

# E-commerce in Romania 2020



**eMAG** Marketplace

 **GEMIOUS**

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# **E-commerce in Romania 2020: before Covid-19**







## Methodology:

The study was conducted by an online survey in POP-UP format, which was shown to randomly selected Internet users.

Survey questionnaire consists of 41 question (35 key survey questions and 6 socio-demographic questions).

Data weighted with structural data by gender, age and education.

Sample (N) – actual number of respondents of the questionnaire.

## Target group:

Internet users in Romania aged from 14 to 74 years

## Period:

5 February - 16 March, 2020

## Sample:

N=1691





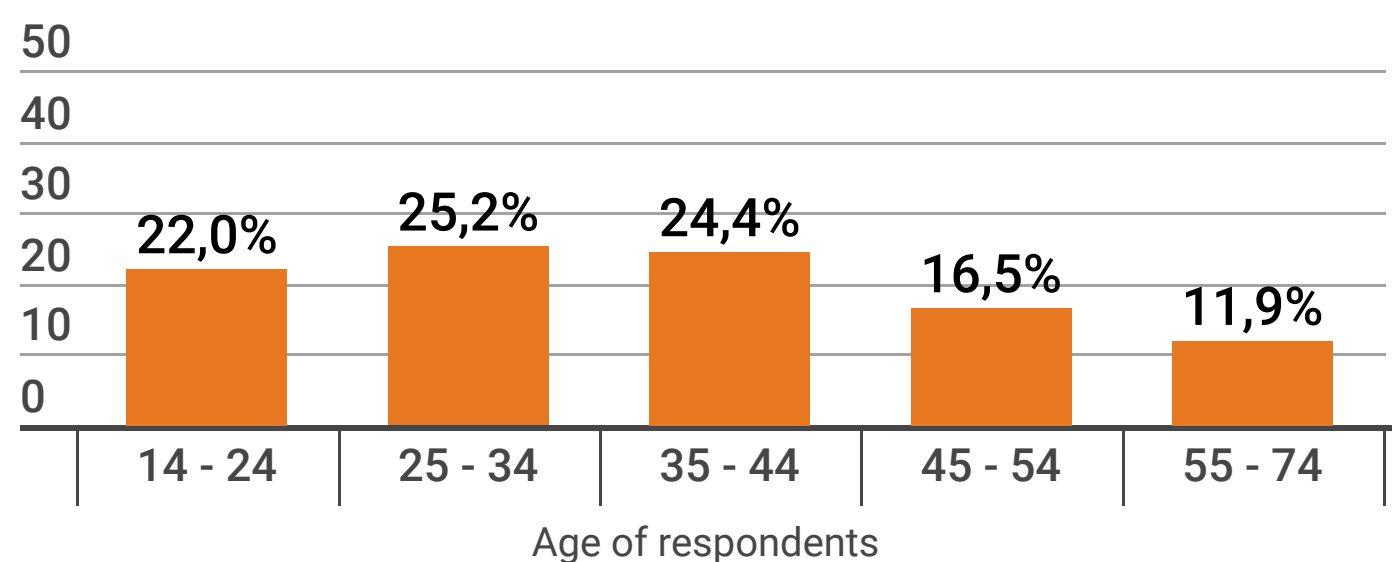
# Socio-demographic profile



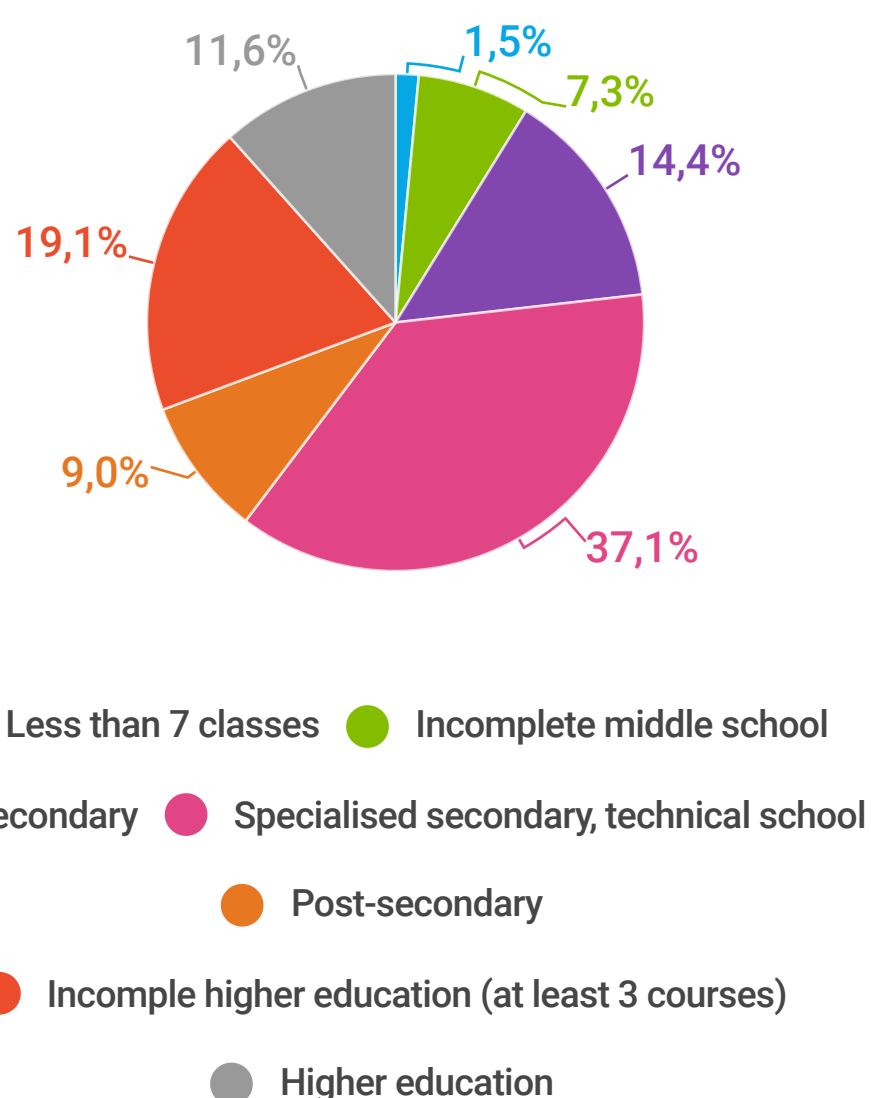
52,2 %



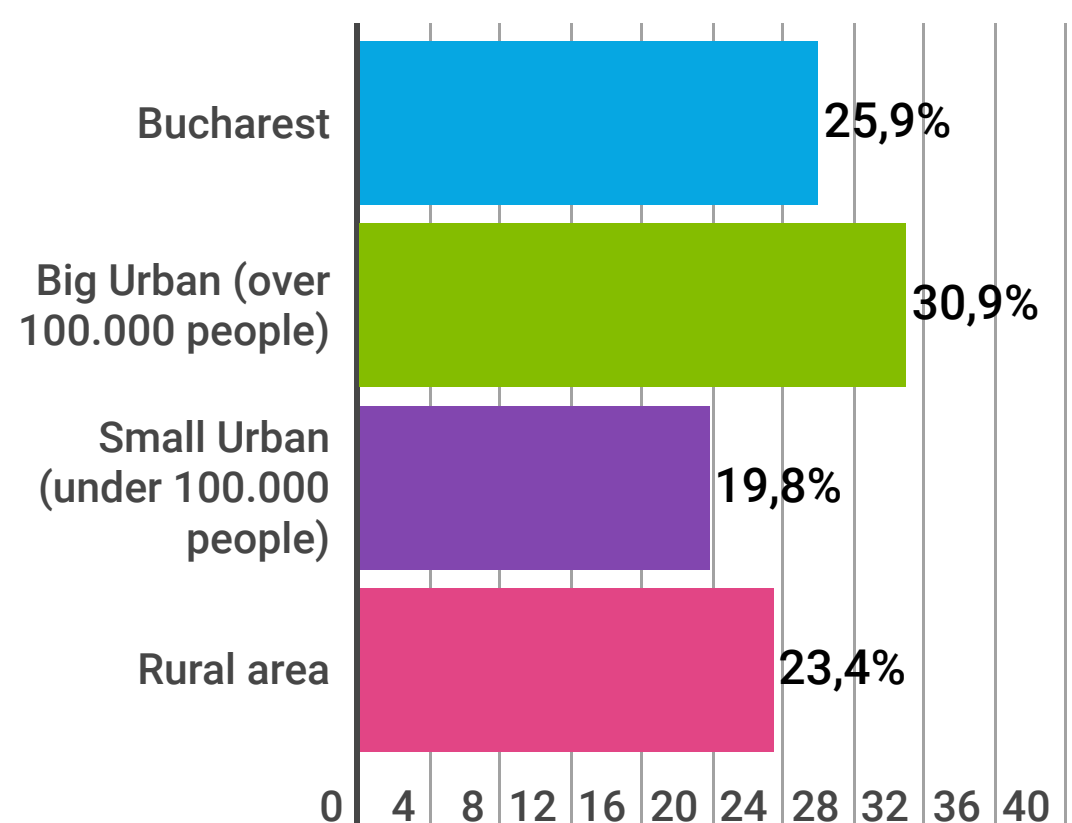
47,8 %



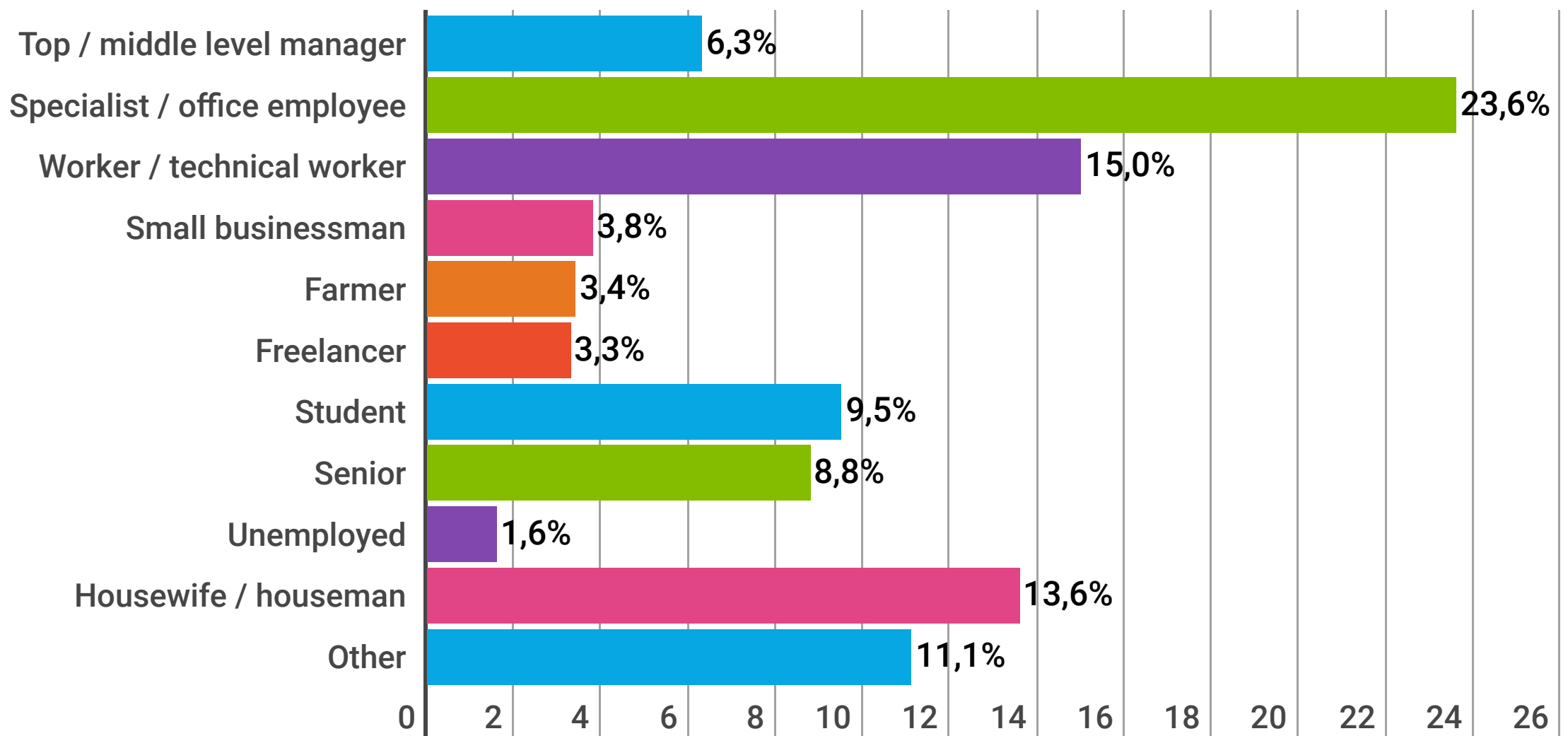
## Education



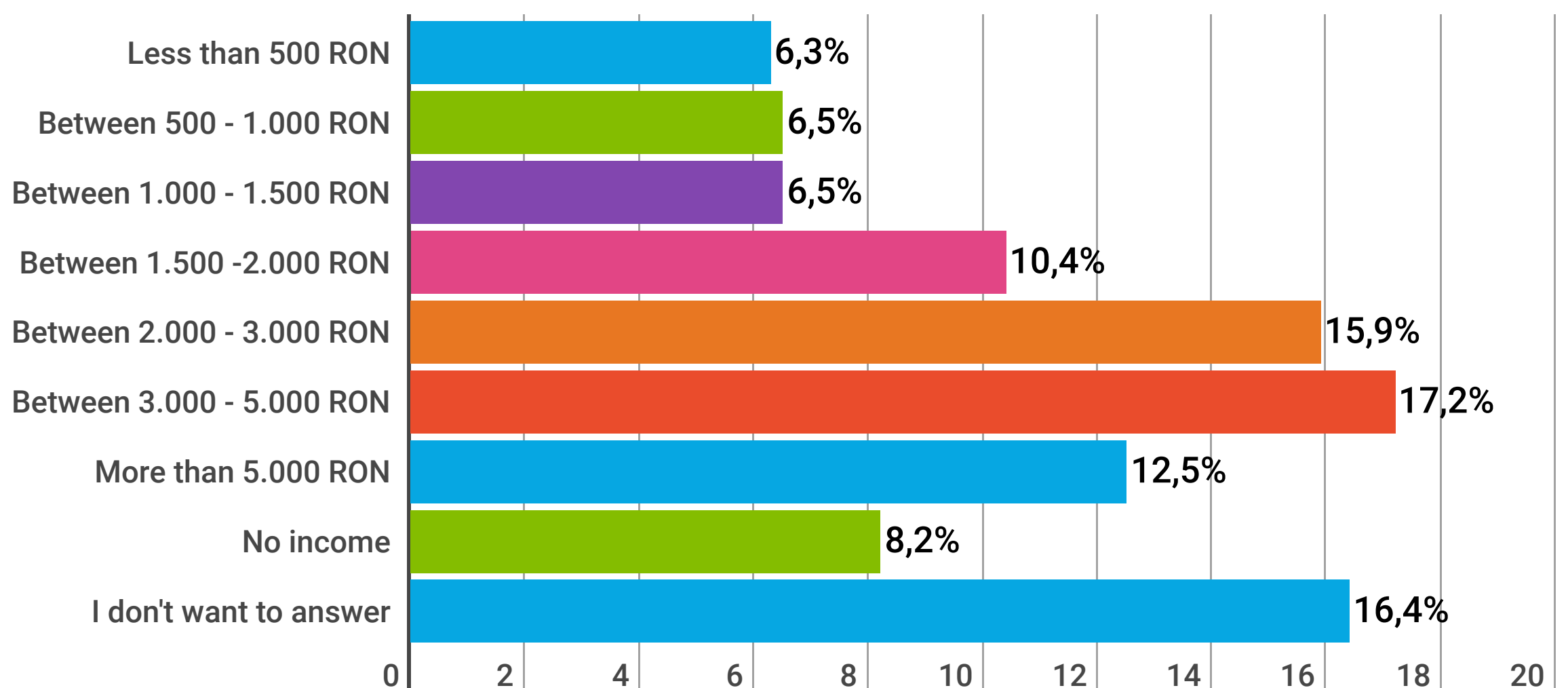
## Place of living



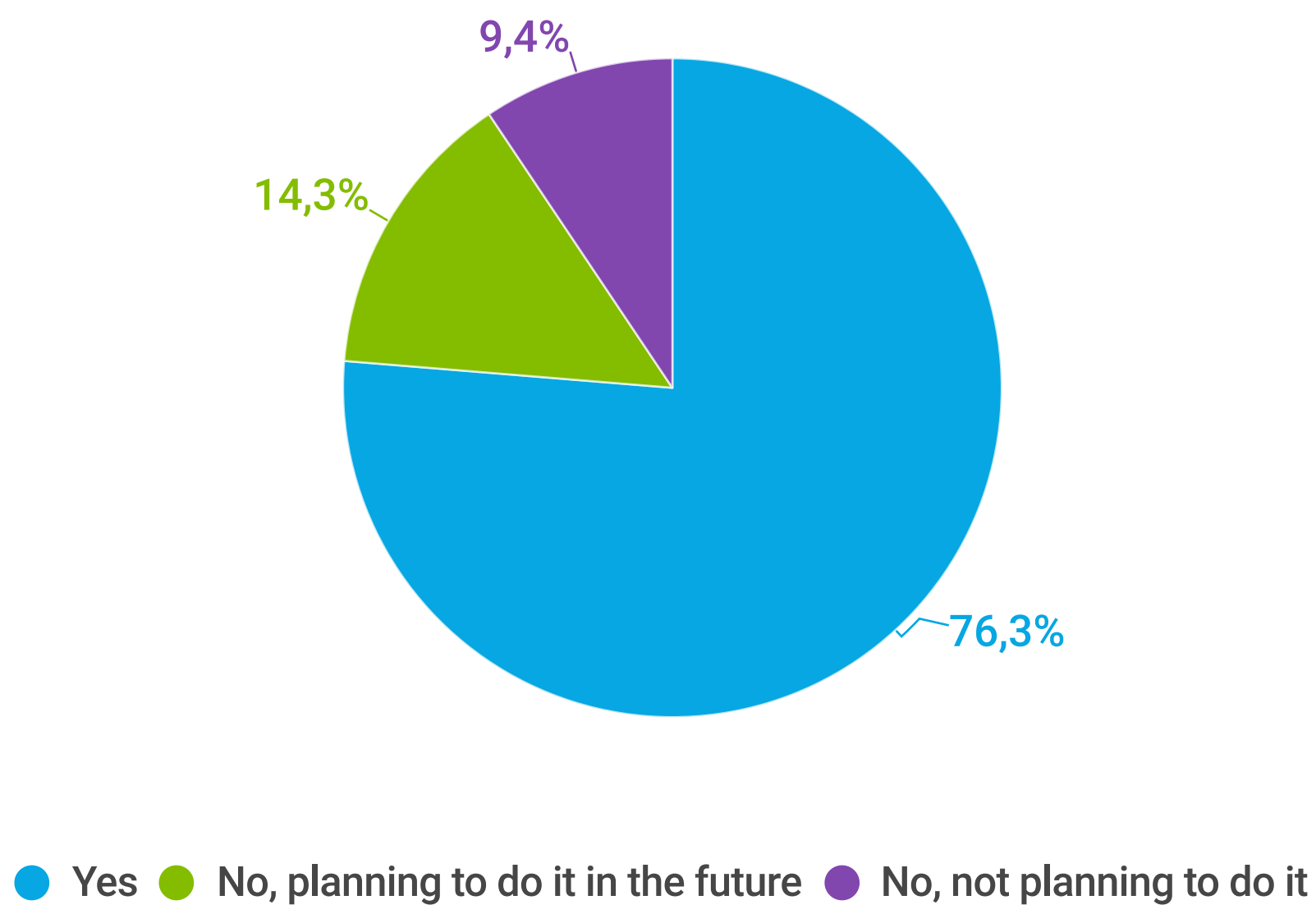
## Current employment status



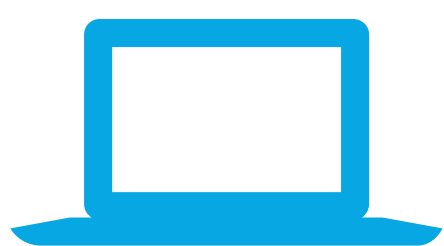
## Average net income



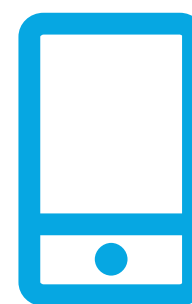
## Have you made any purchase online?



