E-shopper barometer 2022

Romania report

Parcel delivery network of GeoPost

Executive Summary

1. E-commerce –stable after the increase observed in the number of e-shoppers and regular e-shoppers in 2021, though they receive less parcels in 2022

- Contrary to the European downward trend, the share of Romanian e-shoppers remains stable this year. Same can be observed when it comes to regular e-shoppers: after the strong increase observed in 2021, they still represent a bit more than 1 out of 2 e-shoppers.
- Regular e-shoppers are still deeply convinced by the benefits offered by e-commerce, they see it as a more stress-free way of shopping, it also saves them time and money, but it is less true than in the past.
- Although they receive less parcels on a monthly basis, they continue to buy the same product categories online as in 2021. Beauty/healthcare and fashion being bought by the majority, 'shoes' purchase levels stay the same after the online boom during the pandemic, and medicine is bought by even more regular e-shoppers online this year.

2. Given the Ukraine war and its economic consequences, e-shoppers remain price-sensitive

- Almost 70% of Romanian regular e-shoppers consider that price is the most important factor in their purchase decision, and the same number are looking forward to big discount events, while even more of them, 80%, are on the hunt for really good deals.
- After the increase observed in 2021, there are still more than 1 out of 3 regular e-shoppers who buy fresh food and beverages on the internet. Interestingly, the drivers for purchasing these categories online change.
- Covid-19 triggered the online purchases in 2021, while in 2022, the flexibility of online purchase, convenience and time-saving aspects are the main motivating factors.

3. C2C platforms usage and e-shopping through social media is quite common among regular e-shoppers

- 6 in 10 regular e-shoppers are buying and/or selling on C2C platforms, and 3 out 10 claim they have increased their second-hand product purchases.
- The number of people buying from individuals is on par with the European average. While, for the moment, compared to the European average less Romanian regular e-shoppers sell on CtoC platforms. They use this type of new e-commerce for the same reasons as other Europeans: they can buy products at a lower price, and for those who sell, it allows them to free up space, to get rid of non-used items as well as to earn extra money. The fact that it is a way to consume more responsibly is the second purchase driver among C2C buyers, though only a third of them mention it.
- Social media is used by 90% of regular e-shoppers for shopping purposes, 66% shop directly for them. Furthermore, these platforms are used or to find inspiration and collect information on products and services.

Executive Summary (2/2)

4. The online purchase and delivery experience perception is still positive in 2022

- Over the past 3 years, the online purchase experience, online effort and delivery effort are satisfactory
  - 81% of regular e-shoppers find their last delivery easy
  - 80% evaluate their last online purchase as easy
  - 79% consider their last online purchase experience as excellent or very good

  This is an important matter given the high portion of e-shoppers who publish feedback after purchasing, sharing rating and recommendations.
- At the same time, it is important to notice that Romanian regular e-shoppers have high expectations towards delivery services
  - Knowing and being able to select the day and 1-hour slot of the delivery are still expected by 90% of regular e-shoppers, despite a decrease this year. And a high share of regular e-shoppers have already used delivery services that allow them to be delivered on a specific day and 1-hour window or within 1 to 2 hours.
  - Moreover, 90% of them were notified via email or SMS.
  - Unsurprisingly, their main delivery preference consists in knowing the exact one-hour time slot of the delivery, receiving real-time information and advanced notifications, and having the ability to select in advance the precise window of the delivery.
- Given all this, knowing the name of the delivery company is becoming increasingly important. Regular e-shoppers find it reassuring when they are familiar with the carrier and also want to choose the one with the best services.
- Lastly, while only 7% of regular e-shoppers returned their last purchase, the return process is perceived as less easy than in the past. Important to know, the majority of regular e-shoppers checked the return policy when they needed to return the parcel. And, in most cases, the carrier picked up the parcel at the e-shoppers' home for return.

5. The online heavy buyers,"The Aficionados", are satisfied with their online purchase experience

- This specific group of e-shoppers continues to buy more product categories online than European Aficionados, despite buying on average 1 less product category online than in 2021, and the strong decrease in the number of parcels they receive per month (5 parcels per month in 2022 vs 7,7 in 2021).
- They use C2C platforms frequently and like this new type of e-commerce for the lower prices, and they are also able to free up space.
- Aficionados overall are satisfied with their online purchase, but similar to regular e-shoppers, they find their last return less easy than in the past and on top of that, they are less satisfied with their last online purchase experience overall.
- Aficionados have the same drivers as regular e-shoppers when it comes to buying online. They consider it important to know the carrier's name at check out.

E-shopper barometer 2022

Methodology

Sample

18+ y.o. European e-shoppers who have ordered physical goods online since January and then, received at least one parcel, identified within a sample representative of the national population in age, gender, and SEC.

For the consolidated results at European level, a weight was applied to each country in order to reflect the right proportion of e-shoppers between the European countries.

Key targets

- Regular e-shoppers:

E-shoppers aged 18 to 70 years old, who buy at least one product category every month online.

- Aficionados:

15% of the total e-shoppers with the highest number of annual online purchases.

New country added in 2022: Bulgaria

Methodology

Data collection

- Online data collection (blind: interviewees do not know who requested the study)
- 23,974 interviews across 22 European countries (unweighted)
- Number of interviews achieved per country (unweighted):

  - Austria: 1,001
  - Belgium: 1,000
  - Bulgaria: 1,001
  - Croatia: 801
  - Czech Republic: 1,001
  - Estonia: 755
  - France: 1,498
  - Germany: 1,487
  - Hungary: 1,000
  - Ireland: 1,001
  - Italy: 1,525
  - Latvia: 801
  - Lithuania: 800
  - Netherlands: 1,000
  - Poland: 1,500
  - Portugal: 1,000
  - Romania: 1,000
  - Slovakia: 1,000
  - Slovenia: 802
  - Spain: 1,501
  - Switzerland: 1,000
  - UK: 1,500

Fieldwork

- Fieldwork conducted from May 30th to July 26th, 2022

Legend for evolutions

Significant differences

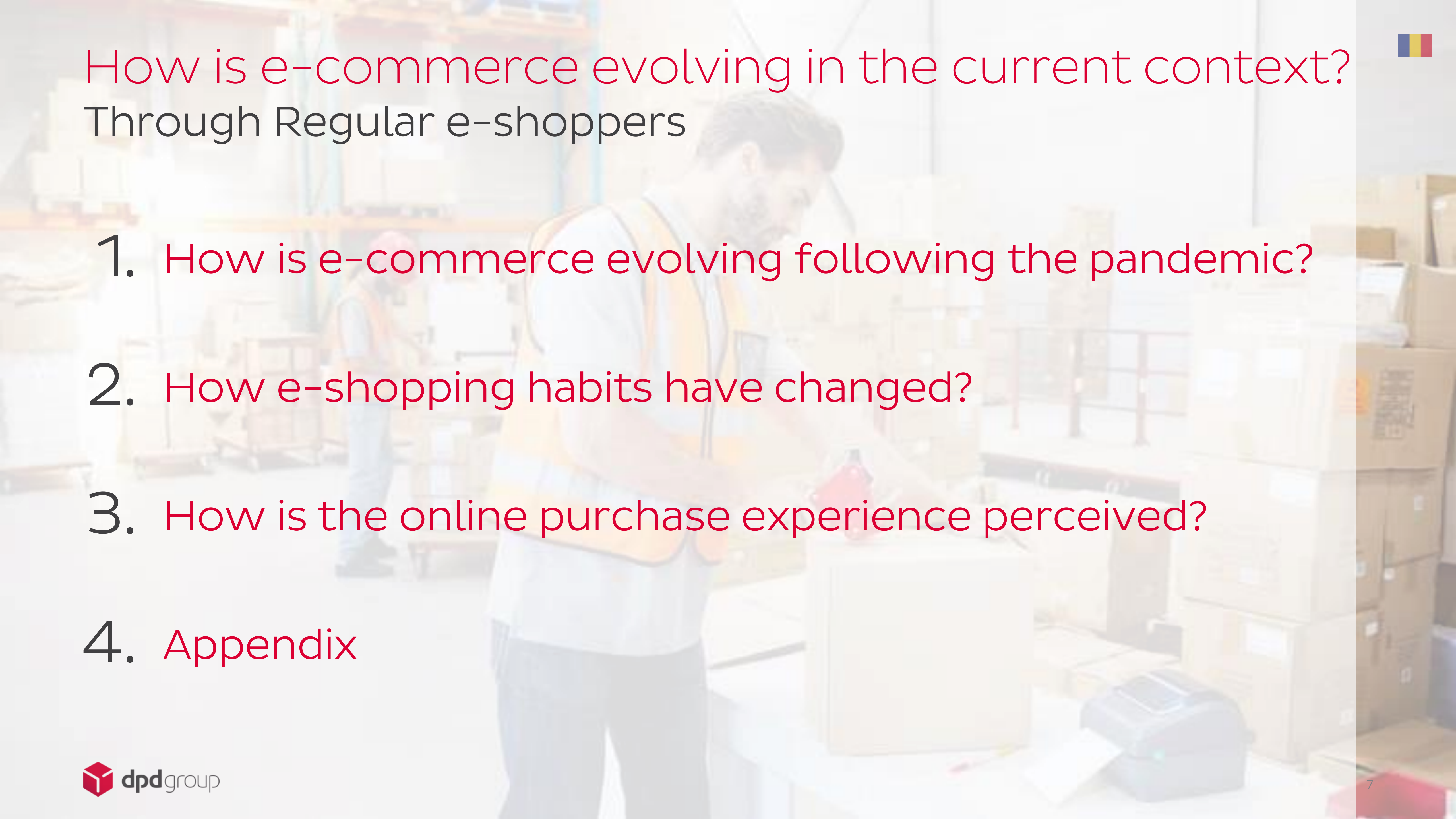
between 2022 and 2021 scores are shown as follows (at 95% confidence rate)

when **positive**: +xx ▲

when **negative**: -xx ▼

with +/- xx the number of points difference vs. 2021.

No arrow if no significant difference



How is e-commerce evolving in the current context?

Through Regular e-shoppers

1. How is e-commerce evolving following the pandemic?
2. How e-shopping habits have changed?
3. How is the online purchase experience perceived?
4. Appendix

1.

How is e-commerce evolving following the pandemic?

- Same number of e-shoppers in Romania in 2022, after the growth in 2021
- A stable share of regular e-shoppers as well
- Strong decrease in the number of parcels received by Aficionados, after the increase observed in 2021

Total e-shoppers

E-commerce key trends

The number of e-shoppers remains stable this year, after the increase observed in 2021 during the Covid-19 pandemic. As for the share of regular e-shoppers, it remains stable.

Share of e-shoppers among total population

2019 73%

2021 78% ▲

79%

77%
European average

of all Romanian are e-shoppers

Share of regular e-shoppers among total e-shoppers

2019 46%

2021 55% ▲

52%

48%
European average

of all e-shoppers are regular e-shoppers

▲▼ Significant increase/ decrease between 2021 and 2019

Regular e-shoppers

Key facts about regular e-shoppers

Though regular e-shoppers‘ purchases still account for the majority of all online transactions, they receive less parcels on average this year, while it was the opposite last year.

2019 88%

2021 94%

90%

87% European average

% of all online purchases made by regular e-shoppers

2019 11,9%

2021 14,3%

16,1%

15,4%

Average share of online shopping
(in total shopping – average of all categories)

2019 3,4

2021 4,4 ▲

3,6 -1 ▼

5,3 European average

number of parcels received last month

Last purchase preparation

25%

27% European average

Sudden impulse

▲▼ Significant increase/ decrease between 2021 and 2019

Regular e-shoppers

Profile of regular e-shoppers

Female

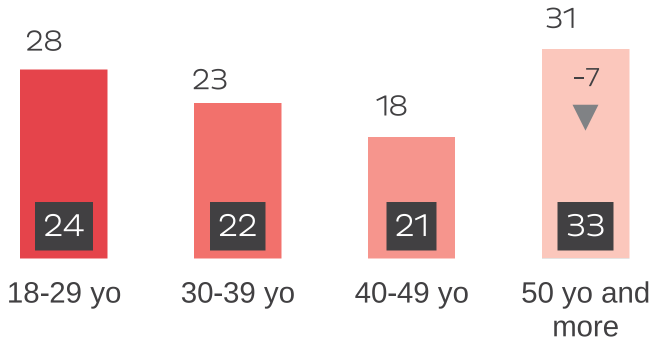
56%

56%
European average

Age

40,5 y.o

42,4
European average



Income

39%

Upper

44%
European average

Marital status

			European average
20%	Single		29%
57%	Married		45%
14%	Cohabitation	+4 ▲	17%
6%	Divorced		7%

City size

89%

+9 ▲

Urban

86%
European average

Definition

The **regular online shoppers** are e-shoppers :

- aged 18 to 70 years old
- who buy at least one product category every month online

4%

Have started purchasing online this year (2022)

8%

6%

-10 ▼

Have started purchasing online last year (2021)

6%
European average

RS0; RS1; RS2; RS2RECAP; RSX; S2; C1; A2

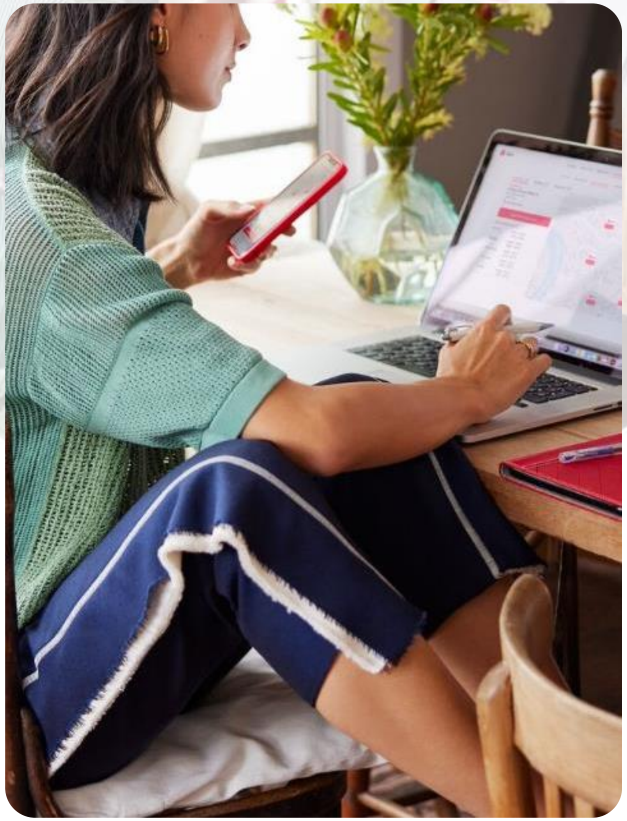
Zoom on the Aficionados

Aficionados, the heaviest e-buyers, receive much less parcels than in 2021, dropping back to pre-pandemic levels.

