

Ecommerce Report: The Netherlands

2019



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 the Netherlands.

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.

We would also like to give a special thank you to **Thuiswinkel.org** and **GfK** for providing data for this report. It helped us make this the most comprehensive analysis of the Dutch ecommerce market we have ever conducted.

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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 1,000 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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.shop is a domain name for ecommerce. Short, meaningful and relevant, .shop allows ecommerce businesses to choose a brandable online address that instantly identifies ecommerce websites to online shoppers around the world. A .shop domain name can also help offline retailers and service providers to be discoverable online. For businesses, .shop domain names are a more powerful marketing tool and can be used to distinguish their corporate website from their online shop, and provide an enhanced user experience for their customers.



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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ABOUT THE REPORT

#1

NETHERLANDS OVERVIEW

AREA: 41,526 KM2

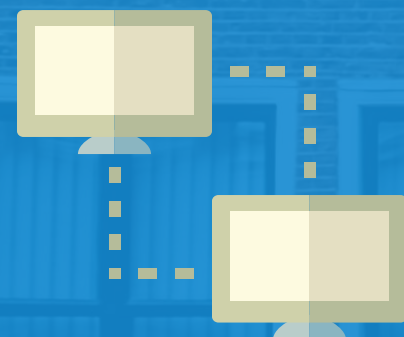
CAPITAL: Amsterdam

CURRENCY: Euro (EUR)



