

COUNTRY: BELGIUM

BACKGROUND

The Copenhagen Economics pan-European consumer survey (2025) included 24,995 respondents from the EU, with 1,109 from Belgium. This group comprised of 30% young individuals, 53% from lower-income backgrounds, and 29% living in rural areas. For EU-level findings, refer to the study "Value of e-commerce for EU consumers."

Copenhagen
Economics



BELGIAN CONSUMERS VALUE AFFORDABILITY AND ACCESSIBILITY

Price is the top priority for Belgian consumers purchasing new clothes, both online and offline, which suggests that consumers may be notably sensitive to price. According to our survey, 70 per cent of consumers surveyed rank price as the most important criteria when buying new clothes.



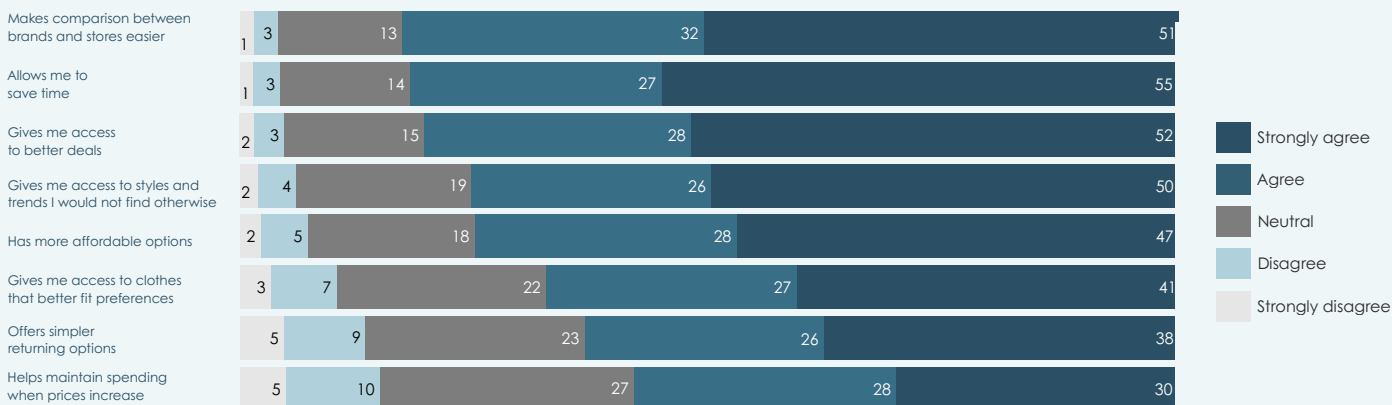
70%

of respondents rank price as the most important factor when buying clothes

Share of respondents that ranked price as the first (1) most important factor, when buying new clothes, when asked the question: "When buying new clothes, which of the following criteria are the most important to you? Please rank them in order of importance, with 1 being the most important". The sample size for this question consists of 1,109 responses. Possible answers included: "Price", "Product quality", "Home delivery and easy return", "Availability of sizes", "Convenience", "Alignment with current trends" and "Try before you buy".

Consumers recognise several advantages of online shopping, such as affordability, accessibility and convenience

Percentage share of respondents answering statements, "Shopping online..."



The survey responses show that Belgian consumers value affordability when shopping online, 80 per cent of respondents agree with the statement "Shopping for clothing online gives me access to better deals than physical stores". Also, 75 per cent of respondents agree with the statement "Shopping online gives access to more affordable options".

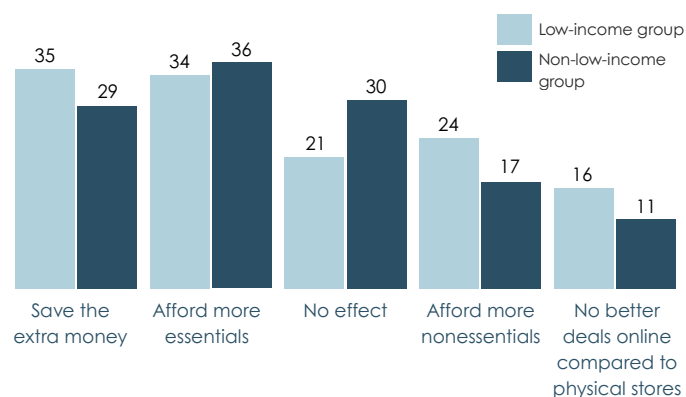
Accessibility and convenience are also relevant, with 76 per cent of respondents agreeing with the statement "Shopping for clothing online gives me access to trends and styles I would not find otherwise" and 83 per cent of respondents agreeing with the statement "Shopping for clothing online allows me to save time".