Zoom on the Aficionados

Aficionados online purchase habits at a glance

After the strong increase in the number of parcels received in 2021, a reversed trend is observed this year, Aficionados receiving almost 3 parcels less per month than in 2021. Yet, their online shopping still represents a high share of the overall online purchases.



2019	2021
59%	68%

58%

European average
59

% of all online purchases made by the Aficionados

2019	2021
16,2%	19,6%

23,1% ✚

21,6%

Average share of online shopping
(in total shopping – average of all categories)

2019	2021
4,8	7,7 ▲

5,0

✚(3,6)
-3 ▼

European average
7,5

number of parcels received last month

Last purchase preparation

26%

European average
28

Sudden impulse

✚ ▬ vs. regular e-shoppers at 95% confidence rate ▲▼ Significant increase/ decrease between 2021 and 2019

How e-shopping habits changed?

- Regular e-shoppers e-shoppers remain price sensitive and look forward to really good deals and big discount events
- Fresh food and beverage online purchases remain strong in 2022
- C2C e-shopping: a quite common practice allowing to save/earn money

2.

Regular e-shoppers' image of e-shopping

Online shopping is perceived as a way to reduce the stress of shopping in stores, it allows to save time and is convenient, but much less than in the past, which may explain why e-shoppers receive less parcels overall.

"Shopping online strongly reduces the stress of buying in stores" – %T2B

69%

-7 ▼

66%

"Shopping online is so convenient that I use it more and more, even if I must return my purchases sometimes" – %T2B

63%

-11 ▼

61%

"Shopping online saves time" – %T2B

79%

-6 ▼

77%

"I can shop for nearly 100% of the products/services I need online" – %T2B

63%

55%

G11 – Here are some statements about shopping. To what extent do you personally agree or disagree with the following statements?)

xx% European average

Regular e-shoppers

Attitude towards price

61% of regular e-shoppers consider that online shopping allows to save money, and almost 70% consider price as the most important driver when buying. They are looking for big discount events and real good deals. But again, the perception of online shopping is decreasing on the money-saving dimension.

61%

-8 ▼

63%

of regular e-shoppers consider that shopping online saves money – %T2B

68%

-9 ▼

61%

“Price is the most important factor in my purchasing decisions” – %T2B

67%

53%

“I look forward to big discount events, online or offline, (Black Friday, seasonal sales...)” – %T2B

80%

-6 ▼

69%

“I am always on the lookout for a really good deal” – %T2B

G11 – Here are some statements about shopping. To what extent do you personally agree or disagree with the following statements?)

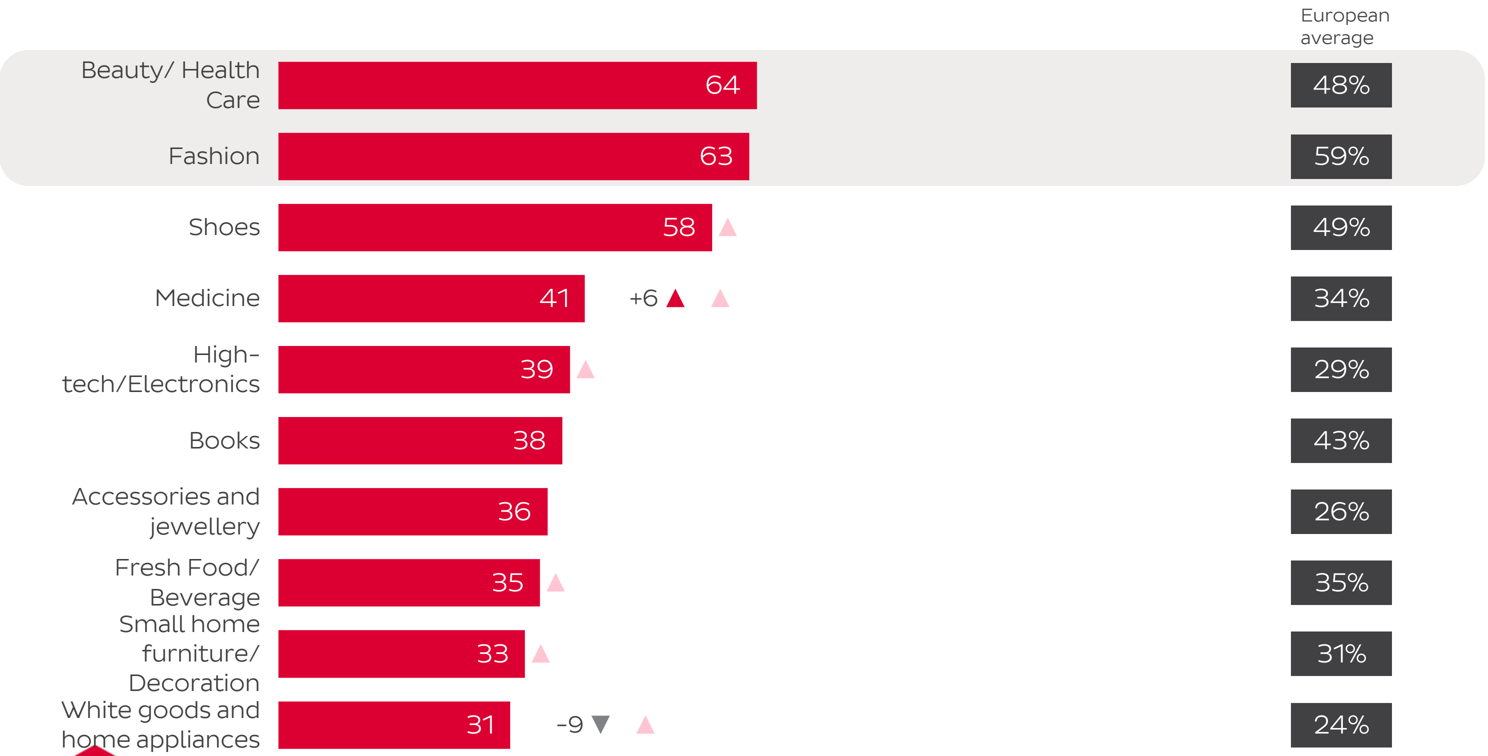
xx% European average

Regular e-shoppers

Regular e-shoppers popular categories

Beauty care and fashion remain the top categories bought, as in Europe, followed by shoes, which benefited from the online boom during the pandemic. Medicine is bought online by even more regular e-shoppers this year.

% – TOP 10 types of goods purchased online since January



Biggest evolutions vs. 2021 (apart from top 10)

14%	-12 ▼	DVD/ CD/ Video Games
29%	-8 ▼	Leisure
16%	-6 ▼	Heavy home furniture

6,4 ▲

categories bought on average

6,0

European average

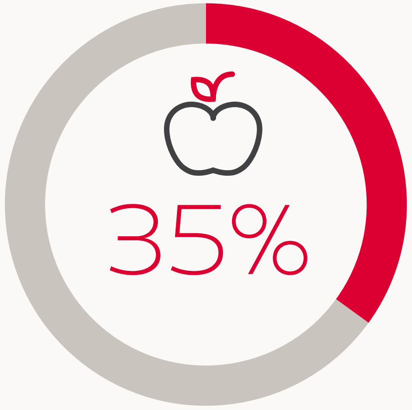
SC2. Since January, what types of goods have you ordered online?

▲▼ Significant increase/ decrease between 2021 and 2019

Regular e-shoppers

Focus on fresh food & beverage

There are as many online buyers of fresh food & beverage this year as last year, mostly buying ready-to-eat products as well as other types of food.

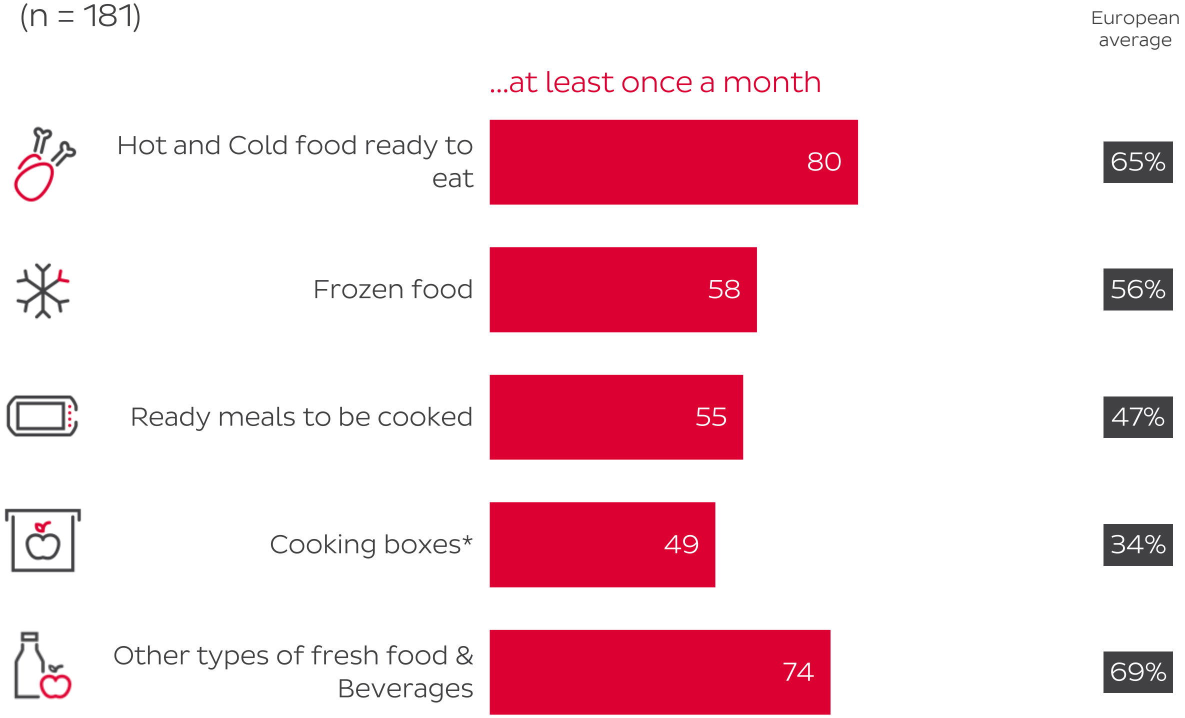


...of regular e-shoppers have **ordered online fresh food and beverages** since January

35% European average

Types of fresh food and beverages purchased online...

% – (n = 181)



* (fresh ingredients to be cooked delivered with the recipe)

SC2 – Since January, what types of goods have you ordered online?
A1bis. You mentioned that you ordered online fresh food and beverages. More precisely, how often do you order online?

Regular e-shoppers – fresh food & beverage e-buyers

Fresh food & beverage e-buyers profile

Female

50%

European average
56%

Income

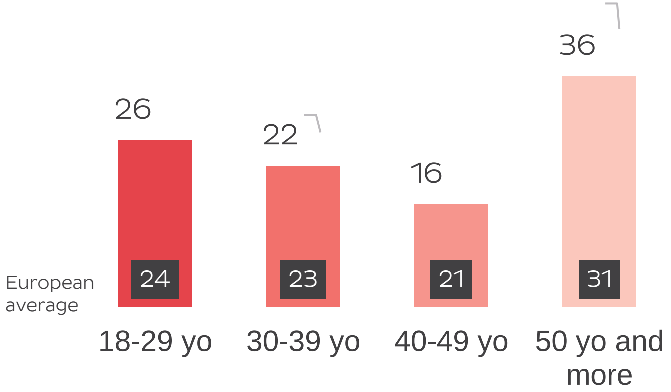
41%
Upper

European average
48%

Age

41,7 y.o

European average
41,9



Marital status

		European average
25%	Single	29%
55%	Married	44%
13%	Cohabitation	17%
5%	Divorced	7%

City size

92%**

Urban

88%

+10▲

Have started purchasing online ...

