

E-commerce 2011: trends and attitudes

Research into Romanian internet users

Complimentary report, June 2011



About the study

The report hereby shows selected results of the **2011 e-commerce study** conducted in Romania, for **Romanian Allegro Group**, by **IIBR|Gemius Group** in partnership with **Rol.ro, Ejobs, Digital4** and **Internet Corp**. The study is a part of a research project concerning several European countries: Czech Republic, Romania, Slovakia, Ukraine and Poland.

Objectives

The main aim of the research was to identify the attitudes and usage preferences of Romanian internet users regarding online shopping behaviour in e-shops and on e-auctions.

Content

The short version of the report shows chosen results in the form of charts and presents key findings in a descriptive form.



Countries where e-commerce study was conducted in 2010/2011 are coloured in dark grey; the country of this study is marked in red.

Full report

The full version of the report discusses:

- General attitudes towards online shopping
- Frequency of shopping on the internet
- Ranking of e-shop websites in Slovakia
- Attitude towards and usage of e-shops
- Ranking of e-auction websites in Slovakia
- Attitudes towards and usage of e-auctions

It is possible to purchase full reports for: Czech Republic, Slovakia, Ukraine, Poland.



General attitudes towards shopping

What do you care about most while shopping (apart from everyday shopping for food)?



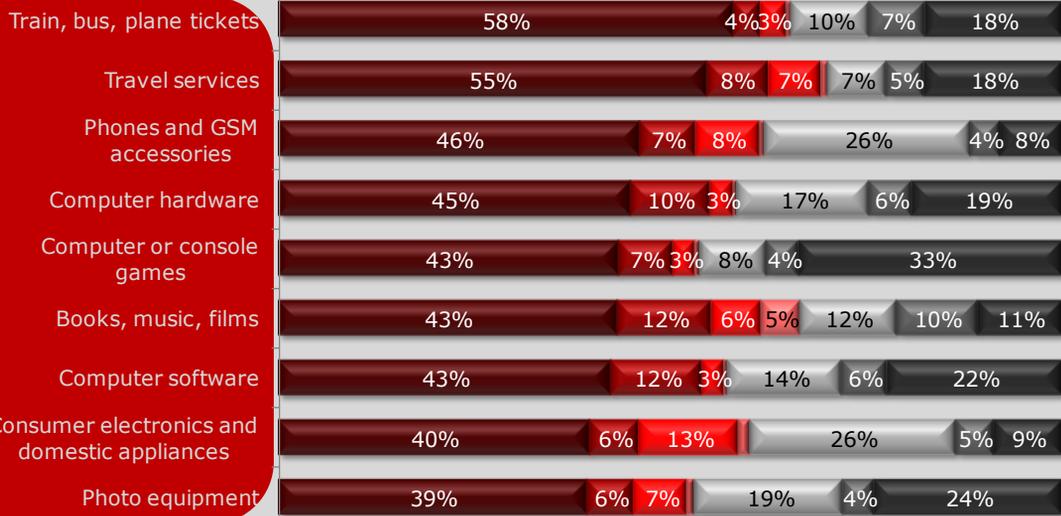
N= 1,500 – all respondents

Romanian internet users present a rather positive attitude towards shopping – approximately 2/3 state that they love or like shopping. This tendency is much more visible among women as ¾ of female respondents express positive attitude compared to ½ of men. While shopping, Romanian internet users focus equally on buying products of the best quality as well as on saving money. For women, however, spending time in a pleasant way is a more important aspect of shopping, than reduction of expenses.

The internet is a frequently-used source of information about planned purchases. With regard to such categories of products as:

‘train, bus, plane tickets’ and ‘travel services’ more than 50% of internet users declared that they check information online before shopping. Excluding the internet, many respondents want to get information about products from personal contacts: shop assistants or friends and relatives.

Having decided to go shopping, from where do you most often get information about a given product?



For transparency of the data presentation, values below 3% were hidden on the chart.

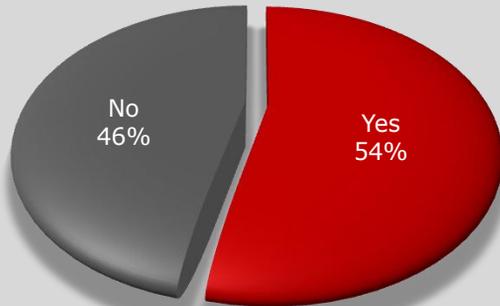
- From the internet
- From friends and family
- From advertisements
- From the press
- From shop assistants
- From other sources
- I don't look for information or I don't buy such products

N= 1,500 – all respondents



General attitudes towards online shopping

Have you ever shopped on the internet?



N= 1,500 – all respondents

In case of 'consumer electronics and domestic appliances' readily used source of information are also advertisements.

