Speelgoed van het jaar

6 Oktober

Wim Van Edom

comeos

Anita Servais

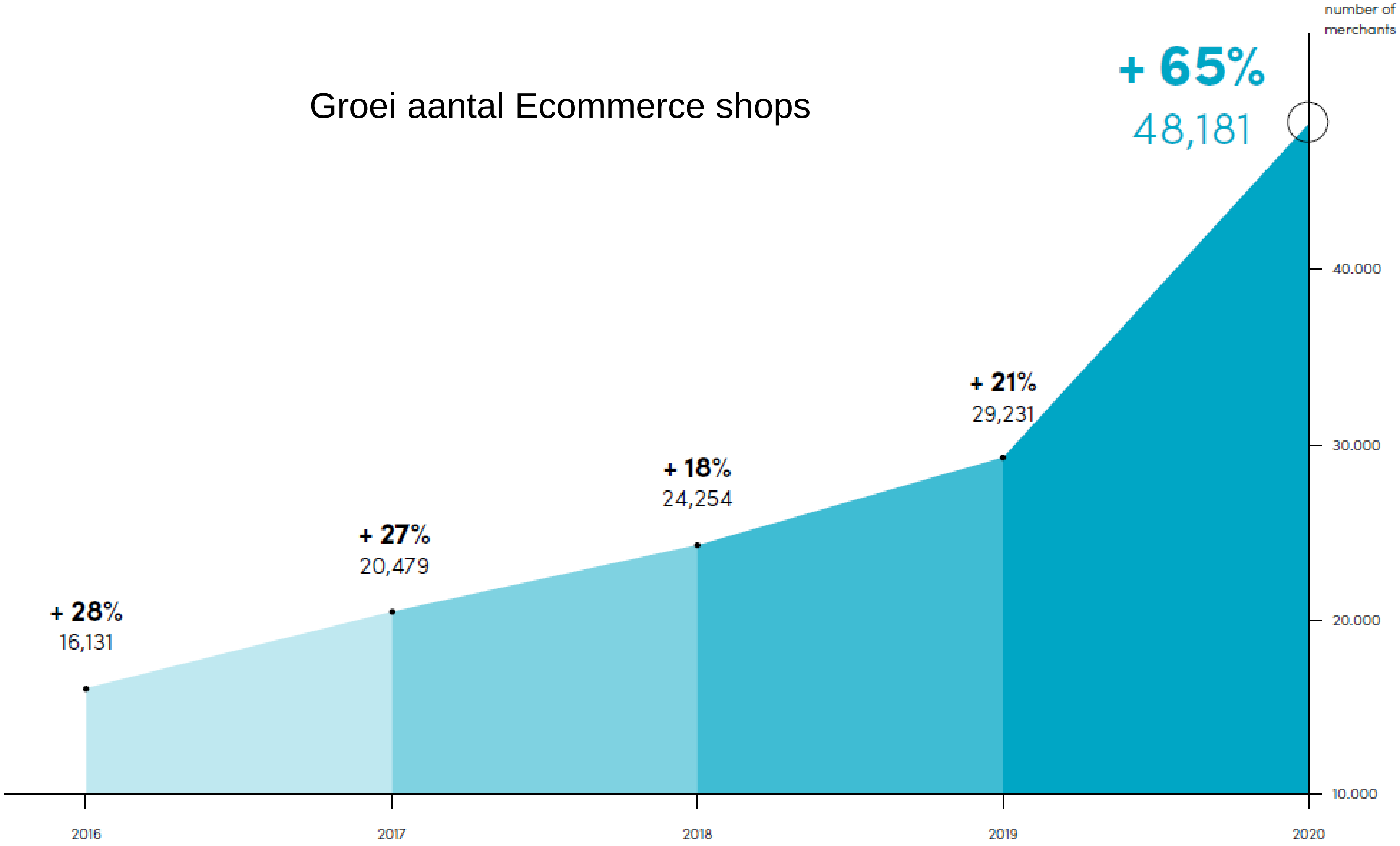
2019

“Le client doit se rendre compte que s’il continue à acheter uniquement en ligne, bientôt sa belle ville où il fait bon vivre se transformera en un endroit dénué d’âme. Il ne pourra plus voir les produits, plus les toucher, ni les essayer, il sera devant son ordinateur à faire ses commandes seul. “

Sterke groei van (vooral) kleine webshops

Long Tail

Groei aantal Ecommerce shops



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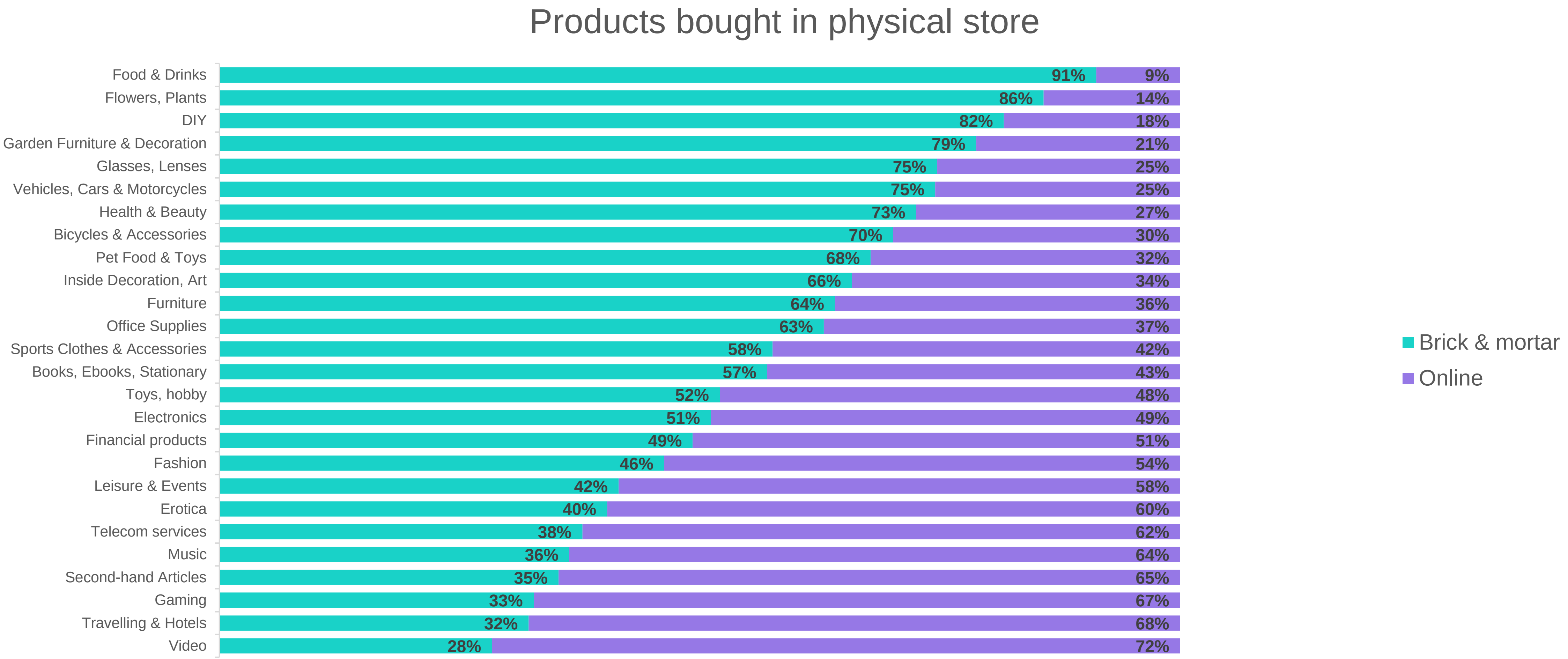
Safeshops: E-commerce Barometer 2020 Safeshops

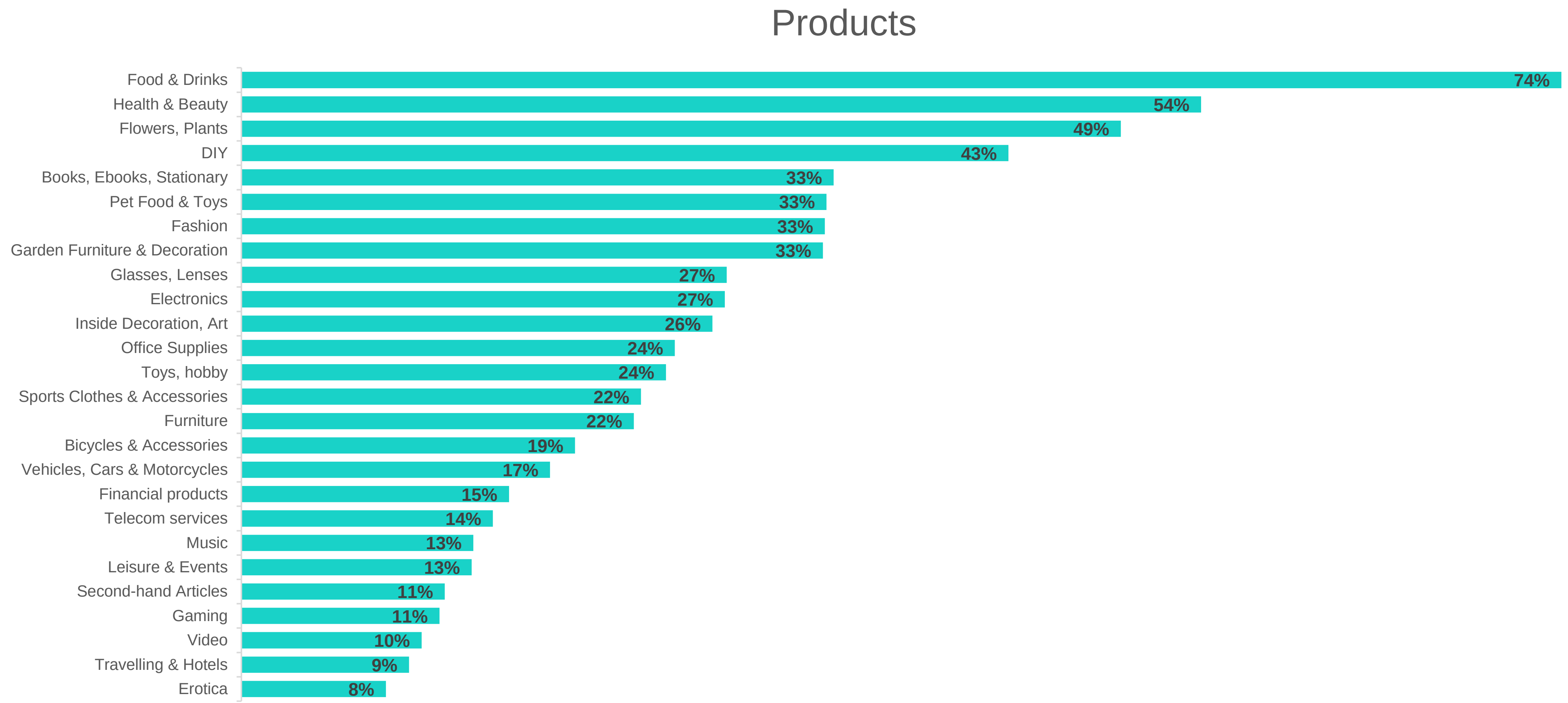
Which products did you buy in 2021?