RS0; RS1; RS2; RS2RECAP; RSX; S2; C1; A2

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

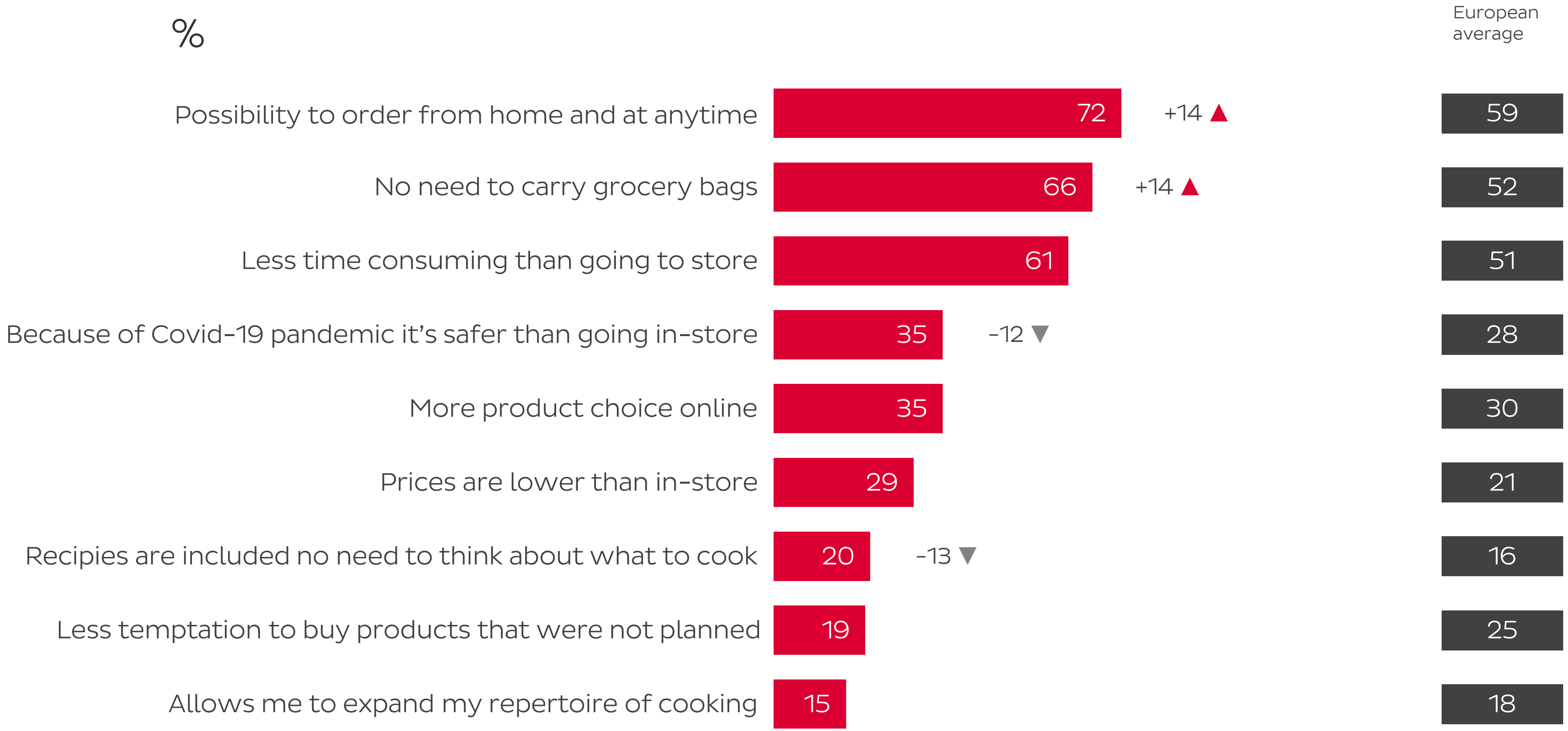
Regular e-shoppers - fresh food & beverage e-buyers

Levers to order fresh food online

Buying from home at any time and not having to carry the bags are the top and increasingly important reasons why e-shoppers buy fresh food online, while Covid-19 is unsurprisingly is less important than in the past.

Reasons to purchase fresh foods online

%



A1ter. You mentioned you purchased online fresh food and beverages.
Thinking about these purchases, and excluding any purchase of food ready to eat, what are all the reasons why you ordered fresh food online ?

xx% European average

Regular e-shoppers - fresh food & beverage e-buyers

Online purchase habits & attitudes

Online fresh food buyers are heavier e-buyers compared to the average regular e-shoppers. Compared to regular e-shoppers more consider e-shopping is a way to save time, and it is possible to buy all products online.

8,7 ✚ (6,4)

Different types of goods bought since January on average

European average **8,0**

Top 7 Categories

			European average
1. Fresh Food/ Beverage	100%	✚ (35)	100
2. Fashion	67%		63
3. Beauty/ Health Care	67%		56
4. Shoes	62%		56
5. Medicine	55%	✚ (41) ▲ +11	38
6. High-tech/Electronics	51%	✚ (39)	37
7. Books	51%	✚ (38)	48

83 -6

Annual number of purchases

European average **74**

/!\ No significance test on median

21,2%

Average share of online shopping

(on total shopping – average of all categories)

European average **20,8%**

Attitudes specificities vs. regular e-shoppers

(biggest significant gaps vs. regular e-shoppers on % agree & strongly agree)

Positive

			European average
88%	Shopping online allows me to save time	✚ (79)	82
75%	I can shop for nearly 100% of the products/services I need online	✚ (63)	63

Negative

xx% European average ✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

Regular e-shoppers - fresh food & beverage e-buyers

Delivery places & preferences

Online fresh food buyers tend to use the same delivery places as regular e-shoppers, home delivery being the most popular. They also share the same delivery preferences, such as being informed and able to select the one-hour window of the delivery and receiving real-time information on delivery.

Top 5 - Usual delivery places

	At home	To a post office	To a parcel locker station	At work	To a parcel shop
	84%	29%	29%	18%	15%
European average	81	16	20	11	21

2,1

Delivery places on average

European average 2,0

Top 5 - Delivery preferences (importance index – average interest = 100)

/!\ No significance test on index

	Know the exact one-hour window of the delivery	Real time info on delivery	Select day and one-hour window delivery in advance	Advanced notifications (within a one-hour window)	Several delivery options
	159 >	146 >	145 >	139 >	120
RANKING AMONG REGULAR E-SHOPPERS	#1	#2	#4	#3	#5

78%

-11 ▼

European average 71

…consider it important to know the delivery company

xx% European average ✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

Regular e-shoppers - fresh food & beverage e-buyers

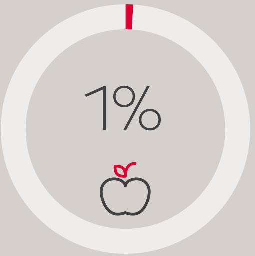
Drivers of future purchases of fresh foods (1/3)

The main reasons that will make them buy again are the width of product choice offered, the fact that products are packaged in a proper way and that delivery slots are available upfront.

% - Expectations regarding **the offer/ website**

/!\ No evolution displayed (new question)

Large choice of products	56	52%
Products packaged in a proper way depending on the type	49	40%
Availability of delivery slots indicated before filling my basket	47	41%
Expiration dates clearly indicated for each product	43	34%
Offer of products from small local producers	41	28%
Guarantee of the origin and traceability of the products sold	37	26%
Explanations on how freshness and quality are guaranteed	32	29%
Carrier known for its ability to deliver fresh products	32	29%
Offer of organic products	29	25%
Sustainable packaging	28	29%
The website has anti-waste initiatives	26	25%



"None of these would be drivers"

6%

4,2 expectations on average

3,6

A8. Which of the following would make you more likely to purchase again fresh food and beverages (excluding hot and cold food ready to eat) on a specific website?

xx% European average

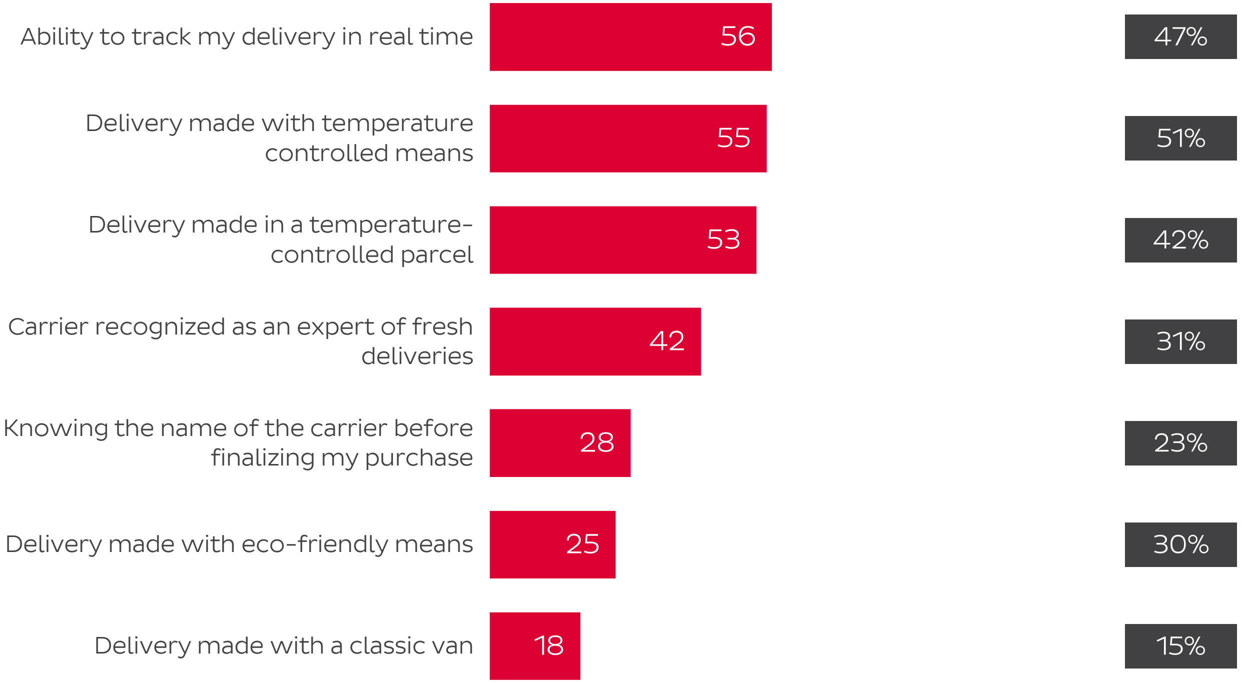
Regular e-shoppers - fresh food & beverage e-buyers

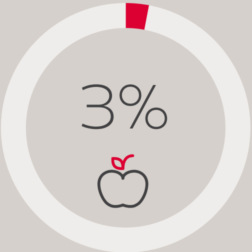
Drivers of future purchases of fresh foods (2/3)

They also expect to be able to track their delivery in real-time, to be delivered with temperature controlled-means and in temperature-controlled parcel.

% - Expectations regarding **delivery conditions**

/!\ No evolution displayed (new question)





"None of these would be drivers"

8%

2,8 expectations on average

2,4

A7. Knowing which of the following would make you more likely to purchase again fresh food and beverages (excluding hot and cold food ready to eat) on a specific website?

xx% European average

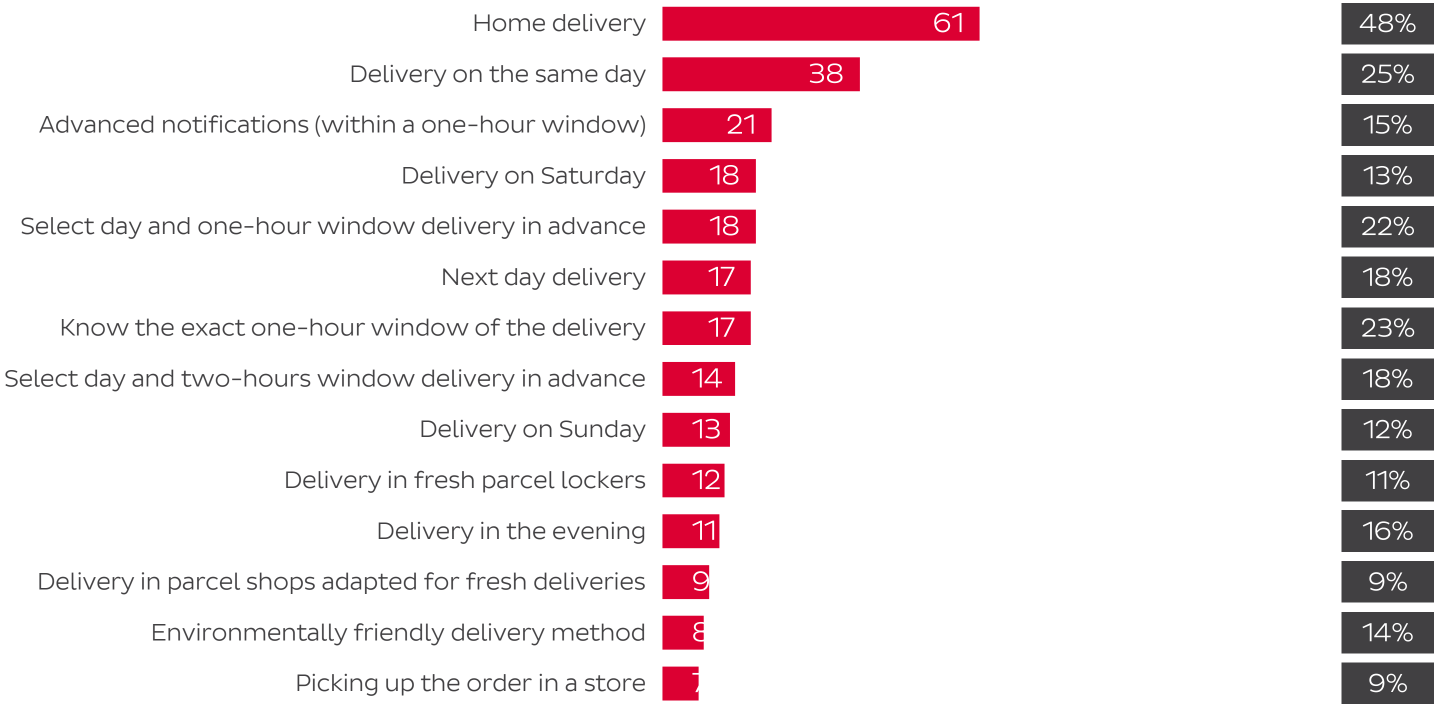
Regular e-shoppers – fresh food & beverage e-buyers

Drivers of future purchases of fresh foods (3/3)

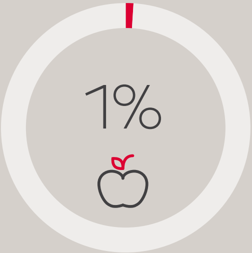
Their preferred delivery option remains home and same-day delivery.

% – Expectations regarding **delivery options**

/!\ No evolution displayed (new question)



Home delivery	61	48%
Delivery on the same day	38	25%
Advanced notifications (within a one-hour window)	21	15%
Delivery on Saturday	18	13%
Select day and one-hour window delivery in advance	18	22%
Next day delivery	17	18%
Know the exact one-hour window of the delivery	17	23%
Select day and two-hours window delivery in advance	14	18%
Delivery on Sunday	13	12%
Delivery in fresh parcel lockers	12	11%
Delivery in the evening	11	16%
Delivery in parcel shops adapted for fresh deliveries	9	9%
Environmentally friendly delivery method	8	14%
Picking up the order in a store	7	9%



"None of these would be drivers"

3%

2,7 expectations on average

2,5

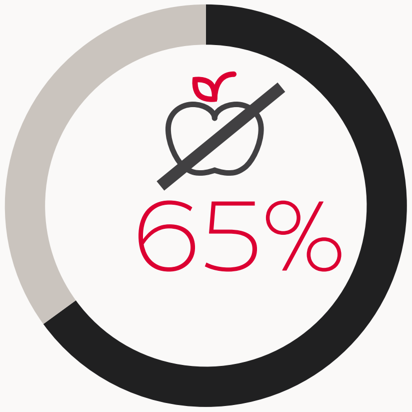
A9. Which of the following delivery options would make you more likely to purchase again fresh food and beverages (excluding hot and cold food ready to eat) on a specific website?

xx% European average

Regular e-shoppers – NOT fresh food & beverage e-buyers

Barriers to order fresh foods online

The regular e-shoppers who don't purchase fresh food online have doubts about the product quality, find the choice of products larger in store and fear safety risks.



