MARKET MAPPING / JUNE 2026

Who owns the Dutch electronics market?

A Behavio Market Mapping study of the Dutch electronics category.

> MediaMarkt owns the mind. bol owns the wallet. Amazon.nl owns neither. The gap between what shoppers picture and what they buy is the most useful thing in this data.

BEHAVIO LABS
BEHAVIOLABS.COM

JIRI BOUDAL
BRAND EXPERT · BEHAVIO CEO

01 · OVERVIEW

Executive summary

Six brands compete for the same Dutch electronics shoppers: bol, MediaMarkt, Coolblue, Amazon.nl, Expert, and Megekko. In buyers' heads, they occupy very different spaces. Behavio mapped the category from the consumer's side, and two insights came back.

KEY INSIGHTS

A brand's origin still decides what it owns.

Years after everyone went omnichannel, the brands born online own price, choice, and convenience. The brands born in stores own advice, service, and the big, considered purchases. Heritage did not fade when everyone got a website; quite the opposite.

The top-of-mind brand is not the brand people buy.

MediaMarkt is top of mind for electronics. bol is where the money goes. Amazon.nl is known by almost everyone and chosen by almost no one. That gap, between the mind and the wallet, is the most useful thing in this data.

Across twenty buyer needs, four findings emerged. The defining variable was never the current channel but **heritage**, and **what each brand's history earned it the right to own**.

This paper covers the headlines. Explore the full interactive results, every need and every brand, in the **live Behavio report**.

02 · HOW WE MAPPED IT

Methodology

Behavio's Market Mapping shows a category through the eyes of its buyers. It measures the fast, intuitive memory links between brands and needs, the associations that actually drive choice.

STUDY AT A GLANCE

MARKET	Netherlands, electronics category. Fielded June 2026.
WHO	648 category buyers (people who buy electronics at least once a year), drawn from a representative national sample of 1,500 Dutch adults, balanced by age, gender, geography, and socio-economic status.
BRANDS	bol. · MediaMarkt · coolblue · amazon.nl · expert · MEGEKKO
MEASURED	Need importance (how many buyers each need drives), brand link (how strongly each brand is tied to each need), the Differentiation View (the same links adjusted for brand size), and brand health (awareness, salience, buyers, likeability).

THE DIFFERENTIATION VIEW, EXPLAINED

Differentiation View tables pose a straightforward question about the connections between an association and a specific brand: *is this association strong for a brand of this size, or is it performing worse than expected?*

The Differentiation View levels the playing field by showing where smaller brands punch above their weight, and where big ones are losing their edge.

03 · THE FINDINGS

The market splits by heritage

Not online versus offline (almost everyone sells both ways now), but by where a brand was *born*.

BORN ONLINE

bol.
amazon.nl
MEGEKKO

Marketplace-native brands. They own **price, choice, and convenience**.

BORN IN STORES

MediaMarkt
expert

Store-native brands. They own **advice, service, and the big purchases**.

coolblue ONLINE → STORE

The exception. Coolblue was born online but deliberately built stores, installers and service to operate as a **store brand**, proof that heritage doesn't have to be a sentence.

FIG. 1 The market splits by where each brand was *born*.

To read the market clearly, we grouped the twenty buyer needs into **four categories:**

1. price & quality
2. convenience
3. advice & service
4. purchase size

Each produced a distinct finding, laid out over the next pages.

01

FINDING 01 · PRICE & QUALITY

Price skews to the marketplaces, quality to the stores.

THE NEEDS BUYERS CARE ABOUT MOST

87%	88%	82%	81%
Good value	Affordable price	High-quality products	Discounts

Read through the **Differentiation View**, price and quality separate cleanly. **Amazon** over-indexes hardest on affordable price (+11); **Expert** is the clear differentiator on high-quality products (+6). Discounts skew to Amazon (+6) and **bol** (+4), away from Expert (−7).

And on **good value**, the single most important need in the market, every brand sits within ±2 of expected. No one differentiates. **The need everyone wants is the need nobody owns.**

NEED	IMP.	bol.	MediaMarkt	coolblue	amazon.nl	expert	MEGEKKO
Good value for money	87%	+2	-6	-1	+2	+2	0
Affordable price	88%	+3	-5	-4	+11	-4	0
High-quality products	82%	-4	-1	+1	-4	+6	+1
Attractive discounts	81%	+4	0	-3	+6	-7	-1

OVER-INDEXES UNDER-INDEXES

Imp. = need importance (share of buyers)
size-adjusted, 0 = as expected for brand size

FIG. 2 Price & quality needs, Differentiation View: how far each brand sits above or below what its size predicts.