Preferred in a physical store/online store



Which products did you buy in 2021?

Percentage of total population bought in physical stores

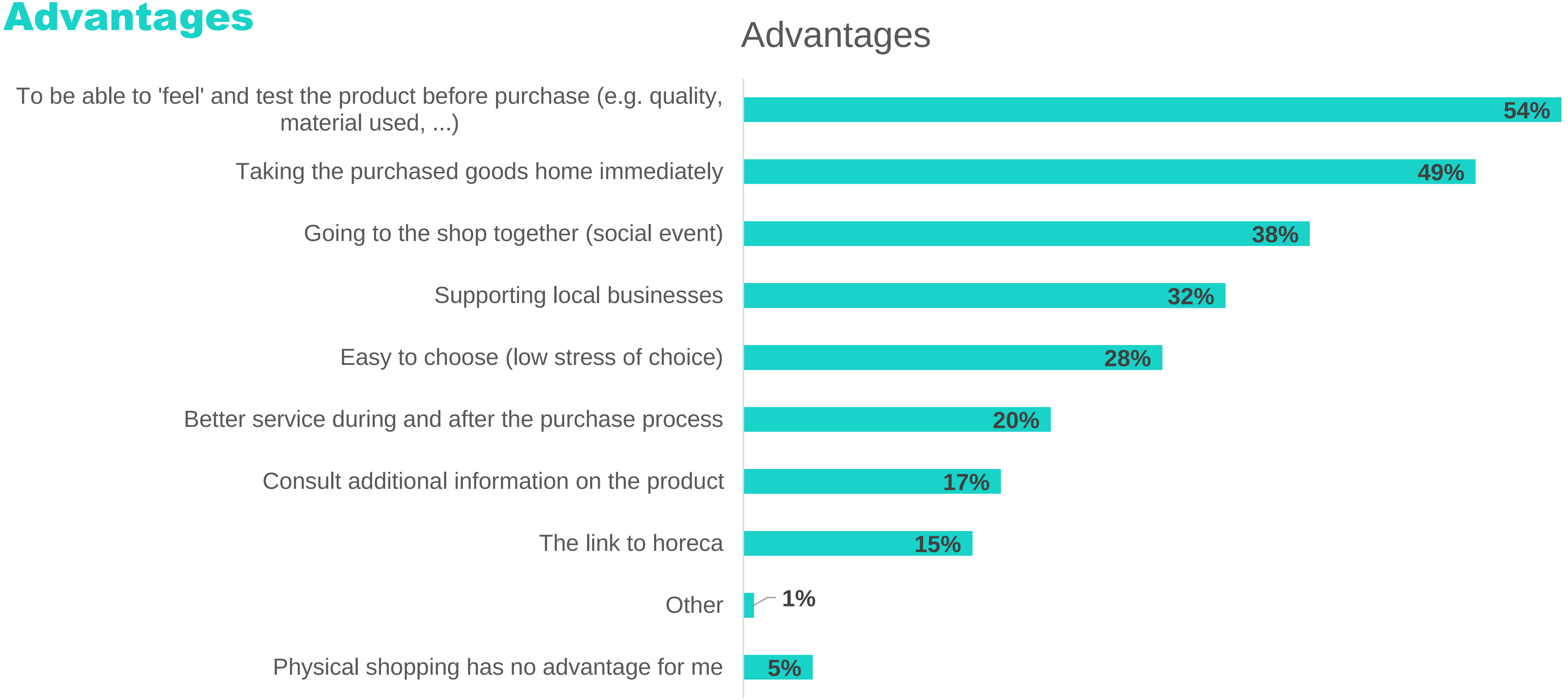


Why did you buy these products in a physical store?

Reasons

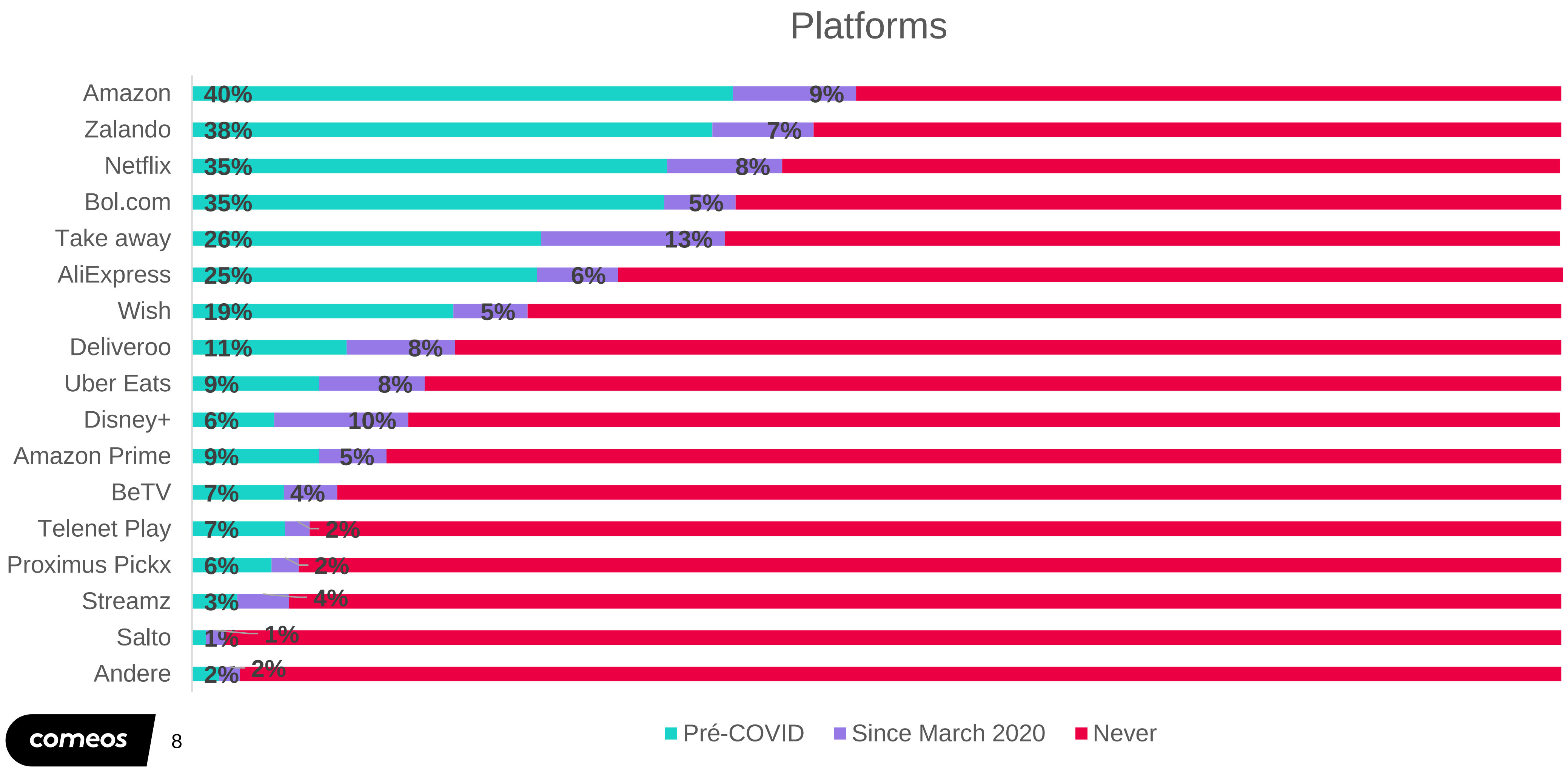
What are the most important advantages of shopping physically?

Advantages



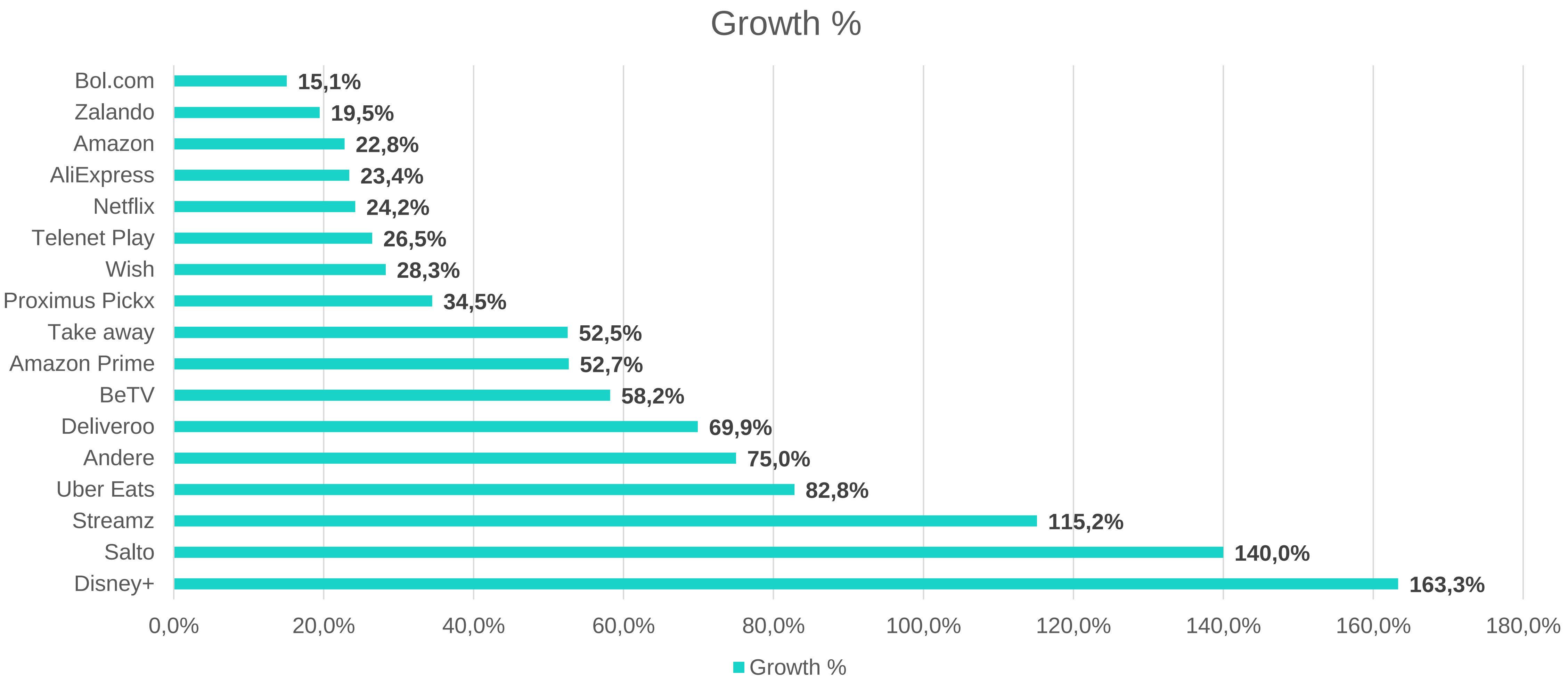
Did you ever order from the following platforms?