…did not order any fresh food and beverage online since January

65% European average

Reasons not to purchase fresh foods online

% (n = 336)

SC2. Since January, what types of goods have you ordered online?
A1cinq. You mentioned you haven't bought any fresh food and beverages online, why ?

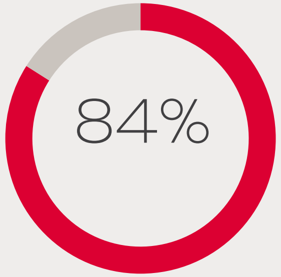
xx% European average

Regular e-shoppers

Familiarity and loyalty

Regular e-shoppers mainly buy on websites they know, and are loyal to the websites they buy from. However, less of them are subscribed to retailer loyalty program and they do not intend to do so in the future.

Familiarity with the website

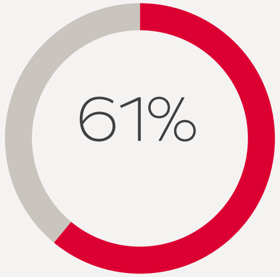


Already bought something on the website
86%

11% — 11% — **Never bought** something on the website before last order but **already knew it**

4% — 3% — **Never heard about the website** before last order

Loyalty to websites

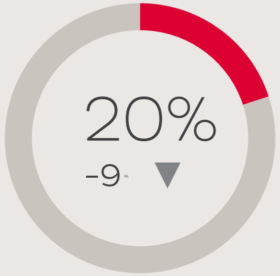


Loyal to certain websites but like to change sometimes
64%

20% — 23% — **Always** shop on the **same websites**

19% — 12% — **Always go on different websites** to shop

Loyalty Program subscriptions



Yes subscribed to retailer loyalty program
35%

29% — 14% — **No, but intend to do so** in the next few months

44% — 44% — **No, and do not intend to do so** in the next few months

7% — 7% — I don't know / I can't remember

European average
xx%

D5 – Had you already bought something on this website before that order?
C2 – Thinking of how you usually select a website, which of the following would best describe your online shopping habit?
D17 – Do you currently subscribe to an online retailer for a monthly / yearly fee in order to get (some) deliveries for free/cheaper/quicker (loyalty scheme)?

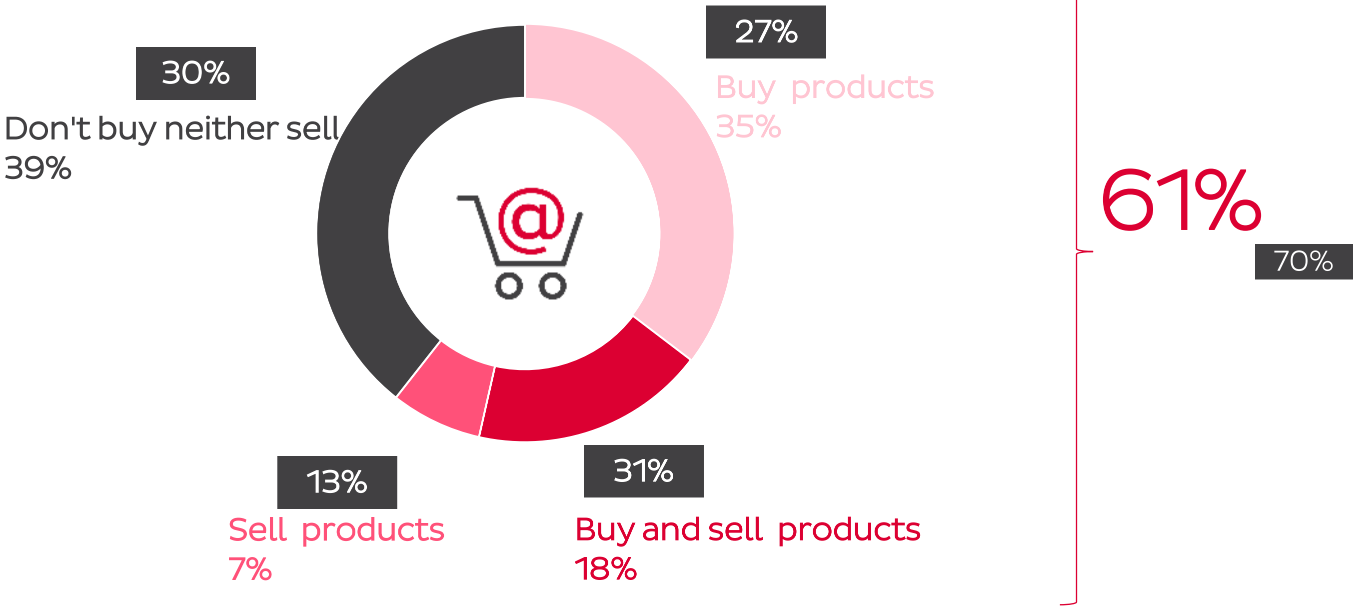
Regular e-shoppers

Online shopping between individuals

A bit more than 60% of regular e-shoppers buy or sell on CtoC platforms, a bit less than in Europe overall.

% - Buying and selling on second-hand platforms

/!\ No evolution displayed (new question)



buy or sell products

xx% European average

M10. Do you buy and/or sell on second-hand platforms (online platforms where individuals, mostly private but sometimes running small businesses, can buy and sell their own goods, often second-hand; e.g. Depop, Ebay etc.)?

Buying products on CtoC platforms (1/2)

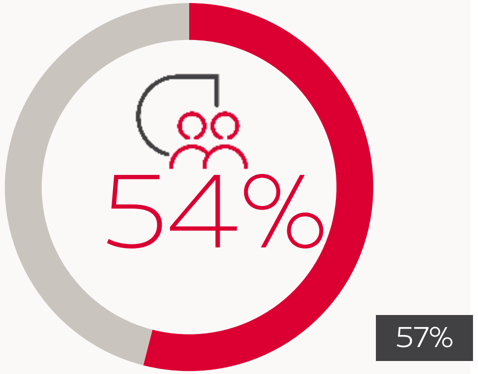
More than half of them buy from individuals, and almost one third claim that they buy more on these platforms than before. Yet, their frequency of buying on CtoC platforms is much lower than in Europe overall.

29%

34%

(% agree & strongly agree)

"I buy **more** second-hand products these days"



...**buy** products on CtoC platforms

Frequency of purchase (n = 278)

30%	at least once a month	44%
28%	once every 2 or 3 months	28%
42%	less often	28%
8,1	times per year on average	12,2

/!\ No evolution displayed (new questions)

M12. How often do you buy on second-hand platforms (e.g. Depop, Ebay etc.)?

xx% European average

Regular e-shoppers

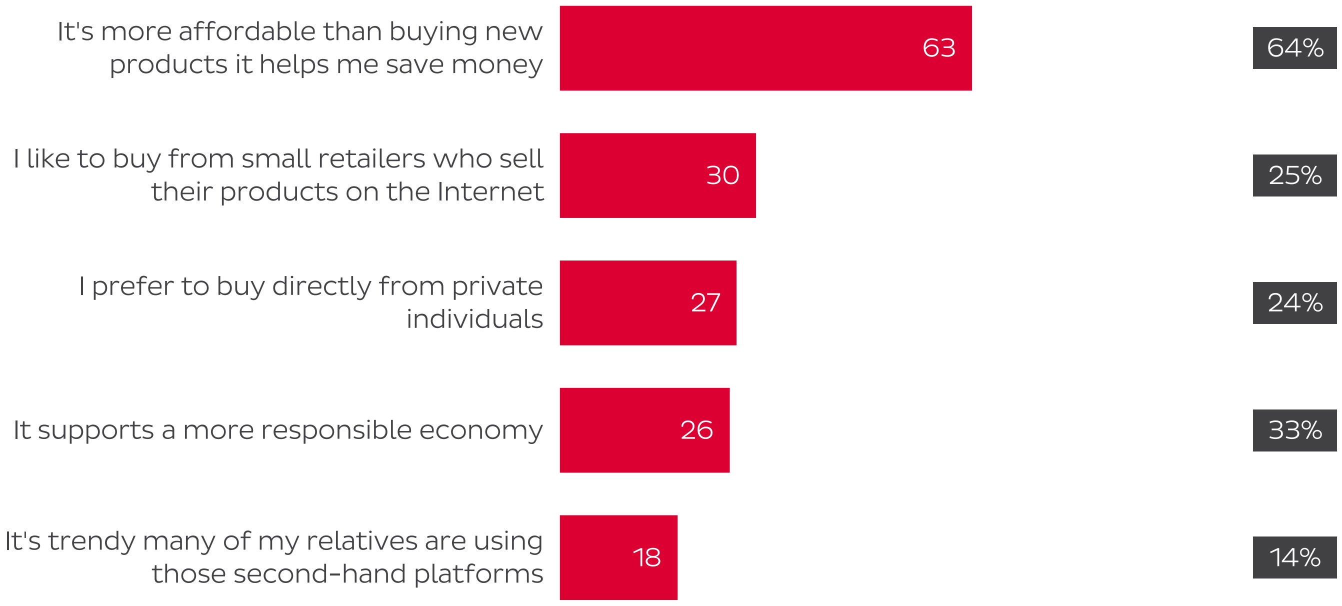
Buying products on CtoC platforms (2/2)

E-shoppers buy from individuals first and foremost as it is more affordable than buying new items. They also like to support local retailers who are present online.

Reasons of purchase – %

/!\ No evolution displayed (new question)

(n = 278)



Choice of delivery

Carrier proposed by the website	50%	47%
Hand delivery	31%	34%
Carrier chosen by the seller	46%	50%

M11. When you buy on second-hand platforms (e.g. Depop, Ebay etc.), how do you usually choose to be delivered?
M13. And why do you buy on second-hand platforms (e.g. Depop, Ebay etc.)?

xx% European average

Regular e-shoppers

Selling products on CtoC platforms

Much less romanian e-shoppers buy from individuals than their European peers. Those who buy, mainly do so because they have good items that they don’t use, they want to free up space, as well as to earn money.

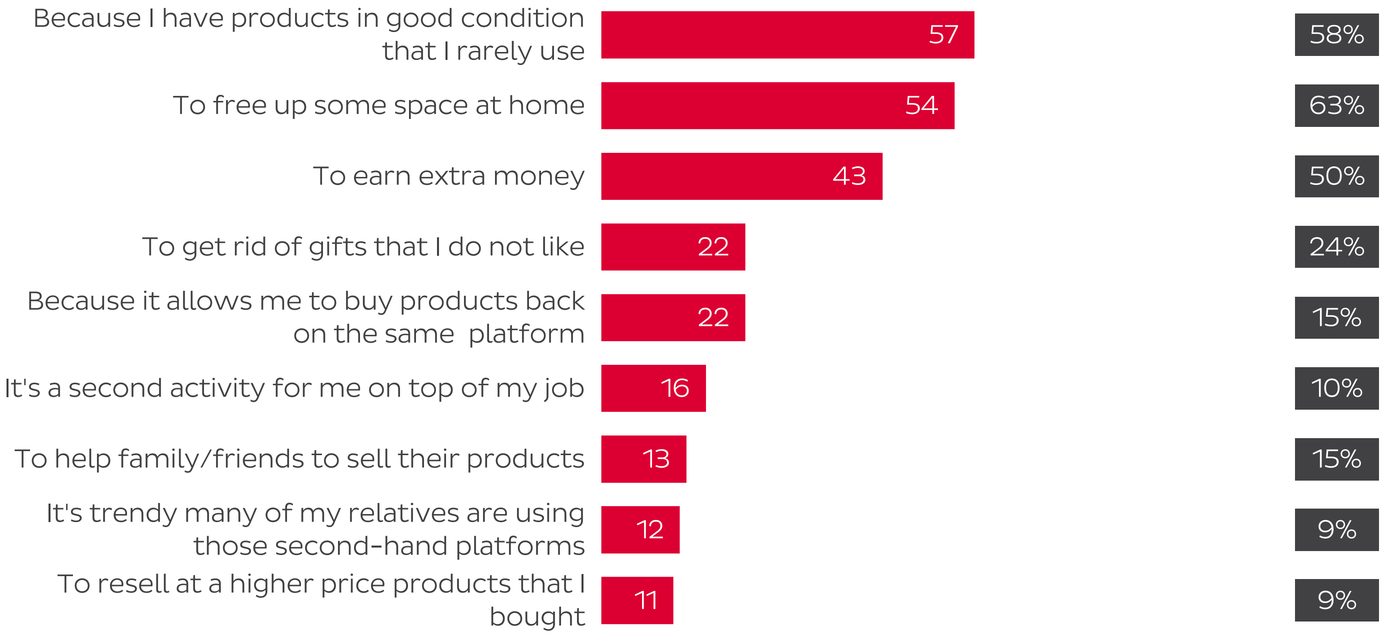
...sell products on CtoC platforms

44%

Reasons of selling - %

/!\ No evolution displayed (new question)

(n = 133)



M15. Why do you sell on second-hand platforms (e.g. Depop, Ebay etc.)?

xx% European average

Regular e-shoppers

Shopping through social media

(among social media users)

Almost all regular e-shoppers use social media for shopping purpose, either to get information and inspiration, but also to buy based on relatives' recommendations, banner ads or brand content.

Shopping activities done on social networks from time to time -%

/!\ No evolution displayed (new question) (Among social media users (n = 511)

90% 70%

...use social media for at least one shopping purpose

66% 48%

...shop directly from social media

2,6 1,7

activities on average

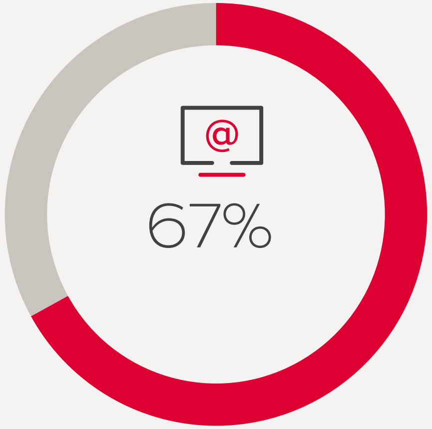
C2abis. Thinking about the social networks you use, for which of the following do you use them, even if only once in a while?

xx% European average

Regular e-shoppers

Foreign vs. local

2 of 3 regular e-shoppers buy from foreign websites, mainly because they are looking for better deals and secondly to find products or brands not available in Romania.



