

E-commerce: trends and attitudes

Research into Ukrainian internet users

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Objectives

This report shows results of a study conducted in Ukraine by IIBR/Gemius.

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

This report discusses:

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



Research method

research
overview



The research was conducted using the CAWI method (computer-assisted web interviewing). The selection criteria for 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 Ukraine, the internet users 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.

Two study-related surveys were conducted: the first took place in 2009, the other in 2011; the final samples included internet users aged 15 and above in both studies.

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 answered a particular question.

Summary

In general, Ukrainian internet users have a **positive attitude towards shopping**: nearly half of them declares that they like or love this activity, which has not changed significantly since 2009.

The most important consideration in purchase decision-making is to buy **high quality products**, however this opinion has substantially decreased in popularity compared to 2009. Every fifth respondent expects shopping to be **a pleasant way of spending time**. It can be observed that currently Ukrainian internet users pay more attention to **saving money** than in previous study.

All surveyed respondents had heard about the possibility to shop online. The most widely known e-store, as seen in the unaided awareness results, is **rozetka.ua.com**, followed by several less recognizable competitors. In case of e-auctions, the most widely known names are **eBay** and **aukro.ua**

More than half of respondents appreciate the fact that **buying via the internet is cheaper than offline shopping**. Another advantage mentioned by internet users was the chance to **save time**. However, online shopping is still perceived risky, but this opinion is getting less popular than in the previous study. Also fewer people, compared to 2009, consider online shopping complicated. This may be the reason why more than four in five e-customers declared that they shopped on the internet more than once.

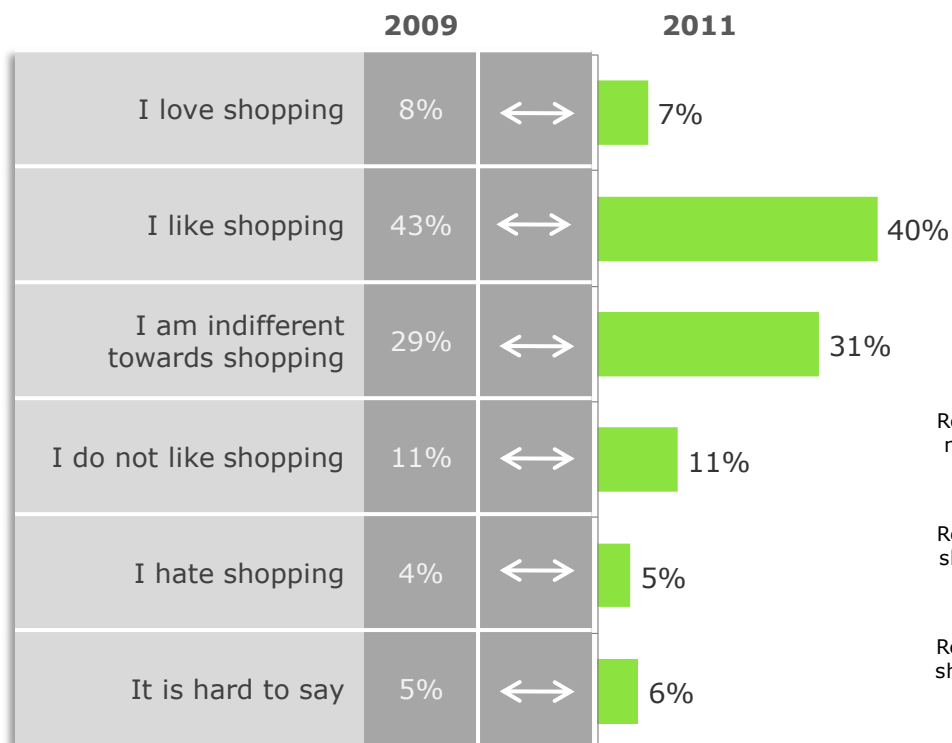
Consumer electronics and domestic appliances, along with computer hardware, phones and GSM accessories are the top three categories amongst purchases in web. Compared to the previous survey, clothes and jewellery gained popularity in this respect. Invariably, insurance, food and travel services are the least popular categories bought in e-stores by Ukrainian internet users.

Only one in five respondents with no online shopping experience is willing to purchase any products or services online in the future. A similar proportion remains indecisive.