Never / Since COVID / Pré-COVID



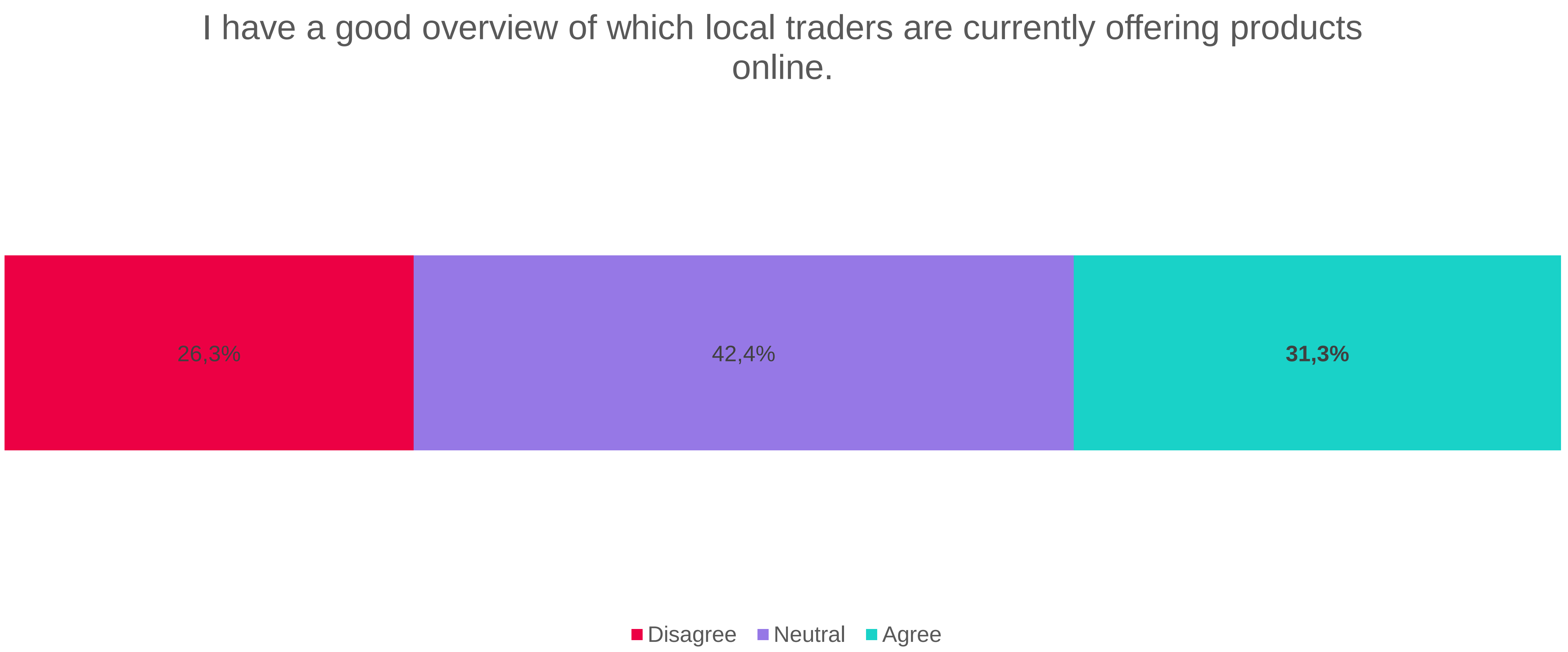
Growth of Platforms

Since COVID



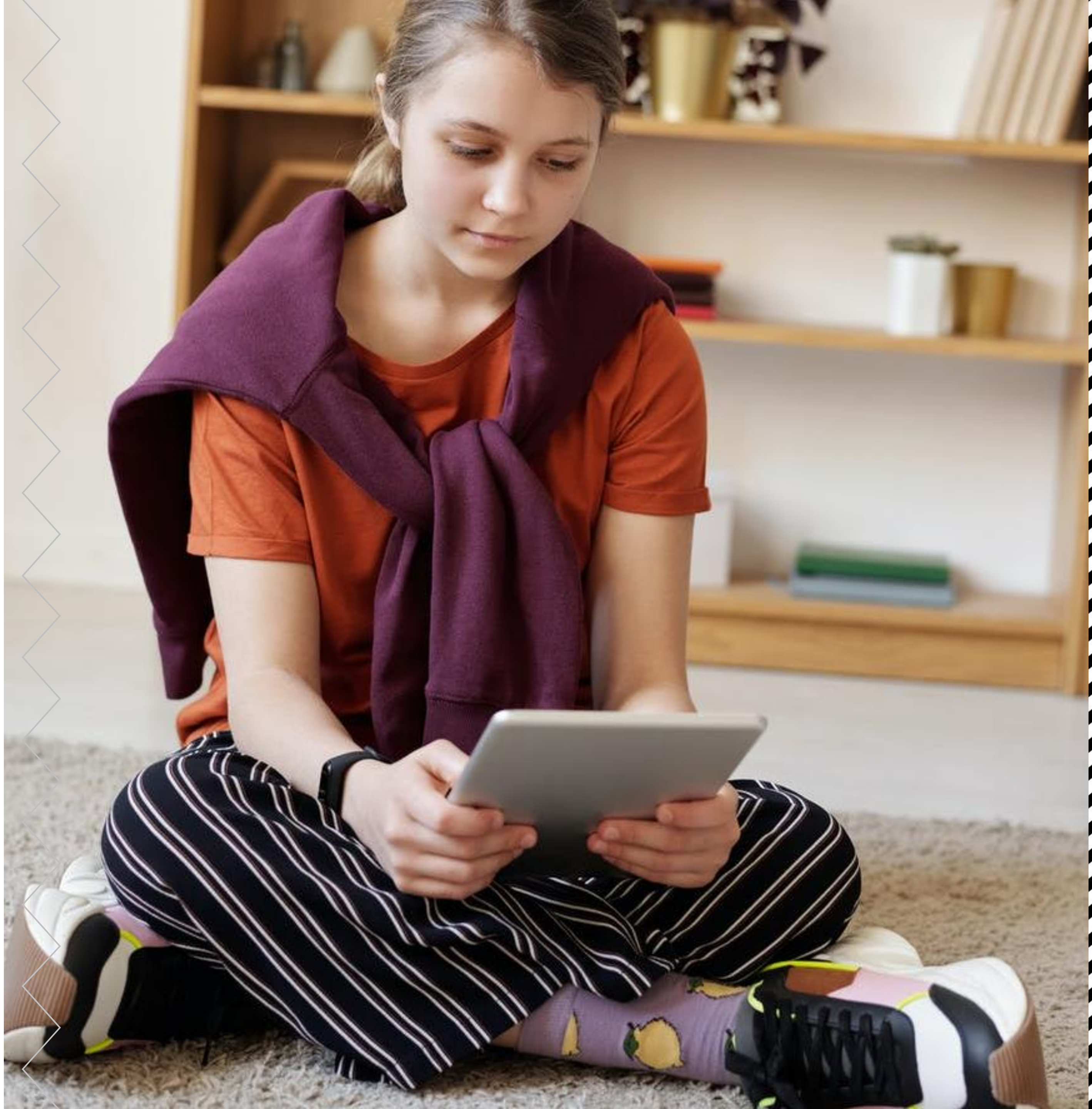
General statements on shopping

Agree/disagree



01

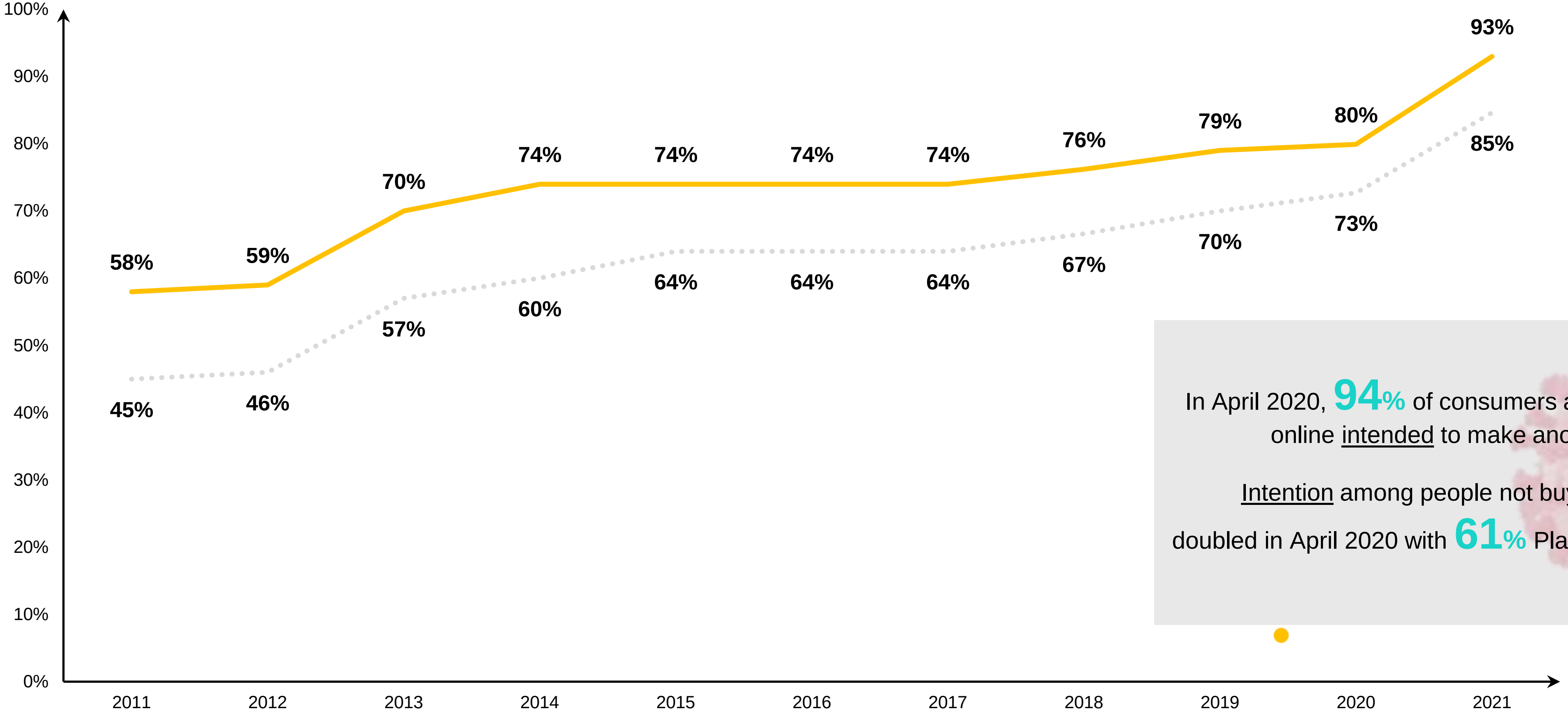
E-COMMERCE PENETRATION



Online penetration

Because of COVID-19, e-commerce in Belgium finds itself in a second acceleration after the big boom in 2013, with now also the laggards finally catching up with the large majority of the online population in Belgium. As predicted in 2020, many turned their intention to buy something online into reality, with now 85% of the Belgian population having bought something online over the past year or 93% among the Belgian online population.