Government:
Constitutional Monarchy

Internet users (2018):
95%



Main device used for Internet:
Desktop, 55.4%

URL country code:
.nl



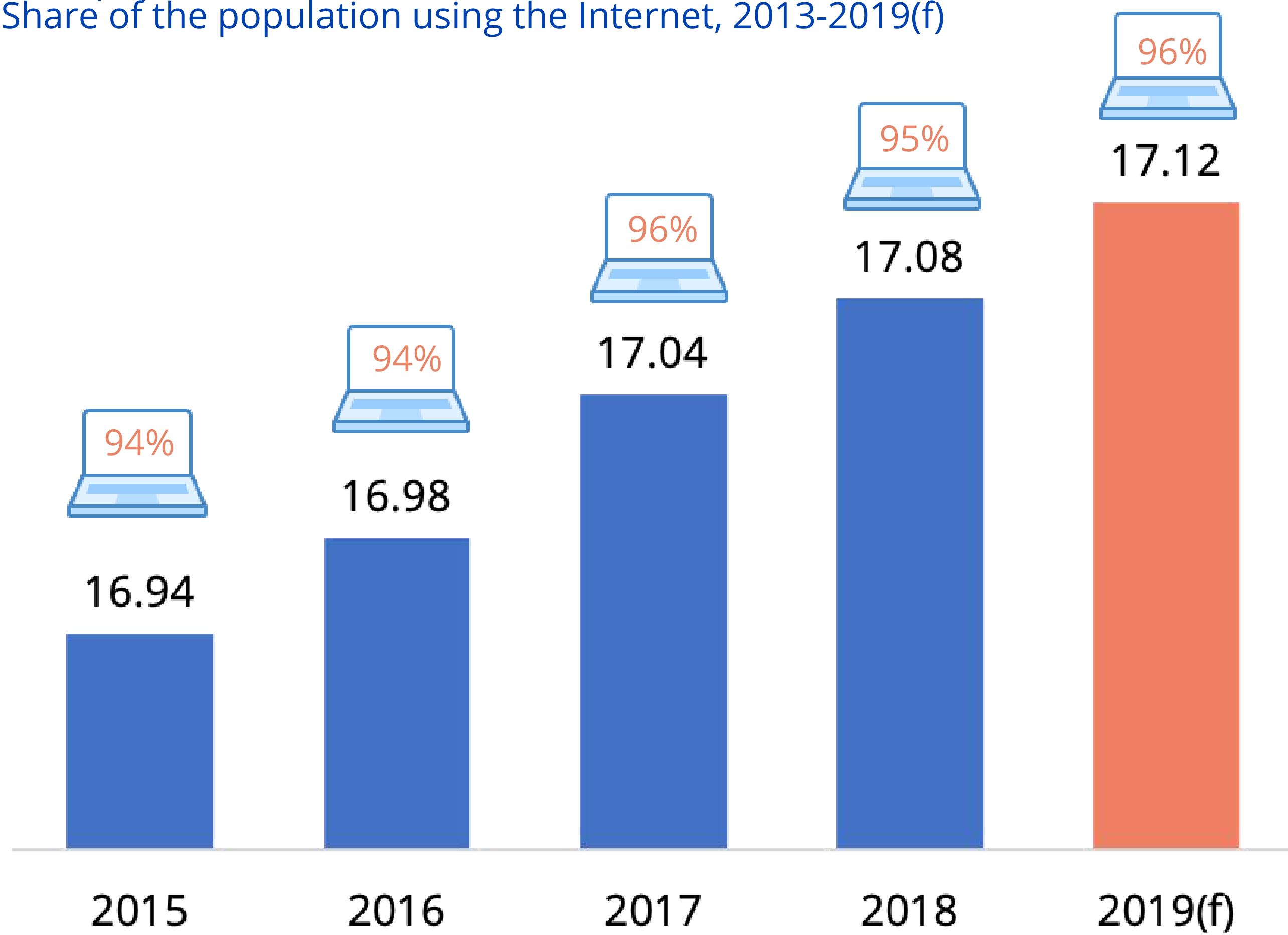
Official languages:
Dutch



Most of the population is between 25-54

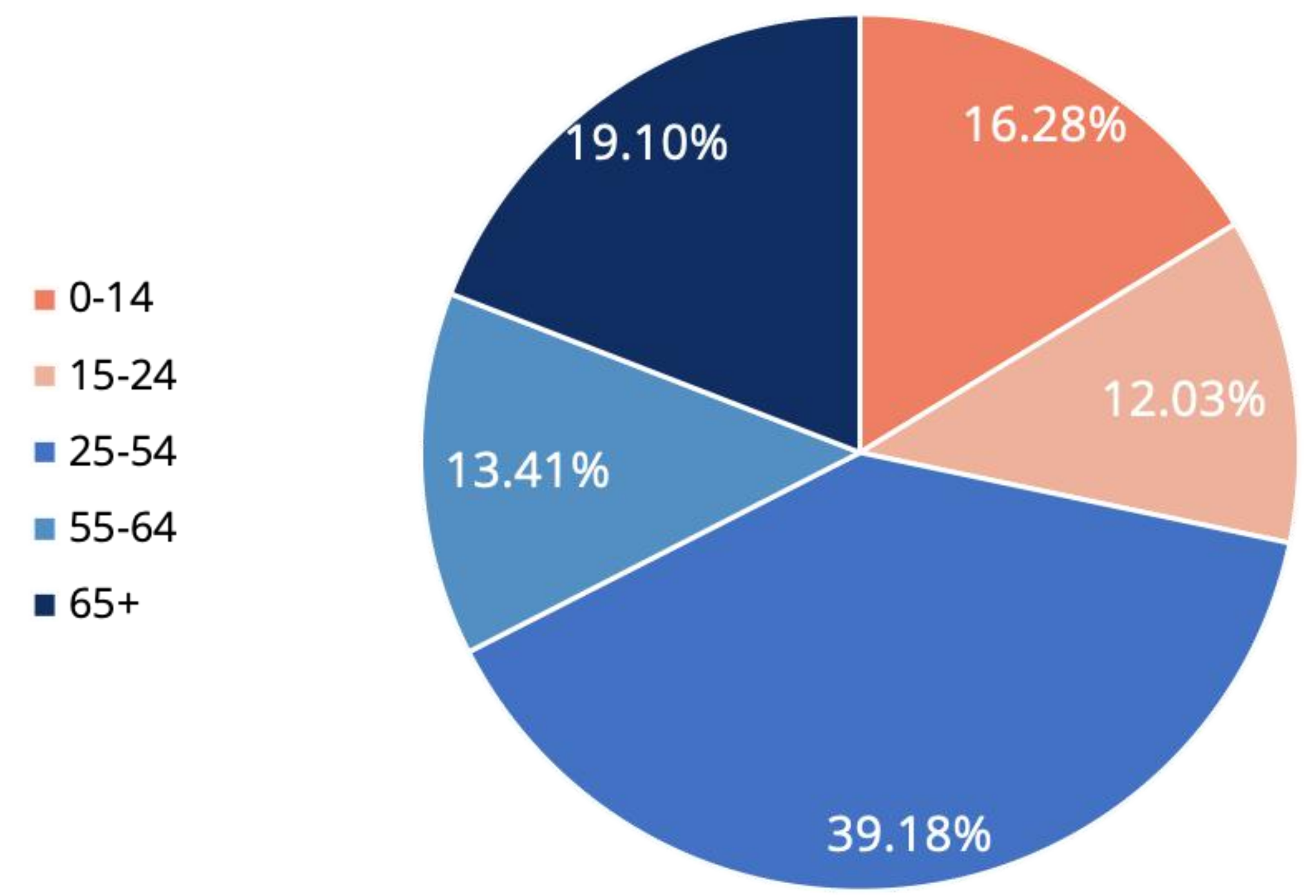
Population & Internet Penetration

Total population (in millions) & Share of the population using the Internet, 2013-2019(f)



