



Survey

Ecommerce Shopping Habits in Lebanon

July 2019

About the Survey

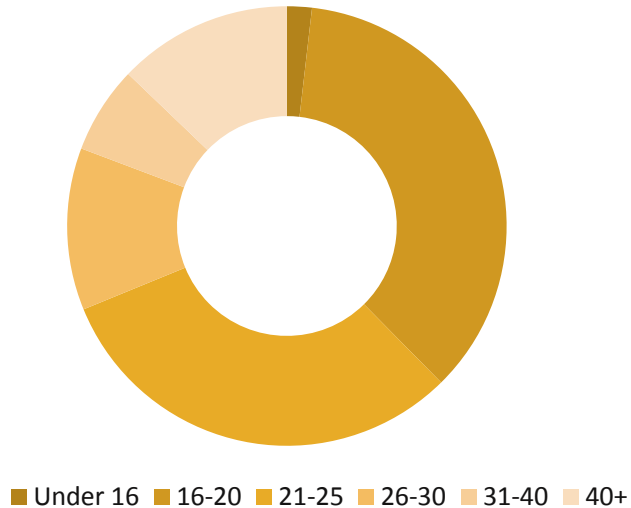
Brandcell Consulting has conducted a survey to further understand the ecommerce market in Lebanon and its perception.

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.**

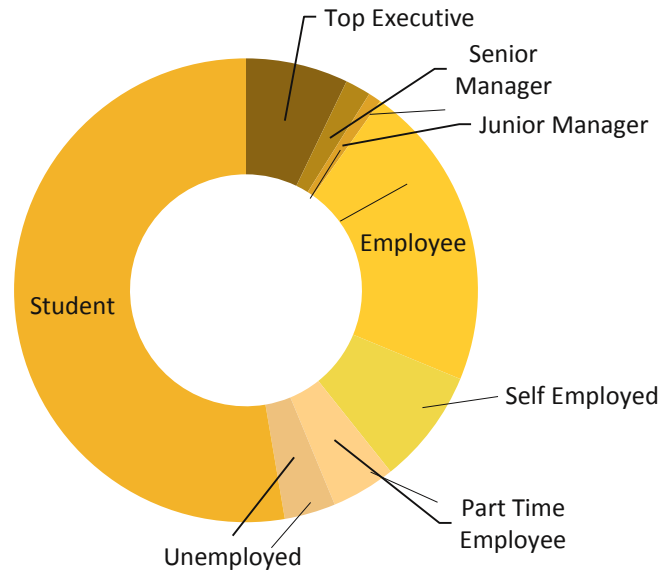


Respondents Profile

Age



Professional Status

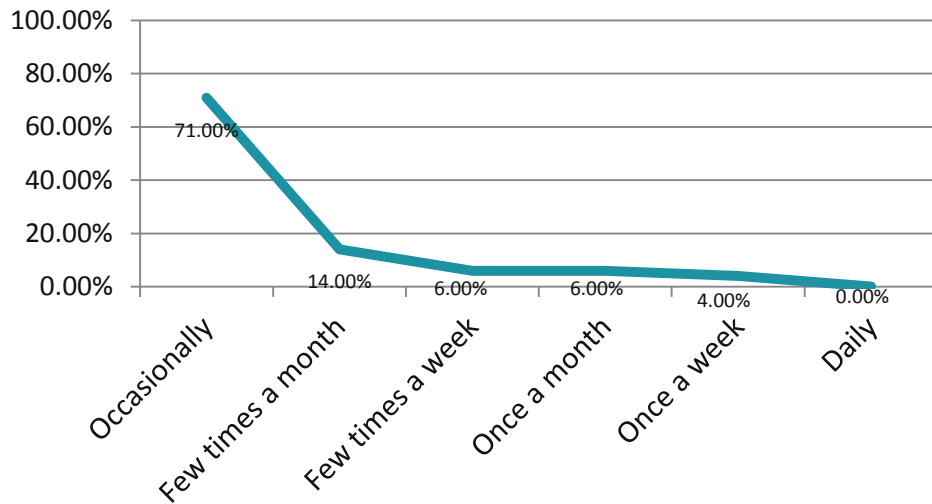


64%
Shop online

36%
Don't shop online

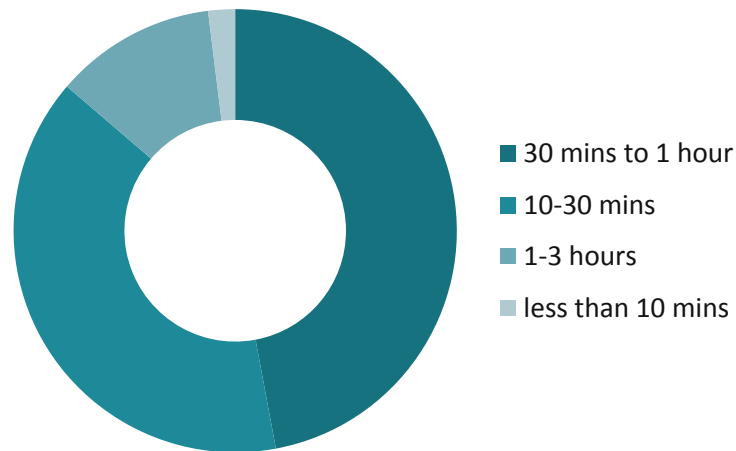
Shopping Habits

Frequency



30% are considered frequent shoppers

Duration of Shopping Session



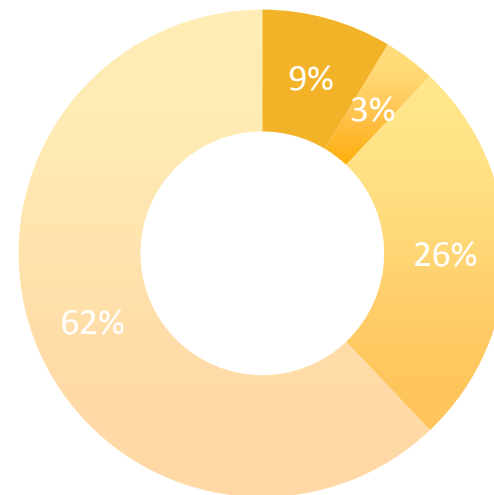
On average, 44 minutes are spent on each session