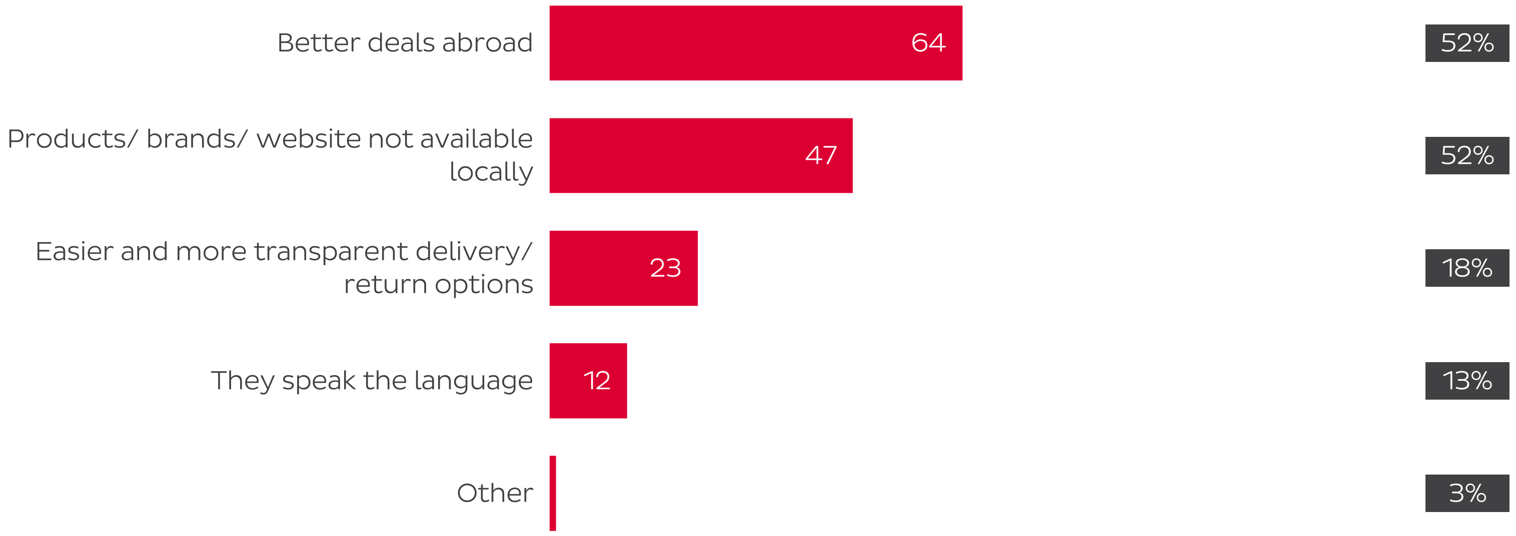
European average

57%

of regular e-shoppers have already **bought online from foreign websites**

Reasons to make purchases from foreign websites

% (n = 348)



C6 – Have you ever bought online from foreign websites? Rq: We define a foreign website as a website having a different domain name than your local one and/or a website being in a foreign language.
C8 – What were the reasons for you to make purchases from foreign websites?
Base: People that have already bought online from foreign websites
Rq: Several answers allowed

XX% European average

Regular e-shoppers

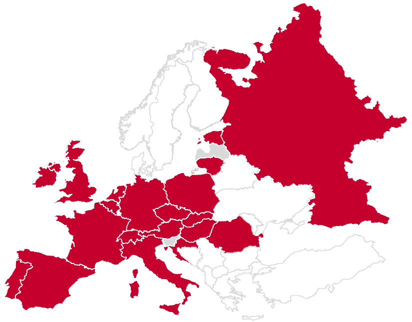
Purchases from foreign countries

Preferred country is China when shopping abroad, followed by Germany and the US.

Top 3 most common foreign countries for buying online

			European average
1	China	54%	51%
2	Germany	34%	29%
3	USA	29%	32%

66% — 66% in other parts of the world



76% — 75% in Europe

16% — 44% from neighbouring countries

C7 – From which countries? Base: People that have already bought online from foreign websites (n = 348)
Rq: We define a foreign website as a website having a different domain name than your local one and/or a website being in a foreign language.

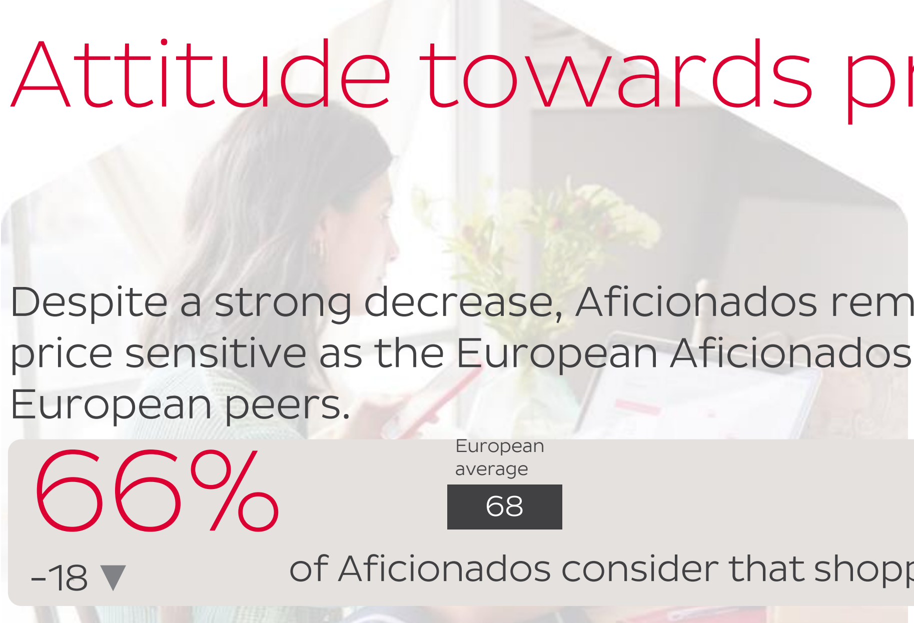
xx% European average

Zoom on the Aficionados

Price increases started to affect e-shoppers' habits, so the Aficionados reduced the number of categories bought online.

Zoom on the Aficionados

Attitude towards price



Despite a strong decrease, Aficionados remain convinced that shopping online saves money and they are as price sensitive as the European Aficionados. They seek more good deals and big discount events than their European peers.

66%

European average

68

-18 ▼

of Aficionados consider that shopping online saves money – %T2B

66%

European average

62

-20▼

“Price is the most important factor in my purchasing decisions” – %T2B

76% ✚(67)

European average

61

-15 ▼

“I look forward to big discount events, online or offline, (Black Friday, seasonal sales…)” – %T2B

81%

European average

74

-13 ▼

“I am always on the lookout for a really good deal” – %T2B

European average

xx%

G11 – Here are some statements about shopping. To what extent do you personally agree or disagree with the following statements?)

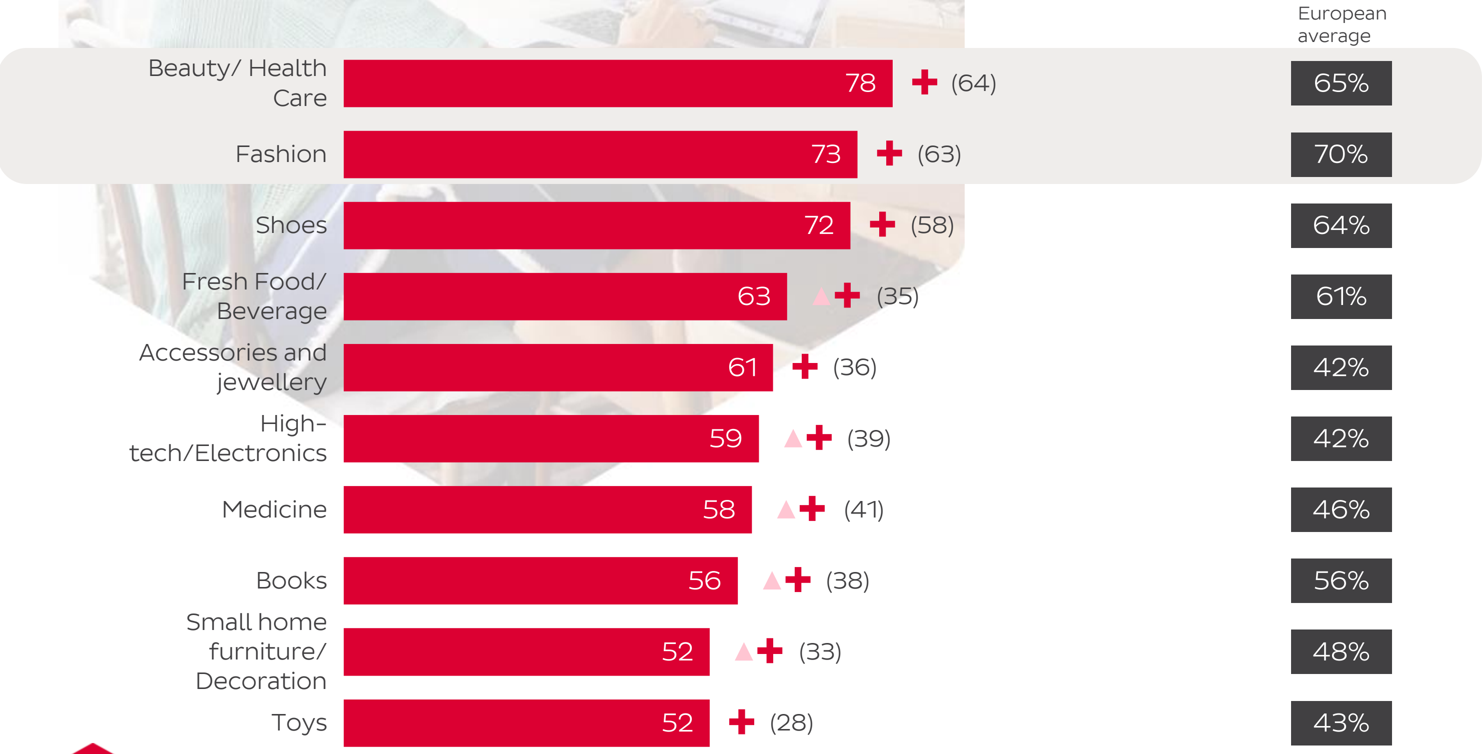
✚ ━ vs. regular e-shoppers at 95% confidence rate

Zoom on the Aficionados

Aficionados popular categories

The Aficionados increased the number of categories bought online last year but the trend has reversed this year, yet they still buy one category more online than their European counterparts.

% – TOP 10 types of goods purchased online since January



SC2. Since January, what types of goods have you ordered online?

Biggest evolutions vs. 2021 (apart from top 10)

26%	-33 ▼	DVD/ CD/ Video Games	✚	(14)
30%	-18 ▼	Heavy home furniture	✚	(16)
50%	-17 ▼	White goods and home appliances	✚	(31)

9,7 ✚(6,4) -1 ▼▲

European average 8,8

categories bought on average

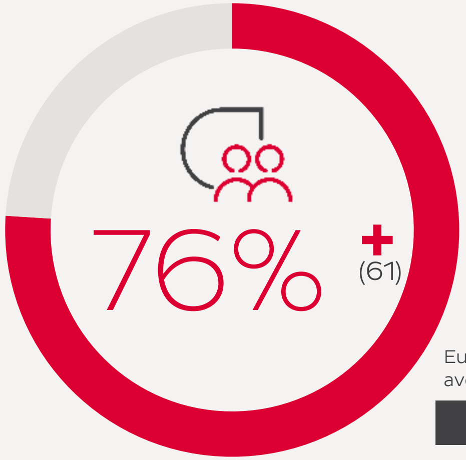
▲▼ Significant increase/ decrease between 2021 and 2019

✚ ▬ vs. regular e-shoppers at 95% confidence rate

Zoom on the Aficionados

Online shopping between individuals

Aficionados use CtoC platforms more frequently than regular e-shoppers and they buy more often than them, though the levels are still below the European average.



… buy or sell products on CtoC platforms

66% + (54)

64

buy products

Frequency of purchase

47%	+	(30,0)	At least once a month	58,0
28%			Once every 2 or 3 months	24,0
25%	–	(42,0)	Less often	18,0
12,4	+	(8,1)	times per year on average	16,7

32%

47

sell products

38%

43

“I buy more second-hand products these days % – T2B”

xx% European average

+ – vs. regular e-shoppers at 95% confidence rate

M10. Do you buy and/or sell on second-hand platforms (online platforms where individuals, mostly private but sometimes running small businesses, can buy and sell their own goods, often second-hand; e.g. Depop, Ebay etc.)?
M12. How often do you buy on second-hand platforms (e.g. Depop, Ebay etc.)?

/!\ No evolution displayed (new question)

Zoom on the Aficionados

Reasons for using CtoC platforms

Saving money and space are their main reasons to buy and sell on those platforms.

Reasons for **buying**

64%	It's more affordable than buying new products it helps me save money	60
34%	I like to buy from small retailers who sell their products on the Internet	33
27%	It supports a more responsible economy	36
25%	I prefer to buy directly from private individuals	26
21%	It's trendy many of my relatives are using those second-hand platforms	20

Reasons for **selling**

67%	Because I have products in good condition that I rarely use	53
55%	To free up some space at home	57
44%	To earn extra money	48
29%	Because it allows me to buy products back on the same platform	20
26%	To get rid of gifts that I do not like	27
22%	It's a second activity for me on top of my job	16
21%	To help family/friends to sell their products	22
16%	It's trendy many of my relatives are using those second-hand platforms	15
9%	To resell at a higher price products that I bought	15

M13. And why do you buy on second-hand platforms (e.g. Depop, Ebay etc.)?
M15. Why do you sell on second-hand platforms (e.g. Depop, Ebay etc.)?

xx% European average

➕ ➖ vs. regular e-shoppers at 95% confidence rate

/!\ No evolution displayed (new question)

Zoom on the Aficionados

Shopping through social media

(among social media users)

Almost all Aficionados, who use social media, use these platforms for shopping purposes. Main reason is to collect inspiration and information, as well as to shop from social media based on banners ad, their relatives' recommendations and brand pages.

