

# The future of retail according to the consumer

GfK ShoppingTomorrow Consumer Study 2017

GfK – Ine Polak

Shopping Time 2017

# GfK ShoppingTomorrow Consumer Study 2017: Content and topics



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Expected trends  
in online & offline  
shopping

3

Crossborder Shopping:  
a whole new world

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Privacy: issue or  
opportunity?

2

Mobile Commerce:  
it's all about mobile

4

Diving into the online  
purchase journey:  
about delivery & returns,  
packaging &  
sustainability

# 1

## Expected trends in online (& offline) shopping







thuiswinkel  
.org



**23%** of total Dutch B2C  
consumer spending  
can be appointed to  
**online sales**

(HY1 2017\*)

**2017\***

**23%**



**77%**



**15%**

Online share  
products

**77%**

Online share  
services

The consumer  
expects  
this share to grow  
...

**2022  
expectation**

**35%**



**65%**



\*Source: Thuiswinkel Markt Monitor Q2 2017, period: Jan-Jun 2017/\*\*Source: GfK ShoppingTomorrow Consumer Study 2017

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And the young  
generation  
leads the way...

...they expect **43%**  
of  
their total spending  
to go to webshops  
by **2022**

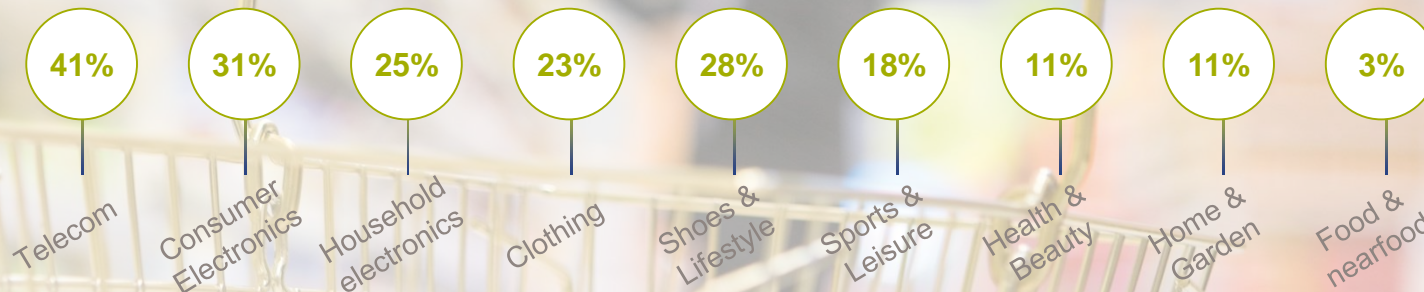




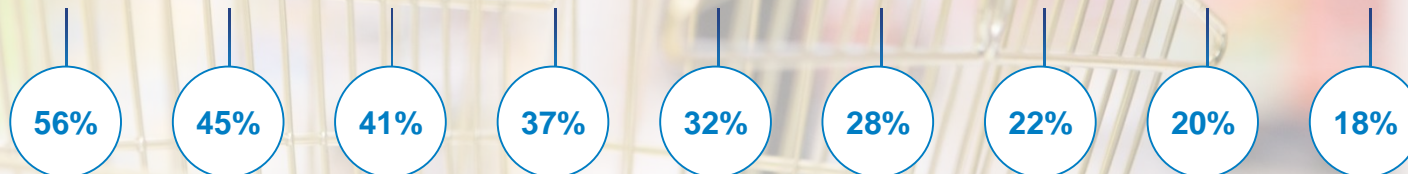
## Zooming in on **product categories**, now and in the future



Online share in  
spending HY1  
**2017\***



Expected online share in  
spending  
according to the consumer  
**2022\*\***



\* Source: GfK Thuiswinkel Markt Monitor Q2 2017, period Jan-Jun 2017

\*\* Source: GfK Shopping Tomorrow Consumer Research 2017

## Barriers to buy groceries online

**1. Enough supermarkets nearby (57%)**

**2. Personal selection of fresh products (49%)**

**3. Delivery costs are too high (21%)**

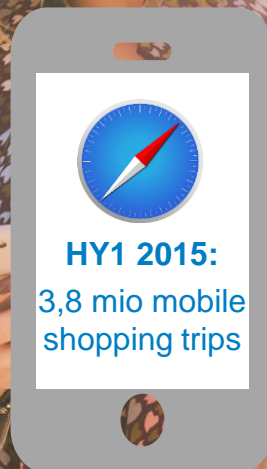
**4. Minimum order amount is too high (14%)**

