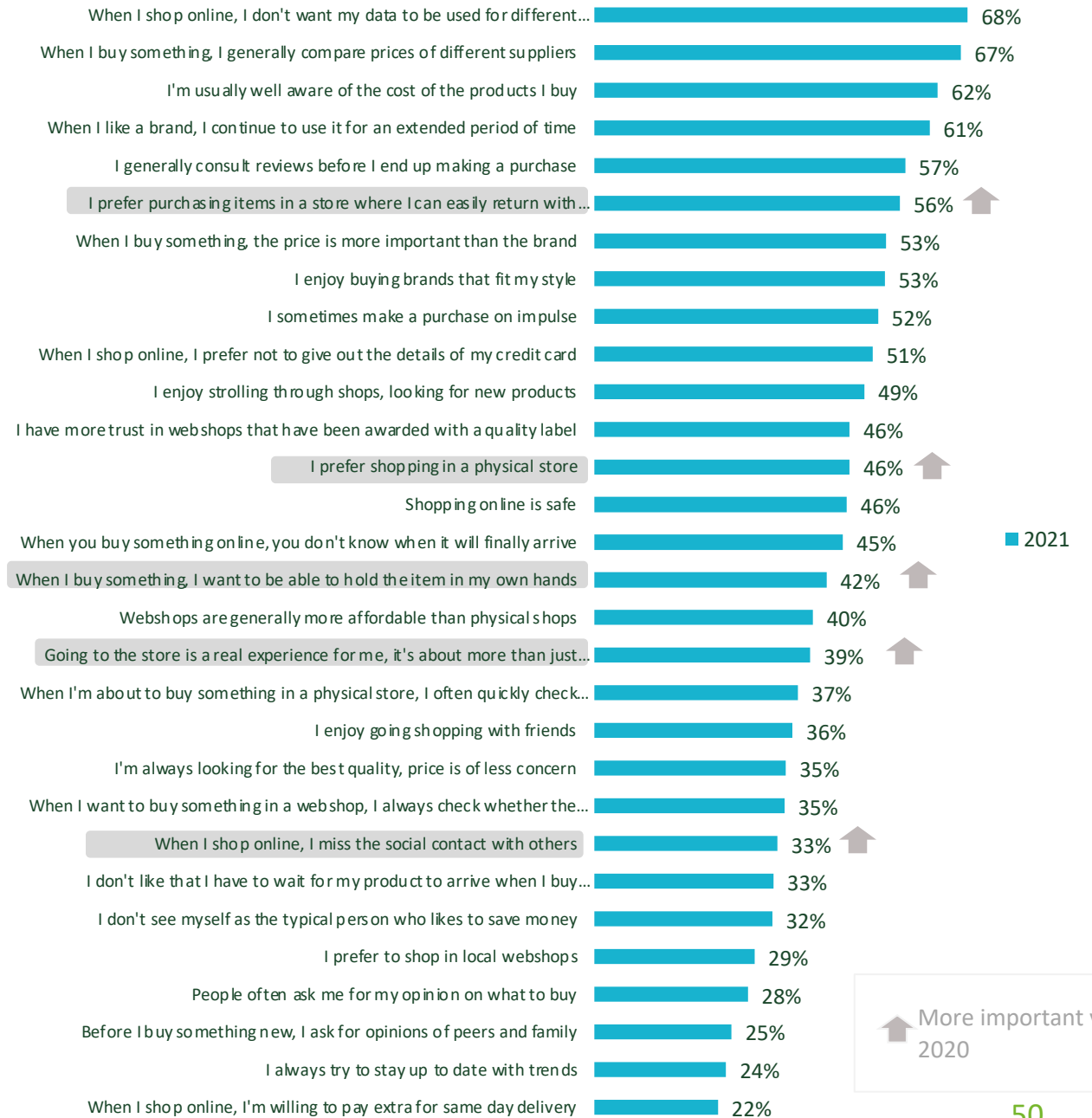


Segmentation General shopping attitudes

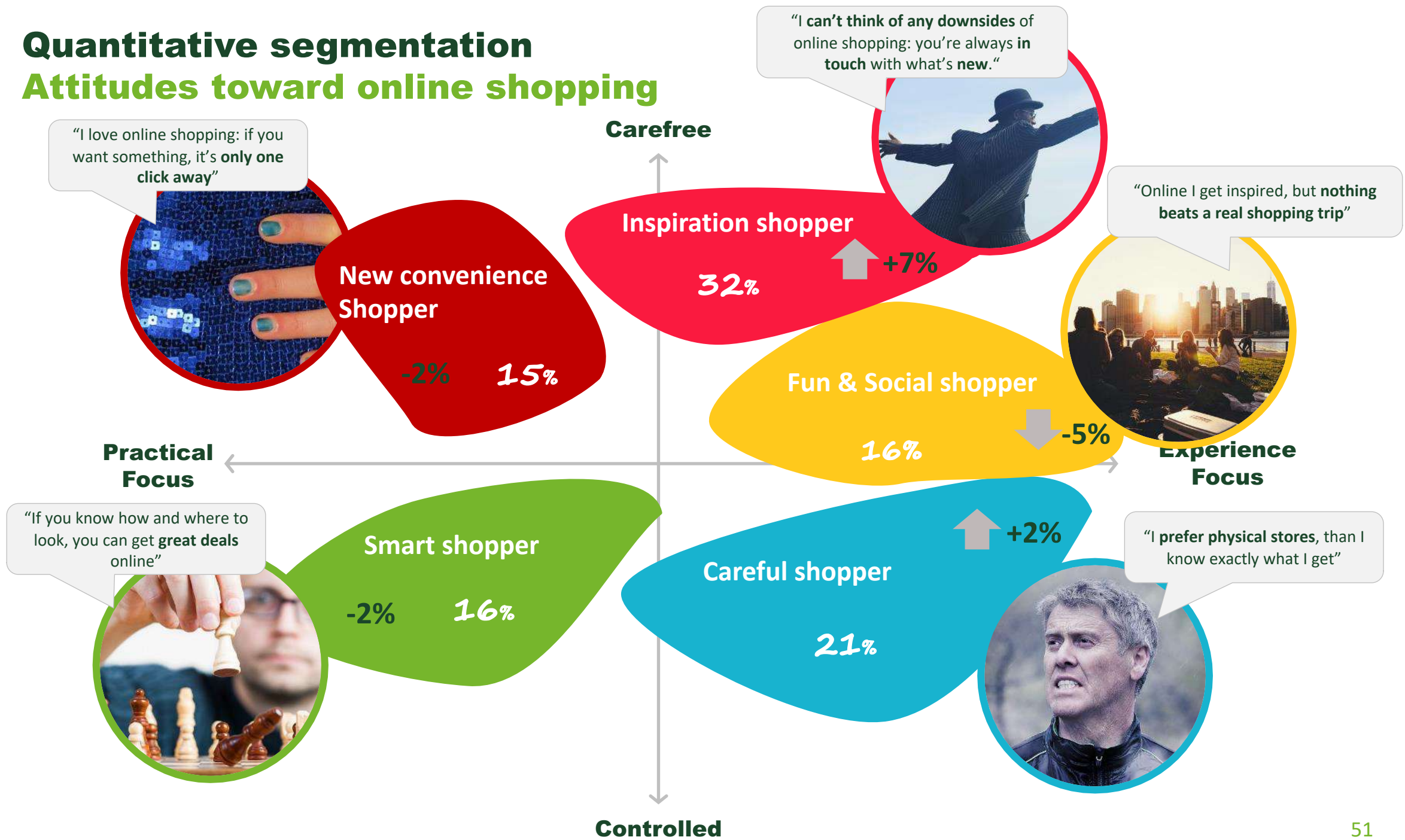
During the COVID pandemic people have realised the importance of the physical experience and social contacts during real life shopping.