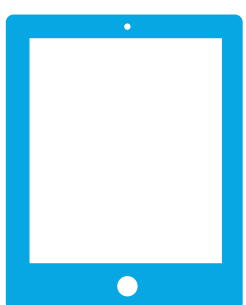
## The inhabitants of Romania who shop on the internet, from them...



89,6% from  
computer



70,2% from  
mobile phone



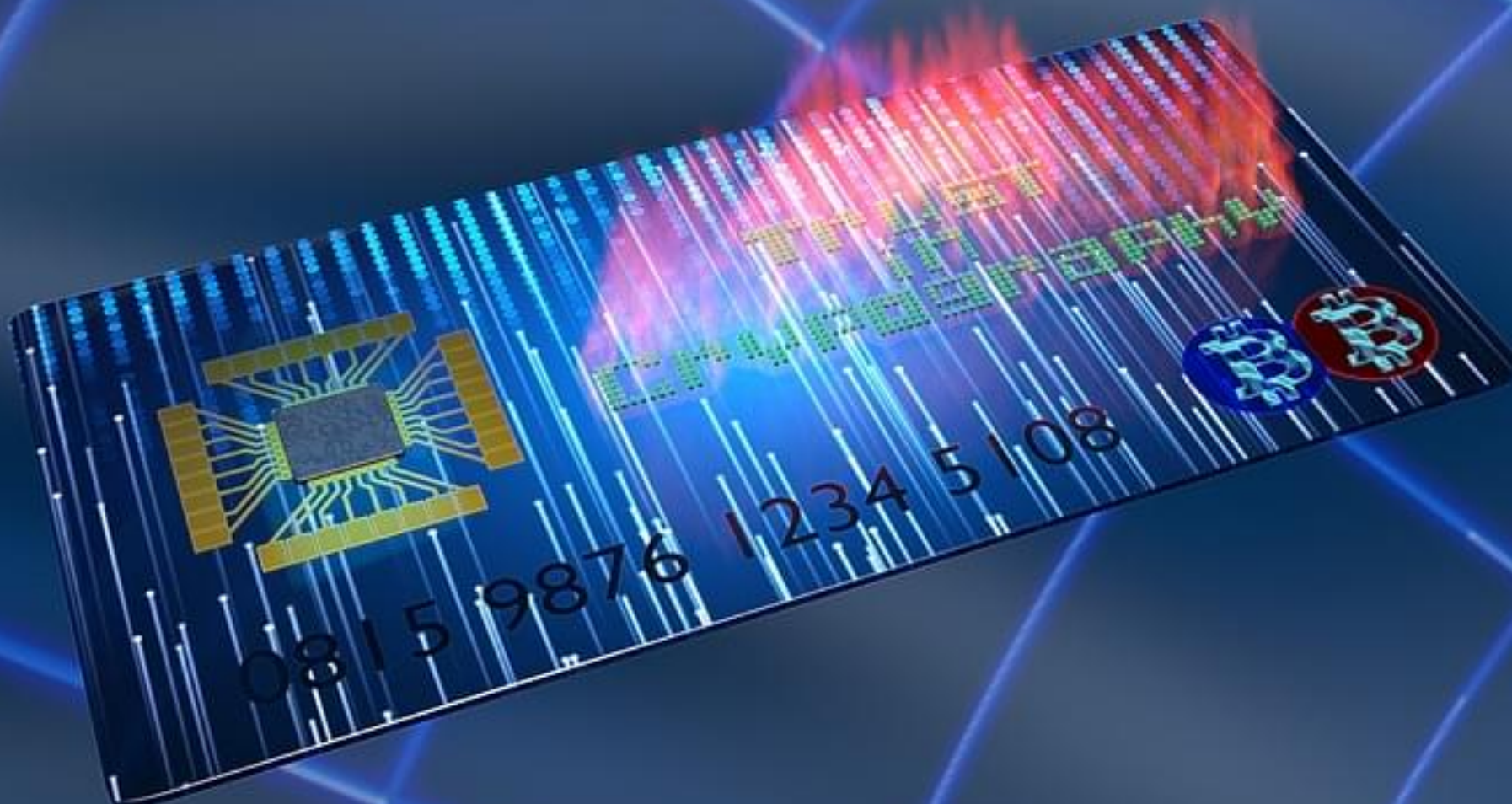
9,5% from tablet



9,2% from TV

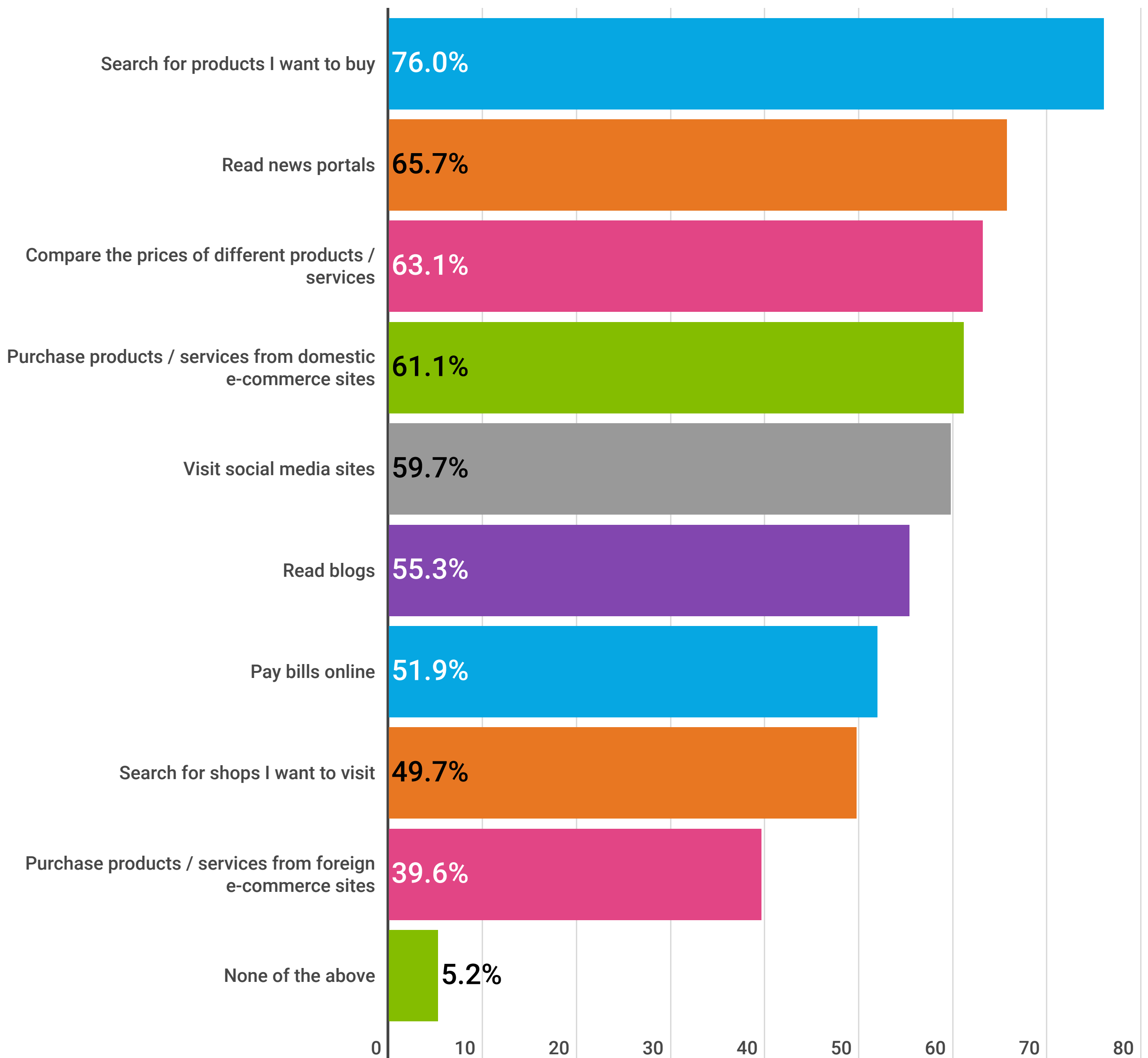


# Overview of online activities

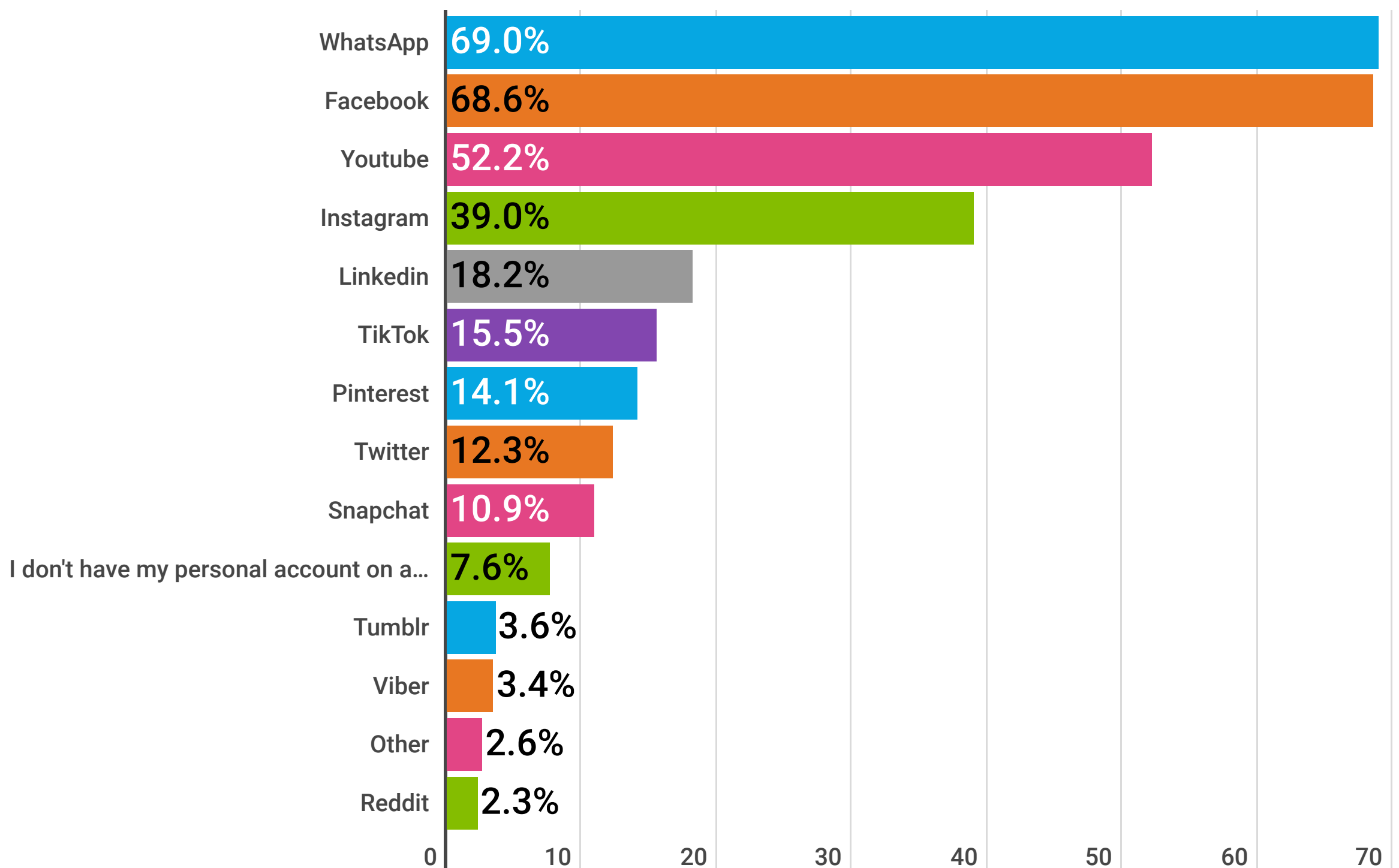




## Which of the mentioned activities you do online?



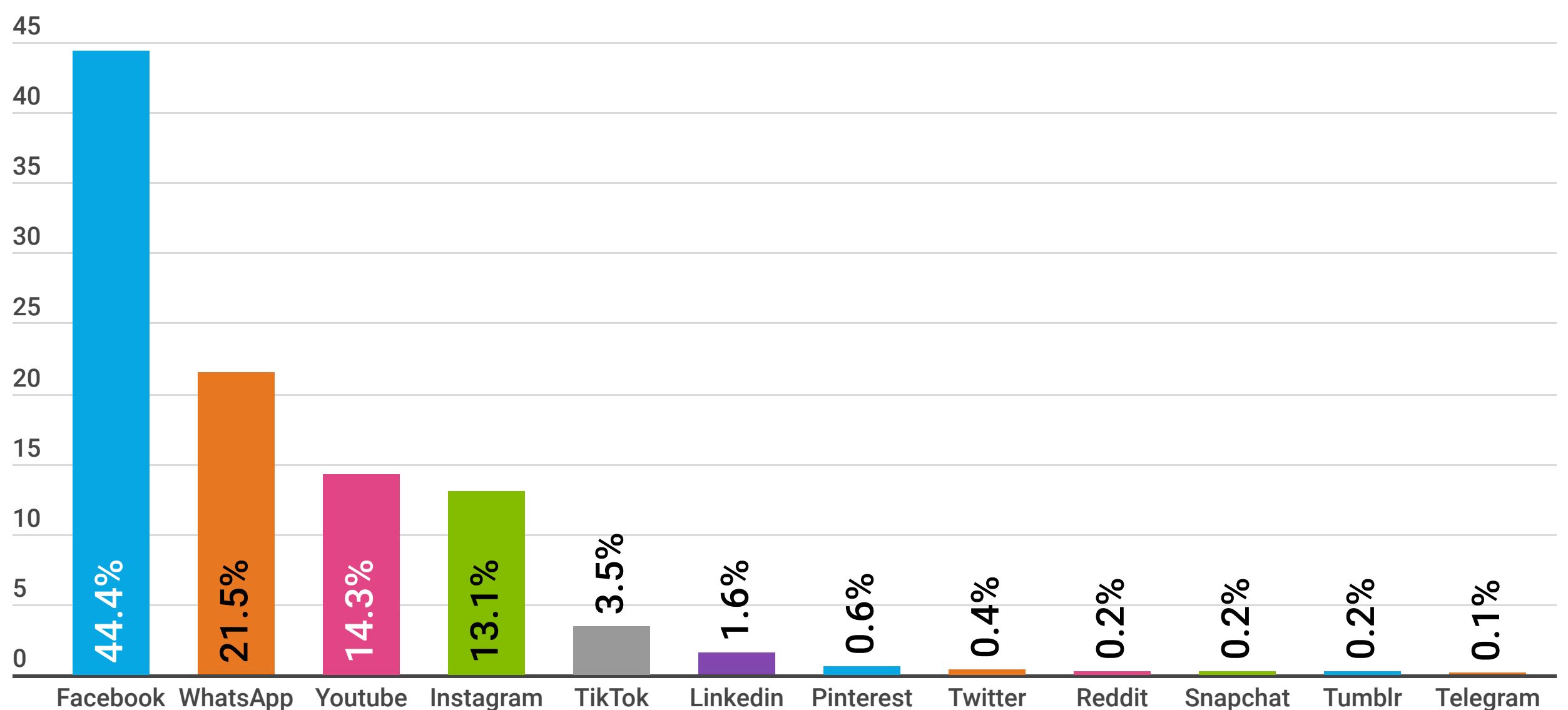
## On which social media sites you are an active user?