# 2

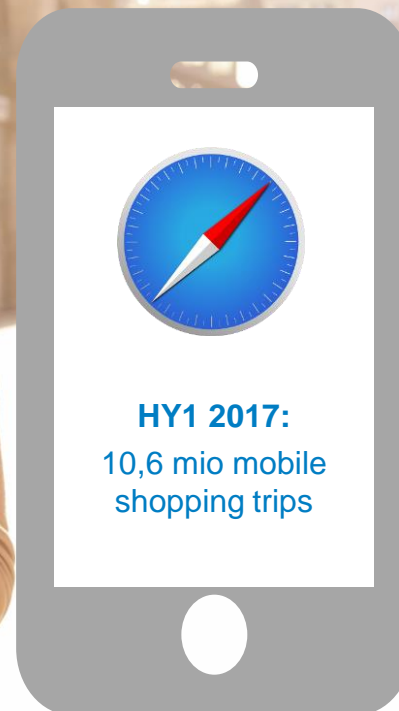
Mobile Commerce:  
it's all about mobile



# Mobile Commerce driver of online growth



+ 183%



Almost half of all  
online shoppers  
(47%) has used their  
smartphone for  
shopping

Two thirds of  
mobile shoppers  
uses **both mobile  
websites and  
apps** for mobile  
shopping

And **mobile  
shopping  
penetration** is  
even higher  
among 15-34 year  
olds: 70%



More than 1/3 of  
Dutch online  
shoppers expects to  
do the largest part of  
their online shopping  
trips via the smart  
phone

15-34 year  
olds:  
52%



## Challenges for Mobile Commerce: **dissatisfiers**

**1** Product pictures are too small/unclear (40%)

**2** Entry personal info is inconvenient (37%)

**3** Mobile browsing is inconvenient (33%)

15% of Dutch consumers would like to contact retailers **via chat apps for advice**

