



Survey

# Ecommerce Shopping Habits in Lebanon

July 2019

# About the Survey

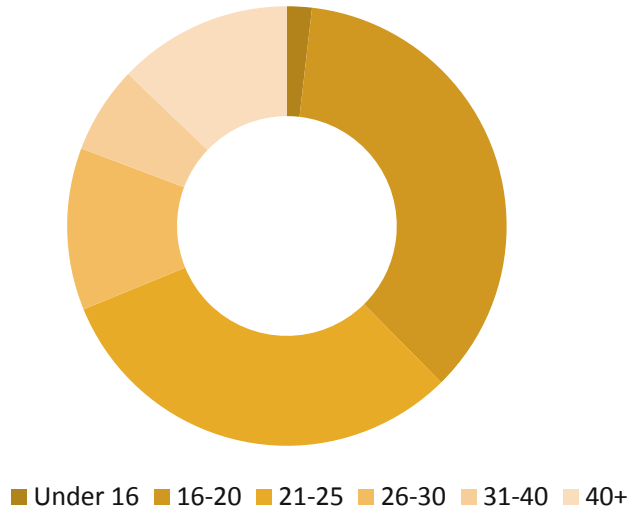
Brandcell Consulting has conducted a survey to further understand the ecommerce market in Lebanon and its perception.

Over 100 people participated in the survey through Survey Monkey online questionnaire. **This revealed the ecommerce shopping habits in Lebanon and uncovered opportunities for retailers.**

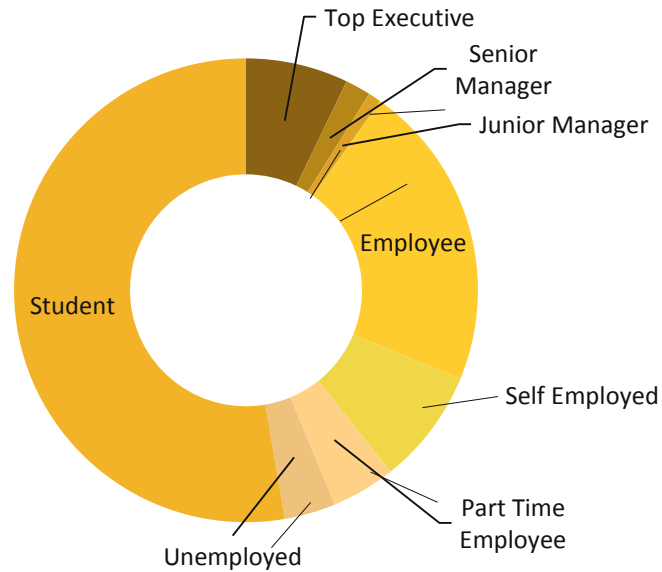


# Respondents Profile

## Age



## Professional Status

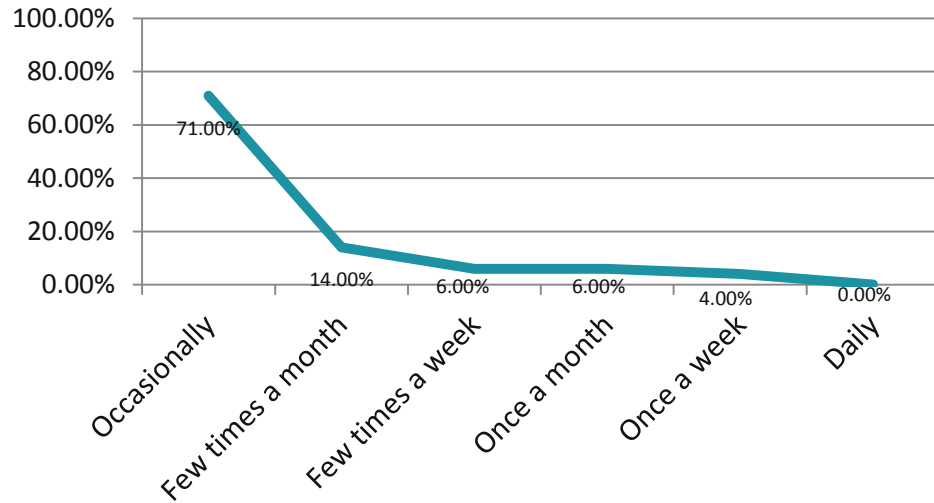


**64%**  
*Shop online*

**36%**  
*Don't shop online*

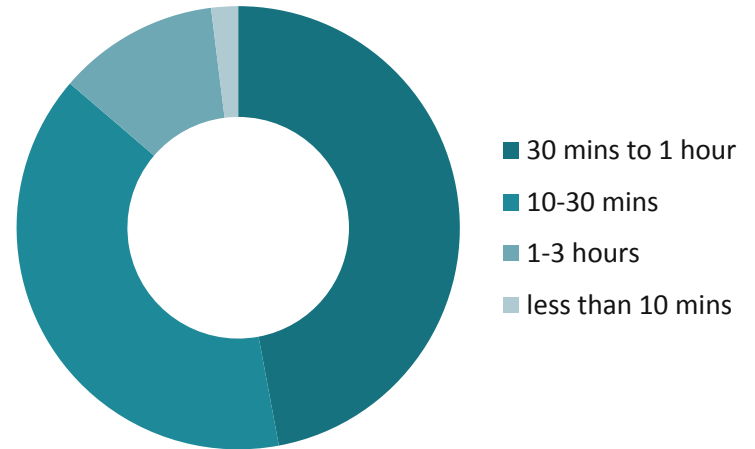
# Shopping Habits

## Frequency



30% are considered frequent shoppers

## Duration of Shopping Session



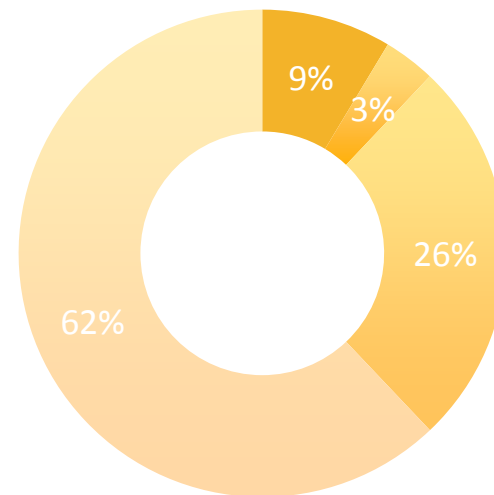
On average, 44 minutes are spent on each session