Shopping Habits

Shopping Times



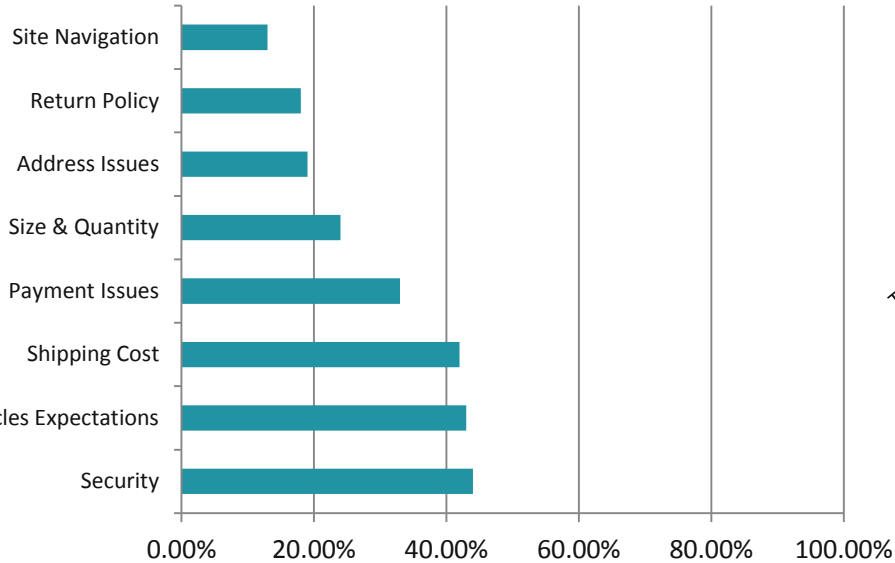
Shopping Period



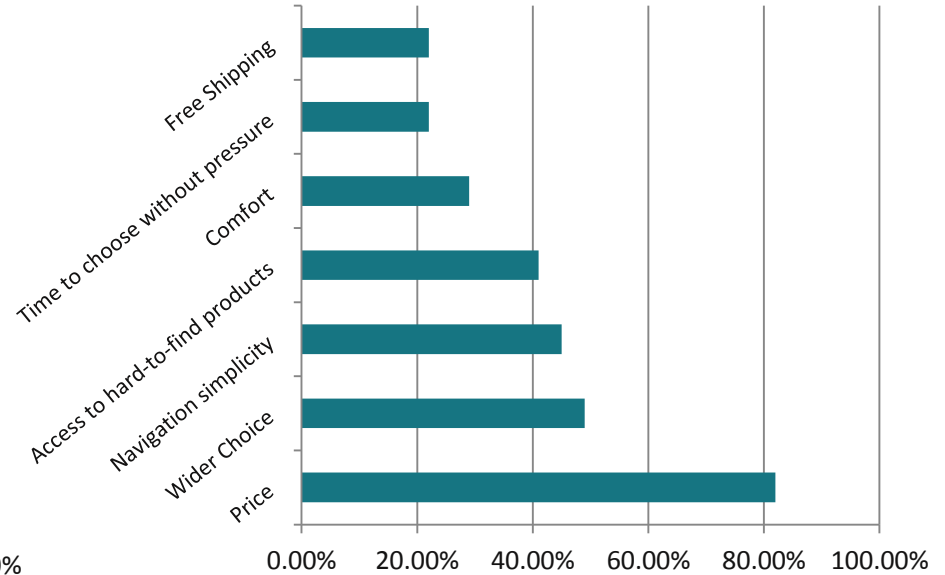
- Special Occasions
- Specific Seasons
- Sales
- No Specific Period

Reasons for and against Ecommerce

E-commerce Obstacles



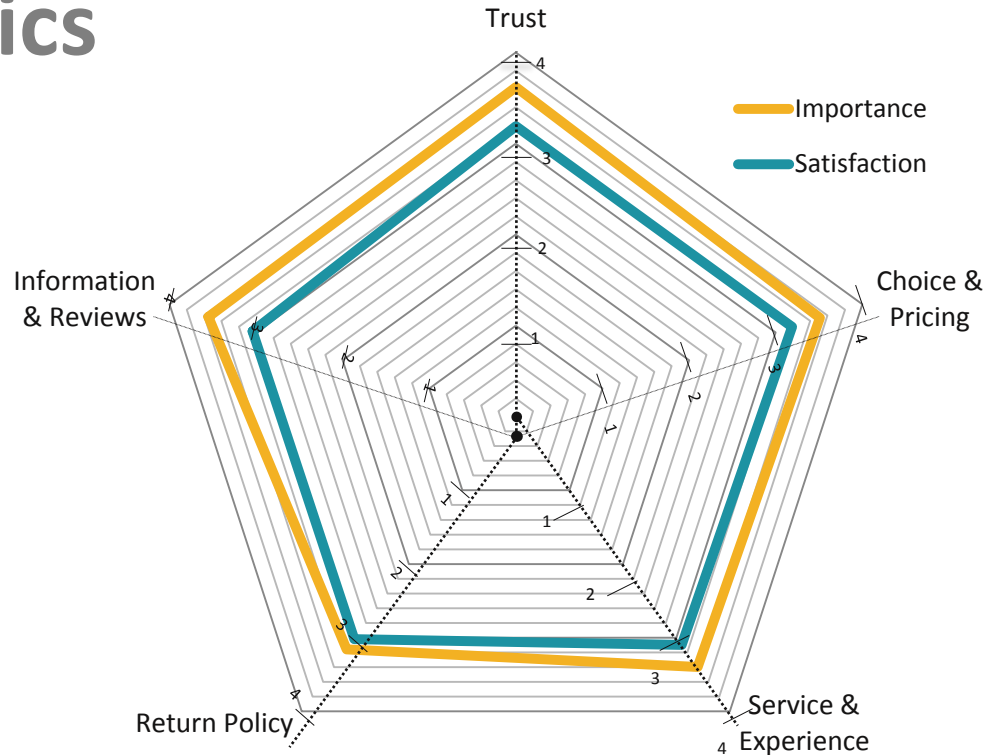
E-commerce Motivation



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

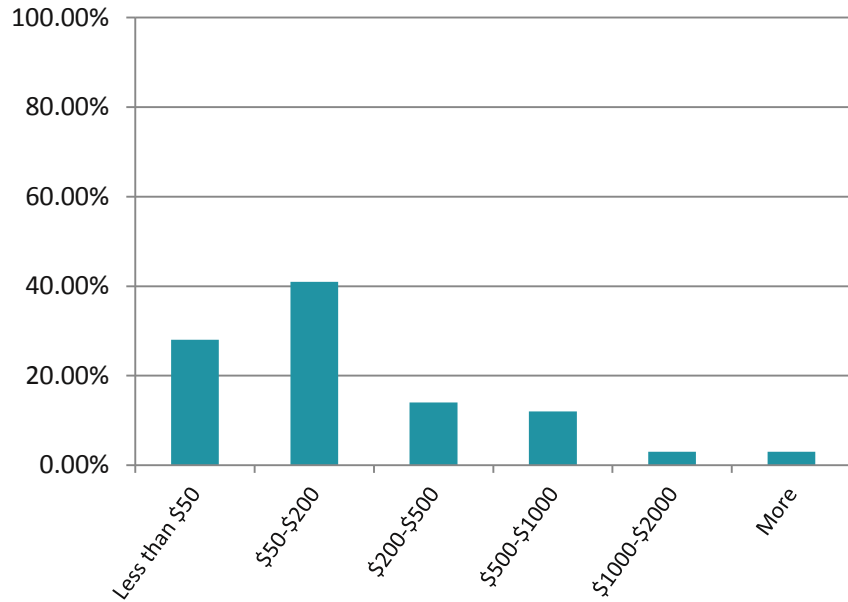
- It is clear that throughout all metrics, there is an underperformance, mostly in regards to trust, and this is a major factor holding back consumers from shopping online.
- Security and Trust are the major pain points and obstacles for users to shop online, as are they the most in which companies are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