94%

80

of social media users use them for at least one shopping purpose

82% + (66)

62

...shop directly from social media

Shopping activities done from time to time

Top 5

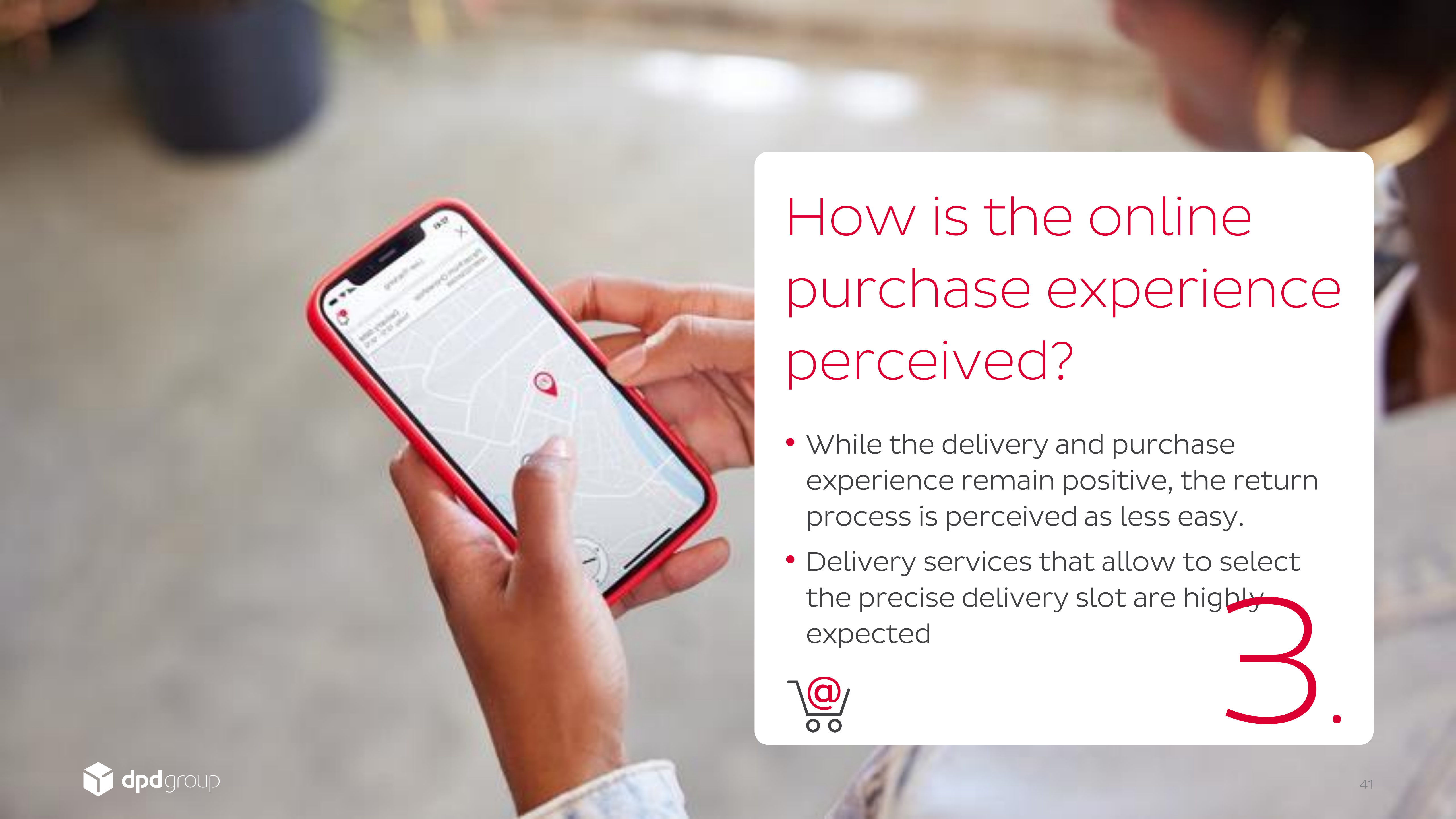
44%	I use them for shopping inspiration		34
39%	I use them for shopping 'information gathering'		29
38%	I shop from banner ads of items I have previously looked at	+ (28)	18
36%	I shop from friends' and family's recommendations		26
34%	I shop from content from brands I follow	+ (23)	24

xx% European average

+ − vs. regular e-shoppers at 95% confidence rate

C2abis. Thinking about the social networks you use, for which of the following do you use them, even if only once in a while?

/!\ No evolution displayed (new question)



How is the online purchase experience perceived?

- While the delivery and purchase experience remain positive, the return process is perceived as less easy.
- Delivery services that allow to select the precise delivery slot are highly expected

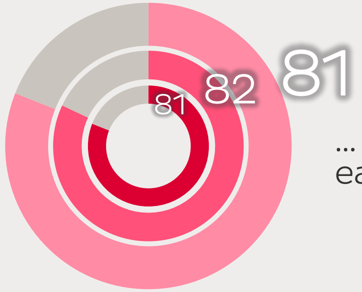
3.

Regular e-shoppers

Effort and satisfaction vs. online purchase

The last purchase experience remains very well perceived, as it is for the delivery and purchase effort. Yet, the return process is perceived as less easy than in the past.

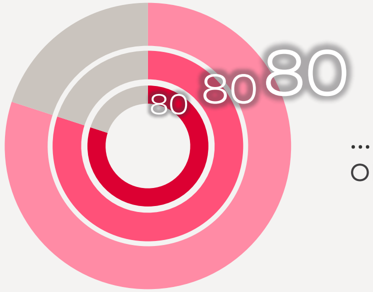
Delivery effort



... found the delivery easy/ effortless

73%

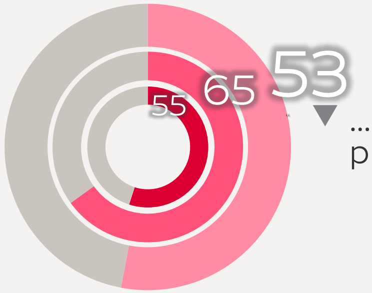
Last online purchase effort



... consider their last online purchase as easy

71%

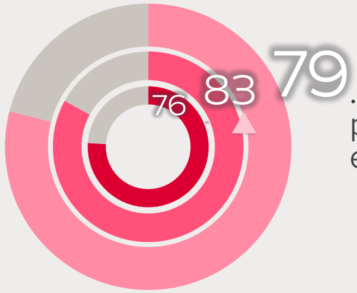
Return effort



... found the return process easy/ effortless

55%

Rating of last online purchase experience



... consider their last online purchase experience as excellent or very good

78%

% ■ 2019 ■ 2021 ■ 2022

▲▼ Significant increase/ decrease between 2021 and 2019

xx% European average

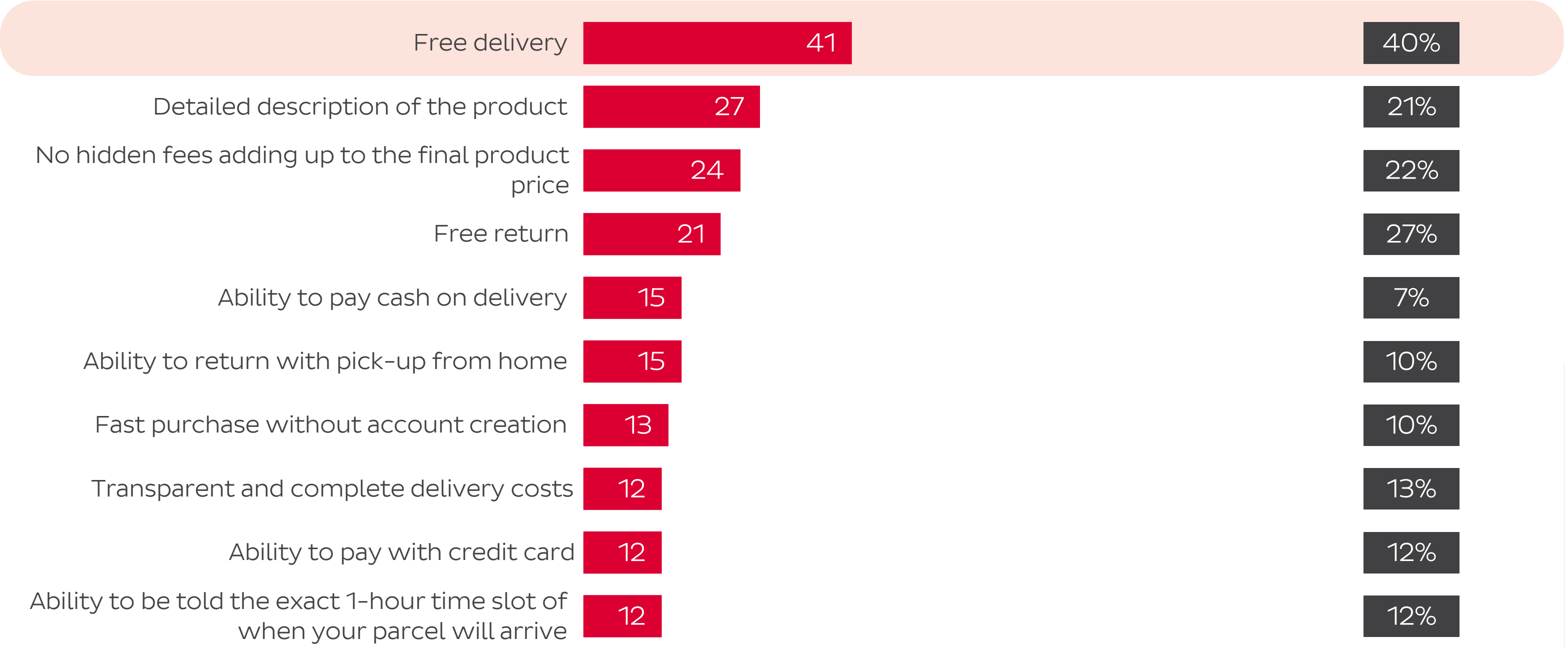
Regular e-shoppers

Online purchase drivers

As in other European countries, free delivery represents the #1 driver of online purchases, followed by detailed description of the product and no hidden fees.

Top 10 important criteria when buying online % – (out of 26 criteria)

Items ranked as 1st, 2nd or 3rd most important



Biggest evolutions vs. 2021 (apart from TOP10)

5% -5 ▼ Digital wallet payment method

B1a – Among the selected criteria which is the most important for you when buying online? And the second, the third?
Rq: TOP 3 ranking on all answers given

xx% European average

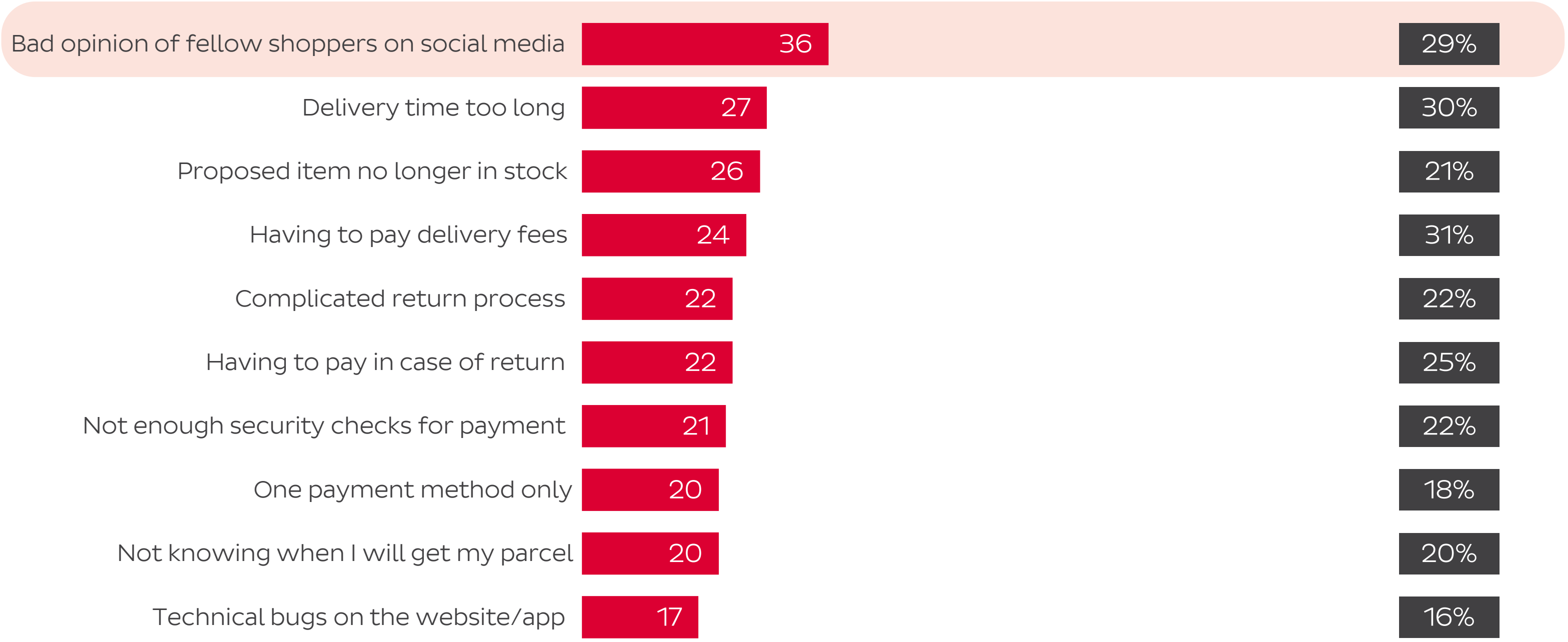
Regular e-shoppers

Dissuasive effects

While bad reputation on social media remains the main barrier to buying online, followed by long delivery times.