# Shopping Habits

## Shopping Times



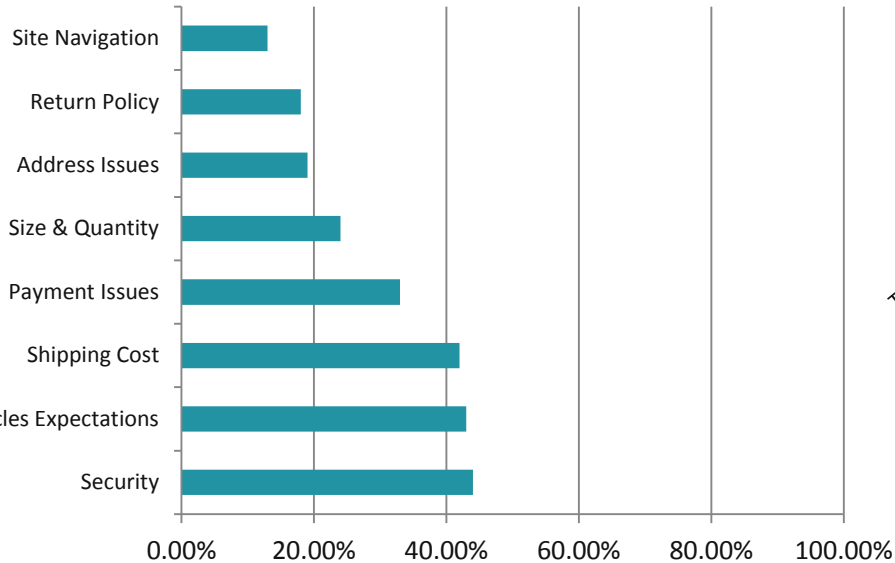
## Shopping Period



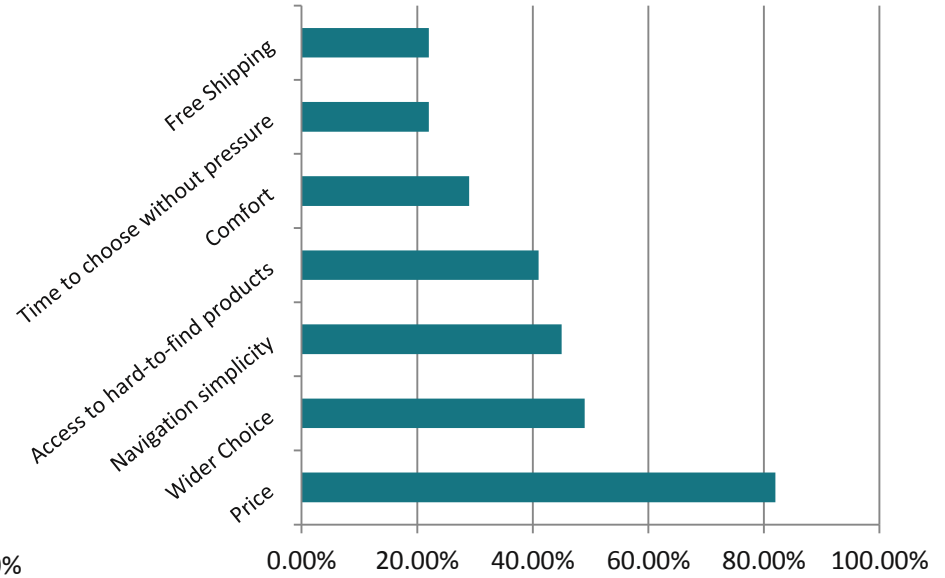
- Special Occasions
- Specific Seasons
- Sales
- No Specific Period

# Reasons for and against Ecommerce

## E-commerce Obstacles



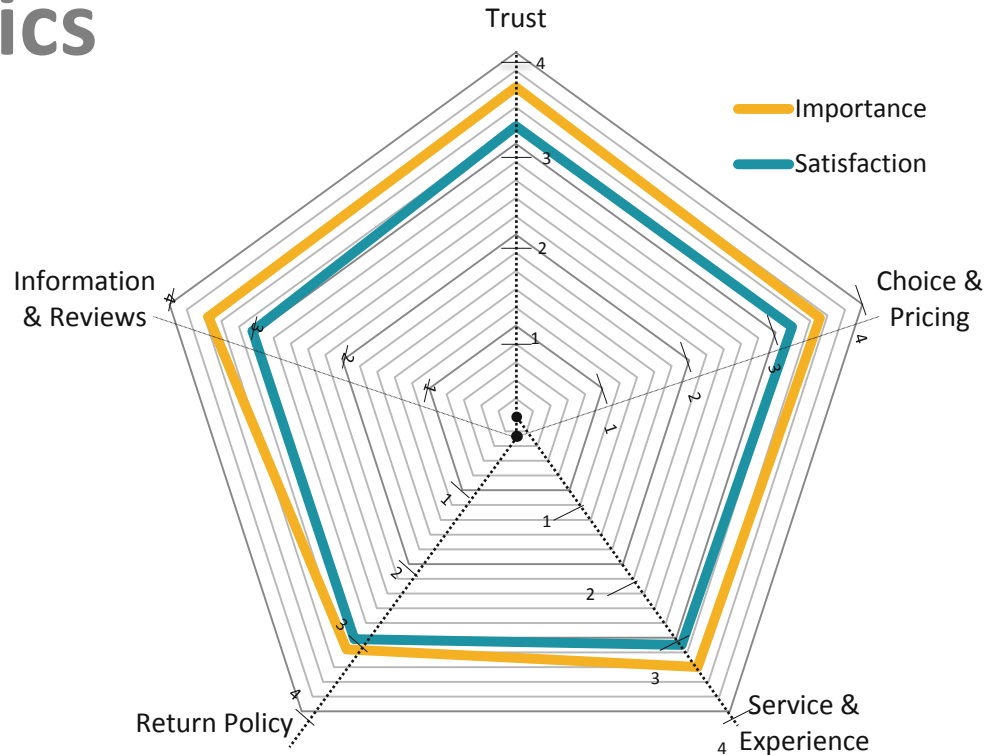
## E-commerce Motivation



The above portray both the pains and gains of online shopping, pricing and choice being the most prominent gains across all respondents and Security & Expectations being the biggest pains.

# E-Commerce Metrics

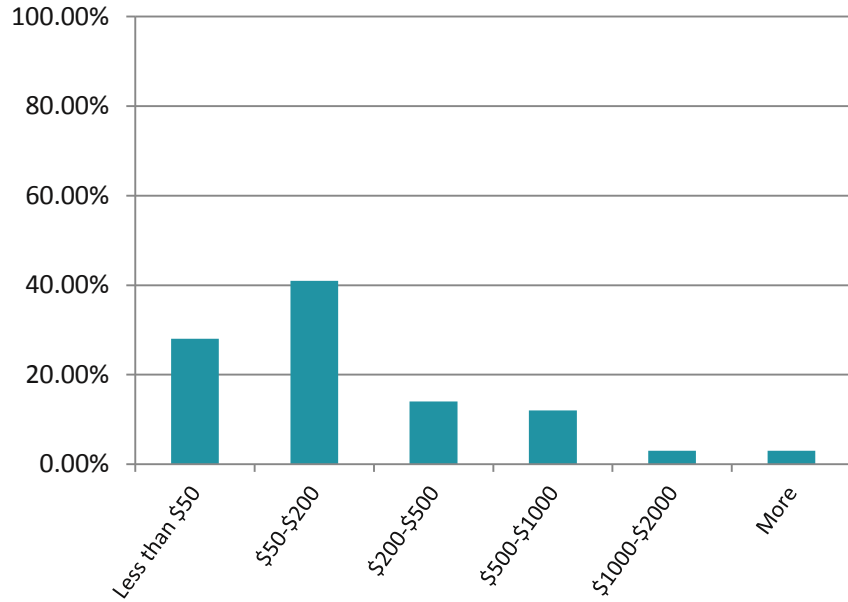
- It is clear that throughout all metrics, there is an underperformance, mostly in regards to trust, and this is a major factor holding back consumers from shopping online.
- Security and Trust are the major pain points and obstacles for users to shop online, as are they the most in which companies are underperforming.



