GEOPOST

ROMANIA REPORT

E-SHOPPER BAROMETER 2023

EXECUTIVE SUMMARY (1/2)

1. E-commerce in Romania in 2023 – in decline after the boom in 2021

- As with the downward trend of European e-commerce, a decline is observed in Romania.
  - After the growth in 2021, the share of Romanian e-shoppers decreases over the past year (-4 pts in 2023).
  - However, the share of regular e-shoppers is in a positive trend. Regular e-shoppers account for more than half of e-shoppers and they received more parcels in the last month than in 2022.
- While Romanian regulars are smaller online buyers than their European peers in terms of frequency, they buy a wider set of product categories, purchasing more than 6 product categories in 2023. They purchase less overtime on the internet the category of high tech/electronics.
- Regular e-shoppers remain deeply convinced by the benefits of online shopping, even more than European average. Compared to 2021, however, they are less convinced of the convenience of online shopping.

2. Romanian regular e-shoppers keep being highly price sensitive

- Romanian regulars remain very price-sensitive, despite a decrease compared to 2021 - two thirds of regulars consider that online shopping is a way to save money. Much less of them are open to pay a premium for green products or products / services that simplifies their life.
- Price-related criteria (free delivery) remain top motivators for online purchase. Having to pay delivery fees is a growing barrier that refrain from buying online this year.
- Romanian regular e-shoppers are widely purchasing online from abroad, to find good deals and locally unavailable products

3. Usage of C2C platforms and e-shopping through social media is evolving

- Usage of C2C platforms is a less developed habit for Romanian regulars than European average, but the trend shows a promising sign:
  - 6 out of 10 regular e-shoppers are buying and/or selling on C2C platforms, most of them buying and only a third are selling products.
  - The frequency of purchase from C2C buyers has increased this year.
- Economic reason remains one of the first driver of using these platforms:
  - For buyers: To save money
  - For sellers: To sell the unused items, free up space, and earn extra money.
- Social media are widely used for shopping purposes, by 9 out of 10 regular e-shoppers: First to find inspiration, and to buy directly, mainly from their acquaintances' recommendations.

EXECUTIVE SUMMARY (2/2)

4. The perception of online purchase and delivery experiences are stable in 2023

- The satisfaction towards delivery and last online purchase remain very well perceived, above the European average. Yet, it shows a slight downward trend in 2023. Their overall satisfaction remains high and stable.
- More than it is to their European peers, knowing the delivery company is crucial for Romanian regular e-shoppers – in order that they are reassured, and they choose the company that offers good service.
- Steady situation with the returns:
  - 11% of regular e-buyers returned their last purchase, less than in 2021. They also are less to find the return process easy and effortless.
  - As a returning method, regulars especially let the carrier picking up the parcel at their home.
- In terms of delivery places, home delivery remains the dominant choice for Romanian regulars, but the usage of parcel lockers is growing overtime.

5. The online heavy buyers, "The Aficionados", stand out in Romania

- This specific group of e-shoppers is receiving 6 parcels per month on average and is buying almost 10 different product categories online – enjoying one the highest level in Europe.
- After a strong dynamic during Covid, then a lull in 2022, Aficionados show again a positive trend this year.
- As the regulars, they are highly price sensitive and even more bargain hunters than the regulars. On the other hand, they are highly open to pay a premium for green products or products / services that eases their life.
- They use more delivery places than the regular e-shoppers, more of them using OOH delivery places except parcel lockers and post office deliveries.
- The Aficionados remain satisfied with their last online purchase experience, they perceive their last online purchase and delivery as easy, even more than European Aficionados.

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.

METHODOLOGY

Data collection

- Online data collection (blind: interviewees do not know who requested the study)
- 24,233 interviews across 22 European countries (unweighted)
- Number of interviews per country (unweighted):

Austria:	1,005
Belgium:	1,003
Bulgaria:	1,014
Croatia:	808
Czech Republic:	1,035
Estonia:	801
France:	1,501
Germany:	1,506
Hungary:	1,014
Ireland:	1,003
Italy:	1,504
Latvia:	806
Lithuania:	804
Netherlands:	1,007
Poland:	1,570
Portugal:	1,006
Romania:	**1,015**
Slovakia:	1,009
Slovenia:	809
Spain:	1,502
Switzerland:	1,009
UK:	1,502

Fieldwork

Fieldwork conducted from May 31st to July 19th, 2023

LEGEND FOR EVOLUTIONS

Significant differences

between 2023 and 2022 / 2021 scores are shown as follows (at 95% confidence rate)

when **positive**:	+XX	▲	vs 2022	+XX	△	vs 2021
when **negative**:	-XX	▼	vs 2022	-XX	▽	vs 2021

with +/- xx the number of points difference vs. 2023.

No arrows if no significant difference

HOW IS E-COMMERCE EVOLVING IN THE CURRENT CONTEXT?

THROUGH REGULAR E-SHOPPERS

1. How is e-commerce evolving in the current context?

2. To what extent has inflation impacted e-shopping?

3. What are the main trends of delivery?

4. Appendix

1.

HOW IS E-COMMERCE EVOLVING IN THE CURRENT CONTEXT?

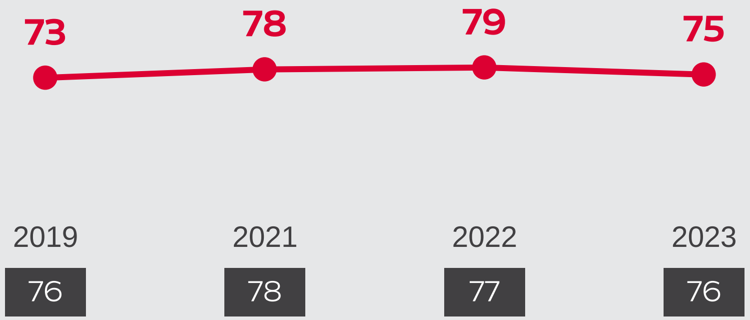
- A decreasing share of e-shoppers in Romania, while the share of regulars is on a positive trend.
- Regular e-shoppers received more parcels this year, from the same number of categories than in 2022
- Aficionados are back on track in terms of number of parcels received
- Romanian regulars are heavy users of social media for shopping.

TOTAL E-SHOPPERS AND REGULAR E-SHOPPERS

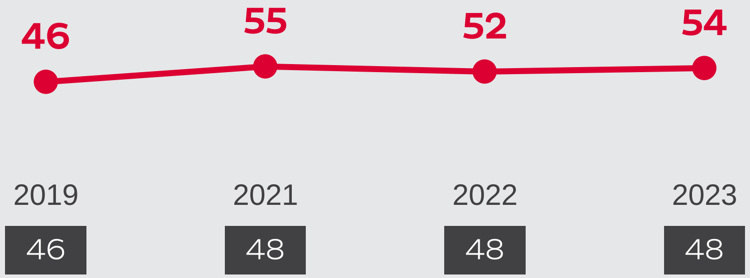
E-COMMERCE KEY TRENDS IN SCORECARD

After the increase in the number of Romanian e-shoppers in 2021 during the Covid-19 pandemic, the trend has reversed this year. However, the share of regulars tends to increase vs. 2022, and they received more parcels than last year.

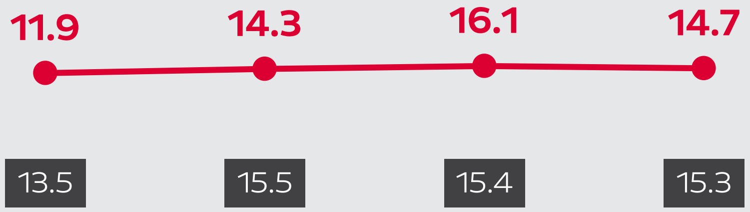
% - Share of e-shoppers among total population



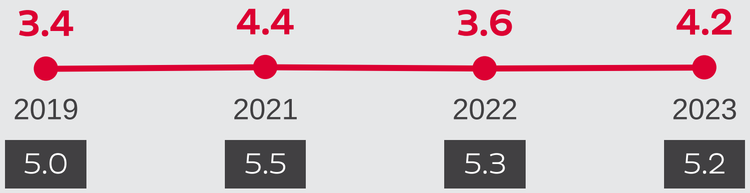
% - Share of regular e-shoppers among total e-shoppers



% - Average share of online shopping for regular e-shoppers



Number of parcels received last month by regular e-shoppers

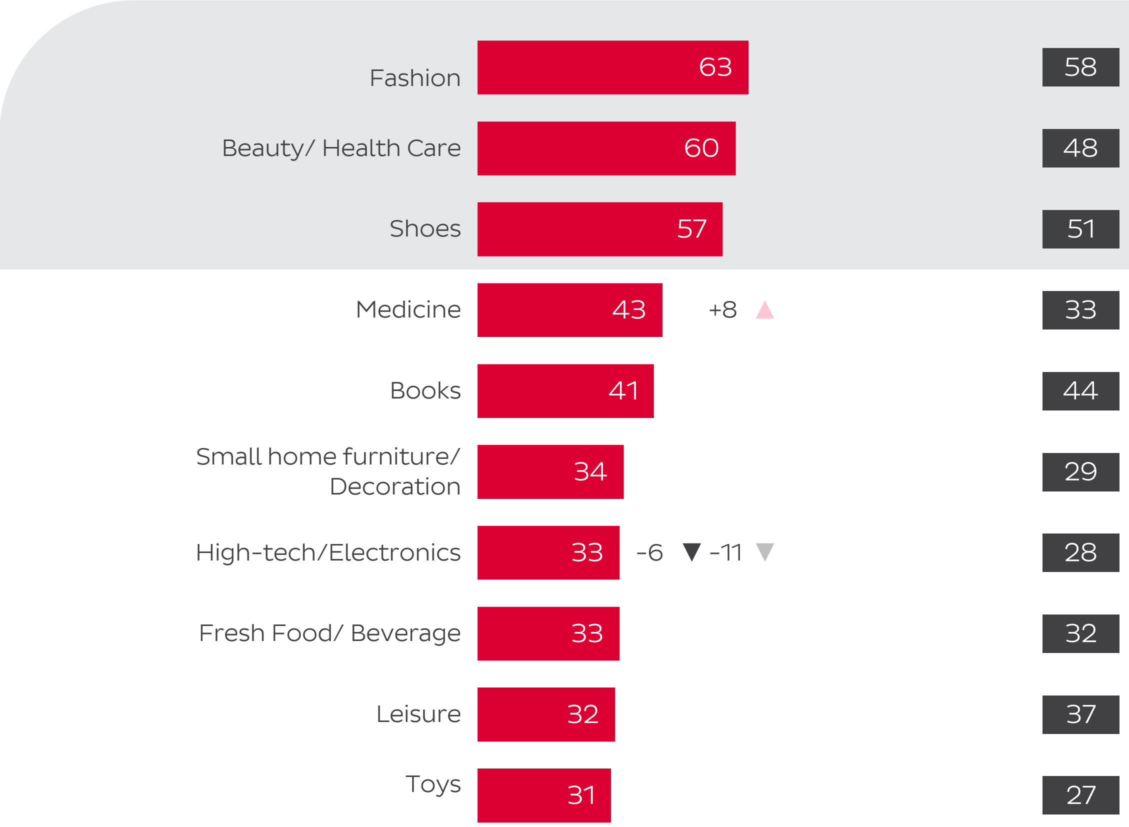


Significant differences are not shown in this slide

REGULAR E-SHOPPERS POPULAR CATEGORIES

Romanian regulars still buy 6 product categories on average, more than their European counterparts. Yet, in 2023, less bought high tech / electronics, accessories and jewelry online, opposite to the increasing trends for medicines.

