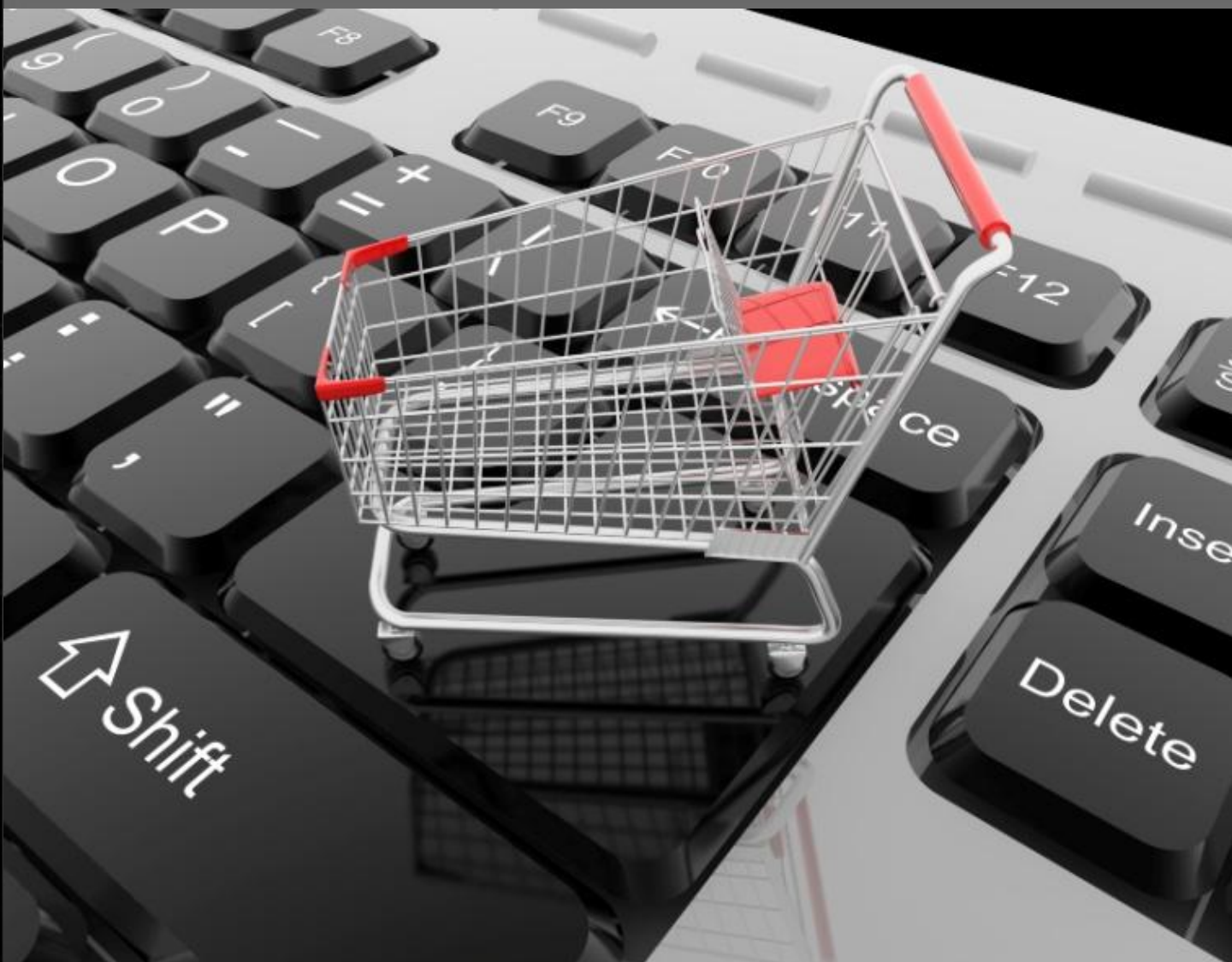


E-commerce 2010: trends and attitudes

Research into Czech internet users

Complimentary report



About the study

The report shows selected results of the **2010 e-commerce study** conducted in the Czech Republic by Gemius in partnership with **the Centrum Holdings network, Internet Info** and **Ringier**. The study is a part of a research project concerning countries from Central Europe.