Age Structure

Share of population in select age ranges, 2018



GDP expected to increase in 2019

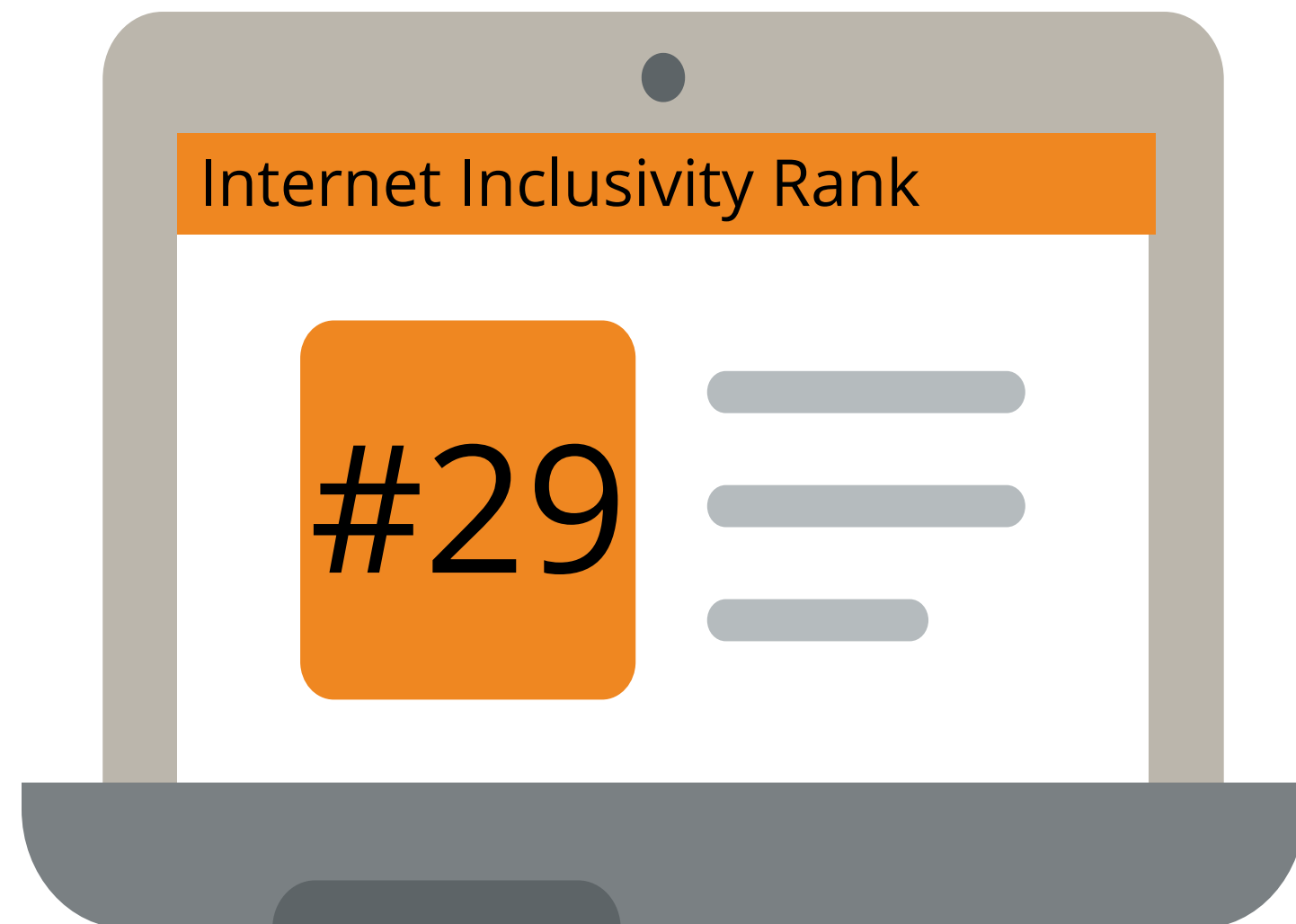
Gross domestic product (EUR)

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 663	1.57%	EUR 46,9
2015	EUR 676	2.04%	EUR 47,7
2016	EUR 697	3.01%	EUR 49,0
2017	EUR 718	3.03%	EUR 50,3
2018	EUR 740	3.08%	EUR 51,7
2019(f)	EUR 762	3.03%	EUR 53,2

#2 Infrastructure & Logistics

The Netherlands dropped in its Internet Inclusivity score to rank 29



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.

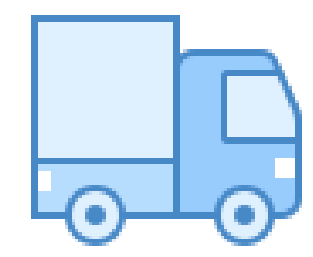
Relevance

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

Availability

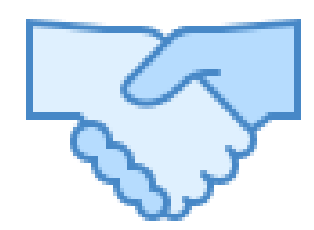
This category examines the quality and breadth of available infrastructure required for access and levels of Internet usage.

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



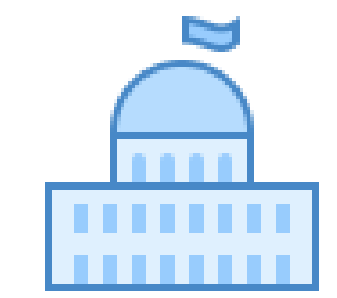
Logistics Performance Index

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 sales (billions of Euros) & growth rate, 2015-2019(f)

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you can purchase the full version at
www.ecommercefoundation.org/shop**

