

Country factsheet - April 2016

# Belgium



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## Introduction

Belgium has emerged as an important player in global e-commerce, given its unique position in the heart of Europe. With a diverse population, expanding market and rich culture, Belgium provides an excellent e-tail opportunity for companies all over the world.

A 2015 survey found that 84.7% of Belgium's population had Internet access for a total of 9.5 million users. Of those, 5 million shop online, spending an average €1,234 per person per year<sup>1</sup>. **Belgian consumers typically spent 8% of their budget online in 2013, then 9% in 2014.** That number is forecast to reach 16% by 2020<sup>2</sup>.

The 2015 Global Retail E-Commerce Index from A.T. Kearney ranked Belgium at No. 9 - a remarkable 15-spot jump from the 2014 index and just ahead of Australia and Canada<sup>3</sup>. A connected consumer base, reliable infrastructure and competitive market all influenced the rise – Belgium now has a growth potential of 8%.

One other circumstance that should improve Belgium's e-commerce position may come in the form of a policy change. A new law that arose at the end of 2015 proposed allowing employees to work overnight in any industry, providing a new opportunity to address shipping and fulfillment needs. Before this law, Belgian policy prevented e-tailers from conducting overnight deliveries and delayed fulfillment. However, now those hours are open for business, so e-tailers that wish to provide faster delivery through the night are free to do so.



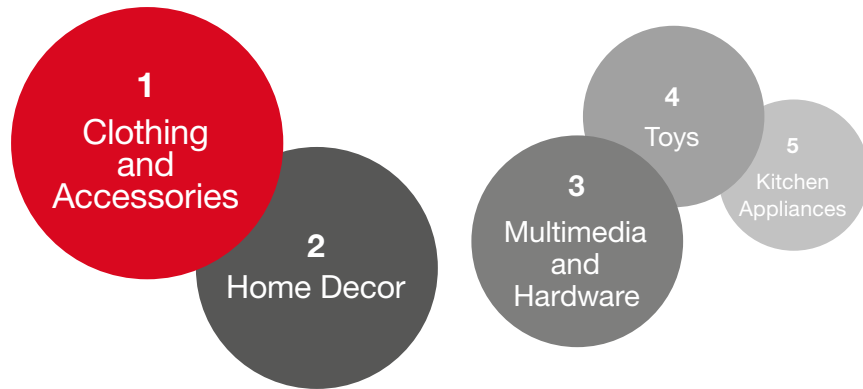
**A new law allowing employees to work overnight, provides a new opportunity to address shipping and fulfillment needs.**

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## What do Belgian e-shoppers buy?

The top categories for Belgian e-commerce purchases<sup>4</sup>

**73%**  
of Belgians  
made an online  
purchase in 2015.



During the second quarter of 2015, 73% of Belgians aged 15 or over made an online purchase, compared to 60% of Belgians during 2014<sup>5</sup>.

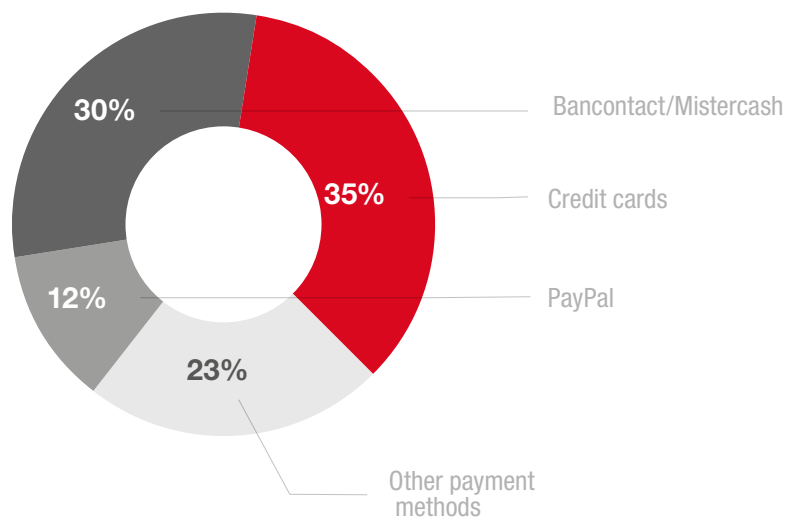
In general, Belgians are growing more comfortable with the idea of making a purchase online without first going into the store and seeing it in person.

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## Preferred payment methods

As with many e-commerce markets, the credit card is the preferred payment method among Belgian consumers<sup>6</sup>. In the second quarter of 2015, 35% of Belgians used their credit card for purchases, while 30% opted for Bancontact/Mister Cash and 12% used PayPal.

