

Ecommerce Report: Belgium

2019

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BY LA POSTE & SWISS POST

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the payment people

SAP®

 **OSUDIO**
BY **SQLI**

 **Manhattan**
Associates®



Thank you for reading this report

Thank you for downloading this report. We hope it will help you take the next step in selling online in Belgium.

The Ecommerce Foundation is an independent organization, initiated by worldwide national ecommerce associations as well as online and omnichannel selling companies from industries such as retail, travel & finance. Our **mission** is to **foster global digital trade** as peace is the natural effect of trade. By facilitating digital commerce we hope to make the world a slightly better place.

If you like our reports, please visit our report page on www.EcommerceWiki.org. On this page, you will find a large collection of **Ecommerce Country Reports for free**.

Valued Report Partners



SAP Customer Experience is a business unit of SAP, providing omnichannel customer engagement and commerce solutions that allow organizations to build up a contextual understanding of their customers in real-time, deliver a more impactful, relevant customer experience and sell more goods, services and digital content across every touch point, channel and device. Through its state-of-the-art customer data management, context driven marketing tools and unified commerce processes, SAP Customer Experience has helped some of the world's leading organizations to attract, retain and grow a profitable customer base.



Asendia is one of the world's top three international mail, shipping and distribution organisations, delivering your packages, parcels and documents to more than 200 destinations across the globe.

We combine the experience and expertise of our founding companies, La Poste and Swiss Post. As a joint venture, we bring together a wealth of international and local expertise and connections. Today we employ over 1,500 people in fifteen country offices in Europe, Asia and the USA - a global network blended with a local presence.



We are Osudio. An award-winning digital agency. We are part of the SQLI group and one of Europe's largest and most experienced e-business specialists.

Having worked in e-business since the 90's we understand what works, what doesn't and what drives growth. Many of our national and international clients are market leaders. Our goal is to help them evolve their business model so they can excel in every market or channel.

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Computop offers local and innovative omnichannel solutions for payment processing and fraud prevention around the world. For ecommerce, at POS and on mobile devices, retailers and service providers can choose from over 350 payment methods and acquirer connections.

Computop, a global player with locations in GER, CN, UK, USA, processes transactions for more than 16,000 retailers annually, such as Bigpoint, C&A, Fossil, illy, Otto Group, Sixt and Swarovski, with a combined value of \$ 34 bln.



Manhattan Associates is a technology leader in supply chain and omni-channel commerce. We unite information across the enterprise, converging front-end sales with back-end supply chain execution. Our software, platform technology and unmatched experience help drive both top-line growth and bottom-line profitability for our customers. Manhattan Associates designs, builds and delivers leading edge cloud and on-premise solutions so that across the store, through your network or from your fulfilment centre, you are ready to reap the rewards of the omni-channel marketplace.



Ecommerce Foundation is an independent organisation, initiated by national ecommerce associations worldwide and omnichannel-online companies from the retail, travel, and finance industries.

Our mission is to facilitate ecommerce through the development of practical knowledge, market insights, and services.



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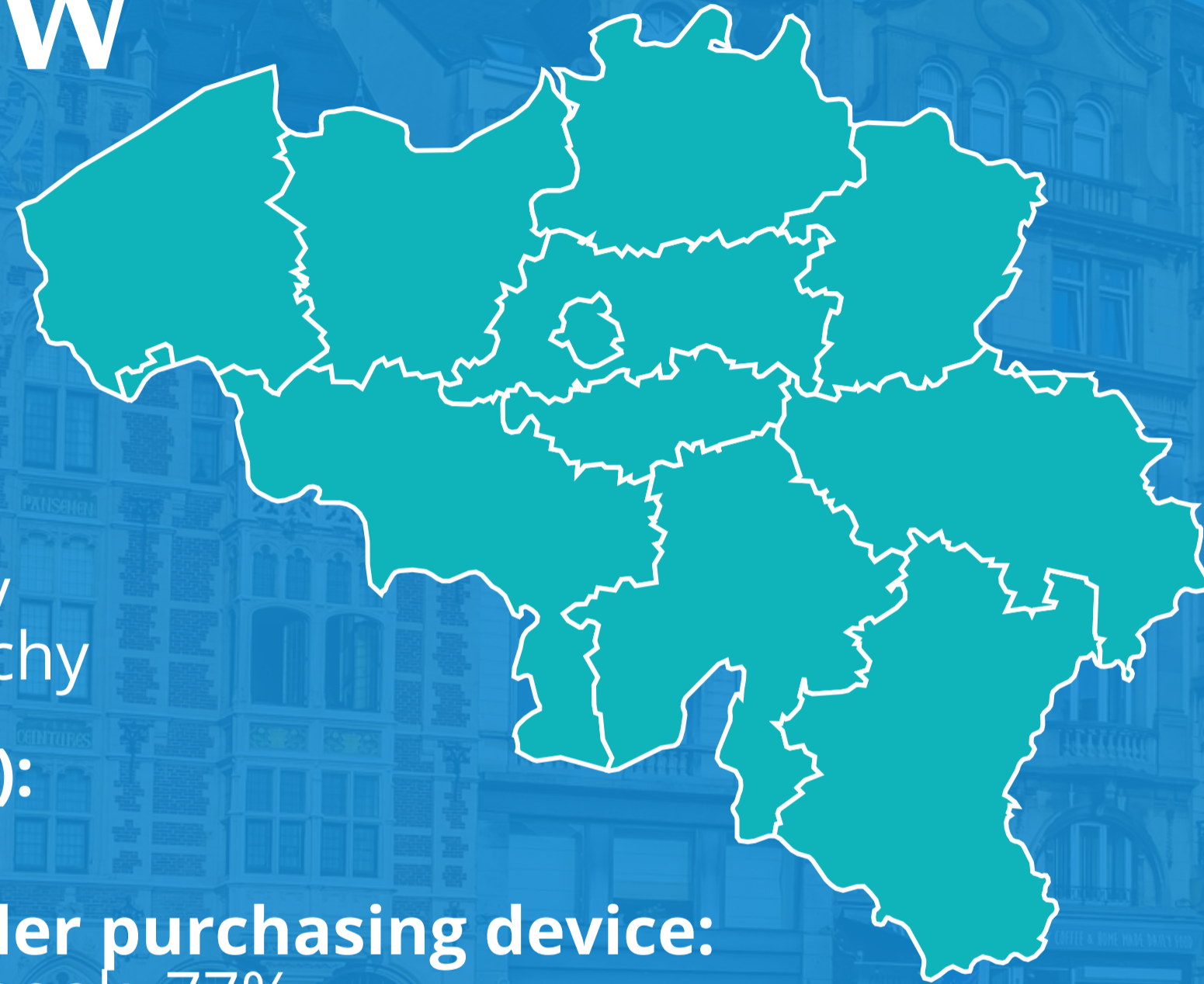
#1

BELGIUM OVERVIEW

AREA: 30,528 KM²

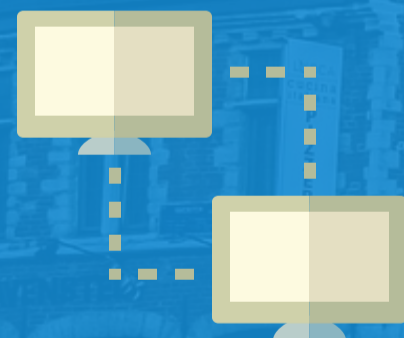
CAPITAL: Brussels

CURRENCY: Euro (EUR)



Government:

Federal Parliamentary
Constitutional Monarchy



Internet users (2018):

89%

Preferred cross-border purchasing device:

Desktop/laptop/notebook, 77%

URL country code:

.be



Official languages:

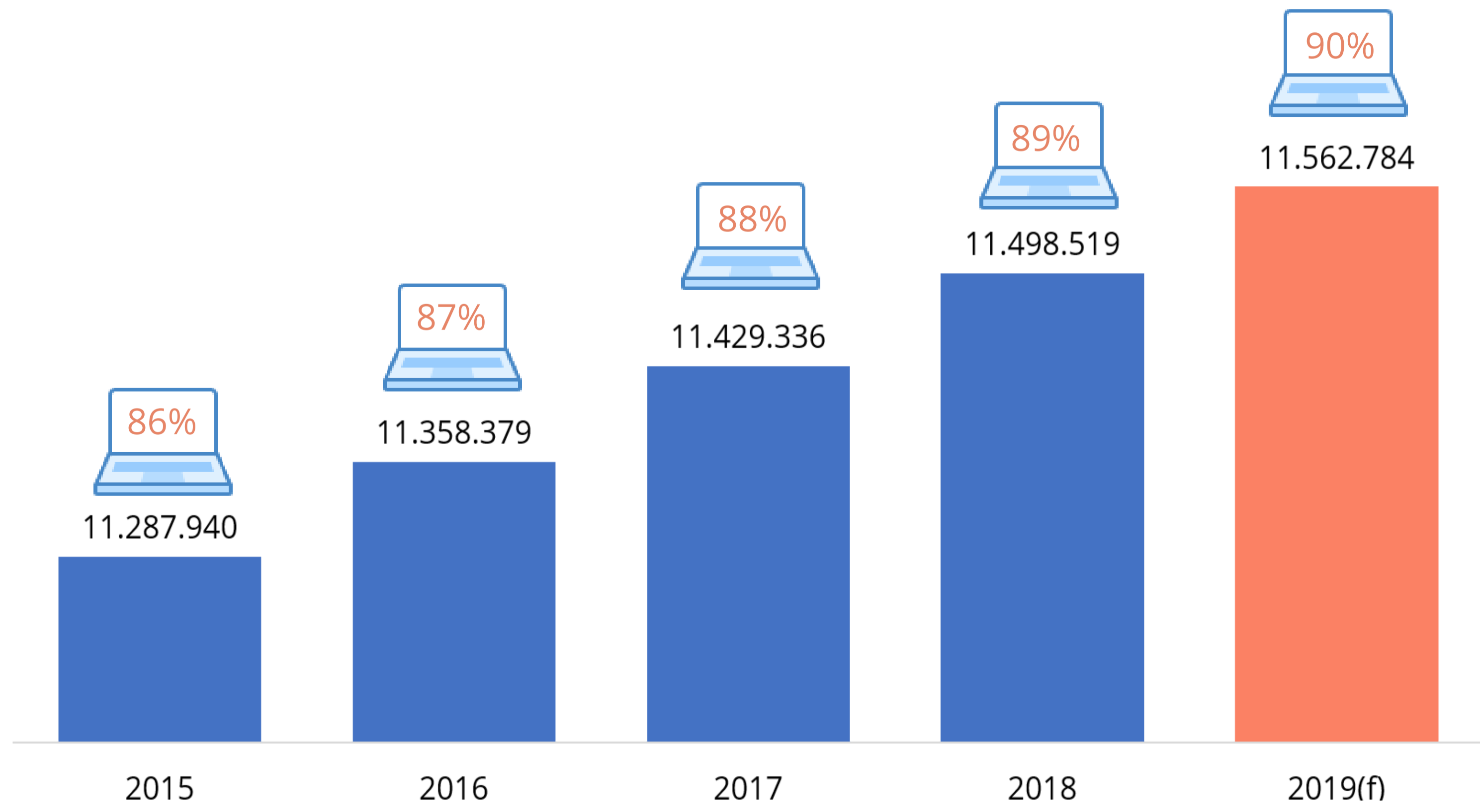
Dutch, French and German



Most of the population is between 25-54

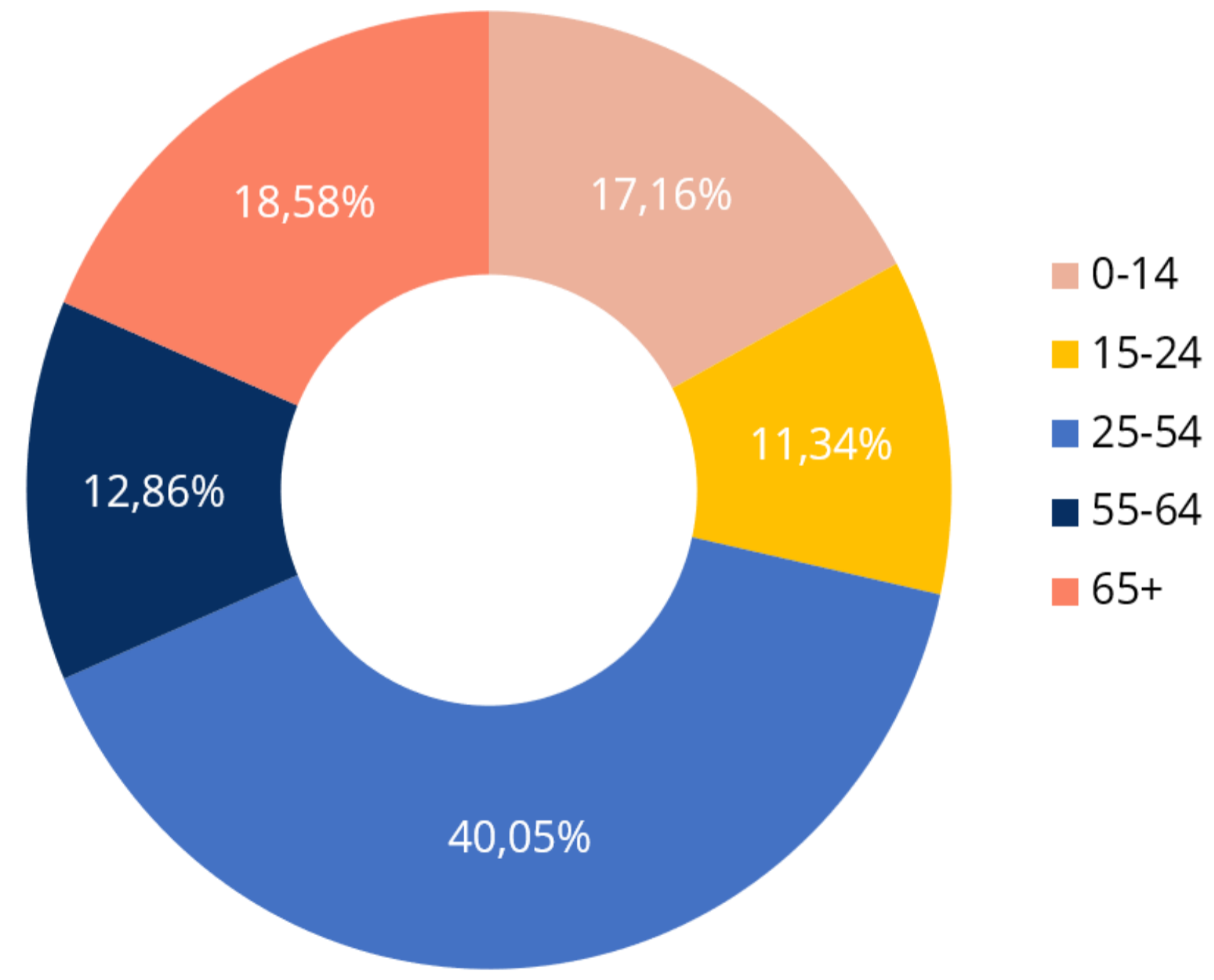
Population & Internet Penetration

Total population (in millions) & Share of the population using the Internet, 2015-2019(f)



Age Structure

Share of population in select age ranges, 2018



GDP expected to increase in 2019

Gross domestic product (EUR)

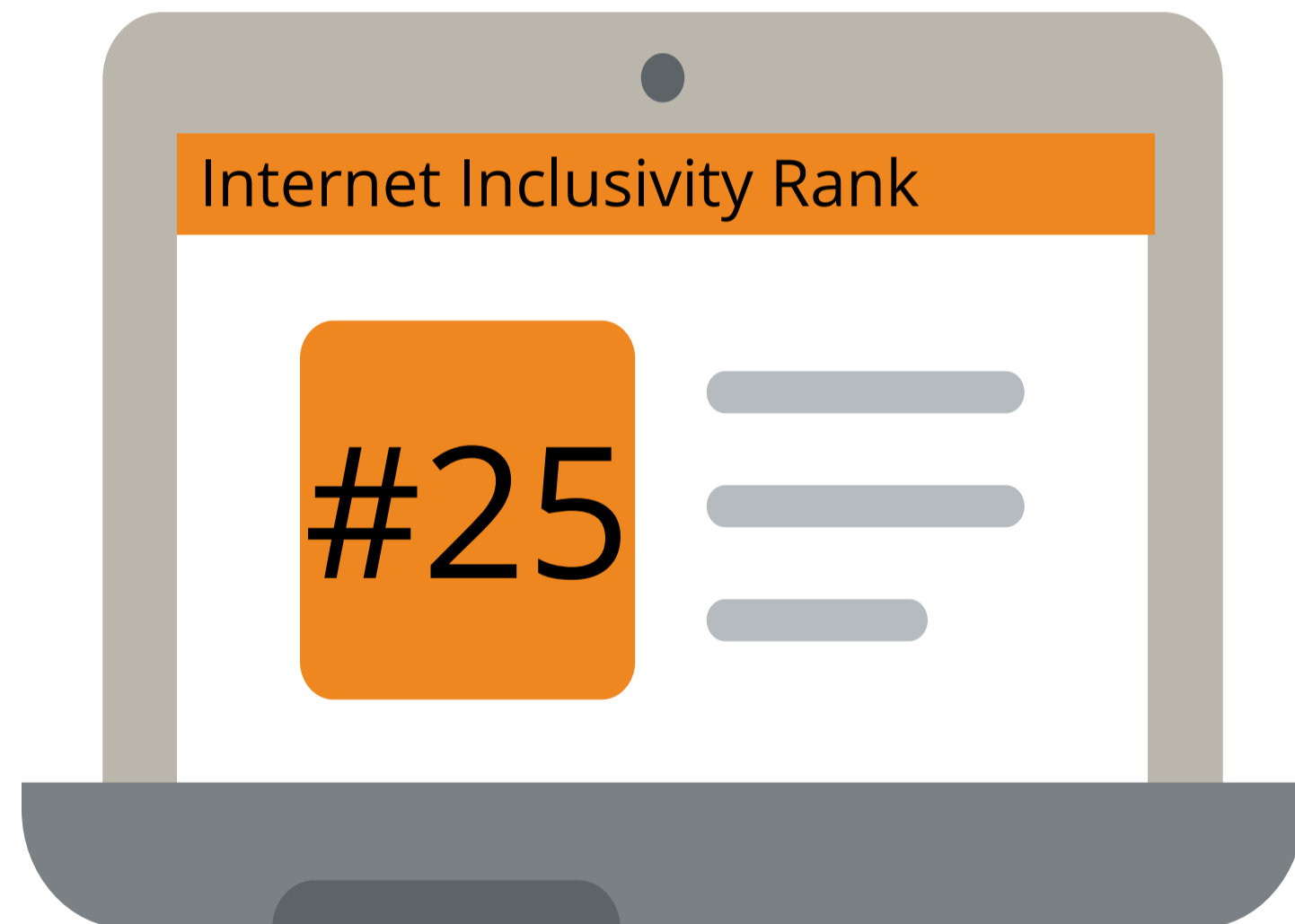
GDP, GDP per Capita & GDP Growth Rate, 2014-2019 (f)

YEAR	GROSS DOMESTIC PRODUCT (GDP), BILLIONS OF EUROS	GROWTH RATE YOY	GDP PER CAPITA
2014	EUR 404	1.35%	EUR 36,200
2015	EUR 410	1.40%	EUR 36,525
2016	EUR 416	1.47%	EUR 36,818
2017	EUR 423	1.71%	EUR 37,312
2018	EUR 431	1.89%	EUR 37,820
2019(f)	EUR 438	1.50%	EUR 37,882

#2 Infrastructure & Logistics



Belgium ranks 25th in the Internet Inclusivity Index



Internet Inclusivity Index

The Index outlines the current state of Internet inclusion across 86 countries, and aims to help policymakers and influencers gain a clearer understanding of the factors that contribute to wide and sustainable inclusion.

Readiness

This category examines the capacity to access the Internet, including skills, cultural acceptance, and supporting policy.

Affordability

This category examines the cost of access relative to income and the level of competition in the Internet marketplace.

Relevance

This category examines the cost of access relative to income and the level of competition in the Internet marketplace.

Availability

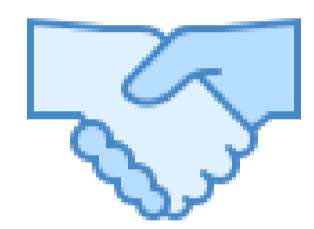
This category examines the quality and breadth of available infrastructure required for access and levels of Internet usage.