**Trust:** Security; Reputation  
**Choice & Pricing:** Product Prices; Product Choice  
**Service & Experience:** Webs/E-Platform Design; Simplicity of use; CS  
**Return Policy:** Return Policy  
**Information & Reviews:** Product information & Reviews

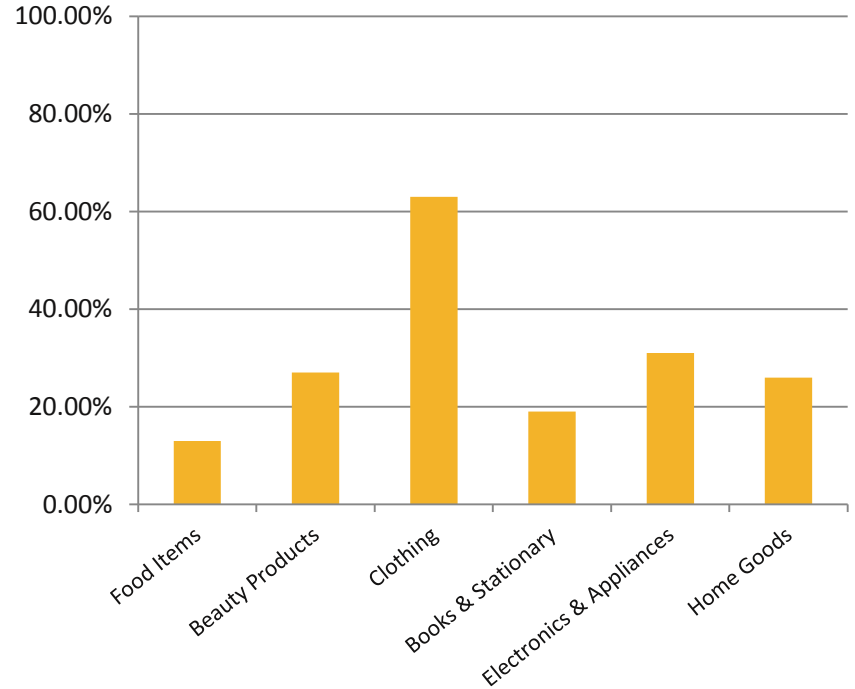
# Purchasing Behavior

## Spending\*



\*YEARLY SPENDING

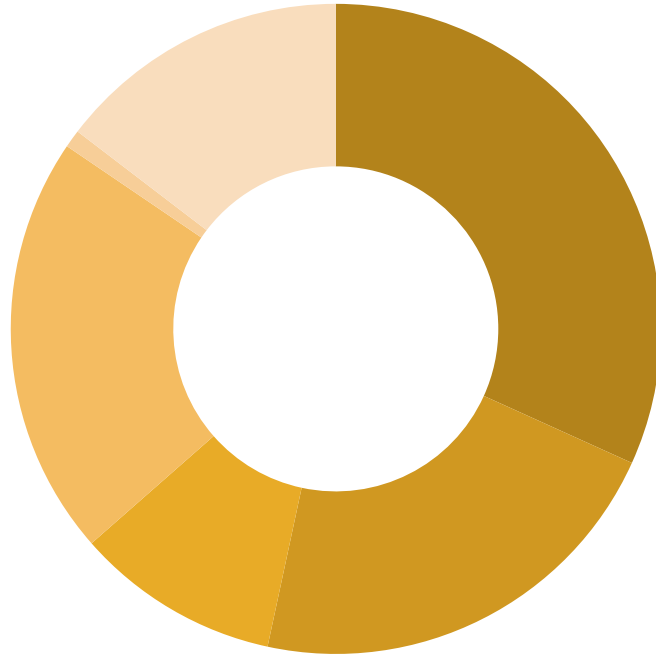
## Nature of Purchases





# Purchasing Behavior

Source



■ Global Websites

■ Local Websites

■ Brand Websites

■ Social Media

■ Phone Calls

■ Mobile Applications

79.7%

*Shop using their  
smartphone*

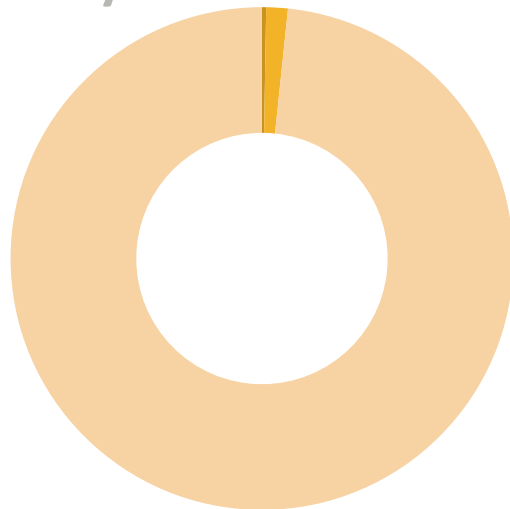
10.2%

*Don't mind sharing data  
to improve their  
experience*

# Outlook on Local E-commerce

- The fact that 98% prefer to pay cash, shows a lack of trust between users and local stores.