Favorites payment methods in Belgium

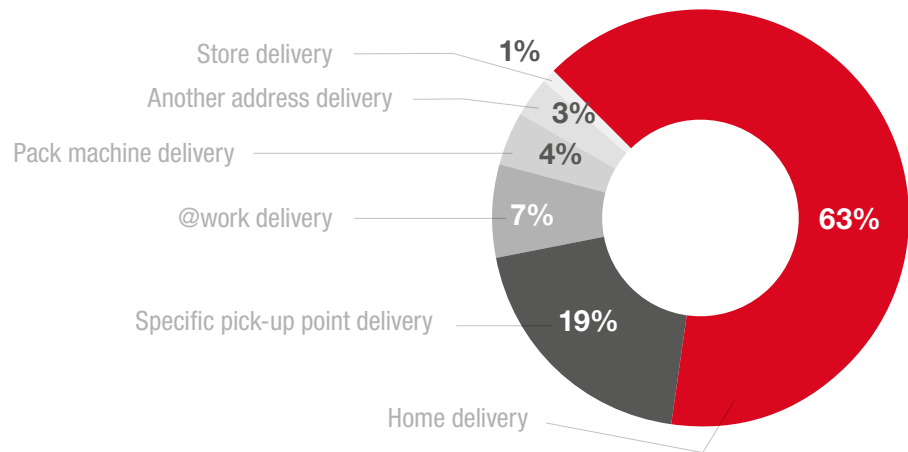


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## Preferred delivery solutions

Belgian consumers far away prefer home delivery over other e-tail delivery possibilities. According to a bpost survey, 63% of respondents preferred home delivery over any other delivery method. If home delivery is not possible, 19% prefers to pick-up their parcel at a specified pick-up point. Other delivery methods like delivery at work (7%), pick-up from a pack machine (4%), delivery to another address (3%) and pick-up in a store (1%) are less popular for now but are growing.

### Preferred delivery solutions in Belgium



This preference for delivery is mostly driven by convenience (no extra effort, time-saving). The demand for convenience is also reflected in the fact that delivery during the weekdays is preferred by ~60% of the consumers, with a huge preference for delivery after 6PM<sup>7</sup>.

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## Preferred online platforms

Much of e-commerce's expansion is related to the growth in Internet access across devices. Now, online shoppers can make purchases from nearly anywhere - with the rise of tablets and smartphones, consumers can browse their favorite stores wherever there is an Internet signal.

Still, most Belgians prefer to use their laptop or desktop computers for e-tail purchases. Those two methods account for 86% of 2015 Q2 online shopping in Belgium - the laptop at 52% and the desktop at 34%<sup>8</sup>. Meanwhile, the tablet came in at 10%, showing a stronger following. Smartphone use for e-shopping was still limited at 2.6%.

**86%**  
of Belgians  
prefer to use their  
laptop or desktop  
to order online.

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## Cross-border

Belgian shoppers engage in a fair share of cross-border e-commerce, given the nation's advantageous position in central Europe. Not only that, but Belgium was relatively late to the e-commerce game. As a result, many inhabitants opted to make purchases from nearby countries like the Netherlands, Germany and France.

Belgium is also divided into two distinct parts, Flanders and Wallonia, each with its own language and culture. Belgian e-tailers attempting to reach the entire country face some of the same challenges as they would when working with foreign markets. To a certain extent, consumers in Wallonia may feel more comfortable with French e-tailers than with Flemish, while some in Flanders may prefer Dutch businesses.

The top 100 online stores in Belgium reached €2.6 billion in revenue from 2014 to 2015, but around 72% of that money came from foreign consumers<sup>9</sup>. That number is high, but it's less than the previous year, which clocked in at 75%. Of that percentage, France, the Netherlands, the United States, the United Kingdom and Spain are the top five cross-border targets for Belgian e-tailers.



**72%**  
from the revenue of Belgian  
e-commerce comes from abroad.

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## Consumer expectations

Belgians look for low prices, convenience and no-risk product trials<sup>10</sup>, and e-tailers like Amazon, Bol.com and Zalando<sup>11</sup> have addressed those desires. As a result, Belgian retailers have made an effort to promote e-commerce and compete in the digital marketplace.

In a 2015 Q2 survey, respondents cited bpost first and DHL, Kiala, UPS and FedEx as the top 5 delivery providers<sup>12</sup>. Nearly 40% of those surveyed said they had no preference for a particular day of the week for delivery, though only 9% said they preferred Saturday or Sunday delivery during the day.

Some consumers have not completely bought into e-commerce. Almost a quarter want to be able to try the product - like making sure the clothes fit or handling the item to get an idea of its integrity. Another 24% were hesitant over shipping fees, while 19% were worried about e-tailers' ability to ship a product to the correct destination<sup>13</sup>.

However, those consumers may not yet be accustomed to recent developments in e-commerce accuracy and dependability. As the industry develops and expands, more Belgians will likely come to trust the online process as much as going into the brick-and-mortar location.

Belgium's e-commerce scene is trending upward, especially as e-tailers push competition and consumers find online shopping to be a more convenient, cost-effective way to find what they need.

**Belgians look for low prices,  
convenience and no-risk  
product trials.**



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