% – TOP 10 types of goods purchased online since January



6.3

5.9

categories bought on average

Biggest evolutions vs. 2022 (apart from top 10)

31% Accessories and jewellery -5 ▼

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

REGULARS' IMAGE OF E-SHOPPING

Regular e-shoppers keep being highly convinced by the benefits of e-shopping, though a bit less of them find online so convenient that they could buy more and more online.

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

71% 66%

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

68% -6 ▼ 60%

"Shopping online allows me save time" - %T2B

81% 76%

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

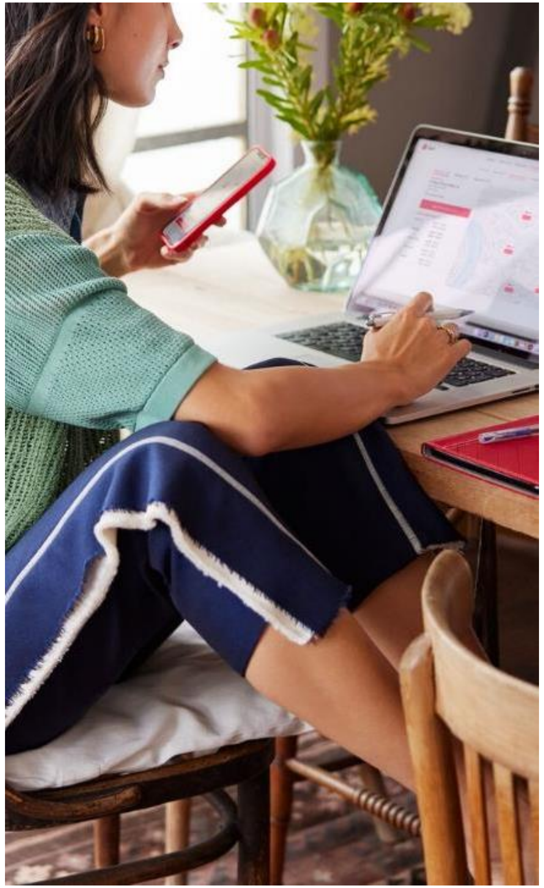
63% 55%

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

XX% European average

AFICIONADOS ONLINE PURCHASE HABITS AT A GLANCE

After a strong decrease observed in 2022, the share of Aficionados has stabilised in 2023 with a directionally positive trend overall. They received more parcels this year than last year although still below the European average (same observation as for regulars).



2022 **58%** 2021 **68%**

59% − (90)

58%

of all online purchases made by the Aficionados

2022 **23.1%** 2021 **19.6%**

20.9%

21.3%

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

2022 **5.0** 2021 **7.7**

6.1 +(4.2) ▲▼

7.2

number of parcel received last month

Last purchase preparation

27%

29%

Sudden impulse (last purchase)

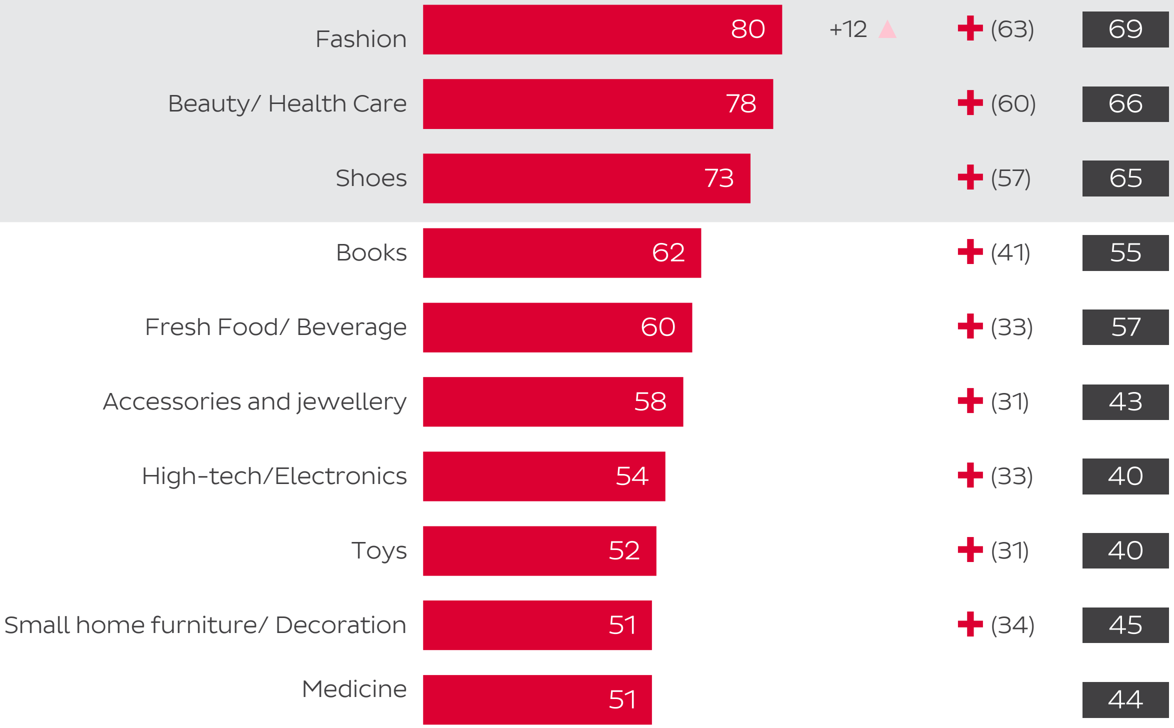
+ − vs. regular e-shoppers at 95% confidence rate

ZOOM ON THE AFICIONADOS

AFICIONADOS POPULAR CATEGORIES

In 2023, Aficionados continue to have a very diversified basket, slightly smaller than in 2021 but still higher than their European peers and keep developing their purchases around fashion products.

% – TOP 10 types of goods purchased online since January



9.6 ✚(6.3) -1.0 ▼ 8.6

categories bought on average

Biggest evolutions vs. 2022 (apart from top 10)

No other evolution

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

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

C2C PLATFORM USAGE & SOCIAL MEDIA SHOPPING

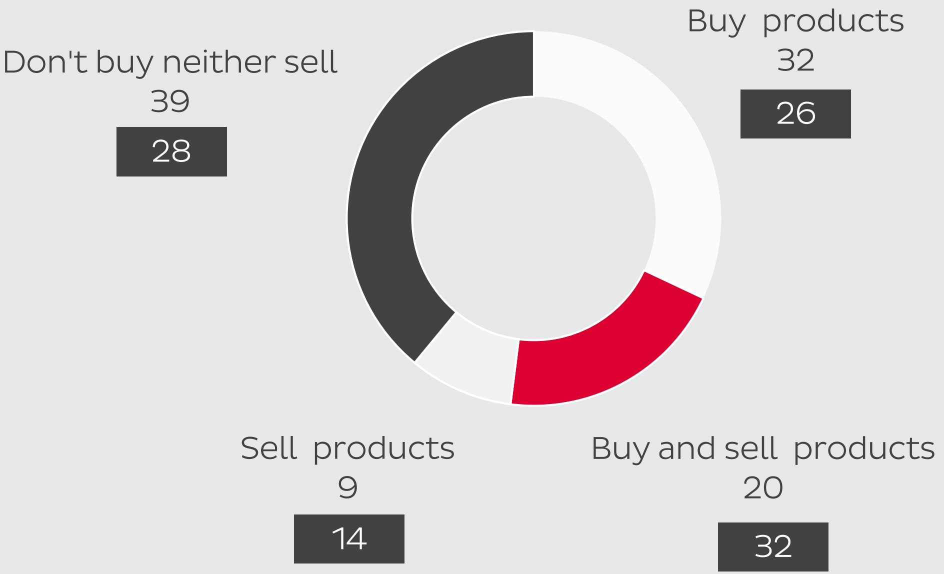
6 out of 10 Romanian regular e-shoppers are using C2C platforms. Although the lower usage level than their European peers, they use C2C platforms more frequently. Most of them are buyers, while only a third of Romanian regulars are using those platforms to sell products.

In parallel, almost 7 in 10 of Romanian regulars shop directly from social media, which is above the European average.

ONLINE SHOPPING BETWEEN INDIVIDUALS

6 out of 10 regular e-shoppers use CtoC platforms, either as buyers or as both as sellers and buyers. Romanian regulars are less to shop between individuals than their European.

% - Buying and selling on second-hand platforms



61%

buy or sell products

72%

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.)?

xx% European average

Question added in 2022, no comparison with 2021

REGULAR E-SHOPPERS – FOCUS ON C2C USERS

C2C USERS PROFILE

Female

52% 56%

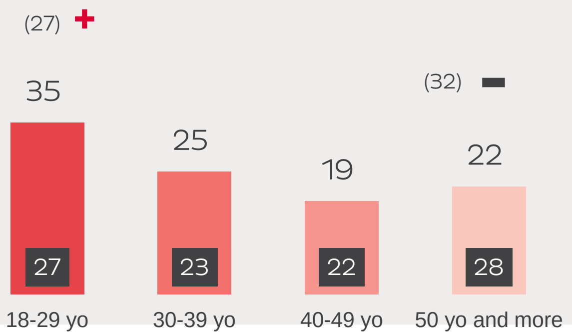
Income

55% 54%

Lower

Age

37.8 y.o − (41.2) 40.5



Marital status

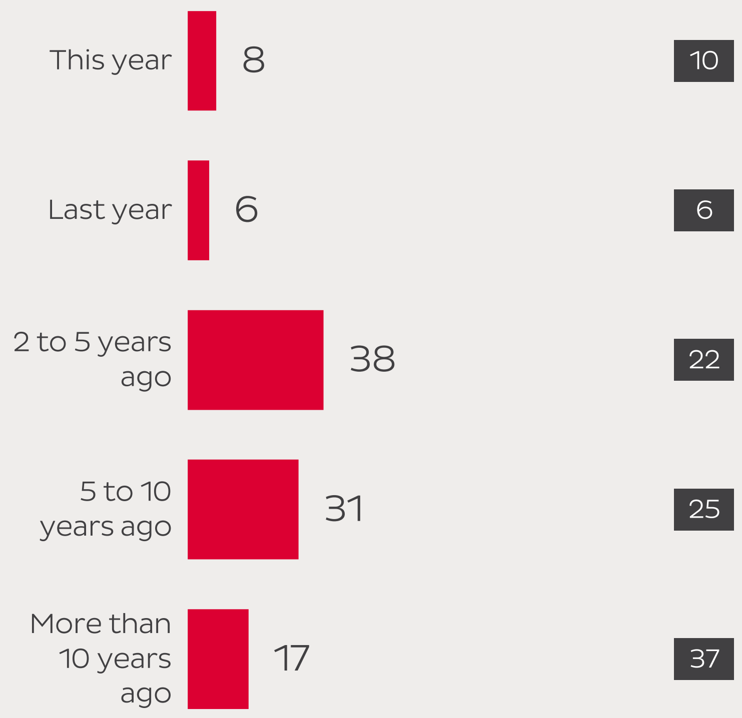
19%	Single	31%
57%	Married	44%
17%	Cohabitation	17%
5%	Divorced	6%

City size

84% 86%

Urban

% – Started purchasing online ...