Belgium has dropped in some indices, however still ranks high for LPI



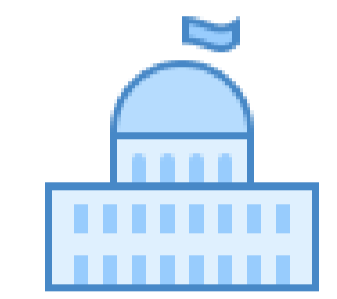
Logistics Performance Index

The LPI overall score reflects perceptions of a country's logistics based on, among other things, efficiency of customs clearance process, quality of trade and ease of logistics services.



Ease of doing Business Index

A high ease of doing business ranking means the regulatory environment is more favorable for the starting and operation of a local firm. The rankings are determined by sorting the aggregate distance to frontier scores on 10 equal topics.



E-Government Development Index

The UN's E-Government Index provides a comparative assessment of the e-government development of UN Member States. Important factors contributing to a high level of e-government development are concurrent past and present investments in telecommunication, human capital and provision of online services.



#3

Ecommerce Landscape



B2C ecommerce turnover

B2C Ecommerce Turnover & B2C Ecommerce growth rate
2014 - 2019(f)

E-GDP
Between 2014 - 2019(f)

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E-Shopper Penetration, E-Shopper Spending

E-Shopper Penetration

Share of the population having shopped online, 2015-2019(f)

E-Shopper Spending

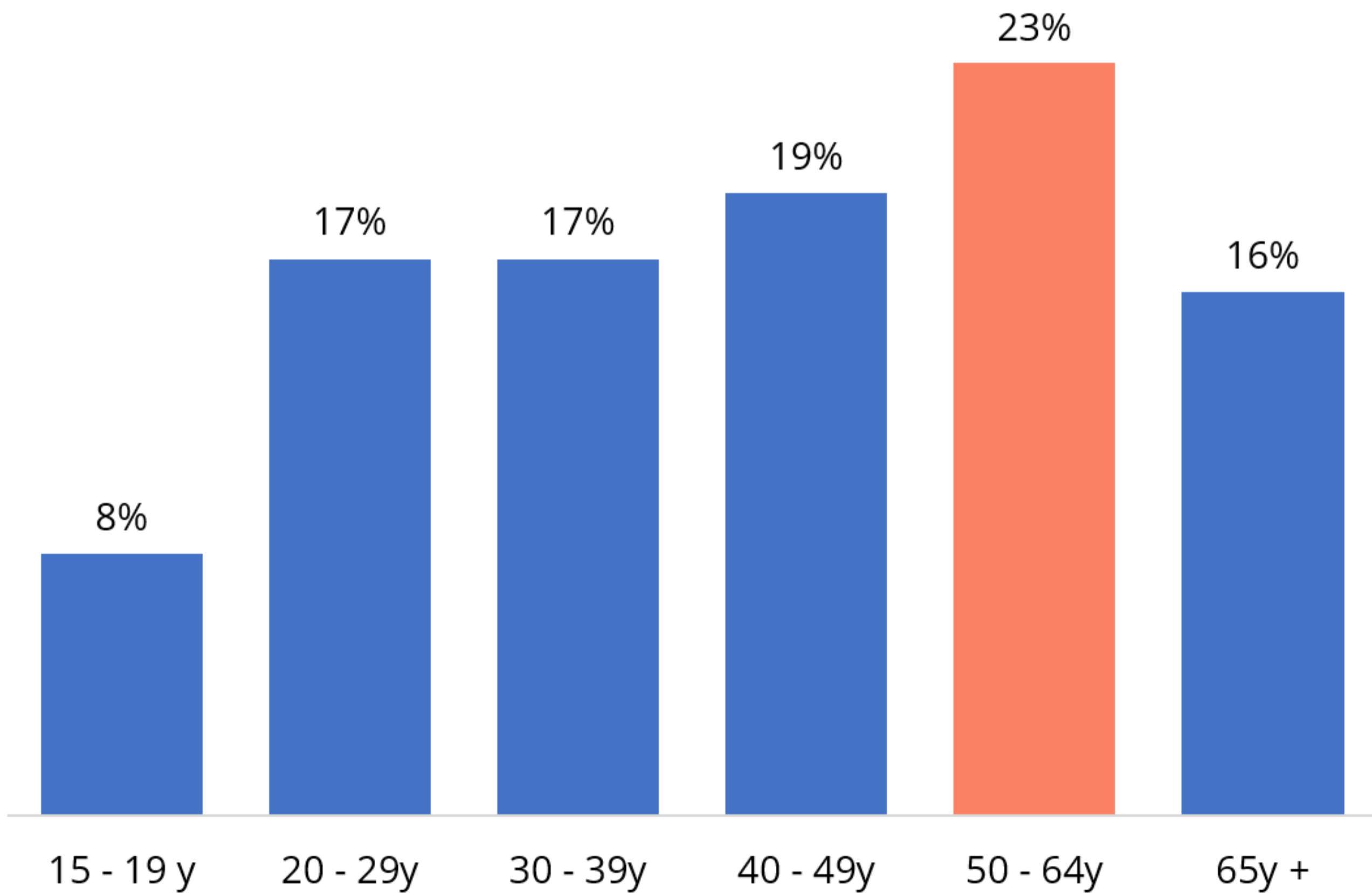
Annual amount spent per e-shopper (Euros), 2015-2019(f)

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23% of online buyers in Belgium are between 50 and 64 years old

