



Episerver Mobile
Commerce Report
2015 – Benelux

“Talking about ‘mobile’ commerce is almost an anachronism now.”

As high street and online shopping have merged, this evolution has continued onto all of our mobile electronic devices. We are, as consumers, as comfortable buying on our smartphones and tablets, as we are desktops and laptops. Even more so, perhaps.

For the last five years, we at Episerver have been monitoring this evolution through our annual mobile commerce report. In 2012 our findings highlighted the challenges of the new digital economy and the need for retailers to improve the quality of their content online. Our 2013 report accurately predicted the shift towards mobile-first retailing, emphasising the move away from laptops and towards shopping on the go. Then in 2014, we highlighted a growing need for ecommerce providers to target their audiences through a genuinely cross-channel marketing approach.

Having traditionally focused these reports on the UK market, we decided it was time to expand the scope of our research and open up our benchmark to the global marketing community. This year we commissioned five independent surveys, researching 5300 consumers

across Benelux, the Nordics, US, UK, and Australia. These surveys analysed everything from international customer expectations through to preferences for mobile layout and application design.

Having identified what it was that consumers looked for in a mobile site (speed, ease of navigation, etc.) we ran a benchmark of the top 20 retailers from each region around the globe. This process examined the mobile websites, tablet applications, iPhone and Android apps of each retailer, comparing their current functionality to the consumer expectations outlined through our international research.

Through this benchmark, we've been able to learn a great deal about the current and future direction of mobile marketing. So whilst we have seen the rapid evolution of consumer expectations, retailers have struggled to keep up with the pace. This is why it still makes sense to look at how retailers are approaching mobile commerce, and why it's so interesting this time around to expand our view to an international level.

As the expectations of customers have grown increasingly stringent, so too have the criteria and scoring behind our benchmark. As this report shows, the average overall score for mobile strategy throughout the Benelux region was only 26%, far lower than that of the other four locations. This leaves significant room for improvement, with many Benelux brands shunning mobile and tablet applications in favour of more traditional mobile sites (despite consumer demand for apps). But it's not all bad news, with so few brands taking advantage of mobile apps, now is a great time for marketers to get ahead of the game – particularly given Benelux's growing mobile adoption rates.

David Bowen
Director Product Manager for E-commerce



89%

of Benelux respondents own a smartphone

36%

of respondents expect brands to have a mobile optimised site

1 in 5

consumers expect brands to provide a mobile app

58%

of Benelux consumers owns an Android smartphone

20%

of Benelux consumers expect brands to provide a mobile app

1 in 5

consumers will switch to a competitor site if a site does not load

44%

of respondents use their smartphones while shopping on the high street

14%

consider mobile to be their first port of call

The key reason to browse a mobile in Benelux is to check social media

Globally, slow loading times are considered the biggest frustration of modern mobile users

State of the global mobile market

Throughout 2015 mobile adoption in Benelux has increased dramatically, with 89% of the population now owning a smartphone. While this figure remains slightly lower than the other regions surveyed, it does put Benelux on par with the UK for overall smartphone adoption.

In addition to smartphones, 73% of respondents owned a tablet, giving Benelux the second highest tablet adoption rate across the five regions. 62% own both a smartphone and a tablet. Despite Apple's dominance in the global tablet market, Benelux consumers were more likely to own an Android tablet than an iPad. This was also true of Android smartphones, making Benelux the region most likely to own an Android device.