E-Shopper Penetration; E-Shopper Spending

E-Shopper Penetration

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

E-Shopper Spending

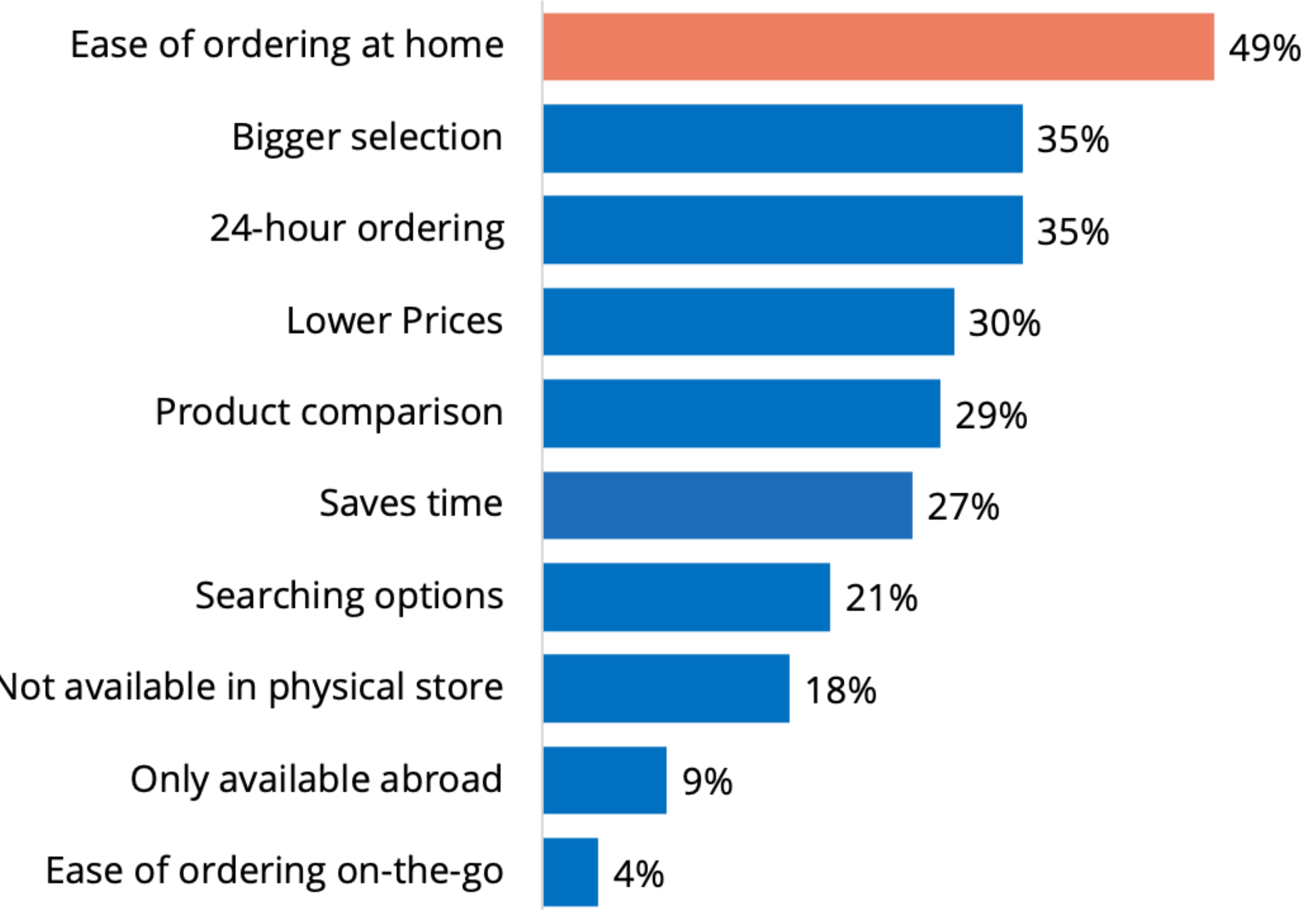
Annual amount spent per e-shopper (Euros), 2015-2019(f)

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Most Dutch consumers shop online for the ease of ordering at home (49%)

Online Shopping: Consumer Advantages
Main advantages to shopping online, consumer survey, 2018

Consumer Opinion: Important Factors
Most important factors for consumers when buying online, 2018