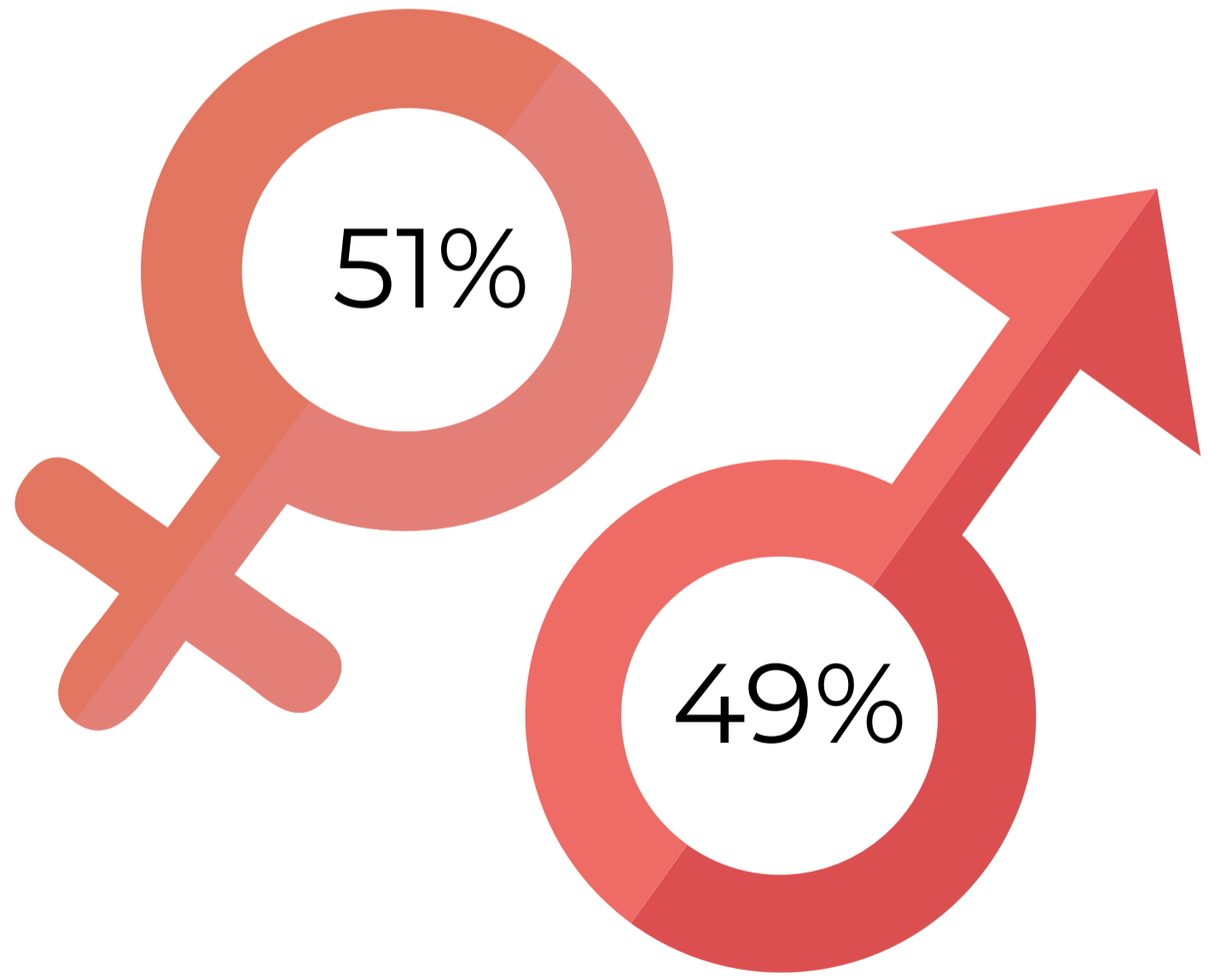
E-Shoppers: Age

Distribution of buyers by age, 2018



E-Shopper: Gender

Distribution of buyers by gender, 2018

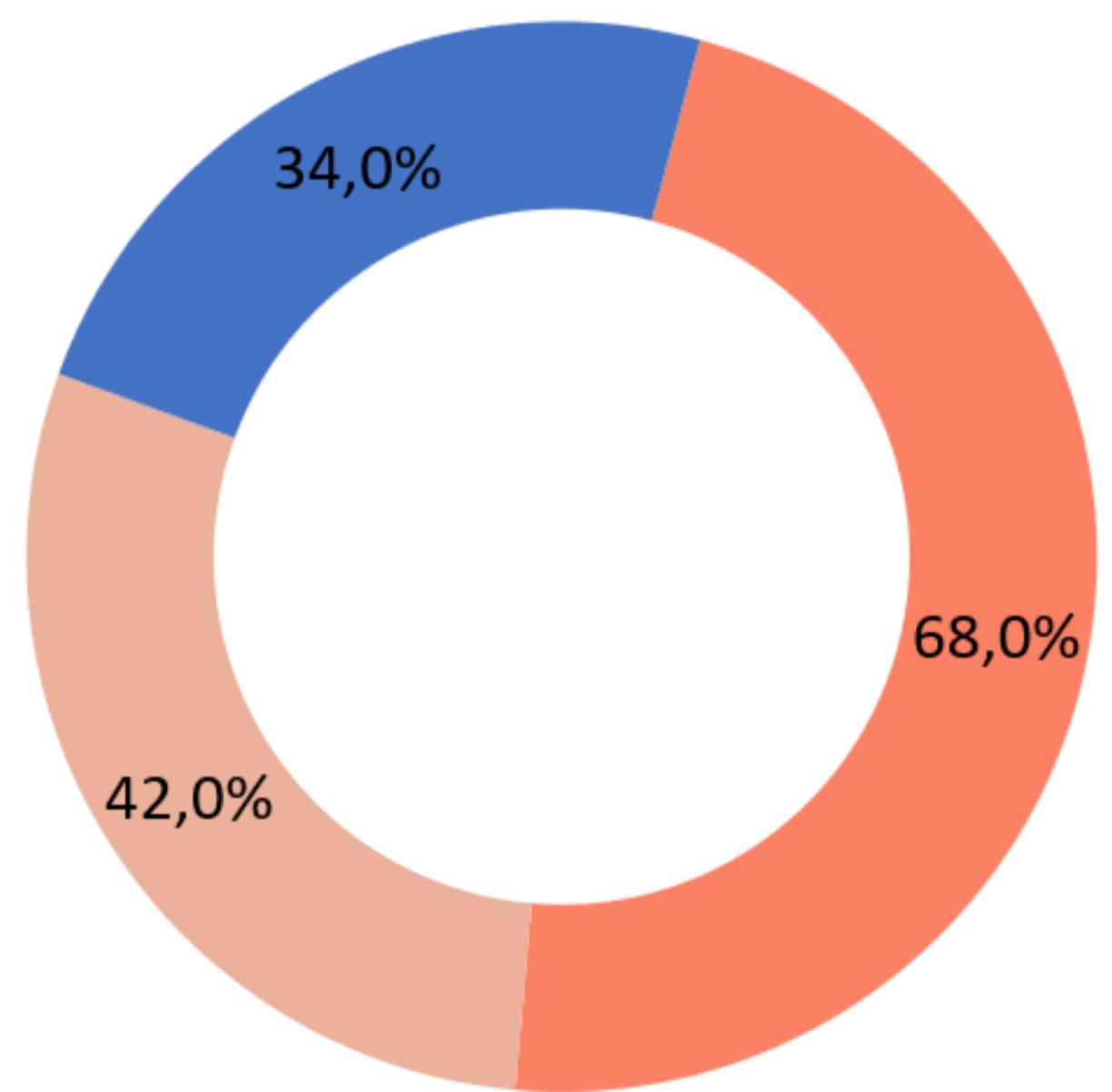


Payment Method Preference, Consumer Spending

Payment Method
Payment method preference/use, 2018

Consumer Spending
How much did you spend online in the past month? (Euro), 2018

■ Bancontact ■ Credit Card ■ PayPal



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Top Online Retailers

Top Retailers

Leading online retailers based on revenue (millions of Euros), 2018

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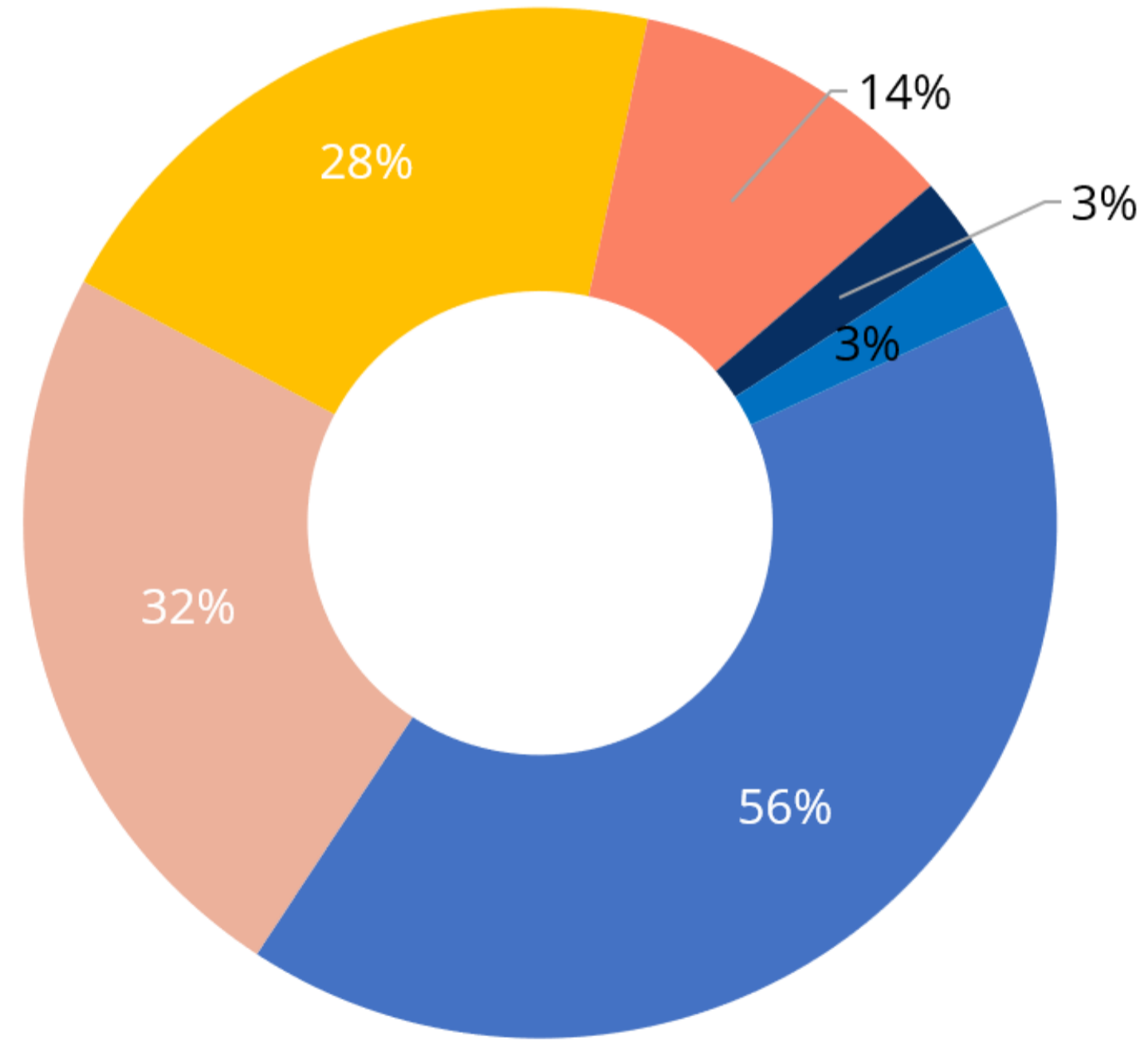
Delivery Methods, Device usage for online purchase

Consumer Preference: Delivery Methods
When you order a product online, how do you prefer to have it delivered?, 2018

Consumer Preference: Cross-Border Purchasing
Preferred device for cross-border purchases among online shoppers, 2018

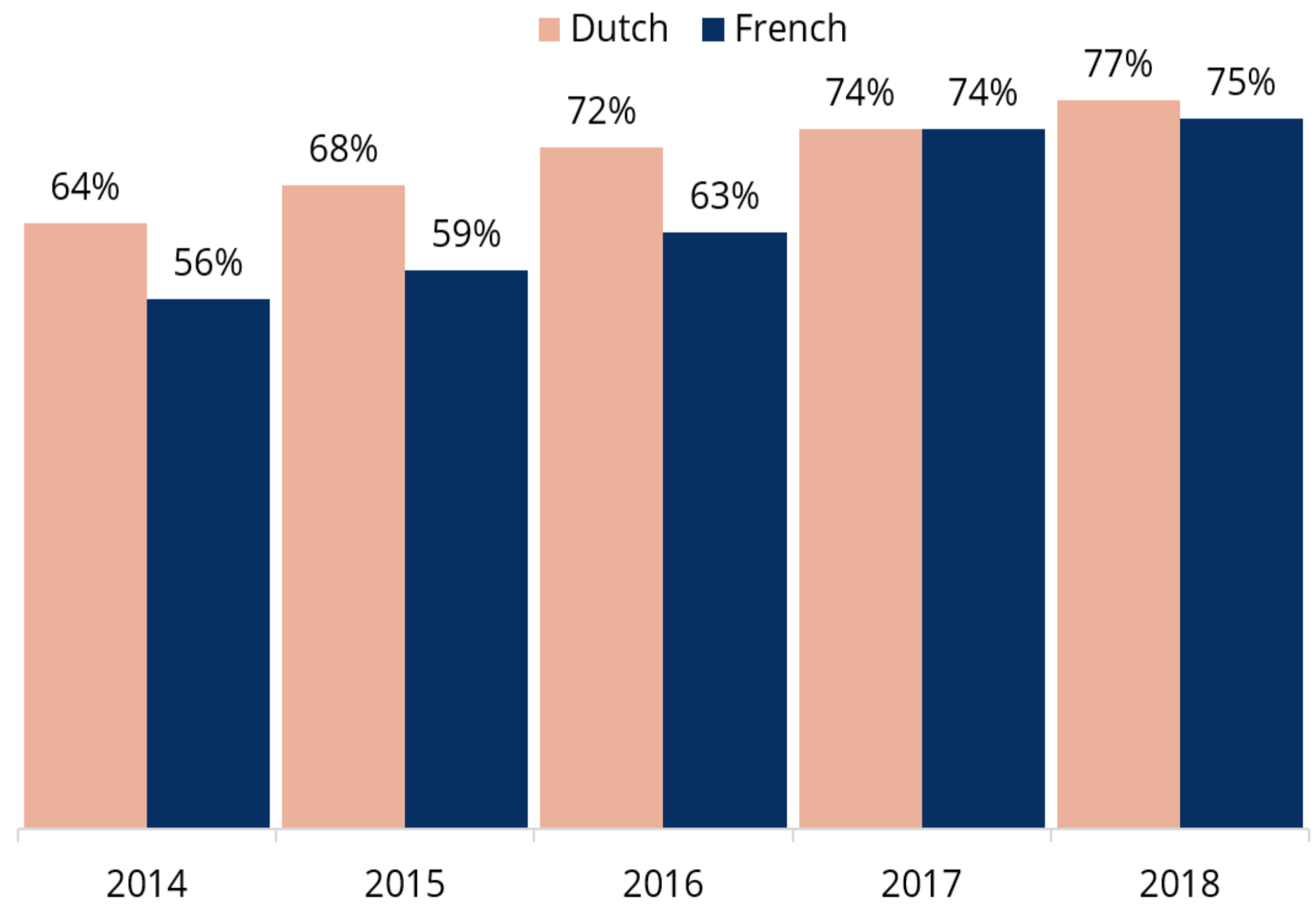
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- Laptop
- Desktop
- Smartphone
- Tablet
- Online in the shop
- Other device