Objectives

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

In the Czech Republic, four study-related surveys were conducted: the first took place in 2007, the second in 2008, the third in 2009 and the fourth in 2010.

Content

The short version of the report shows chosen 2010 results in the form of charts and presents key findings in a descriptive form.



Countries included in the 2010 e-commerce study

Countries where the e-commerce 2010 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 conducted in 2009, 2010, and discusses:

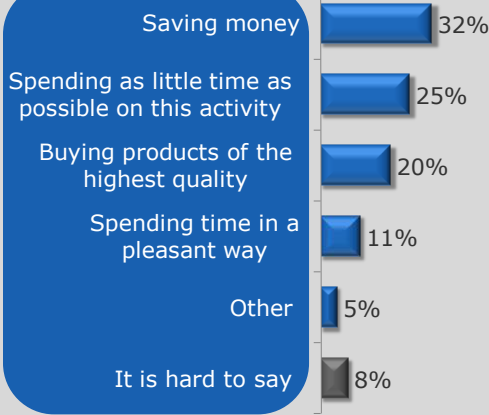
- General attitudes towards online shopping
- Frequency of shopping on the internet
- Ranking of e-shop websites in the Czech Republic
- Attitude towards and usage of e-shops
- Ranking of e-auction websites in the Czech Republic
- Attitudes towards and usage of e-auctions

In cases where the results were comparable, the statistical significance of particular differences between the years 2009 and 2010 was investigated.



General attitudes towards shopping

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



N= 1,750 – all respondents

Over half of Czech internet users enjoy shopping. Negative attitude was expressed by one in five respondents.

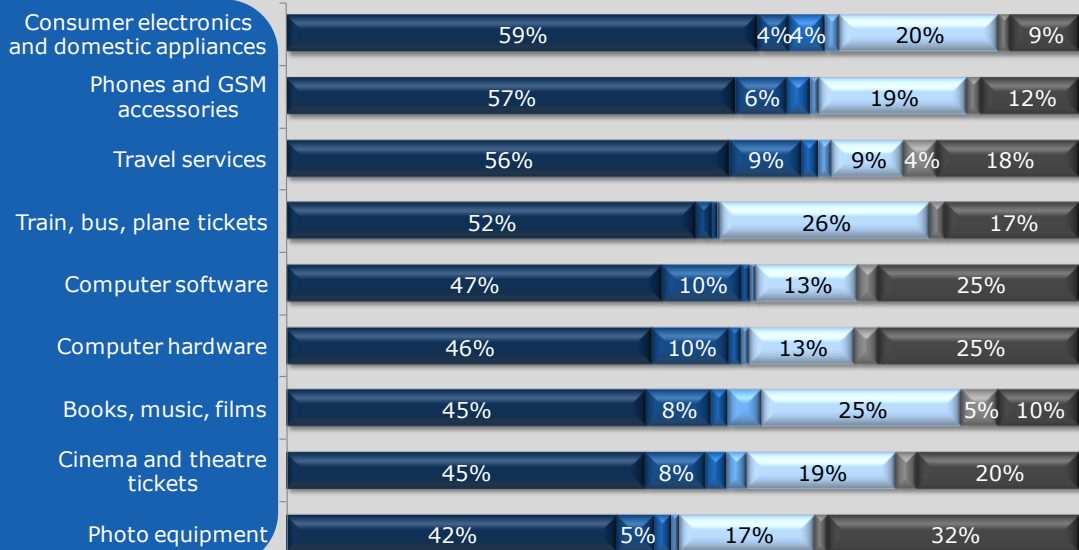
While shopping, Czech internet users are most frequently focused on saving money and time. It is followed by buying products of the highest quality and spending as little time as possible.

