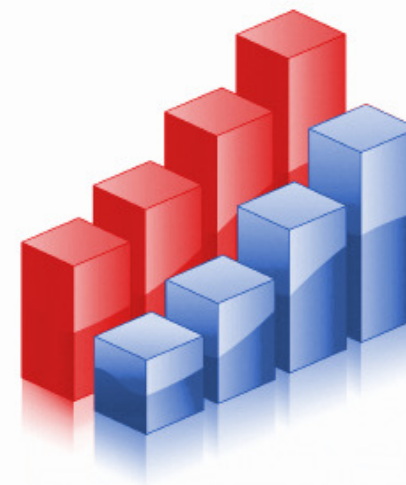


E-commerce in the countries of Central and Eastern Europe: Romania

- free version of the report

September 2006

March 2007, Warsaw, Poland



 Gemius

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Additionally in the commercial version of the report the following chapters are available:

- Summary (extended – 8 slides)
- General attitude towards shopping (extended – 25 slides)
- Shopping in online shops (12 slides)
- Shopping in online auctions (4 slides)
- Online shops vs. auctions (11 slides)
- Internet users who have never done online shopping (5 slides)

Full version of the report contains 76 slides.

Methodological approach

3

Methodological approach

- The research has been conducted in several countries of Central and East Europe:
 - the Czech Republic
 - Hungary
 - Latvia
 - Lithuania
 - Poland;
 - **Romania**
 - Russia
 - Ukraine
- In **Romania**, Gemius conducted the research in cooperation with : Rolro, Resursadefun, Smartfinancial, Speed Promotion and Vodanet.



Methodological approach

- The aim of the research project was to identify the attitude and usage preferences of Romanian Internet users towards online shopping in e-shops and in online auctions.
- The top lines of the report contains:
 - General attitude towards online shopping;
 - The most favorite products bought in the Internet;
 - The frequency of shopping in the Internet;
 - The e-shops sites ranking in Romania;
 - Attitude towards and usage of e-shops;
 - The auction sites ranking in Romania;
 - Attitude towards and usage of auctions;
 - Purchase intention of Internet users.
- The research has been conducted with the use of pop-up questionnaires sent randomly to the Internet users between 10th and 17th of October 2006. The sample of 1474 respondents was cleaned accordingly with the Gemius' standard and afterwards weighted with the use of structural data provided by Mercury Research. The findings are representative in terms of age, gender and frequency of Internet usage for the whole Romanian Internet population 15+. Information about sample size presented in the report refers to weighted data.

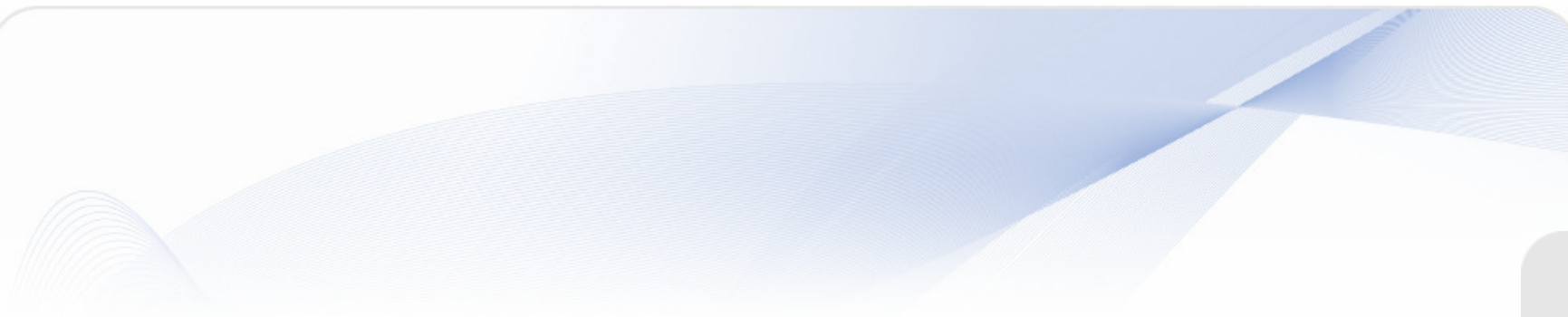
Executive summary

6

Executive summary

The top lines of the report shows the following:

- In the context of the Romanian e-commerce, e-buyers represent only 29% of the total online population.
- Home shopping is still in the incipient evolving phase. The majority of Internet users makes their payments in cash at delivery, instead of using bank transfers. This is the consequence of the opinion that making bank transfers is risky (44%).
- In Romania, online shops are more popular than auctions, therefore the domestic market edged up to 26% for online shops, whilst auctions maintain at a very modest level of 5% represented mostly by foreign auctions. e-Mag is the leader of on-line shops in Romania, it's unaided brand awareness reaching 25% of the choices of online shops buyers. Ranked behind are: Flamingo (8%), dc-shop (depozitul de calculatoare) (5%), Diverta and librerie.net (4% all). The undisputed leader of auctions in Romania is www.ocazii.ro accounting for 35% of total choices in the top of unaided brand awareness of auctions.



Summary

Summary

GENERAL ATTITUDE TOWARD SHOPPING (I)

- **Positive attitude towards shopping** in general (65% of Internet users love or like shopping) in tandem with the great awareness of online shopping (97%) are featuring the potential of the e-commerce market in Romania. When buying online, Romanians are concerned about the quality of products (37%) and saving money (21%). On the other hand they associate shopping with spending time in a pleasant way (19%).
- **The Internet is the preferred place** when looking for:
 - Photo equipment (35%);
 - Computer games (32%);
 - Travel services (32%);
 - Computers software (32%);
 - Phone and accessories (32%);
 - Computer hardware (30%);
 - Books, CDs/DVDs or film (28%);
 - Train, bus or plain tickets (24%).
- **Search engines** (48%) and **offers of different online stores** (35%) are the most favorite sources when looking for a given product on the Internet.

Summary

ONLINE SHOPS VS. AUCTIONS

	ONLINE SHOPS	AUCTIONS
REASONS FOR PURCHASING IN ONLINE	home delivery (42 %) saving time (40 %)	goods more difficult to find in other places (55 %) possibility of ordering at any time (47 %)
ADVANTAGE OF SHOPPING : ONLINE SHOPS VS. AUCTIONS	higher security (36 %)	easier procedure to purchase (49 %)
PROBLEMS	I don't have any problems (36 %) lack of information about products (23 %)	I don't have any problems (31 %) not receiving the ordered product (26 %)
MOST POPULAR PRODUCTS BOUGHT	phones and accessories(29 %) books, CDs, films (27 %)	computers (39 %) phones and accessories (37 %) clothes and jewelleries(36 %)
MOST POPULAR WAY OF PAYING	in cash at delivery (48 %) credit card(31 %)	in cash at delivery (42 %) directly at the seller (13 %)

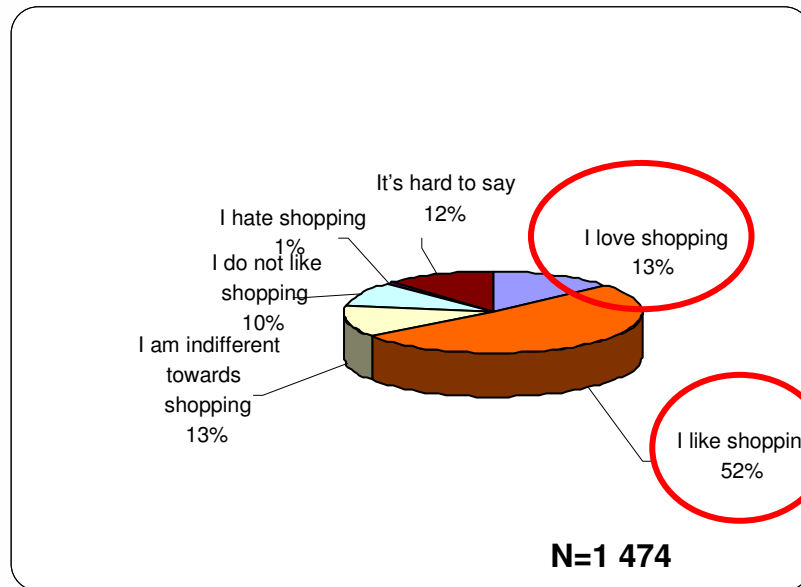
General attitude towards online shopping