62%

of Benelux consumers own both a smartphone and a tablet

54%

of Benelux tablet owners use their device to browse the web every day

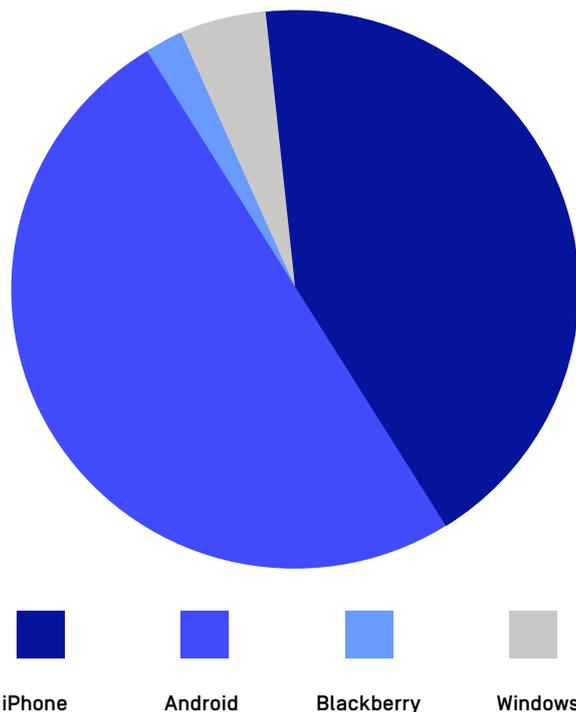
14%

of Benelux consumers consider mobile to be their first port of call when shopping online

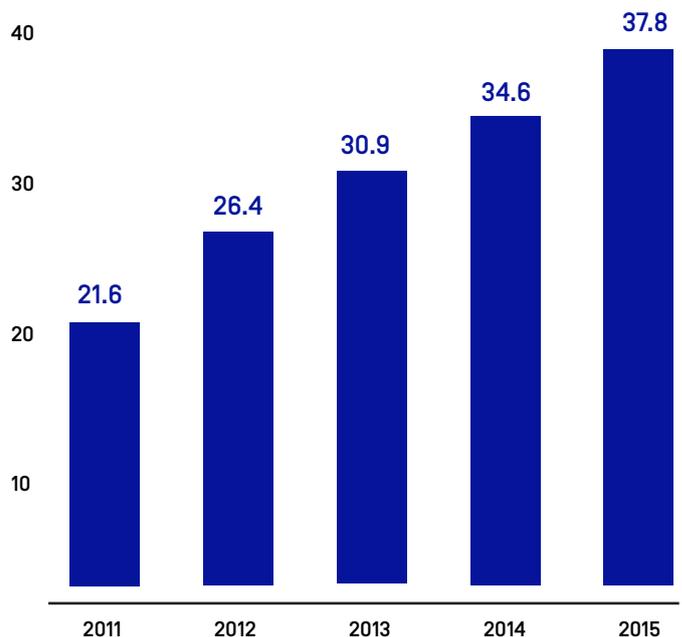
65%

of Benelux consumers have made a purchase via their mobile browser

Global smartphone market



Smartphone users in millions



What we buy

In mobile shopping, it seems browser's best. 65% of Benelux consumers have made a purchase using their device's browser, while 50% have made a purchase via a retailer's mobile app. Due to a lack of tablet-friendly applications however; the average number of purchases made on a mobile device (smartphones and tablets) was significantly lower than other regions - falling behind the UK, US and Australia.

For the 73% of the population that do own tablets, 71% of them have used their devices' web browsers to make a purchase, while 62% have shopped on a tablet app.

The most common purchase in Benelux was apparel, with 24% of consumers having purchased clothing and similar items online in the last six months. This was followed by travel (22%) and entertainment-related (20%) purchases. Throughout the rest of the world, apparel was consistently the most commonly purchased item on a mobile device. The only exception was in the Nordics, where travel was 6% more likely to be purchased.