The internet is an increasingly frequently-used source of information about planned purchases. The top-three product categories researched online include consumer electronics and domestic appliances, phones and GSM accessories and travel services (each indicated by more than a half of

respondents). Excluding the internet, many respondents want to get information about products personally from shop assistants.

As compared to the previous year, even more Czech internet users, looked online for information concerning consumer electronics and domestic appliances, phones and GSM accessories and film or theatre tickets.

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= 1,750 – all respondents



General attitudes towards online shopping

Two in three respondents who have heard of such a possibility share the opinion that it is cheaper and over half that it is less time-consuming than buying in traditional shops. However, almost one in three internet users still perceives online shopping as risky.

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



N= 1,747 - respondents who have heard of the possibility of online shopping

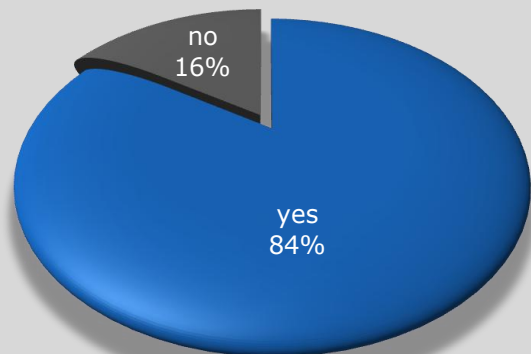
The popularity of price comparison engines has grown since 2009. In 2010 nearly two third of online shoppers declared they have used such a website before. The most popular price comparison engines in the Czech Republic are Heureka.cz, Zbozi.cz and Najlepsiceny.cz. The share of respondents who cannot recall any price comparison engine brands decreased over the last year.

An upward trend in online shopping popularity observed in the previous years of the study, continued in 2010. More than four in five Czech internet users state that they have shopped on the internet. The most popular pattern of searching for products or services which are to be bought online is the use of search engines, and looking through the offers of online stores. Worthy of note is the fact that price comparison engines have gained importance in process of online search for goods.

Almost three in four Czech internet users who buy online have done purchase within

a month before the study, the biggest share of them spent up to 4,000 Kč during one month.

Have you ever shopped on the internet?



N= 1,750 - all respondents



Online stores vs. online auctions

Invariably since 2007, e-shops are far more popular than e-auctions - nearly nine in ten Czech internet users have shopped in e-stores, two in five – on e-auctions.

	ONLINE STORES	ONLINE AUCTIONS
Reasons for purchasing online	Lower prices compared to traditional shops (70%)	Lower prices compared to traditional shops (70%)
Encountered problems	Long product delivery time (20%)	Long product delivery time (19%)
The most popular payment methods	Cash on delivery (77%)	Bank transfer (69%)
The most popular products	Consumer electronics and domestic appliances (56%)	Clothes and jewellery (42%)

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

In the ranking of online stores, the top three places are occupied by Alza.cz (unaided awareness amounted to 27%), Mall.cz (16%) nad Kasa.cz (9%) .

The undisputable leader in unaided awareness of e-auctions is Aukro.cz spontaneously recalled by 69% of Czech internet users. It is followed by eBay with unaided awareness accounting for 14%.

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 Czech 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 the Czech Republic, 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.

2009 survey

The data was collected in the period from the 29th of June to the 6th of July 2009. Questionnaires were displayed on: seznam.cz and the Centrum Holdings websites. The final sample consisted of 1,500 questionnaires completed by Czech internet users aged 15 and above. The structural data was taken from NetMonitor (July, 2009).

2010 survey

The data was collected in the period from the 9th to the 25th of November 2010. Questionnaires were displayed on: Centrum Holdings, Internet Info and Ringier Axel Springer websites. The final sample consisted of 1,750 questionnaires completed by Czech internet users aged 15 and above. The structural data was taken from NetMonitor (October 2010).



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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.