Source: gemiusAdHoc research, February 2020

N= 1691

## Which of social media sites where you have a personal account are you visiting the most often?

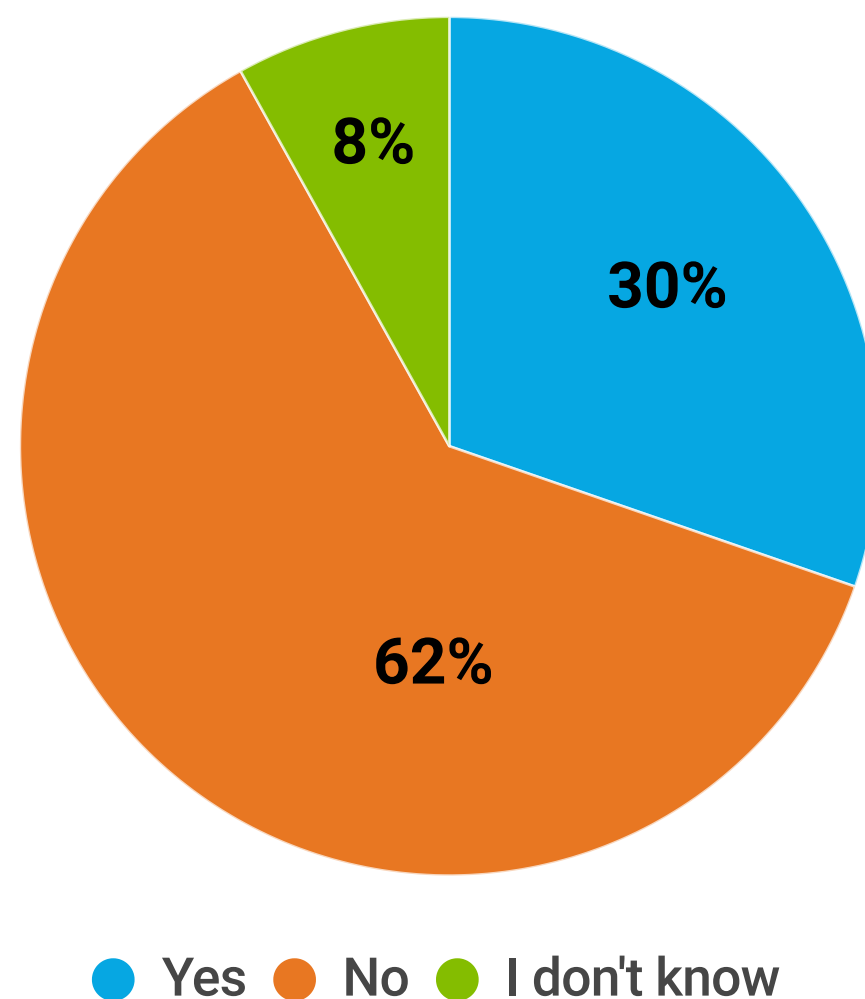


Source: gemiusAdHoc research, February 2020

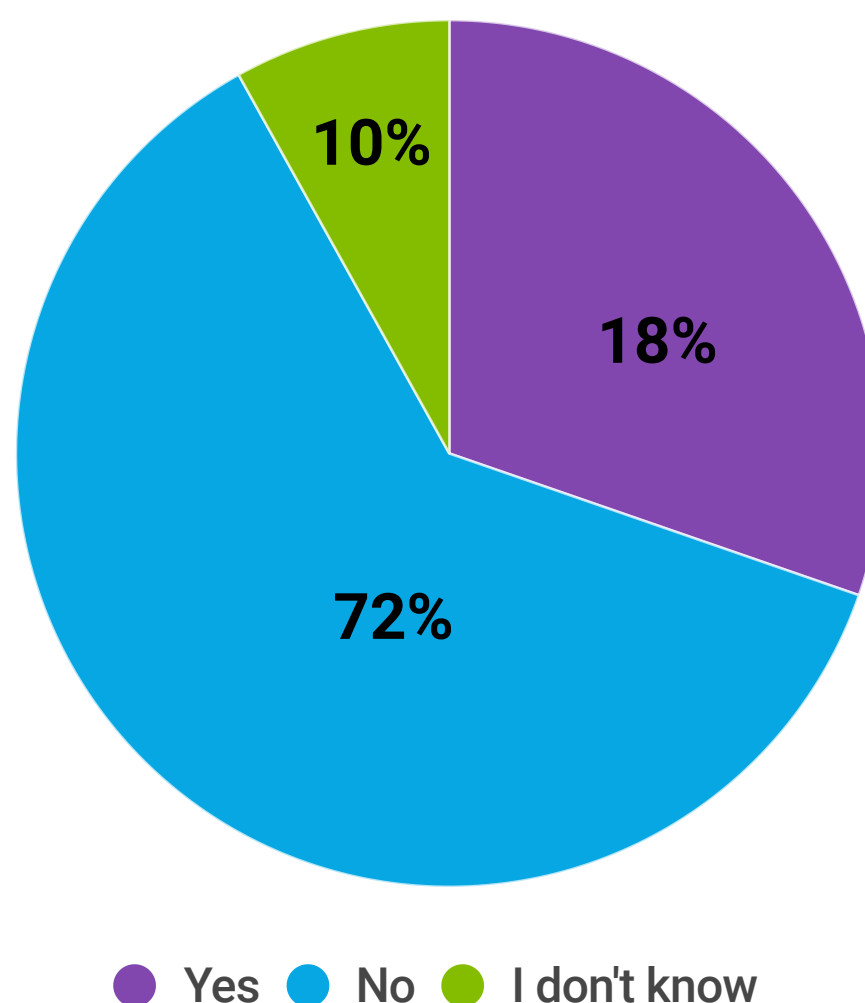
N= 1546



## Are you following Romanian influencer\* accounts on social media sites?



## Have you ever bought a product / ordered a service because it was recommended by an influencer\*?

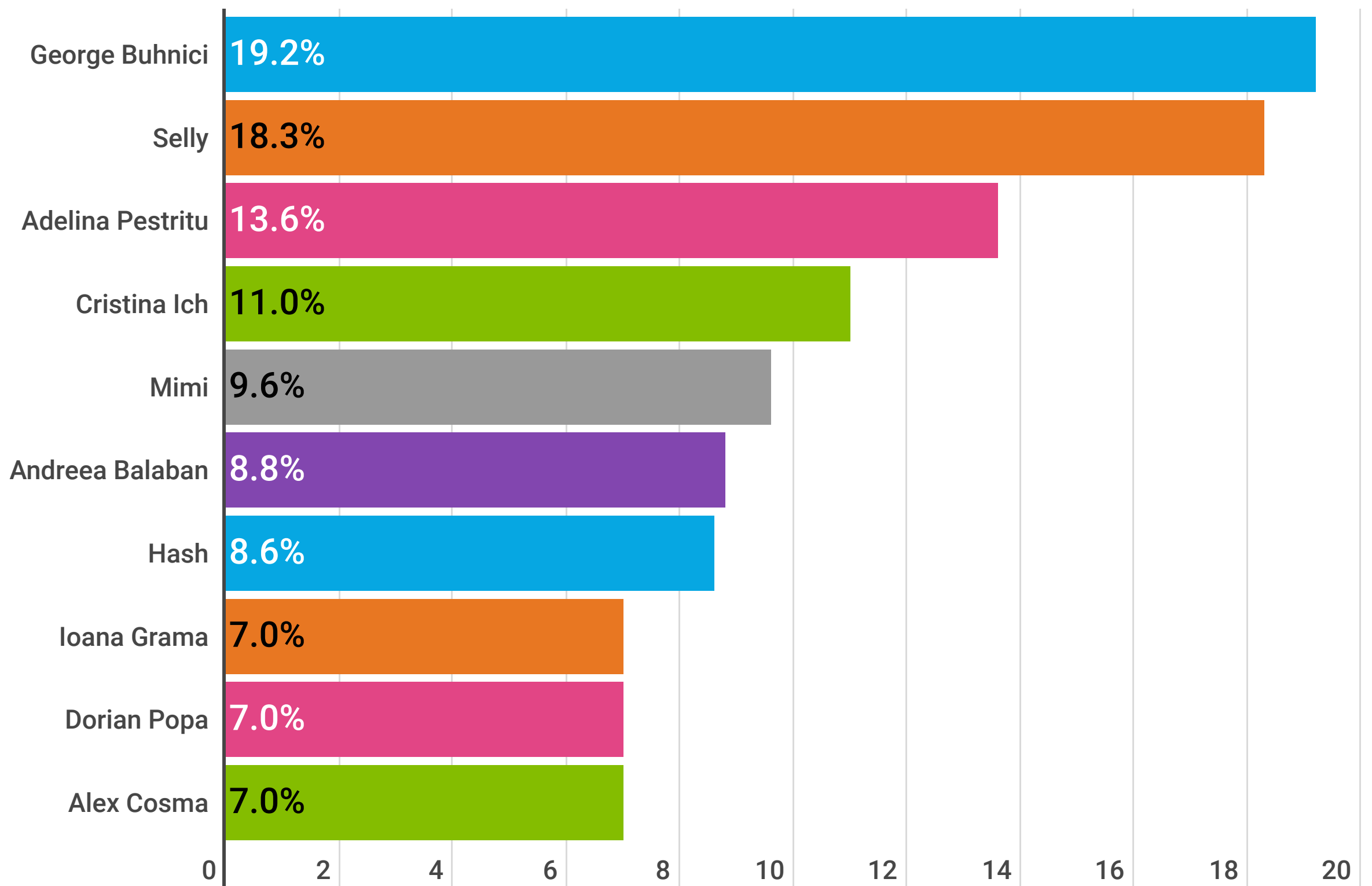


\*Influencer - the person who forms opinions on certain products, brands, or events

Source: gemiusAdHoc research, February 2020

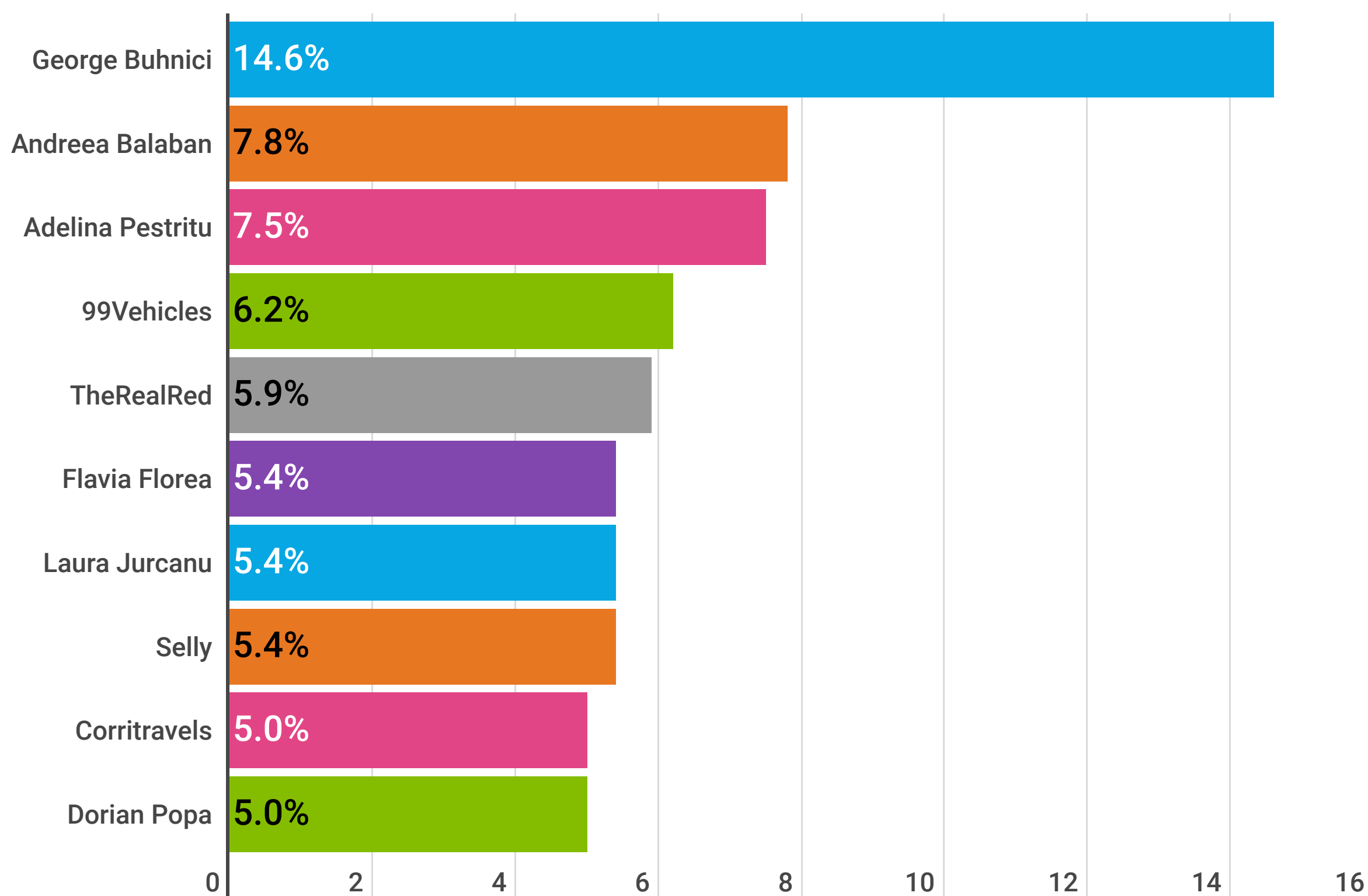
N= 1691

## TOP 10 Romanian influencers respondents know / have heard of





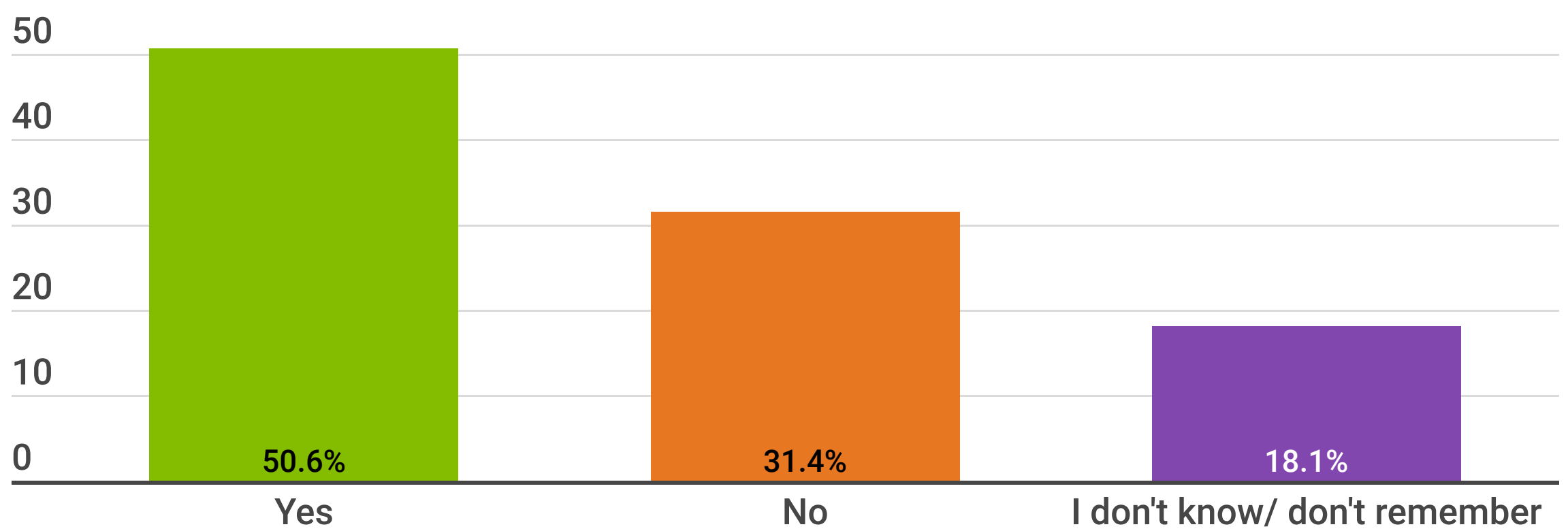
## TOP 10: In which Romanian influencer's recommendations you have the highest trust?



Source: gemiusAdHoc research, February 2020

N= 228

## Have you ever bought a product / ordered a service after you saw the advertisement online?

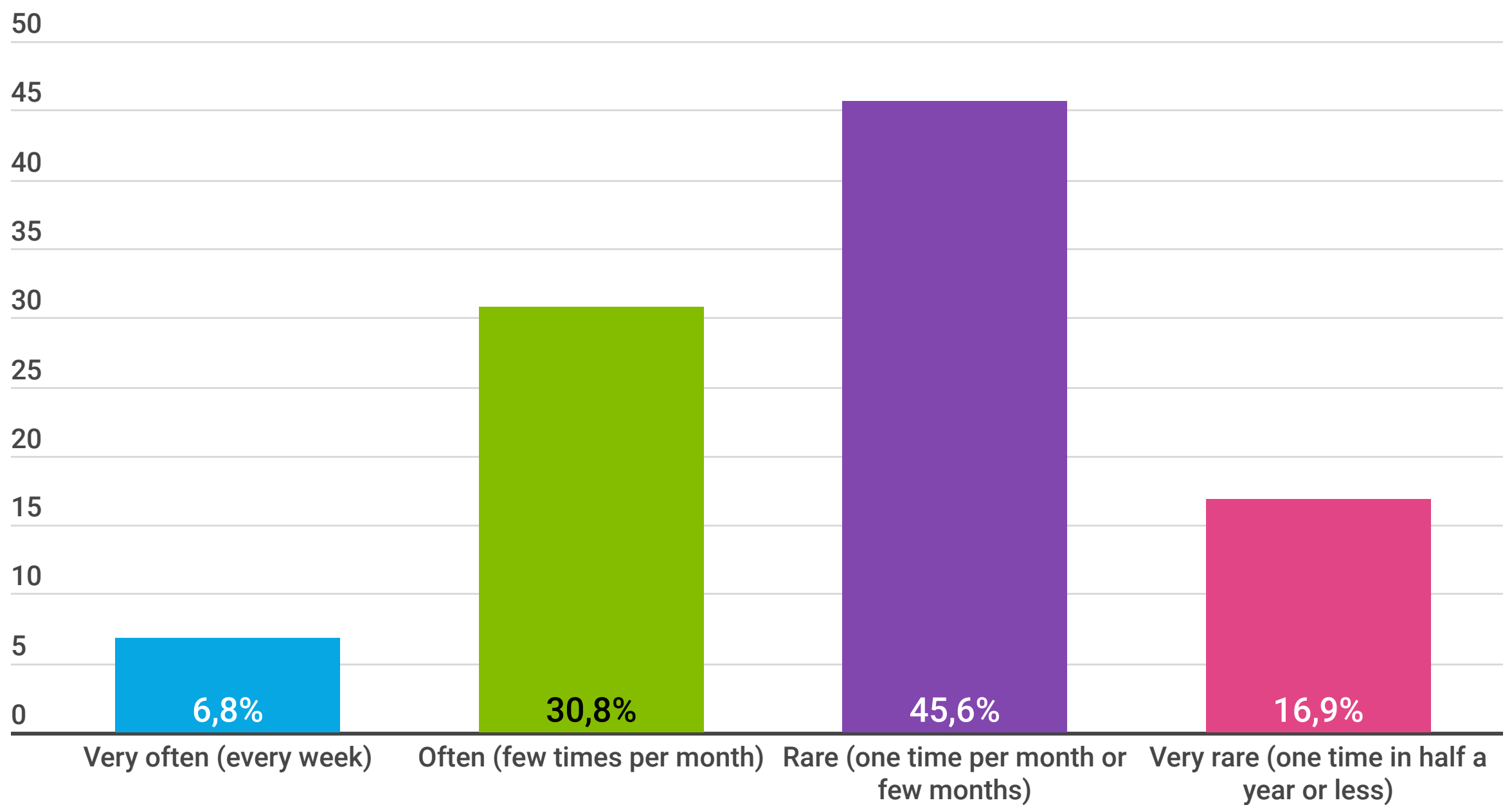




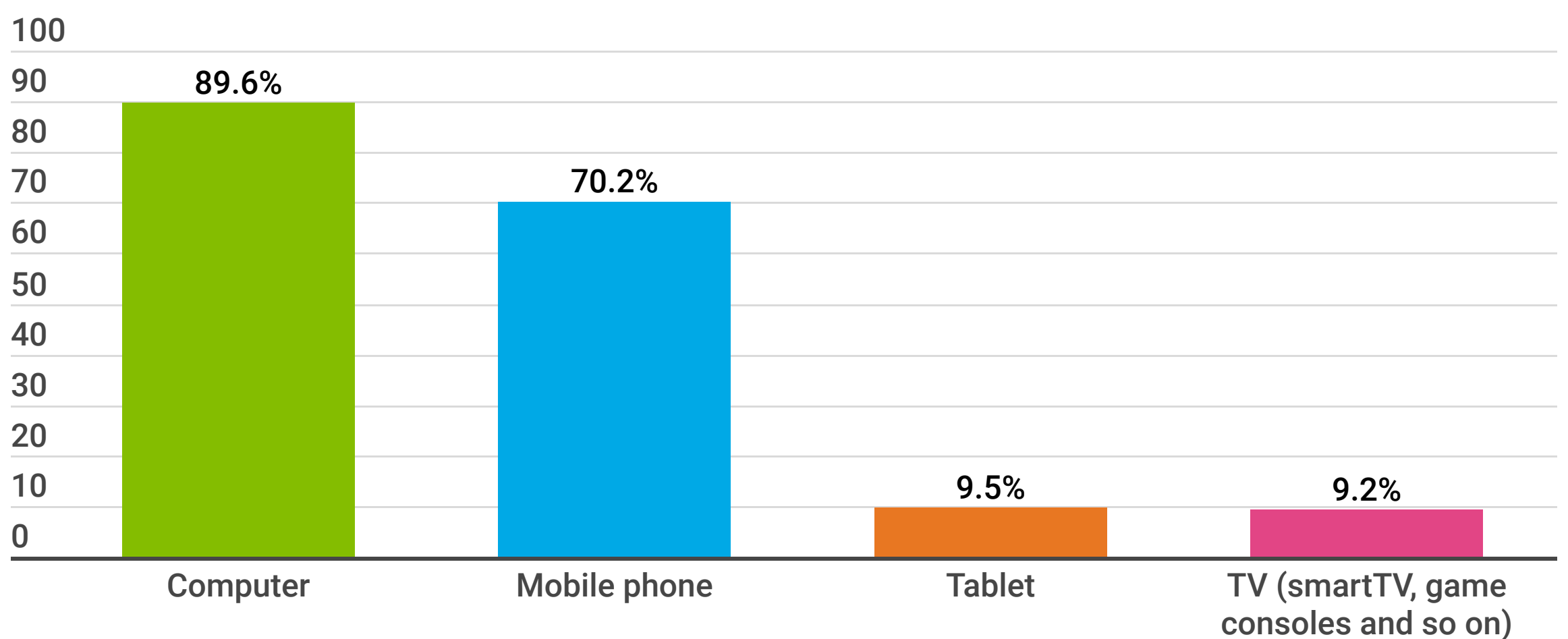
# Analysis of respondents who shop online