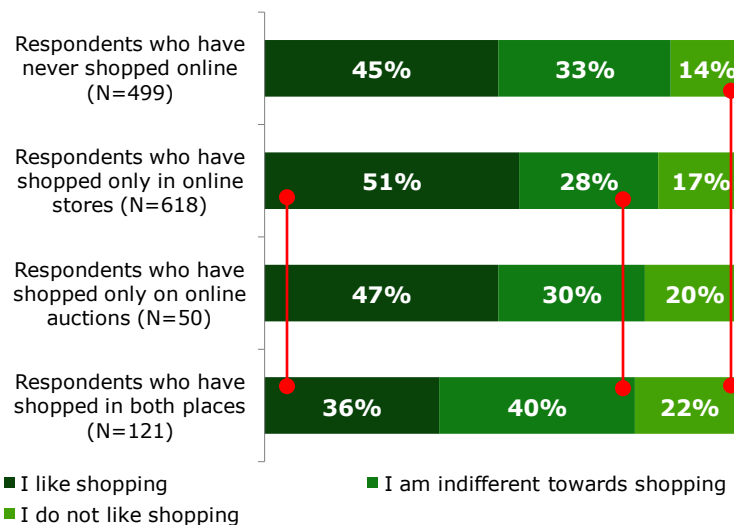
General attitudes towards shopping

Attitudes towards shopping

(SA) Some people like shopping, some do not. Apart from everyday shopping for food, what is your general attitude towards shopping?



In general, Ukrainian internet users see shopping in positive terms, as nearly half declares that they like or love shopping, compared to a mere 16% who do not like or hate this activity. The attitudes have not changed since the previous survey.



Base: all respondents

2009: N= 1,142

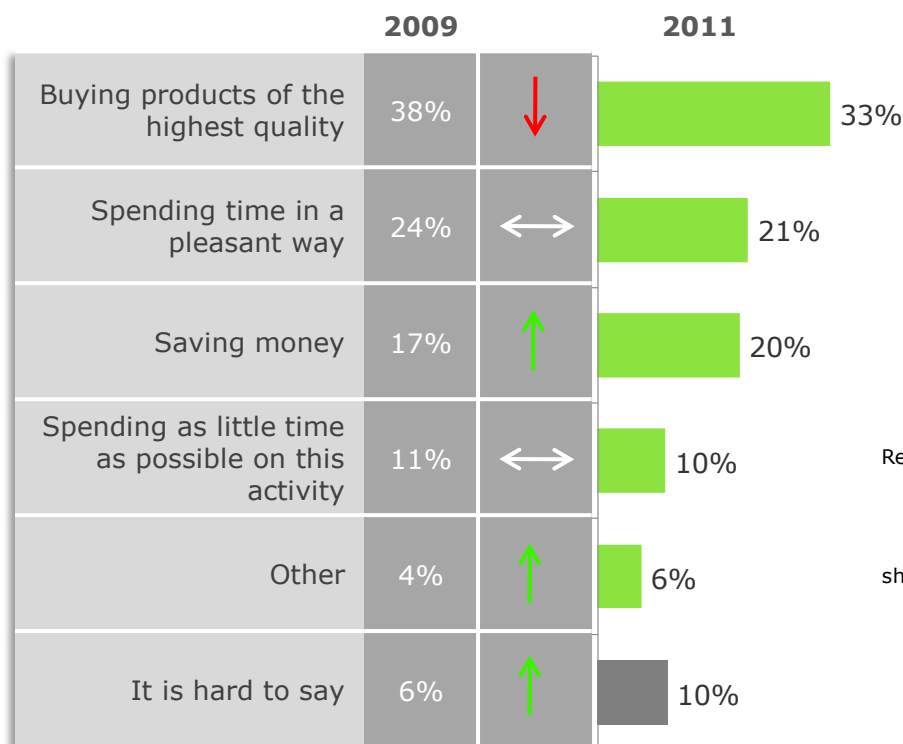
2011: N= 1,288

Source: gemiusReport "E-commerce in Ukraine: Trends and attitudes"; September 2009, April 2011