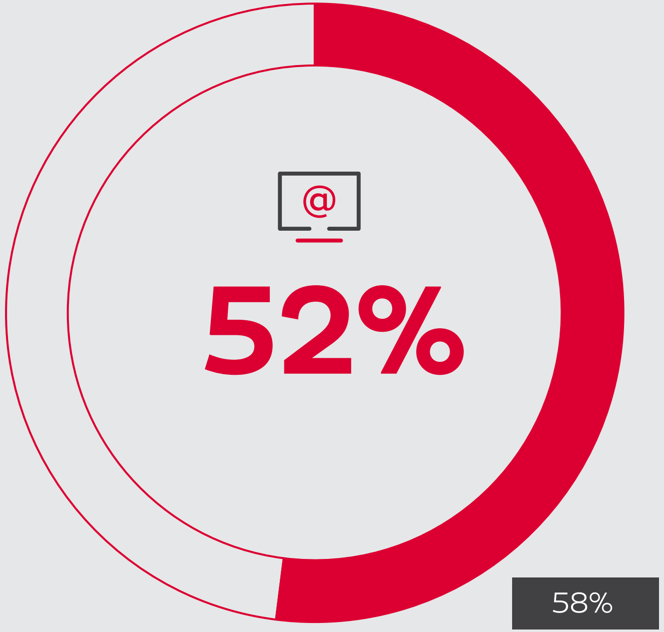
No comparaison vs. 2021

N=330
RS0; RS1; RS2; RS2RECAP; RSX; S2; C1; A2

\+ − vs. regular e-shoppers (xx) at 95% confidence rate

BUYING PRODUCTS ON C2C PLATFORMS

C2C platform buyers purchase more often than before, with almost 40% purchasing at least once a month. Yet, they purchase less frequently on these websites/apps than their European peers.



...buy products on C2C platforms

31%

(% agree & strongly agree)

"I buy **more** second-hand products these days" 35%

Frequency of purchase

(n = 280)

38%	at least once a month		44%
30%	once every 2 or 3 months		29%
32%	less often	-10▼	27%

10.6 times per year on average 12.1

+2.5▲

XX European average

Question added in 2022, no comparaison with 2021

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

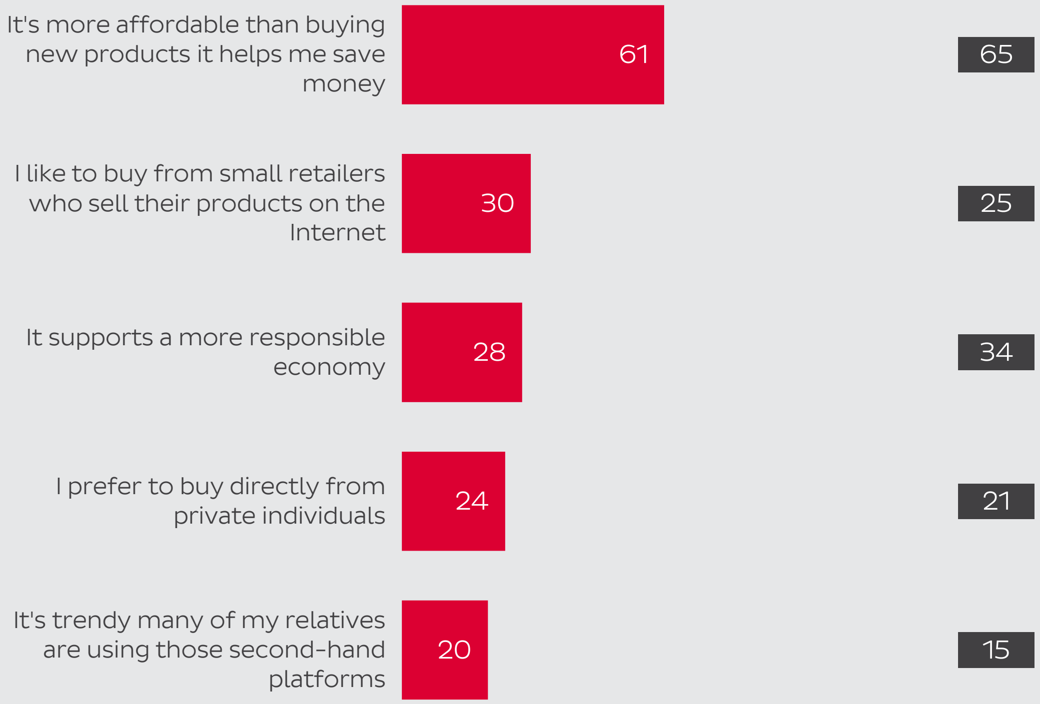
REGULAR E-SHOPPERS

BUYING PRODUCTS ON C2C PLATFORMS

C2C usage is motivated by far by money saving benefits, followed by the intention of supporting small retailers. In Romania, more than half of CtoC buyers had the carrier chosen by the seller.

Reasons of purchase – %

(n = 280)



Choice of delivery

53% 47%

Carrier chosen by the seller

45% 49%

Carrier proposed by the website

30% 32%

Hand delivery

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

Question added in 2022, no comparaison with 2021

SELLING PRODUCTS ON C2C PLATFORMS

Selling products on C2C platforms is not a common habit for Romanian regulars: less than a third sell products on those websites / apps. Their main motivations to sell are because they have items in good condition, to free up space, and to earn extra money.

...**sell** products on C2C platforms

Reasons of selling – %

(n = 158)

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

XX European average

REGULAR E-SHOPPERS – FOCUS ON C2C USERS

ONLINE PURCHASE HABITS & ATTITUDES

Compared to regulars, C2C users are more trend-savvy, more passionate about e-commerce and prepared to pay more for products that make their lives easier. They are heavier online buyers than the regulars overall.

6.7

European average 6.3

Different types of goods bought since January on average

Top 7 Categories

1. Fashion	65%	59%
2. Shoes	59%	53%
3. Beauty/ Health Care	57%	48%
4. Books	40%	46%
5. Medicine	40%	34%
6. High-tech/Electronics	39%	30%
7. Toys	35%	30%

Attitudes specificities vs. regular e-shoppers

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

Positive ✚

57%	Relative to other people I have more passion about e-shopping	(50)	47%
45%	It is very important for me to buy trendy brands	(38)	34%
44%	Once I find a brand that satisfies me I usually don't experiment with new ones'	(35)	33%
42%	I buy more second-hand products these days	(31)	43%
37%	I'm ready to pay a price premium for services that make my life easier	(29)	37%

+6 vs Regular
-1 vs. 2022

48 Annual number of purchases

European average 45

/!\ No significance test on median

15.0% 15.7%

Average share of online shopping

(on total shopping – average of all categories)

No comparaison vs. 2021

xx% European average

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

A1;A5;SC2;G11

REGULAR E-SHOPPERS – FOCUS ON C2C USERS

DELIVERY PLACES & PREFERENCES

Home is from far the preferred delivery place of the C2C users, in line with the delivery places used by regular e-shoppers overall. Having several delivery options matter much more to them, compared to regulars.

Top 5 - Usual delivery places

75%	Home	72%
32%	Locker station	25%
23%	Post office	17%
20%	At work	12%
13%	Parcel shop	26%

1.9

Delivery places on average

2.0

Top 5 – Delivery preferences (importance index – average interest = 100)
/!\ No significance test on index

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

84%

73%

…consider it important to know the delivery company

N=330
C14;D15;C16new

No comparaison vs. 2021

xx% European average

✚ ━ vs. regular e-shoppers (xx) at 95% confidence rat

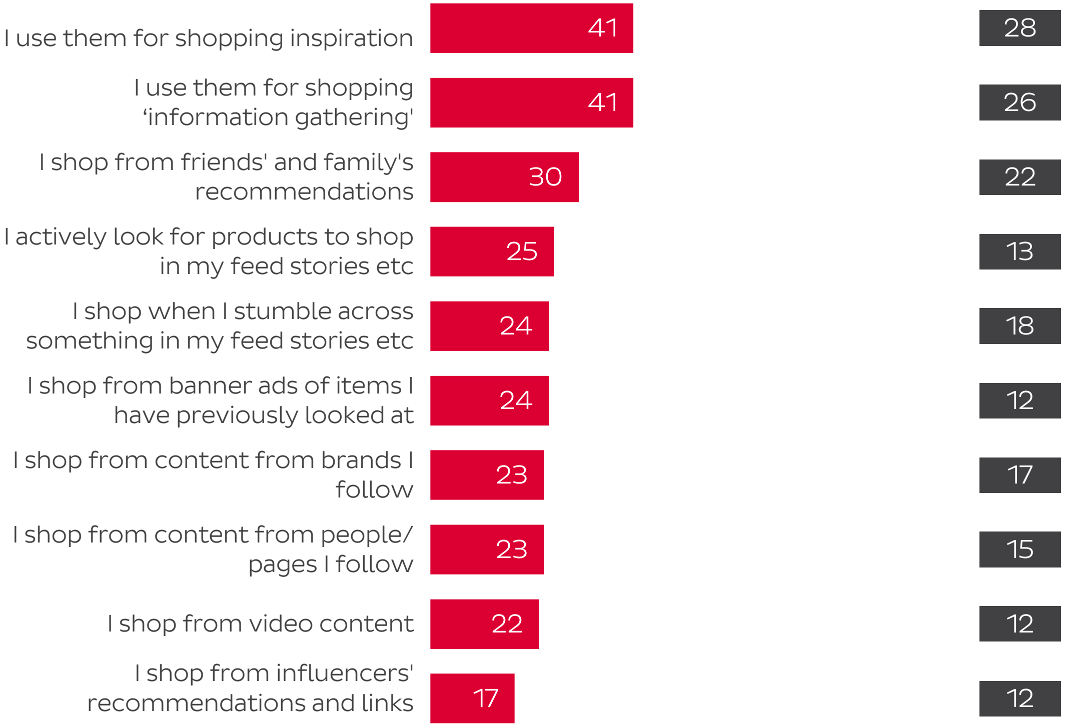
REGULAR E-SHOPPERS

SHOPPING THROUGH SOCIAL MEDIA (AMONG SOCIAL MEDIA USERS)

Romanian regulars are heavy users of shopping from social media. Their use are high and multiple, finding inspiration and information being the top ones, and almost 7 in 10 shop directly from these platforms.

Shopping activities done on social networks –%

(Among social media users (n = 531)



90% of social media users use them for at least one shopping purpose

70%

68% …shop directly from social media

48%

2.7 Activities on average

1.8

XX European 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?

Question added in 2022, no comparaison with 2021

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TO WHAT EXTENT HAS INFLATION IMPACTED E-SHOPPING?