Top 10 features that prevent the most from buying online % – (out of 17 criteria)

Items ranked as 1st, 2nd or 3rd most important



Biggest evolutions vs. 2021 (apart from TOP10)

B2a – Among the selected criteria which one prevents you the most from buying online? And the second, the third?
Rq: TOP 3 ranking on all answers given

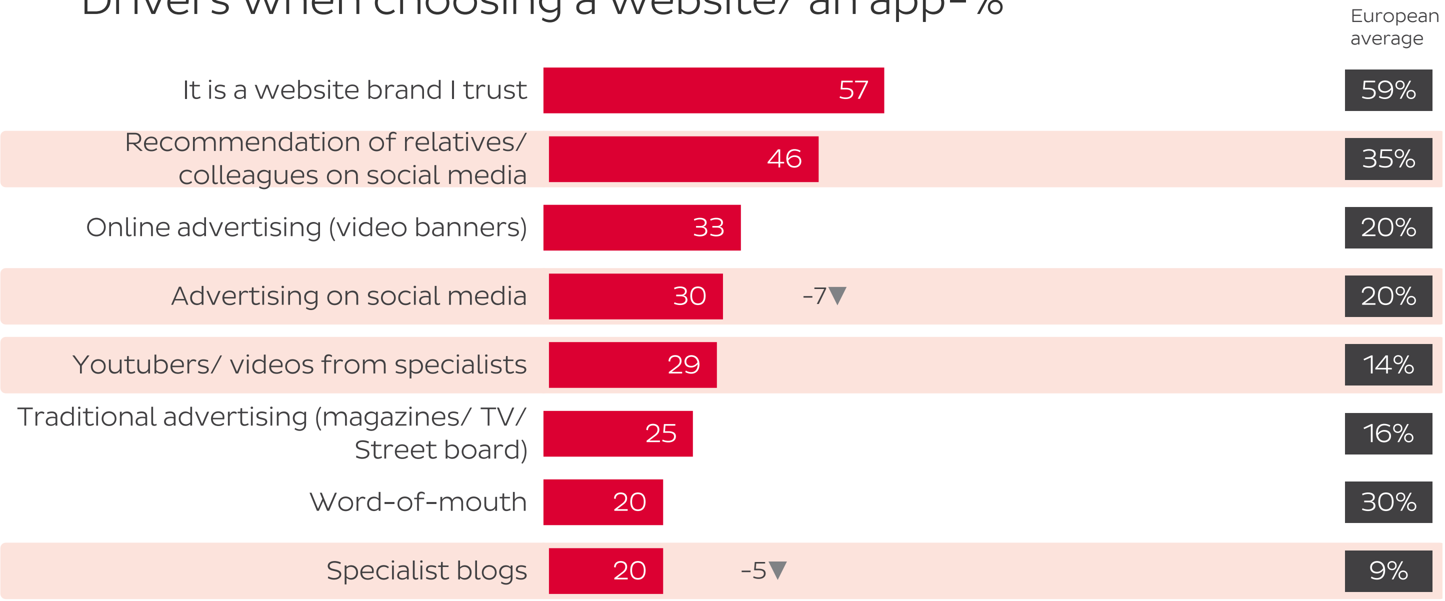
xx% European average

Regular e-shoppers

Reviews and recommendations

Opinion on social media is even more important when considering that most Romanian regular e-shoppers publish feedback after purchase. Social media and influencers play an important role when choosing the retailer / app they buy from.

Drivers when choosing a website/ an app-%



2,6

2,1

Average number of influencers

80%

69%

Share or publish a feedback after purchasing

73%

-6 ▼

56%

NET Social Media and influencers

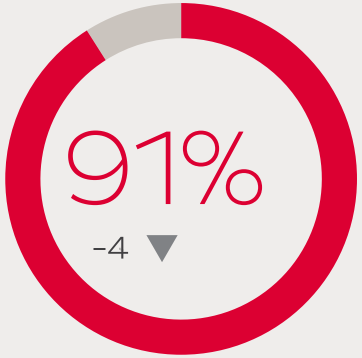
C18 – When shopping online, how do you choose a website and/or an app?
Rq: Several answers allowed

xx% European average

Regular e-shoppers

Importance of delivery services

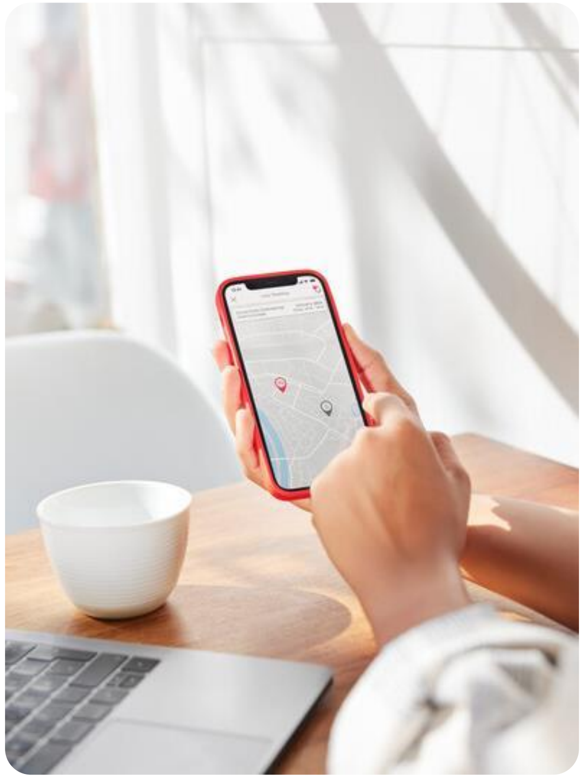
In Romania, even more than in Europe, knowing and being able to select the day and 1-hour of the delivery is expected by almost all regular e-shoppers, despite a decrease observed this year.

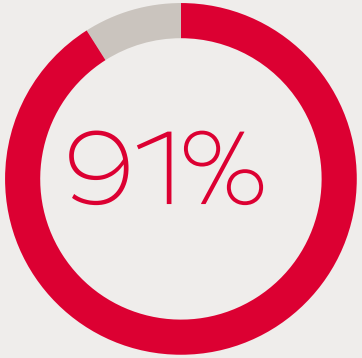


69%

Consider that **knowing the exact 1-hour window/timeslot of their delivery** would make them more likely to purchase from a website/retailer/app

(% agree & strongly agree)





72%

Consider that the ability to **select the day and exact 1-hour window/timeslot in advance of their delivery** would make them more likely to purchase from a website/retailer/app

(% agree & strongly agree)

C17. Would knowing the exact 1-hour window/timeslot of your delivery make you more likely to purchase from a website/retailer/app?
C17bis. Would the ability to select the day and exact 1-hour window/timeslot in advance of your delivery make you more likely to purchase from a website/retailer/app?

xx% European average

Regular e-shoppers

Delivery preferences

At home remains the 1st delivery places used by far, and used by even more regular e-shoppers in 2022. Then, Romanian regular e-shoppers get their parcels delivered to a post office or a parcel locker station.

Usual delivery places-%

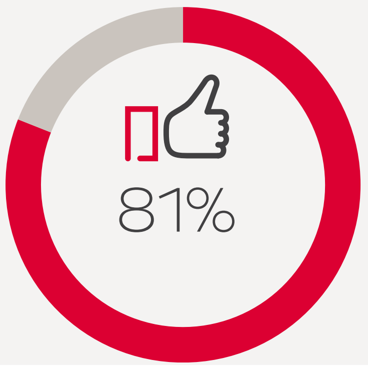
1,9 **1,8** Delivery places on average

35% **39%**

Are delivered out of home (parcel locker, parcel shop or retailer store)

51% **48%**

Usually use more than one delivery place



… found delivery easy/effortless

73%

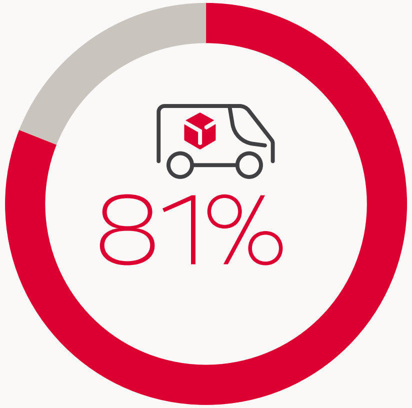
D14. How much effort did you have to put into the delivery (e.g. tracking, picking up, receiving, etc…) of your last online purchase?
C14. Where do you usually have your parcels delivered to?

xx% European average

Regular e-shoppers

Delivery company

And knowing the carrier brand at check-out is important to more than 80% of them, and this is mainly driven by their need for reassurance.

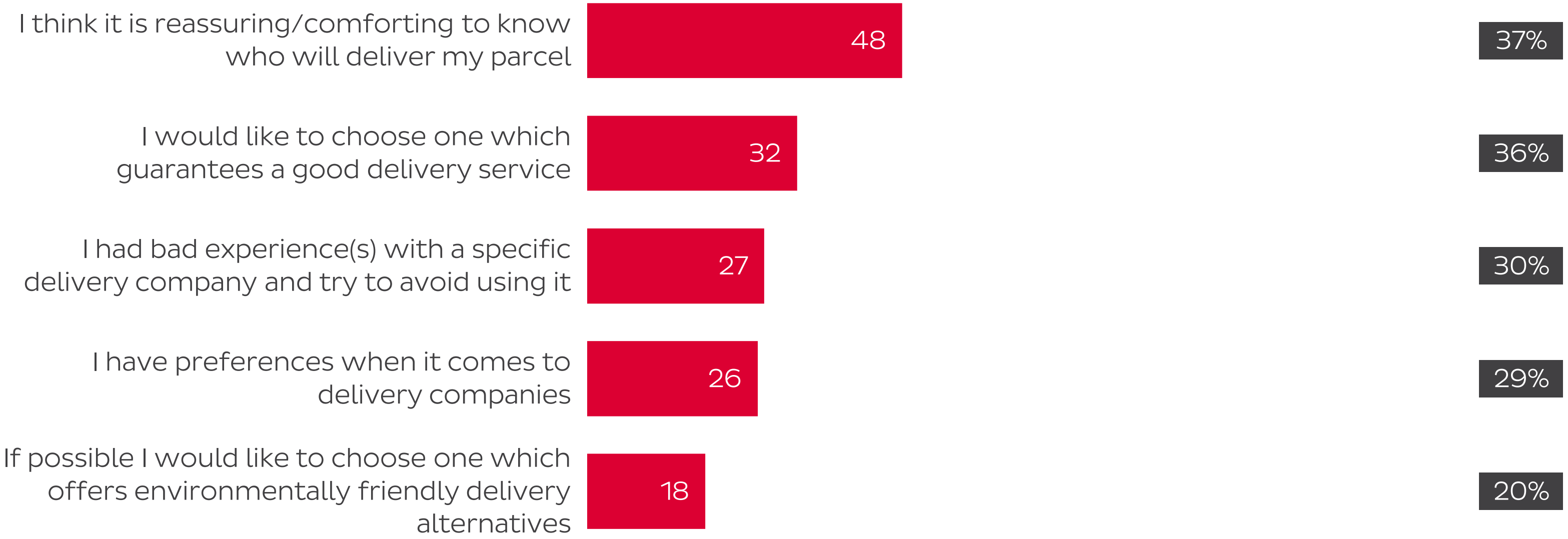


...consider it **important** to know the delivery company

71%

Reasons of importance to know the delivery company

% (n = 420)



I think it is reassuring/comforting to know who will deliver my parcel	48	37%
I would like to choose one which guarantees a good delivery service	32	36%
I had bad experience(s) with a specific delivery company and try to avoid using it	27	30%
I have preferences when it comes to delivery companies	26	29%
If possible I would like to choose one which offers environmentally friendly delivery alternatives	18	20%

xx% European average

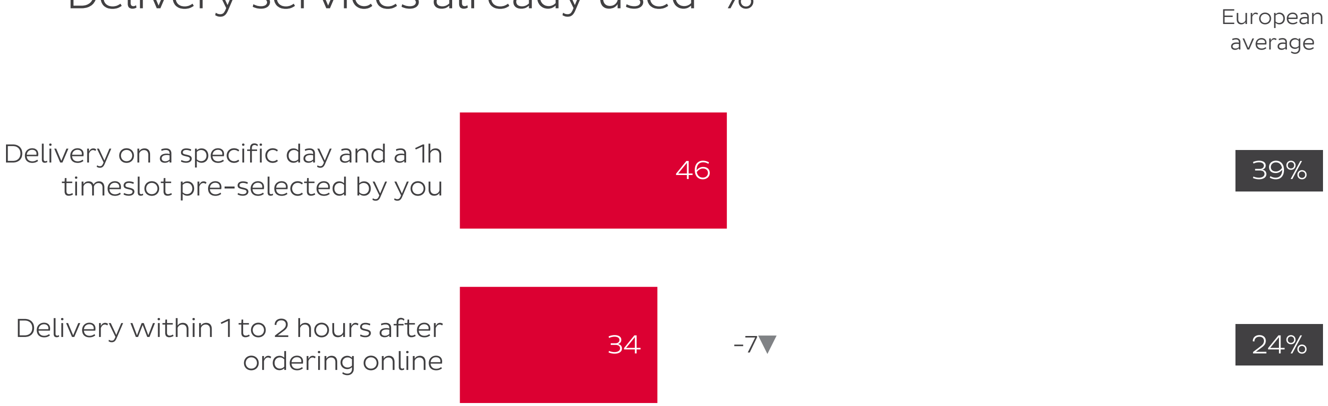
D15. In your opinion, is it important to know who the delivery company will be, before finalizing the purchase?
D16. You said that for you it is important to know who the delivery company will be, before finalizing your purchase. Which of the following reasons apply to you? Base :think that it is important to know the delivery company before finalizing the purchase
Rq: several answers allowed

Regular e-shoppers

Use of delivery services

In line with their expectations, a high share of regular e-shoppers have already used delivery services that allow to be delivered on a specific day and 1-hour time slot or within 1 to 2 hours. And almost all of them were notified via email or SMS.

Delivery services already used-%



G1 – Have you already used the following delivery services?
D10. On the day of delivery, did you receive an email or SMS notification to indicate you the approximate time your parcel will arrive?

xx% European average

Regular e-shoppers

Top delivery preferences

Unsurprisingly, their #1 delivery preference consists in knowing the exact one-hour time slot of the delivery, real time information, advanced notifications and having the ability to select in advance the precise window of the delivery.