Top purchases on a mobile phone (Benelux)

- Apparel
- Travel
- Entertainment
- Books/Music

Why Benelux consumers browse on their mobile devices:

1. Social networking
2. Looking up directions
3. Communicating w. friends & family
4. Online banking
5. Reading

62%

of Benelux tablet owners have used their devices to make a purchase

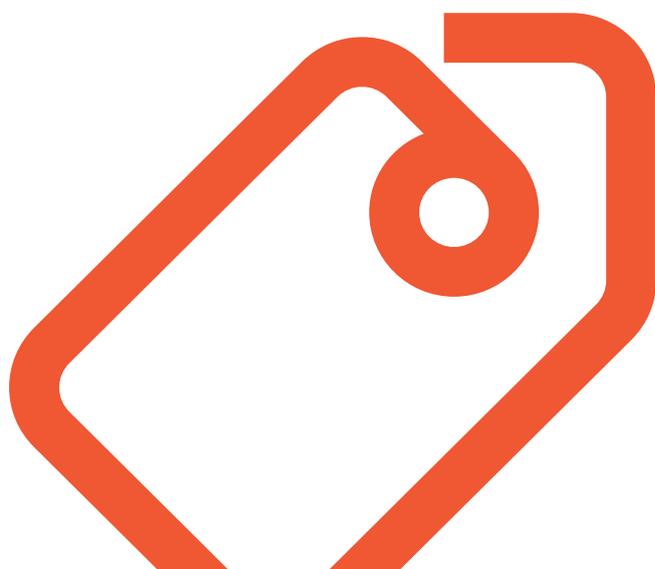
50%

of Benelux consumers have made a purchase via a retailer's mobile app

24%

of Benelux consumers have purchased tickets and travel-related items on their mobile devices

Top tip: Don't ignore Blackberry. The market may be much smaller, but – in percentage terms - Blackberry owners conduct more mobile shopping than any other smartphone demographic.



Where we buy

Benelux consumers are most likely to access mobile websites from their home, with 88% of respondents ranking “at home” in their top three locations for browsing on a smartphone.

This was also true for Benelux tablet owners, with 88% using their device to browse the web from home. This highlights the need for retailers to take a mobile first approach, with consumers increasingly shunning their laptops and home computers to shop on smartphones and tablets instead.

When outside of the home, nearly half (44%) of Benelux respondents placed “on the high street” in their top three locations for using a mobile device, providing retailers with a strong opportunity for mobile/in-store crossover experiences.

Outside of the home, the locations consumers used their mobile devices varied significantly. US consumers were the most likely to browse at the office or in their car, while those from Benelux were generally more likely to browse on public transport. Both UK and Australian consumers also conducted a significant portion of their mobile browsing on the high street.

44%

of Benelux consumers place “on the high street” in their top three locations for using a mobile device