Q2.1. To which extent do you agree with the following statements?
5-point scale (top 2: (totally) agree)
Base: total samples 2017 (N=522), 2018 (N=415) and 2019 (N=416)



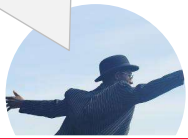
05 1 Quantitative segmentation Attitudes toward online shopping



05 1

Segmentation Differentiating attitudes towards online shopping

"I can't think of any downsides of online shopping: you're always in touch with what's new."



"Online I get inspired, but nothing beats a real shopping trip"



"I prefer physical stores, than I know exactly what I get"



"If you know how and where to look, you can get great deals online"



"I love online shopping: if you want something, it's only one click away"



Inspiration shopper
32%

Fun & social shopper
16%

Careful shopper
21%

Smart shopper
16%

New convenience shopper
15%

Frequency online shopping

Advantages of online shopping:

A good webshop is/has:

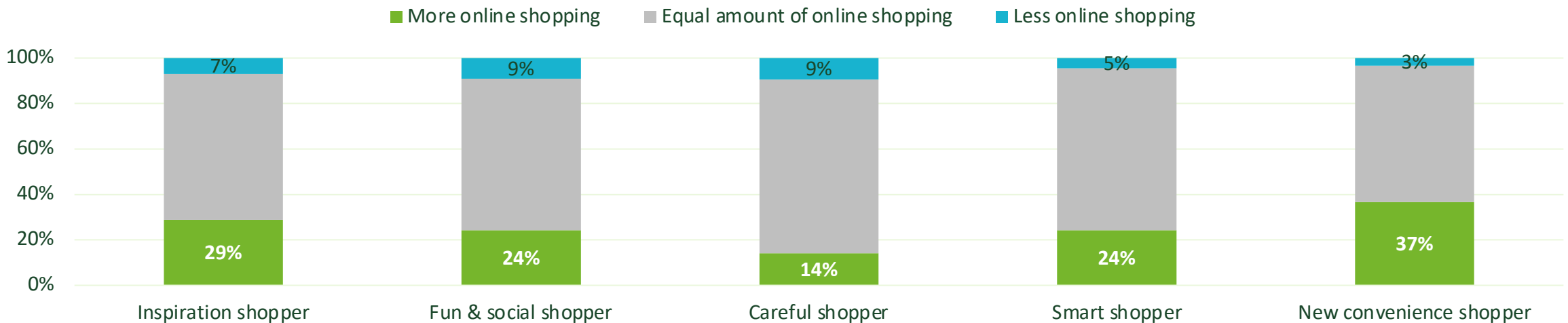
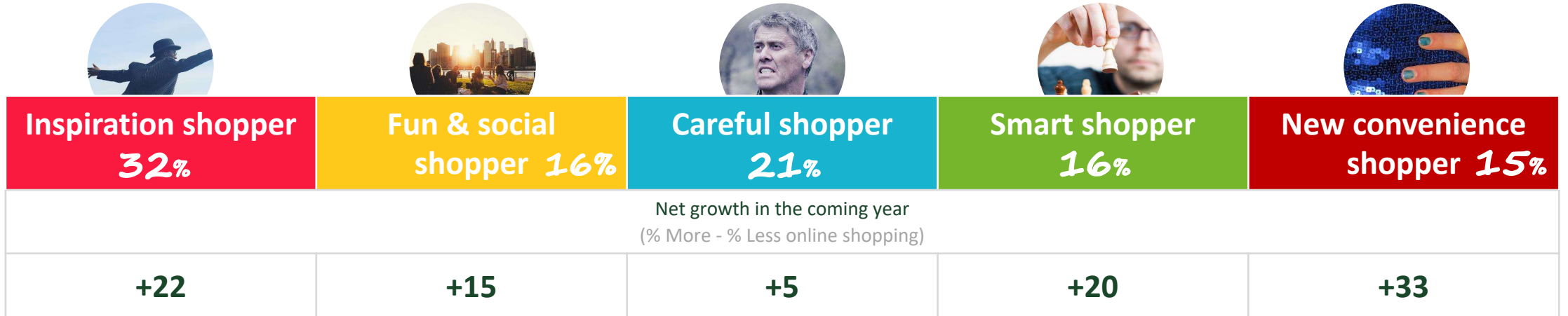
High (weekly +: 37%)	Medium (weekly +: 29%)	Low (weekly +: 15%)	Medium (weekly +: 32%)	High (weekly +: 37%)
Stay on top of the trends Sharing via social media Great way to relax	Inspiration Sharing via social media	Convenience Price comparisons	Reviews Best deals/prices	Immediate gratification Fast Great way to relax
Mobile friendly Inspirational Nice webdesign Fast delivery Easy payment	Inspirational Nice webdesign Good customer service Easy payment	Secure payment Low fees Free insurance (in case of loss during transport) Fast delivery Data protection	Quality label Different payment options	No extra fees Reliable delivery



05 Segmentation

1 Expectations for the coming year

All segments have a positive estimated net growth for the coming year, but this is lower among Careful shoppers.



Q1.14 Do you think your online shopping habits will change over the next year? (SR)

06. Additional questions

Innovations



06 Additional questions

1 Innovations

Again, visual innovations seem to provide the best improvement for an online shopping experience