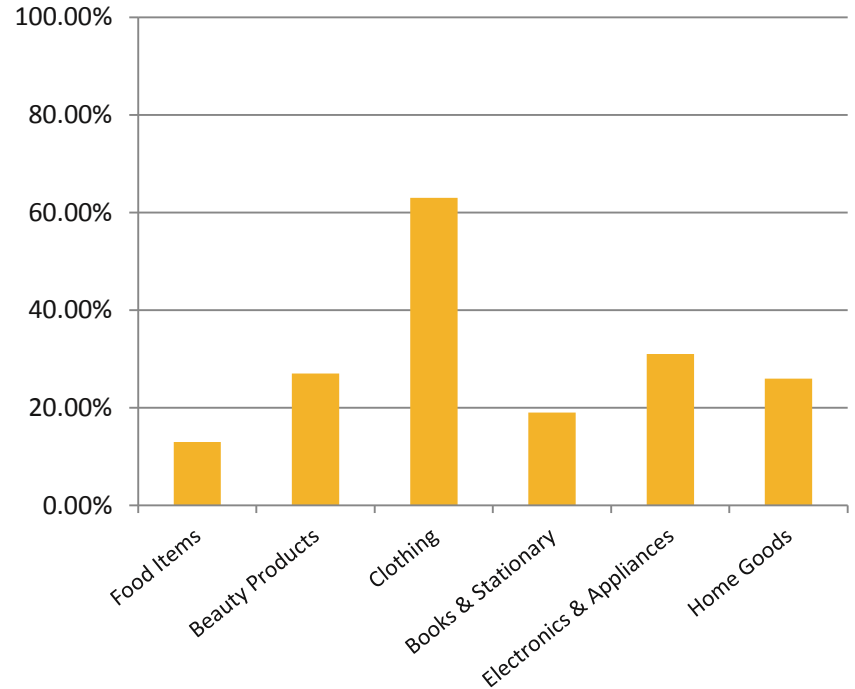
Purchasing Behavior

Spending*



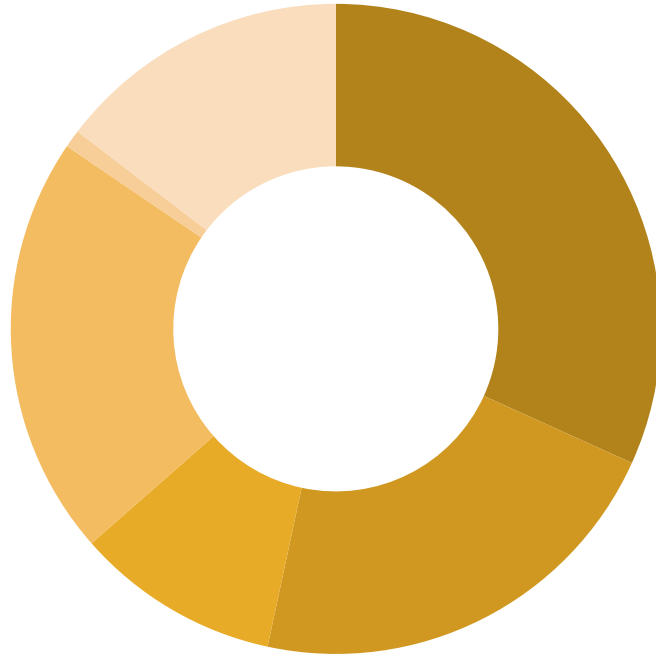
*YEARLY SPENDING

Nature of Purchases



Purchasing Behavior

Source



■ Global Websites

■ Local Websites

■ Brand Websites

■ Social Media

■ Phone Calls

■ Mobile Applications

79.7%

*Shop using their
smartphone*

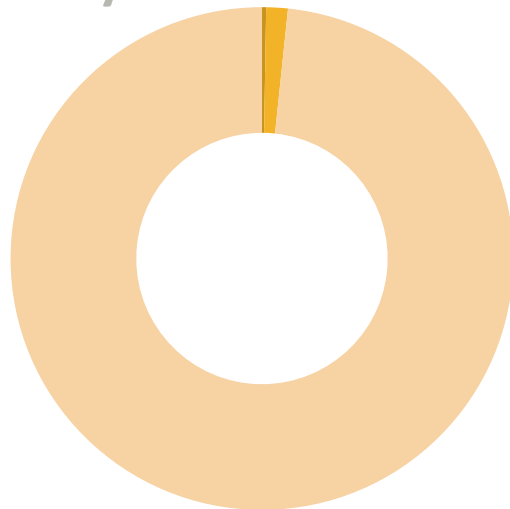
10.2%

*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%

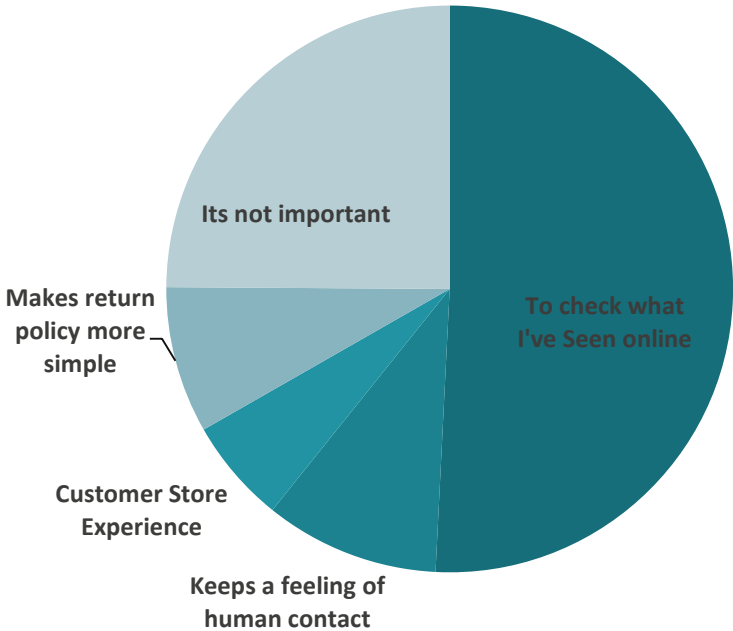
*Don't trust local
E-platforms and stores*