- Regulars e-shoppers remain highly price-sensitive, yet less than in 2021.
- Same findings among the Aficionados, though more open to pay a premium for green and helpful products.
- Regulars and Aficionados are many to purchase on foreign websites, mainly to look for good deals.
- Regulars e-shoppers, heavy users of shopping on social media, tend to rely less on social media influences.

2.

REGULAR E-SHOPPERS

ATTITUDE TOWARDS PRICE

In 2023, the regulars remain very price-sensitive, despite a decrease compared to 2021. Still 8 in 10 look forward to really good deals and 2/3 to big promotional events. To note, much less of them are open to pay a premium for green products or products / services that simplifies their life.

65% 65%

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

70% -7 ▼ 62%

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

80% -6 ▼ 69%

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

65% -6 ▼ 53%

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

29% -14 ▼ 34%

“I'm ready to pay a price premium for services that make my life easier” - %T2B

49% -10 ▼ 39%

“I’m willing to pay a premium for products/services that are respectful of the environment” - %T2B

XX European average

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

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REGULAR E-SHOPPERS

ONLINE PURCHASE DRIVERS

Among drivers of online purchase, free delivery remains at the top of the ranking, followed by detailed description of the product already high in 2022 in Romania. The ability to pay cash on delivery is a growing driver, as well as to have various options of delivery places.

Top 10 important criteria when buying online % – (out of 25 criteria)

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

Biggest evolutions vs. 2022 (apart from TOP10)

No other evolution

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

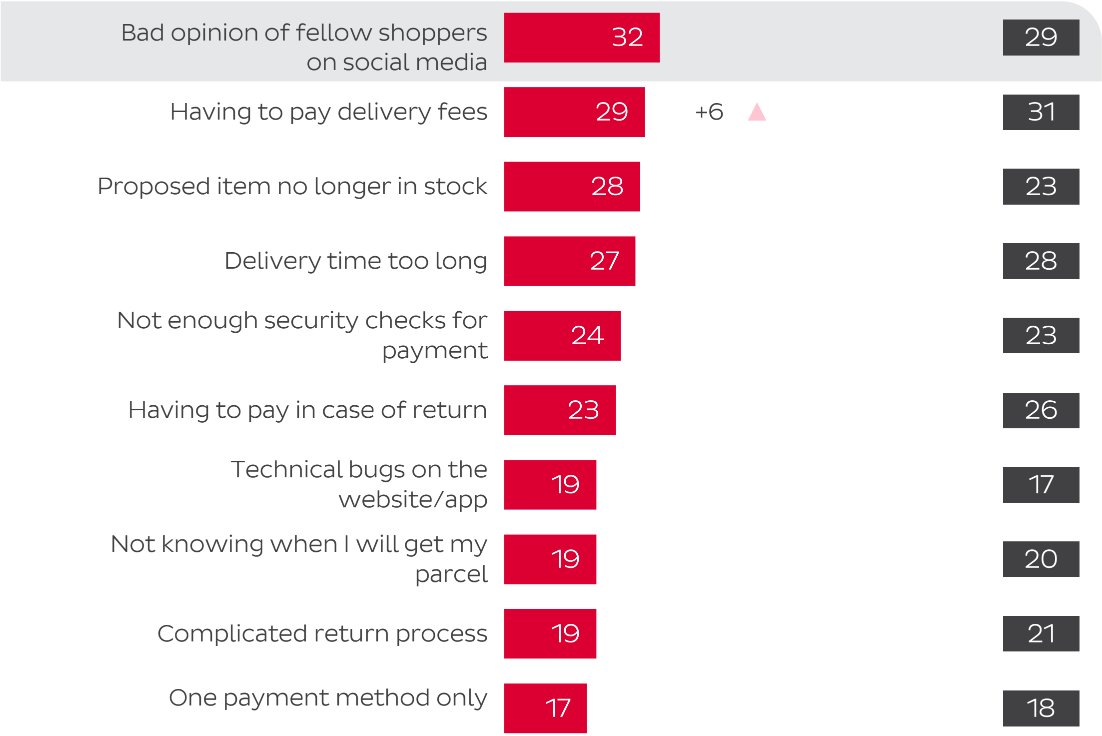
xx% European average

DISSUASIVE EFFECTS

The reputation on social media remains the strongest barrier to buying online from a specific e-tailer. Having to pay delivery fee is a growing one, now being the second one in the ranking.

Top 10 features that prevent the most from buying online % – (out of 16 criteria)

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



Biggest evolutions vs. 2022 (apart from TOP10)

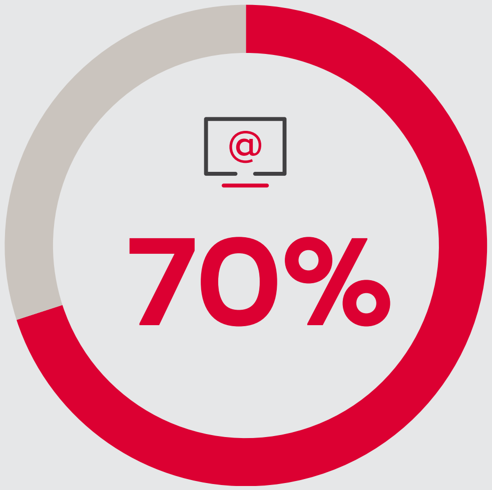
No other evolution

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

FOREIGN VS. LOCAL

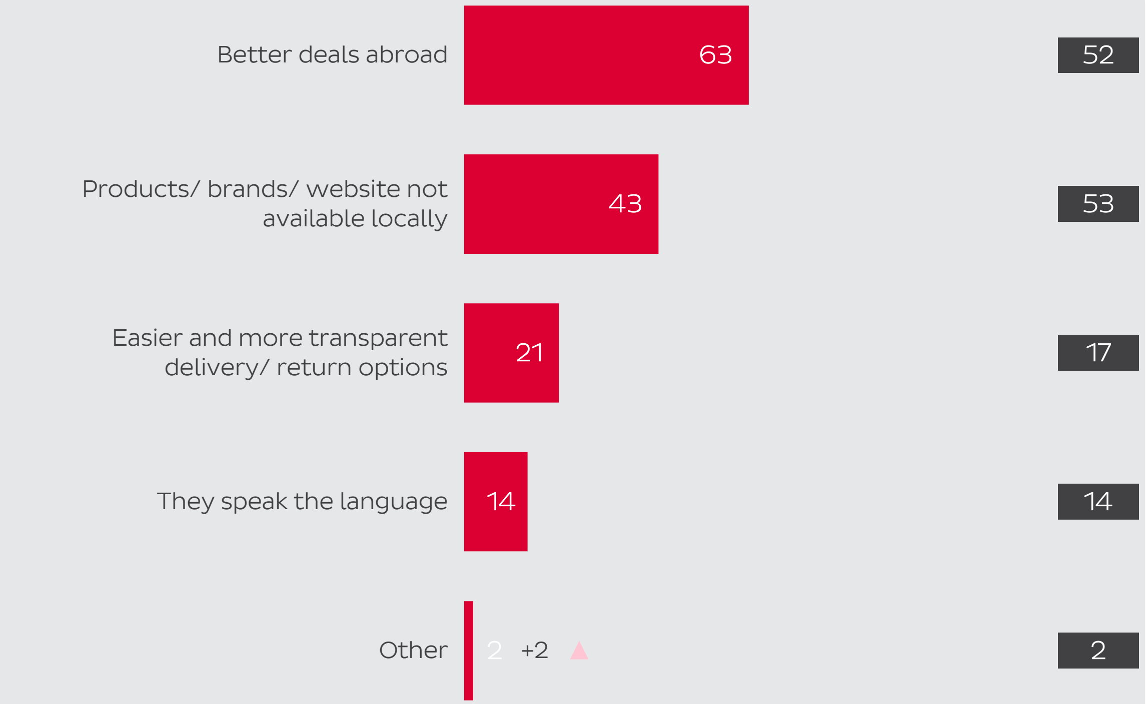
This year again, 7 out of 10 Romanian regulars are buying on foreign websites, mainly to benefit from better deals, and secondly to find products not available in their country – but far less than the European peers .



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

58%

Reasons to make purchases from foreign websites % (n = 377)



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

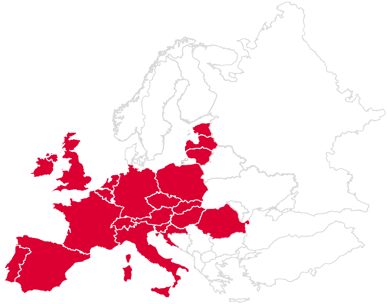
PURCHASES FROM FOREIGN COUNTRIES

As in the last years, purchases on foreign websites are mostly made from China and from European countries.

Top 3 most common foreign countries for buying online

1	China	51%	48%
2	Germany	36%	28%
3	UK	26%	24%

63% 65% in other parts of the world



77% 73% in Europe

15% 45% from neighbouring countries

C7 – From which countries? Base: People that have already bought online from foreign websites (n = 377)
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 PRICE SENSITIVE E-SHOPPERS

Price sensitive e-buyer has been defined as a regular e-shopper which showed price sensitivity by making price the most important factor for its purchase:

- %TB “Price is the most important factor in my purchasing decisions”

N = 163, country weighting applied.

REGULAR E-SHOPPERS – FOCUS ON PRICE SENSITIVE

REGULAR PRICE SENSITIVE E-BUYERS PROFILE

Female

61% 61%

Income

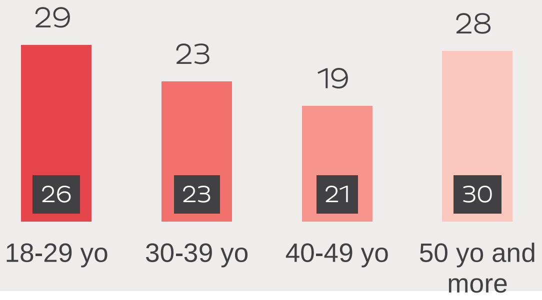
62% 62%

Lower

Age

40.1 y.o

European average 41.2



Marital status

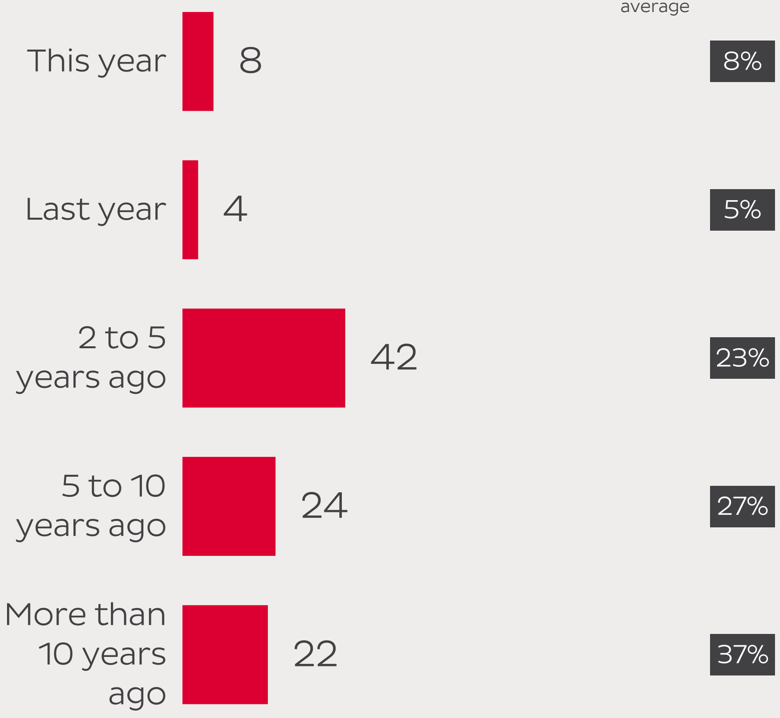
			European average
22%	Single		33%
57%	Married		42%
13%	Cohabitation		15%
4%	Divorced	-7 ▼	7%

City size

86% 85%

Urban

% – Started purchasing online ...