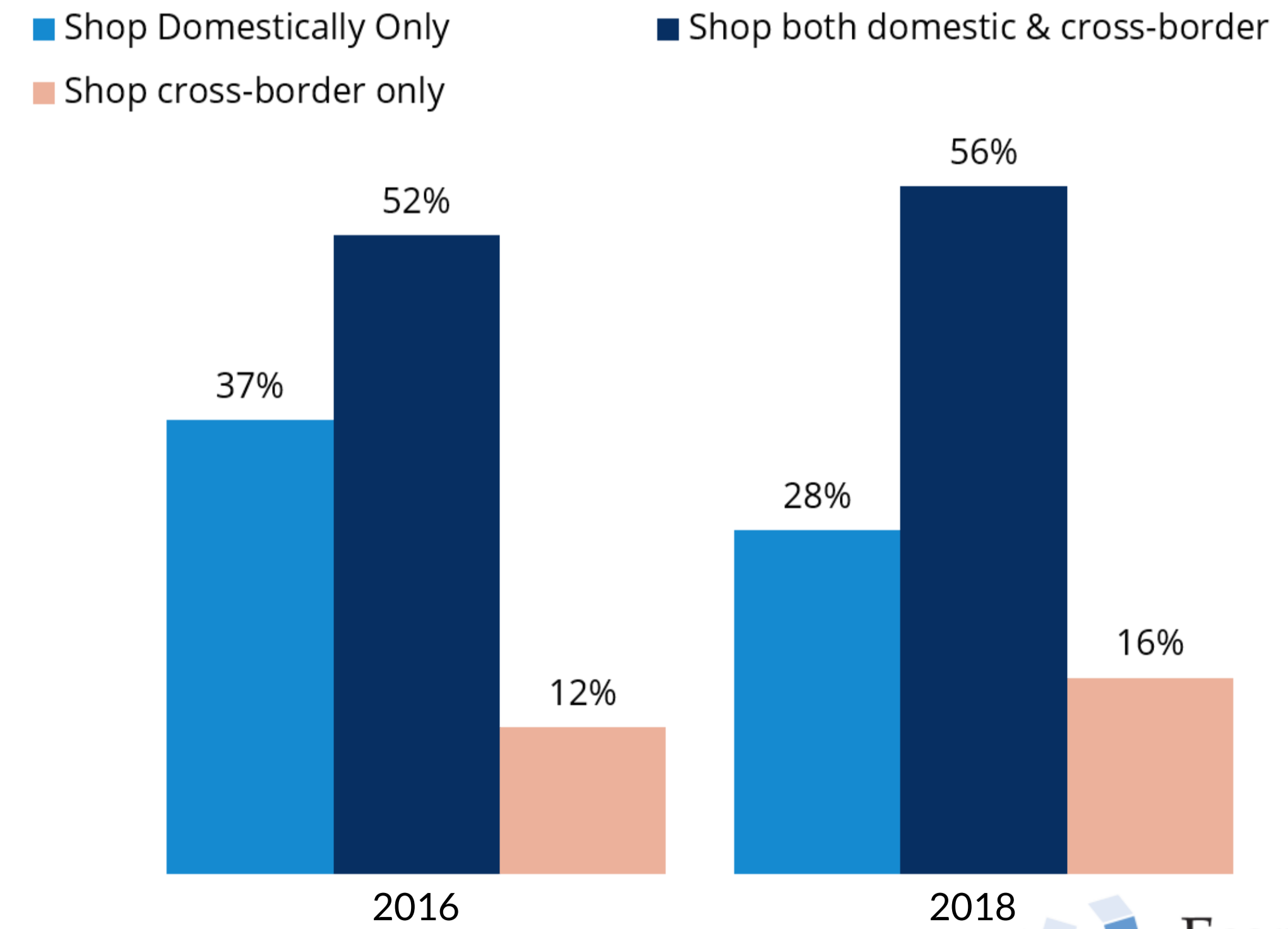


Most consumers shopped both domestically & cross-border in 2018 (56%)

Consumer Preference: Webshop Language
Share of online purchasers on French/Dutch webshops, 2014-2018

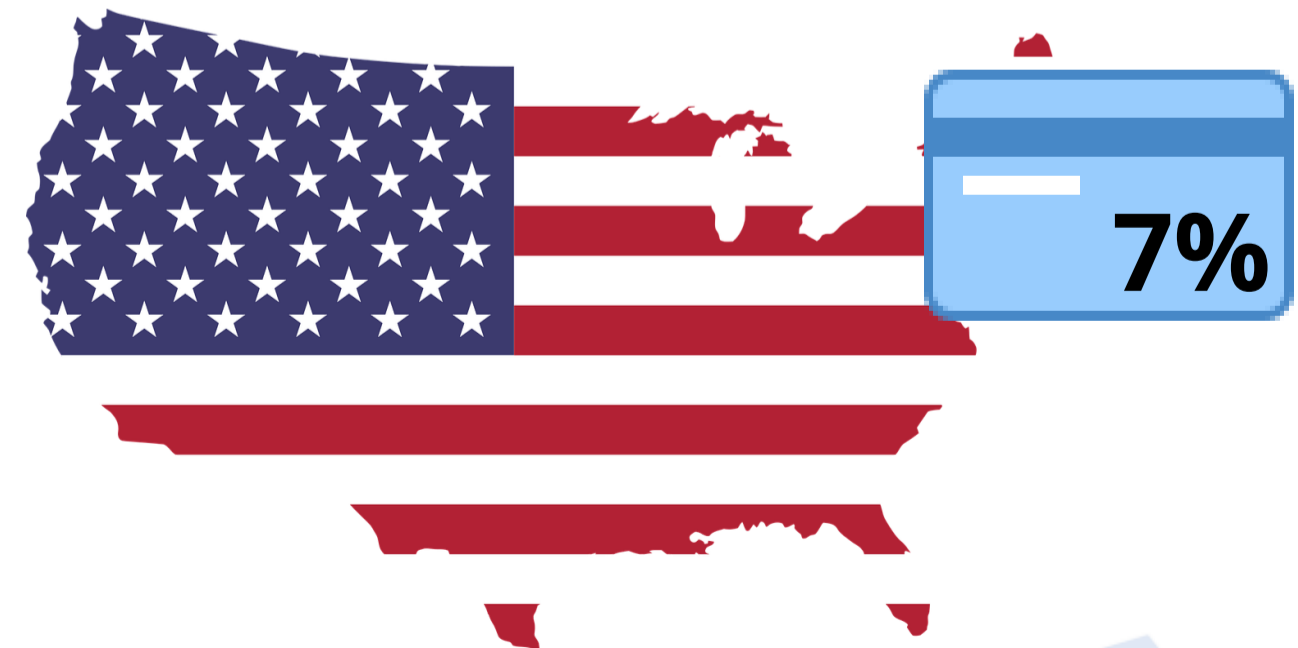
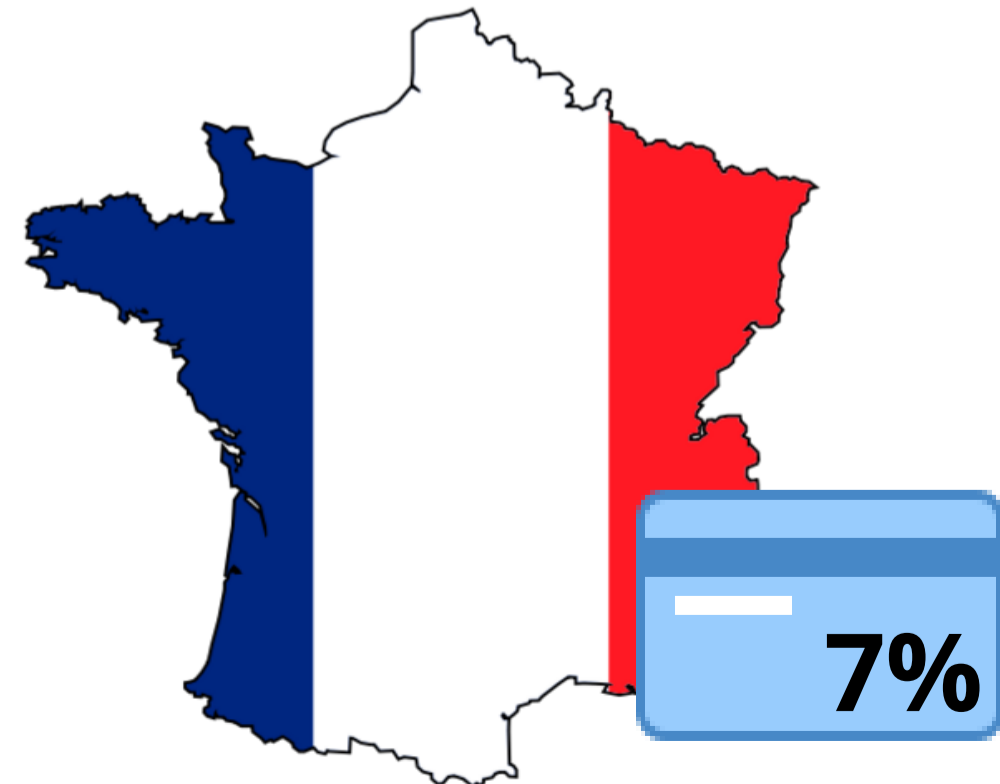
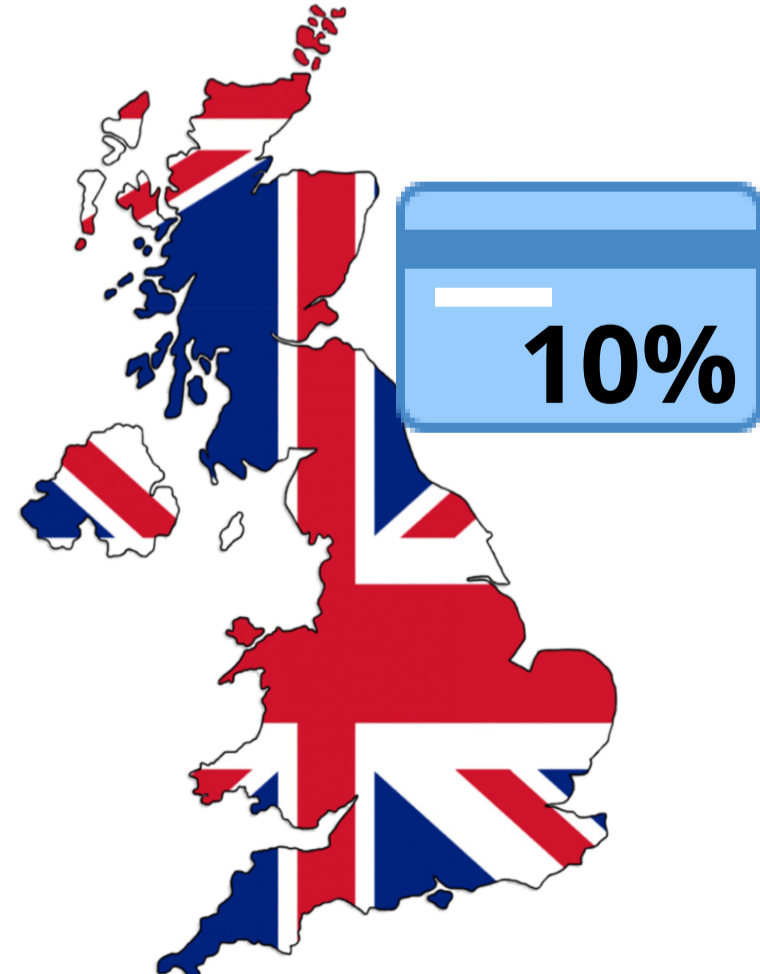
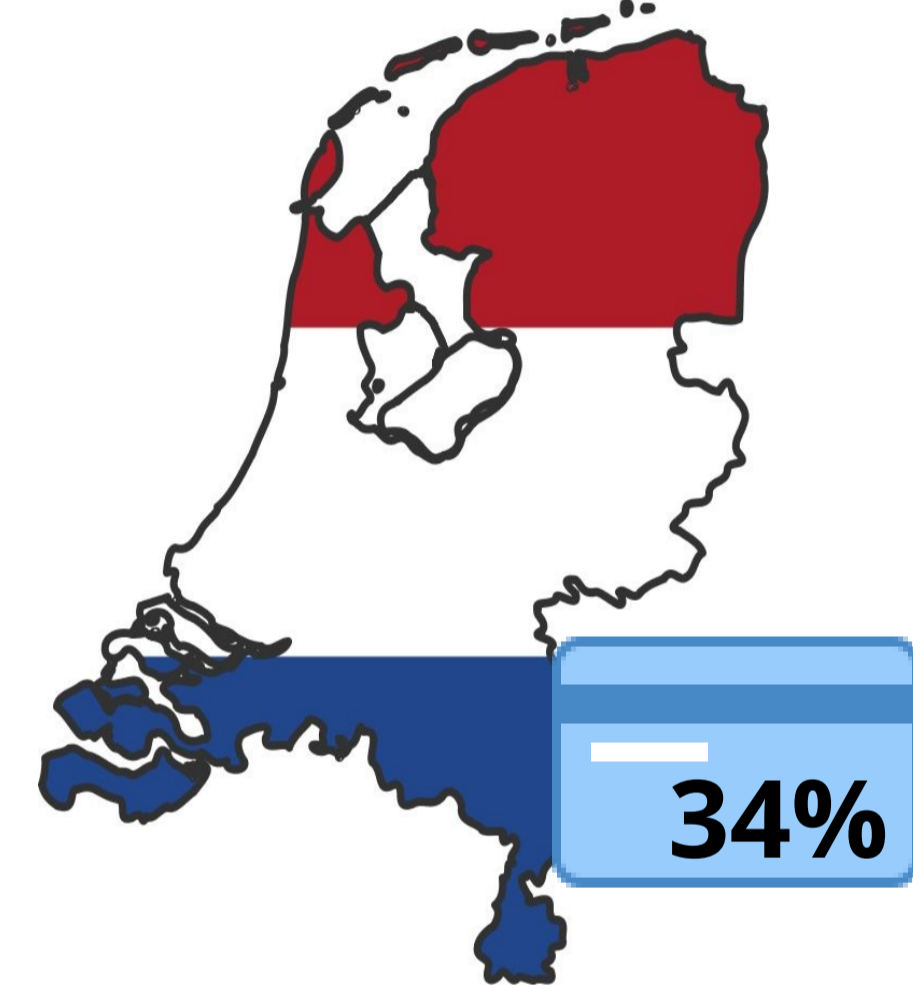