38%

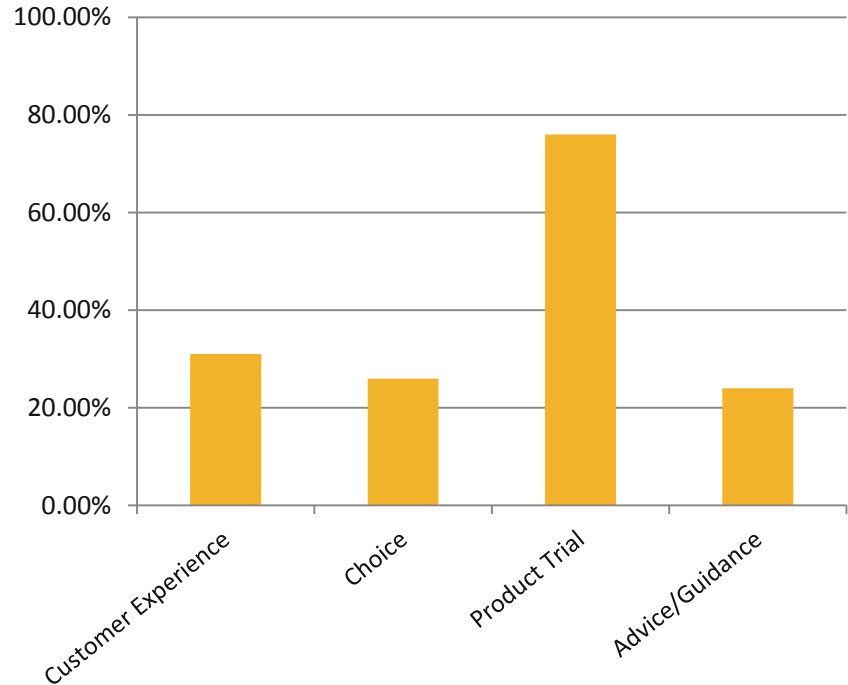
*Don't trust local
online payment*

Physical Stores

Importance of Physical Store



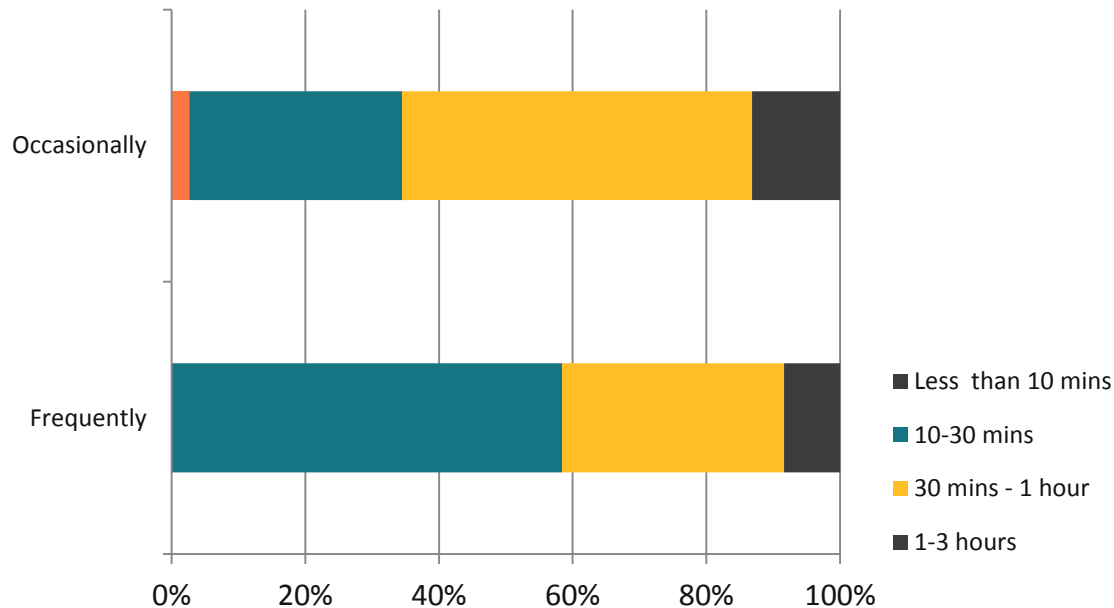
Reasons for Choosing Physical Stores over Online



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.



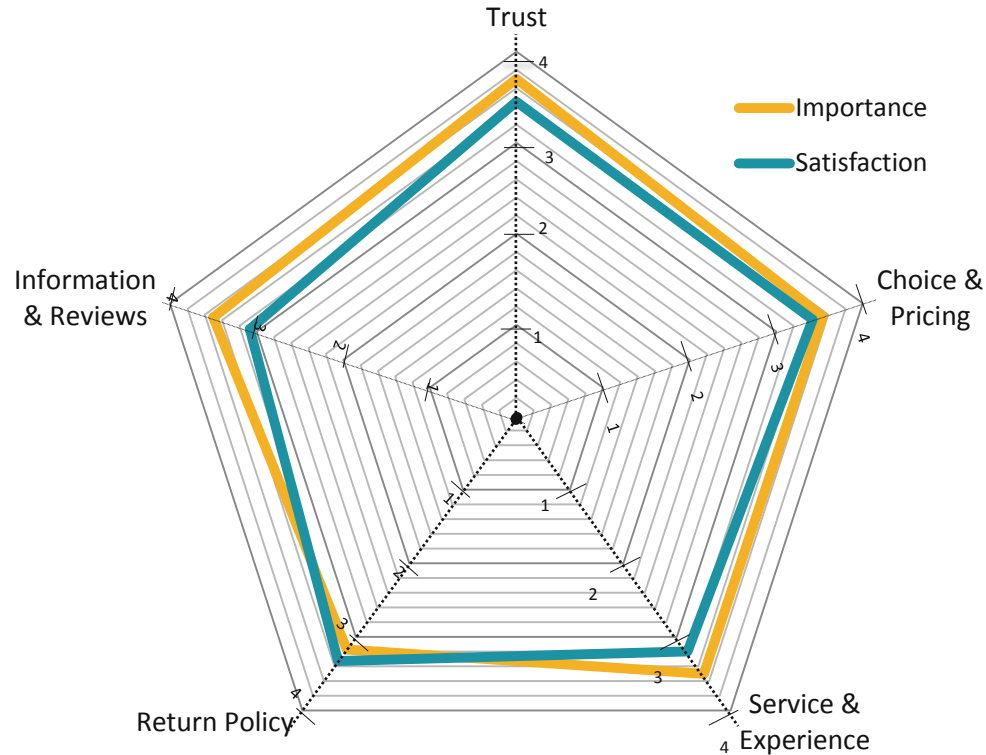
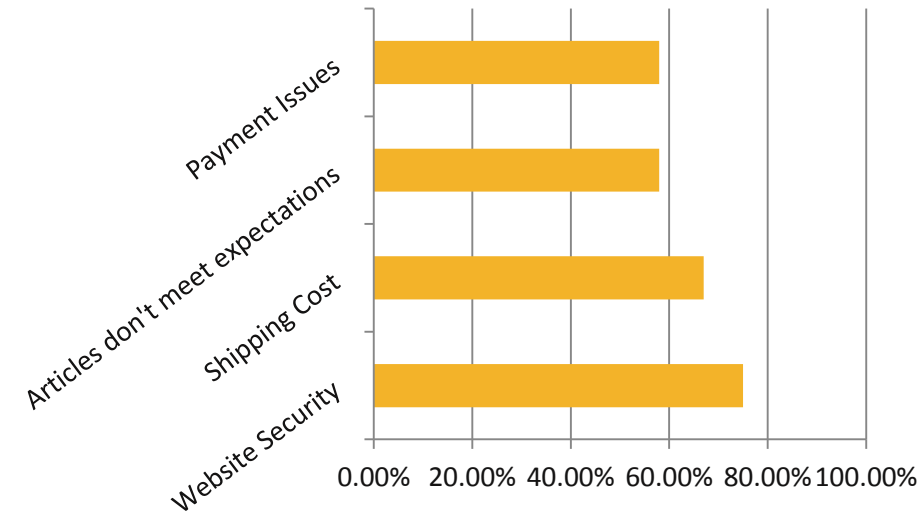
Who is the Frequent Shopper?