72% of them would like to use chat to buy products or services

**1. Clothing (35%)**

**2. Household electronics (34%)**

**3. Consumer electronics (34%)**

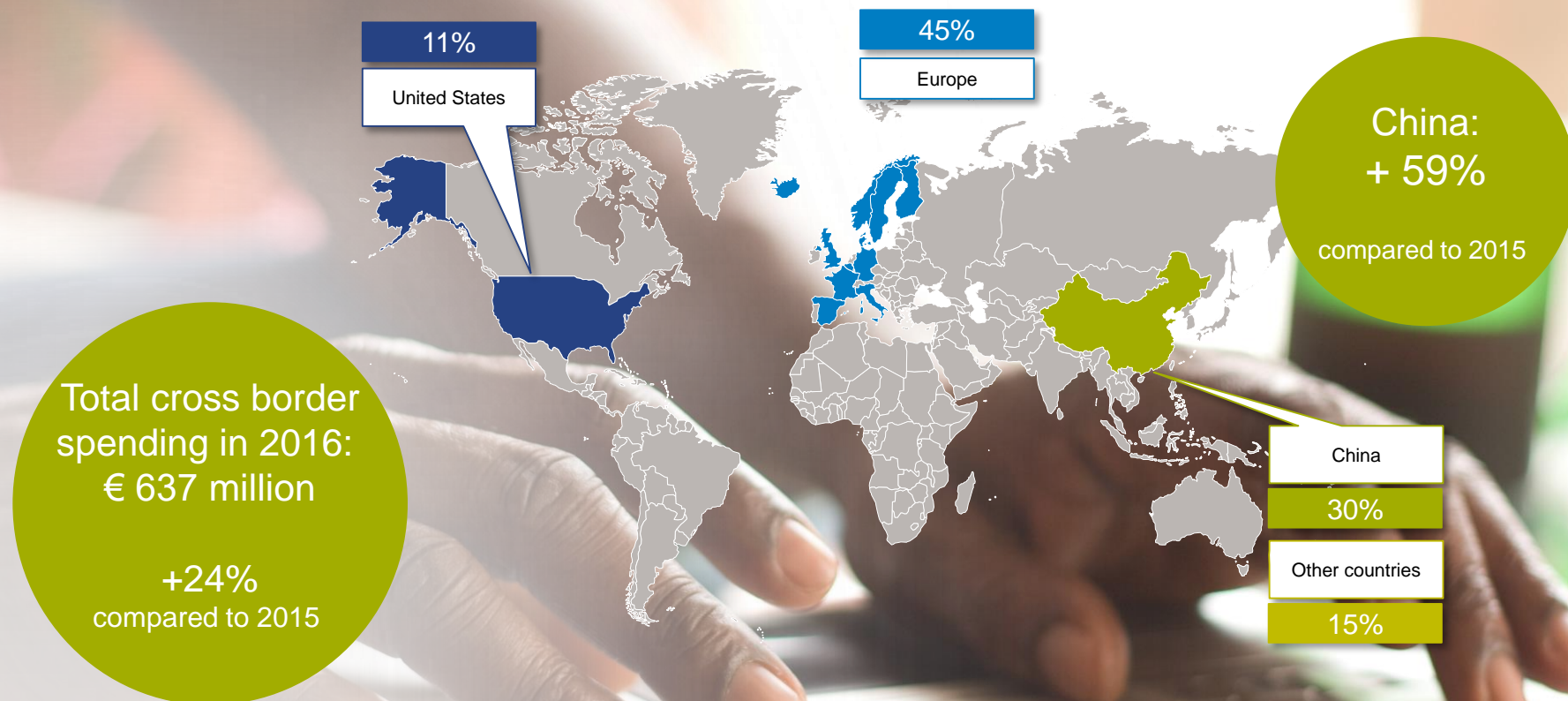
**4. Event tickets (31%)**

**3. Computers & accessories (31%)**

# 3

## Cross border shopping: A whole new world?





Penetration Asian  
webshops

42%

34%

24%

2015

2016

2017

And 25% of those who haven't  
bought at Asian webshops yet,  
expect to do so in 5 years





## Reasons not to buy via Asian websites





A person is sitting in an orange theater seat, holding a globe over their face. They are wearing a plaid shirt and a tan sweater. A black strap is visible across their chest. The background shows rows of empty orange seats.

**85%**  
of cross-border  
shoppers is  
aware of having  
to pay import  
duties

**62%**  
takes this into account  
when filling  
their shopping  
cart

To summarize

Three key-take outs

1

More growth expected for online with mobile commerce and cross border commerce as drivers

2

Improvements in user friendliness mobile shopping necessary to support growth of mobile commerce

3

China is booming, but could product quality make or break the attractiveness of shopping via Chinese websites?

But there is more  
to come..

The full report of the study can be downloaded  
at the **ShoppingTomorrow** website..

...and as an impression of the rest of the  
content, let's do a quiz!



Waar of niet waar?

**Stelling:**

***Nederlandse consumenten vinden  
privacy belangrijker dan een  
optimale dienstverlening***

**WAAR:**

**65% vindt dit belangrijker.**

**Ouderen (65+) hechten hier in het bijzonder  
veel waarde aan, onder deze groep is 71% het  
eens met deze stelling.**

Welke antwoord  
is correct?

**Wat is de meest voorkomende wijze  
waarop consumenten hun pakketjes  
ophalen en afgeven bij pick-up  
points?**

- A. Ik pak er speciaal de auto voor**
- B. Ik pak er de auto voor maar  
combineer het met een andere  
boodschap**
- C. Lopend of op de fiets**

**Antwoord C**



Welke antwoord  
is correct?

**Antwoord D**  
Bij 37% van de  
consumenten heeft  
thuisbezorging overdag  
dit de voorkeur

**Welke bezorgmethode is favoriet bij  
de Nederlandse consument?**

- A. Bezorging bij pick-up point**
- B. Thuisbezorging in de avond**
- C. Op het werk**
- D. Thuisbezorging overdag**



Welke antwoord  
is correct?

**Antwoord B**

71% is voorzichtig dit te  
delen:

Welk van de volgende zaken vindt  
de Nederlandse consument het  
minst erg om te delen met winkels?

- A. Toegang tot social media*
- B. Browser geschiedenis*
- C. Hun locatie*
- D. Telefoonnummer*

De laatste vraag...

**Hoeveel % van de online kopers in  
Nederland is bereid om extra te  
betalen voor een milieu-vriendelijke  
verpakking?**

**24%**

# Questions?



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