Distribution of Cross-Border/Domestic Ecommerce
Share of consumers who have purchased cross-border and/or domestically, 2016 & 2018



Belgian consumers mostly buy from the Netherlands, followed by China

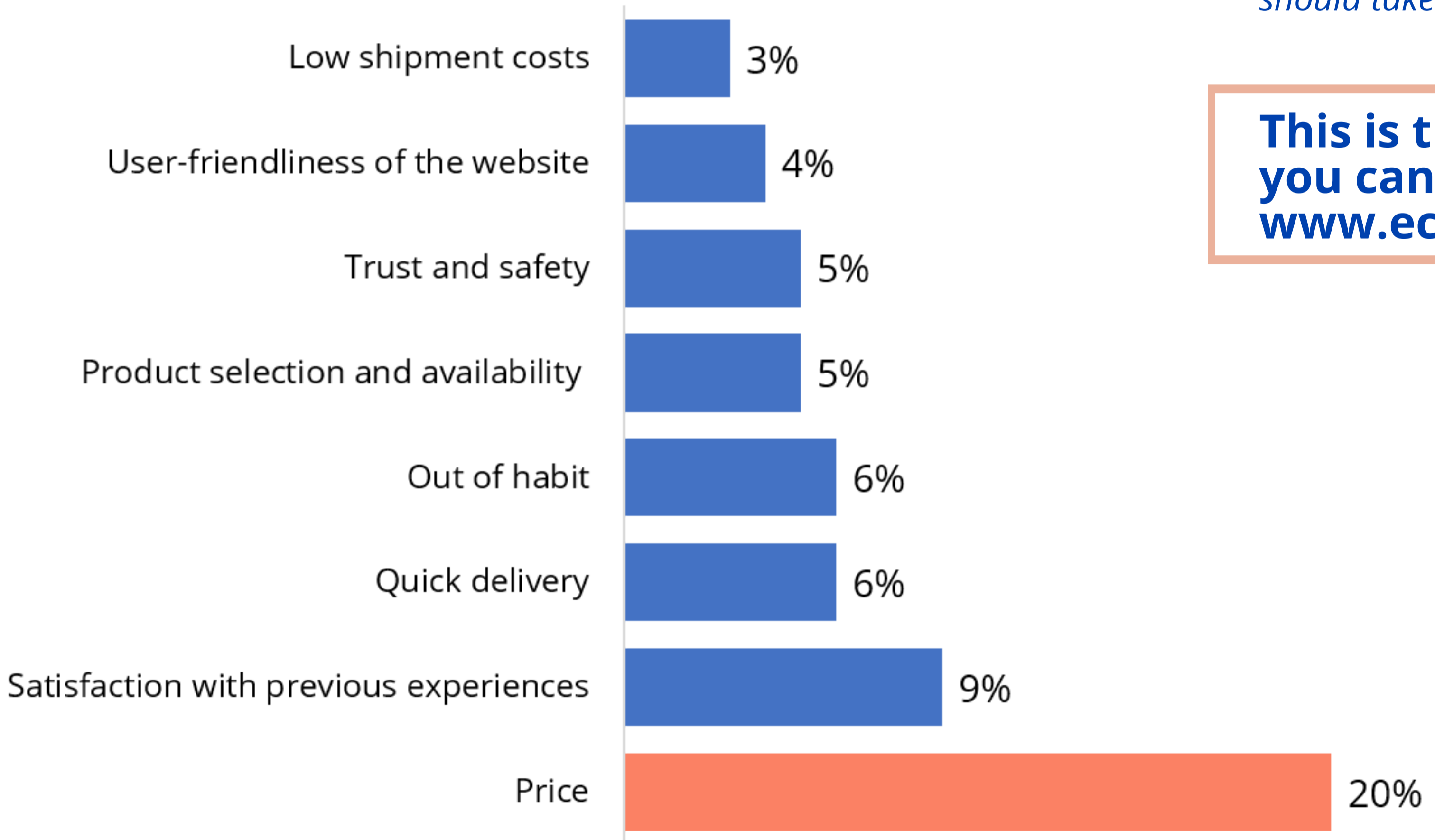
Cross-border Online Shopping Destinations
Top countries by share of purchases originating from Belgium, 2018



Price is the leading consumer driver for e-commerce websites

Leading Drivers for E-Shoppers

Leading drivers to purchase online, by share of e-shoppers, 2018



Consumer Preferences: Time of Delivery

When ordering online, what is the maximum delivery time it should take for you to receive the product?, 2018

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Top 5 categories, Share of E-commerce

Top 5 Product Categories

Share of the population having purchased at least once online in each category, 2018