Q: Did you make any online purchases in past 12 months? | Gross sample=2153 | Filter: none



In April 2020, **94%** of consumers already buying online intended to make another purchase

Intention among people not buying online yet doubled in April 2020 with **61%** Planning to do so

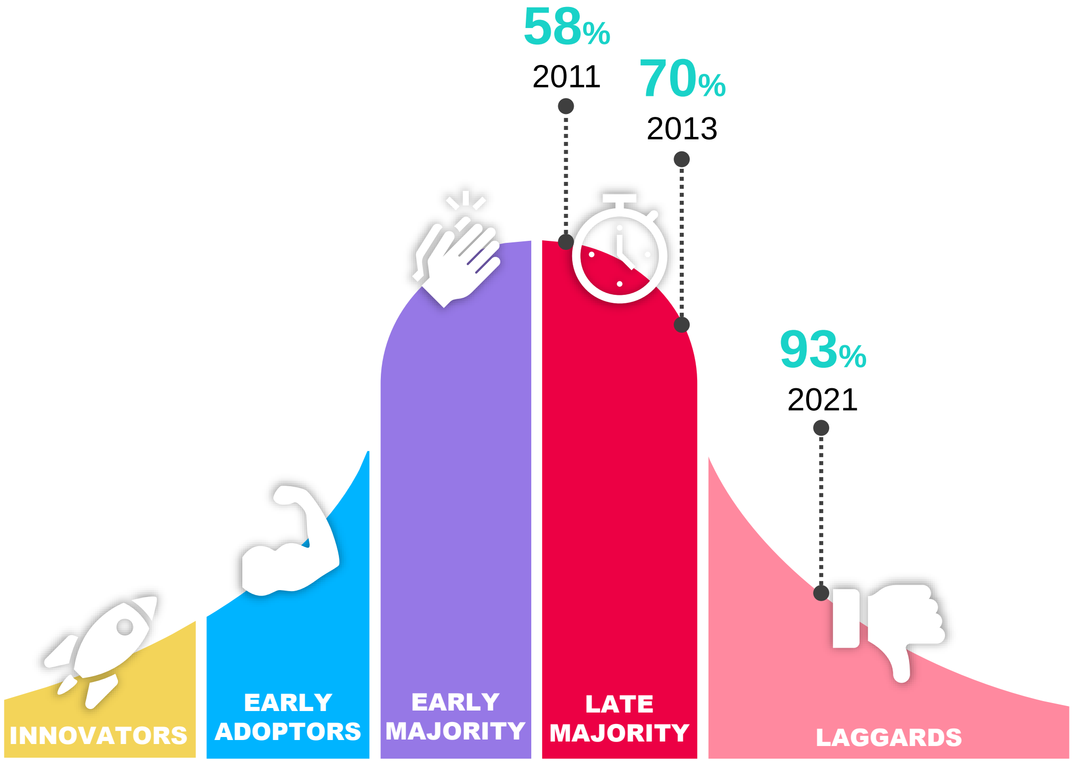
% of online population making online purchases

%* of Belgians making online purchases. Extrapolated to the Belgian population regarding the current internet-population (90% in 2020 based on estimate for January, 2020 - https://datareportal.com/reports/digital-2021-belgium)

Online penetration

With the large majority of the Belgian population buying online now, only the online penetration among laggards and consumers older than 55 remains a bit lower compared to the other target groups. People with a medium income and having kids on the other hand have a significantly higher penetration when comparing to others.

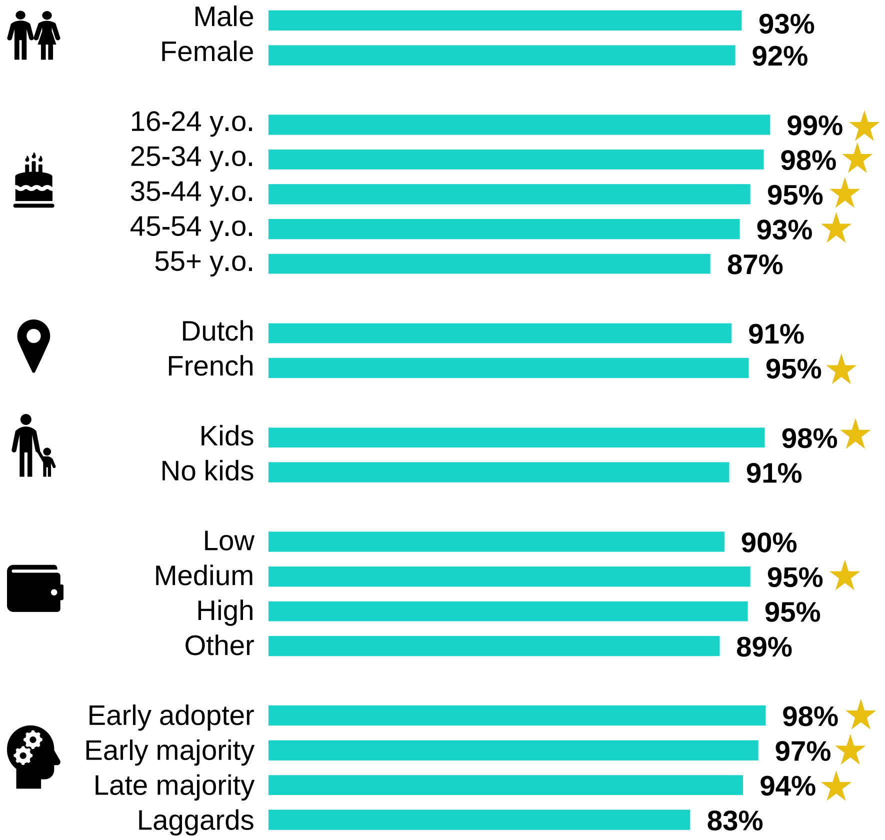
Q: Did you make any online purchases in past 12 months? | Gross sample=2153 | Filter: none



Since 2011, the majority of the online Belgian population is buying online. After the big boom in 2013, also the late majority discovered e-commerce.
Because of the corona crisis, e-commerce in Belgium gained momentum again and after a long period of stagnation the laggard are finally catching up with the rest of the population too.

Penetration among different profiles

% of consumers bought via Internet in the past 12 months

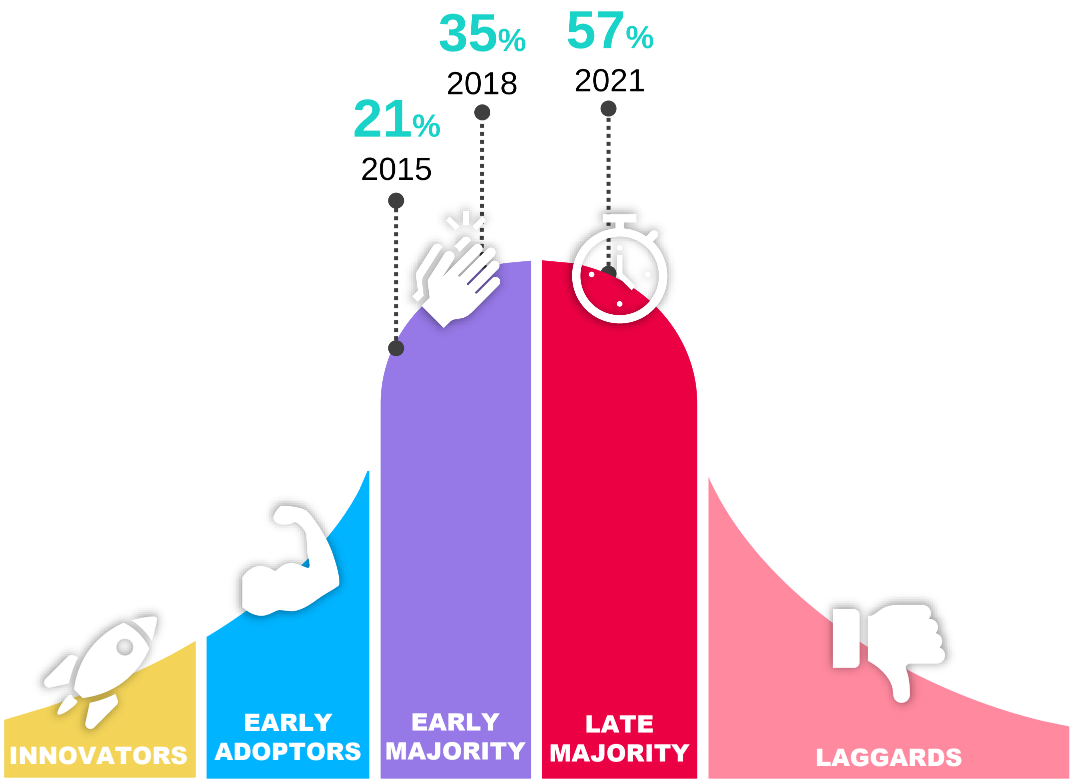


★ Sign. Different compared to the other target group (95% confidence level)

Mobile penetration

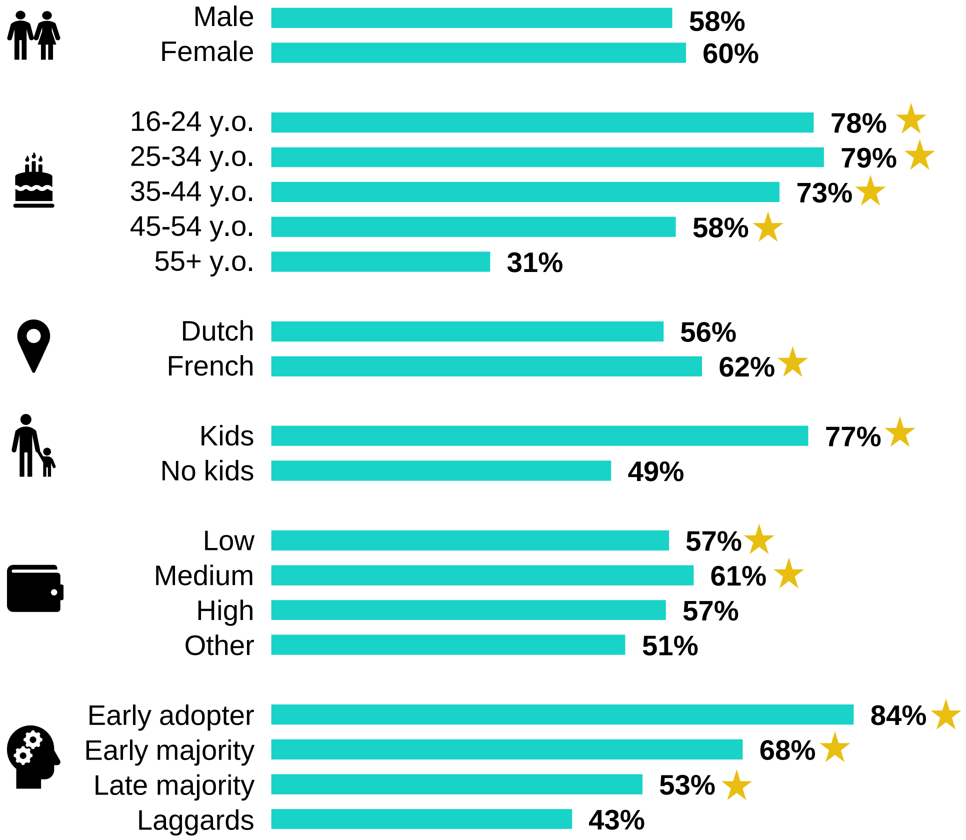
With this new increase, mobile commerce finally entered the late majority of the Belgian population. Still, younger consumers remain the front runners in using a mobile device for making an online purchase, but now also 45-54 year olds are catching up.