11

General attitude towards online shopping

Q1. General attitude towards shopping

Q2. Most important criteria while buying



QUALITY OF PRODUCTS (37%)	I	SAVING MONEY (21%)	II
SPENDING TIME IN A PLEASANT WAY (19%)	III	SAVING TIME (11%)	IV

12

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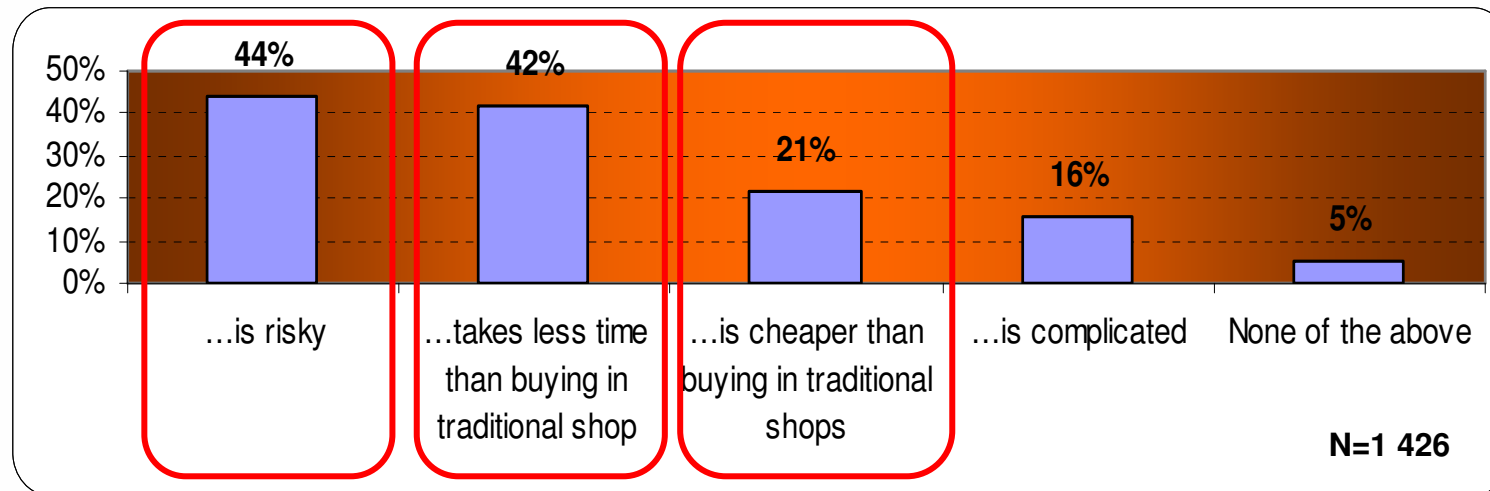
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General attitude towards online shopping

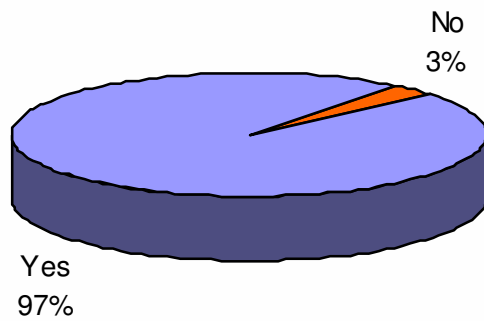
Q5. Internet users' opinion about buying on the Internet



The most prevalent feature associated with e-shopping is the lack of security while making transactions via the Internet. This negative featuring is ranked ahead of the positive opinions saying that that e-shopping saves time and it is cheaper than purchasing in traditional shops.