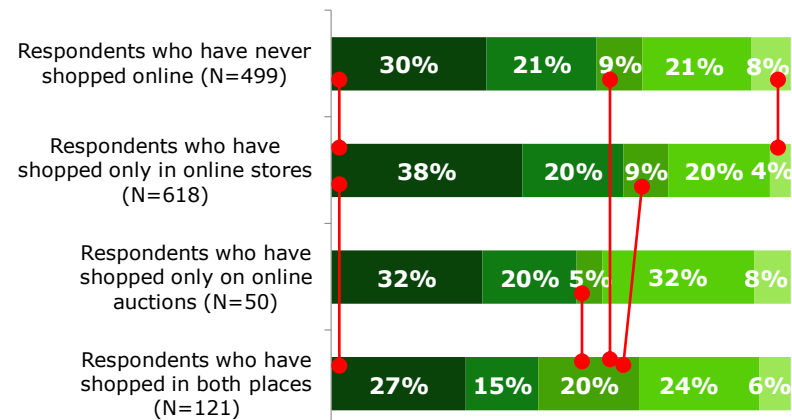
General attitudes towards shopping

Most important concerns while shopping

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



One in three Ukrainian internet users declare that the most important criterion while shopping is to buy high quality products – although this opinion is lower in share than in the previous study. Every fifth respondent expects shopping to be a nice way of spending time. Also Ukrainian internet users pay more attention to such aspect of online shopping like saving money.



■ Buying products of the best quality
 ■ Saving money
■ Spending as little time as possible
 ■ Spending time in a pleasant way
■ Other

Base: all respondents

2009: N= 1,142

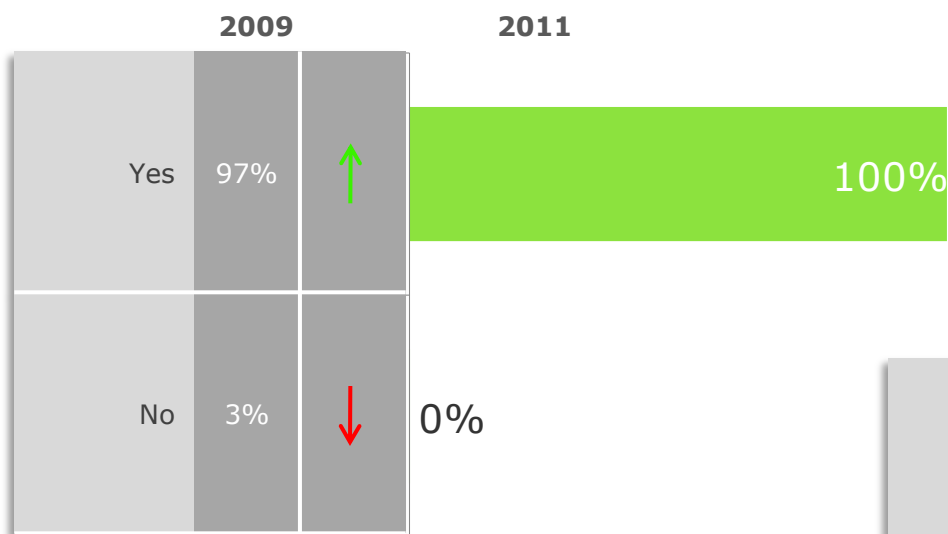
2011: N= 1,288

Source: gemiusReport "E-commerce in Ukraine: Trends and attitudes"; September 2009, April 2011

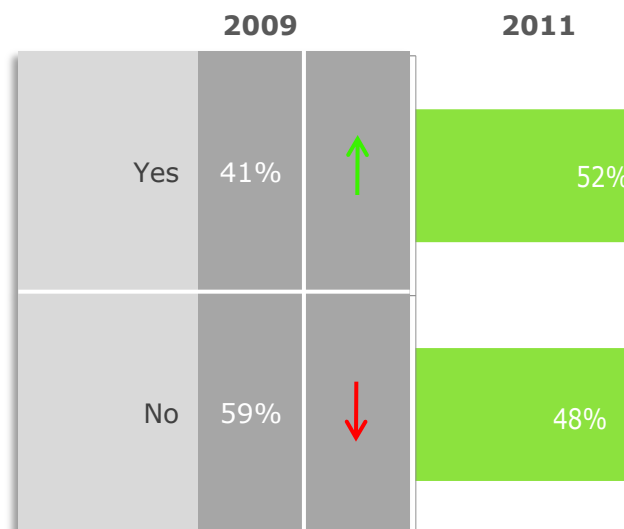
General attitudes towards online shopping

Awareness and experience of online shopping

(SA) Have you ever heard of the possibility of shopping on the internet?