Q: Did you make any online purchases in past 12 months? | Gross sample=2153 | Filter: none



Mobile penetration among different profiles

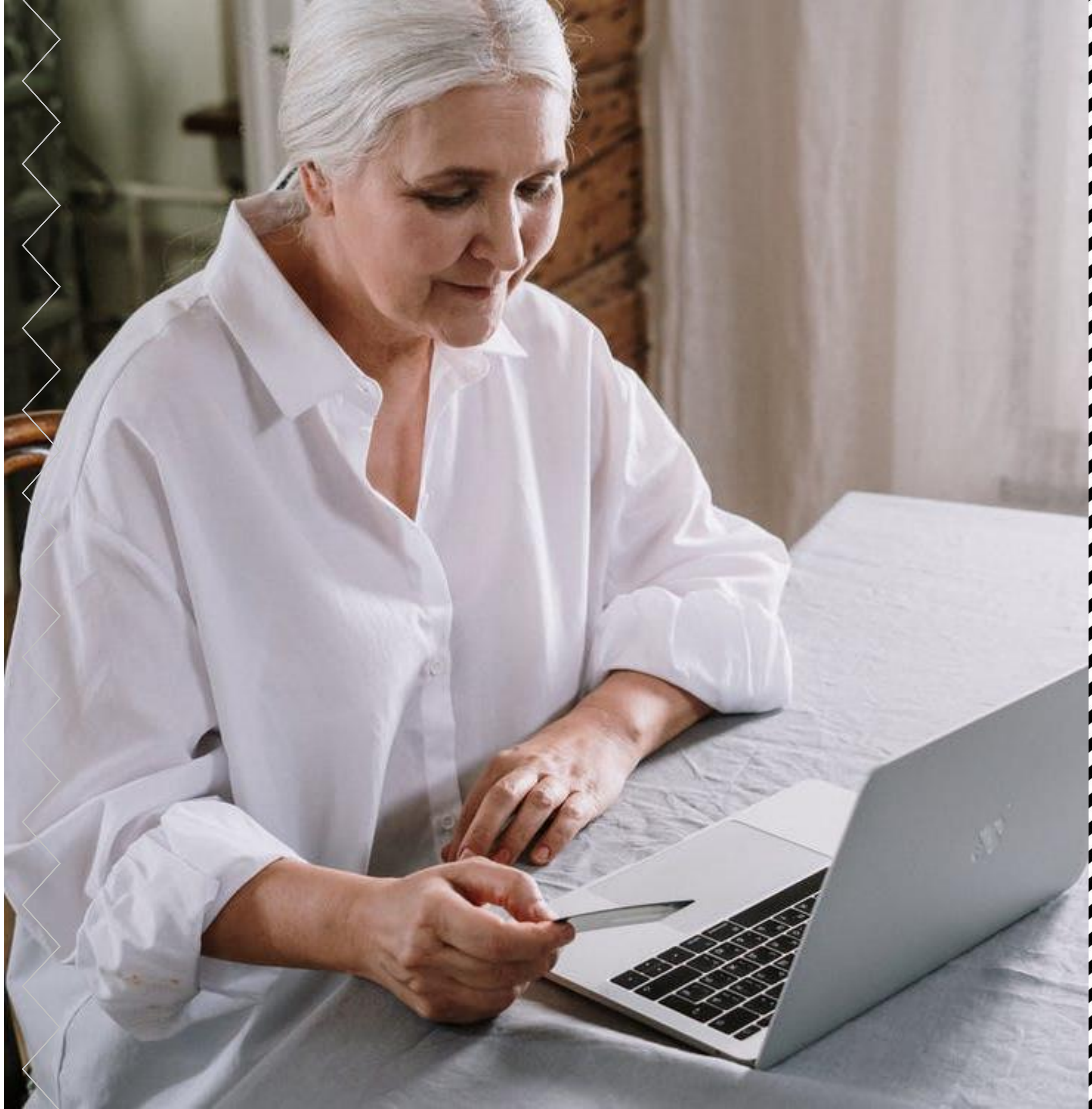
% of consumers bought via a mobile device in the past 12 months



★ Sign. Different compared to the other target group (95% confidence level)

02

CURRENT ONLINE SHOPPING BEHAVIOUR



Online categories purchased

The categories fashion and health & beauty remain top of the list with around 7 out of 10 people buying both categories online. This year, a large increase is noted for the categories flowers & plants, bicycles and glasses, the first two likely driven by the existing crisis situation in Belgium. Also linked to the corona crisis, the online purchase of leisure and travel further decreased compared to previous measurement.

Q: Via which channel did you buy each of the following categories in the past 12 months? | Main sample=2001 | Filter: made an online purchase in the past 12 months

	2021 purchases online	Difference 2021 - 2020	Difference 2021 - 2011
Fashion	74%	6%	36%
Health and beauty	65%	7%	45%
Books, E-books	56%	10%	26%
Computers & Electronics	56%	5%	16%
Toys and hobbies	52%	6%	40%
Sport	51%	10%	44%
Leisure	51%	-11%	N.A.
Food	49%	9%	41%
Telecom	48%	5%	32%
Decoration	47%	10%	N.A.
Animal food & toys	46%	8%	N.A.
Office supplies	46%	8%	N.A.
Financial products	45%	8%	N.A.
DIY materials	44%	N.A.	44%
Garden and outdoor	43%	10%	37%
Cookware	43%	9%	N.A.
Travel	42%	-15%	-17%
Gaming	40%	8%	N.A.
Music	39%	5%	N.A.
Video	39%	6%	N.A.
Furniture	39%	10%	N.A.
Flowers and plants	38% ▲	11%	N.A.
Glasses	31% ▲	11%	N.A.
Bicycles	26% ▲	11%	N.A.
Vehicles	23%	10%	21%
Erotica	23%	7%	N.A.

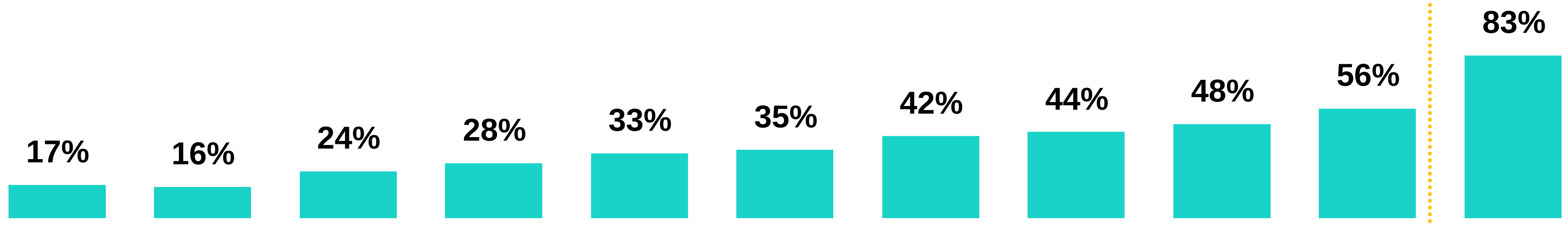
▲ **Categories with the strongest increase compared to 2020 (Top 3)**

Note:
- The category DIY materials was newly added in 2021.

Purchase frequency

After the increase previous year, purchase frequency rises again in 2021. Because of the COVID-19 crisis people buy especially more on a biweekly to monthly basis, but also the number of consumers buying online daily and weekly increased. In combination with the fact that on average consumers buy around 4,5 different categories online, online purchases are highly centred around a few main categories consumers are used to buying.

Q: How frequently do you buy something online? | Main sample=2001 | Filter: made an online purchase in the past 12 months