## How often do you purchase online?



## What devices do you use to shop online?



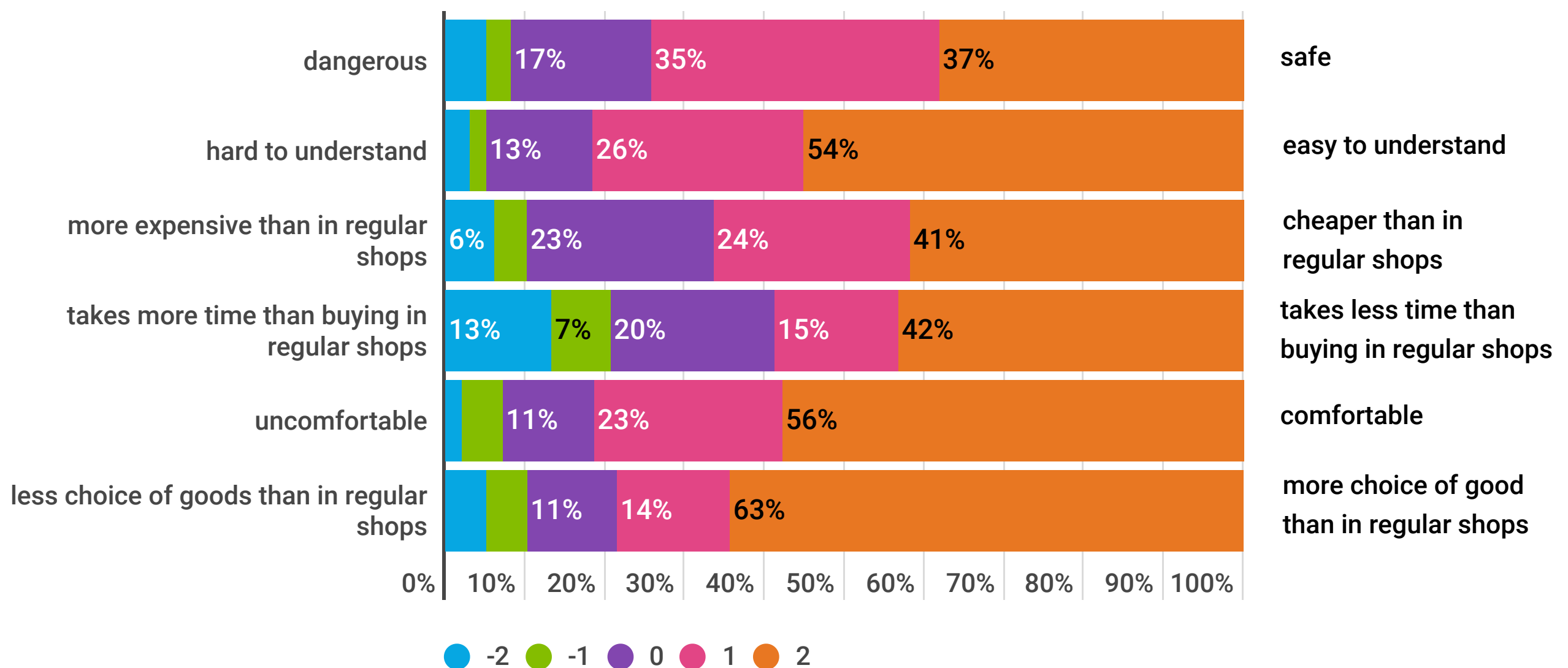
Source: gemiusAdHoc research, February 2020

N= 1290

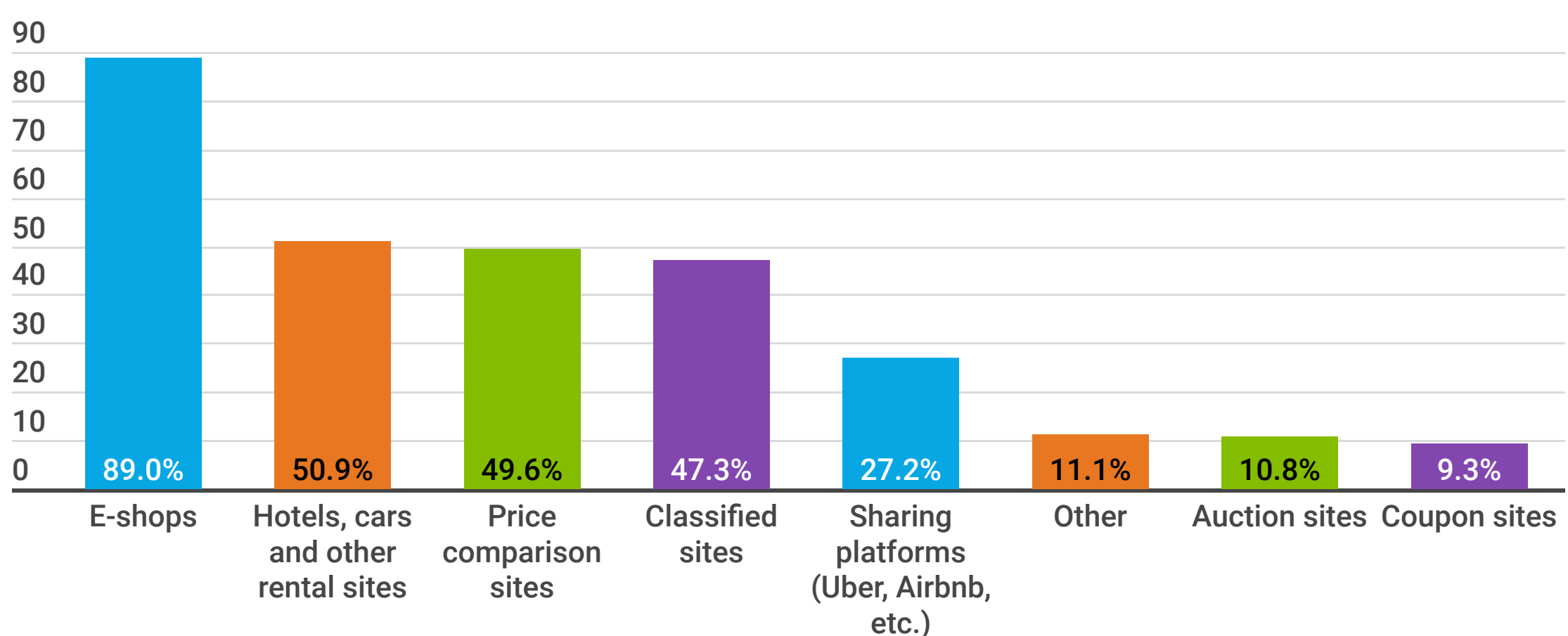


## Please apprise buying online

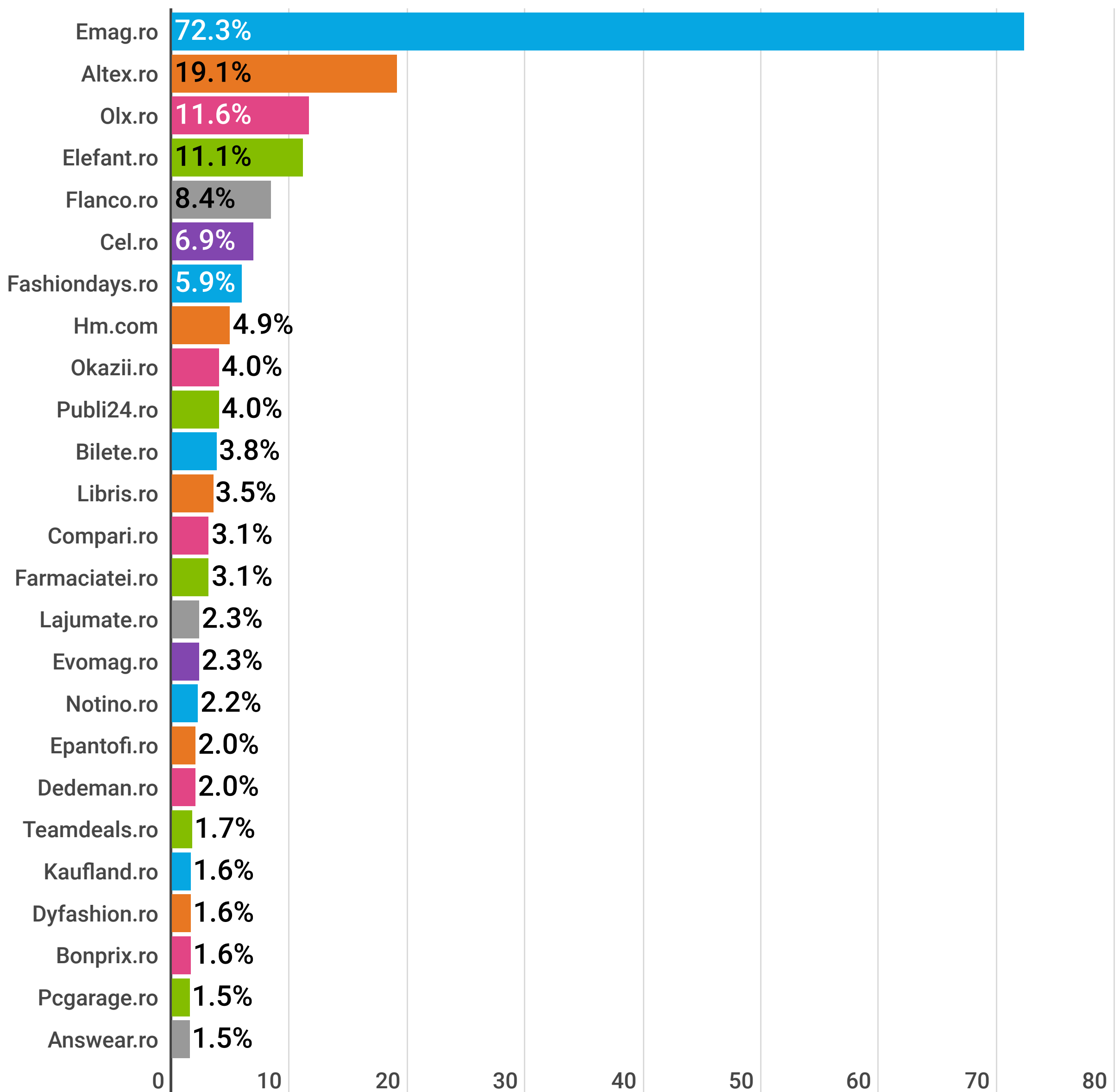
(where -2 means that you approve with what is written in the left side, +2 mean that you approve with what is written in the right)



## Please indicate of the following types of e-commerce sites the ones that you have personally used



## TOP 25 Romanian e-commerce sites



Source: gemiusAdHoc research, February 2020

N= 1128





Susține dezvoltarea  
IMM-urilor din România  
și adaptarea la  
economia digitală.

Fulfilment by **eMAG**

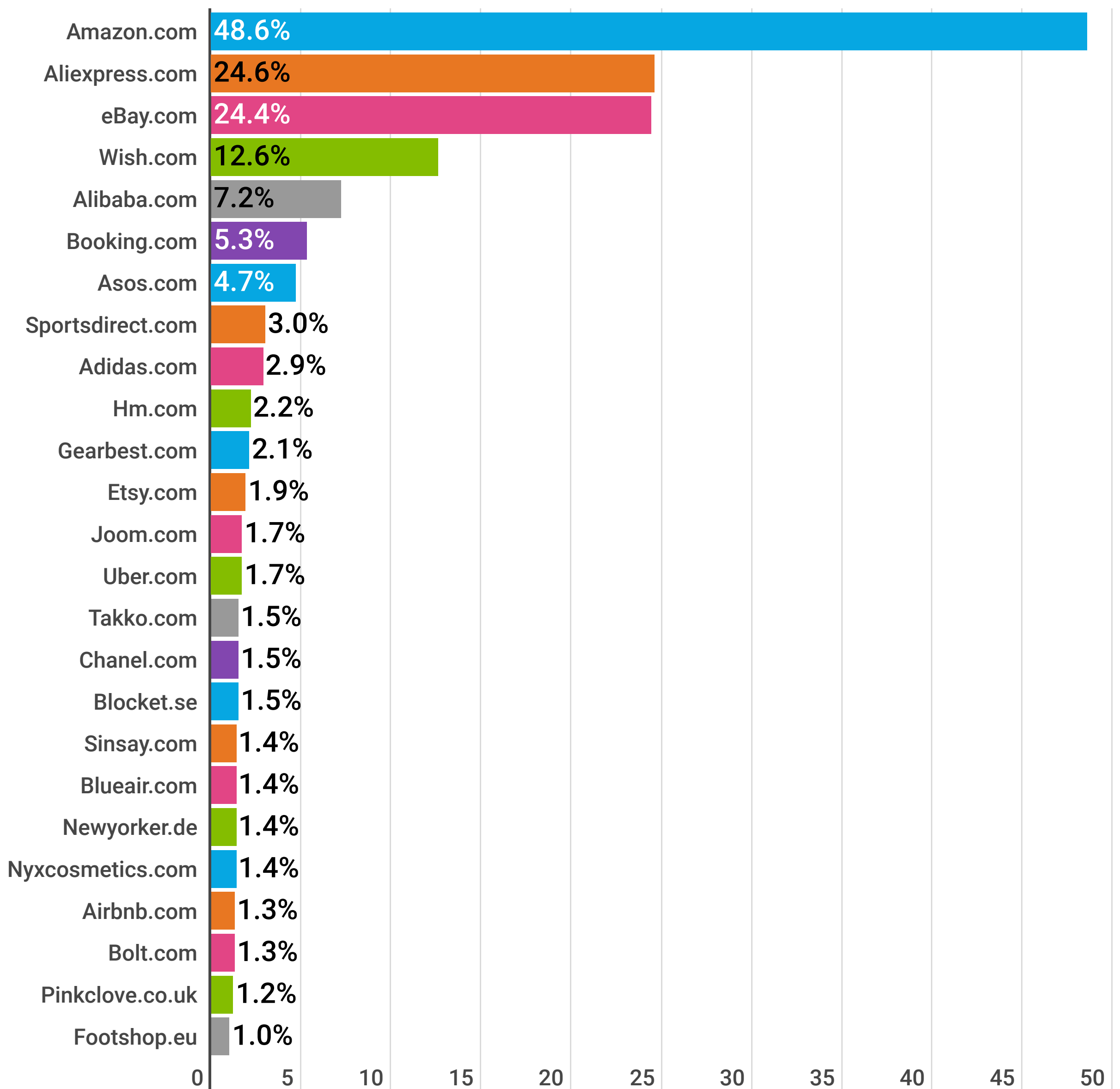
**eMAG** **genius**



[www.marketplace.emag.ro](http://www.marketplace.emag.ro)



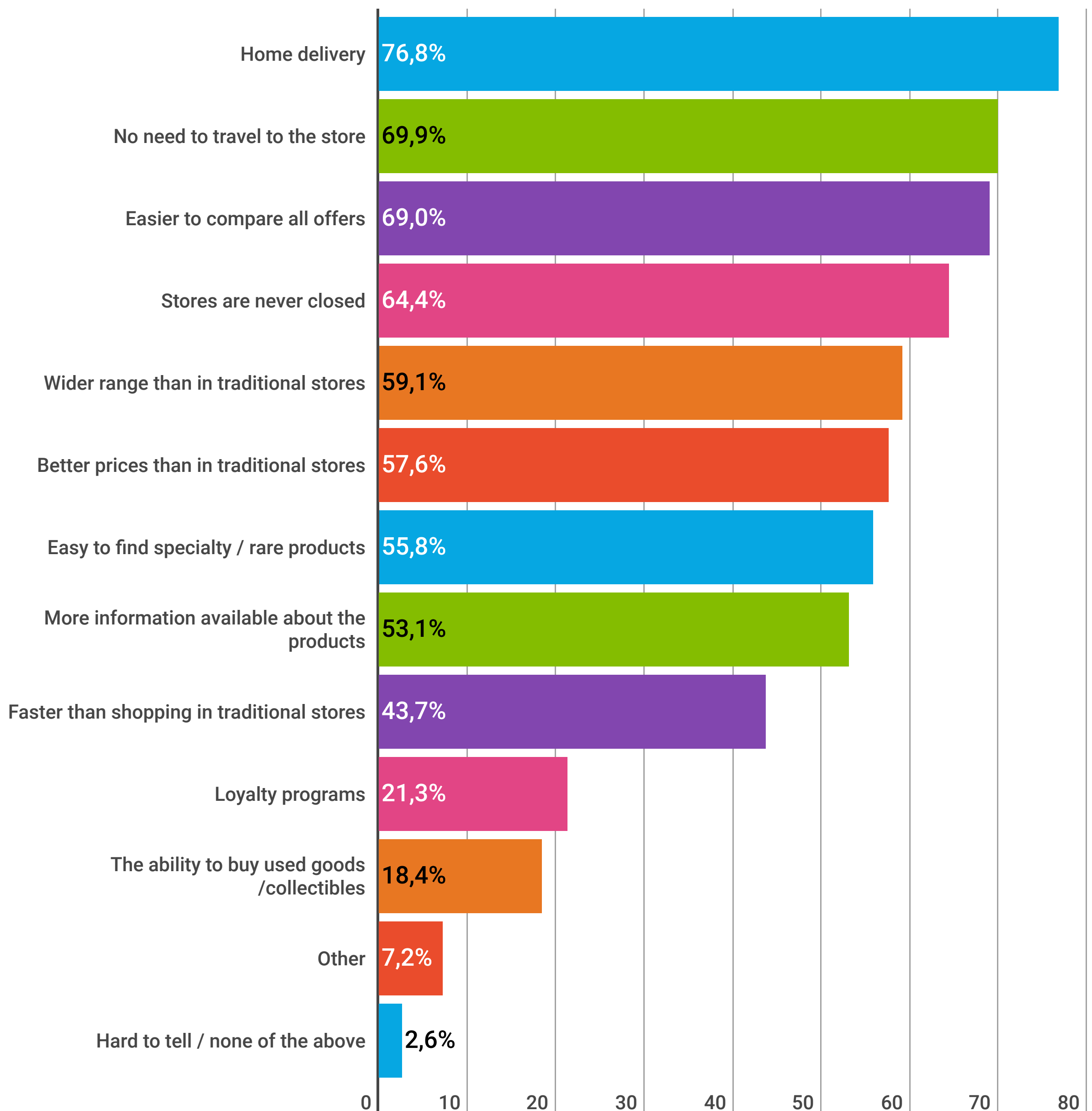
## TOP 25 foreign e-commerce sites



Source: gemiusAdHoc research, February 2020

N= 1128

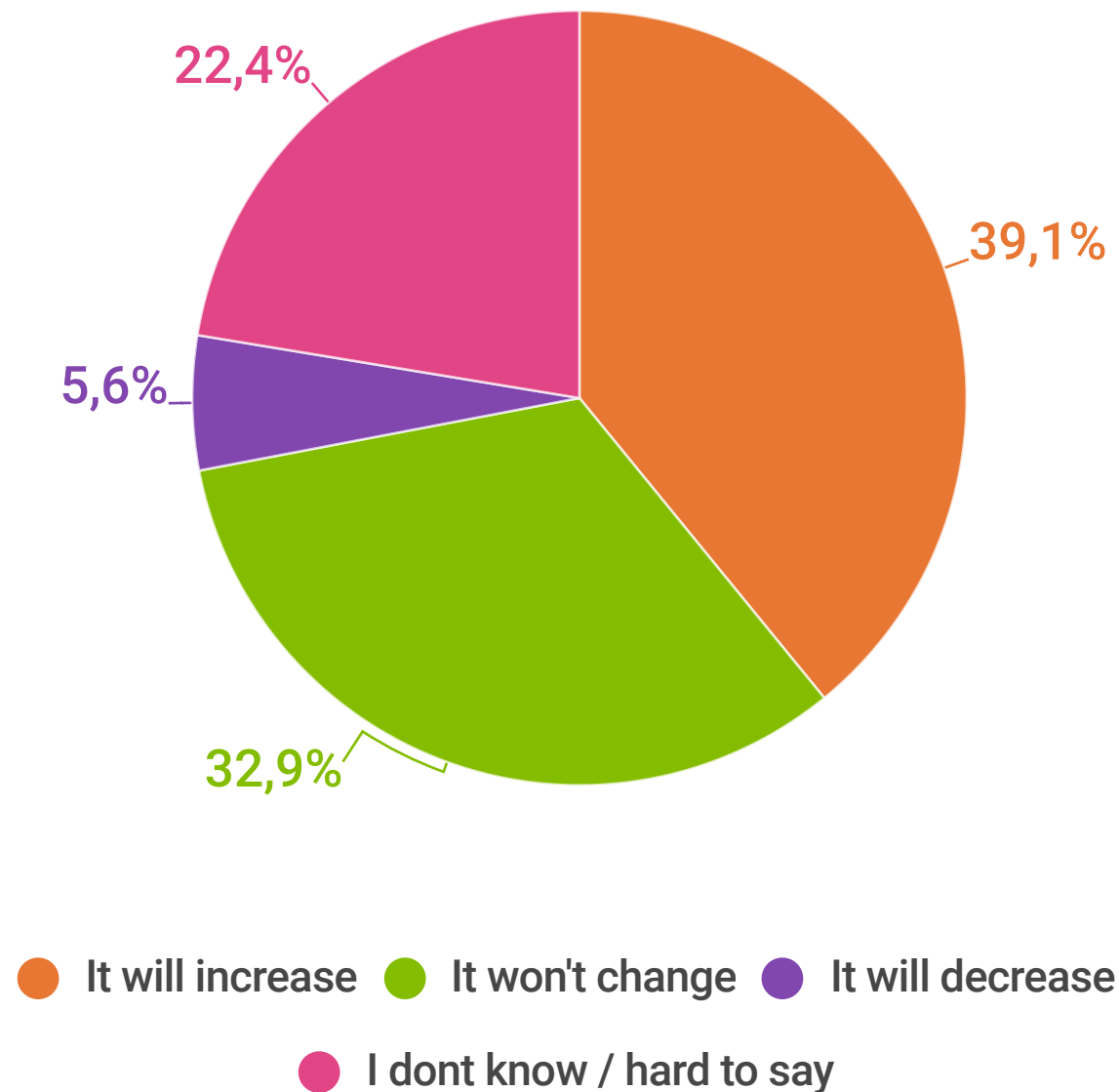
## What motivates you to shop online?