## Payment Preferences



■ Paypal ■ Credit/Debit Card ■ Cash on Delivery

# 28.6%

*Don't trust local  
E-platforms and stores*

# 38%

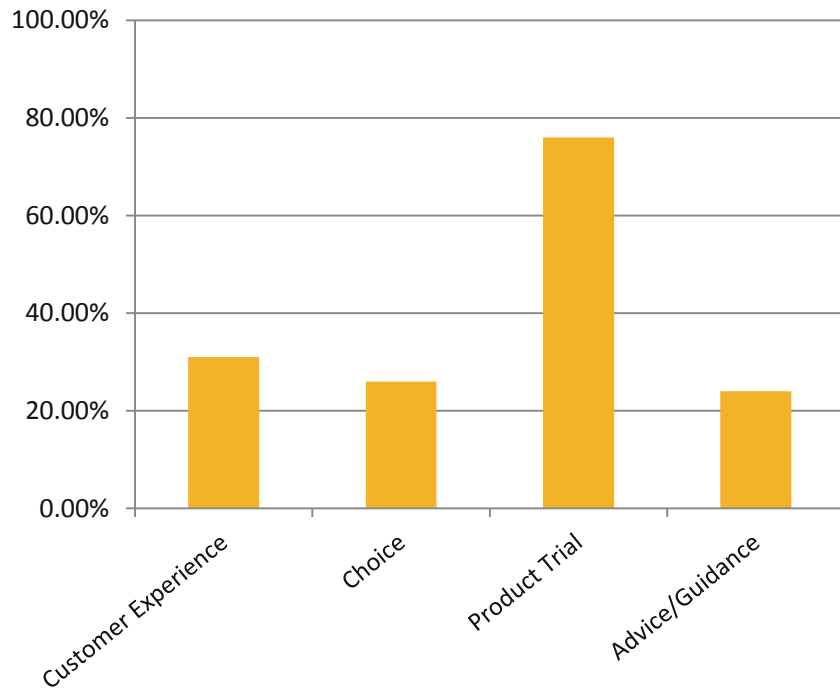
*Don't trust local  
online payment*

# Physical Stores

## Importance of Physical Store



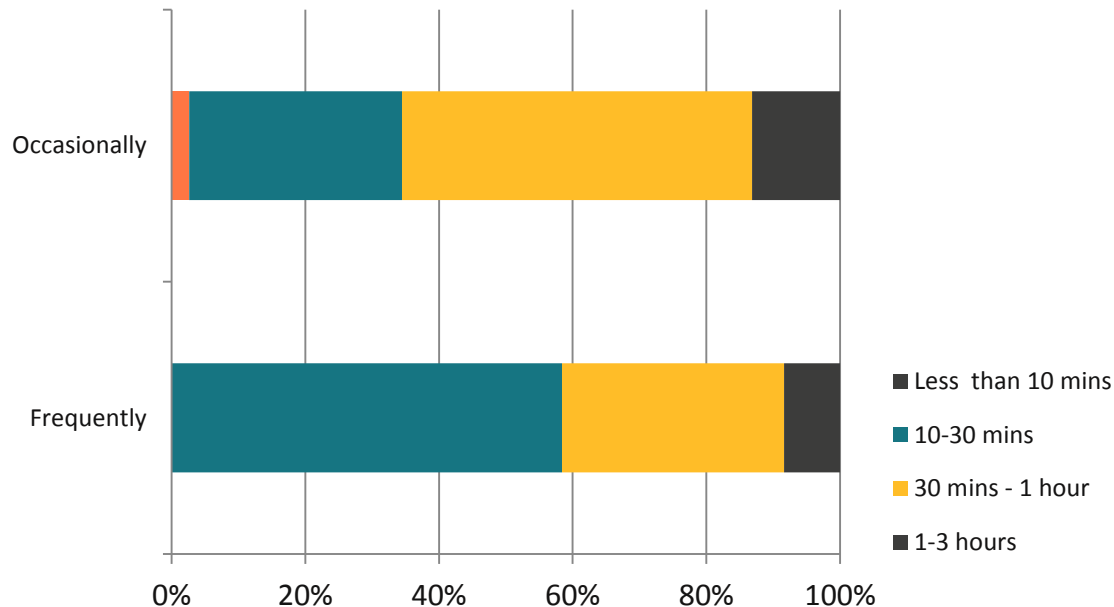
## Reasons for Choosing Physical Stores over Online



# Who's Using E-Commerce?

*Those using E-commerce are "Frequent" and "Occasional" Shoppers*

- Frequent shoppers spend less time on each shopping session, could be since frequent shoppers will tend to buy less expensive items as they're happening more often.



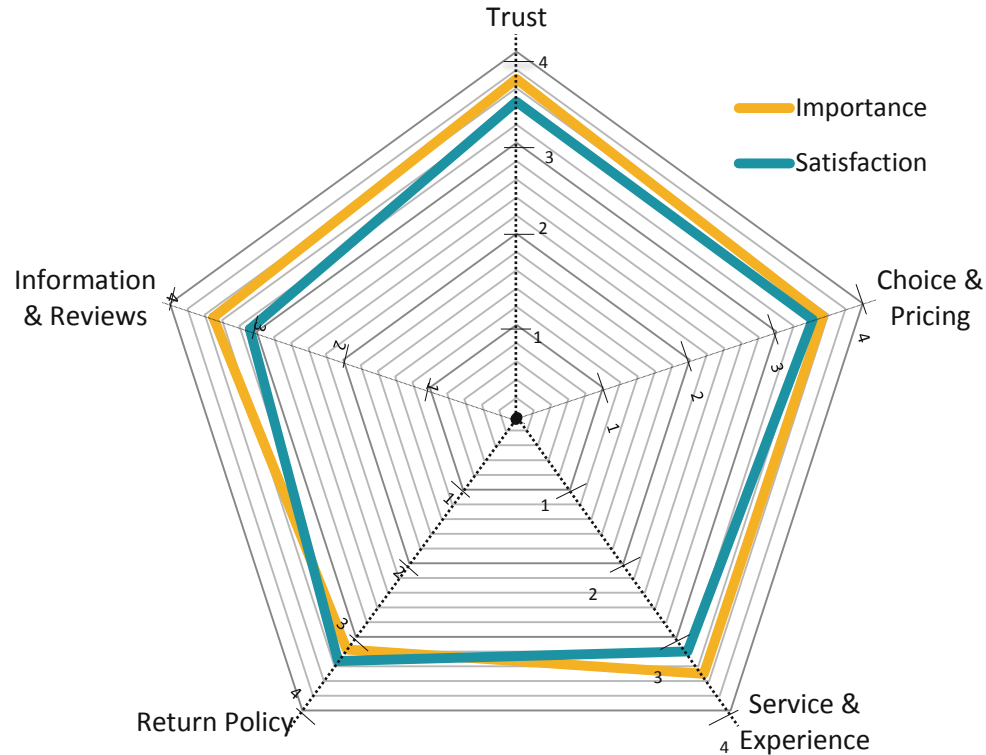
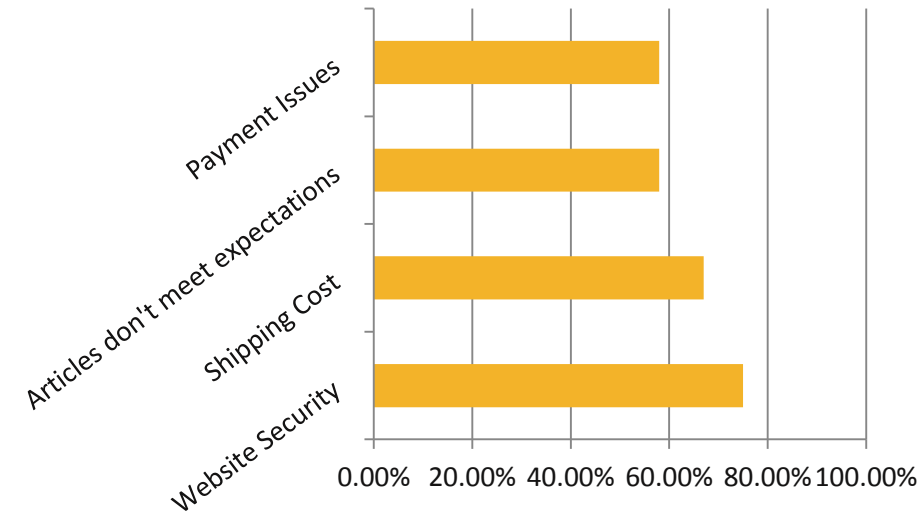
# Who is the Frequent Shopper?