(SA) Have you ever shopped on the internet?



All surveyed respondents had heard of the possibility of shopping via the internet. This means that there is no point in improving the awareness of e-shopping among internet users. More than half of internet users have shopped online, which is a substantial increase when compared to the previous wave of the study.

Base: all respondents

2009: N= 1,142

2011: N= 1,288

Source: gemiusReport "E-commerce in Ukraine: Trends and attitudes"; September 2009, April 2011

General attitudes towards online shopping

Perception of online shopping

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



The most prevailing opinion concerning online shopping is that it is cheaper than buying in traditional shops (significant increase since 2009). However, it is still perceived as risky by two in five internet users. Note: when compared to the previous wave of the study, fewer consider it risky and complicated, which means that internet users became more accustomed to this kind of shopping.

Base: respondents who have heard of the possibility of online shopping

2009: N=1,116

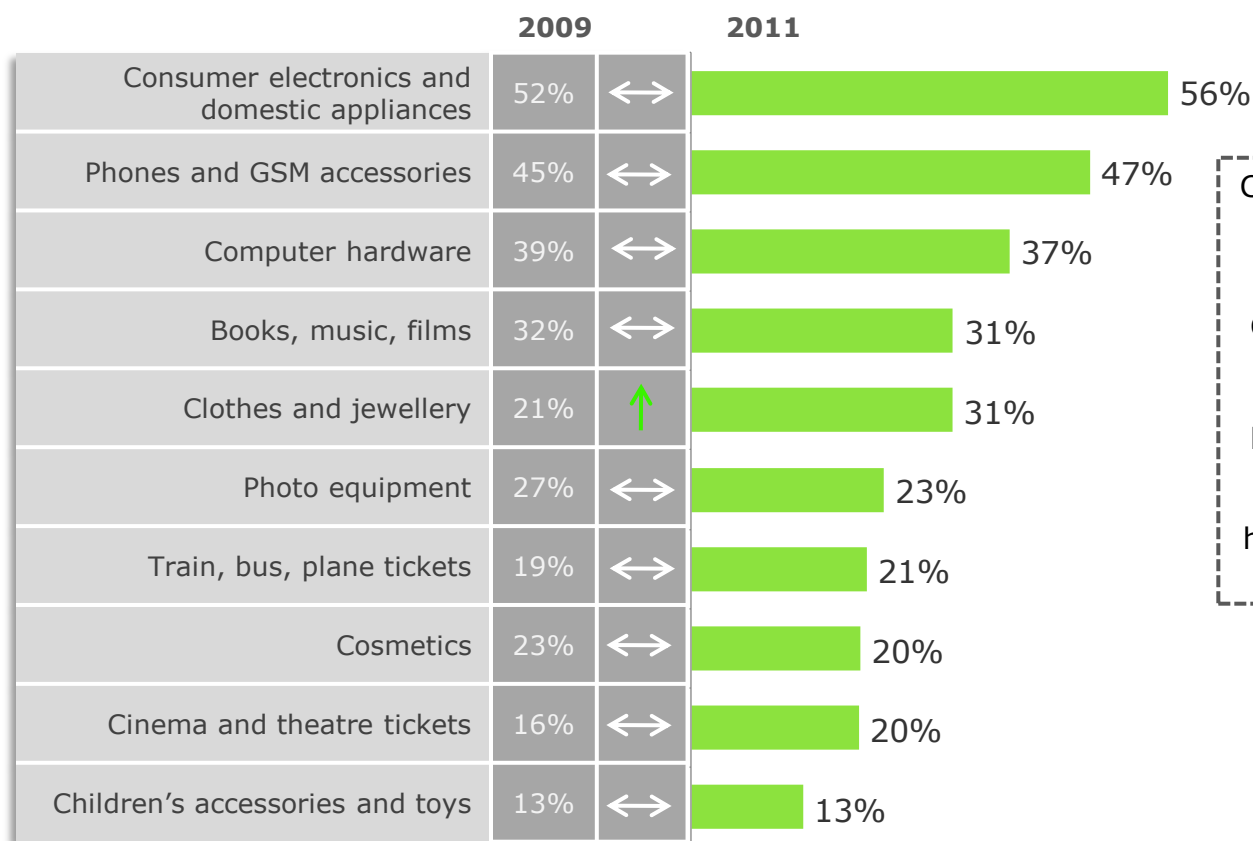
2011: N=1,285

Source: gemiusReport "E-commerce in Ukraine: Trends and attitudes"; September 2009, April 2011

Online stores

Products bought in online stores – TOP 10 CATEGORIES

(MA) Which of the products given below have you bought in an online store?