Age:

26-30– 41.7%

40+ - 25%

Online Shopping Preventions



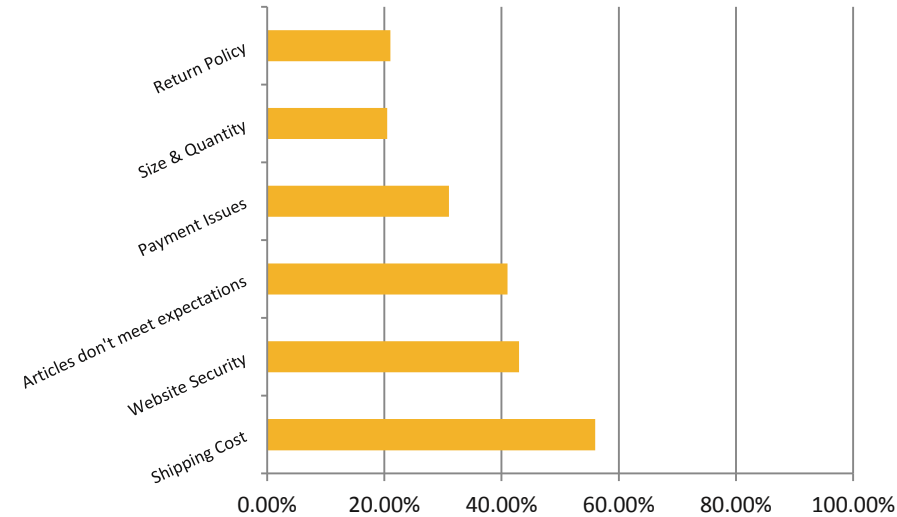
Who is the Occasional Shopper?

Age:

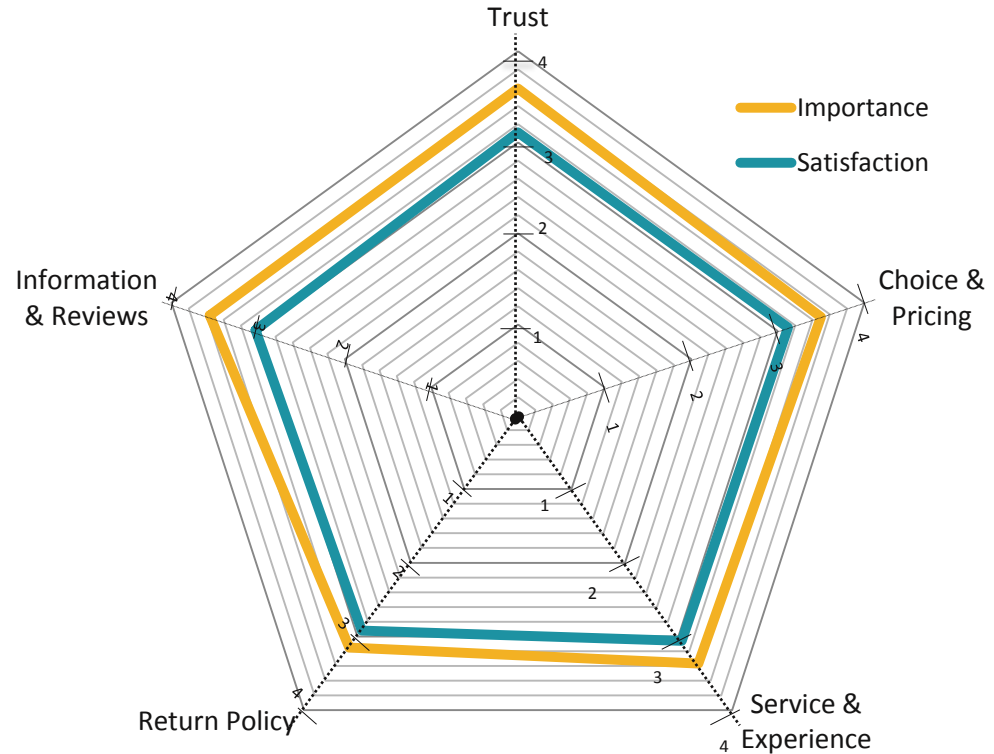
16-20 – 38.5%

21-25 - 23%

Online Shopping Preventions



Importance vs. Satisfaction



Who is the Non-Shopper?

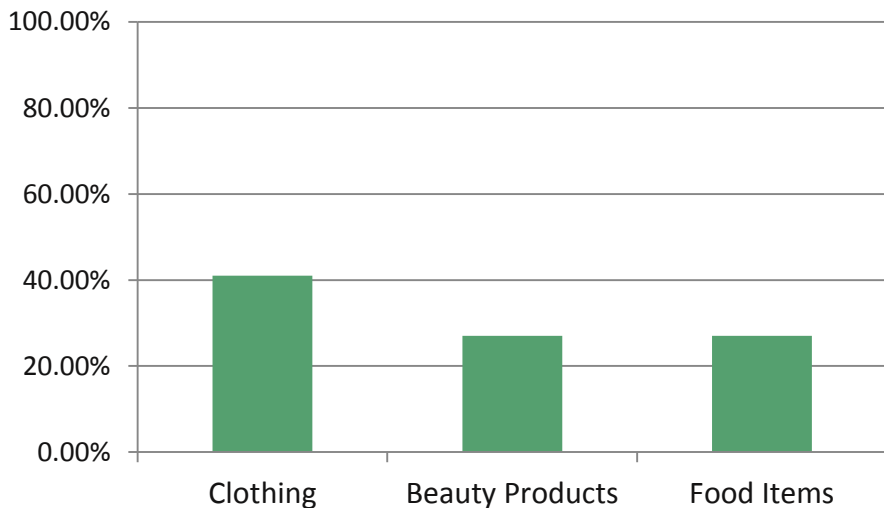
Age:

16-20 – 43.6%

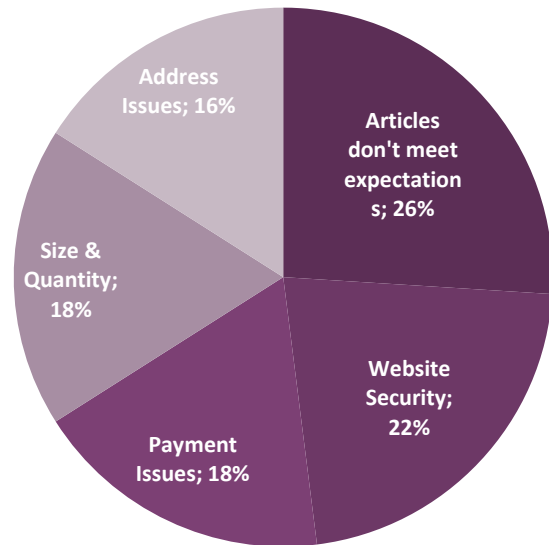
21-25 - 33.3%

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

When they do Shop



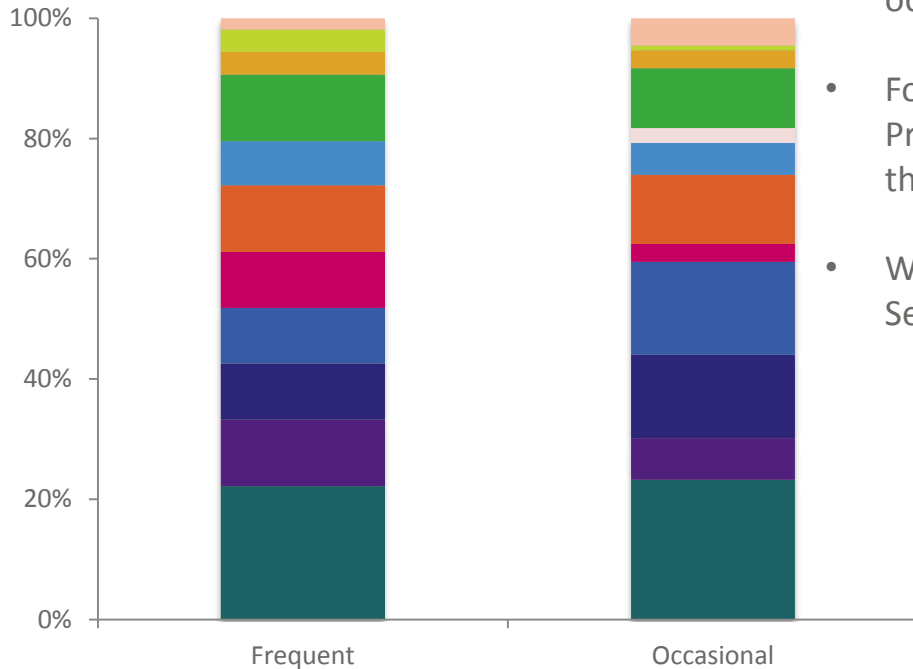
Online Shopping Preventions



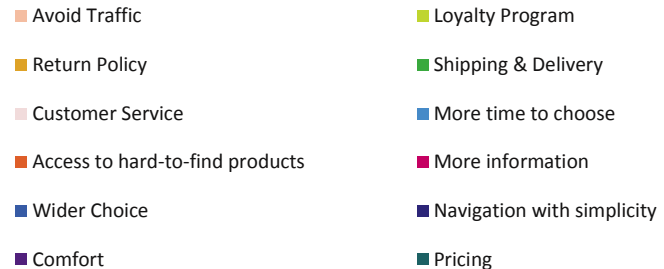
61% prefer to still go to physical stores because of Product trials.

E-Commerce shoppers motivations

Motivations to Shop Online

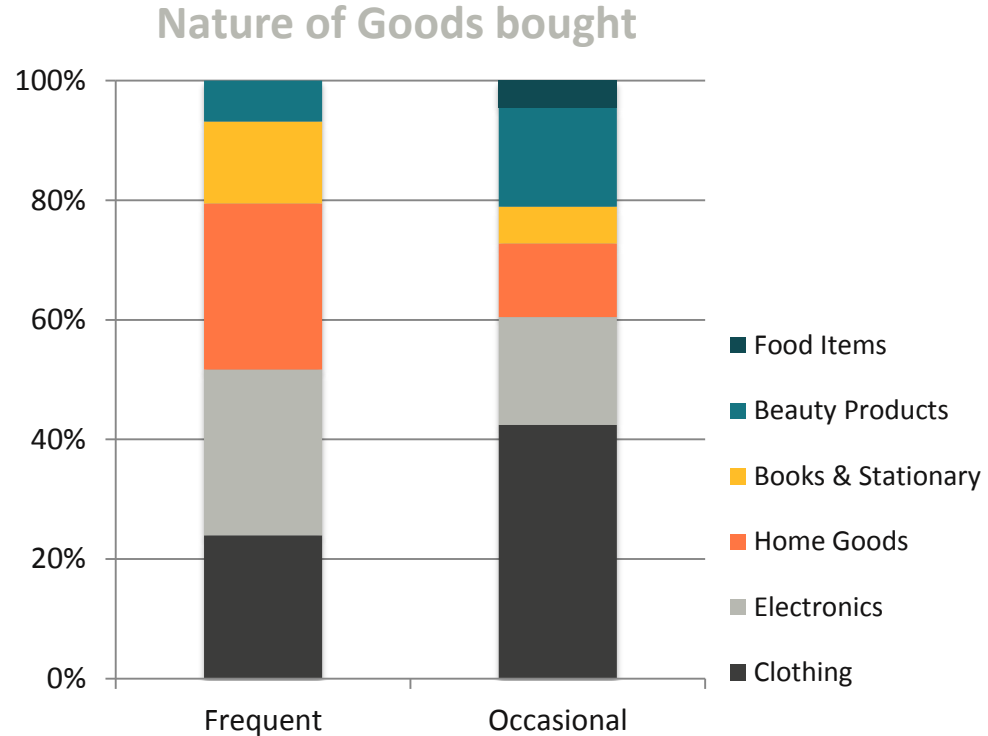


- Its evident that pricing is the main motivator for both occasional and frequent shoppers to go online.
- For the frequent shopper, Comfort, Information on Products and Loyalty Programs play a bigger role than they do for occasional shoppers.
- Whilst for the occasional; Wider choice, and Customer Service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

