

# E-commerce 2009: trends and attitudes

Research into Hungarian internet users

Complimentary report



## About the study

This report hereby shows selected results of the **2009 e-commerce study** conducted in Hungary by Gemius in partnership with **Inda.hu, Index.hu, Velvet Network, Totalcar.hu and Portfolio.hu**. The study is a part of a research project concerning several countries from Central and Eastern Europe.

## Objectives

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

In Hungary, two study-related surveys were conducted: the first took place in 2007, the other in 2009.

## Content

The short version of the report shows chosen 2009 results in the form of charts and presents key findings in a descriptive form.



### Countries included in the 2009 e-commerce study

Countries where the e-commerce 2009 study was conducted are shown in dark grey; the country covered by the report is marked in red.

## Full report

The full version of the report presents data gathered in surveys (both) conducted in 2007 and 2009 and discusses:

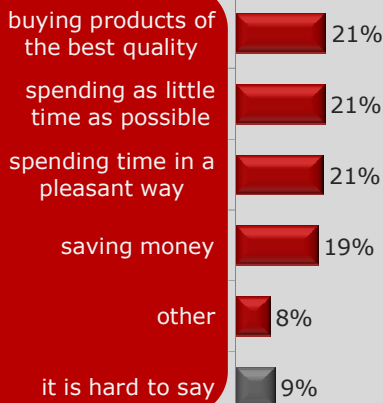
- General attitudes towards online shopping
- Frequency of shopping on the internet
- Ranking of e-shop websites in Hungary
- Attitude towards and usage of e-shops
- Ranking of e-auction websites in Hungary
- Attitudes towards and usage of e-auctions

In cases where the results were comparable, the statistical significance of particular differences between the years 2007 and 2009 was investigated.



## General attitudes towards shopping

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



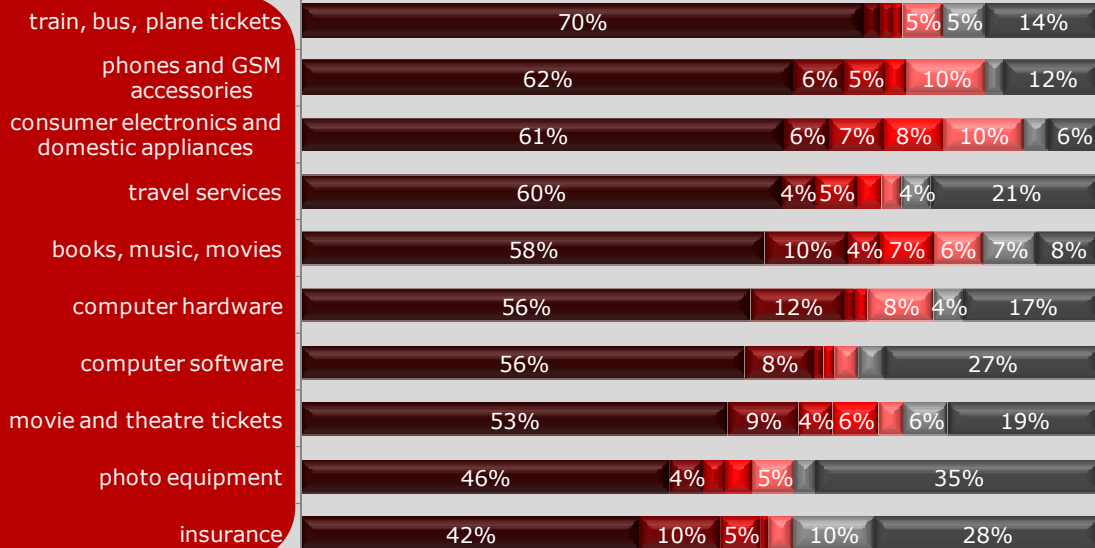
N= 1,485 – all respondents

Less than half of Hungarian internet users declared that they love or like shopping. The share of shopping enthusiasts has slightly decreased, compared to the 2007 results. When shopping, the main interest is very fragmented – all four aspects investigated (“getting the best quality”, “saving money”, “spending pleasant time” and “spending as little time as possible”) obtained a similar share of responses. Surprisingly, “saving money” decreased by 13 percentage points compared to the 2007 results, suggesting that the financial crisis has not made Hungarian internet users shop for cheaper products.