XX European average

No comparaison vs. 2021

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

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

REGULAR E-SHOPPERS – REGULAR PRICE SENSITIVE

ONLINE PURCHASE HABITS & ATTITUDES

Good deals are more important to price sensitive e-buyers, who recognize the time saving benefit from online shopping, although they would not buy all the products on the internet. They receive a bit more parcels than their regulars peers.

6.3

European average **5.9**

Different types of goods bought since January on average

Top 7 Categories

		European average
1. Fashion	66%	59%
2. Beauty/ Health Care	64%	50%
3. Shoes	55%	51%
4. Books	44%	41%
5. Medicine	43%	32%
6. Small home furniture/ Decoration	35%	30%
7. Accessories and jewellery	34%	27%

+3 vs Regular
-1 vs. 2022

45 Annual number of purchases

European average **39**

/!\ No significance test on median

15.2% 15.3%

Average share of online shopping

(on total shopping – average of all categories)

Attitudes specificities vs. regular e-shoppers

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

Positive ✚

			European average
92%	I am always on the lookout for a really good deal	(80)	86%
91%	Shopping online allows me to save time	(81)	86%
79%	There are products that I would never buy online	(66)	73%
79%	I actively look for reviews and ask for recommendations online before making a purchase	(69)	66%
79%	My mobile is quickly becoming my main shopping tool	(68)	64%
76%	I actively look for products and services that help me have a healthy lifestyle	(68)	59%
70%	I prefer to buy products manufactured in my country	(59)	56%
69%	I am concerned about the impact of e-commerce on society	(58)	49%
66%	Relative to other people I have more passion about e-shopping	(50)	52%

No comparaison vs. 2021

xx% European average

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

REGULAR E-SHOPPERS - REGULAR PRICE SENSITIVE

DELIVERY PLACES & PREFERENCES

Delivery at home is the first used place by price-sensitive e-buyers as well, followed by locker station delivery, used by more of them this year. Having several delivery options and knowing the delivery company is very important to them.

Top 5 - Usual delivery places

79%	34% +11 ▲	23%	18%	14%
Home	Locker station	Post office	At work	Parcel shop
79%	22%	17%	10%	24%

1.9

Delivery places on average

1.9

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

/!\ No significance test on index

143	143	139	135	127
Know the exact one-hour window of the delivery	Several delivery options	Real time info on delivery	Select day and one-hour window delivery in advance	Advanced notifications (within a one-hour window)
RANKING AMONG REGULAR E-SHOPPERS				
#1	#3	#4	#2	#7

81%

69%

...consider it important to know the delivery company

No comparaison vs. 2021

C14;D15;C16new

xx% European average

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

ZOOM ON THE AFICIONADOS

Like regular e-shoppers, Aficionados are highly price sensitive, yet a little bit less than in 2021.

ATTITUDES TOWARDS PRICE

Same findings among the Aficionados: they are highly price sensitive, yet less than during Covid-19 pandemic. Though, more of them than regulars are looking for big discount events. Despite a decrease, they remain widely open to pay a premium for green products or services and products that eases their life.

80% -14 ▼ 74%

"I am always on the lookout for a really good deal" - %T2B

72% -14 ▼ 61%

"Price is the most important factor in my purchasing decisions" - %T2B

74% +(65) -17 ▼ 61%

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

68% -16 ▼ 70%

of Aficionados consider that shopping online saves money - %T2B

43% +(29) -25 ▼ 45%

"I'm ready to pay a price premium for services that make my life easier" - %T2B

62% + (49) -19 ▼ 48%

"I'm willing to pay a premium for products/services that are respectful of the environment" - %T2B

xx%

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

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

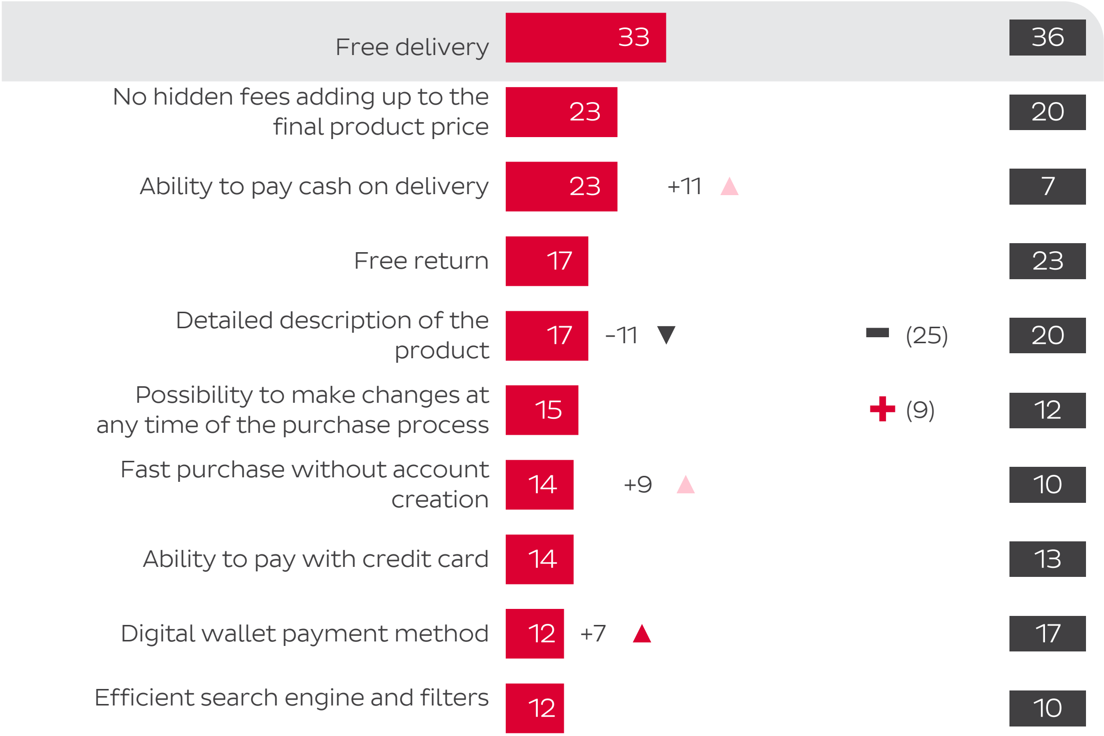
ZOOM ON THE AFICIONADOS

ONLINE PURCHASE DRIVERS

Unlike regulars, Aficionados put less importance on detailed description of the product vs. last year.
They are more interested into cash payment on delivery, while free delivery and no hidden fees remain their main drivers.

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

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



Free delivery	33			36
No hidden fees adding up to the final product price	23			20
Ability to pay cash on delivery	23	+11 ▲		7
Free return	17			23
Detailed description of the product	17	-11 ▼	− (25)	20
Possibility to make changes at any time of the purchase process	15		+ (9)	12
Fast purchase without account creation	14	+9 ▲		10
Ability to pay with credit card	14			13
Digital wallet payment method	12	+7 ▲		17
Efficient search engine and filters	12			10

Biggest evolutions vs. 2022 (apart from TOP10)

Transparent and complete delivery costs	**7%**	-8 ▼
Choice of environmentally friendly delivery alternatives	**9%**	+7 ▲

XX European average

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

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

ZOOM ON THE AFICIONADOS

DISSUASIVE EFFECTS

When focusing on online purchase barriers, no significant evolution vs. 2022 in the top 10. Bad opinions on social media, too long delivery time and return fees remain the top 3 equal barriers.

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. 2022 (apart from TOP10)

No other evolution

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

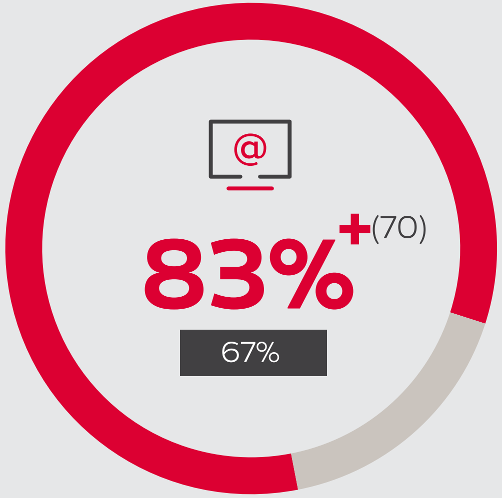
XX European average

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

ZOOM ON THE AFICIONADOS

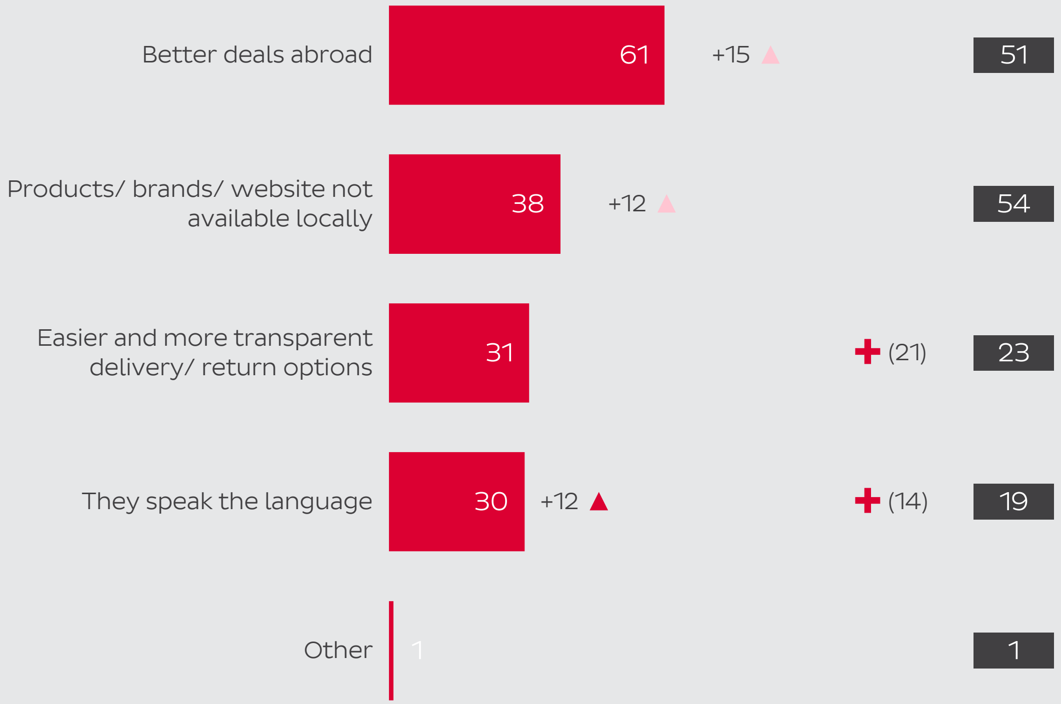
FOREIGN VS. LOCAL

The Aficionados are even heavier buyers on foreign websites. They are looking to better deals abroad – even more so vs. 2021 – also to find products not available locally, and because they speak the language of the country more than last year.