LOWER-INCOME RESPONDENTS TEND TO PERCEIVE ONLINE SHOPPING AS HAVING HIGHER BENEFITS ON THEIR SAVINGS

Compared to other respondents, low-income consumers surveyed are more likely to report that online shopping helps them save money (35 per cent versus 29 per cent) and afford more nonessentials (24 per cent versus 17 per cent).

Low-income respondents perceive stronger positive spillovers from online shopping on their other expenses

Share of respondents answering how shopping online has affected their spending on other expenses



The figure shows the share of respondents who answered the question: "How has online shopping mostly affected your spending on other types of expenses? Select all that apply" The sample size for this question consists of 695 responses.

RESPONDENTS LIVING IN MORE REMOTE AREAS BENEFIT MOST FROM INCREASED ACCESSIBILITY FROM ONLINE SHOPPING

Rural consumers surveyed report that it is more difficult to find suitable clothing from physical stores nearby compared to urban and suburban respondents. Also, they typically take more time to reach the nearest clothing store considered a suitable alternative to shopping online.

The top figure shows the share of respondents that answered "Very difficult" or "Somewhat difficult" to the question: "How easy or difficult is it to find physical clothing stores near you where you would consider buying clothes?" The sample size consists of 956 responses, of which 271 are rural responses. Those that did not disclose their rural status or were not sure about the ease of finding physical stores nearby have been excluded (153 observations). Rounded to the nearest per cent.

The bottom figure shows the share of respondents that inputted a time below 20 minutes to the question: "How long (in minutes) does it typically take you to reach the nearest clothing store you would consider a suitable alternative to shopping online?" The sample size consists of 964 responses, of which 277 are rural responses. Those that did not disclose their rural status or inputted a time greater than 180 minutes have been excluded (145 observations). Rounded to the nearest per cent.



43% of rural respondents find it **difficult to find physical clothes stores** near their homes *versus 34% of non-rural respondents*

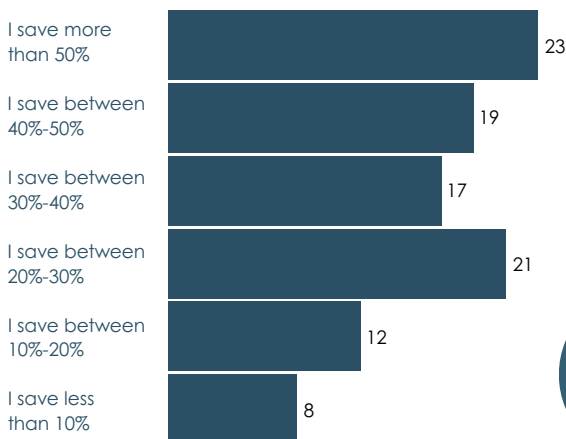


75% of rural respondents report typically **taking more than 20 minutes to reach the nearest clothing store** *versus 63% of non-rural respondents*

Non-rural consumers are those who answered 'City or other densely populated area' or 'Town or suburb' to the question: "Which best describes the area where you currently live".

The average perceived savings rate for shopping online is 34 per cent

Percentage share of respondents reporting their perceived savings rate for shopping online compared to shopping in physical stores



34%
average
perceived
saving rate

CONSUMERS SAVE AN AVERAGE OF EUR 14.40 PER MONTH THROUGH SHOPPING FOR CLOTHES ONLINE

On average, respondents estimate that buying online allows them to save 34 per cent with respect to buying similar items in physical stores.

For SHEIN specifically, our consumer survey reveals that respondents estimate a savings rate of 46 per cent when shopping on SHEIN compared to physical stores.

The figure shows the share of respondents that answered the question: "How much money do you save by purchasing clothing items online compared to buying similar items in physical stores?" The question was only answered by respondents who agreed with, or were neutral to, the statement: 'Shopping online allows me to save money compared to in-store shopping.' This was 88 per cent of respondents, and the sample size consists of 973 responses.



We estimate that **respondents save an average of EUR 14.40 per month through online shopping**, equivalent to approximately 15% of monthly clothing and footwear spending of Belgian households

Monthly savings are calculated using the perceived savings rate, monthly clothing purchases, and the proportion bought online reported by respondents.

CONSUMER SAVINGS FROM PURCHASING CLOTHING ONLINE MAY TOTAL UP TO EUR 662 MILLION PER YEAR IN BELGIUM



€127.50

Annual savings online per online consumer in Belgium



€663 million

Annual consumer savings

This calculation assumes that the level of savings reported by survey respondents could be achieved by all Belgian consumers buying clothes online. Savings are calculated by age group, then aggregated and weighted. Yearly savings are rounded up to the nearest million.