Age:

26-30– 41.7%

40+ - 25%

## Online Shopping Preventions



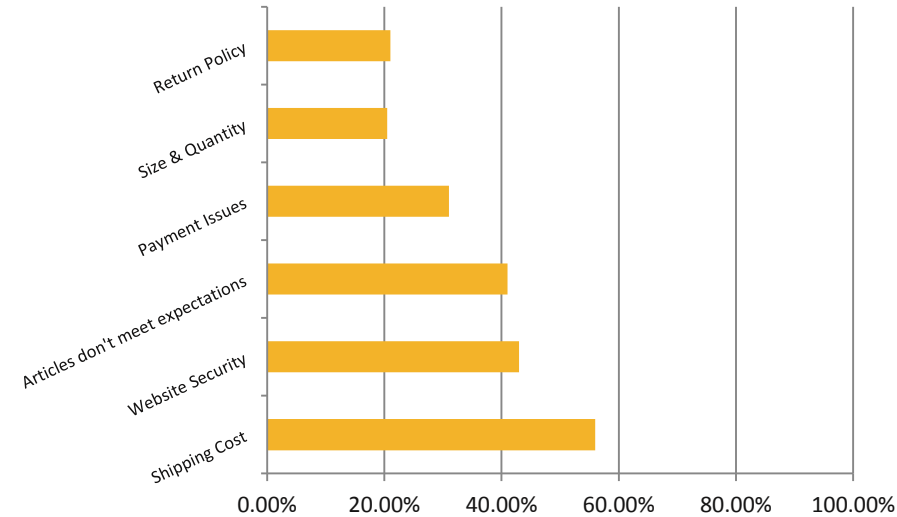
# Who is the Occasional Shopper?

Age:

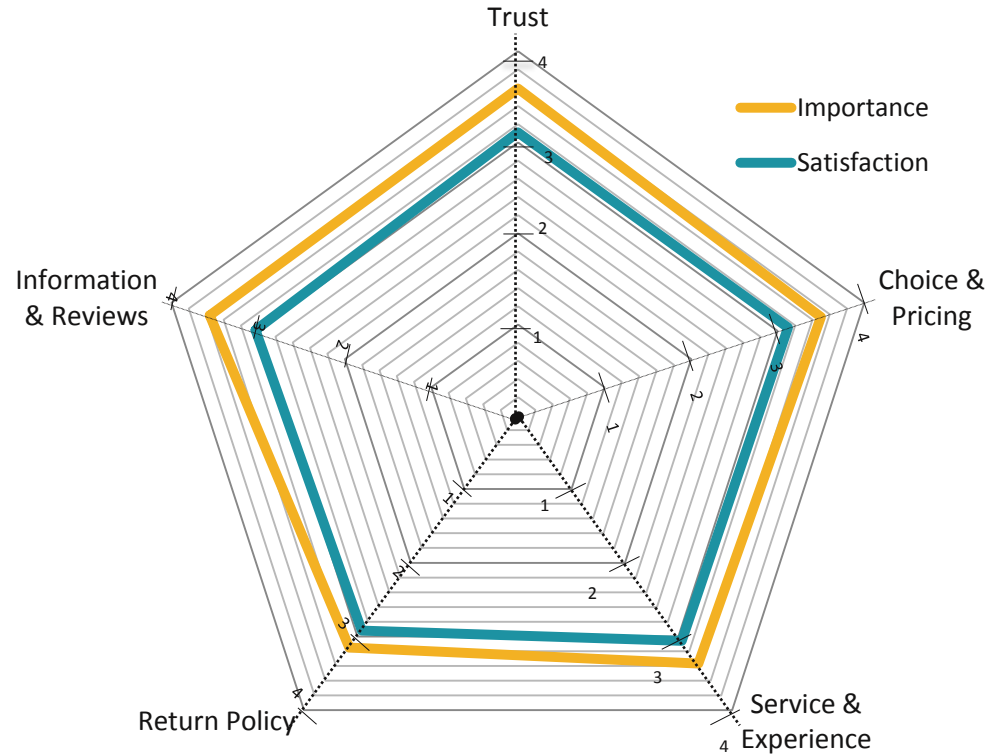
16-20 – 38.5%

21-25 - 23%

## Online Shopping Preventions



## Importance vs. Satisfaction



# Who is the Non-Shopper?

Age:

16-20 – 43.6%

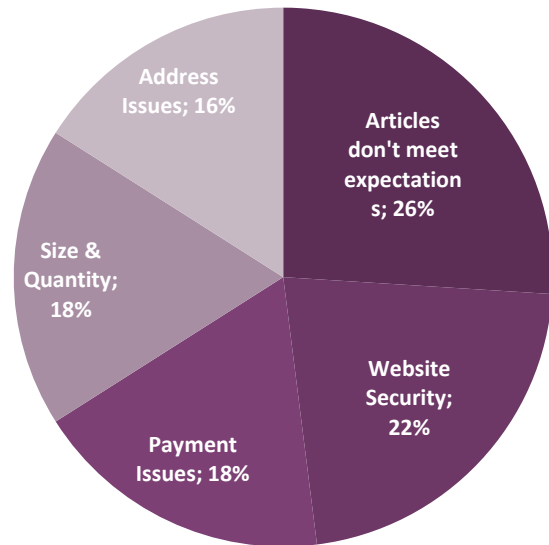
21-25 - 33.3%

65% say Its important to have a physical store to be able to check what they've seen online.

## When they do Shop



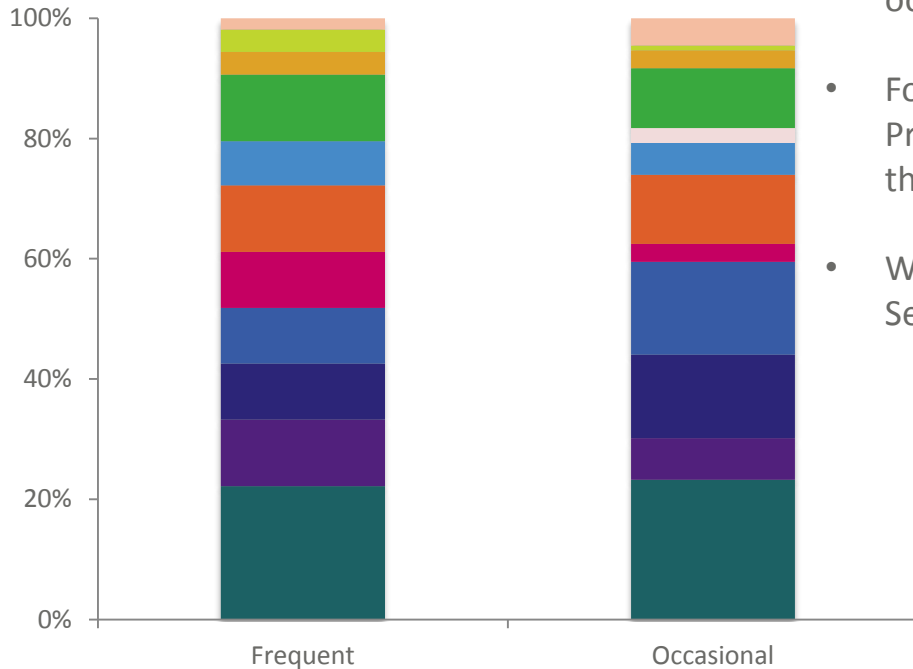
## Online Shopping Preventions



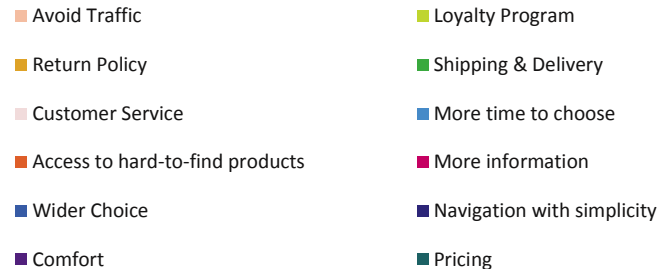
61% prefer to still go to physical stores because of Product trials.