Consumer electronics and domestic appliances, along with computer hardware, phones and GSM accessories are the top three categories amongst online purchases. Compared to the previous survey, clothes and jewellery have gained popularity in this respect.

Base: respondents who shopped in online stores

2009: N= 592

2011: N= 739

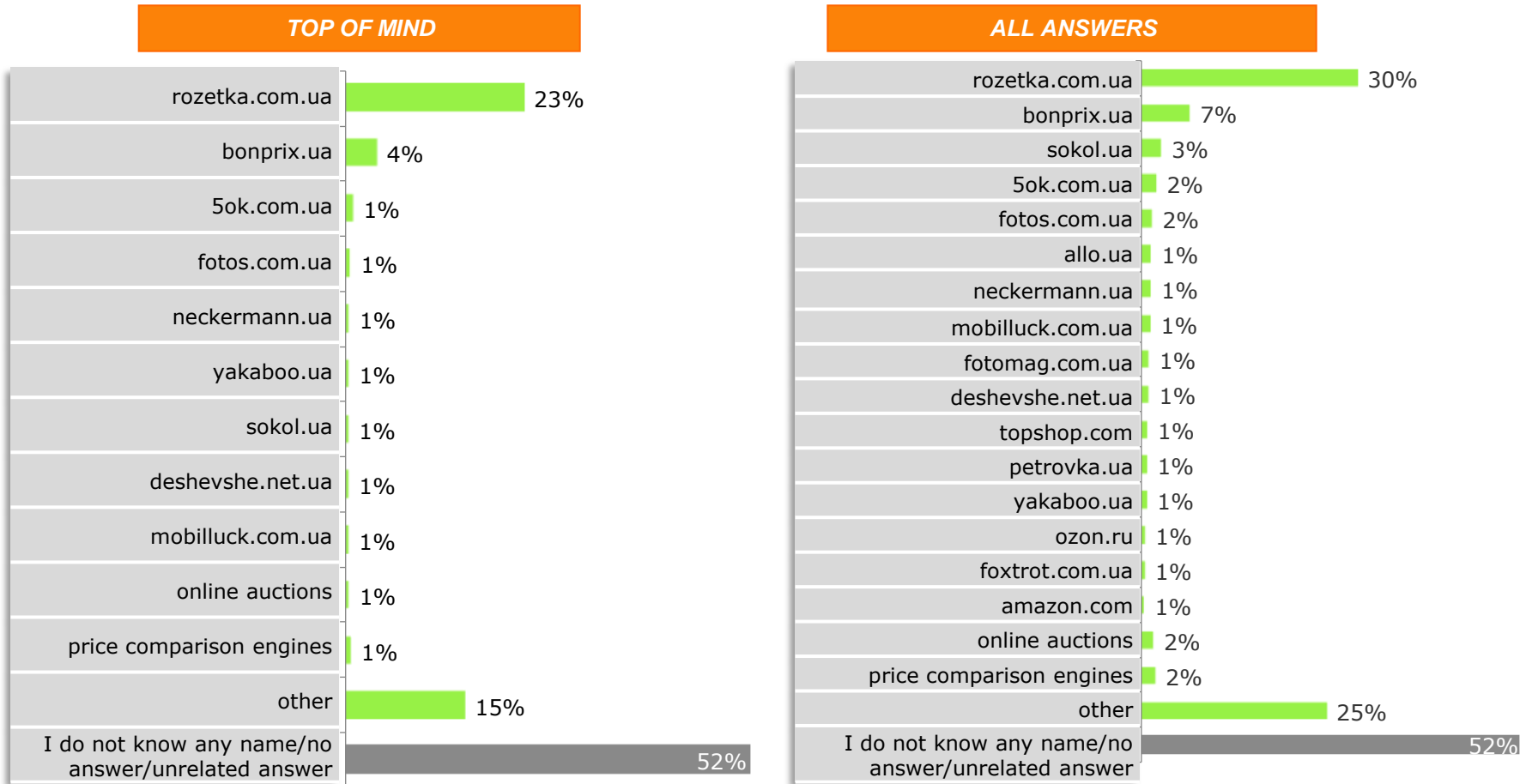
Source: gemiusReport "E-commerce in Ukraine: Trends and attitudes"; September 2009, April 2011



General attitudes towards online shopping

Online stores – unaided awareness

(OA) Please list up to three names of online stores that come to your mind first.