The internet is the main source of information for half of the tested products. This means that regardless of whether they buy online or not, Hungarian internet users

mainly go online to find out about such products as e.g.: travel tickets, tourism packages, and electronics. For the other products tested, respondents enquire chiefly offline – mainly from shop assistants, friends and family. This is the case with food, cosmetics, clothes and jewellery and other products, usually seen as more difficult to acquire online.

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 4% were hidden on the chart.

■ from the internet  
 ■ from friends and family  
 ■ from advertisements  
 ■ from the press  
 ■ from shop assistants  
 ■ from other sources  
 ■ I do not look for information or I do not buy such products

N= 1,485 – all respondents



## General attitudes towards online shopping

Almost all (99.7%) internet users know about the possibility of shopping online, which is a considerable increase compared to the 2007 results. The perception of online shopping as being

a faster way to shop is endorsed by almost half of the Hungarian internet users. Significantly more respondents than in 2007 (37% compared to 26%) think online shopping is cheaper, and one in three thinks it is risky. Only 9% of the Hungarian internet users think buying online is a complicated procedure. Two thirds have bought something online. Taking into account time when respondents undertook their first online transaction it seems that online shopping is advancing at the same pace as in the 2007 survey (similar percentages of new online shoppers and those who have one, two-year or longer experience in e-shopping were registered).

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



*N= 1,484 - respondents who have heard of the possibility of online shopping*

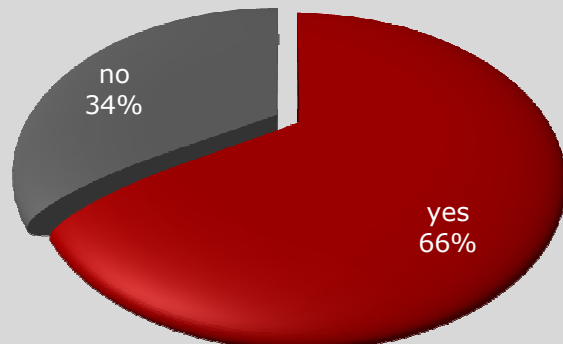
Analogous to 2007, the great majority of Hungarian online shoppers shops online from their home computers. Compared to 2007 levels, fewer respondents bought online at least once and simultaneously more declared that they shopped online rarely. However, the proportions of more frequent buyers are mainly unchanged, with most of the respondents (46%) buying online several times a year.

Price comparison engines are becoming more popular in Hungary as the awareness of such e-services has increased to more than 80%. The share of e-shoppers who

actually used them grew from 2007 by 22 percentage points totalling over 50% in 2009. The main players in terms of aided awareness are Arukereso.hu and Depo.hu. However, only 10% of Hungarian internet users begin searching online for products using a price comparison engine. More than two thirds begin their search using a search engine and 14% first look on the online stores they already know.

Two thirds of Hungarian online buyers bought something online within the month prior to the study. In that time, the greatest share of respondents (28%) spent between 7,000 and 20,000 forints online.

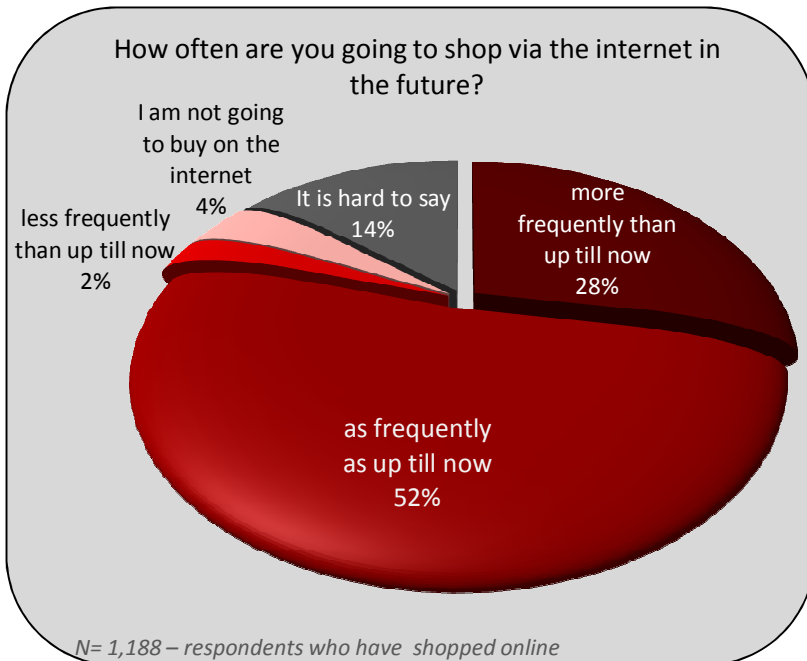
Have you ever shopped on the internet?