Share of Ecommerce: Services & Products

Share of total online purchases by services and products, 2018

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#4

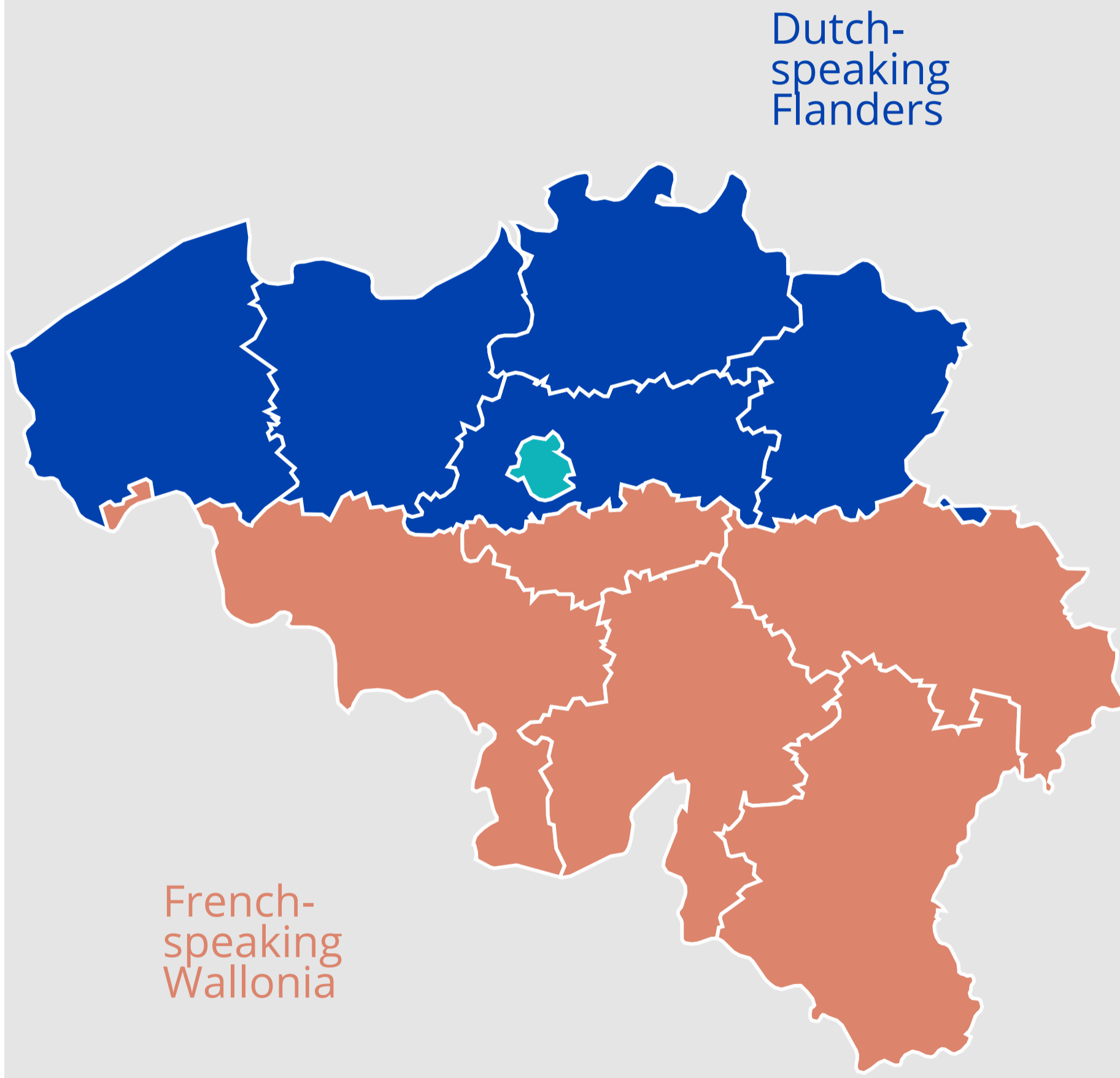
Case Study: Multilingual webshops





Correct language localization: a must-have

Belgium is deeply divided into two linguistic groups: Dutch-speaking Flanders and French-speaking Wallonia. The northern part of Belgium, Flanders, is more connected with the Netherlands, whereas Wallonia more with France. This division is not only geographical or cultural, but also related to webshops.



Belgium came relatively late in embracing ecommerce, leading to a large flow of consumers shopping online mainly abroad, especially at Dutch online shops. Consequently, larger Dutch online retailers began opening webshops using the domain '.be', focused on attracting Belgian consumers.

In Belgium, around 5 million people buying online are Dutch-speaking Flanders, while almost 3 million are French-speaking Wallonian. Belgians prefer webshops from neighbouring countries, which one depending on the language offered on the webshop.

How many languages should you offer on the Belgian version of your website?

Correct language localization seems a 'must-have' to get the best results, i.e. higher conversion and turnover.

The cultural division makes it difficult for online retailers hoping to operate in Belgium and conquer the hearts, minds and wallets of its inhabitants. There is no uniform profile of the Belgian online buyer, therefore, retailers must focus on the multilingual status of the country being the key to master the Belgian ecommerce market.

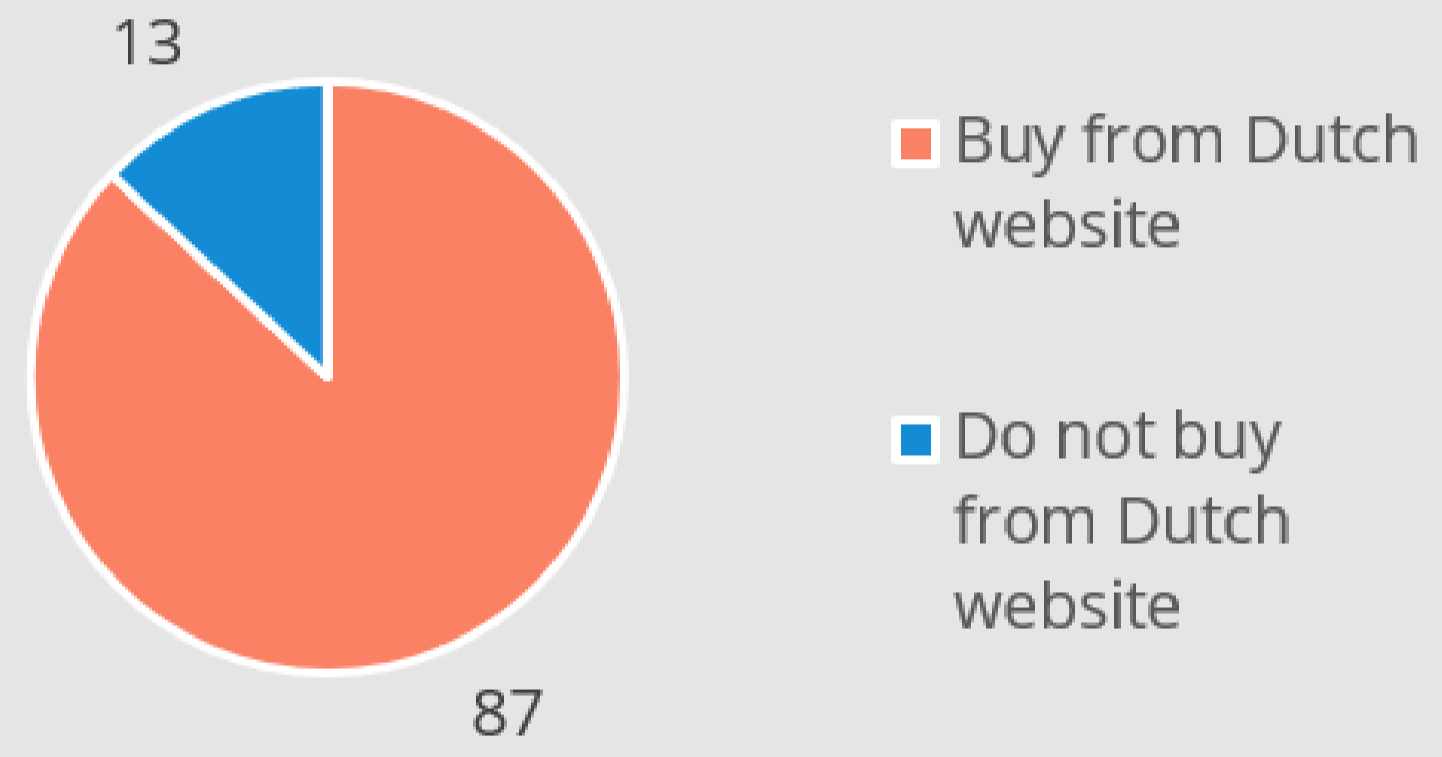


Language localization and trust

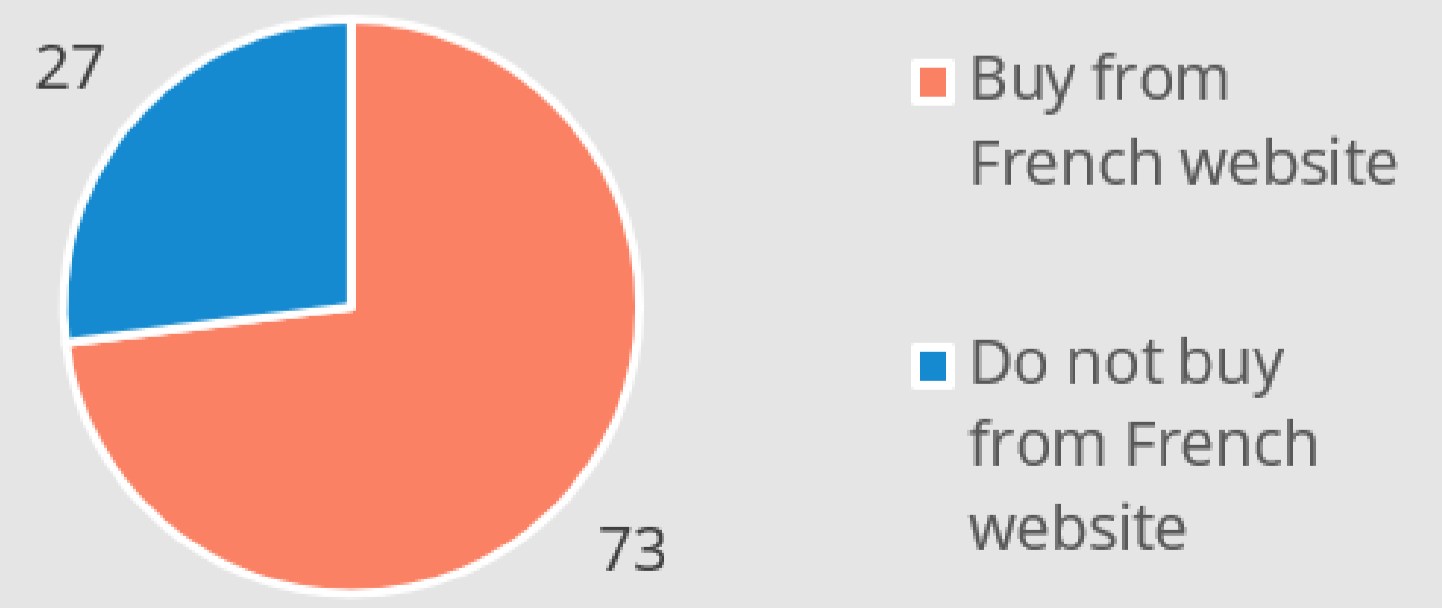
CASE STUDY

Dutch-speaking, as well as French-speaking customers are willing to buy from neighboring countries. If you want to be competitive, you must create regular, quality content translated into the languages Belgians prefer.