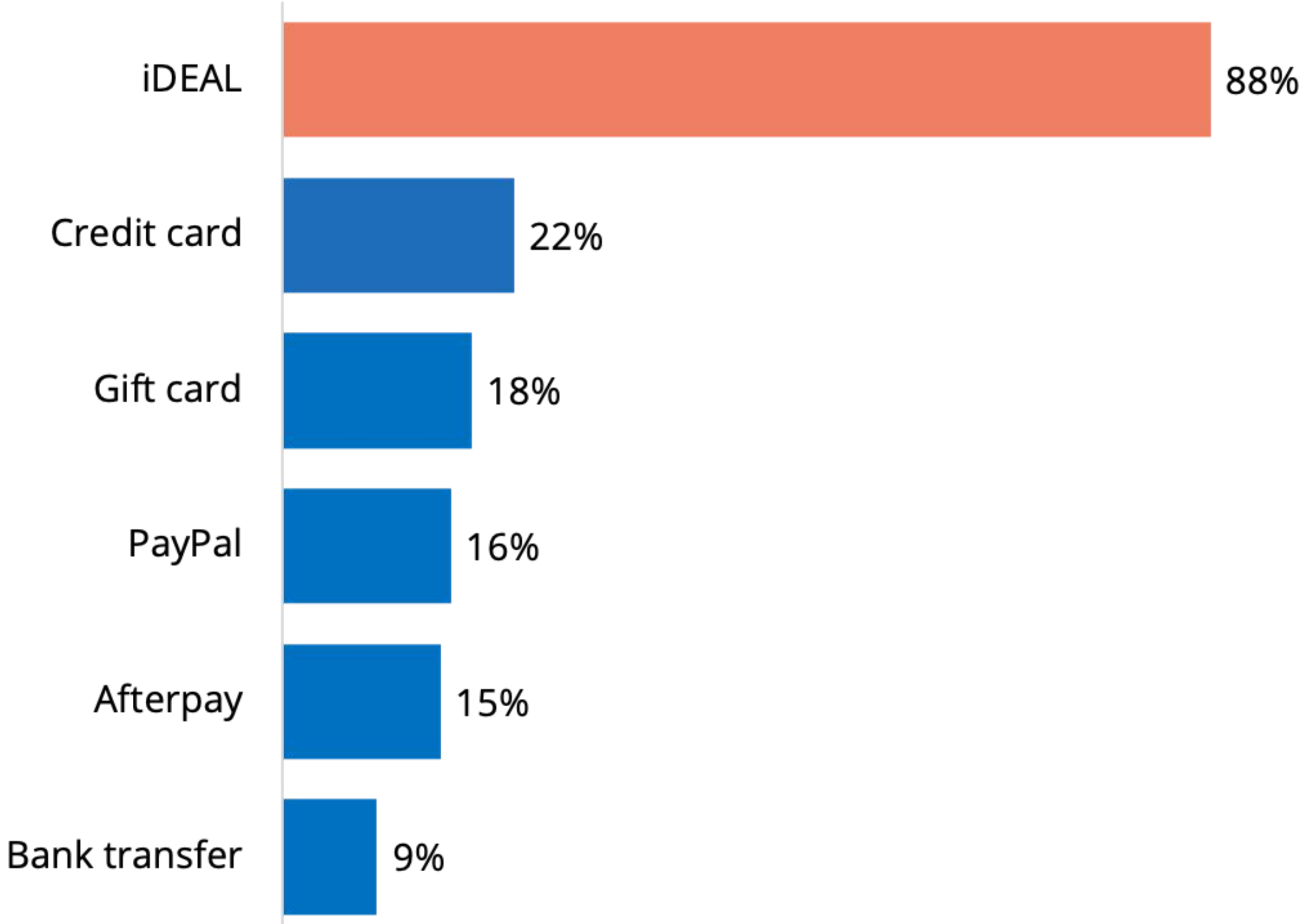


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The most popular payment method remains iDEAL followed by credit card

Payment Methods

Share of buyers who have used each payment method at least once, Q4 / 2018



- iDEAL was founded in 2005
- iDEAL is based on online bank transfers
- In 2016, the iDEAL QR code was launched, enabling users to make payments online and offline via mobile phone

- apnew.com / March 8, 2019

Delivery Preferences

Delivery Methods/Preferences

When you order a product online, how do you prefer to have it delivered?, 2018

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Delivery Preferences

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

NUMBER OF DAYS	SHARE OF ONLINE CONSUMERS
1-2 days	34%
3-5 days	50%
6+ days	11%
Unsure	4%

"Dutch ecommerce scale-up Coolblue has hit the headlines as it delivered the first package on a bike in Tilburg, the Netherlands. This move makes it the first large European ecommerce company to deliver packages by bike."

- Editorial Team,
SiliconCanals.nl / March 1, 2019

Top Online Retailers

Top Retailers

Leading online retailers based on revenue (millions of Euros), 2017

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www.ecommercefoundation.org/shop**

"It can be seen that while direct sales grew a healthy 22% in 2018, the Bol.com marketplace outpaced this growth returning a 55% for 3rd party merchants.

[It is predicted] that 3rd party sales on the Bol.com marketplace will exceed 1 billion in 2019 and by the end of the year be approaching 40% of Bol.com's total sales.

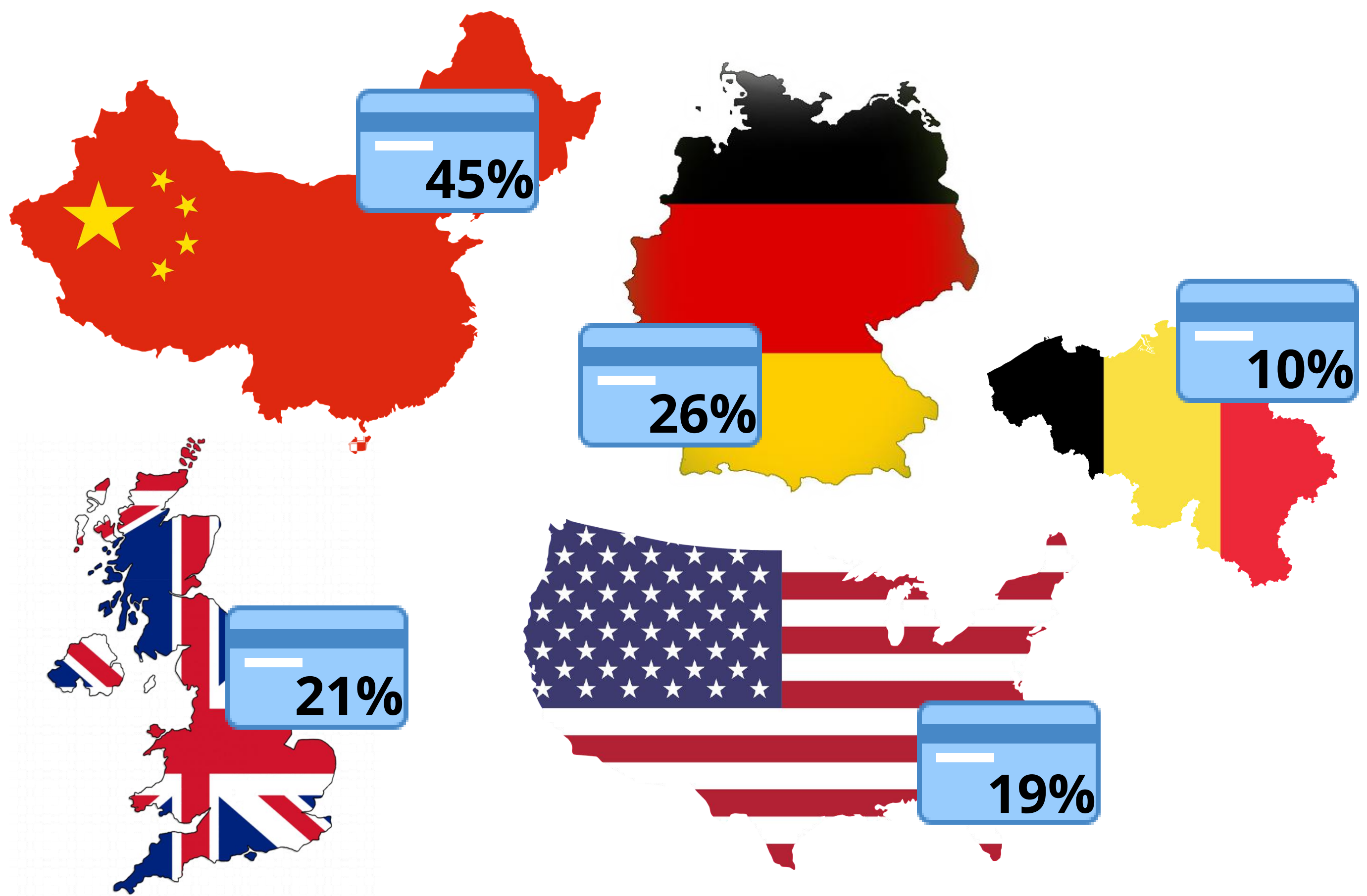
The Bol.com marketplace has more penetration in the Netherlands and Belgium than Amazon, so if you're not already a Bol.com third party merchant, then it's worth considering launching on Bol.com in 2019."