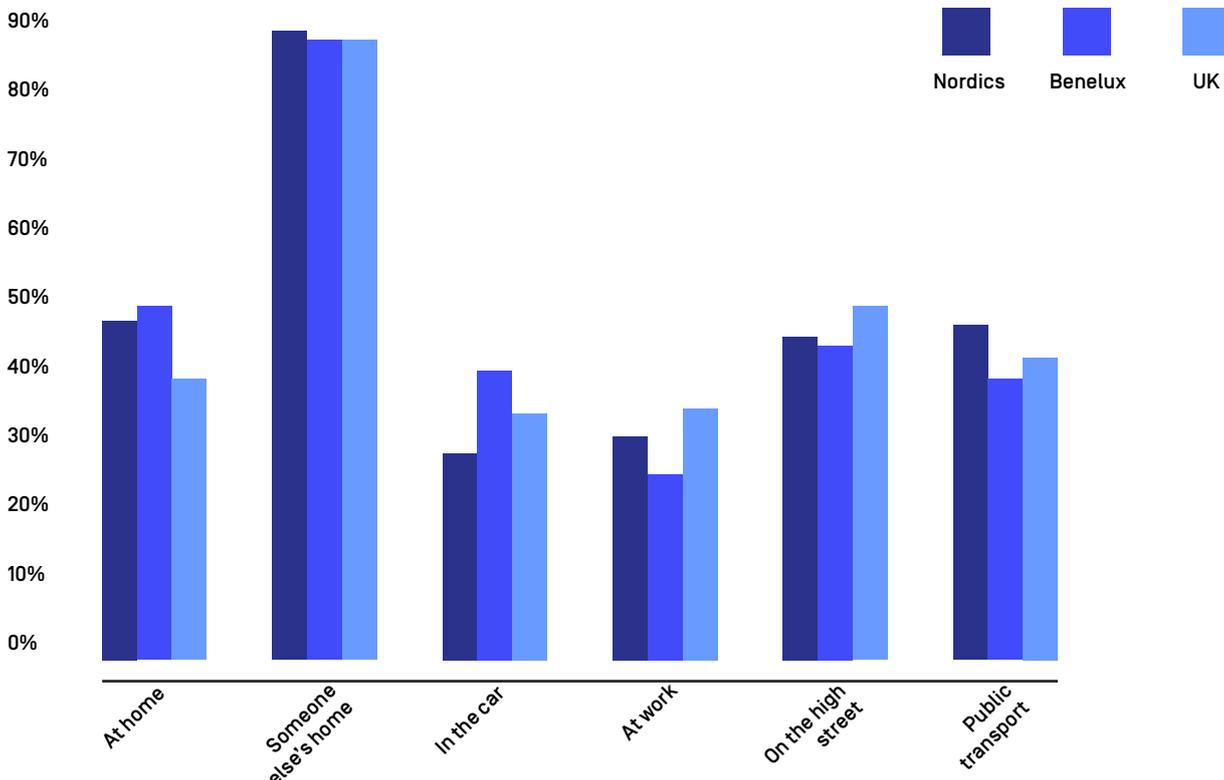


“Done right, digital doesn’t kill high street shopping, it enhances it”

David Bowen,

Director Product Manager for E-commerce

Where do you most often use your smartphone to access websites?



Why we buy

Across the board, “speed and convenience” was cited as the number one reason why consumers browse products on a mobile device rather than using a PC or going in store. Within Benelux, 33% selected it as their key reason for choosing to browse on a mobile device.

In terms of specific promotional tactics, Benelux, the UK, US and Australia are particularly susceptible to email offers. Of all five regions, consumers from Benelux are the most affected by time pressure, giving mobile marketers an opportunity to focus their efforts on timed promotions and limited availability offers. Mobile coupons and application notifications are most effective amongst US audiences.

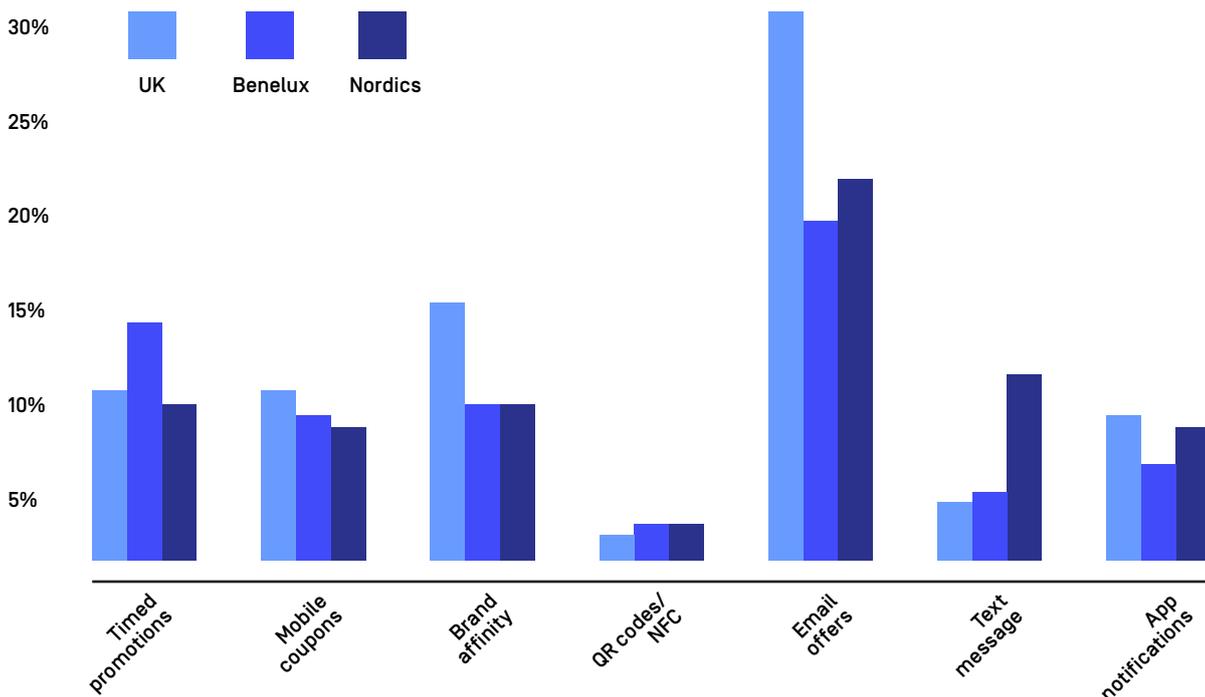
QR codes and NFC touch points have the least impact with only 3% of Benelux respondents feeling that they have influenced a purchase decision. Email remains an extremely effective promotional tactic across the board. This may be due to the increasing number of people who use email on mobile, with 67% of consumers now regularly checking their email on their smartphones.