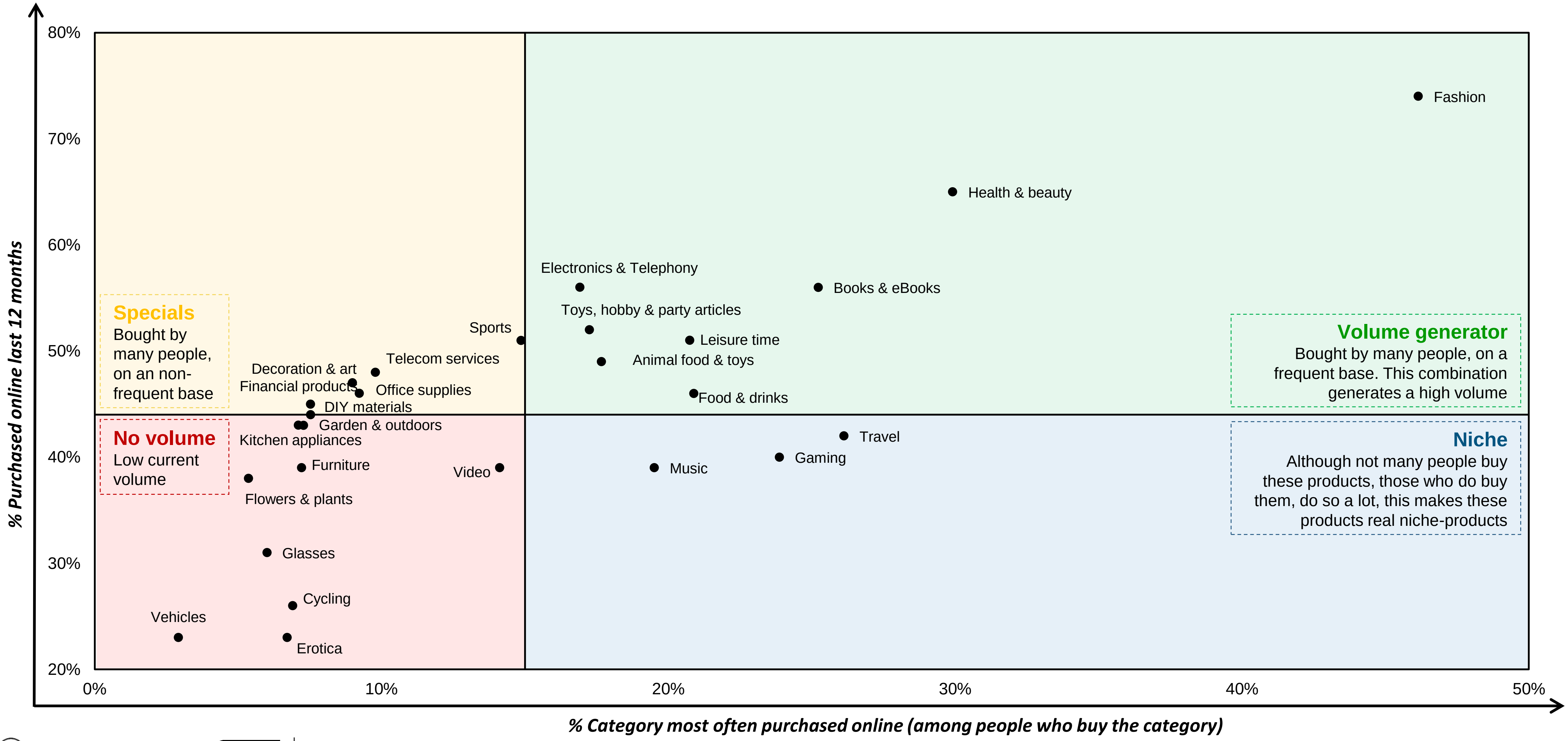


	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Daily	-	-	-	-	-	-	-	-	-	2%	5%
Weekly	2%	2%	4%	5%	6%	8%	7%	9%	12%	18%	23%
Biweekly	-	-	-	-	-	-	-	-	-	-	15%
Monthly	15%	14%	20%	23%	27%	27%	35%	35%	36%	37%	40%
Every 1 to 6 months	53%	54%	53%	53%	49%	48%	45%	46%	45%	35%	13%
Less often	30%	30%	24%	19%	19%	16%	13%	11%	8%	8%	4%

Purchase frequency

Fashion and health & beauty are by far the biggest volume generators among online categories. Although music, gaming and travel are not bought by the large majority of people, consumers who do so indicate to buy the category most often.

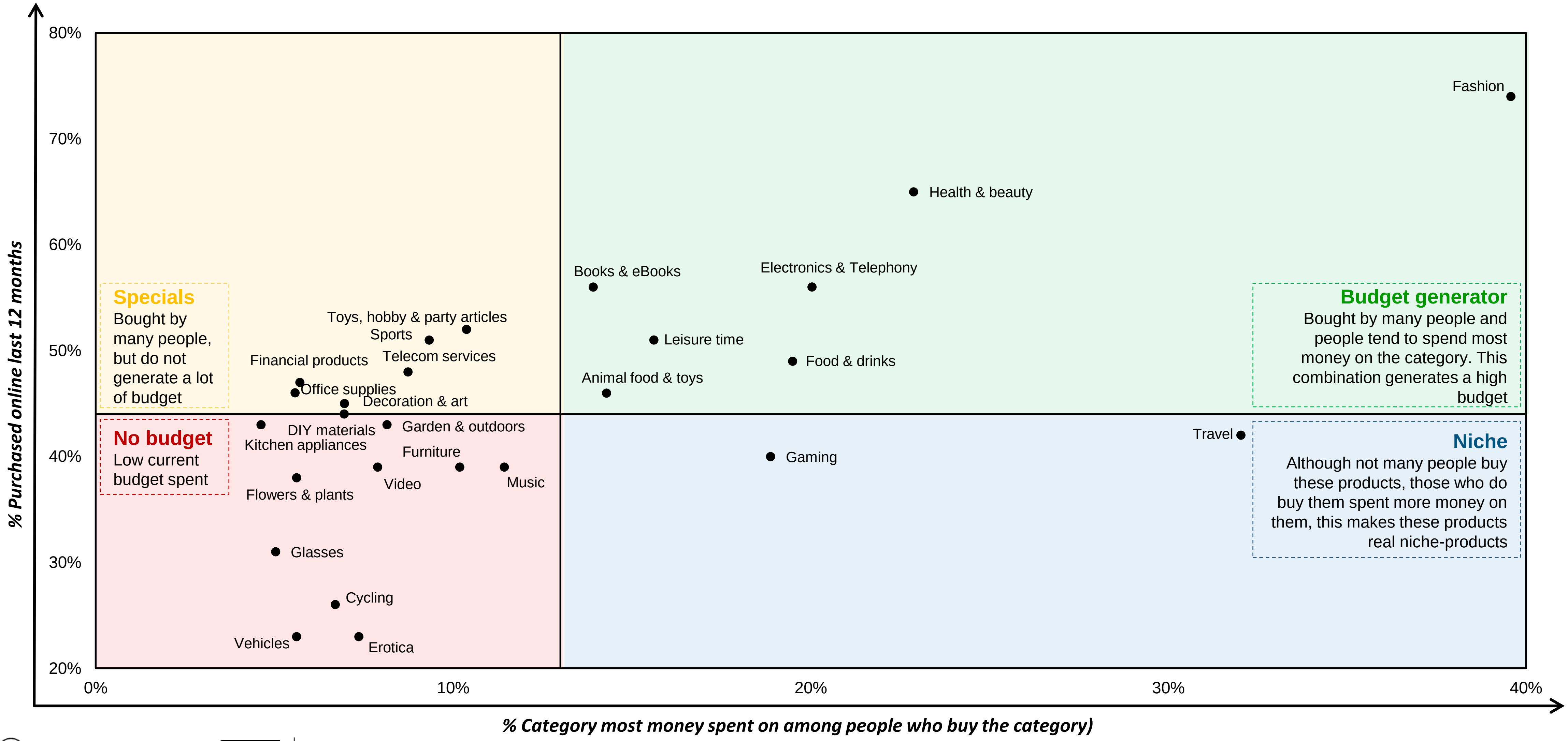
Q: Which of the categories below do you online buy most often? | Min sample =445, max sample = 1478 | Filter: bought the category online in the past 12 months



Budget spent

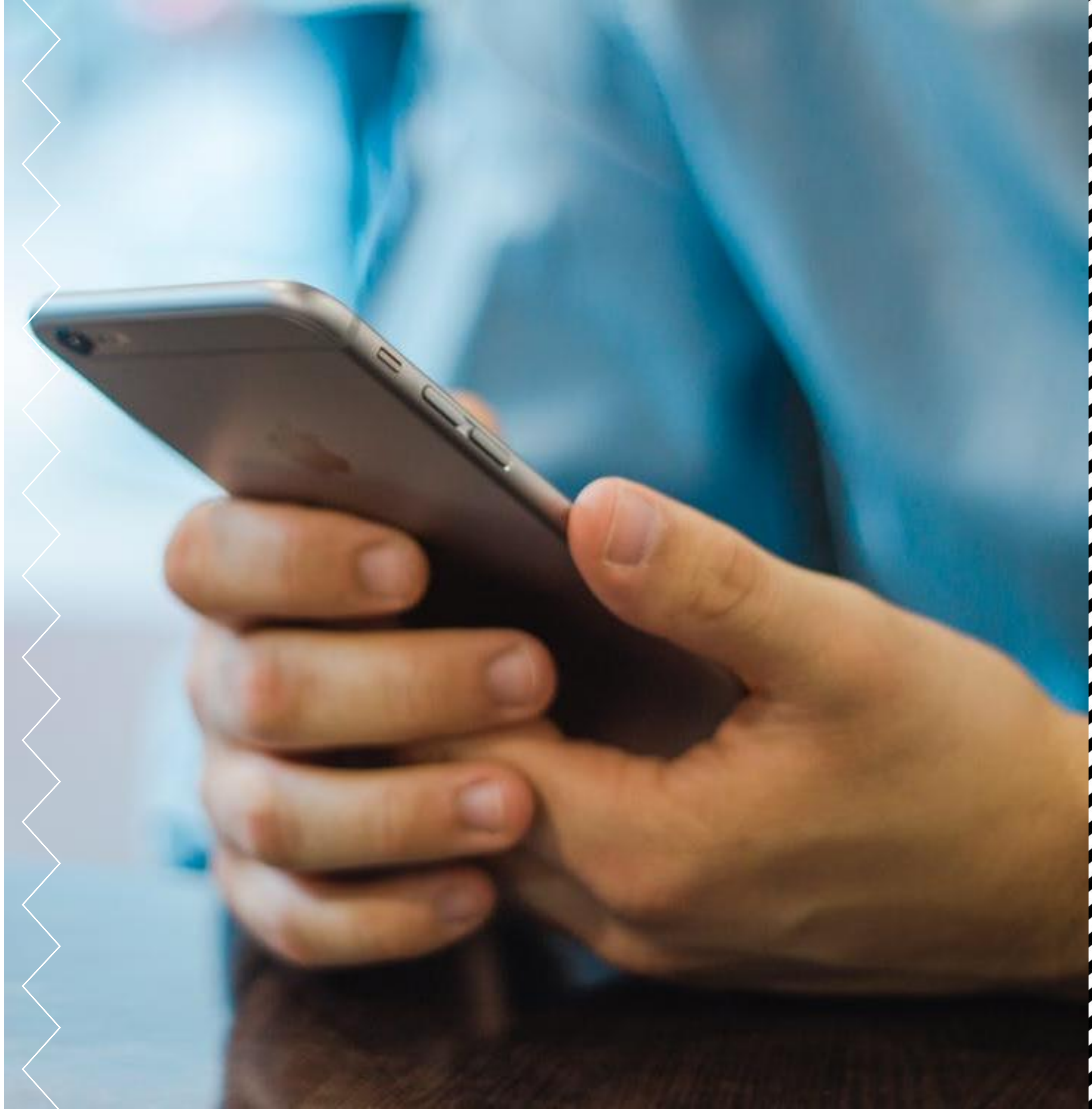
Also in terms of budget, fashion and health & beauty are the biggest categories people spent most money on. Again travel, but also gaming are more niche categories that generate a lot of budget when bought.