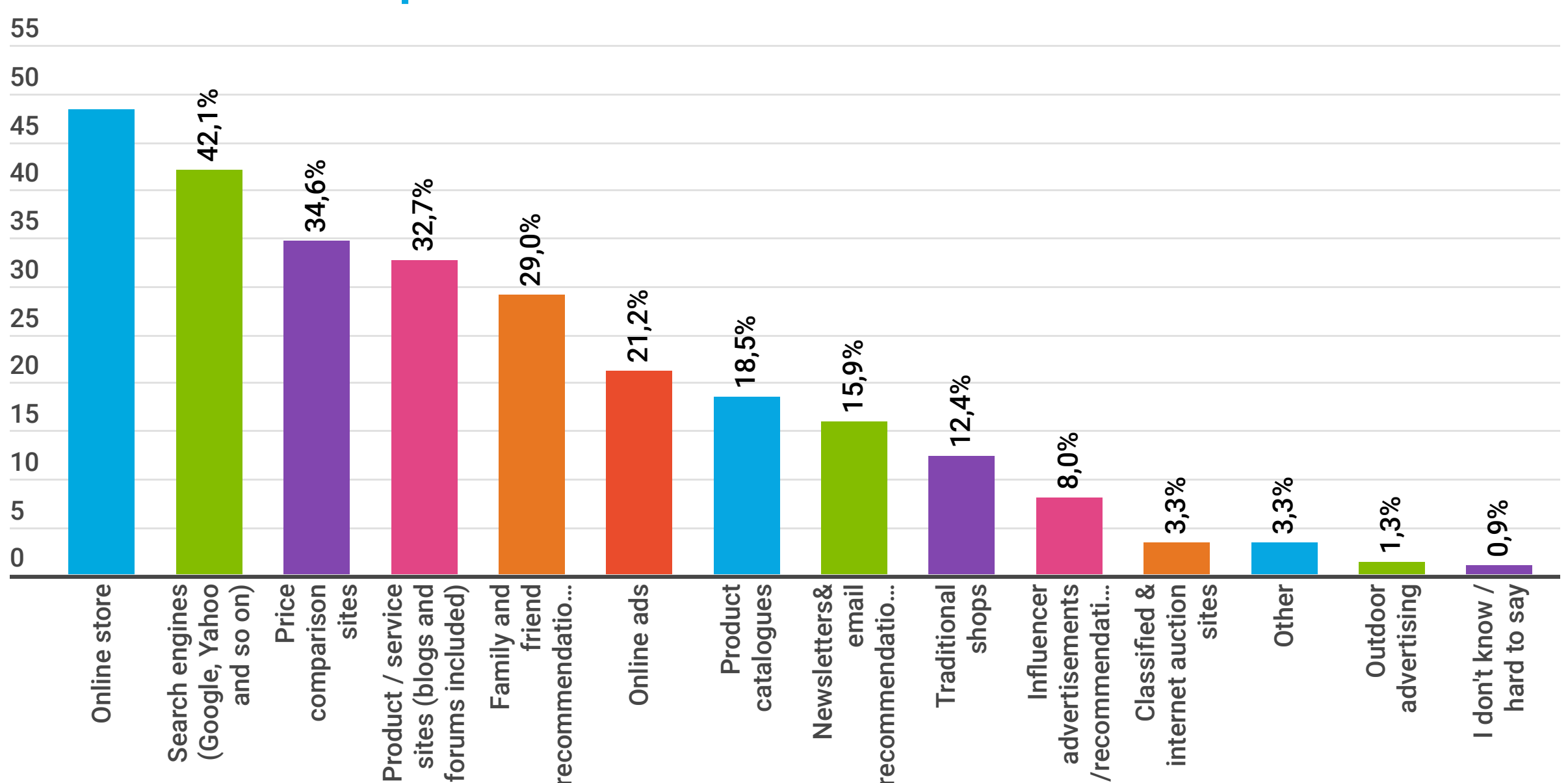
Source: gemiusAdHoc research, February 2020

N= 1290

## How do you think your spending online will change in the next year?



## Please indicate three most important sources of information that affect your decision before making a purchase in e-commerce stores

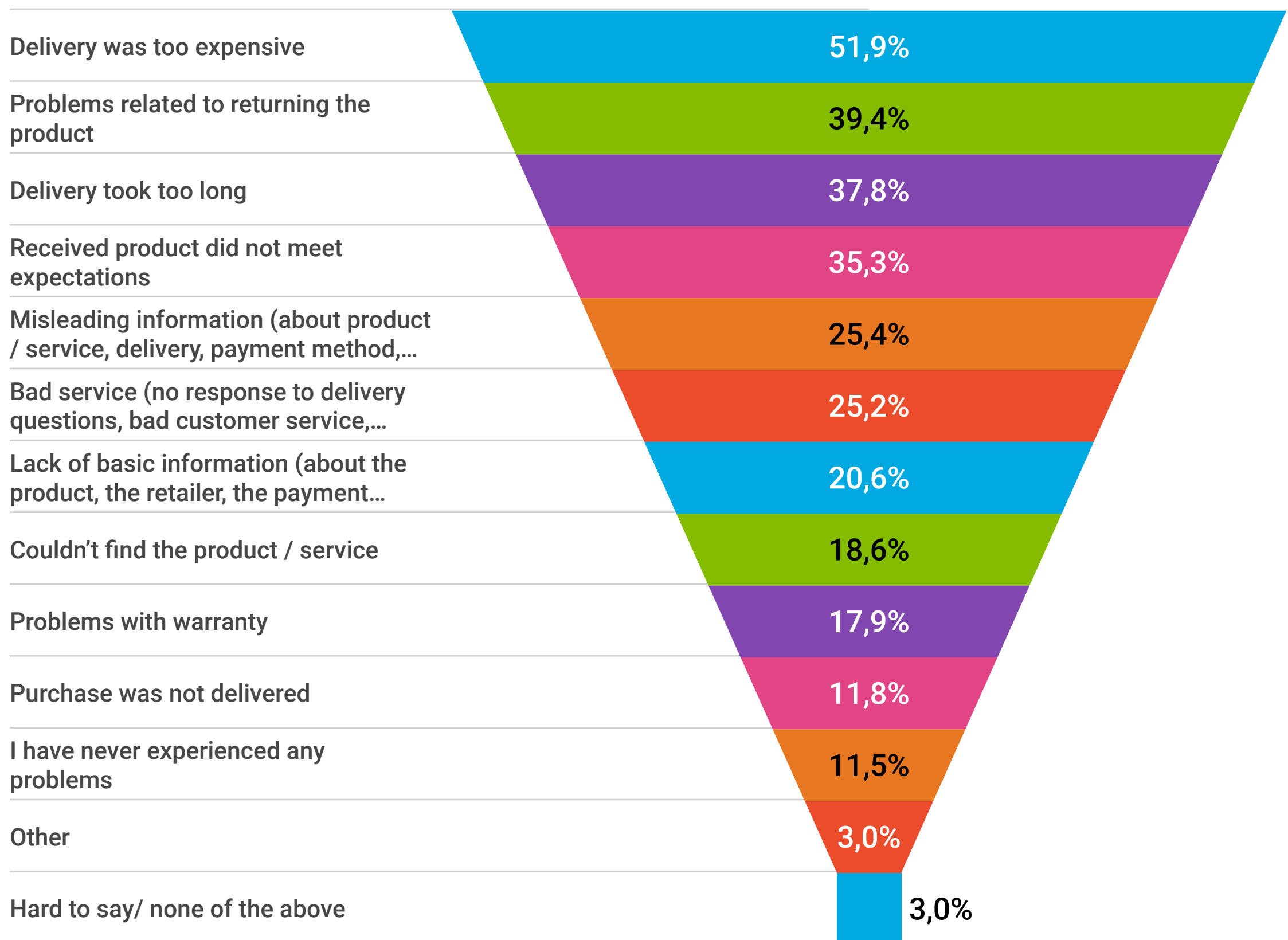


Source: gemiusAdHoc research, February 2020

N= 1290



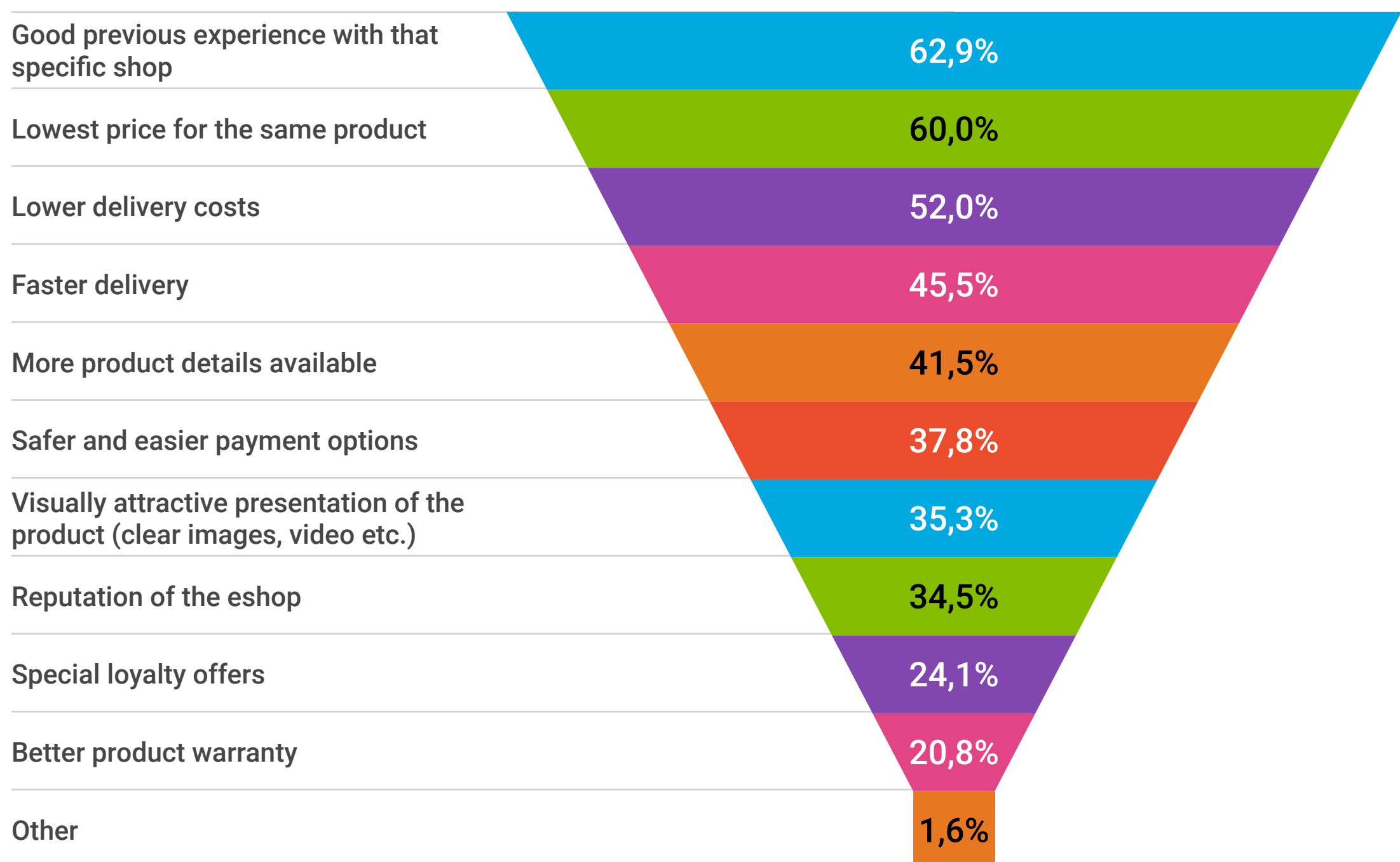
## Difficulties and problems related to shopping online



”

A lot of respondents have encountered problems with courier services - not delivered on a specified time, bad courier attitude, and bad handling of the package that damages the product. Some respondents have also remarked that they have had problems with the return of the goods and sometimes goods are not being delivered to Romania or have high customs fees.

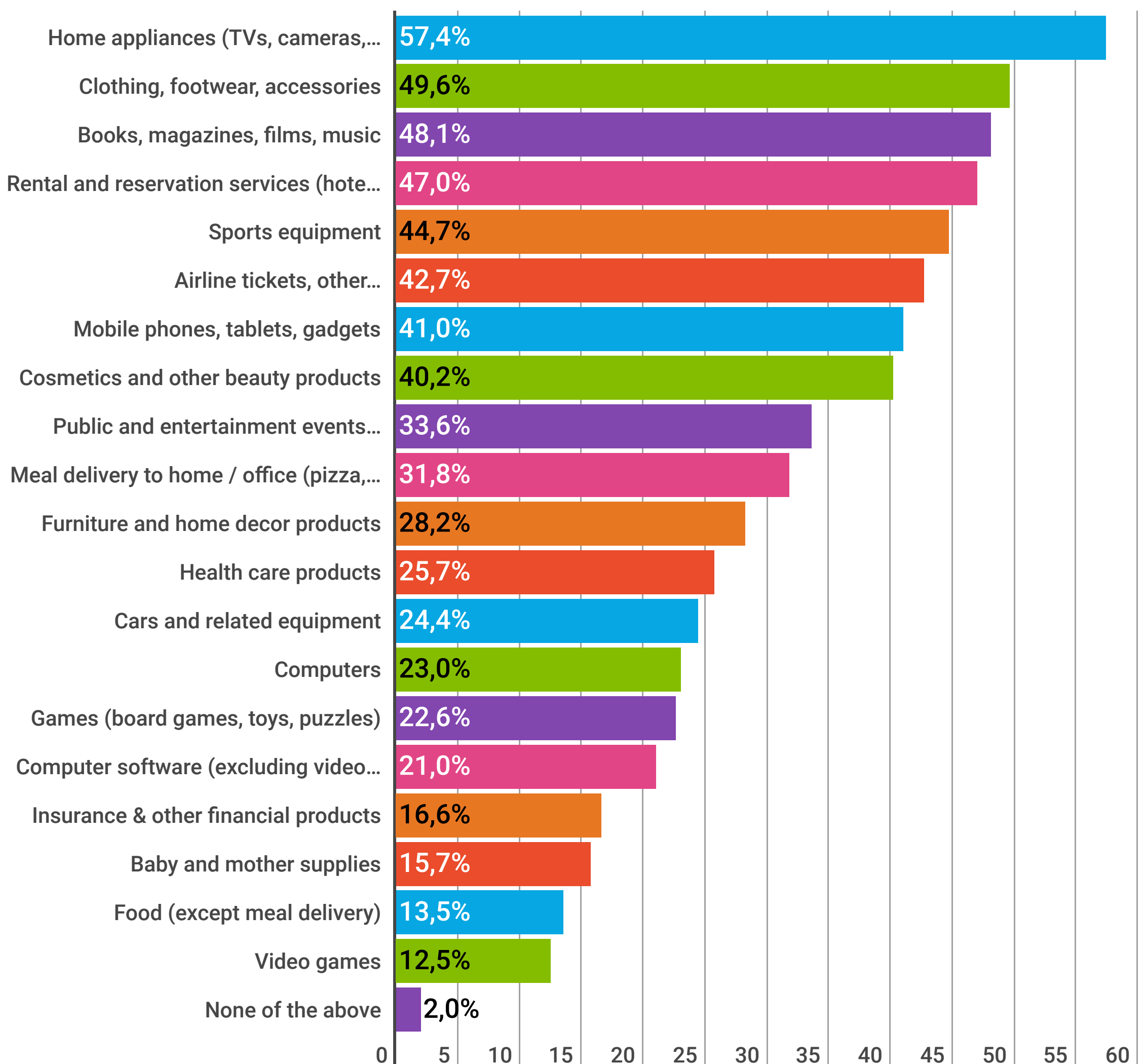
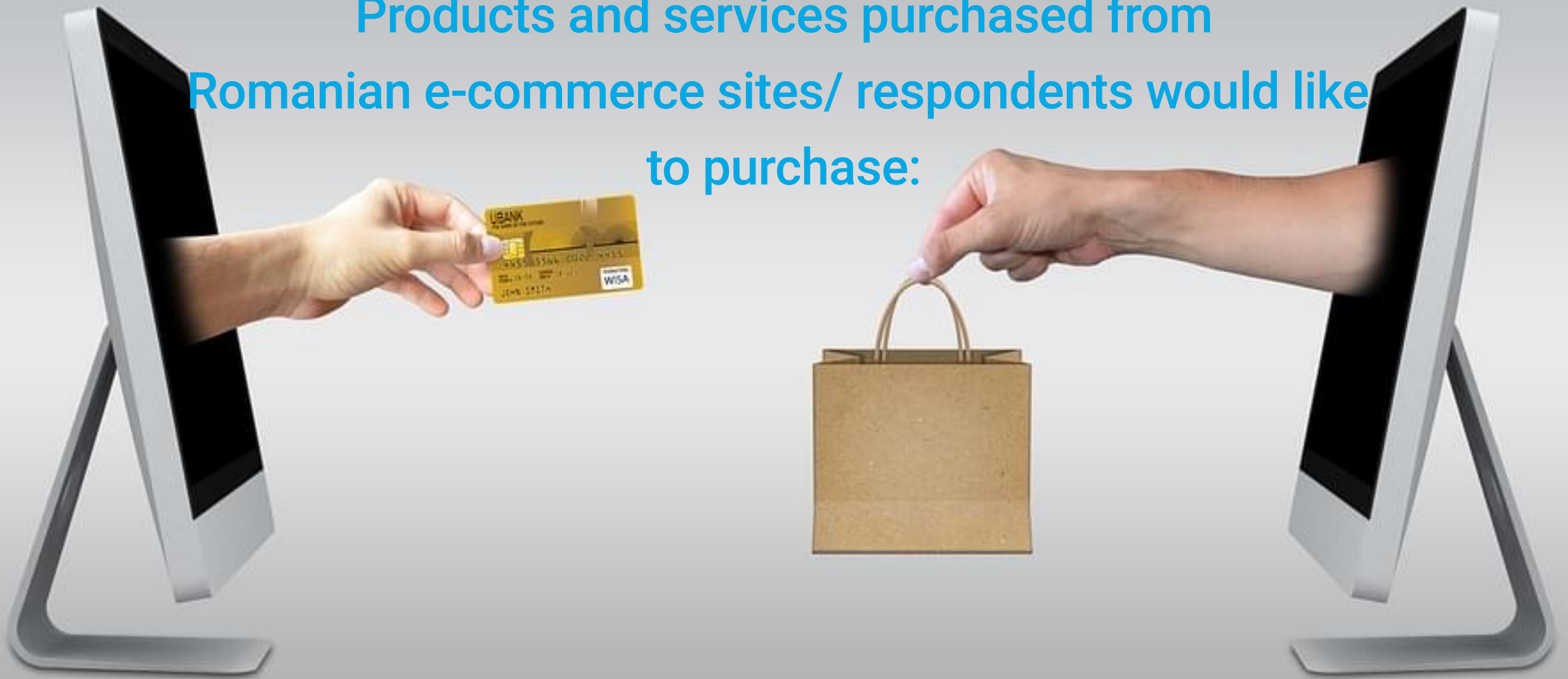
## What motivates you to choose a particular online shop instead of another who sells the same product you want to buy?