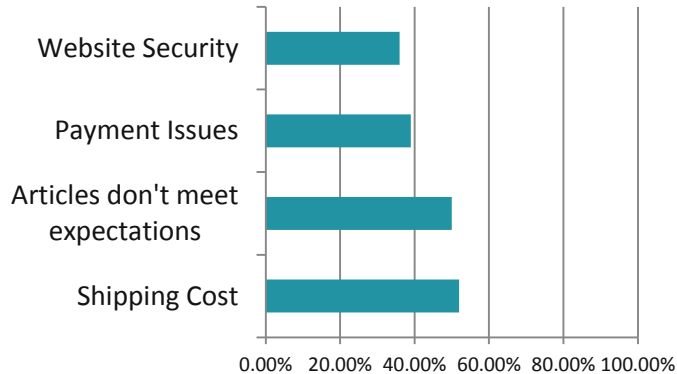
What they're also buying

- 32% → Electronics
- 30% → Home Goods

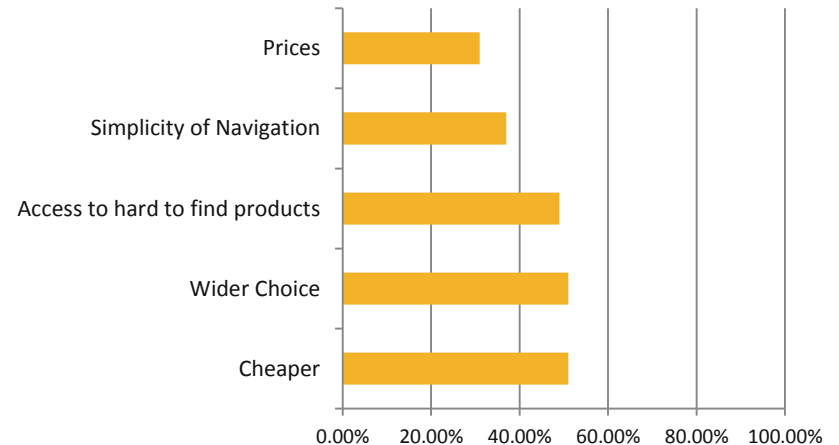
Source of dissatisfaction

- 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

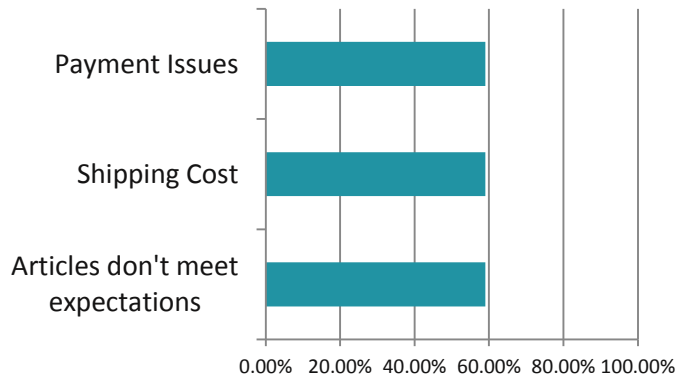
What they're also buying

- 64% → Clothing
- 36% → Home Goods

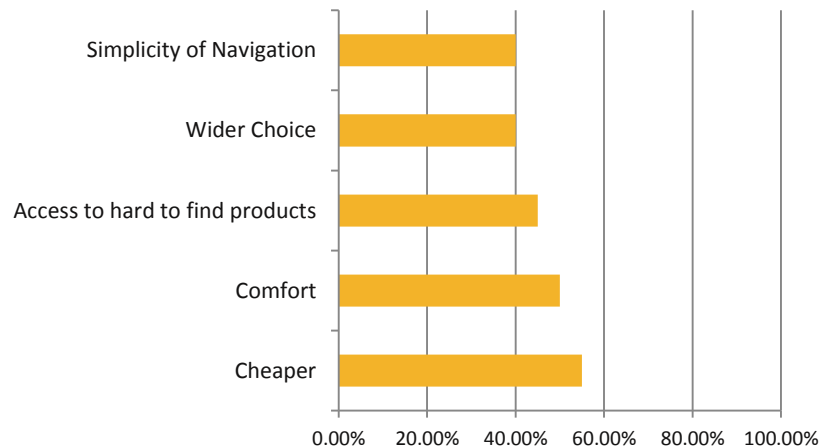
Source of dissatisfaction

- 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

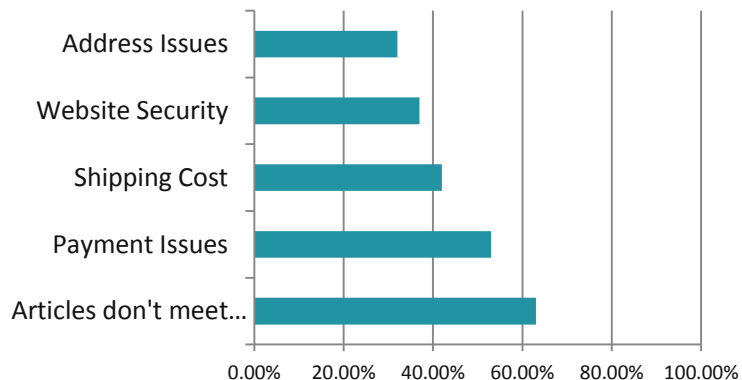
What they're also buying

- 58% → Clothing
- 21% → Electronics

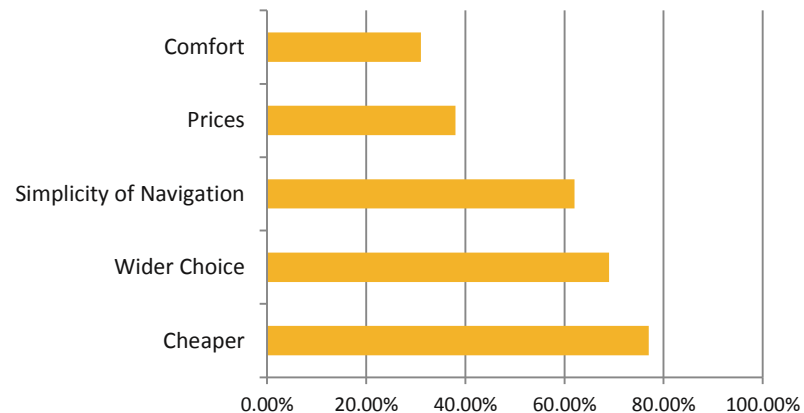
Source of dissatisfaction

- 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

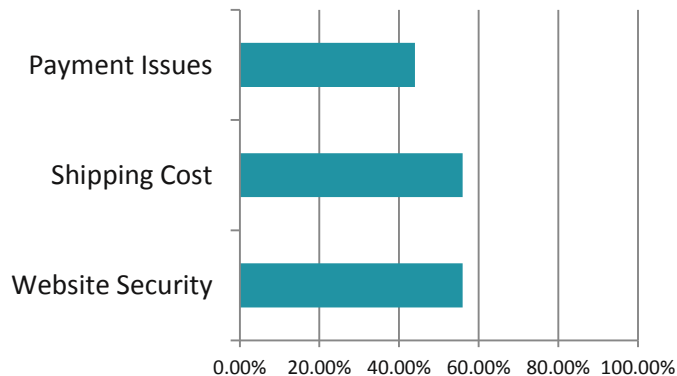
- 72% → Clothing
- 44% → Electronics

Source of dissatisfaction

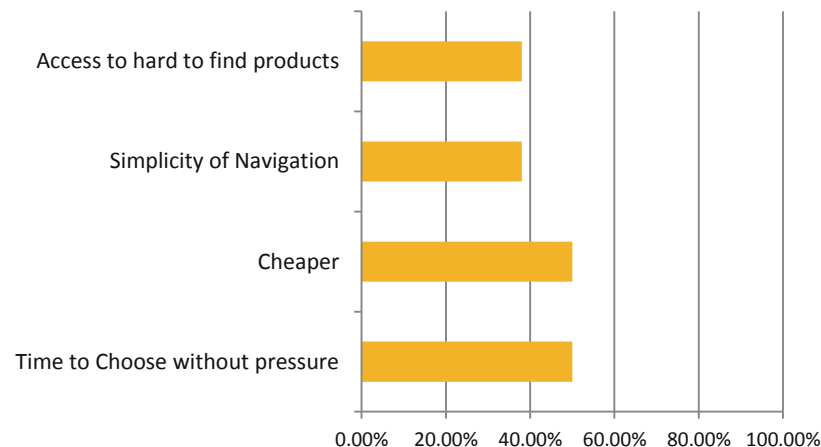
- Product information & Reviews
- Return Policy
- Reputation