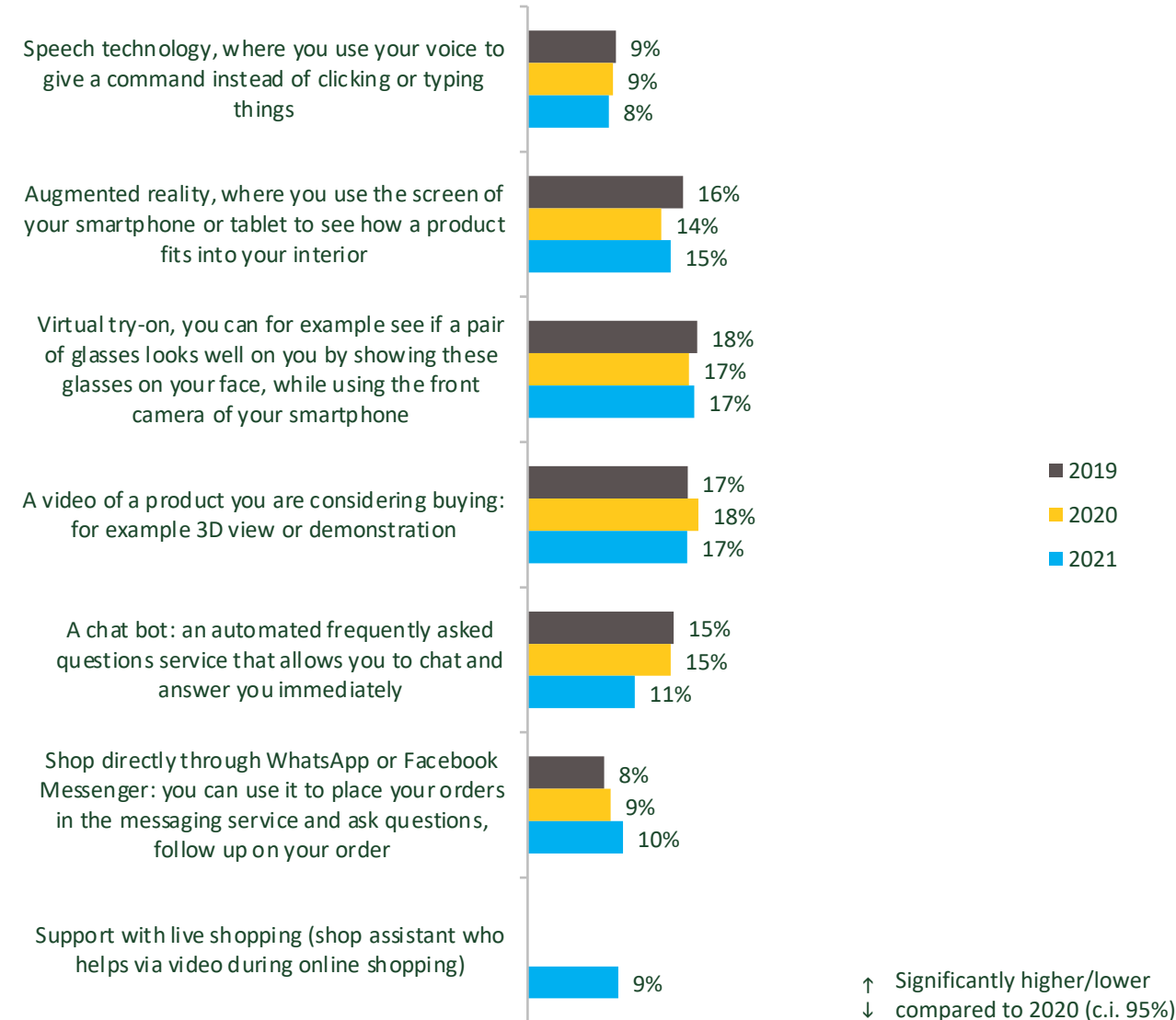
- Just like in 2020 visual innovations, like **virtual try-on**, **product videos** and **augmented reality** evoke relatively more interest among Belgians.
- Overall, the added value of these innovations are **more often acknowledged by younger people** (25-30 years) than older people (50+ years).



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

Base: total sample 2020 (N=418) 2021 (N=405)

To what extent do you think each of these innovations would improve your shopping experience?
(% huge improvement)



06 Additional questions

3 Online marketplaces

Half of the people would choose to buy at a marketplace, the other half at the brand webshop

More preference for brand webshops among 50+



What would you choose?



Profile of shoppers who prefer market places:

- Relatively less 50+
- Relatively more Smart shoppers & New convenience shoppers

06 Additional questions

3 Online marketplaces

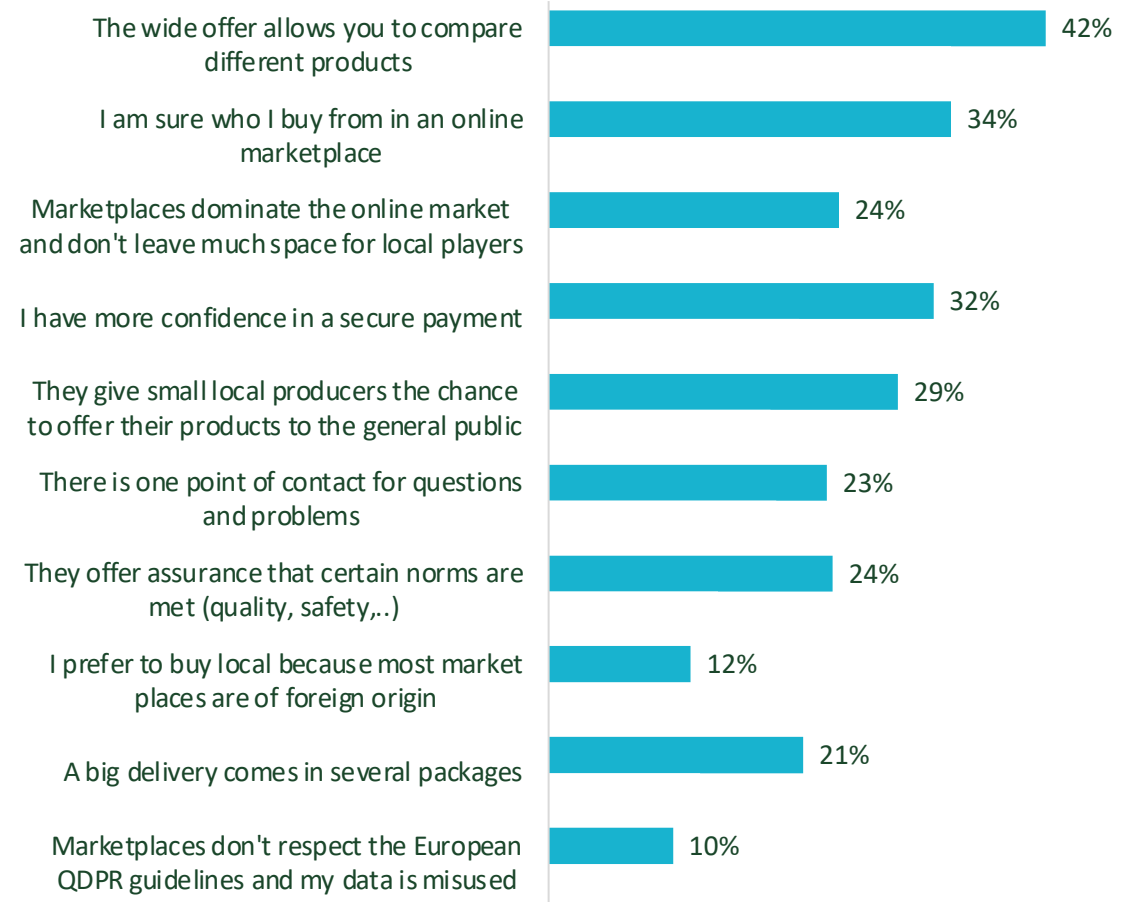
Those who prefer marketplaces:

- See the advantage of easily comparing different products
- Are reassured by secure payment, quality norms,...
- Think that small local producers are given chances on this platform



Attitudes towards online marketplaces % Agree

■ Prefer buying at an online marketplace



Q3.4a4. Which statements about online marketplaces do you agree with?
Base: total sample 2021 (N=405)



06 Additional questions

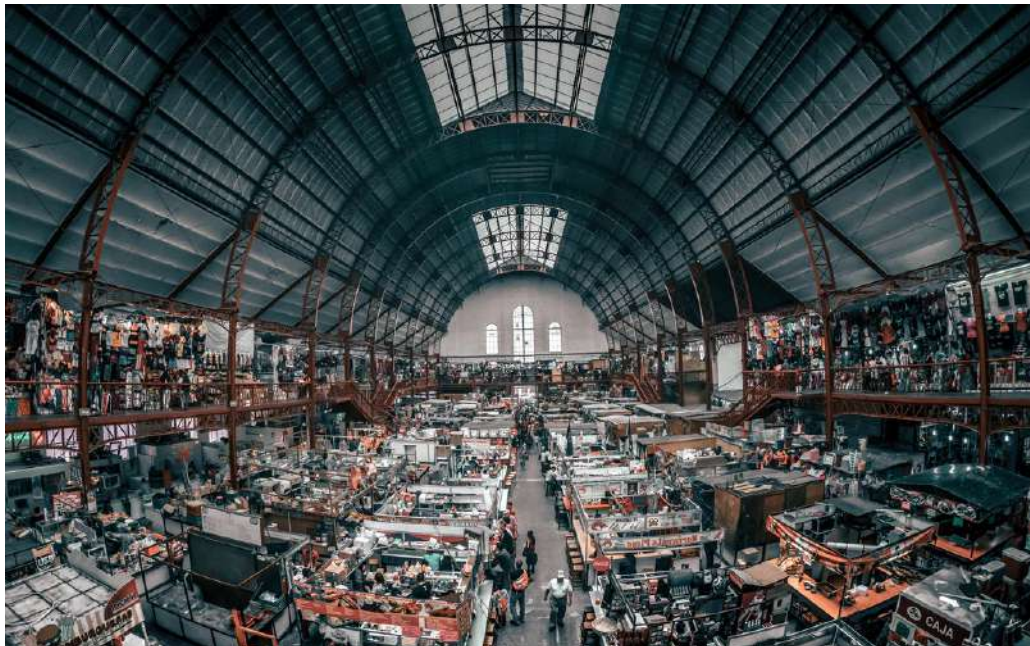
3 Online marketplaces

Those who prefer marketplaces:

- See the advantage of easily comparing different products
- Are reassured by secure payment, quality norms,...
- Think that small local producers are given chances on this platform

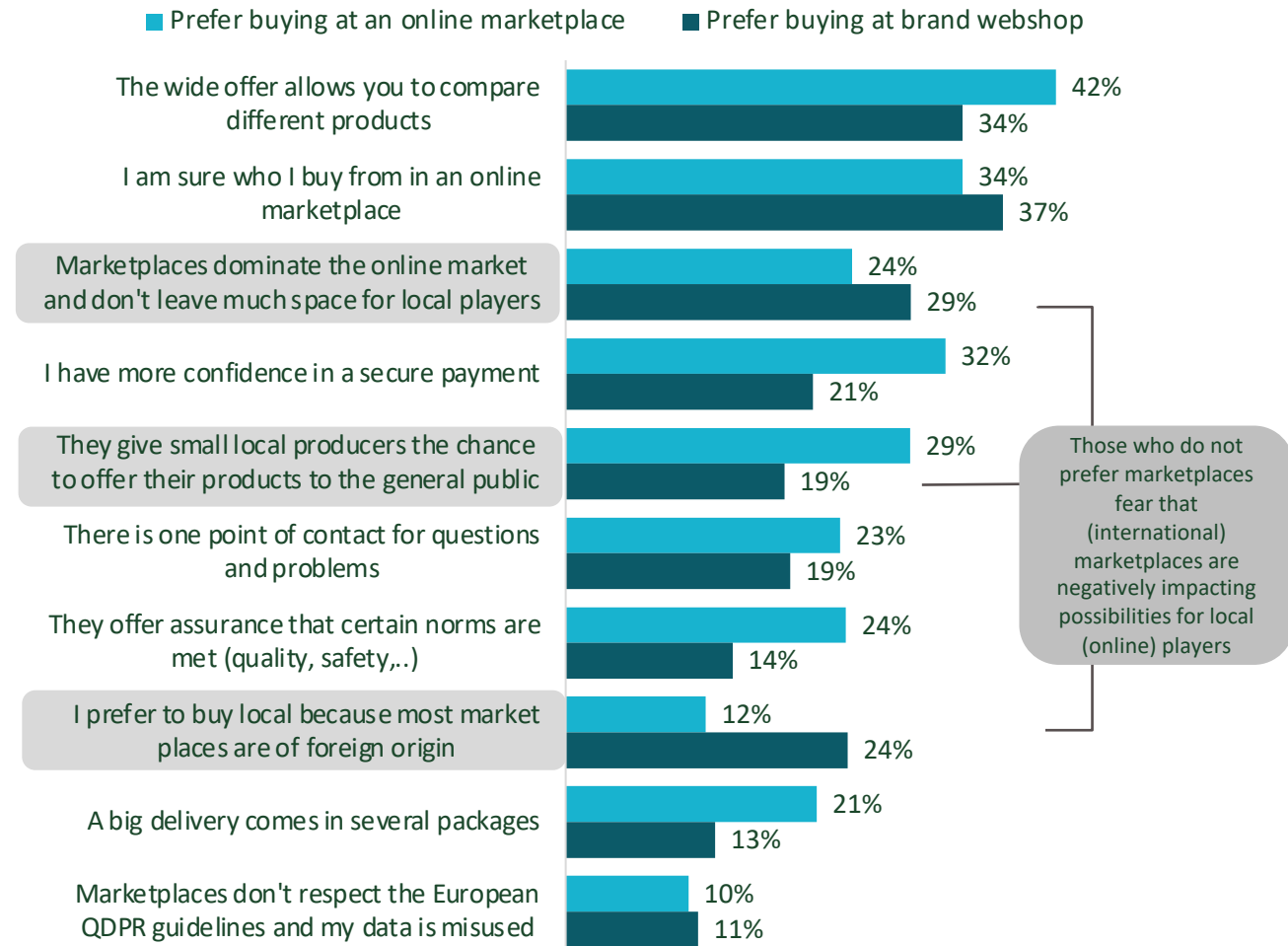
Those who do not prefer marketplaces:

- See these (international) players negatively impacting local webshops



Attitudes towards online marketplaces

% Agree



Q3.4a4. Which statements about online marketplaces do you agree with?
Base: total sample 2021 (N=405)