KEY INSIGHT

"Cheap" is an online trait, "good" is a store trait, and "value" is still up for grabs.

02

FINDING 02 · CONVENIENCE

Convenience is online territory, full stop.

CONVENIENCE NEEDS

80%	74%	69%	69%
Wide selection	Makes my life easier	Easy to buy online	Getting products quickly

In the **Differentiation View**, **Amazon** over-indexes hardest on wide selection (+12) and easy to buy online (+11); **bol** punches above its weight on makes my life easier (+8) and getting products quickly (+7). **MediaMarkt** and **Expert** run negative on *every* convenience need; this is marketplace ground.

NEED	IMP.	bol.	MediaMarkt	cool blue	amazon.nl	expert	MEGEKKO
Wide selection	80%	0	-2	-6	+12	-4	+1
Makes my life easier	74%	+8	-3	-4	+3	-2	-1
Easy to buy online	69%	+4	-8	+2	+11	-10	+1
Getting products quickly	69%	+7	-7	-1	+6	-5	+1

OVER-INDEXES UNDER-INDEXES

Imp. = need importance (share of buyers)
size-adjusted, 0 = as expected for brand size

FIG. 3 Convenience needs, Differentiation View: Amazon and bol over-index; the store brands run negative on all four.

KEY INSIGHT

Speed, choice, and ease belong to the brands born to deliver them. This is the one area store heritage cannot cheaply buy back.

03

FINDING 03 · ADVICE & SERVICE

For advice and installation, shoppers still want a store.

SERVICE NEEDS

74%	68%	68%	51%
Easy to buy in-store	Easy returns	Expert advice	Installation services

The **Differentiation View** gaps here are the widest in the study. On expert advice, **Expert** (+16) and **Coolblue** (+12) tower above expectation while **bol** (−19) and **Amazon** (−14) collapse; installation repeats it (Expert +17, Coolblue +13, versus −17 for both marketplaces). Even easy to buy in-store swings to **MediaMarkt** (+13) and Expert (+12).

The one exception is **easy returns**, where **bol** is the only brand that over-indexes (+8). For a pure online player, returns is a logistics problem, not a service counter: solved with process, not people.

NEED	IMP.	bol.	MediaMarkt	cool blue	amazon.nl	expert	MEGEKKO
Easy to buy in-store	74%	-12	+13	-4	-8	+12	-2
Easy returns	68%	+8	-5	0	-2	-1	-1
Expert advice	68%	-19	+5	+12	-14	+16	+1
Installation services	51%	-17	+5	+13	-17	+17	0

OVER-INDEXES UNDER-INDEXES

Imp. = need importance (share of buyers)
size-adjusted, 0 = as expected for brand size

FIG. 4 Advice & service needs, Differentiation View: Expert and Coolblue punch above their weight; the marketplaces collapse.

KEY INSIGHT

The more a need depends on a human helping you, the more it belongs to the brands that grew up with humans in stores.

04

FINDING 04 · PURCHASE SIZE

The bigger the purchase, the more the store wins.

"GREAT FOR BUYING..."

68%	70%	53%	41%
A computer	A mobile phone	Small accessories	Gift shopping

The **Differentiation View** splits them by how much the decision matters. Considered, expensive buys over-index to the stores: **MediaMarkt** punches above its weight on mobile phones (+11) and computers (+8), with **Coolblue** positive on both. Quick, low-stakes buys over-index online: **bol** leads gift shopping (+12) and accessories (+6), with **Amazon** strongly positive on both (+9). Tellingly, store-shaped Coolblue goes *negative* on exactly these throwaway buys (−9, −11).

NEED	IMP.	bol.	MediaMarkt	coolblue	amazon.nl	expert	MEGEKKO
Great for buying a computer	68%	-5	+8	+5	-9	0	+2
Great for buying a mobile phone	70%	-2	+11	+1	-4	-6	0
Great for small accessories	53%	+6	-1	-11	+9	-4	+1
Great for gift shopping	41%	+12	-3	-9	+9	-8	-2

OVER-INDEXES UNDER-INDEXES

Imp. = need importance (share of buyers)
size-adjusted, 0 = as expected for brand size

FIG. 5 Purchase-type needs, Differentiation View: considered buys over-index to the stores; quick buys to the marketplaces.

KEY INSIGHT

Marketplaces win the small stuff. Stores win what people are afraid to get wrong.