*N= 1,485 - all respondents*



## Predictions for the future



Hungarian e-commerce seems to have a growth potential for the forthcoming years. Almost three in ten Hungarian e-shoppers claim they will purchase online more frequently than they used to (significant increase compared to 2007). However, more than half will buy as frequently as up till now. The main triggers for increasing online shopping are finance-related. Lower costs, special offers, discounts and a better financial situation inclines internet users to buy more online. The rapid growth in the share of respondents

indicating a better personal financial situation as an incentive to buy online more often, may be caused by the economic crisis.

Approximately one third of Hungarian internet users never bought anything online. 46% of this group (compared to 53% in 2007 results) considered at some point the possibility of shopping on the internet. However, only one in ten non-buyers that had considered buying online actually tried to purchase something.

The perspectives for making non-buyers try online shopping are fair: 8% of non-buyers have decided to definitely buy something online in the future, and 31% said they will probably do so. Respondents who are open to online shopping are attracted to the possibility of buying online books, music, films, transportation tickets, cinema and theatre tickets.

### What would make you shop on the Internet more frequently?



*N= 1,188 – respondents who have shopped online*



## Online stores vs. online auctions

Invariably since 2007, online auctions remain less popular than e-shops, with 34% of e-customers declaring they have bought something on them comparing to 87% of respondents who declared they shopped in

online stores. However over the last two years, online stores have become less popular among Hungarian internet users (decrease of 5 percentage points) while the percentage of respondents who have ever been customers of online auctions have increased by 10 percentage points.

	ONLINE STORES	ONLINE AUCTIONS
Reasons for purchasing online	Saving time (52%)	Products that are more difficult to find elsewhere (63%)
Encountered problems	Long product delivery time (15%)	False information on the web site (17%)
The most popular payment method	Cash on delivery (70%)	Bank transfer (62%)

For each category, the most often indicated answer is presented

Base of percentages are, respectively: (1) respondents who have ever shopped in online stores and (2) respondents who have ever shopped on online auctions

**Bookline** (15%), **Extreme digital** (7%) and **Amazon** (6%) are the first names that come to peoples' minds when asked about online stores. Yet, almost half (47%) of Hungarian internet users could not name any online store. In the ranking of online shops that are used most frequently **Bookline** took first place with 19% of indications, followed by **Alexandra** (9%) and **Extreme Digital** (7%).

The main players on Hungarian e-auctions market, according to internet user spontaneous awareness, are **Vatera** (64%), **Teszvesz** (35%) and **eBay** (35%). These online auction services are also the most frequently used ones.

## 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 questionnaires displayed randomly to internet users visiting selected Hungarian 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 Hungary, 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. The structural data was taken from gemius/Ipsos Audience study. 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.

### 2007 survey

The questionnaires were displayed on the following websites: nepzabadsag.hu, blick.hu and nemzetisport.hu. The data was gathered between 17th and 20th of September 2007. The final sample consisted of 1,777 questionnaires completed by Hungarian internet users aged 15 and above.

### 2009 survey

The questionnaires were displayed on: inda.hu, index.hu, totalcar.hu, portfolio.hu and sites belonging to Velvet Network. The data was gathered in the period between 15th and 21st of May 2009. The final sample consisted of 1,485 questionnaires completed, as in the previous survey, by Hungarian internet users aged 15 and above.



## Contact

Gemius Hungary Kft

1095 Budapest, Mester utca 87.

mob: + 36 20 543 3628

Contact person:

Ács Tamás

Mail: [tamas.acs@gemius.com](mailto:tamas.acs@gemius.com)

## 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 on the following markets: Scandinavia, UK, Austria, Turkey and in the Middle East.

Gemius SA provides a wide range of internet research to brand name clients throughout Europe. 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.

The company's goal is to go beyond statistics and to provide thorough knowledge to our clients, helping them to make the most of their investments in the online marketing channel.

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