”

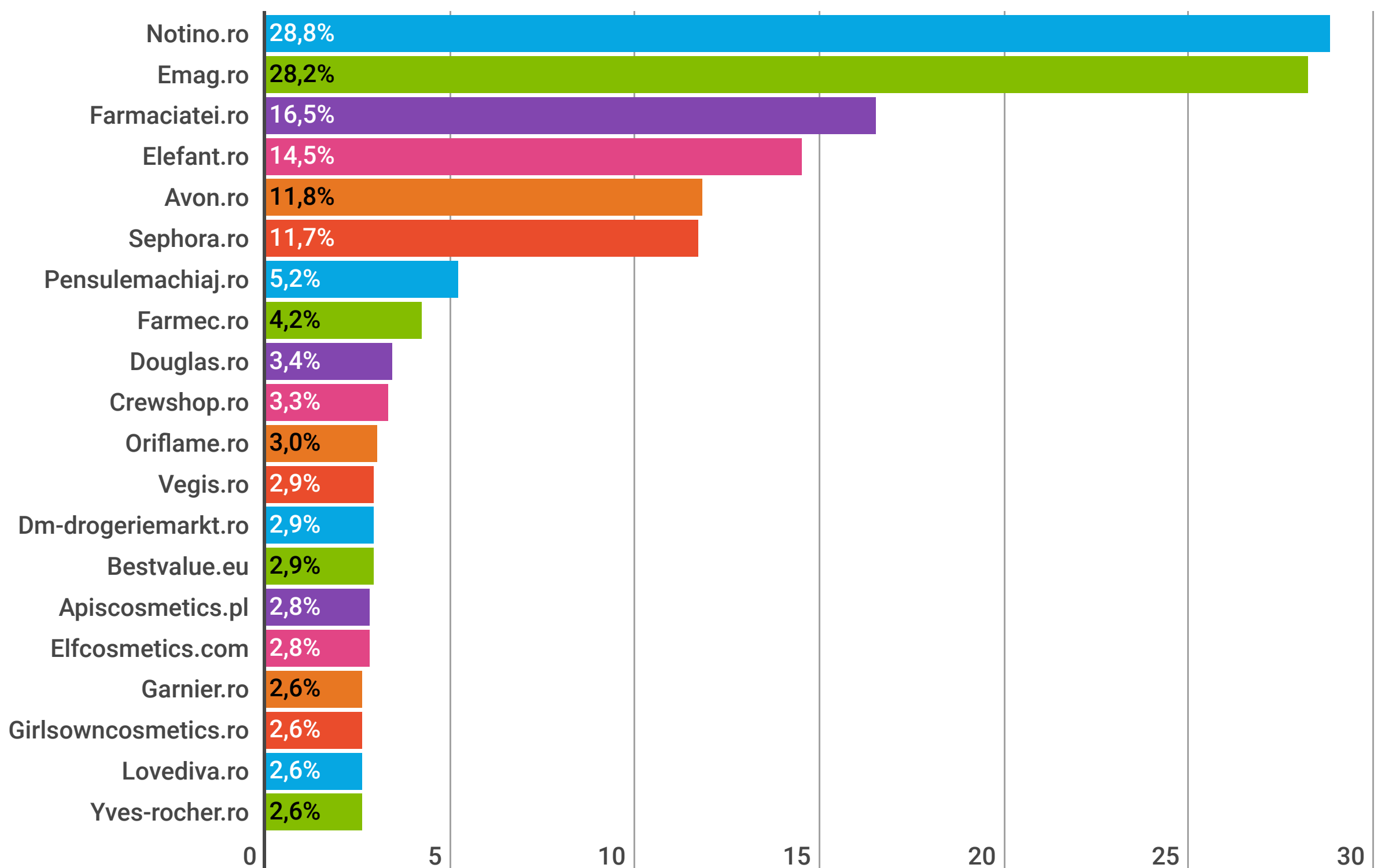
**Respondents have said that they choose online store based on the availability of desired products and best price for it, also previous experience with the store.**

## Products and services purchased from Romanian e-commerce sites/ respondents would like to purchase:





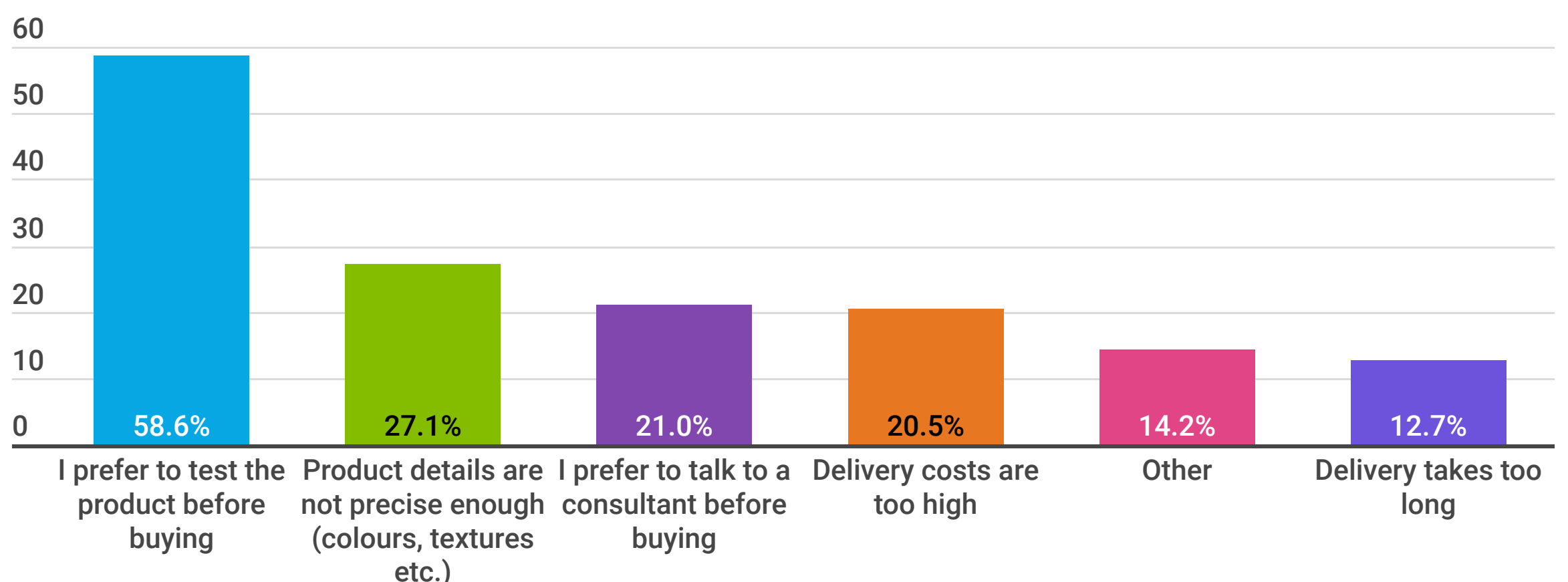
## Please indicate 3 online shops where you usually buy cosmetics and other beauty products



Source: gemiusAdHoc research, February 2020

N= 477

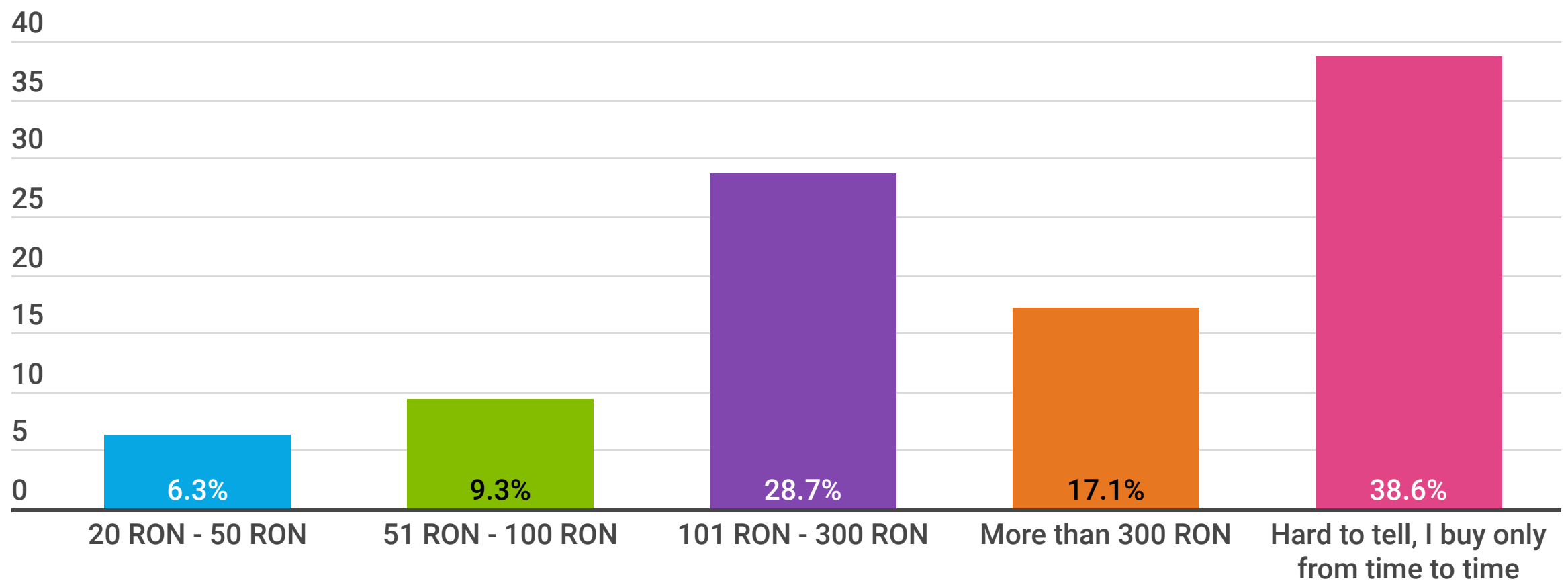
## What are the reasons that stop you from buying cosmetics and other beauty products online?



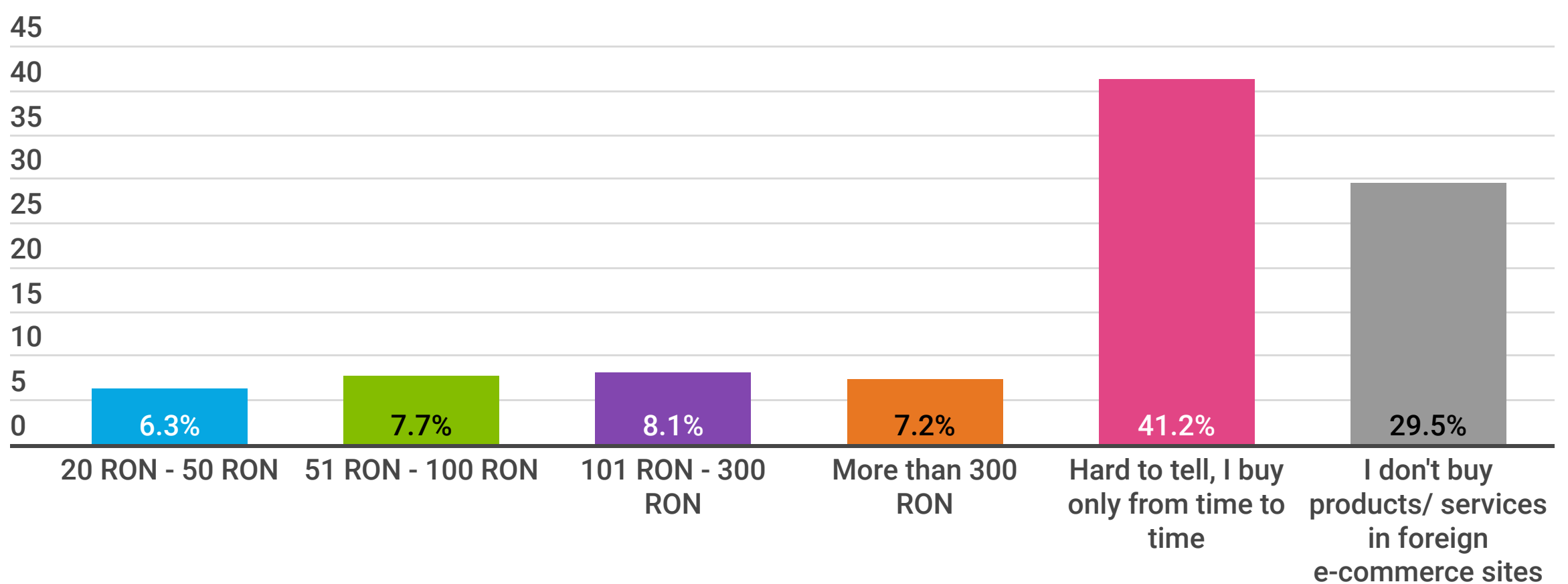
Source: gemiusAdHoc research, February 2020

N= 1172

## How much do you spend on online shopping in Romanian e-commerce sites per month?



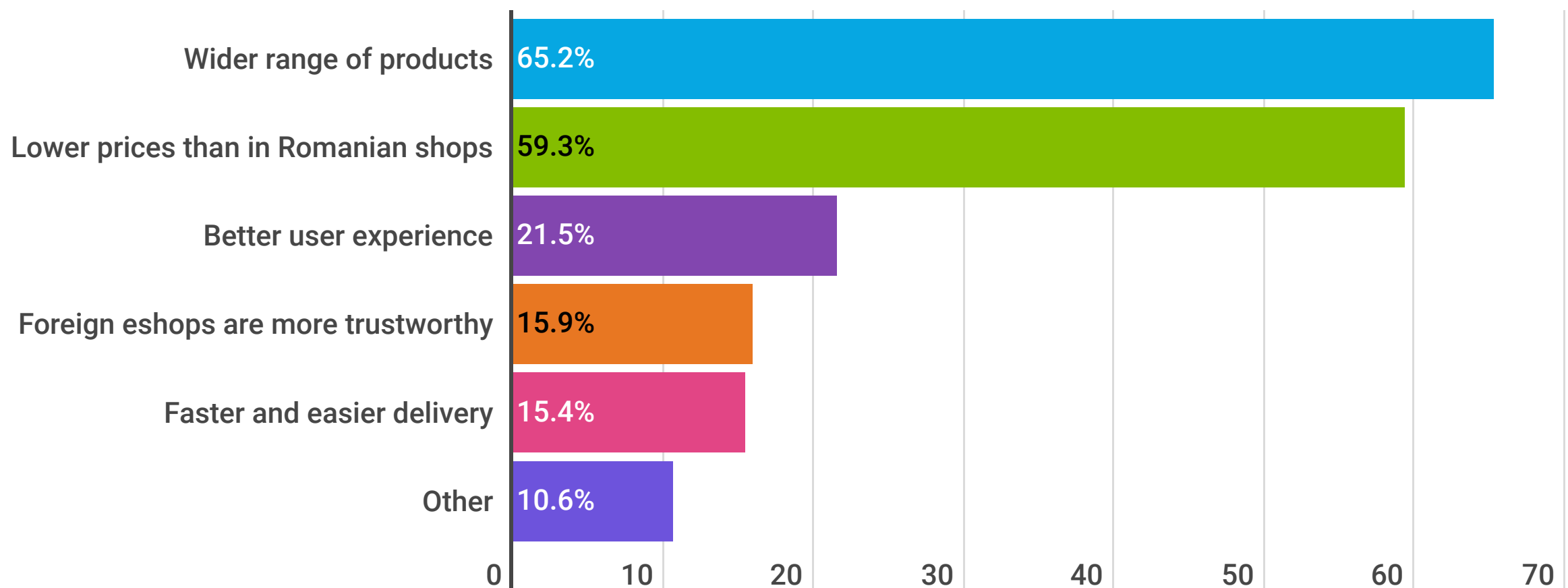
## How much do you spend on online shopping in foreign e-commerce sites per month?