Base: respondents who have heard of the possibility of online shopping

2011: N= 1,288

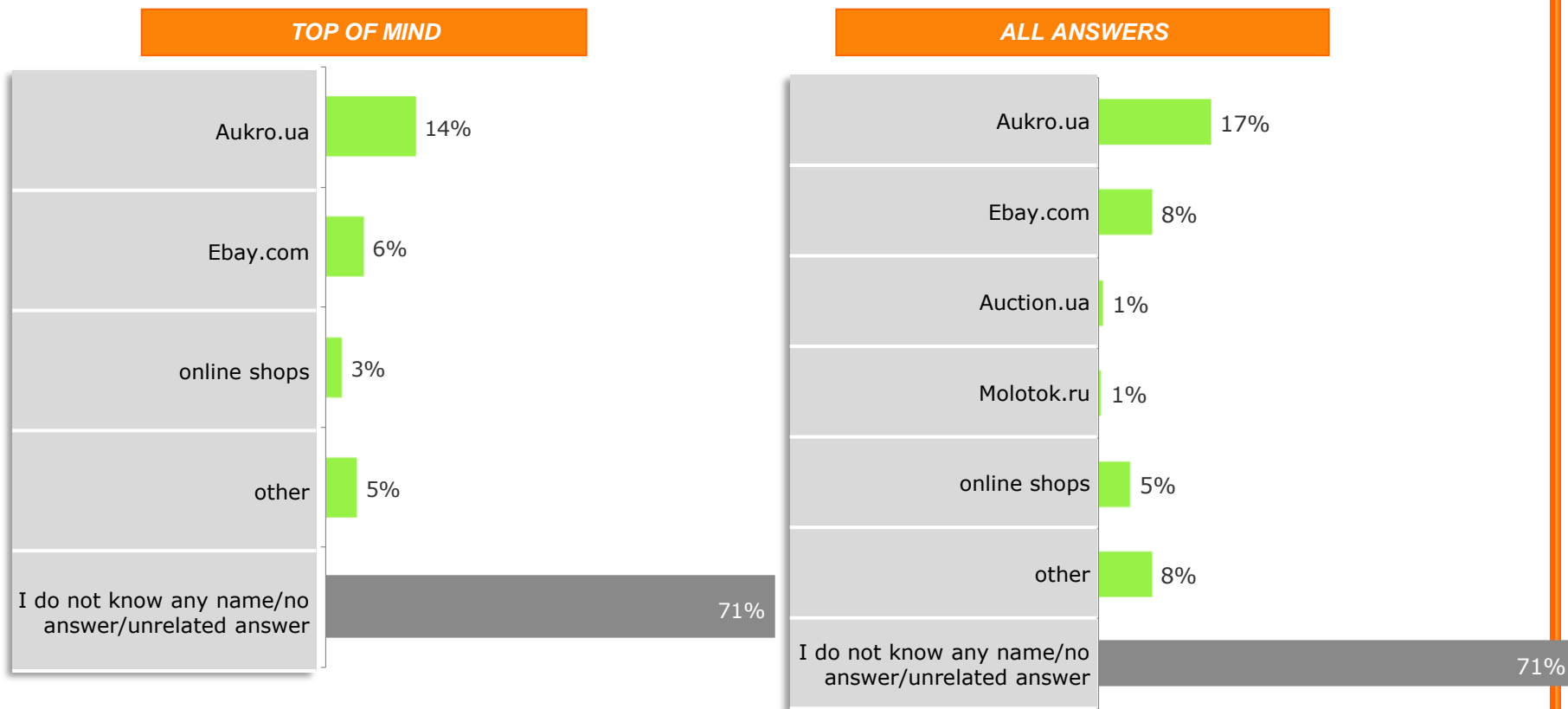
Source: gemiusReport "E-commerce in Ukraine: Trends and attitudes"; September 2009, April 2011



General attitudes towards online shopping

Online auctions – unaided awareness

(OA) Please list up to three online auctions that come to your mind first.