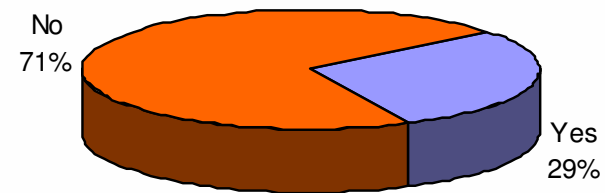
General attitude towards online shopping

Q4. Ever heard about online shopping



N=1 474

Q6. Ever done online shopping

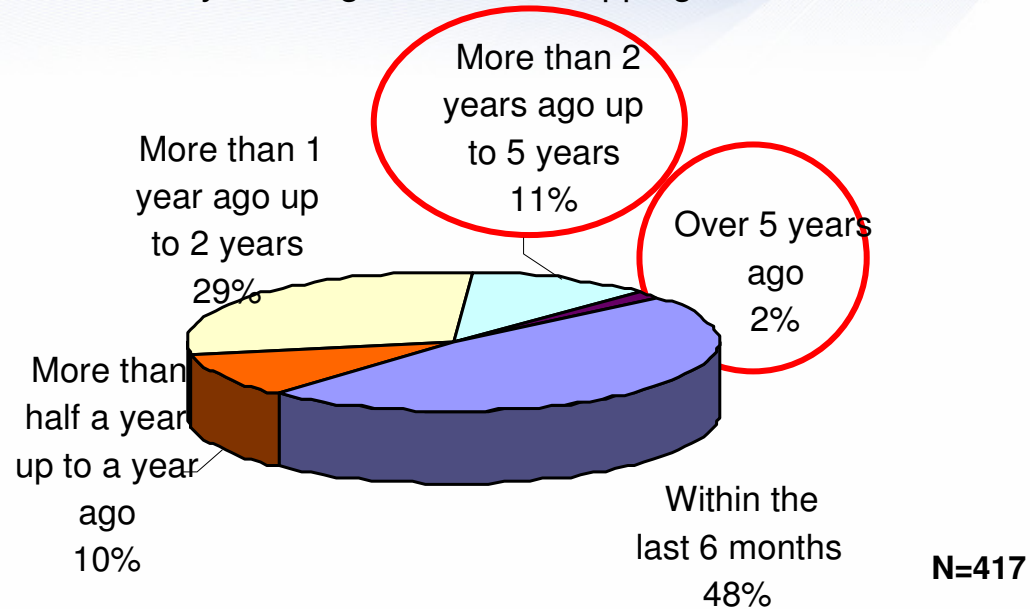


N=1 426

The awareness of online shopping is very high in Romania, but the actual purchase is done only by a third of those who have heard about this possibility.

General attitude towards online shopping

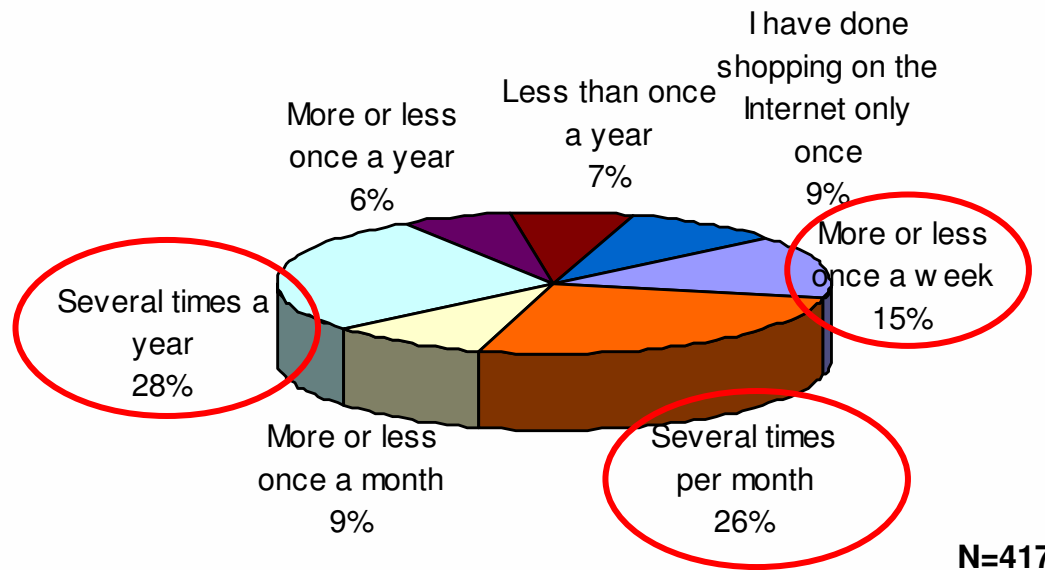
Q7. History of using the online shopping