Triggers for mobile browsing (Benelux)

1. Speed and convenience
2. Email offers
3. No option to buy in store
4. Timed promotion

What works where? (Mobile triggers around the world)

- Australia: App notifications and email offers
- Nordics: Text messages
- US: QR / NFC and mobile coupons
- UK: Brand affinity & speed/ convenience:
- Benelux: Time pressure



Customer expectations

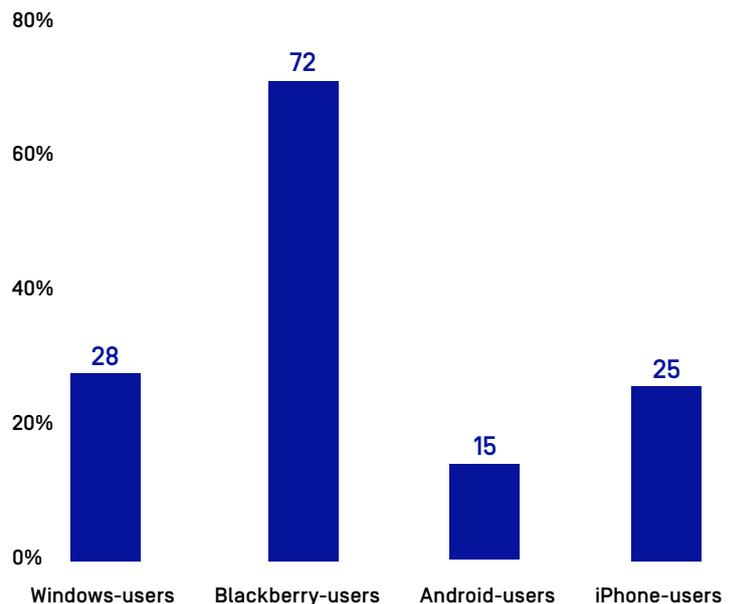
When asked which features they expect from a retailer's mobile website, Benelux consumers were most interested in mobile responsiveness, the inclusion of user reviews, and direct in-app customer service.

Around the world, consumers widely considered user reviews and direct customer service to be the most important features for a mobile website. The only exception to this was the UK, where consumers were most interested in the inclusion of in-store collection services.

Consumers across the globe were also more than **twice as likely** to demand personalised content than they were social media integration, with only 8% of Benelux respondents requesting a way to share their purchases on social media. While the two experiences go hand in hand, marketers need to remember that social media logins are just as much about improving the customer's experience as they are about harvesting data. Social media integration can lead to highly effective personalisation strategies.