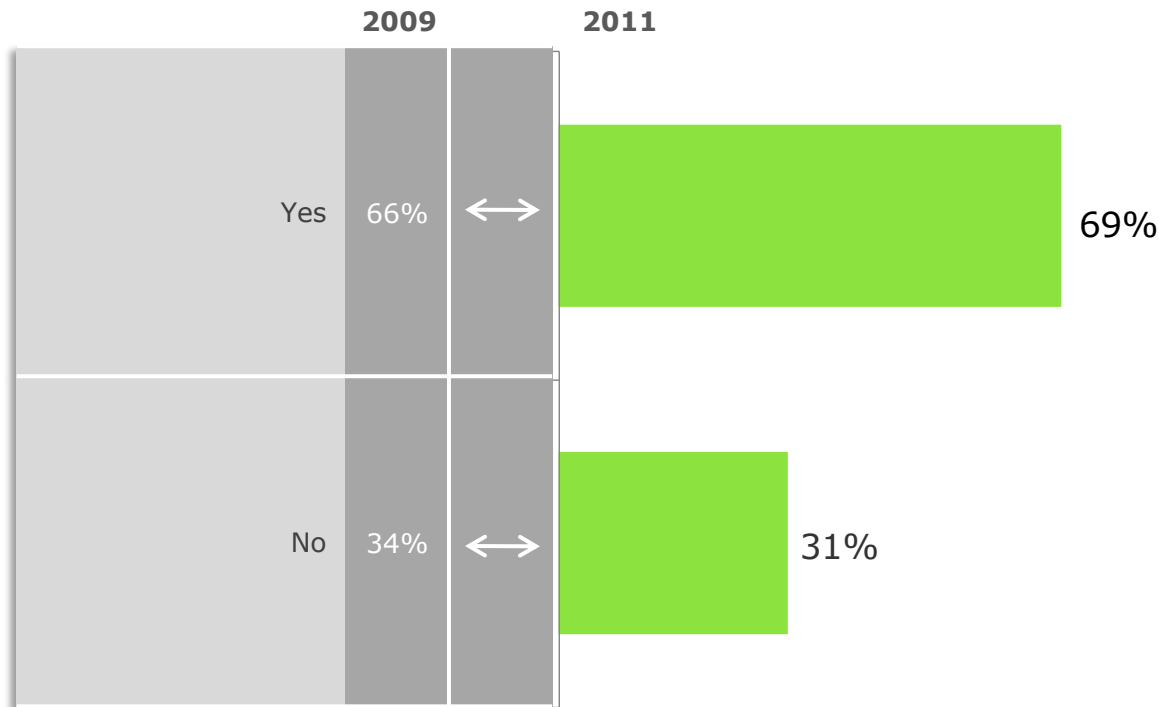
Base: respondents who have heard of the possibility of online shopping.
2011: N= 1,288

Source: gemiusReport "E-commerce in Ukraine: Trends and attitudes"; September 2009, April 2011

Respondents with no online shopping experience

Online shopping consideration

(SA) Have you ever considered buying something on the internet?



Invariably, the majority of the Ukrainian internet users who never shopped online, have been willing to buy something this way.

Base: respondents who have heard about online shopping but have never done it

2009: N= 490

2011: N= 496

Source: gemiusReport "E-commerce in Ukraine: Trends and attitudes"; September 2009, April 2011

About Gemius - Gemius is an international research agency, the leader and forerunner in the field of research of the internet and on the internet in Europe. Originating in Poland, Gemius has expanded across the EMEA region and is now currently operating in more than twenty markets.

The company is the pioneer of the full hybrid methodology for online audience measurement, integrating both consumer panels and advanced site-centric research, giving media planners highly credible results (gemiusAudience). It also offers professional research solutions, analytical and advisory services, from site-centric and user-centric studies to technologically-advanced tools for studying internet user behaviour on chosen websites (gemiusTraffic), internet user socio-demographic profiles (gemiusProfile), the quality of WWW page usage (gemiusUsability) and the effectiveness of internet advertising campaigns (gemiusEffect).

Gemius also conducts research related to subjects submitted by customers (gemiusAdHoc). Apart from the above-mentioned research services, Gemius offers studies on the behaviour of users who view online multimedia content (gemiusStream) and a research tool for immediate measurement and presentation of all clicks made by internet users on a website.



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