# E-Commerce shoppers motivations

## Motivations to Shop Online



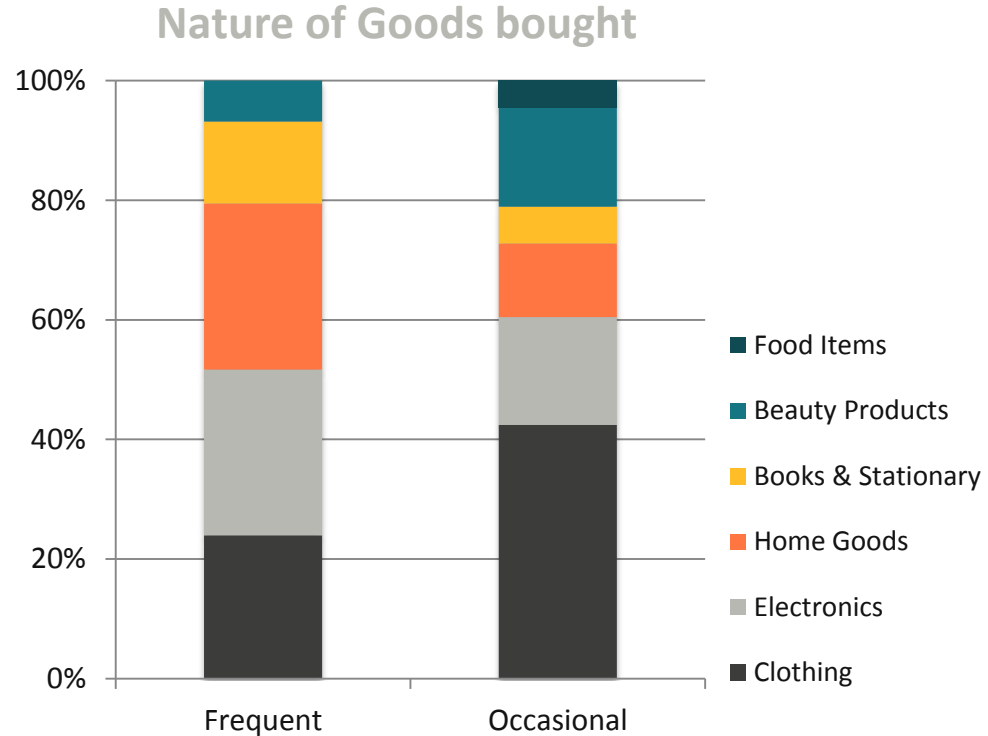
- Its evident that pricing is the main motivator for both occasional and frequent shoppers to go online.
- For the frequent shopper, Comfort, Information on Products and Loyalty Programs play a bigger role than they do for occasional shoppers.
- Whilst for the occasional; Wider choice, and Customer Service matter more than they do for the frequent.





# E-Commerce shoppers habits

- The following illustration compares the difference in goods bought by both types of shoppers.
- Occasional buyers purchases are mostly dominated by clothing and Electronics, rarely food items.
- Whilst Frequent buyers have a more balanced and spread out mix, with Home goods, Electronics and Clothing taking up the most.



# Shoppers by Category:

## Clothing

62.9%

### Profile

- 36% → 16-20
- 20% → 26-30
- 71% → Occasionally
- 83% → 10mins-1 hour
- 47% → \$50-\$200