06 Additional questions

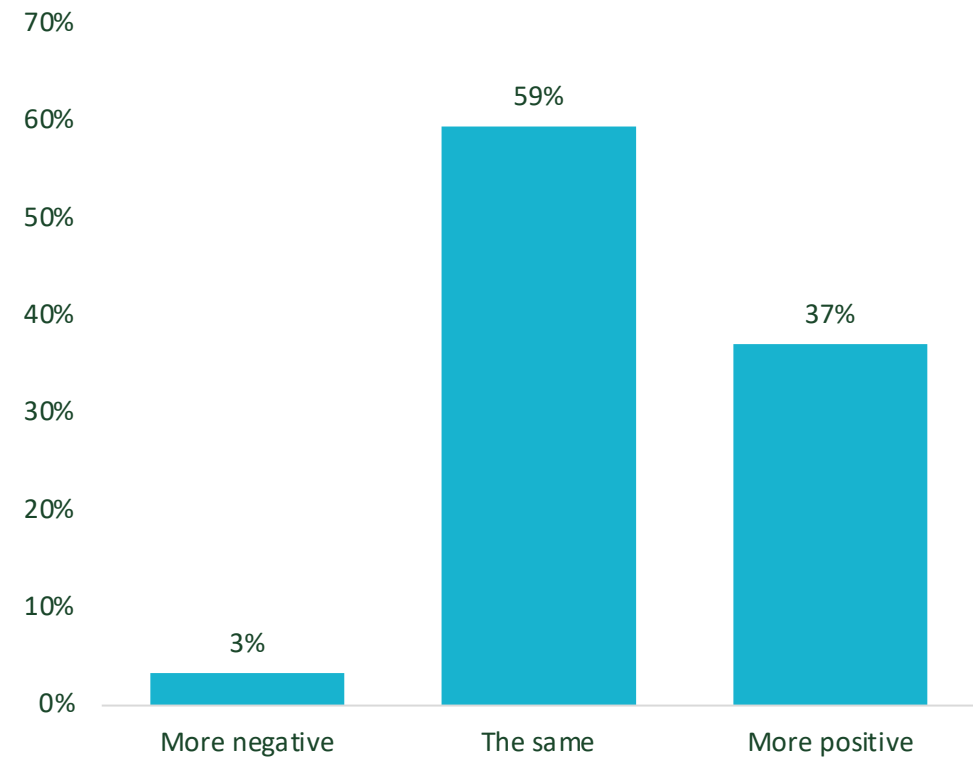
3 C2C marketplaces

Most people's opinion would stay the same if they would know the identity of the buyers and sellers.

- But 37% would feel more positive about C2C platforms



If you would know the identity of the sellers and buyers on C2C platforms, would this change your opinion?



Q3.4b2. If you would know the identity of the sellers and buyers on second-hand platforms, would this change your opinion?
Base: total sample 2020 (N=405)

06. Additional questions

Sustainability



06 Sustainability

4

1

45% thinks a **good webshop** should have **eye for sustainability**. Sustainability in the context of webshops is still mainly focused on **packaging**: environmentally friendly packaging material & efficient packaging are mentioned first.

2

3 in 4 cannot spontaneously name any sustainable webshop.

3

An estimation of **12%** would be willing to **pay more** for **sustainability** when shopping online. But price as well as protection of product quality seem to overrule sustainability in trade-off situations. People are only **willing to give in on delivery time** when it comes to sustainability.



Sustainability Overview

Importance

-  45% thinks a good webshop should have **eye for sustainability**
-  14% believes an ideal webshop should have **environmentally friendly transport**
-  18% has **doubts about sustainability** when buying at a **webshop** from **another origin**
-  29% prefers to shop at a **local webshop**

A sustainable webshop should ...



- Work with **sustainable and environmentally friendly packaging**
- Ensure the **recycling** of old products
- Work with **efficient packaging**

Willingness consumers

12% would pay more for sustainable products



A **lower price** is preferred over **sustainable production** and sustainable **delivery methods**.



Protection of the products is preferred over products with **less packaging**.



Sustainable delivery methods are preferred over **fast delivery times**.



There is a **50-50 distribution** when people have to choose between a **wide international offer** and a **smaller local offer**.

Sustainability ranking

TOP 3 webshops

1. Bol.com (26%)
2. Zalando (17%)
3. Amazon (15%)

75% could not name a sustainable webshop

TOP 3 deliverers

1. Bpost (53%)
2. Postnl (29%)
3. DHL (17%)

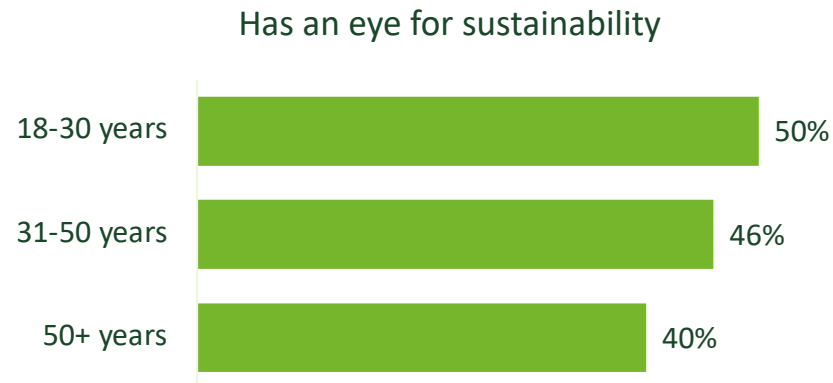
35% said none of the deliverers is sustainable