Q: On which of the categories below do you spend the most money online? | Min sample =445, max sample = 1478 | Filter: bought the category online in the past 12 months



03

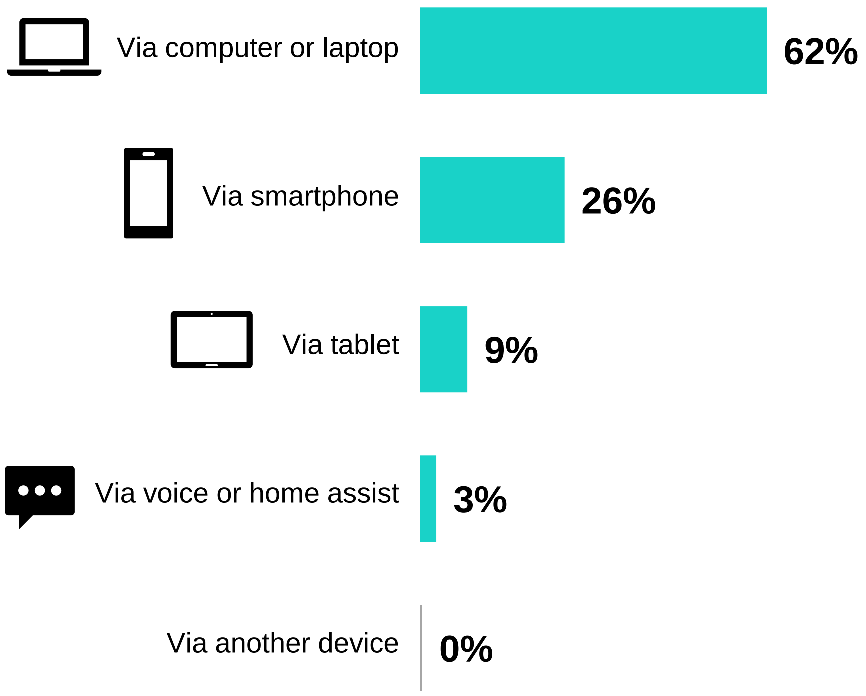
PURCHASE DEVICE

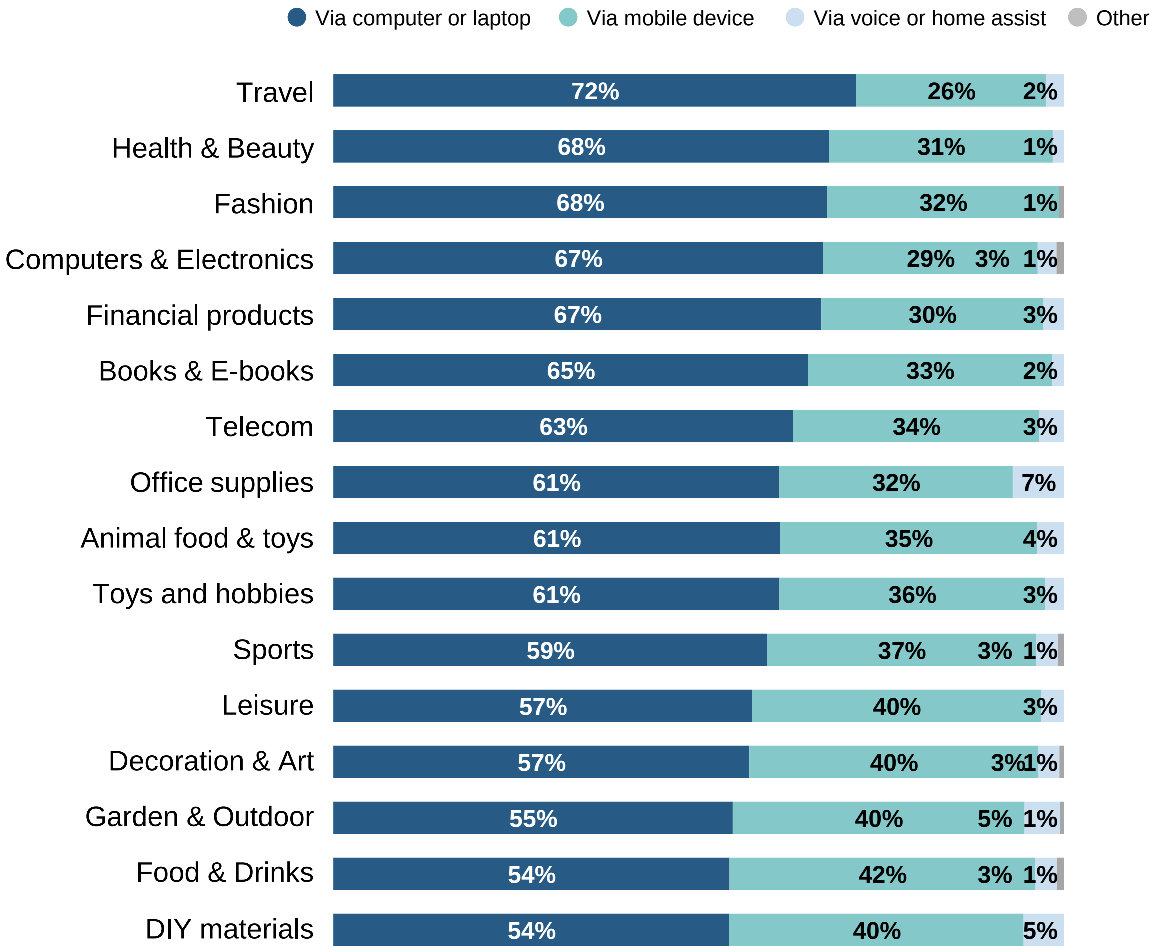


Preferred device for online purchases

In terms of preference, computer and laptop are the clear winners, but also 1 in 4 prefer their smartphone to make an online purchase. Especially for travel, health & beauty and fashion the laptop is most preferred. For food & drinks people most often choose a mobile device.

Q: Which of the devices below do you prefer to use for your online purchases within the category …? | Main sample=2001 | Filter: made an online purchase in the past 12 months



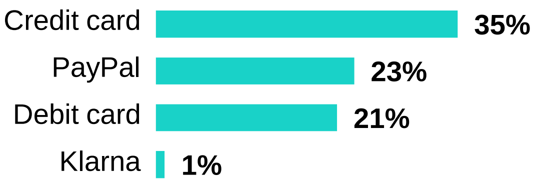


Payment method

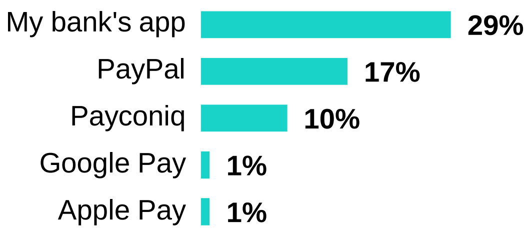
Online payment is still the most common payment method used with 7 out of 10 who consider this to be their main method when buying online This is most often via credit card. However, in second place comes ‘My bank’s app’ with 29% who mainly use this mobile payment method.

Q: In general, how do you pay for your online purchases? | Main sample=2001 | Filter: made an online purchase in the past 12 months

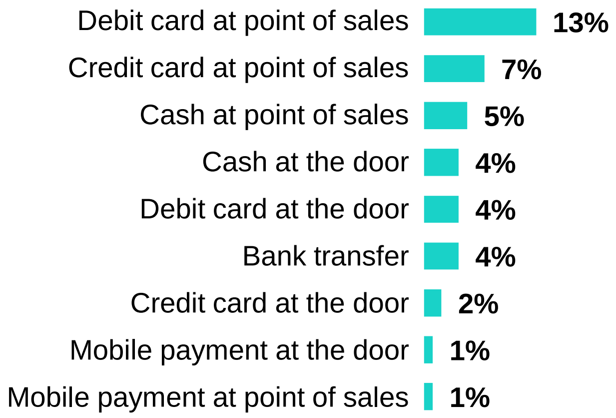
73% mainly use an **online payment** method to pay for online purchases



53% of Belgians mainly use a **mobile payment** method to pay for their online purchase