Which mobile users make in-app purchases at least once a month? [Benelux]



Top 5 Benelux mobile expectations

38%

Responsive screen size

22%

In-store collection service

32%

User reviews

22%

Wish list functionality

31%

Easy and direct customer support

20%

of Benelux respondents demand personalised product recommendations

Combine content with commerce

Out of all the regions surveyed, consumers from Benelux were the most likely to expect helpful content such as editorials, videos and how-to guides. This provides marketers with a good opportunity to develop a combined content and commerce approach.

Customer frustrations

When it came to users' frustrations, all five regions ranked slow loading times as their biggest annoyance. UK and US consumers were also particularly concerned by the amount of information that retailers requested, while those from Benelux and the Nordics were frustrated by a lack of responsive design.

Addressing these frustrations is vital for retailers, with 58% of Benelux consumers saying that they will abandon a site if it proves difficult to access. Even more worrying for retailers is that 1 in 5 Benelux respondents claim that they will go straight to a competitor's site to find an alternative.



What do you do if you experience difficulties accessing a mobile site?

- | | |
|--|---|
| 58% Leave the site | 6% Contact customer service |
| 38% Wait till I can access the site from my desktop | 2% Leave negative feedback on social media |
| 19% Try a competitor | 4% Other |
| 5% Keep using the site | |

1 in 3

of Benelux consumers agree that poor mobile design reduces the likelihood they'll make a purchase

62%

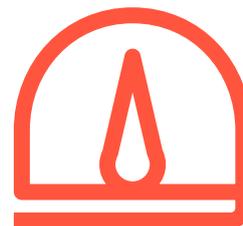
of Benelux consumers won't bother trying a desktop site if they can't access the mobile version.

58%

of Benelux consumers will abandon a site if it proves difficult to access

How Benelux retailers are performing

Having reviewed twenty top retailers from the Benelux region, it is clear that many businesses still have a long way to go before they meet the expectations of modern consumers. The average score for mobile performance was a mere 26%, falling behind every other region in our benchmark. In fact, the average retailer score for Benelux was less than half that of the UK (57%) and almost half that of the US (50%). This leaves significant room for improvement, with many Benelux retailers failing to provide Android compatible mobile and tablet apps. This is particularly worrying given that the majority of consumers within the region are exclusively using Android devices.



The benchmark: Mobile commerce experience

	Mobile strategy %	Mobile site %	iPad app %	iPhone app %	Android phone %	Android tablet %	Total %
ah.nl	88.89%	64.58%	33.08%	53.33%	78.33%	60.91%	62.10%
wehkamp.nl	88.89%	50.42%	70.77%	45.83%	45.83%	70.00%	59.26%
bol.com	77.78%	57.08%	56.92%	51.67%	56.67%	50.91%	57.65%
bartsmit.com	55.56%	53.75%	26.92%	0.00%	0.00%	0.00%	26.42%
kpn.nl	77.78%	55.00%	0.00%	0.00%	5.83%	0.00%	25.80%
dixons.nl	33.33%	74.17%	0.00%	0.00%	0.00%	0.00%	25.68%
blokker.nl	33.33%	73.33%	0.00%	0.00%	0.00%	0.00%	25.43%
mycom.nl	33.33%	68.33%	0.00%	0.00%	0.00%	0.00%	23.95%
icentre.nl	33.33%	67.50%	0.00%	0.00%	0.00%	0.00%	23.70%
intertoys.nl	44.44%	60.42%	0.00%	0.00%	0.00%	0.00%	22.84%
xenos.nl	33.33%	62.92%	0.00%	0.00%	0.00%	0.00%	22.35%
plasmadiscounter.com	44.44%	54.58%	0.00%	0.00%	0.00%	0.00%	21.11%
koffiediscounter.nl	44.44%	54.58%	0.00%	0.00%	0.00%	0.00%	21.11%
gall.nl	44.44%	53.75%	0.00%	0.00%	0.00%	0.00%	20.86%
coolblue.nl	44.44%	49.17%	0.00%	0.00%	0.00%	0.00%	19.51%
fongq.nl	33.33%	44.17%	0.00%	0.00%	0.00%	0.00%	16.79%
diervoordeel.nl	44.44%	32.92%	0.00%	0.00%	0.00%	0.00%	14.69%
marskramer.nl	0.00%	36.67%	0.00%	0.00%	0.00%	0.00%	10.86%
leenbakker.nl	11.11%	20.00%	12.31%	0.00%	0.00%	0.00%	9.14%
etos.nl	0.00%	13.75%	0.00%	0.00%	0.00%	0.00%	4.07%
AVERAGE	43.33%	52.35%	10.00%	7.54%	9.33%	9.09%	25.67%