06 Additional questions

4 Sustainability

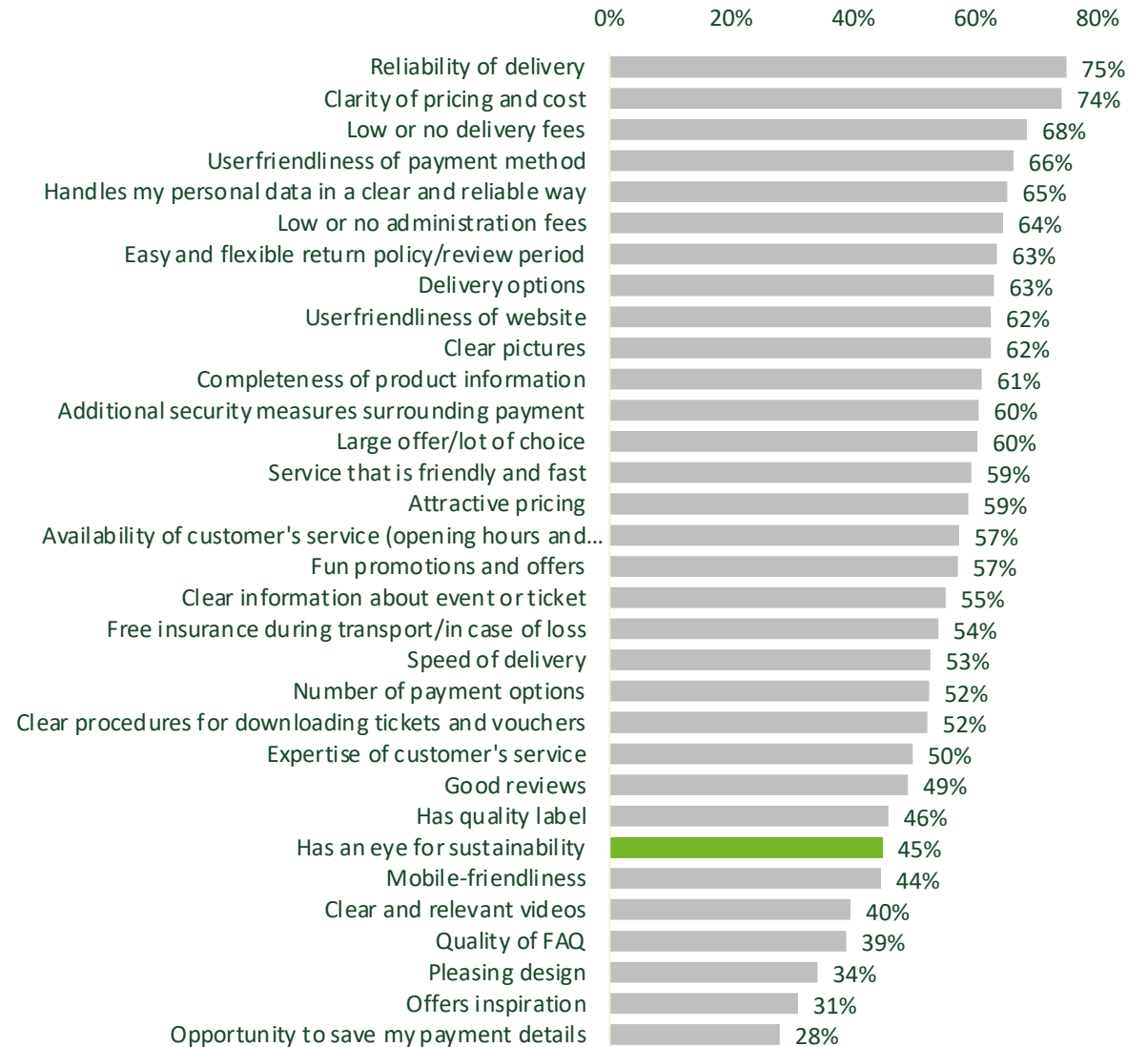
Sustainability is not a main differentiator when discerning 'good' from 'bad' webshops

- Relatively more important among -30 year olds



Q3.1 Which of the following elements are important to you when discerning between good and bad webshops? Top 2 (important to very important)
Base: Total sample 2021 (N=405)

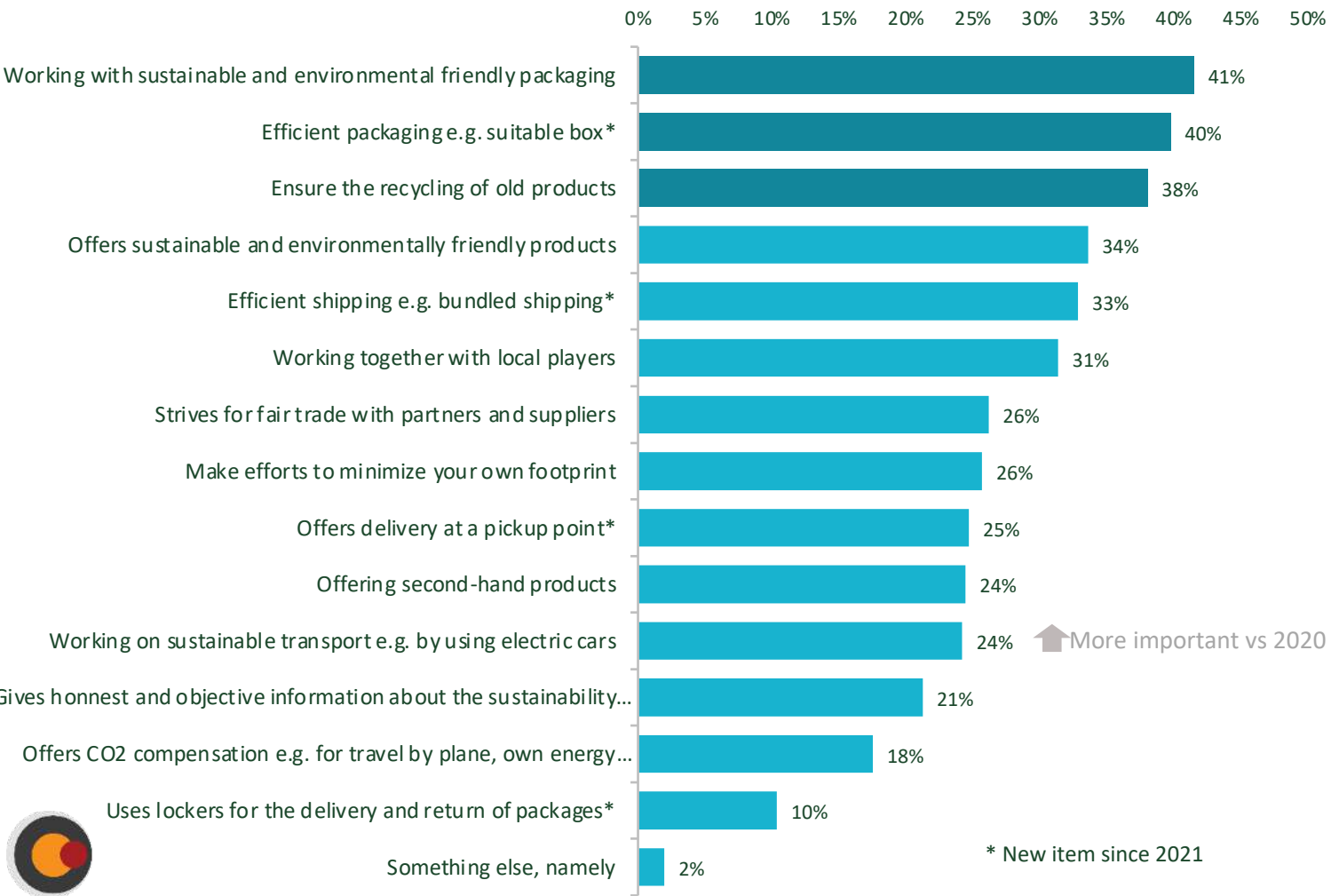
Which of the following elements are important to you when discerning between good and bad webshops?



06 Additional questions

4 Sustainability

What should a web shop focus on to be sustainable?



* New item since 2021

When thinking about a sustainable web shop, packaging remains the most important.

- Sustainable transport became relatively more important in 2021.