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

Reasons to make purchases from foreign websites % (n = 126)



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

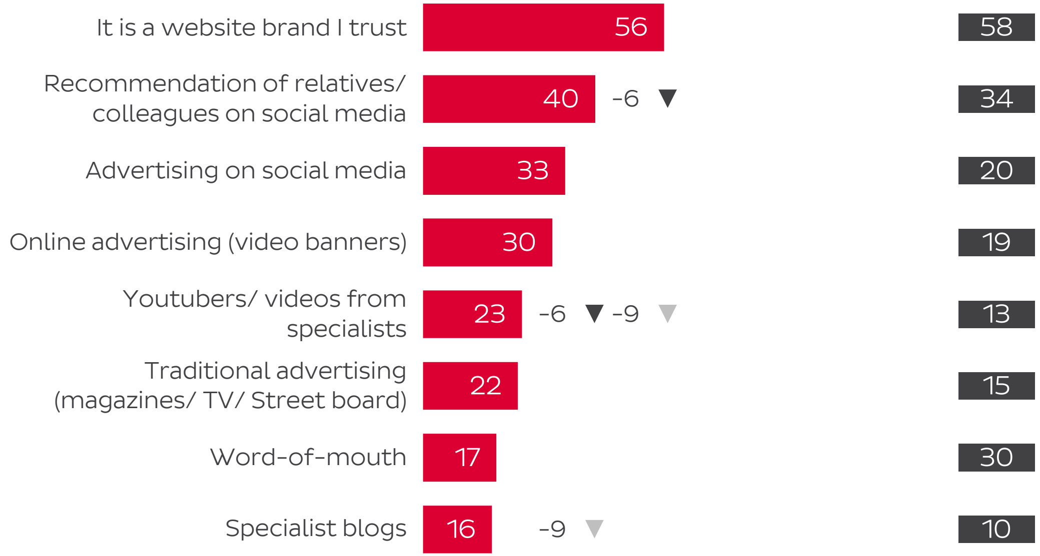
✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

REGULAR E-SHOPPERS

REVIEWS AND RECOMMENDATIONS

Regular e-shoppers rely on their trust when they choose a website, and on their relatives' recommendations, though lesss than before. Many of them share a feedback after purchase and the influence of social media remains very high.

Drivers when choosing a website/ an app-%



2.4 -0.2▼ -0.3▼ 2.0

Average number of influencers

83% 67%

Share or publish a feedback after purchasing

69% -10▼ 55%

NET Social Media and influencers

xx% European average

C18 – When shopping online, how do you choose a website and/or an app?
C19 – Do you publish or give feedback, after purchasing?
Rq: Several answers allowed

WHAT ARE THE MAIN TRENDS OF DELIVERY?

- Romanian regular e-shoppers keep favouring home delivery by far but overtime their usage of parcel lockers is growing.
- Regular e-shoppers are heavy users of delivery services, yet a bit less than in 2021.
- Slight downward trend in regulars' satisfaction about delivery and last online purchase, yet their overall satisfaction remains high and stable.

3.

REGULAR E-SHOPPERS

TOP DELIVERY PREFERENCES

Being informed on the exact time of delivery, and real time info remain the top expectations of Romanian regular e-shoppers. Having several delivery options is going up in the ranking.

Delivery preferences (importance index – average interest = 100)

153	**148**	**147**	**139**	**138**	**116**	**110**
123	152	143	118	134	126	87
Know the exact one-hour window of the delivery	Real time info on delivery	Several delivery options	Advanced notifications (within a one-hour window)	Select day and one-hour window delivery in advance	Possibility to reschedule delivery	Delivery where I am located

RANKING IN 2022

#1 =	#2 =	#5 +2	#3 -1	#4 -1	#6 =	#7 =

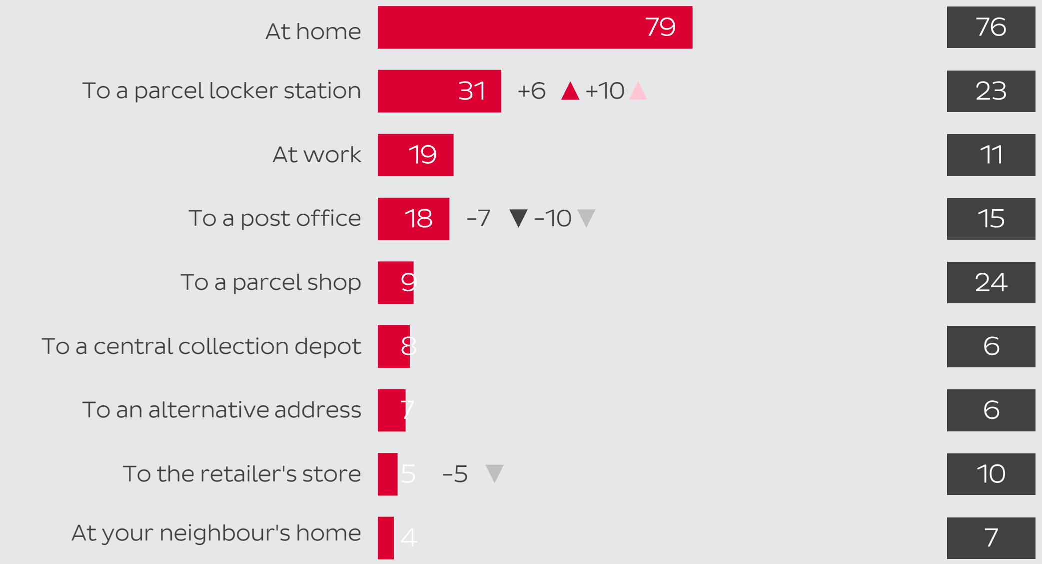
C16new – What delivery options are important to you when choosing an online retailer?
Please select one option that is THE MOST IMPORTANT, and another one that is the LEAST IMPORTANT to you.
Rq: Maxdiff module – the items are displayed 4 at a time on 7 different screens, each time the respondent selects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

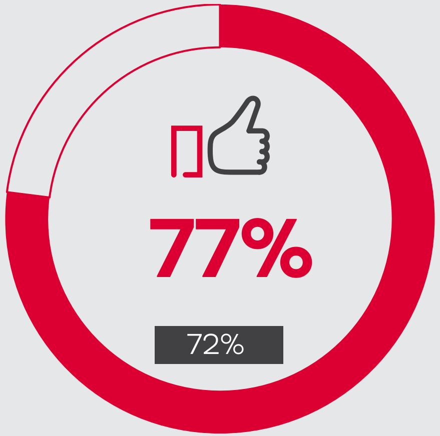
xx% European average

DELIVERY PREFERENCES

Regulars' deliveries remain highly concentrated at home. Usage of parcel lockers is growing overtime, and regulars are less to use post office and retailer's store delivery. They eventually use the same number of delivery places than before.

Usual delivery places-%





... found delivery easy/effortless

1.8 1.9 Delivery places on average

48% 51%

Usually use more than one delivery place

38% 44%

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

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?

European average xx%

REGULAR E-SHOPPERS – FOCUS ON OOH USERS

OUT OF HOME DELIVERY USERS PROFILE

Female

53% 56%

Income

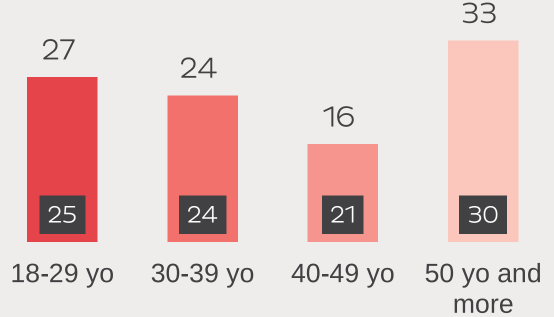
60% 54%

Lower

Age

41.4 y.o

European average 41.2



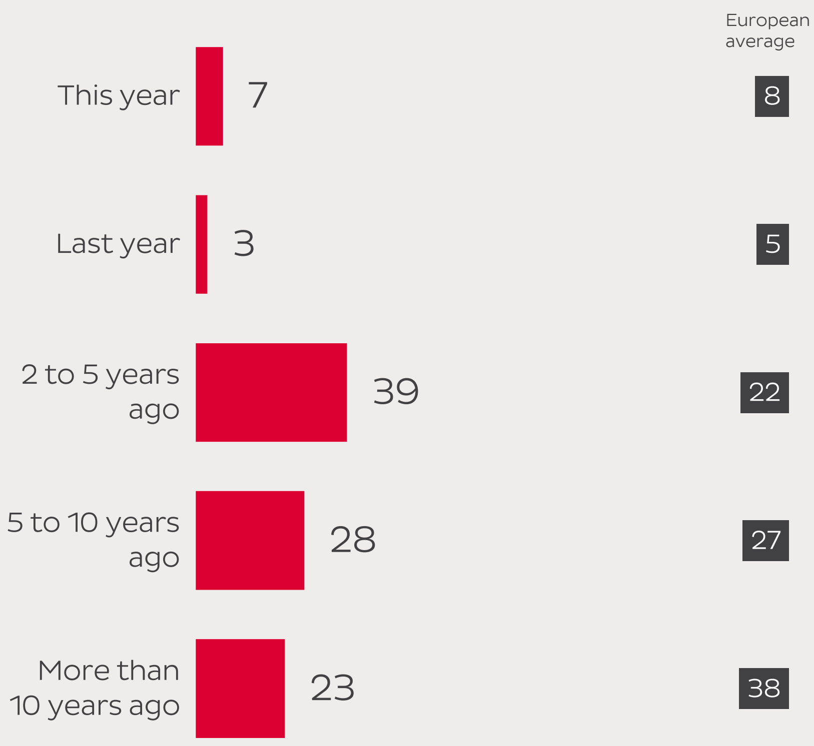
Marital status

		European average
22%	Single	31%
56%	Married	45%
14%	Cohabitation	16%
7%	Divorced	6%

City size

94%+ (86) Urban 88%

% – Started purchasing online ...