Best mobile retailer 2015

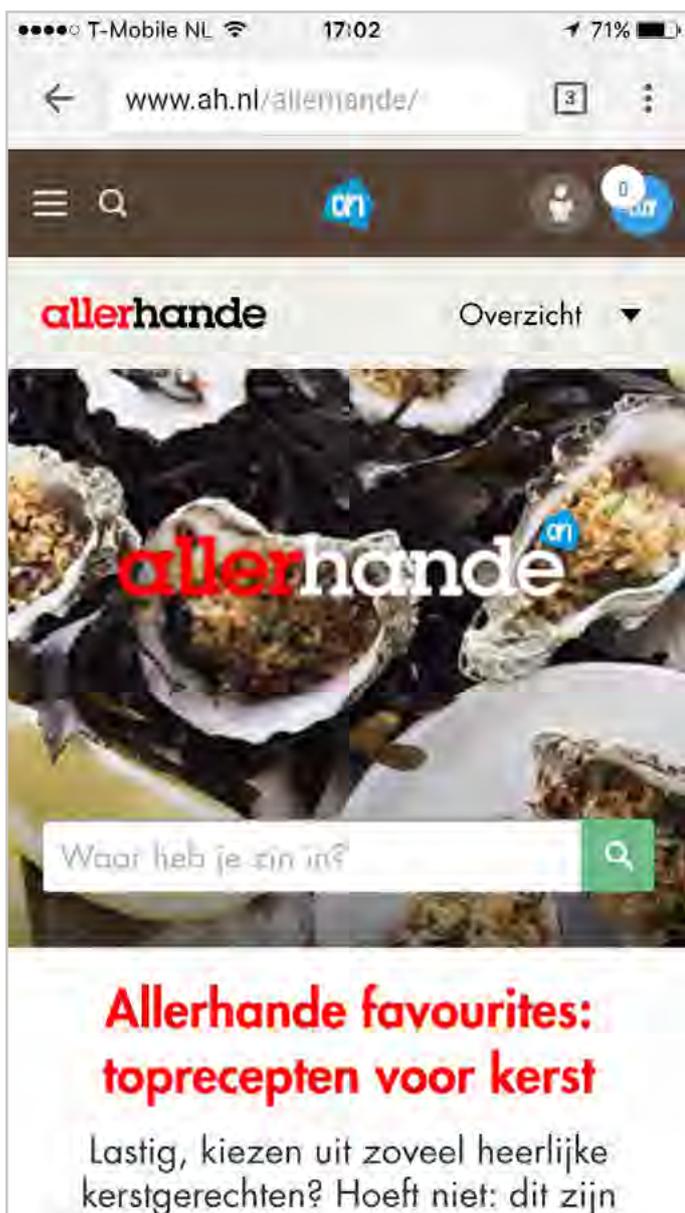
Storming ahead with a total benchmark score of 62%, Albert Heijn is one of the few retailers to provide consistently good experience across virtually all categories and devices. The only exception to this was on iPad where the company scored a mere 33% for its app. Compared to many retailers however, this was still an improvement, with 80% of those benchmarked not having an iPad application at all.