Source: gemiusAdHoc research, February 2020

N= 1290

## What motivates you to shop in foreign online stores?

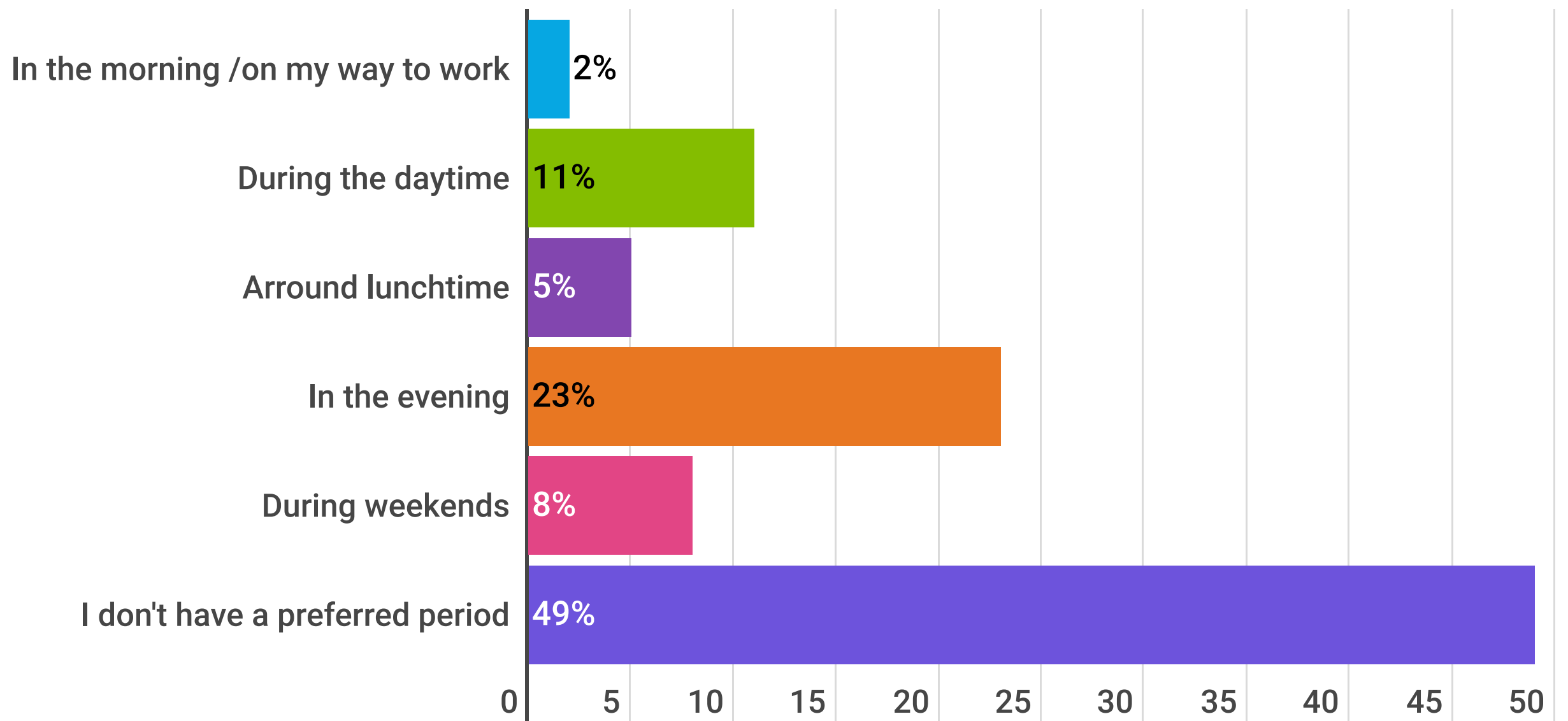


”

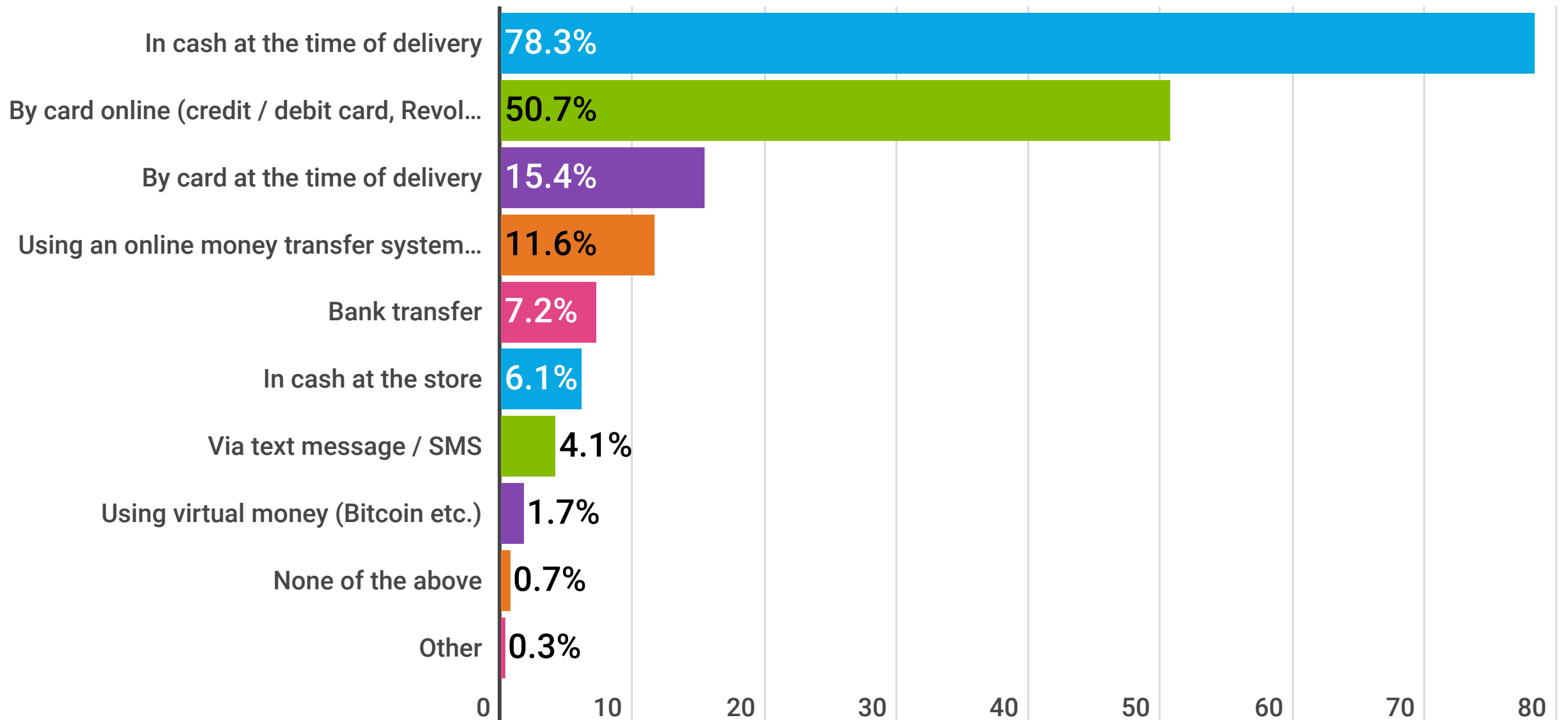
One of the most mentioned reasons is that certain products are available only with a manufacturer who is abroad or are available only in some foreign stores. Some respondents assume that in foreign stores they can get higher quality products.



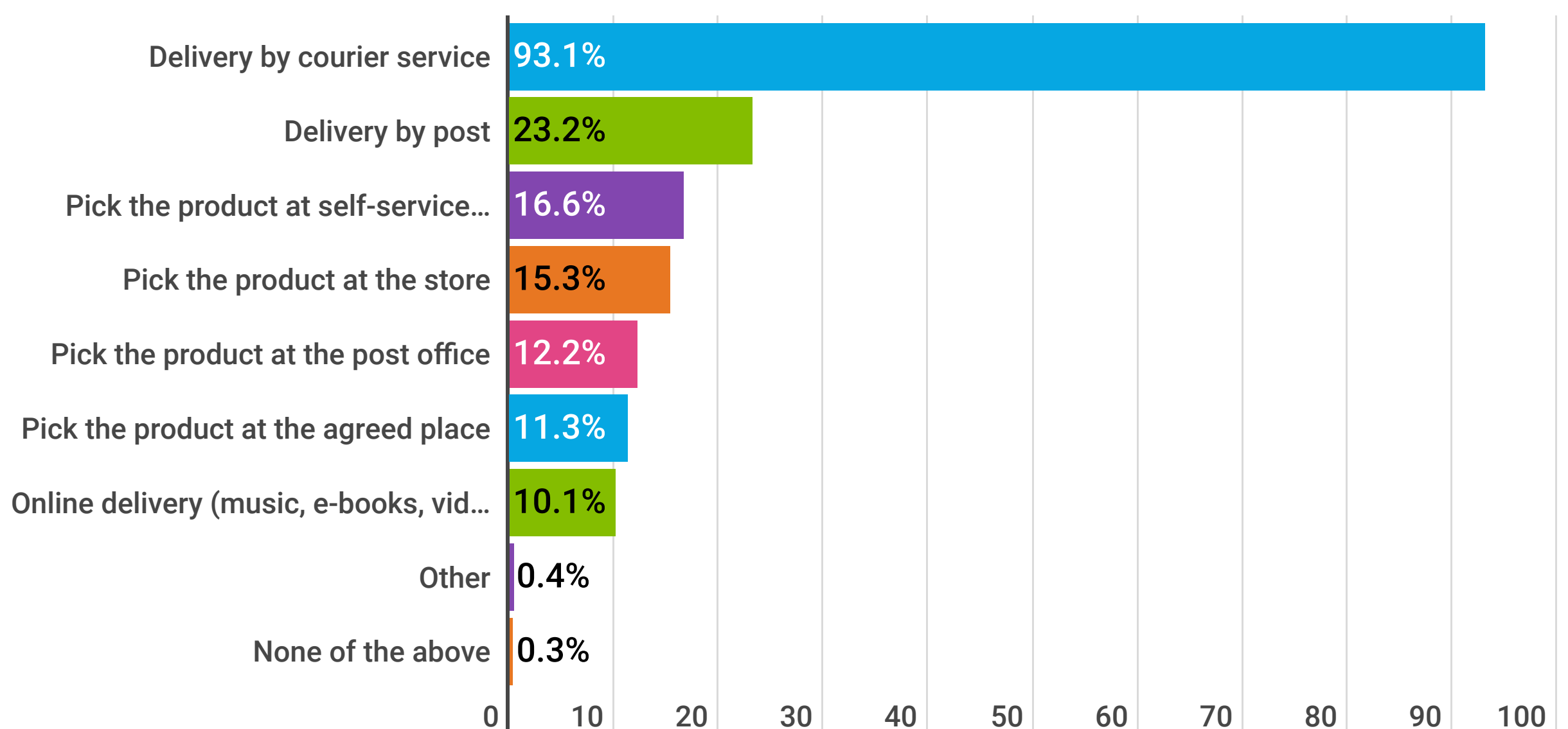
## Do you have a preferred time of the day/ week for online shopping?



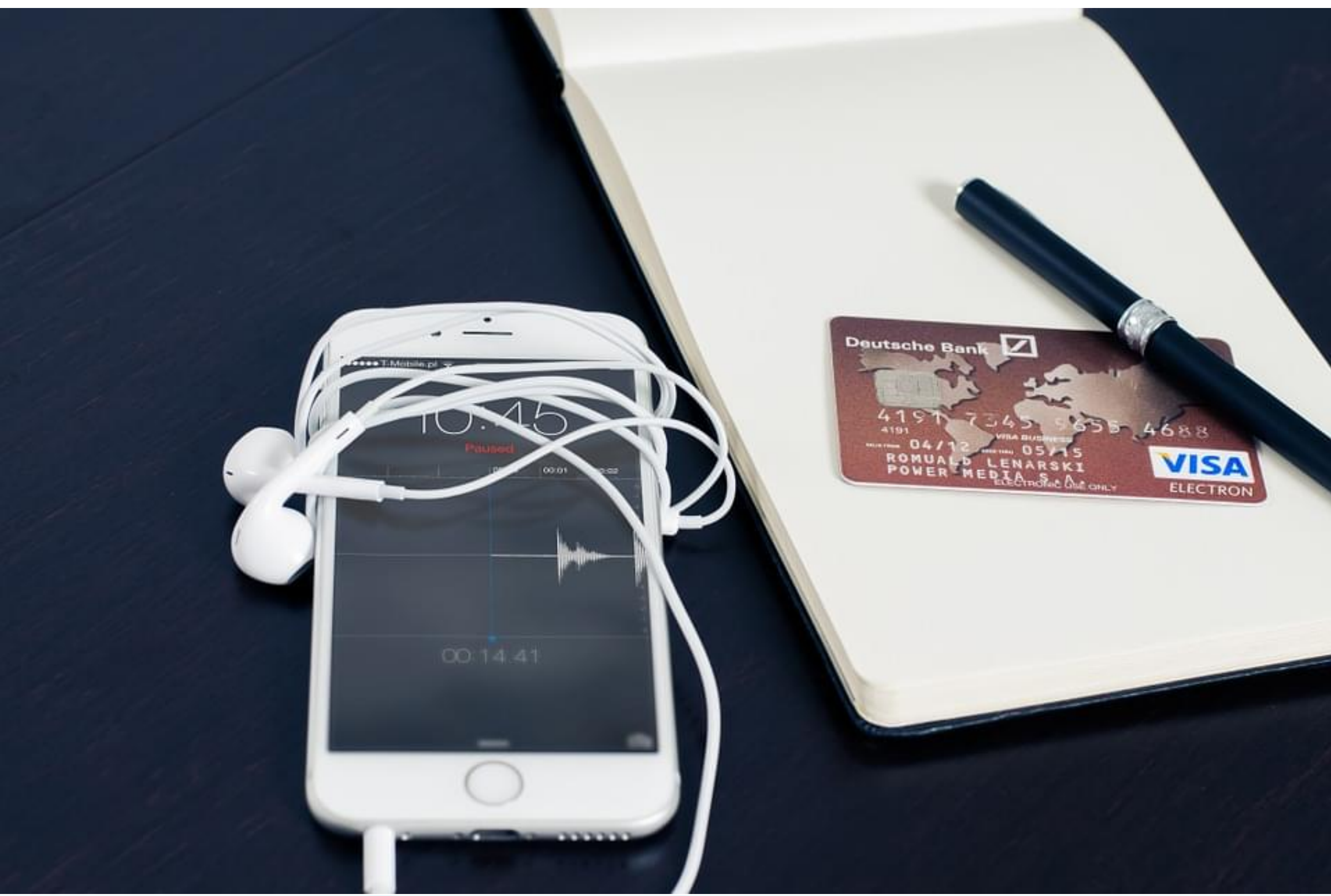
## Which of the mentioned payment options you would prefer to use to make purchases online?



## Which of the mentioned delivery options you would prefer to use to make purchases online?

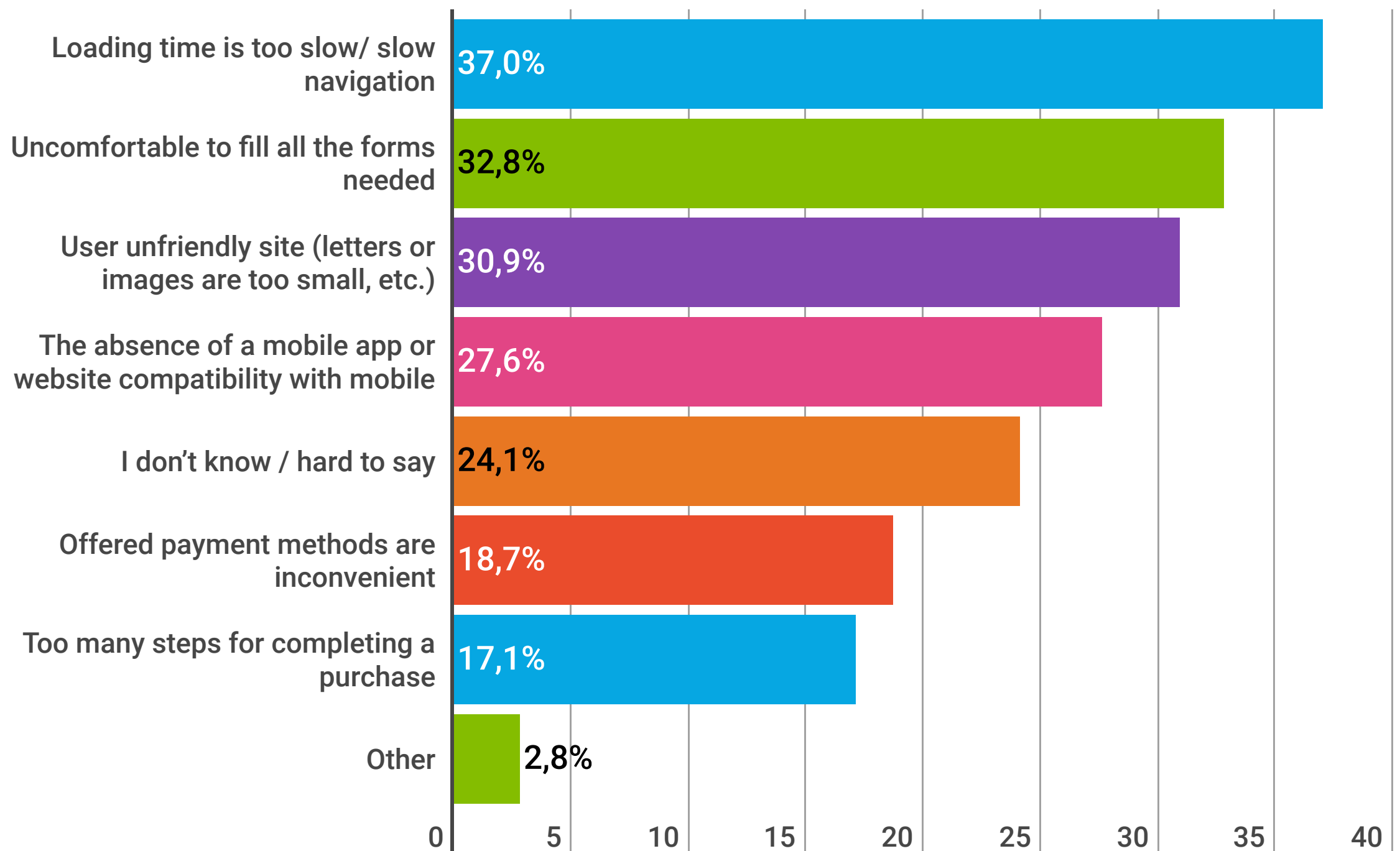


# Analysis of respondents who shop online using mobile devices





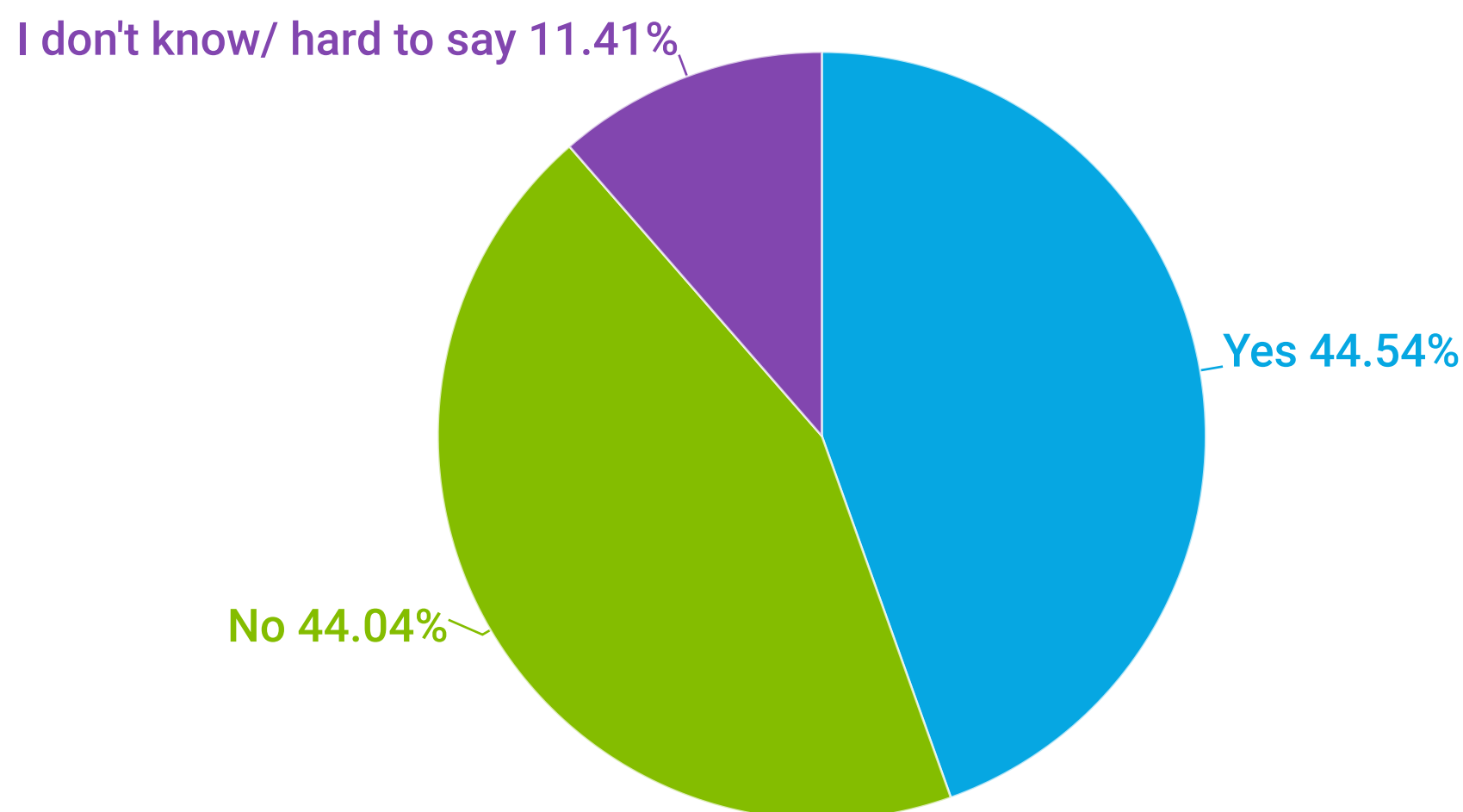
## What difficulties and problems have you encountered while shopping online from mobile devices?