- Chris Dawson, Tamebay.com
/ March 5, 2019

Dutch consumers are making more cross-border online purchases every year

Cross-border Online Shopping

Top countries by share of purchases originating from the Netherlands, 2017



Cross-border Online Shopping

Share of domestic/cross-border shopping, 2016/2018

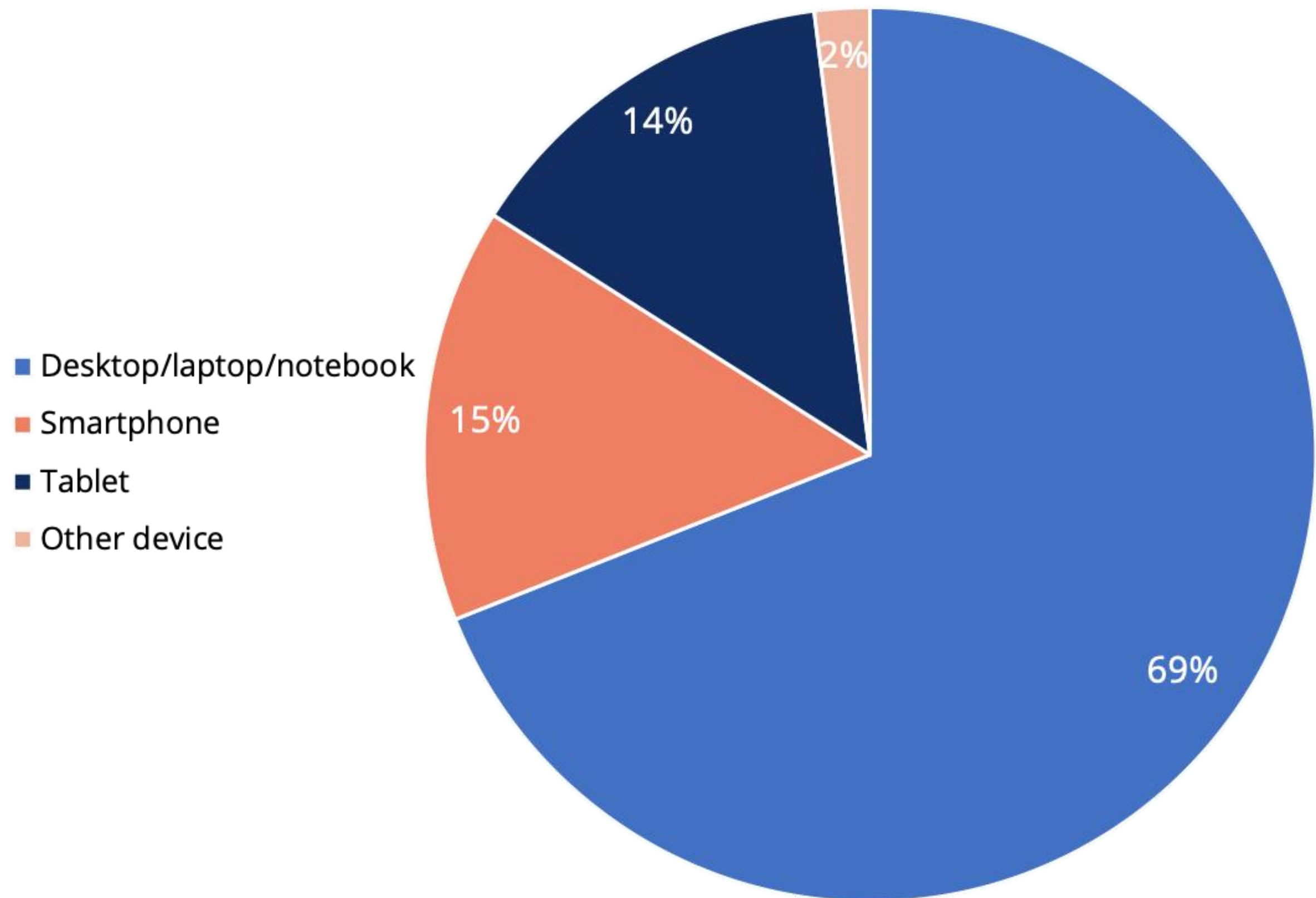
YEAR	DOMESTIC ONLY	DOMESTIC & CROSS-BORDER	CROSS-BORDER ONLY
2016	63%	32%	7%
2018	51%	40%	9%

In 2018, only 4% of Dutch online consumers shopped from webshops originating from unknown countries.