Having addressed all of the basic requirements (zoom features, swipe navigation, etc.), Albert Heijn went on to create a truly omnichannel experience for its customers, managing to maintain both consistent branding and quality. All of Albert Heijn's apps and sites were quick to load – a key

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demand amongst consumers – and incorporated engaging content such as recipes and suggestions. The company even offers a self scan services, allowing users to ring up their products using a mobile device, however this only works when logged onto the Albert Heijn wireless network.

Albert Heijn has clearly shown its commitment to innovation with the result of a consistently good customer experience. This is indicated by the significant gap between its score (62%) and the 26% average scored by our other top 20 Benelux retailers.



Best mobile website

Despite losing marks in the overall benchmark for failing to provide any tablet or mobile applications, Dixons mobile site was far superior to those of the other retailers. Through an intuitive social login and advanced search function, the Dixons' site allows users to seamlessly navigate between various departments and devices.

While the main site does not use responsive design, an SEO-optimised mobile redirect proves equally effective. The site is quick to load and scored 10/10 for its on-site search function. If the marketing team were to develop mobile or tablet applications of a similarly high standard to the website, Dixons will prove a very strong contender in next year's benchmark.



Analysis: Four steps to an effective omnichannel approach

1. Balance unified experiences with device capabilities

When preparing their omnichannel approach, marketers have to walk a fine line between user experience and device capabilities. On the one hand, they should look to create unified experiences across all platforms; on the other, they must play to the specific strengths of each device or platform. As an example, of the few brands that did develop an Android tablet app, many opted to develop a single Android app for use across both tablets and mobiles. While this helped to create a seamless user experience, these apps ended up being stretched on larger tablet screens – a poor use of the additional screen space.

2. Invest in content

In the omnichannel age, engaging content is more vital than ever. As audiences increasingly flit between various applications, platforms and screens, it grows ever harder for marketers to retain their attention. Informative and entertaining content offers the best solution to keeping your customers engaged throughout the buying cycle. By incorporating genuinely helpful content such as recipe suggestions, how-to videos and user guides, marketers not only maintain the interest of potential prospects, but can also encourage additional purchases throughout the process. Albert Heijn achieved this through the creation of a content-driven recipes section, offering videos and how-to guides in an effort to encourage combined purchasing. This ultimately helped the retailer to claim our number one website spot for 2015.

3. Don't be afraid to restructure

It's all too easy for marketers to find themselves working in siloed teams. In order to develop a successful omnichannel strategy, businesses should not be afraid to mix up their teams and establish a wider point of view. Rather than having a web design team, a social media team and a mobile development team, businesses need to encourage collaborative working throughout all stages of the marketing process. This collaborative effort can then be overseen by a decisive – and brand conscious – marketing department.

4. Joined up marketing requires joined up tech

Omnichannel is just as much about finding the right technologies as it is about taking the right approach. In order for a customer's journey to be truly seamless, marketers must ensure a tight integration between mobile, POS, customer data, content management and e-commerce platforms. Developing an omnichannel strategy is about more than just using multiple platforms, it's about building a fully integrated marketing ecosystem. Think long and hard about the strategy you are looking to implement and then select the platforms that make it easiest to enact.

To find out how to improve your mobile e-commerce experience, visit episerver.com





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Together with our Solution Partners, we back you up all the way, throughout the project and beyond.

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At Episerver, we believe that digital transformation is a journey. We have been guiding customers for more than 20 years in providing outstanding digital experiences. Today our network of 880 partners, in 30 countries, supports 8,800 customers with 30,000 websites. Our customers include American Express, Canal Digital, Electrolux, KLM, Lloyds Bank, Mazda, Pizza Hut, Sony, Toshiba, and Walmart.

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