Dutch-speaking customers



French-speaking customers



A correct language localization can increase the trustworthiness of your webshop for customers. Belgians, it would appear, tend to trust webshops in their own language a bit more, as they are more likely to buy from them.

That said, customers are rarely a 'one issue' bunch, and studies have shown that online shoppers also prefer to shop and purchase in their native language.

These two combined issues for consumers make it even more important to know where you are selling and who you are selling to when you go across the border.

When entering Belgium, geography and language are as important as any other aspect of your business plan, so be sure to include a thorough analysis of both for success in the market.

#5

Expert Opinions & Advice



**Mark de Bruijn**

VP, Head of EMEA & MEE Marketing,
SAP Customer Experience

Mark is a modern, data-driven marketer with a passion for digital, innovation and everything related to customer experience. For the past 8 years, Mark has taken on various roles in marketing, business intelligence and predictive analytics.

In addition, he was affiliated with Avans University as a lecturer. Mark's greatest pleasure is sharing his vision and knowledge with others, as he is a regular speaker at events across the world.

Q: Looking back at the GDPR implementation from 2018, how do you feel this has impacted the European (and wider) ecommerce industry?

A: When I look back at the months just before the GDPR implementation, then the first thing that comes to mind is how many companies were attending our GDPR readiness events and how much content was written about that topic. I felt this was a turning point for brands to really start thinking about the customer experience, and for customers to be even more aware about the value of their personal data. I'm happy about the fact that, now, brands are putting a lot of thought into shaping meaningful experiences for their customers, finding smart ways to treat customer data and giving them something in return, at every step of the buying journey.

“...[find] smart ways to treat customer data and giving them something in return.”

Q: The debate still rages regarding privacy and our online shopping experiences.

Personalisation is core to many ecommerce strategies. Do you think these two sides can coincide?

A: Absolutely. Many consumers expect a personalised customer experience and are aware that, in return, they will be sharing some data about themselves. Technology is also developing really quickly, so even with minimal data it's already possible to deliver a personalized experience by instantly responding to customers' signals. In the end, I believe it's about making clear what it is that customers get in return. And it's about asking for it at the right time. For example, when visiting a web shop, most people are not willing to leave their mobile phone number. But at the point of ordering a product, they might feel more confident to do so, as it may help with the delivery. It's not even a question if privacy and personalisation can exist together, they are fully connected.

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Q: Where do you see voice search in the customer journey in the upcoming year?

A: Let's state some simple facts: voice shopping is expected to increase twenty-fold by 2022, so it is already gaining a preponderant place in the customer journey. Connected to this, mobile commerce is expected to take nearly half of all ecommerce sales over the next two years or so.

Those are clear signals for ecommerce retailers and brands to put the customer at the center of their strategies, by instantly delivering the answers that consumers are looking for any time they wish to have an interaction with them, no matter the device, channel or type of search. The ability to deliver solutions when consumers ask for them will be key to build long-term, trusted relationships.

Q: What topic or area of ecommerce has piqued your interest this year, and why?

A: Well, besides all the great technology, ethical commerce is a thing now for more and more consumers. Think about very detailed product information, but also packaging, shipping distances and if a brand is socially responsible. Consumers want to feel good about the products they buy and I'm confident that ethical commerce will be a huge focus in the upcoming years. In the end, it is all about building a trusted relationship between brands and consumers.

“...mobile commerce is expected to take nearly half of all ecommerce sales over the next two years or so.”



Igor Corvers

International Business Development Manager, Osudio Belgium

Igor Corvers is International Business Development Manager at Osudio, one of the leading E-business agencies in Europe. Igor started his journey in the IT and Digital field in 1999. Since 2007, Igor has been involved in numerous ecommerce, PIM and UX sales consultancy projects.

Osudio is working together with companies like Carlsberg, Philips, Intergamma, Shimano, Miele, Goodyear, HansGrohe and many more.

Q: What are your top 3 tips for localizing to a new market such as Belgium?

A: There are a few elements that we experience as crucial for localizing your business to the Belgian market.

First, make sure that you are aligned with local payment methods. Bancontact is still with 68% the most used payment method closely followed by a credit card (42%). The third most popular payment method is Paypal (34%).

Secondly, offer convenience to your customer by providing services like: buy online – pick up in store; provide physical options to (easy) send returns, offer track and trace capabilities, etc.

As a final tip, I would advise merchants to make sure their product descriptions and content is localized to Flemish and French. This for sure will benefit conversions, lower return rates and increase your search engine rankings.

Q: How will the balance between online and offline retail shift In 2019 within Belgium?

A: According to some recent studies almost 90% of the Belgian inhabitants older than 15 bought at least one item or service online in 2018. The figures calculated by GFK show that the number of online purchases grew by 12% in 2018 to 97 million. This represents spending of about 10.6 billion Euro in 2018.

“...offer convenience adding elements to your customer: buy online – pick up in store; provide physical options to (easy) send returns, offer track and trace capabilities, etc.”



OSUDIO
BY SQLI

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Overall this would mean that about 17.8% of all B2C spending is done online. Figures like this clearly show there is a year by year shift towards shopping online. We strongly believe that this new shopping reality also provides retailers with a great opportunity to truly embrace the omnichannel paradigm.

Q: Which part of the omnichannel experience can be improved to most effectively boost ecommerce in Belgium?

Nowadays we still talk too much about ecommerce on itself. As we know that consumers commonly require 6 – 8 touchpoints before purchasing a product or service, it's crucial to approach the customer in a 360° way. Make sure your customer has a seamless experience between online and physical stores.

Start plotting your buyer persona's (make sure you have defined some) on customer journey maps to gain insights on the behaviour of your customer.

Once you have identified delighters and pain points in the customer journey you can act on those items to better engage with your customers.

“It's crucial to approach the customer in a 360° way. Make sure your customer has a seamless experience between online and physical stores.”



ASENDIA
BY LA POSTE & SWISS POST

Alain De Weerd

Key Account Manager,
Asendia Belgium

Alain De Weerd has been working for nearly 10 years for Asendia Benelux with an expert focus on the French Market.

Helping Belgian B2C businesses grow across borders with ecommerce & mail solutions.

Q: What effects would Brexit have on ecommerce logistics to and from the UK to Belgium?

A: All ecommerce companies that are currently active in international trade going in and out of the UK will feel the smashing effects from the upcoming Brexit, whether it will be “soft” or “hard”. The effects will be felt the hardest in areas of trade and customs that are modified, taxation and contracts that will be adapted, as well as scenarios for future investments which will be revised or will be moved out of the UK into Europe mainland. Therefore Asendia has put together a practical ecommerce Brexit guideline in shipping from and to the UK with a clear view on all necessary formalities. This guideline can be provided upon simple request.

Q: What advantages do you see in pushing cross-border into Belgium?

A: The ecommerce market in Belgium is rapidly growing, mostly in the food, textile and

electronics industries. Consequently, the Belgian market is considered one of the most attractive for ecommerce activities, growth potential and infrastructure. Setting up cross-border into Belgium will give companies access to a network with more than 70% of the EU’s internet sales activity. Belgium is surrounded by the most important e-markets of Europe like the UK, Germany, France and the Netherlands, which are only a small step away. So is our Asendia Benelux office which is situated in Eindhoven in the Netherlands, close to Belgium, Germany and France.

Q: What factors should be considered when shipping to customers in Belgium?

A: Not only the delivery options such as delivery with or without a signature, pick-up points or through the postal office, are to be considered, but also an adequate return policy is a crucial key factor in returning parcels. Asendia offers all of these options in order to optimize the supply chain for its customers.

#6 About the Report



About the authors



Sara Lone
Senior Research Analyst

Sara holds a Master in Public Policy from the University of California in the United States. Sara oversees the Ecommerce Foundation Research Team in its creation of country reports, custom research, content and webinars. Additionally, Sara presents on research around the world and advises stakeholders in furthering ecommerce globally.



Isabela Fàvero
Research Analyst

Isabela holds a Master in Development Economics from the University of Auvergne in France. At Ecommerce Foundation, she is part of the Research Team providing support in data analysis and the creation of country reports. Her interests and experience include analysing data as well as conducting policy evaluations.



Ludovica Quaglieri
Junior Research Analyst

Ludovica is pursuing a Master in Environmental Economics at Wageningen University and Research, The Netherlands. At Ecommerce Foundation, she is part of the Research Team collecting data and supporting the creation of reports. Her interests include sustainability and data analysis.



Shaun Packiarajah
Research Analyst

Shaun graduated with a Master's degree in Victimology and Criminal Justice from the University of Tilburg. He works for the Research Team at Ecommerce Foundation in creating research-related content and reports. His background is in policy creation and analysis, in addition to practical knowledge of business development.

Sources used in the report

The report could only be realized by consulting a great number of valuable sources. These were available in various countries and regions in Europe and around the globe. The wide variety of sources include public domain publications, blogs, websites, industry and financial specialist publications, regional and local news, annual reports, and press releases.

Sometimes the information sources are contradictory and sometimes different figures and data were given by varying sources within the same country, for example due to different definitions. In our reports we have mentioned the different sources, definitions and outcomes of such reports, studies and interpretations.

The report is based on information that we consider reliable, but we cannot vouch for it being completely accurate or complete, nor should it be relied upon as such. Opinions expressed are our current opinions as of the date of this report.

OUR SOURCES

Becommerce.be

IMF.org

CIA world Factbook

Statcounter

Statista:
Cross Border Online Shopping in
Belgium

United Nations

Ecommerce News

Becommerce.be

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