- 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

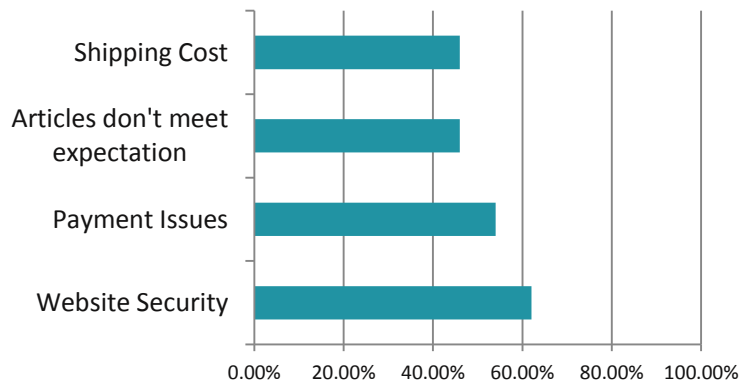
What they're also buying

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

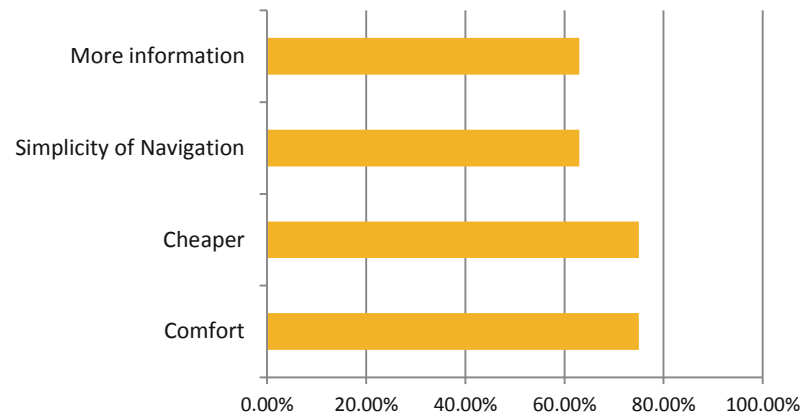
Source of dissatisfaction

- 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

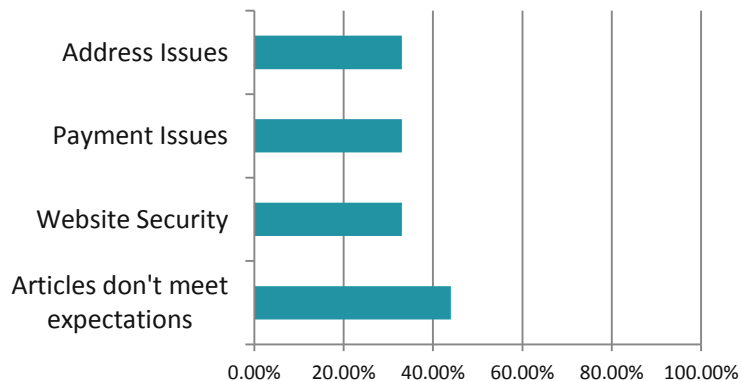
What they're also buying

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

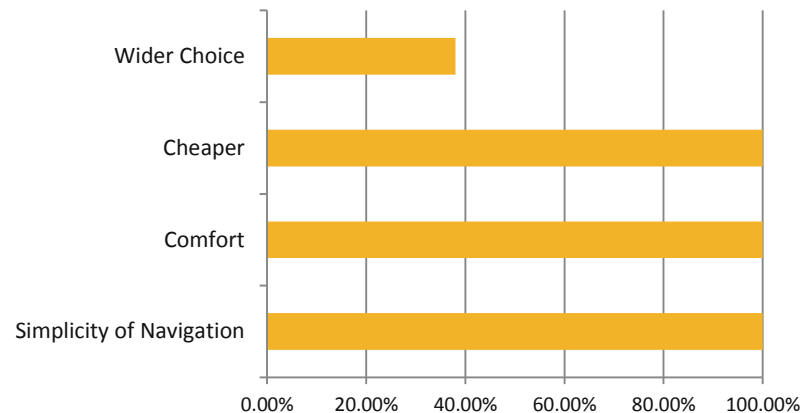
Source of dissatisfaction

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

Main Shopping Obstacles



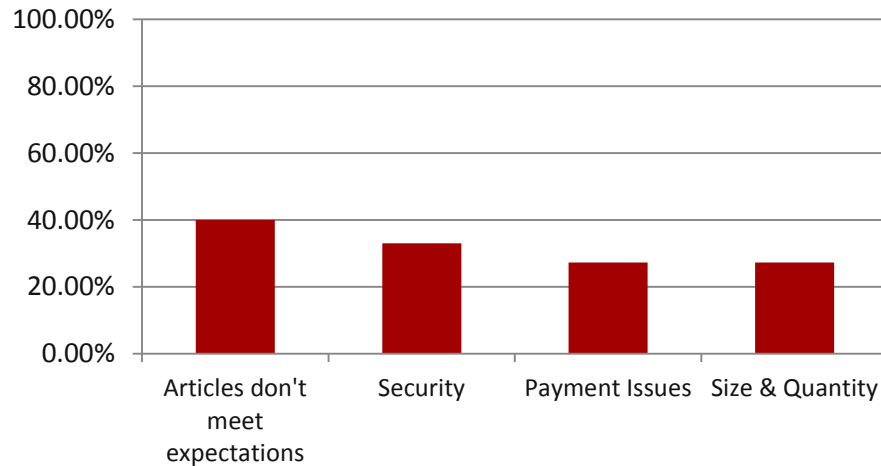
Motivation to Shop



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



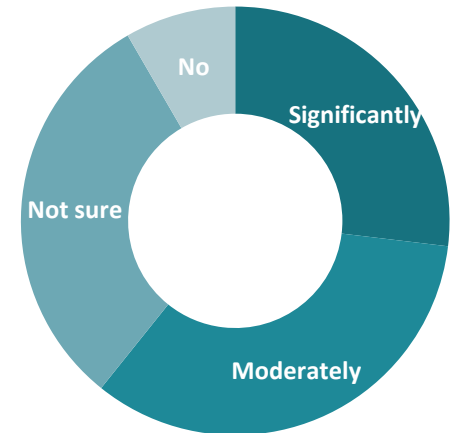
Clearly non-shoppers mainly avoid e-commerce for security issues which is linked to payment as well as trying and feeling the clothes. Not surprisingly 74% don't trust online payments and 82% prefer to pay through cash on delivery. Concerning security issues, only 14% don't mind sharing data for better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