Q3x6. What do you think a web shop should focus on in order to be sustainable? (MR)
 Base: total sample 2020 (N=418) 2021 (N=405)

06 Additional questions

4 Sustainability

“
**Which webshop
comes to mind
when thinking
about
sustainability**
”

75%

Can't name a sustainable web shop

- The 3 most mentioned web shops are
 1. Bol.com (7%)
 2. Zalando (4%)
 3. Amazon (4%)

Q3.5. Which web shop (s) do you think about spontaneously when you hear the concept of sustainability? (open ended with option 'Don't know any')
Base: total sample 2021 (N=405)



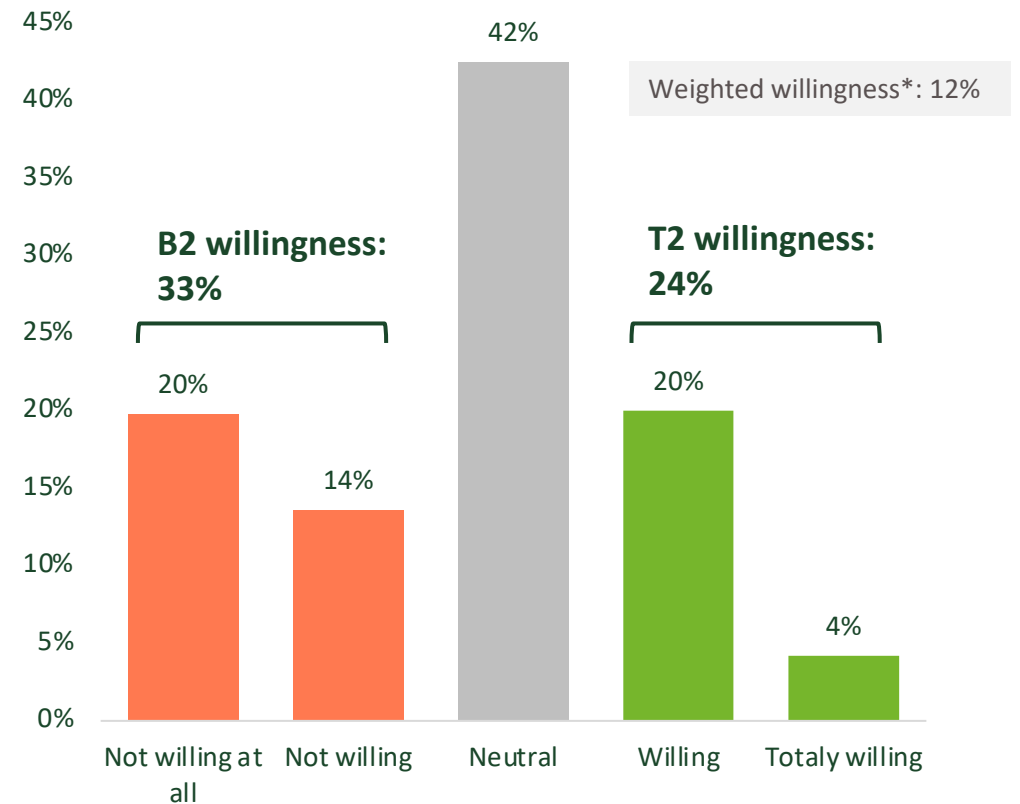
06 4 Additional questions Sustainability

Willingness to pay extra for sustainability is limited

- 24% claims to be willing to pay more sustainable products (but **only 4% is totally willing**)
- **33% is not willing to pay more** for sustainable products.
- **42% has no clear opinion** about paying more for sustainable products.



To what degree are you prepared to pay more for sustainable products?



Weighted willingness*: 80% of totally willing, 20% of willing, 10% of neutral, 5% of not willing 1% of not willing at all

Q3.6a To what degree are you prepared to pay more for sustainable products?
Base: total sample 2020 (N=418) 2021 (N=405)



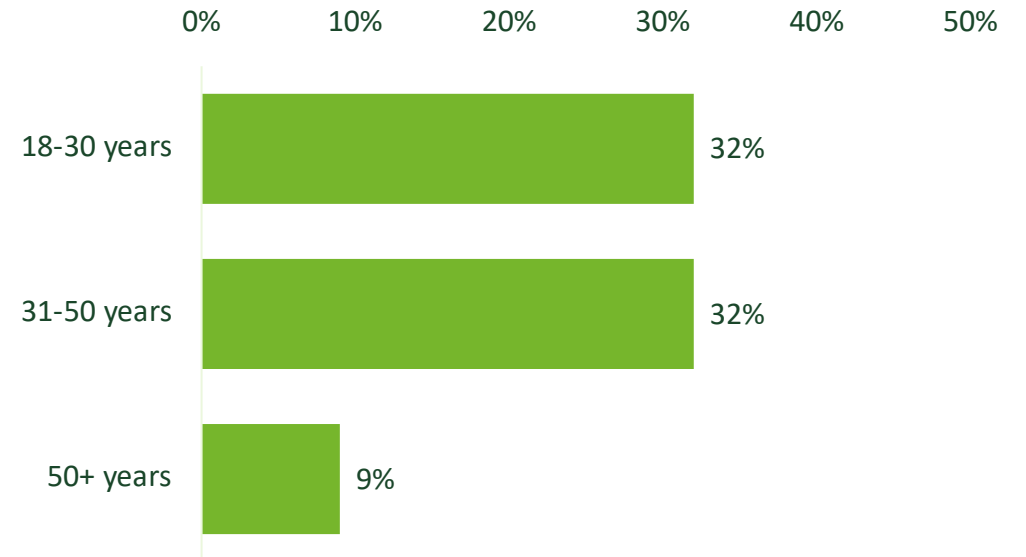
06 Additional questions

4 Sustainability

More stated willingness to pay extra for sustainability among younger generations



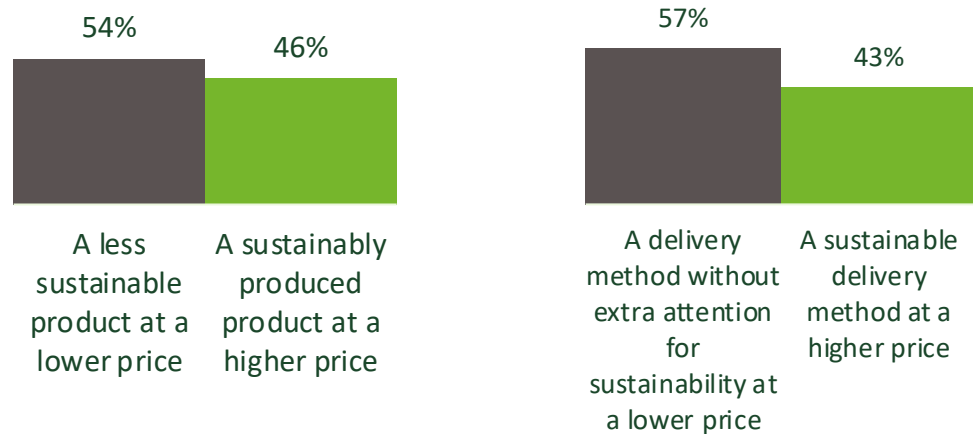
(Totally) willing to pay more for sustainable products