Most consumers prefer ordering cross-border with a desktop/laptop/notebook (69%)

Consumer Preference: Cross-Border Purchasing

Preferred device for cross-border purchases among online shoppers, 2018



Cross-Border Purchasing

Have you ever made one or more purchases at an online shop in the following continents?, 2018

Made one or more purchases at an online shop in region	EU	US	Asia
Regularly	6%	4%	13%
Now and then	37%	30%	35%
Never bought	48%	72%	47%

Majority do not shop from Asian webshops due to not trusting product quality (33%)

Consumer Opinion: Webshop Purchases

What are the reasons you have never ordered products from Asian webshops?, 2018

REASONS	SHARE AGREED
I do not trust the product quality	33%
It's easier to order via a Dutch website	32%
I haven't considered it yet	30%
I don't think I will receive my order	25%
I don't trust the payment methods	19%
It takes too long for my order to arrive	17%
I am afraid customs will impose an after-tax	17%
Lack of quality marks (trustmark/trust seal)	16%
Shipping costs are too high	9%

Shopping Cart Abandonment

Why do you abandon an online shopping cart?, 2018

This is the light version of the report -- you can purchase the full version at www.ecommercefoundation.org/shop

#4 Expert Opinions & Advice





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Richard van Welie

Senior E-commerce Editor,
Thuiswinkel

Richard is an experienced editor, in both English and Dutch, with broad knowledge in the field of ecommerce, content marketing, copywriting and language consultation.

Richard has been the Senior E-commerce Editor for Thuiswinkel.org since 2014.

Q: Has there been a shift in ecommerce behavior during the consumer journey?

A: Nowadays, consumers choose how, where and when they buy products and/or services. In other words, they are completely in control. In doing so, they effortlessly switch between different devices and (online) stores. Consumers do not think in terms of customer journeys and channels. They just want to receive the same experience throughout their entire shopping journey.

As a result of new technologies, consumers are equipped with more and more options to shop through different channels. Just think about devices such as voice assistants. This makes it easier for consumers to purchase products and/or services, while it is forming quite a challenge for retailers and brands to become top of mind or even sufficiently capture the consumers' attention. Therefore, it is crucial for them to anticipate this change in online shopping well in advance.

Q: What do you see as the main sources of innovation in ecommerce in the upcoming year?

A: The current technological developments, as well as the ones in the near future, will really shake up the e-commerce market. It will soon be impossible to imagine the Dutch retail market without technologies such as voice, artificial intelligence and virtual reality. Voice, for instance, already is quite common in the United States. Even though we are lagging behind a little in the Netherlands, I believe it will not take much longer before Dutch consumers will use their voice more frequently as well to order their products and/or services online. After all, many of them already have voice assistants at home and are experimenting with them.

“...[consumers] want to receive the same experience throughout their entire shopping journey.”



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.org

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Q: Where do you believe that SMEs should be focusing their technology investments to best capitalise on the market?

A: In my opinion, SMEs should invest in a sound mobile strategy. As a matter of fact, they should have done so a while ago, so if they have not yet thought about their mobile channel, I urge them to do this as soon as possible. Nowadays, people are almost always looking at their mobile screen and using their smartphone when they need something. This makes it *the* channel to approach your customer, both in the B2C and in the B2B sector. As a result, mobile should be incorporated in all stages of your customer journey. Online stores without a proper mobile website will have a hard time to survive in this extremely competitive market.

In addition, personalization will become increasingly important. When you are capable of providing some level of personalization to your

customers, for instance through your website or newsletters, you will have a huge advantage over your competitors. With this you can offer your customers the right product at the right time, making you more relevant and significantly increasing your conversion rate. In order to implement personalization successfully, it is essential to properly collect and manage data – perhaps with the help of a professional third party – so that you can offer a unique customer experience, every single time

“Nowadays, people are almost always looking at their mobile screen and using their smartphone... mobile should be incorporated in all stages of your customer journey.”

**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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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: 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.”



Roy Machielsen

Managing Director, Osudio

Having a strong background in design and business Roy has assisted many of Osudio's clients in the development of digital products that advance their business.

Roy is excited about all the opportunities that digital creates to engage users and to build strong brands across channels.

Q: Where do you see consumers being let down with ecommerce UX right now?

A: Customer engagement remains a big challenge for many brands on their ecommerce platform. How to shape and retain a true brand relationship and become the preferred brand through loyalty?

There are amazing opportunities across the whole customer journey, delivering experiences that are valuable to the customer. Ultimately, the complete experience that people have with a brand will make them decide to return for more. Especially the customer experience after 'check-out' offers many possibilities to shape the customer relationship. Quite often consumers are left out after the check-out, with a thank-you e-mail, shipping updates and a review request, essentially leaving the customer with a product in a box. There are only a few brands that are currently able to deliver a memorable user experience, where the mission of a company reflects in each and every step of the journey

and resonates with the customer. A sound understanding of the commerce platform and how it fits into the customer journey and brand strategy is key to build loyalty.

In general, we see that brands are not leveraging all the opportunities that user experience as an integral part of their business operations is offering. Related to ecommerce, many companies have a platform up and running, but they don't realize their desired outcomes. We often see that companies are focusing too much on technology and have difficulties in changing their organization to become more customer-centric. These laggards do not fully realize that having an ecommerce platform in place is part of the basics; it is the transactional layer.

“We believe that the orchestration between business, technology and customer is the key to success.”



Roy Machielsen
Managing Director, Osudio

Having a strong background in design and business Roy has assisted many of Osudio's clients in the development of digital products that advance their business.

Roy is excited about all the opportunities that digital creates to engage users and to build strong brands across channels.

The real difference is made by building an engagement layer on top, both in B2B and B2C. We believe that the orchestration between business, technology and customer is the key to success.