N=206
RS1; RS2; RS2RECAP; RSX; S2; C1

XX European average

No comparaison vs. 2021

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

GEOPOST

REGULAR E-SHOPPERS – FOCUS ON OOH USERS

ONLINE PURCHASE HABITS & ATTITUDES

OOH users are heavier e-buyers compared to the average regular e-shoppers, buying more different types of goods and purchasing more than the regulars. They also increase their number of annual purchases vs. 2022

7.2 + (6.3)

European average **6.4**

Different types of goods bought since January on average

Top 7 Categories

		European average
1. Beauty/ Health Care	65%	51%
2. Fashion	64%	59%
3. Shoes	56%	53%
4. Books	48%	47%
5. Medicine	46%	35%
6. High-tech/Electronics	40%	30%
7. Leisure	40% +(32)	38%

Attitudes specificities vs. regular e-shoppers

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

NO SIGNIFICANT GAP VS. REGULAR E-SHOPPERS

49 +8 vs Regular
+7 vs. 2022

Annual number of purchases

European average **44**

/!\ No significance test on median

15.3% 15.9%

Average share of online shopping

(on total shopping – average of all categories)

xx% European average

No comparaison vs. 2021

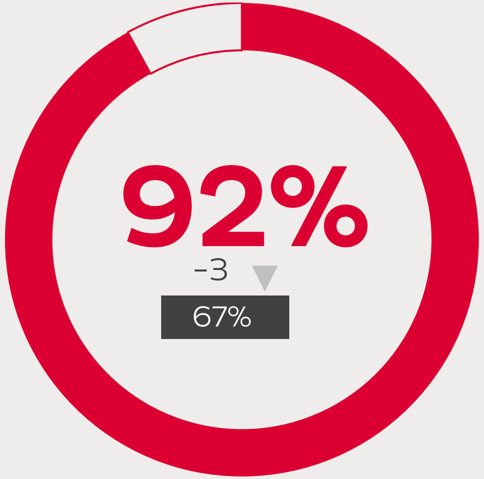
+ − vs. regular e-shoppers (xx) at 95% confidence rate

N=206
A1;A5;SC2;G11

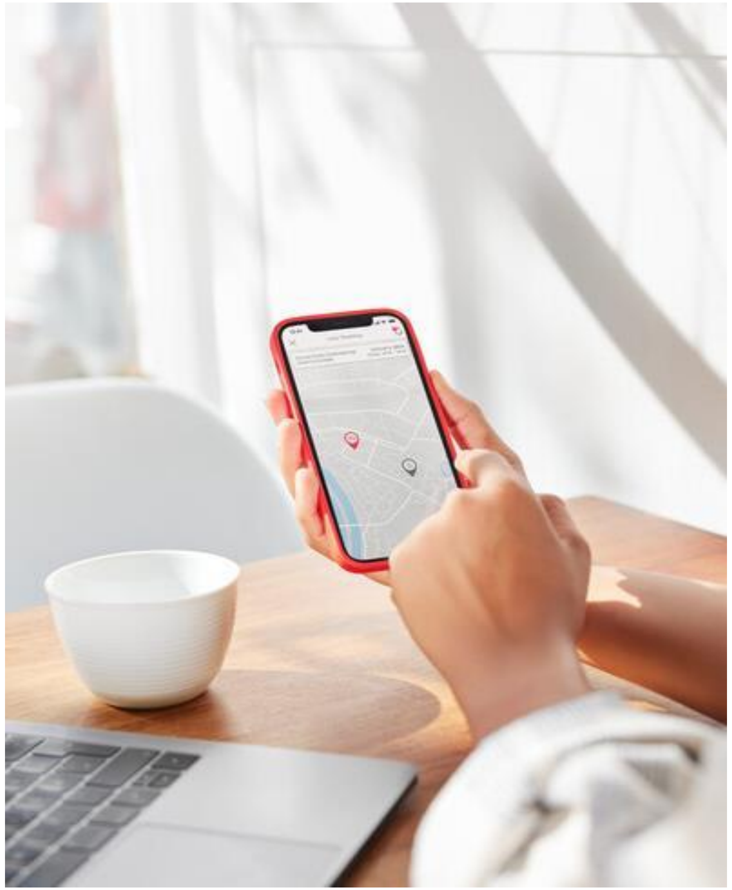
REGULAR E-SHOPPERS

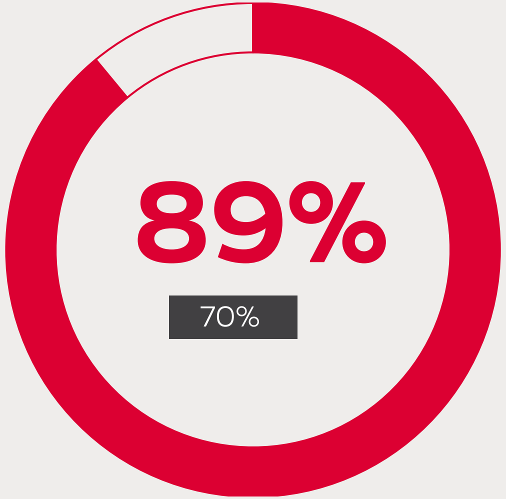
IMPORTANCE OF DELIVERY SERVICES

Delivery services are considered as important to most Romanian regulars: 9 in 10 consider that being informed about the exact 1-hour delivery timeslot and being able to choose the specific day/time of delivery is important while shopping.



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)





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

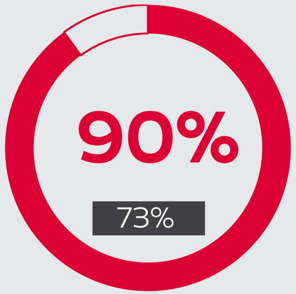
REGULAR E-SHOPPERS

USE OF DELIVERY SERVICES

Almost all Romanian regulars were notified for their last purchase, and 4 in 10 were delivered on a specific day and 1-hour time slot. While less used the delivery within 1 to 2 hours after ordering online vs. 2021.

Delivery services already used-%

Delivery services already used-%



... were notified via email or SMS for their last purchase

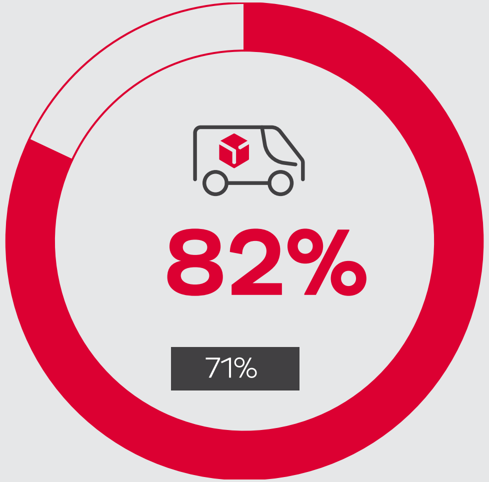
G1 – Have you already used the following delivery services?
D10. On the day of delivery, did you receive an email or SMS notification to indicate you the approximate time your parcel will arrive?

xx% European average

REGULAR E-SHOPPERS

DELIVERY COMPANY

As formerly observed, 4 out of 5 of Romanian regular e-shoppers find it important to know the carrier brand, mainly for ease-of-mind (reassuring / preferences) and for the services provided.



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

Reasons of importance to know the delivery company % (n = 444)

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

GREEN DELIVERY ALTERNATIVES

Offering green delivery options would interest more than 60% of regular e-shoppers and 80% consider that it could help to opt for a retailer having such options. Overtime, OOH delivery benefits from a greener image.

65%
-7 ▼

58%

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

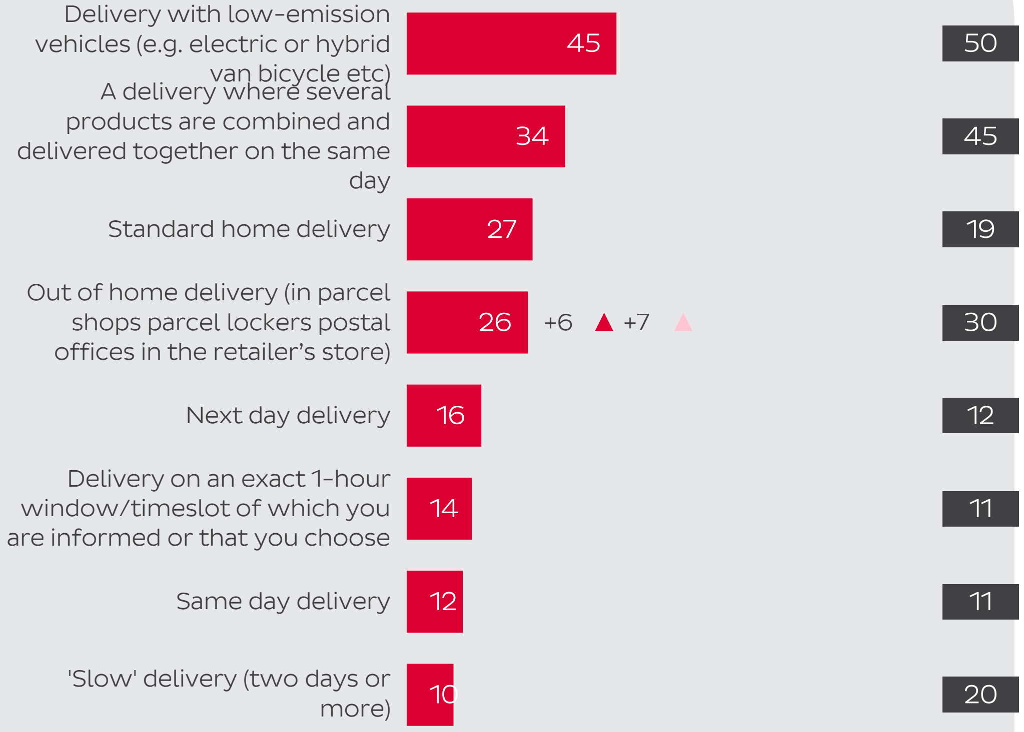
95% *for transparent/complete delivery costs*
91% *for free delivery*
83% *for various options of place of delivery*

82%

64%

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

Delivery options perceived as environmentally friendly – %



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

EFFORT AND SATISFACTION VS. ONLINE PURCHASE

In 2023, there is a slight downward trend in satisfaction about delivery and last online purchase. Yet, the levels of satisfaction remains very high, and the overall purchase experience is very satisfying as well.

% - Delivery effort

... found the delivery easy/ effortless

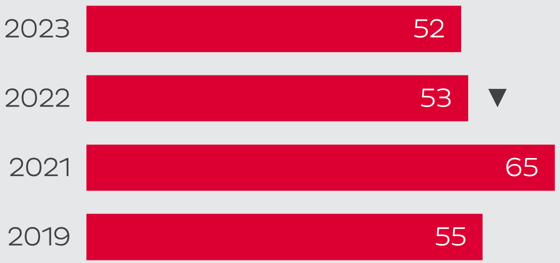
72%

% - Last online purchase effort

... consider their last online purchase as easy

71%

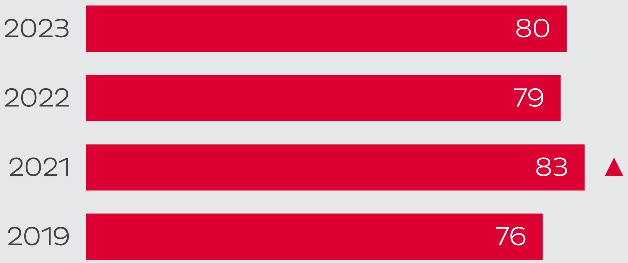
% - Return effort



... found the return process easy/ effortless

55%

% - Rating of last online purchase experience



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

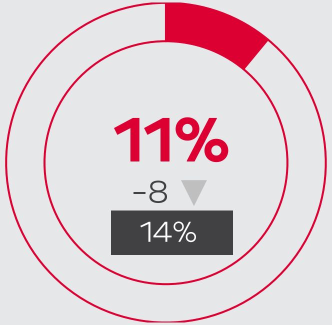
78%

xx% European average

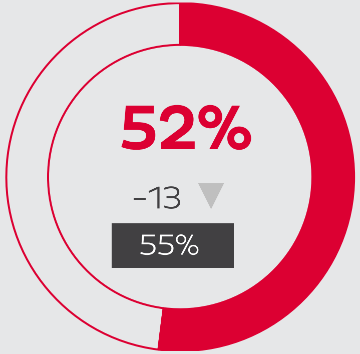
▲▼ Significant increase/ decrease vs. previous year

RETURNS

11% of Romanian regulars returned their last purchase, less than in 2021. Among them, half find their return easy, lower share than in the past. The main return method is using a carrier that picks up the parcel at home.