Delivery preferences (importance index – average interest = 100)

	157 >	148 >	140 >	139 >	128 >	110 >	109
	131	145	121	139	138	123	87
	Know the exact one-hour window of the delivery	Real time info on delivery	Advanced notifications (within a one-hour window)	Select day and one-hour window delivery in advance	Several delivery options	Possibility to reschedule delivery	Delivery where I am located
RANKING IN 2021	New item	New item	New item	New item	New item	New item	New item

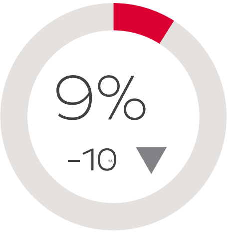
C16new – What delivery options are important to you when choosing an online retailer? Please select one option that is THE MOST IMPORTANT, and another one that is the LEAST IMPORTANT to you.
Rq: Maxdiff module – the items are displayed 4 at a time on 7 different screens, each time the respondent selects the most and least important

xx% European average

Regular e-shoppers

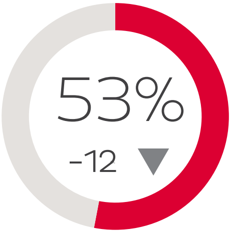
Returns

Only 7% of regular e-shoppers returned their last purchase, which is less than in 2021. However, the return process has been perceived as less effortless, maybe because more of them checked the return policies when they needed to make a return. In most cases, the carrier picked the parcel to return up at home.



... returned their last purchase

14%



... Found it easy/effortless

55% (n = 197)

Top 3 Return Methods

(n = 197)

Carrier picking it up at home	61%	26%
Dropping it off at a parcel shop	14%	31%
Dropping it off at the retailer's store	14%	14%

Return Policies

E-shopper who returned a parcel in the past 12 month looked at the return policies...

Before I make a purchase	52%	-11 ▼	54%
During the purchase process	26%		27%
After the purchase when I want to make a return	23%	+14 ▲	20%

D12. Did you return the item you bought?
C21. Usually, how do you return the parcel?
C22. In general, how much effort did you have to invest into returning the item(s)?
C23. Usually, when do you look at the retailer's return policy/options?

xx% European average

Regular e-shoppers

Green delivery alternatives

Offering green delivery options would interest more than 80% of Romanian regular e-shoppers and they consider it important to have the choice. However, they are mainly thinking about low-emission vehicles and delivery of all products together, more than the delivery places or the delivery time.

70%

60%
European average

Consider that having choice of environmentally friendly delivery alternatives is important when buying online

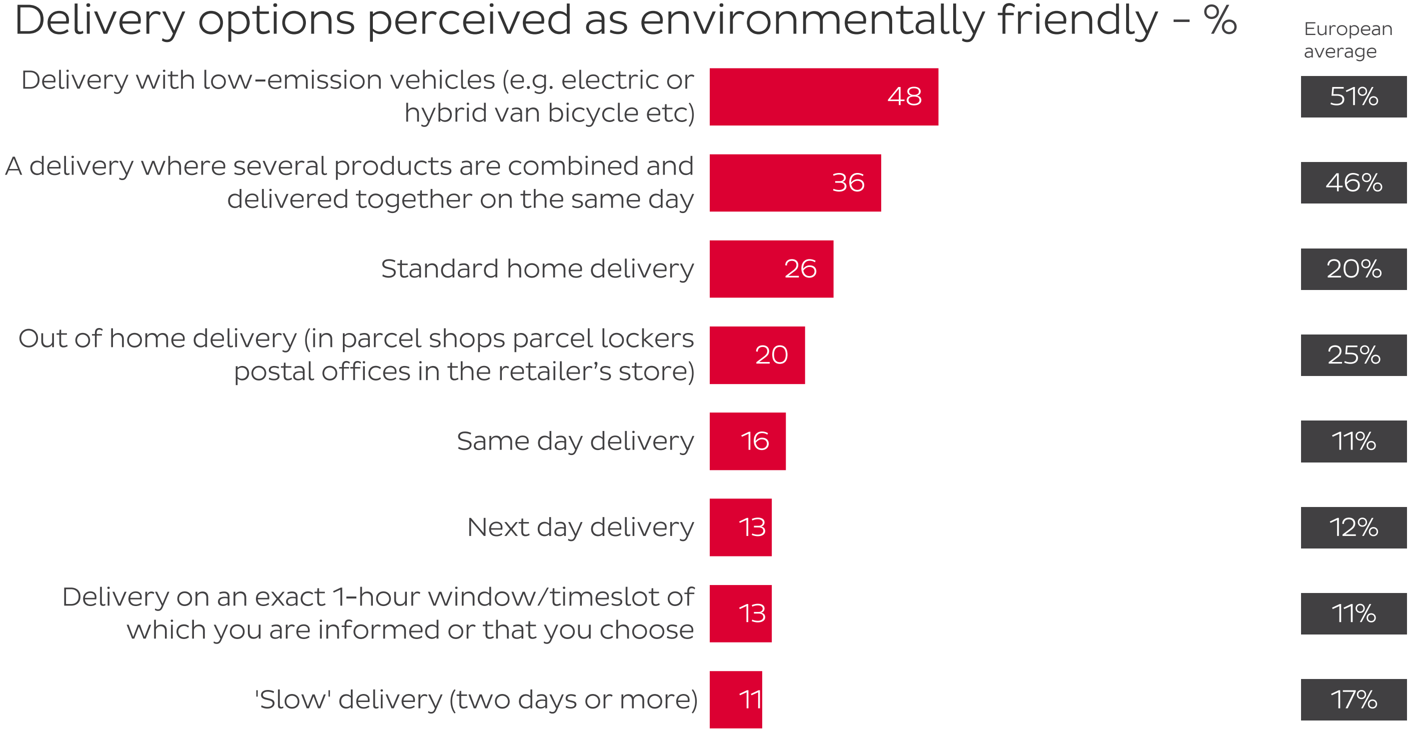
97% for transparent/complete delivery costs
89% for free delivery
84% for various options of place of delivery

83%

64%
European average

would be more likely to opt for a website/ retailer/ app that has environmentally-friendly delivery options - %T2B

Delivery options perceived as environmentally friendly - %



dpdgroup

B1. You will now see a list of criteria which may or may not be important to you when buying online. Which criteria are important for you?
C16bis. Still thinking about the delivery, which of the following delivery options would you consider to be environmentally-friendly?
C17ter. Would you be more likely to opt for a website/retailer/app that has environmentally-friendly delivery options?

xx% European average

Zoom on the Aficionados

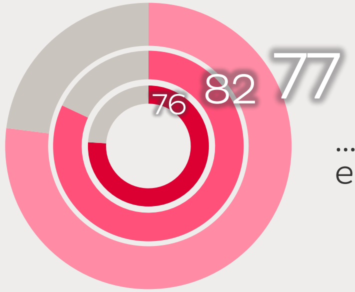
Similar to regular e-shoppers, the return process is perceived as less easy by Aficionados, the last purchase experience as well.

Zoom on the Aficionados

Effort and satisfaction vs. online purchase

The last online purchase, including the delivery part, remain positive for Aficionados. However, the return process is perceived as less easy and the last online purchase experience perception is decreasing overall.

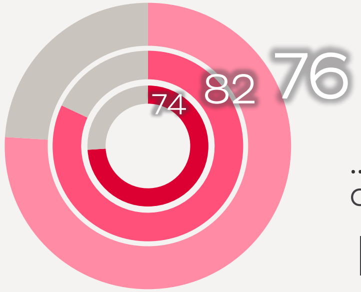
Delivery effort



... found the delivery easy/ effortless

67%

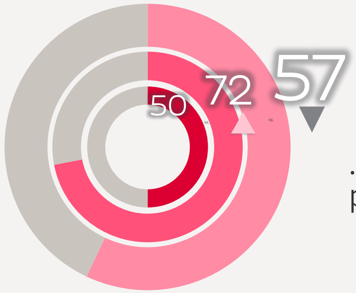
Last online purchase effort



... consider their last online purchase as easy

64%

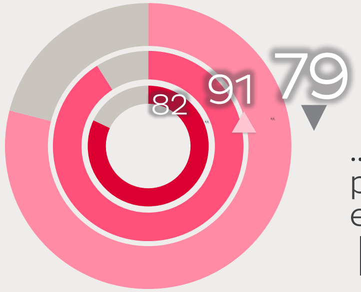
Return effort



... found the return process easy/ effortless

47%

Rating of last online purchase experience



... consider their last online purchase experience as excellent or very good

79%

▲ ▼ Significant increase/ decrease between 2021 and 2019

✚ ▬ vs. regular e-shoppers at 95% confidence rate

% 🟥 2019 🟥 2021 🟥 2022

Zoom on the Aficionados

E-shopping drivers and barriers

Similar to regular e-shoppers, Aficionados consider it very important not having to pay delivery fees. Bad opinion on social media is also their main barrier to buying on the internet.

Important criteria

21,4 **Online purchase drivers** on average

-1 ▼ 19,0

TOP 3 *Items ranked as 1st, 2nd or 3rd most important*

36%	Free delivery	37%
28%	Detailed description of the product	17%
22%	Free return	23%

Biggest evolutions vs. 2021 (apart from TOP 3)

14%	+9 ▲	Fast purchase without account creation
2%	-8 ▼	Choice of environmentally friendly delivery alternatives

Brakes criteria

10,7 **Dissuasive effects** on average

-2 ▼ 10,5

TOP 3 *Items ranked as 1st, 2nd or 3rd most important*

31%	Bad opinion of fellow shoppers on social media	27%
28%	Having to pay delivery fees	29%
27%	Proposed item no longer in stock	20%

Biggest evolutions vs. 2021 (apart from TOP 3)

11%	-10 ▼	Technical bugs on the website/app

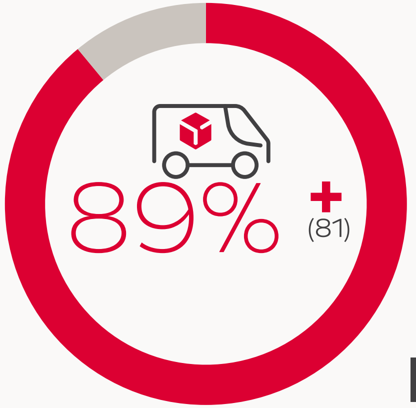
B1a – Among the selected criteria which is the most important for you when buying online? And the second, the third?
B2a – Among the selected criteria which one prevents you the most from buying online? And the second, the third?
Rq: TOP 3 ranking on all answers given

+ − vs. regular e-shoppers at 95% confidence rate

Zoom on the Aficionados

Delivery company

Almost 90% of Aficionados grant importance to the name of the delivery company, seeking for reassurance even more than in the past.



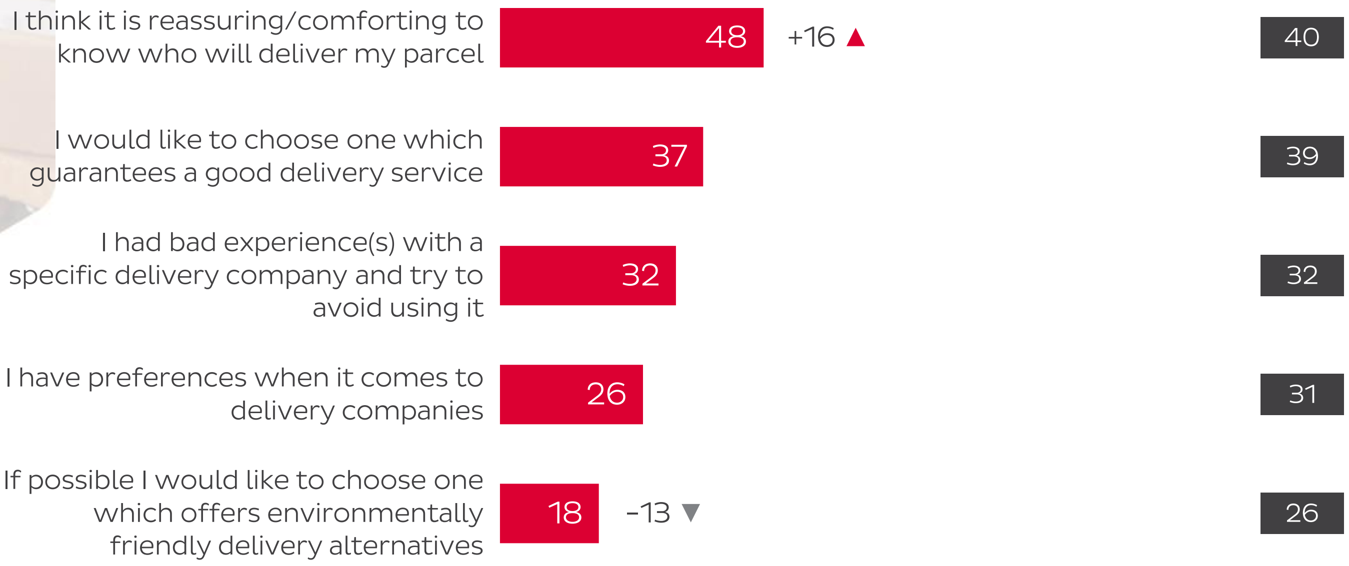
European average

78

...consider it **important** to know the delivery company

Reasons of importance to know the delivery company

% (n = 132)



I think it is reassuring/comforting to know who will deliver my parcel	48	+16 ▲	40
I would like to choose one which guarantees a good delivery service	37		39
I had bad experience(s) with a specific delivery company and try to avoid using it	32		32
I have preferences when it comes to delivery companies	26		31
If possible I would like to choose one which offers environmentally friendly delivery alternatives	18	-13 ▼	26

xx% European average

+ − vs. regular e-shoppers at 95% confidence rate

D15. In your opinion, is it important to know who the delivery company will be, before finalizing the purchase?
D16. You said that for you it is important to know who the delivery company will be, before finalizing your purchase. Which of the following reasons apply to you? Base :think that it is important to know the delivery company before finalizing the purchase
Rq: several answers allowed

4. Appendix

@DPDgroup_news

dpdgroup

DPDgroup

@dpdgroup_news

dpd.com