Most of Internet users are new online shoppers and consequently, they used an online retail service only within the last year. Among Internet users who have ever done online shopping, experienced shoppers, with over 2 years of e-commerce practice constitute a minority accounting only for 12% of the total number of online shoppers.

General attitude towards online shopping

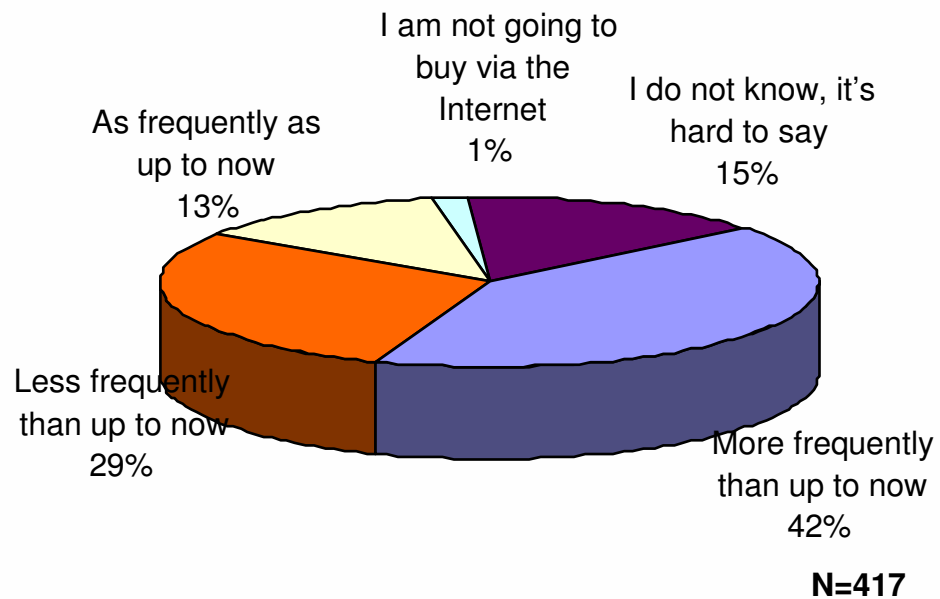
Q8.Frequency of doing online shopping



Quite a lot of online shoppers purchase on the Internet several times a year (28%). This figure is followed by those buying several times per month (26%). Only 15% buy more often (more or less once per week).