… returned their last purchase



… Found it easy/effortless (n = 223)

Top 3 Return Methods (n = 223)

53%	Carrier picking it up at home	23%
18%	Dropping it off at a parcel shop	34%
15%	Dropping it off at a parcel locker station	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)?

XX% European average

ZOOM ON THE AFICIONADOS

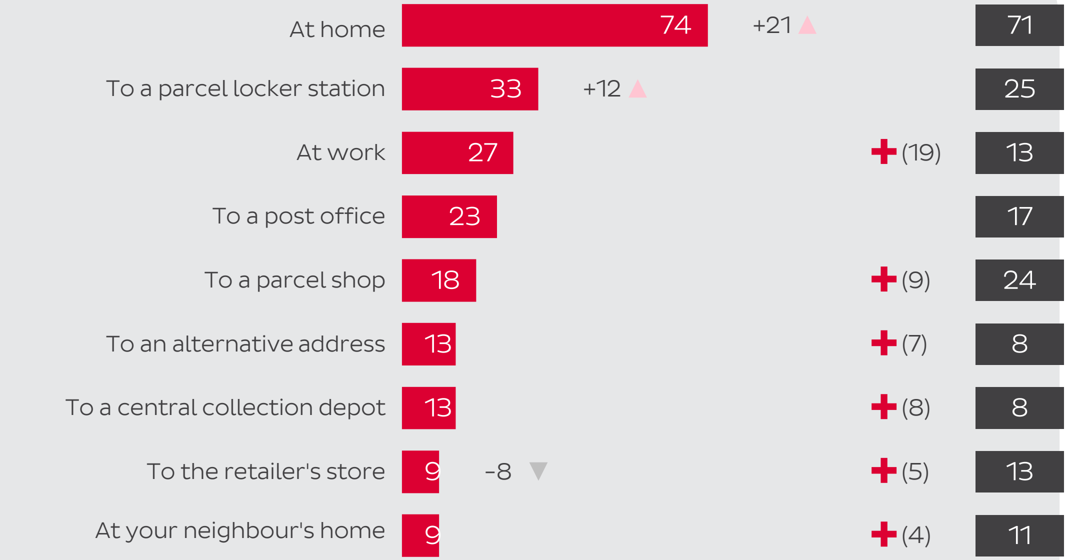
The Aficionados use a wider set of delivery places than regular e-shoppers. They keep having a positive experience with the online purchase overall, and in trend their perception of delivery is back on a positive track, unlike the regulars.

ZOOM ON THE AFICIONADOS

DELIVERY PREFERENCES

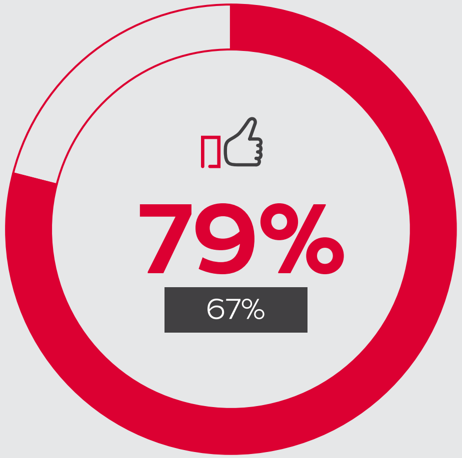
Aficionados use a bit more delivery places than the regulars, more of them using most OOH delivery, except parcel lockers and post office delivery. They are getting more delivered at home and at a locker station compared to 2021.

Usual delivery places-%



At home	74	+21 ▲		71
To a parcel locker station	33	+12 ▲		25
At work	27		+ (19)	13
To a post office	23			17
To a parcel shop	18		+ (9)	24
To an alternative address	13		+ (7)	8
To a central collection depot	13		+ (8)	8
To the retailer's store	9	-8 ▼	+ (5)	13
At your neighbour's home	9		+ (4)	11

2.2 + (1.8) 2.1 Delivery places on average



79% 67%

... found delivery easy/effortless

59% + (48) 56%

Usually use more than one delivery place

43% 46%

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

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?

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

XX European average

EFFORT AND SATISFACTION VS. ONLINE PURCHASE

Aficionados keep having a very positive experience with the online purchase and delivery, and in trend their perception of their online purchase experience is back on a positive track. Return easiness is more critical.

% – Delivery effort

… found the delivery easy/ effortless

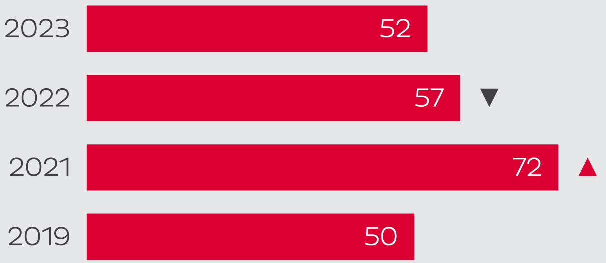
67%

% – Last online purchase effort

… consider their last online purchase as easy

64%

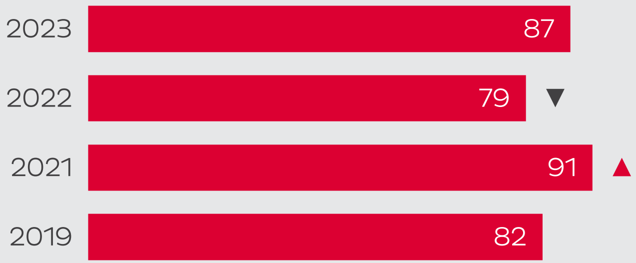
% – Return effort



… found the return process easy/ effortless

49%

% – Rating of last online purchase experience



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

81%

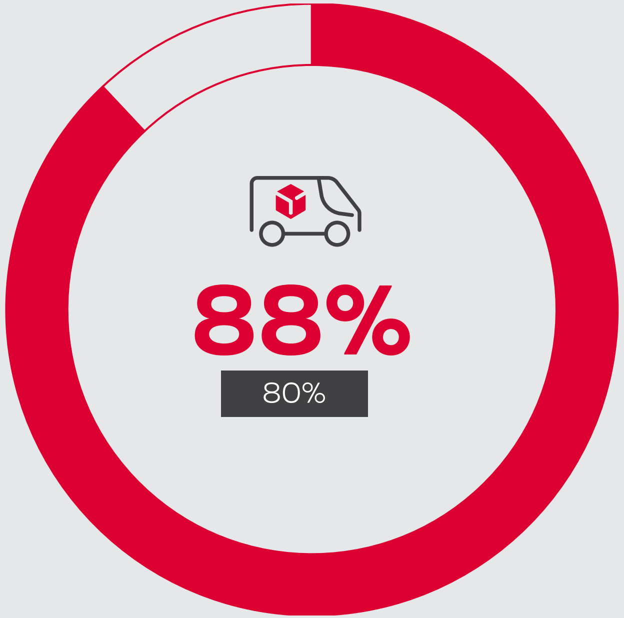
✚ ▬ vs. regular e-shoppers at 95% confidence rate

▲▼ Significant increase/ decrease vs. previous year

ZOOM ON THE AFICIONADOS

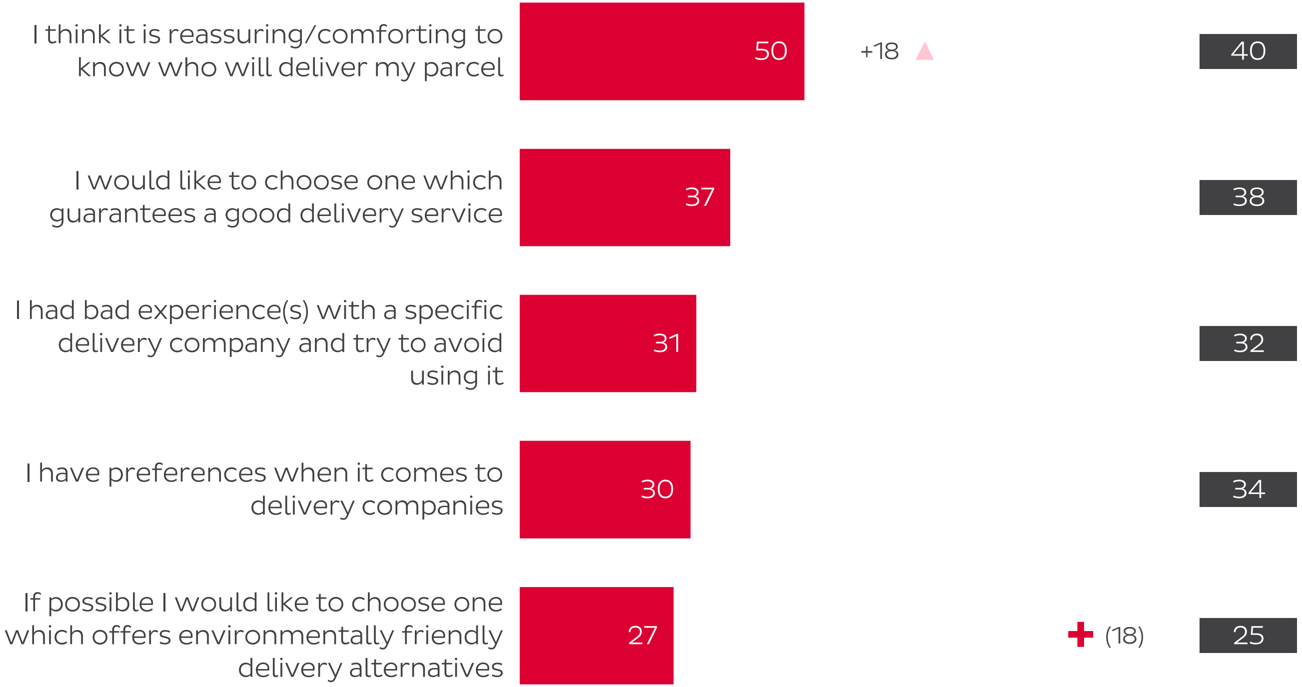
DELIVERY COMPANY

Knowing the delivery company remains important to most of Romanian Aficionados, for the similar reasons as for the regular e-shoppers: reassuring / preventing from bad experiences, and related services.



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

Reasons of importance to know the delivery company % (n = 133)



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

GEOPOST