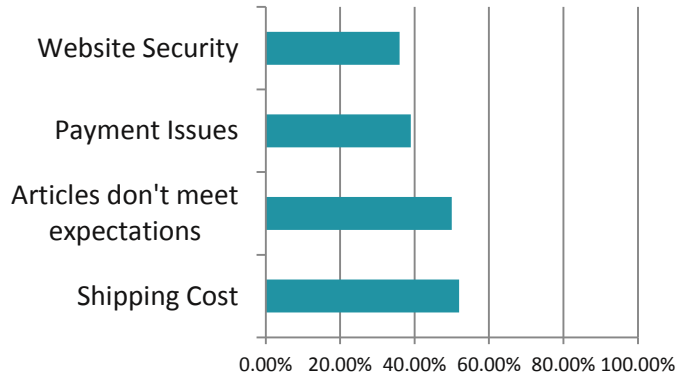
### What they're also buying

- 32% → Electronics
- 30% → Home Goods

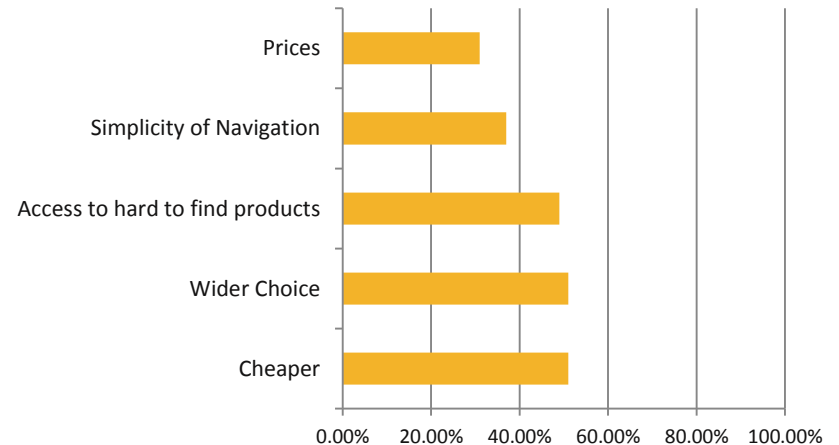
### Source of dissatisfaction

- Return Policy
- Customer Service
- Product Information & Reviews
- Security

### Main Shopping Obstacles



### Motivation to Shop



# Shoppers by Category:

31.4%

## Electronics

### Profile

- 32% → 40+
- 46% → 16-20 & 26-30
- 60% → Occasionally
- 95% → 10mins-1 hour

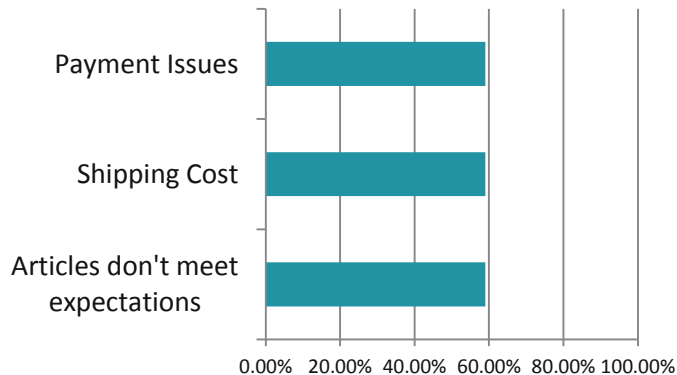
### What they're also buying

- 64% → Clothing
- 36% → Home Goods

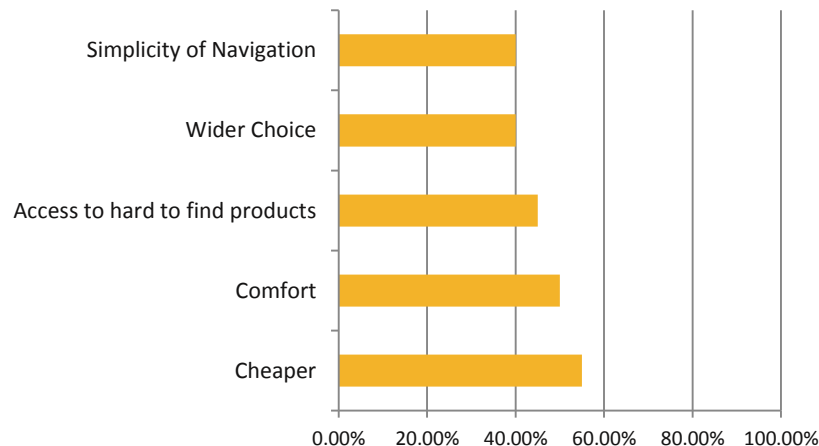
### Source of dissatisfaction

- Customer Service
- Website Security
- Product Information & Reviews

### Main Shopping Obstacles



### Motivation to Shop



# Shoppers by Category:

## Beauty Products

27.1%

### Profile

- 89% → 16-25
- 77% → Occasionally
- 84% → 10mins-1 hour
- 61% → \$50-\$200

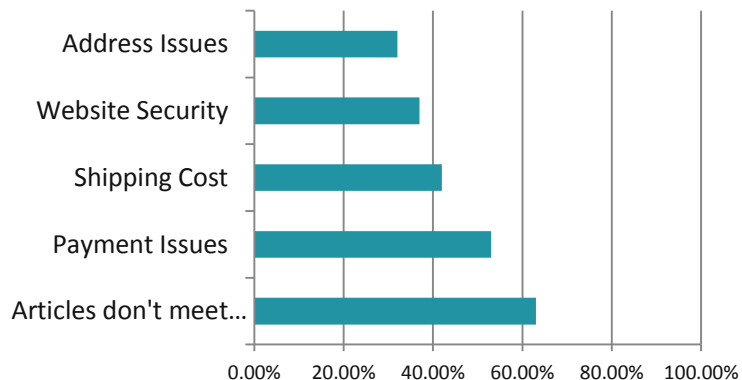
### What they're also buying

- 58% → Clothing
- 21% → Electronics

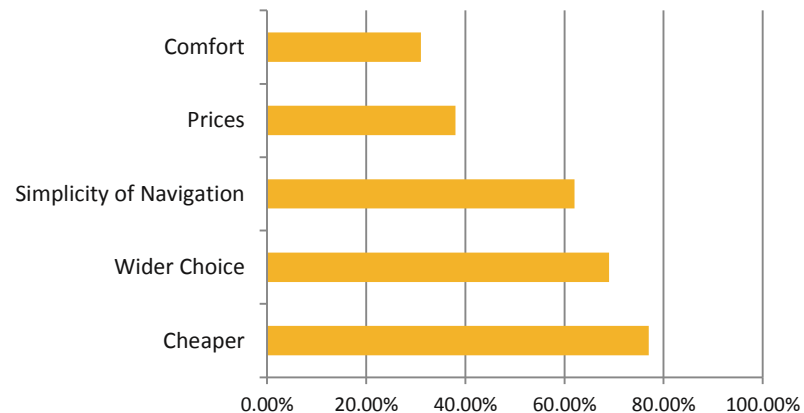
### Source of dissatisfaction

- Return Policy
- Product Information & Reviews
- Customer Service
- Security

### Main Shopping Obstacles



### Motivation to Shop



# Shoppers by Category:

## Home Goods

25.7%

### Profile

- 33% → 26-30 years old
- 50% → Frequent shoppers
- 65% → Spend \$50-\$500

### What they're also buying

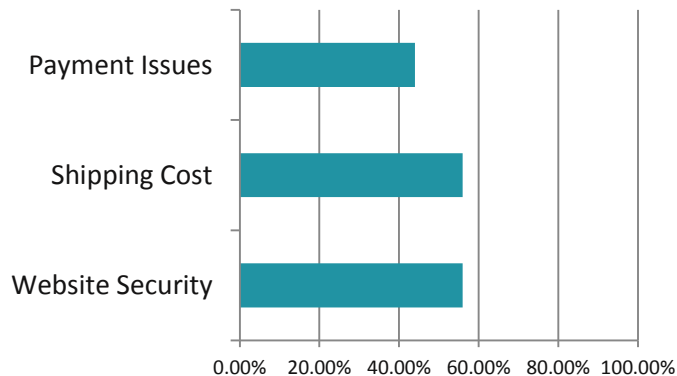
- 72% → Clothing
- 44% → Electronics

### Source of dissatisfaction

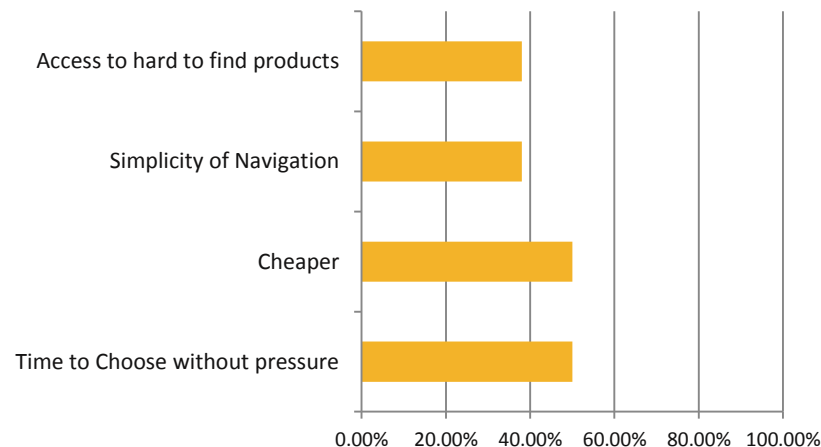
- Product information & Reviews
- Return Policy
- Reputation

- There's a high level trust in Lebanese E-commerce and online payments of 83%.

### Main Shopping Obstacles



### Motivation to Shop



# Shoppers by Category:

## Books & Stationery

18.6%

### Profile

- 39% → 16-25
- 31% → 40+
- 50% → Occasionally
- 100% → 10 mins. to 1 hour
- 33% → Less than \$50