Q3.6a To what degree are you prepared to pay more for sustainable products?
Base: total sample 2020 (N=418) 2021 (N=405)

06 4 Additional questions Sustainability – Trade-offs

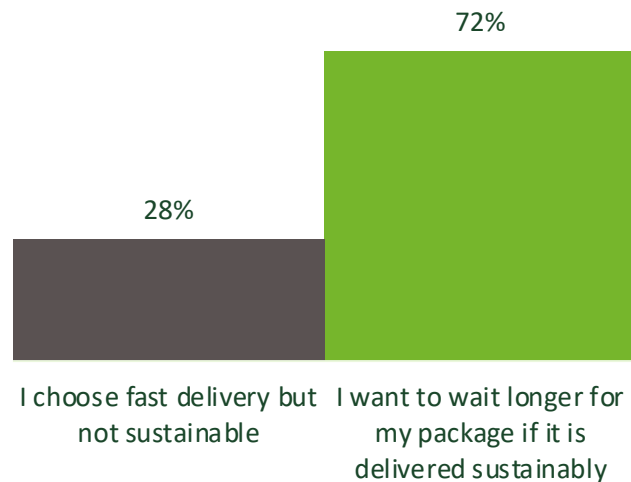
Willingness to pay for sustainable transport is lower than ‘sustainable products’ in general



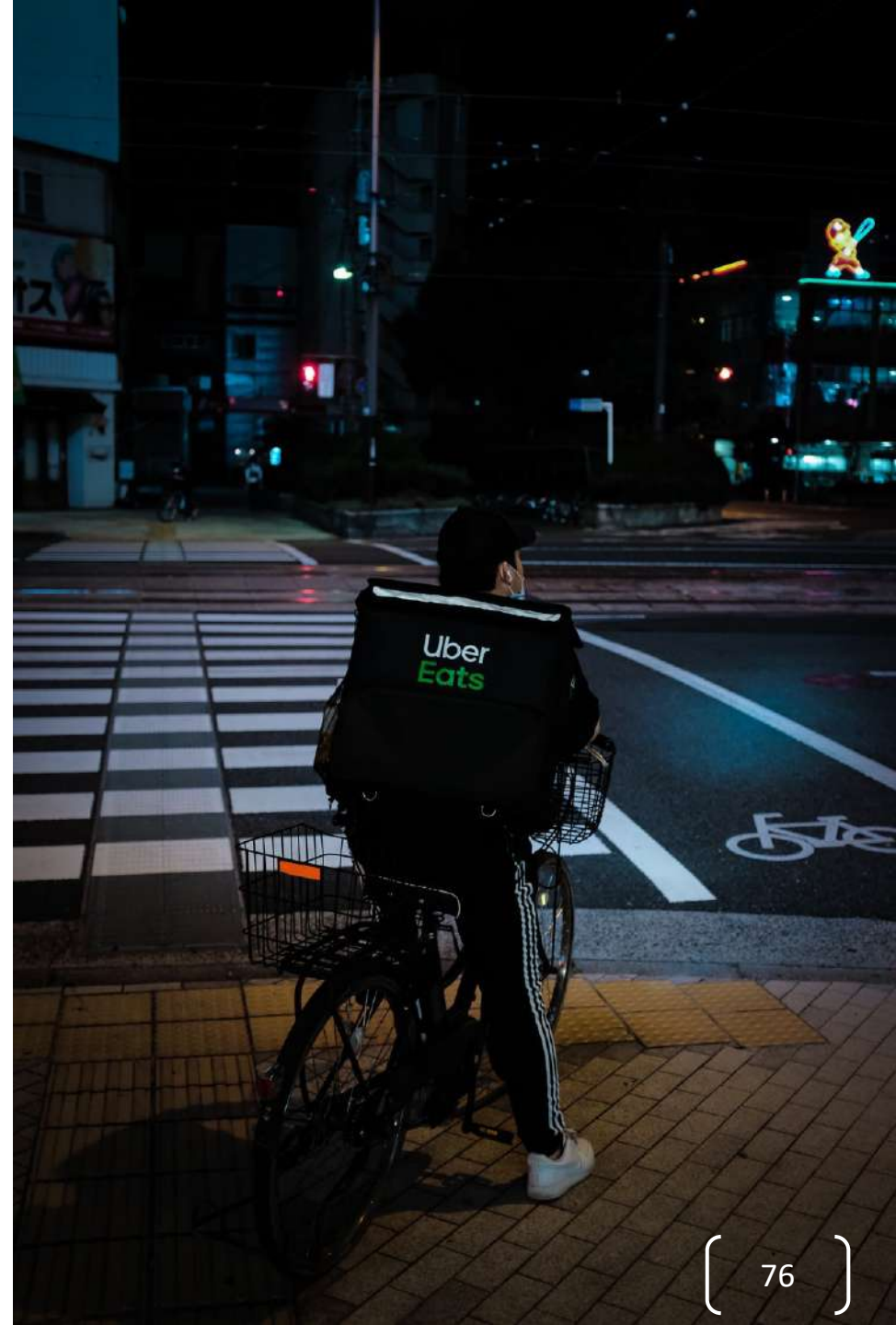
Q3.6d If you had to chose between these option when shopping online, what would you chose?
Base: total sample 2021 (N=405)

06 4 Additional questions Sustainability – Trade-offs

There is quite some willingness to accept longer delivery times under the condition that the delivery method is more sustainable



Lower willingness to wait longer among Inspiration Shoppers and New Convenience Shoppers

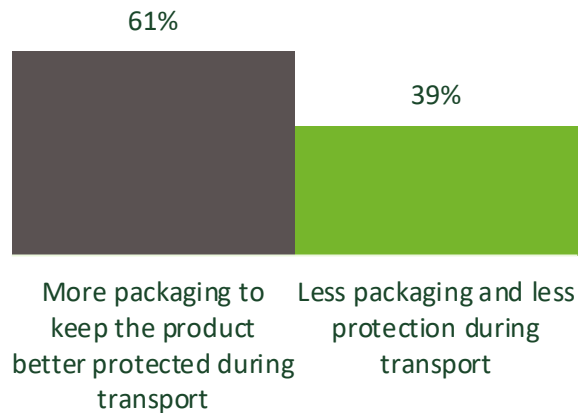


Q3.6d If you had to choose between these options when shopping online, what would you choose?
Base: total sample 2021 (N=405)

06 Additional questions

4 Sustainability – Trade-offs

Less packaging is only accepted when there's no risk of damaging the product during transport



More packaging to keep the product better protected during transport

Less packaging and less protection during transport

Q3.6d If you had to choose between these options when shopping online, what would you choose?
Base: total sample 2021 (N=405)



Thank you,

And let's talk!