04 · THE MARQUEE FINDING

The mind and the wallet belong to different brands

Each of these three brands ended up somewhere different. MediaMarkt is the store shoppers picture and turn to for the big buys. bol is the one they actually use and trust. Amazon.nl, for all its reach, leads on nothing.

MediaMarkt

OWNS THE MIND

74% SALIENCE **97%** AWARENESS

Highest electronics salience by far, versus bol's 45%. Shoppers **picture the store**, and it owns the considered purchases.

bol.

OWNS THE WALLET & HEART

71% BUYERS **85%** LIKEABILITY

Most buyers and the warmest feeling in the market, but mid salience (45%). **Used and liked, not pictured first.**

amazon.nl

OWNS NEITHER

88% AWARENESS **14%** SALIENCE

Bought from by 37%, leading none of the twenty needs. **Awareness was never the problem. Getting picked is.**

Why the split? MediaMarkt's store heritage makes it the brand shoppers *picture* for electronics, but most purchases are quick and price-led, so the click goes to bol. The pictured store only wins the transaction when the basket is big enough to be worth the trip. **Salience sets the shortlist; convenience closes the sale.**

Market data agrees: the Netherlands is one of only two Western European countries where Amazon is not the leader. It still trails bol on sales, roughly **€1 billion to bol's €3.1 billion** in 2024, despite committing over €1.4 billion to the market through 2027.

cool blue

Coolblue proves heritage is a strong influence, but doesn't have to be a fixed fate. It started online, but by opening stores, adding its own installers, and building a service reputation, it now owns store-type strengths: installation (+13% size-adjusted) and expert advice (+12%), with solid likeability (68%).

Only one brand converts fame into category recall

Line up awareness against salience and the pattern is stark. Only **MediaMarkt** converts fame into electronics recall (97% aware, 74% salient). The generalists leak it: **bol by 53 points, Amazon by 74**. The specialist gets remembered for electronics; the generalists get remembered for everything, which means for nothing in particular.

BRAND	AWARENESS know the brand	SALIENCE picture it first	BUYERS buy from it	LIKEABILITY feel good about it
bol.	98%	45%	71%	85%
MediaMarkt	97%	74%	63%	77%
coolblue	92%	44%	44%	68%
amazon.nl	88%	14%	37%	53%
expert	71%	8%	18%	37%
MEGEKKO	19%	1%	7%	12%

FIG. 6 Brand-health scorecard: awareness, salience, buyers and likeability. Only **MediaMarkt** carries its awareness through to salience; the generalists leak it.

KEY INSIGHT

Being pictured is not the same as being bought. In a market built on search and convenience, distribution beats memory, right up until the purchase gets big enough to send the shopper back to a store.

05 · WHAT IT MEANS

What it means

The same map reads differently depending on where your brand was born. The move is never to chase every need; it is to own the one your history already earned you.

STORE-BORN

MediaMarkt · Expert

Your edge is advice, service, and the purchases people fear getting wrong. A marketplace cannot copy that with a faster warehouse. **Defend it: don't burn budget out-pricing bol on cables.**

ONLINE-BORN

bol · Amazon · Megekko

You win the wallet, not the category mind. Closing the salience gap (being pictured, not just used) is the growth lever. **Megekko owns no distinctive need at all. Pick one.**

A SPECIAL CASE

Amazon.nl

Awareness is solved; money has not moved recall or purchase. Its real position is **price, choice, and gifting**. Own that loudly instead of spreading thin.

> "The mistake is chasing every need at once. Find the need your brand already *half-owns*, the one your history earned you, and own it completely. That is where growth is cheapest and stickiest."
>
> JIRI BOUDAL · BRAND EXPERT & BEHAVIO CEO

Want the full picture? Every need, brand, and Differentiation View is in the [live Behavio report](#).

06 · ABOUT

About Behavio

Behavio is a research technology company built on a simple truth: **what people say is not what they do.** It makes advanced behavioral methods scalable for cross-border consumer brands, helping them track brand performance, map markets, and test ads in one dashboard – with results that tell them what to do next, not just what happened.

Since 2015, its tools have been trusted by over **600 brands across 40+ markets**, including some of the EU's fastest-growing: Notino, GymBeam, and Decathlon. Backed by **Airbridge Equity Partners** and named to the **Deloitte Fast 50** twice.

PRESS CONTACT

For interviews, additional commentary, or access to the full dataset, please contact:

Jiri Boudal
Brand Expert & CEO, Behavio

jiri.boudal@behaviolabs.com