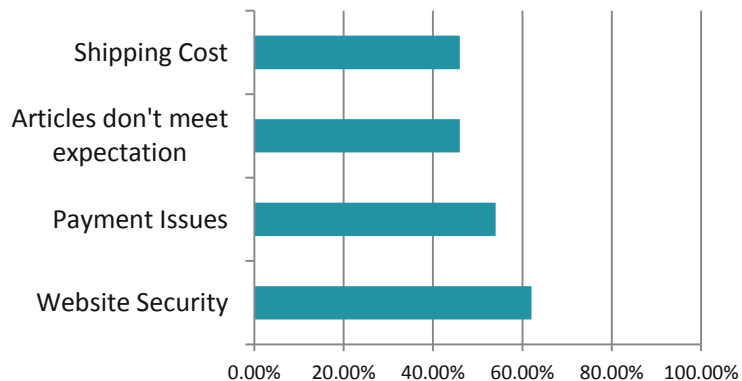
### What they're also buying

- 54% → Electronics & Appliances
- 38% → Home Goods
- 38% → Clothing

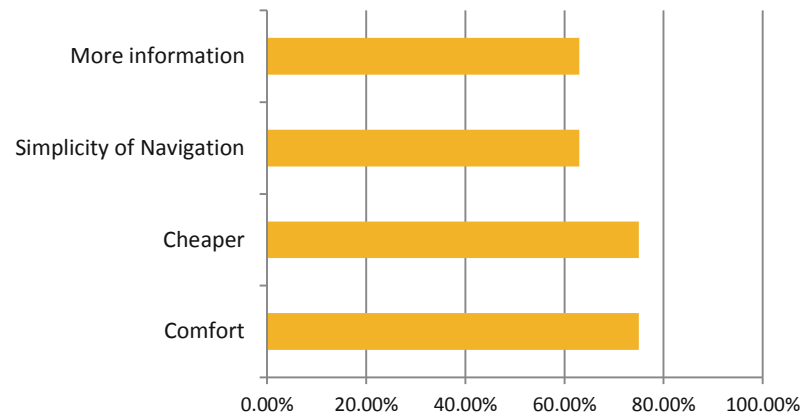
### Source of dissatisfaction

- Return Policy
- Product Information & Reviews
- Product Prices

### Main Shopping Obstacles



### Motivation to Shop



# Shoppers by Category:

12.9%

## Food Items

### Profile

- 89% → 16-25
- 67% → Occasionally
- 100% → 10mins-1 hour
- 44% → Less than \$50
- 44% → \$50-\$200

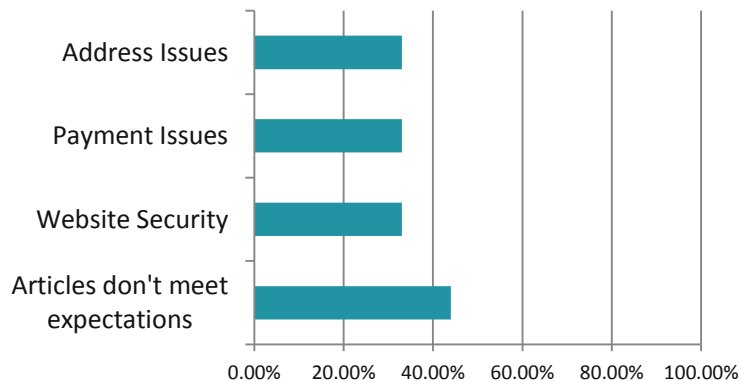
### What they're also buying

- 33% → Books & Stationary
- 22% → Beauty Products
- 22% → Electronics

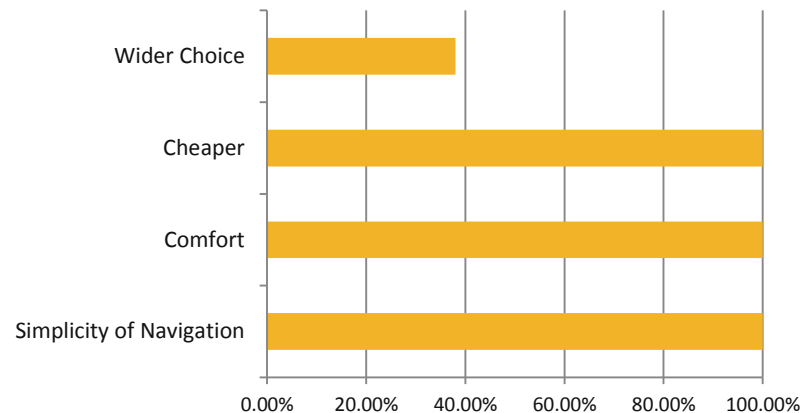
### Source of dissatisfaction

- Return Policy
- Product Information & Reviews
- Reputation
- Product Prices

### Main Shopping Obstacles



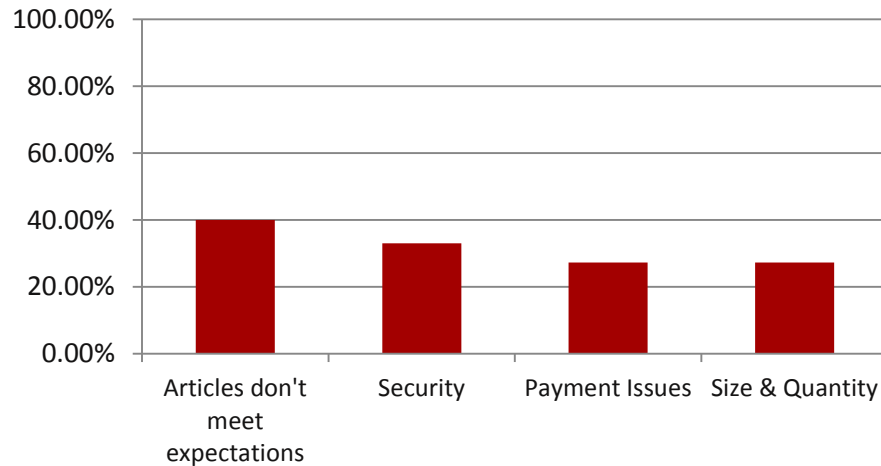
### Motivation to Shop



# Non-Shoppers

*36% of those surveyed don't shop online, although more than 85% of them do believe that their e-commerce habits will become more prominent 5 years from today.*

## Non Shoppers Pain Points



Clearly non-shoppers mainly avoid e-commerce for security issues which is linked to payment as well as trying and feeling the clothes. Not surprisingly 74% don't trust online payments and 82% prefer to pay through cash on delivery. Concerning security issues, only 14% don't mind sharing data for better recommendations.

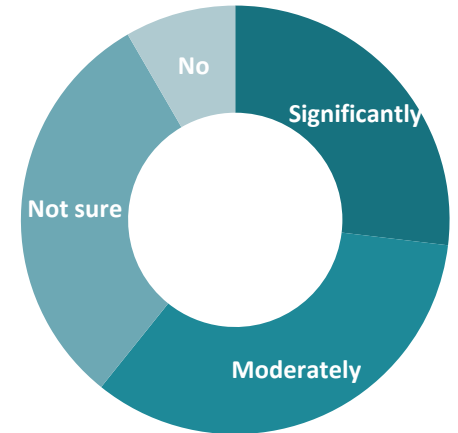


# Key Takeaways

*36% of those surveyed don't shop online, although more than 85% of them do believe that their e-commerce habits will become more prominent 5 years from today.*

- Majority of respondents (64%) do shop online, however only a mere 22% use local platforms, which is mainly due to a lack of trust in the stores as well as payment security. **This shows that there is great potential for firms to either introduce or improve their current E-commerce.**
- 80% of the e shoppers shop through their smartphones and more often by night after work or study. **This could represent an opportunity of growth for retailers opening physical stores during the day.**
- The main e shopping motivations besides price is having time to choose without pressure, having simple navigation and more information, **all service and experience related points.**
- Finally **the e shoppers are mostly young (16-30y old)** and the main item they are buying is clothing (63%) because they are enjoying good prices, wider choice and simple navigation.

Will Your Portion of online shopping increase within 5 years



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