40% mainly **pay face-to-face** for their online purchases



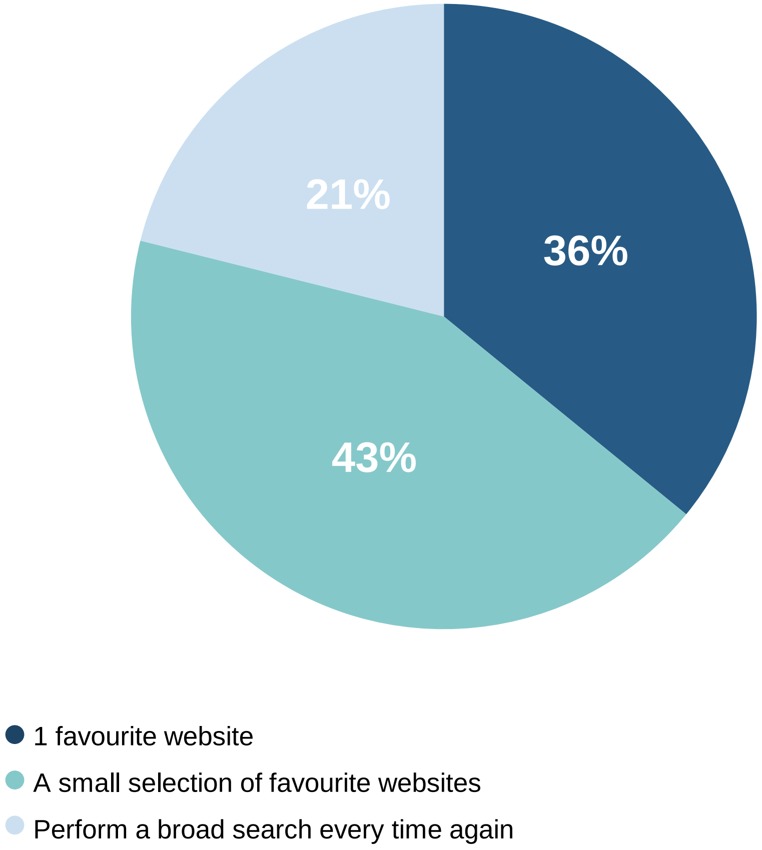
04

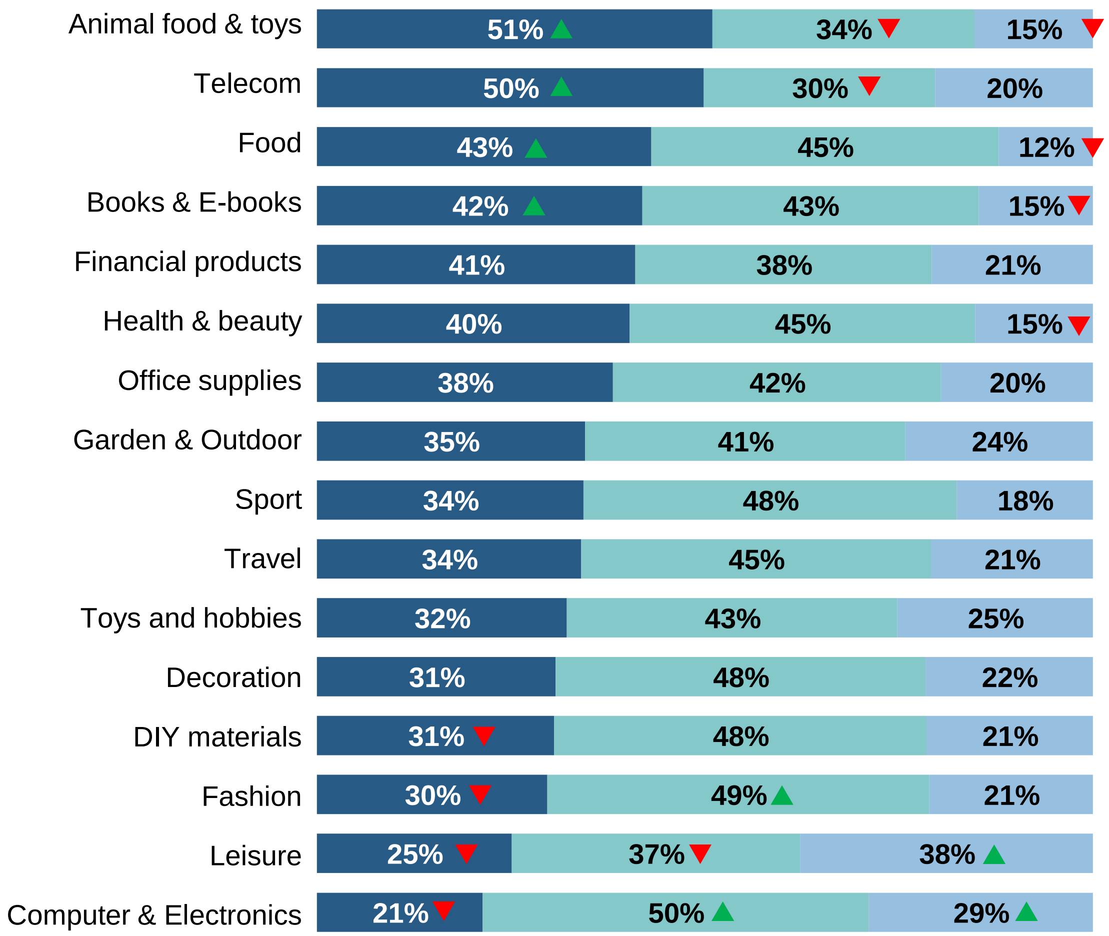
PURCHASE CHANNEL

Number of websites searched

The vast majority of consumers buying online have a small selection of favourite websites they consult when making an online purchase. Especially for Animal food & toys, food, books & eBooks and health & beauty this is the case. For leisure and computer & electronics, people tend to perform a much wider search.

Q: When you are looking to purchase a product within the category…, how many websites do you view? | Main sample = 2001 | Filter: made an online purchase in the past 12 months



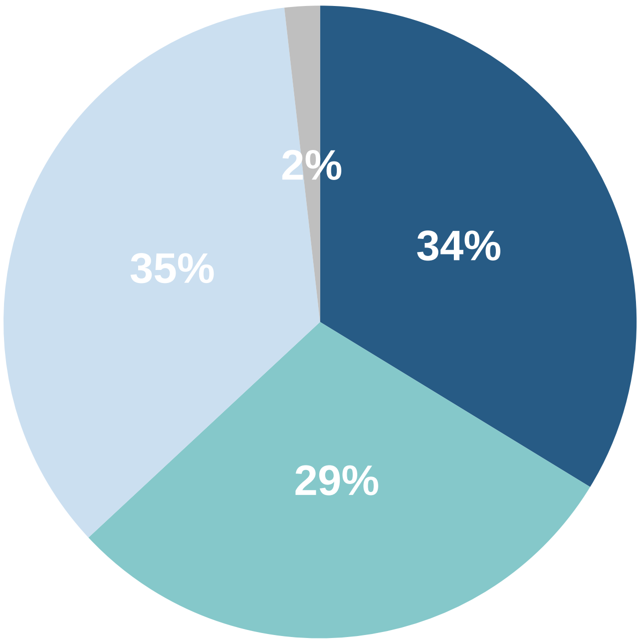


Significantly higher / lower compared to total

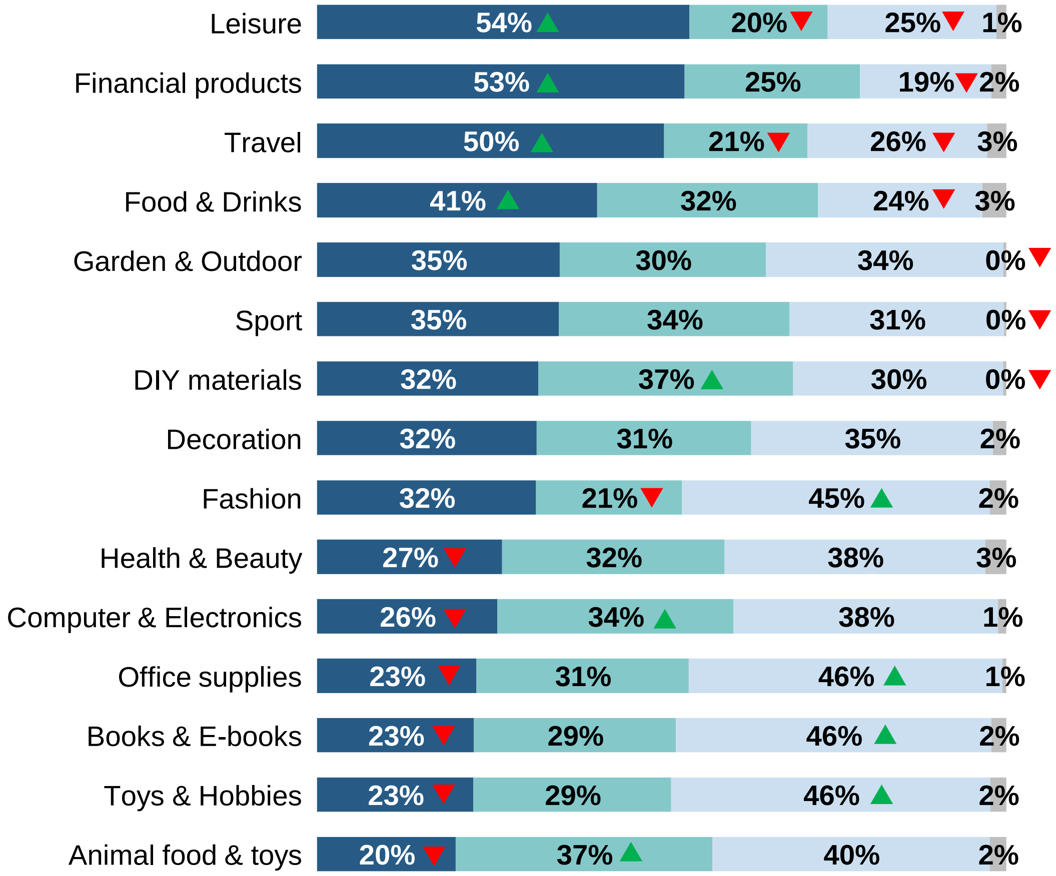
Preferred online purchase channel

In 2021, a strong increase of the local web shop is noted with more people preferring to buy from the brand itself instead of buying via a bigger platform. Especially for leisure, financial products, travel and food & drinks the website of the brand itself is preferred. For fashion, office supplies, books & eBooks and toys & hobbies a general platform is more liked.

Q: Via which channel do you prefer to make your online purchases? | Main sample = 2001 | Filter: made an online purchase in the past 12 months



	Difference 2021 - 2020
Purchased via the brand itself	14%
Purchased via a retailer	3%
Purchased via a general platform	-12%
Purchased via another channel	-5%



Significantly higher / lower compared to total

Sector slides

Toys & Hobbies

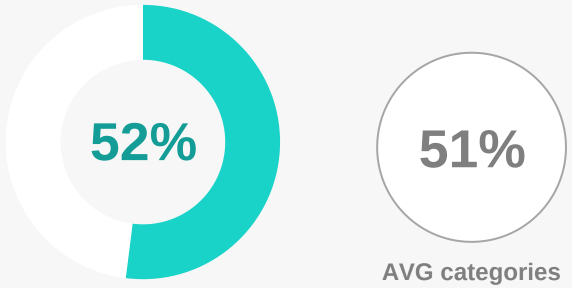
Around 1 in 2 consumers in Belgium buy toys & hobbies online. These consumers are especially people with kids, who have a more innovative profile and are less often older than 55 years old.

Toys & hobbies is not a category that generates a lot of money, with 5% of people buying the category online indicating they spend most budget on it.

Also, the category is more often bought via a general platform and less often via the website or web shop from the brand itself.

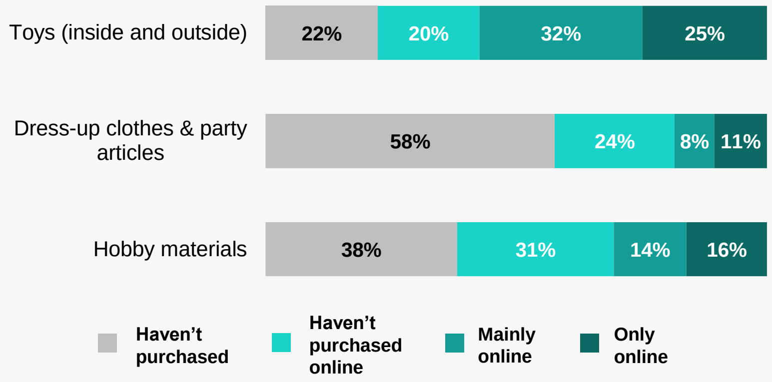
Online purchases

Purchased at least one item online in the last 12 months



Online penetration

Purchased online in the last 12 months



Profile (online purchases)

Gender		AVG categories
Male	51%	49%
Female	49%	51%

Family situation		AVG categories
Kids	47% ▲	33%
No kids	53% ▼	67%

Age		AVG categories
16-24	17% ▲	14%
25-34	22% ▲	17%
35-44	22% ▲	17%
45-54	17%	18%
55+	22% ▼	35%

Region		AVG categories
Flanders	56%	57%
Brussel	12%	11%
Wallonia	32%	32%

Income		AVG categories
Low	29%	32%
Medium	65%	62%
High	6%	6%

Innovation profile		AVG categories
Early adopter	14% ▲	11%
Early majority	29% ▲	25%
Late majority	43% ▼	47%
Laggards	14% ▼	18%

n = 350 | Filter: purchased toys & hobbies articles online in the past 12 months

*Avg. across all subcategories

▲▼ Significant difference compared with total

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Sector slides

Toys & Hobbies

Frequency & spending

	% buy the category most often	% spend most money on the category
	9%	5%▼
AVG categories	10%	8%

Preferred channel

		AVG categories
Via a platform	46%▲	35%
Via a retailer	29%	29%
Via the brand	23%▼	34%
Other	2%	2%

Device preference

		AVG categories
A computer/ laptop	61%	62%
A smartphone	29%	26%
A tablet	7%	9%
A voice or home assistant	3%	3%
Other device	0%	0%

of websites visited

		AVG categories
A limited number of favourite websites	43%	43%
1 favourite website	32%	36%
Performs a broader search	25%	21%

Type of purchase & app usage

	% bought via an app	% bought second hand
	32%	23%
AVG categories	34%	21%

n = 350 | Filter: purchased toys & hobbies articles online in the past 12 months

*Avg. across all subcategories

▲▼ Significant difference compared with total

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