Awareness of online shopping among Romanian internet users could not go higher – more than 99,8% of respondents declare they have heard of the possibility of purchasing products via the internet. Taking into account high level of awareness, the penetration of personal experience with shopping online among Romanian internet users is at a medium level. Hardly 54% of them declare they have shopped online at least once and among women the share of e-shoppers is even lower.

Nearly 2/3 of online shoppers bought something online within the month prior the study. Approximately half of Romanian internet users who purchased something online in the last month stated they spent up to 400 RON during that period.

Perception of e-shopping indicates that many Romanian internet users have doubts concerning its security. More than 2/5 of respondents (in case of women – almost 50%) believe that online shopping is risky – that was the attribute chosen the most often when asking about characteristics of e-buying. On the other hand nearly the same share of Romanian internet users think e-buying is less time consuming and 1/3 – that it is cheaper than buying in traditional stores what creates a more positive image of online shopping.

The main group of Romanian online customers can be classified as those who shop on the internet several times a year. Approx. one in five respondents shopped online only once.

Price comparison engines seem to be quite popular in terms of awareness (over 70%) but not so widely used (approx. 1/3 of online shoppers declare they have used such a service before). The most popular price comparison engine in Romania is ShopMania.ro.

Based on your own experiences or other people's opinions, do you think that buying on the internet...:



N= 1,489 - respondents who have heard of the possibility of online shopping



Online stores vs. online auctions

E-shops are far more popular than other e-commerce services (e-auctions, classifieds websites or social shopping websites) – while over two in three Romanian online buyers have shopped in e-stores, only a bit more than one in four has used classifieds websites which took second place in popularity ranking.

	ONLINE STORES	ONLINE AUCTIONS
Reasons for purchasing online	Home delivery (52%)	Lower prices compared to traditional shops (60%)
Encountered problems	Long product delivery time (17%)	False information on the website (20%) Dissatisfaction with the received products (20%)
The most popular products	Consumer electronics and domestic appliances (40%)	Phones and GSM accessories (48%)

For each category, the most often indicated answer is presented

Research method

The research was conducted with the use of the CAWI method (computer-assisted web interviewing). Respondents were invited to take part in the study with the use of pop-up or overlay questionnaires displayed randomly to internet users visiting selected Romanian websites, asking them to complete the online questionnaire. The selection criteria of the websites where the survey recruitment took place referred to total reach and the socio-demographic profile of website users, as well as their content (unrelated to the studied topic directly).

In order to ensure that the collected data is representative for the entire online population in Romania, the internet user answers were analysed with the use of an analytical weight, based on data related to the structure of the online population in terms of gender, age and frequency of internet usage. All research findings expressed as a percentage on the charts refer to weighted data, whereas the sample size (N) presented on the slides refers to unweighted data and shows the number of respondents who have answered a particular question.

The data was collected in the period from the 20th and 25th of May 2011. The final sample consisted of 1,500 questionnaires completed by Romanian internet users aged 15 and above. The structural data was taken from Mercury, November 2010.



Contact

GEMIUS RESEARCH SRL
Str. Cezar Bolliac, Nr. 8, Ap 6
Sector 3, 030912, Bucuresti
Mobile: (+407) 45202328
www.gemius.com



IIBR sp. z o. o. / Gemius Group
7 Wołoska Street, Mars, Entrance D
02-675 Warsaw, Poland
T +48 22 378 30 53
www.iibr.pl



Contact persons:

Romania: Catalin Emilian (catalin.emilian@gemius.com)

Poland: Judyta Gulatowska (judyta.gulatowska@iibr.pl)

Krzysztof Łopuszyński (krzysztof.lopuszynski@gemius.pl)

About the company

Gemius SA is the largest online research agency in Central and Eastern Europe. The company has been dedicated to internet market research since its founding in 1999. By focusing the business on maximizing credibility, quality and accuracy the company has been able to grow into the largest online market research agency in Central and Eastern Europe in less than 5 years. Currently Gemius is focusing on developing our activities in Turkey and in the Middle East.

Gemius provides data on internet users' behaviour (gemiusTraffic), internet audience profiles (gemiusProfile), or online advertising campaign effectiveness (gemiusEffect). Gemius' gemiusAudience research is the online advertising currency across Europe, where by working with key joint-industry committees and other market players Gemius provides accurate, high-quality measurement of online audiences for media planners, buyers and sellers.

Interaktywny Instytut Badań Rynkowych Sp. z o.o. (IIBR) since 2004 is a dedicated Market Research branch of Gemius International Group, specialising in combining both direct response (measured with site-centric approach) and more classical marketing indicators (collected with the use of on-line questionnaires).

We focus on high-quality, ethical research. We adhere strictly to the codes of conduct developed by ESOMAR.