There are great examples, of mostly – but not exclusively – brands that started off as pure players. These companies mastering user experience, partly based on data and insights, are incrementally extending their reach beyond the digital channel, offering a consistent and engaging brand experience from the first interaction with their customers up until the 'last mile' of delivery and beyond.

“... ‘new retail’ strategies will enable a better orchestration of ‘experience’ and ‘transaction’ but will also blur the offline and online channel divide...”

Q: How will the growing push towards mobile go even further in 2019?

A: The push towards mobile is making ecommerce evolve rapidly with mobile opening up new possibilities with voice and augmented reality. Next to technical capabilities that will drive new experiences, mobile also opens up possibilities and challenges for 'new retail' strategies which are essentially being defined in countries like China. These 'new retail' strategies will enable a better orchestration of 'experience' and 'transaction' but will also blur the offline and online channel divide.

This is demonstrated by 'new retail' examples such as HEMA in China. Mobile should therefore not be regarded as a separate channel, but as an integrator as such. Once mobile is integrated in the commerce journey, more data will become available on the consumer and offline experiences will become more data driven. All these developments are providing an outlook beyond 2019.



Willem Jan Rutgers

Business Line Manager, Hostnet

Willem Jan Rutgers has been working at various business service providers, mainly in the IT & cloud industry. Since 2014 he works for Hostnet, one of the largest web hosting companies in the Netherlands. Hostnet's mission is to realize the dreams and ambitions of entrepreneurs with the best online solutions.

Willem Jan has passion for ecommerce, digital marketing and innovation. He currently holds the position of Business Line Manager.

Q: Looking back at the GDPR implementation from 2018, how do you feel this has impacted the Dutch ecommerce industry?

A: The new GDPR legislation, fortunately, has caused a lot of necessary awareness amongst consumers. They have a right to know what happens with their data as in most cases they are not fully aware. The old legislation was over 20 years old and not aligned with the digital world we are in today.

For us as a hosting company, this legislation would make a huge impact so we started early on the implementation thereof. We noticed that customers had questions about it, and we have facilitated them as well as possible. We have seen that many webshops implemented the new GDPR rules very rigorously in May 2018, and have taken a step back from it since then.

On the other hand, many smaller webshops are still not compliant while they should be. I expect the Dutch government to take more action in

the coming years, so in the long-run everyone is compelled to fulfill their obligations. At the moment there is too little capacity to monitor all shops properly but this will change in time. Webshops now have to think carefully about how to implement tracking and analytics and be more transparent in communicating about it to customers. This legislation impacts the way webshops measure marketing ROI as well because webshops are very dependent on tracking their campaigns.

It is useful that there is more awareness now, but the implementation does not always work out well for consumers. Many of the cookie consents for example, still mostly arouses irritation amongst users.

“The old legislation was over 20 years old and not aligned with the digital world we are in today.”



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Business Line Manager, Hostnet

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Willem Jan has passion for ecommerce, digital marketing and innovation. He currently holds the position of Business Line Manager.

Q: The debate still rages regarding privacy and online shopping experiences. Yet personalisation is core to future strategies. Do you think these two sides can coincide?

A: If webshops want to be more relevant, customer data is, of course, a critical success factor. I am sure that customers are willing to give up some information about themselves, provided they get something in return for it. It is very important that webshops are transparent and clearly indicate what they do with the data and handle their customer's data with integrity.

The challenge is to offer customers sufficient benefits that make them willing to share their data. In my opinion, great user experience and the communication about why webshops ask for data are contributing factors. Give consumers a reason to share their data and give them something worthwhile in return. If it benefits both customer and webshop, there are still many possibilities to personalize the shopping experience.

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

A: The increasing importance of speed and user experience to get a better position in the search results. You see that there is more and more emphasis on it, and there is also a lot to gain for many webshops. We see that there is often a lot to improve on customer's websites, for example by compressing pictures. A fix that seems simple but that is often overlooked. Also, think of implementing the right content management system that works for you. On both server and client side, a good caching helps a lot to improve speed. We get many questions from customers looking for a solution to speed up their webshop. There is not a one size fits all solution.

“The challenge is to offer customers sufficient benefits that make them willing to share their data.”

#5 About the Report



About the authors



Sara Lone
Research Coordinator

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
Researcher

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.



Shaun Packiarajah
Researcher

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

Thuiswinkel.org

GfK

IMF

Quandl

CIA world Factbook

WorldBank

Wikipedia

Eurostat

Statcounter

Statista:

-DNB, iDEAL, Panteia, GfK, CensusWide, PostNord, Ipsos, Survey Sampling International, Centraal Bureau voor de Statistiek, Trustly, Nepa, Twinkle100.nl, Post NL

Doing Business

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The Economist
Intelligence Unit

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Statista/SAP

Statista/Salmon/
Wunderman

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The National Ecommerce Reports are published by Ecommerce Foundation. They provide overviews of the mature and emerging markets in the field of ecommerce.

In total, Ecommerce Foundation publishes multiple country reports and three overview reports per year, covering the most important ecommerce markets worldwide.

To have a tailor-made ecommerce report made, completely based on your wishes and requirements, please contact us via info@ecommercefoundation.org.

The full reports can be online purchased via:
<http://www.ecommercefoundation.org/reports>.

Your feedback is very much appreciated. If you would like to help us make the 2019 reports even better, please take our **3-minute survey**.

Also, consider **becoming a member** of Ecommerce Foundation for even more services and opportunities to sell better globally.

OVERVIEW REPORTS 2019

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2019 COUNTRY REPORTS

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