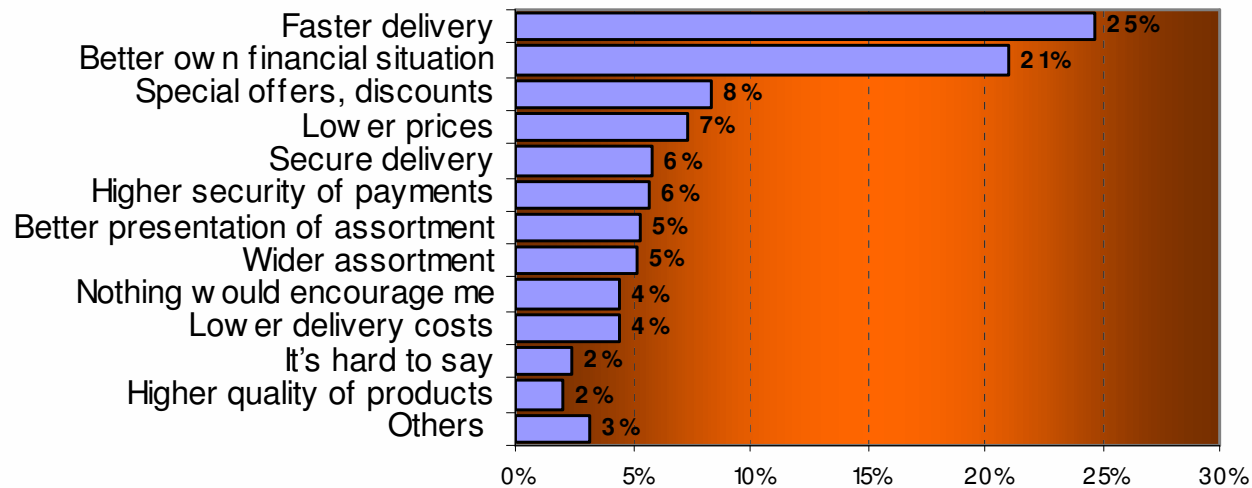
General attitude towards online shopping

Q12.Frequency of purchase intent in the future



General attitude towards online shopping

Q13. What would make e-shoppers buy more frequently



N=417

Demographics

19

Demographics

WORKING STATUS

N=1 474

I am a student	24%
I work	41%
I am a pensioner	3%
I am unemployed	3%
I am a housekeeper	1%
Other	29%

EDUCATION

N=1 474

Vocational	9%
High school	34%
Secondary vocational	4%
College	8%
University	34%
Postuniversity	10%

GENDER

N=1 474

Female	47%
Male	53%

AGE

N=1 474

15 to 19 y.o.	25%
20 to 24 y.o.	22%
25 to 29 y.o.	15%
30 to 34 y.o.	7%
35 to 39 y.o.	9%
40 to 44 y.o.	6%
45 to 49 y.o.	7%
50 to 54 y.o.	5%
55 to 59 y.o.	3%
60+ y.o.	3%

MARKET SIZE

N=1 474

Up to 999 inhabitants	2%
1 000 - 4 999 inhabitants	17%
5 000 - 19 999 inhabitants	14%
20 000 - 99 999 inhabitants	15%
Over 100 000 inhabitants	52%

INCOME

N=1 474

No income	15%
Up to 500 RON	14%
501 - 1000 RON	19%
1001 - 2000 RON	21%
2001 - 3000 RON	3%
More than 3001 RON	4%
I dont want to answer	24%

Demographics

N=1 474

FREQUENCY OF INTERNET USAGE

Every day	44%
3-5 times a week	4%
1-2 times a week	25%
1-3 times a month	27%

N=1 474

TYPE OF CONNECTION

Modem/ dial-up connection	19%
Broadband connection	44%
Others	21%
I do not know	16%

N=1 474

HISTORY OF USING THE INTERNET

Half a year or shorter	11%
Between half a year and a year	11%
More than 1 up to 2 years	10%
More than 2 up to 5 years	39%
Over 5 years	29%

Contact

Gemius Research SRL

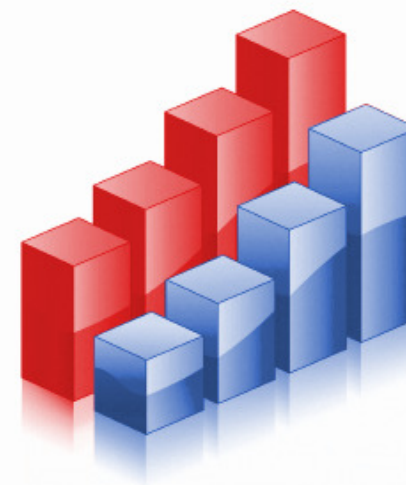
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