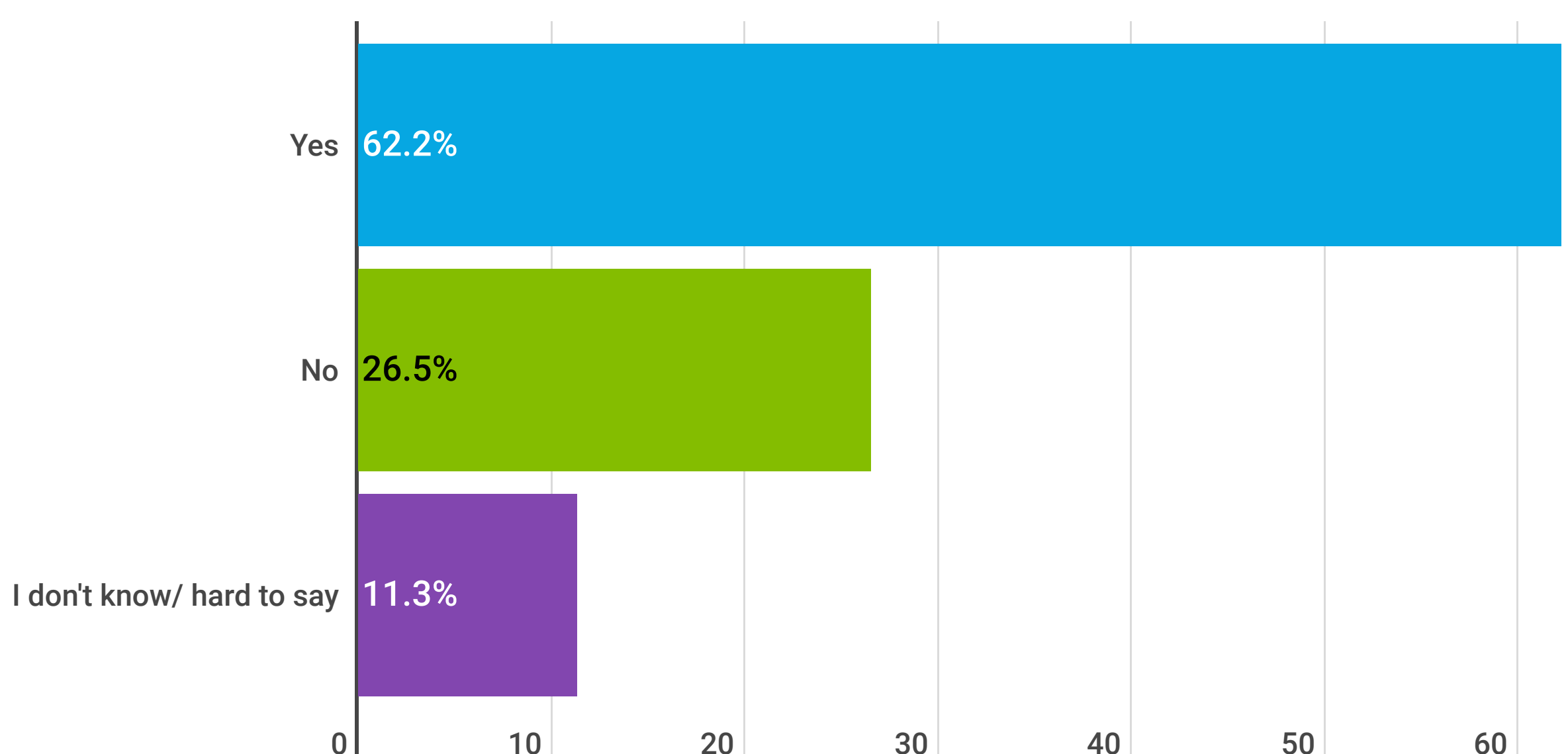
”

**Respondents mentioned that device is small and there are many ads from time to time.**

## Do you often start to buy something online via phone and complete the buying process via computer?



## Do you often compare the prices of the same products on your mobile phone / tablet when you buy from traditional stores?



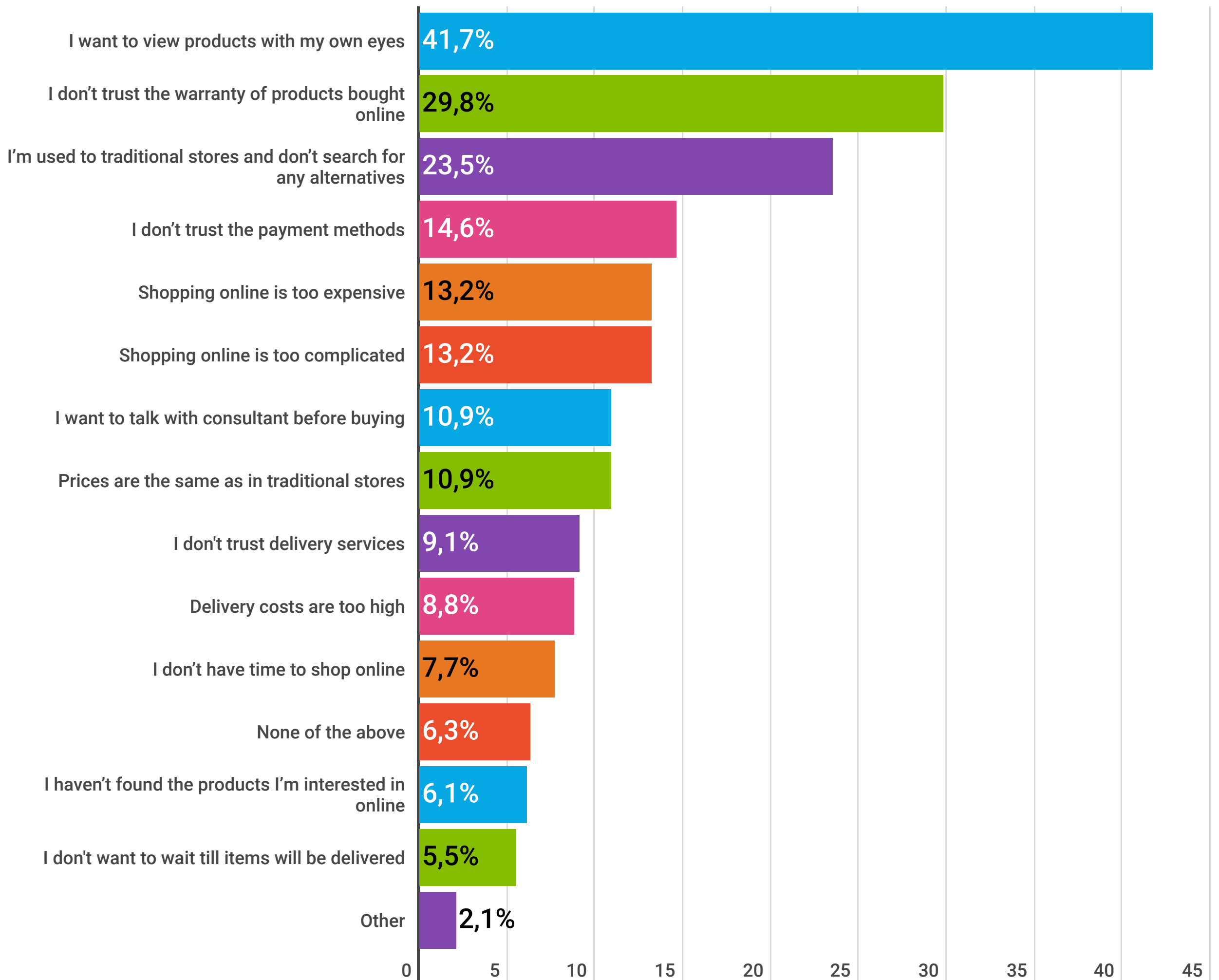


# Analysis of respondents who do not shop online



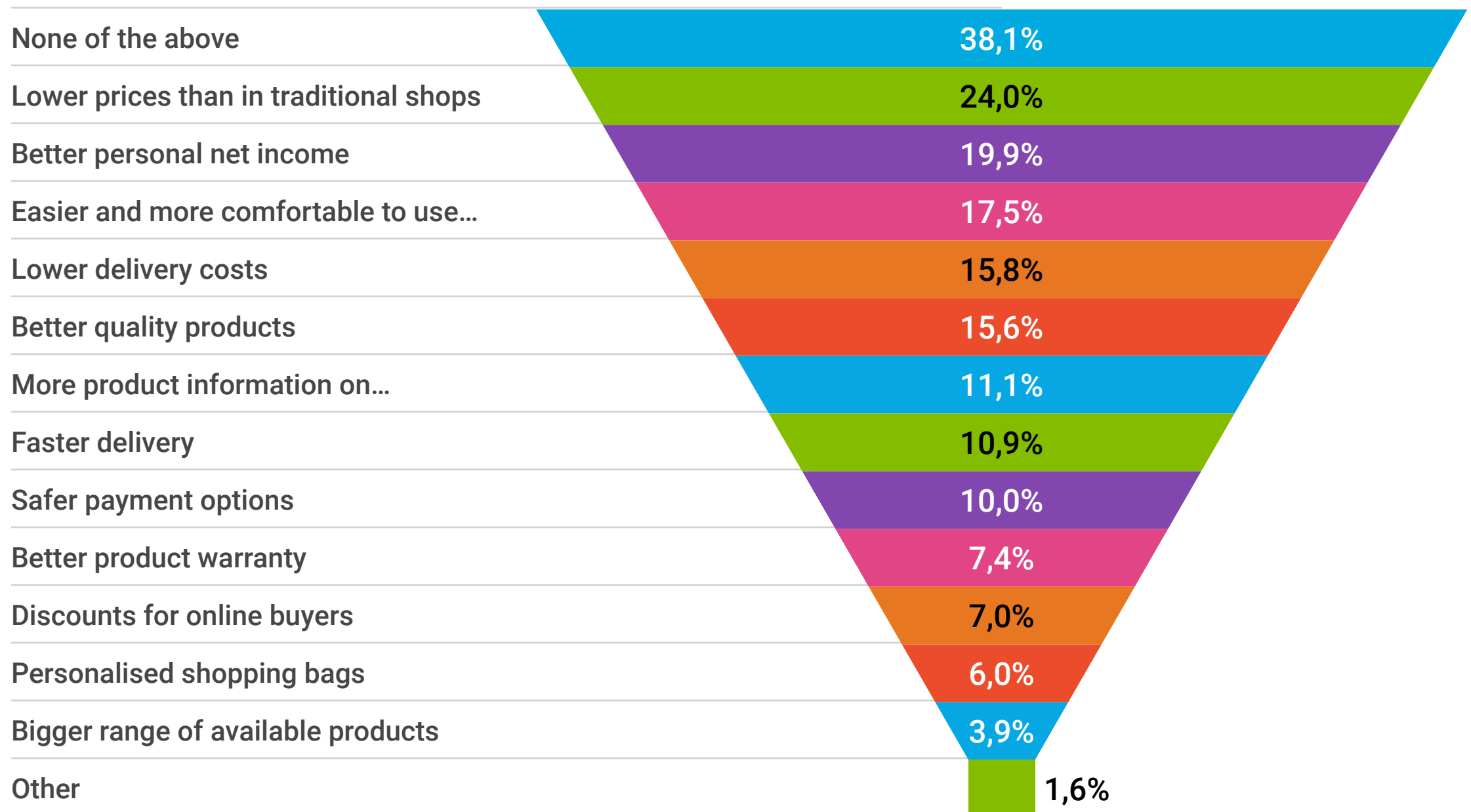


# What are the reasons you have not made any purchases online?

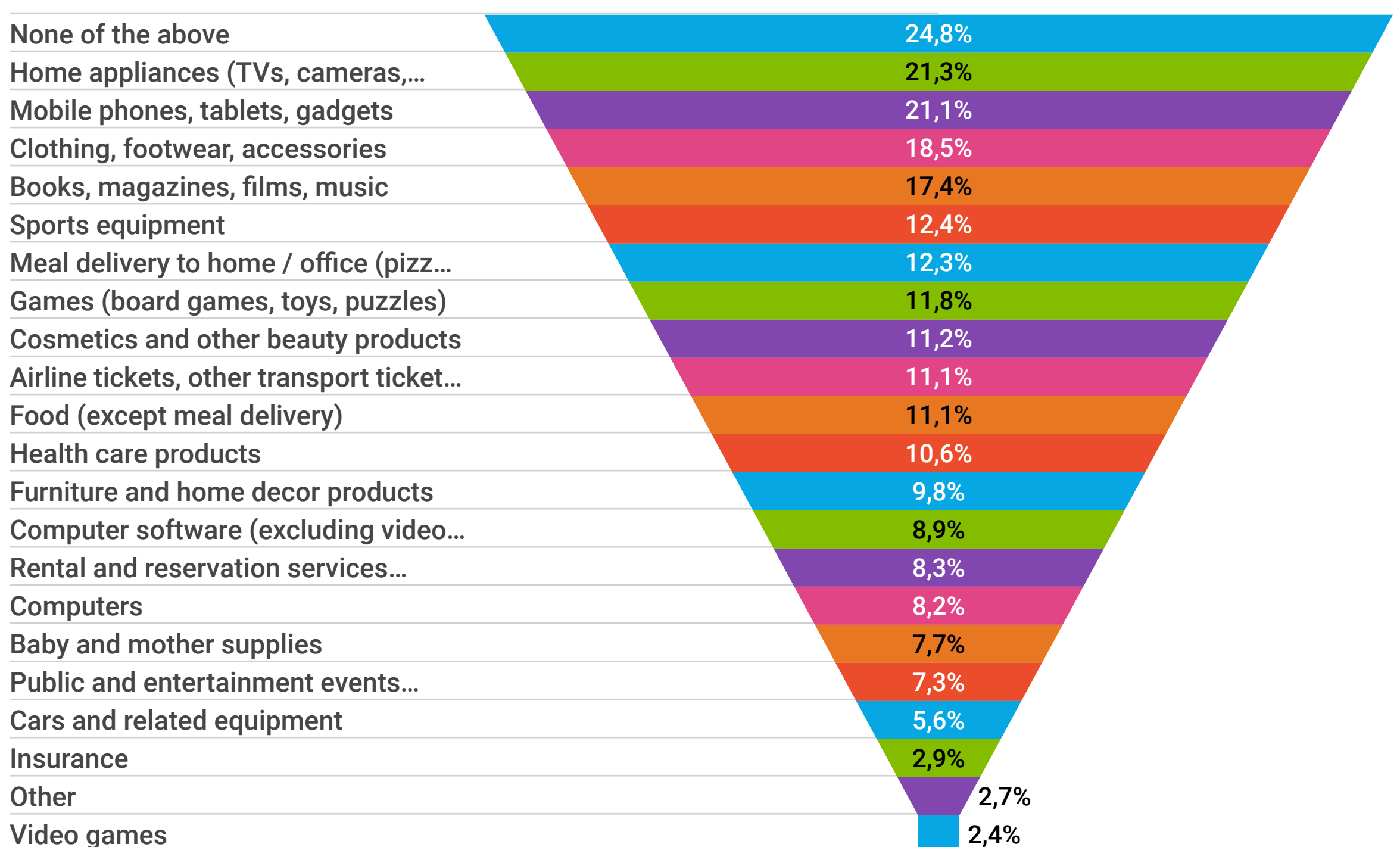


Source: gemiusAdHoc research, February 2020  
N= 401

## What would motivate you to start shopping online?



## Which products would interest you?



# **E-Commerce in Romania and the effects of Covid-19**







## Methodology:

The study was conducted by an online survey in POP-UP format, which was shown to randomly selected Internet users.

Survey questionnaire consists of 41 question (35 key survey questions and 6 socio-demographic questions).

Data weighted with structural data by gender, age and education.

Sample (N) – actual number of respondents of the questionnaire.

## Target group:

Internet users in Romania aged from 14 to 74 years

## Period:

22 June - 7 September, 2020

## Sample:

N=1056



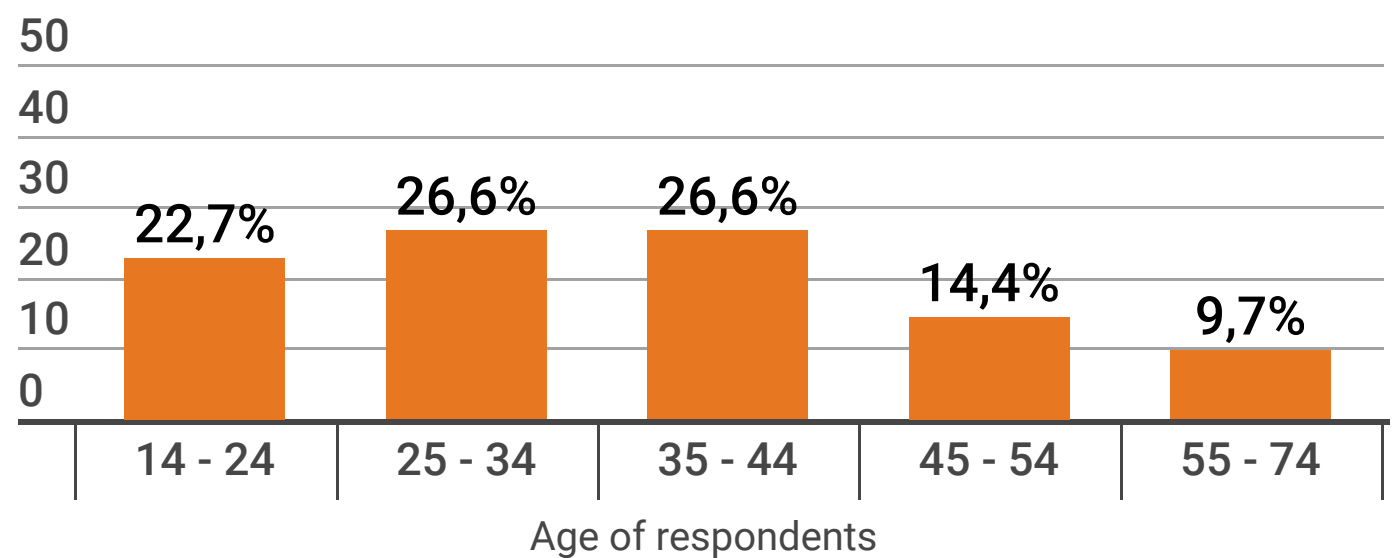
# Socio-demographic profile



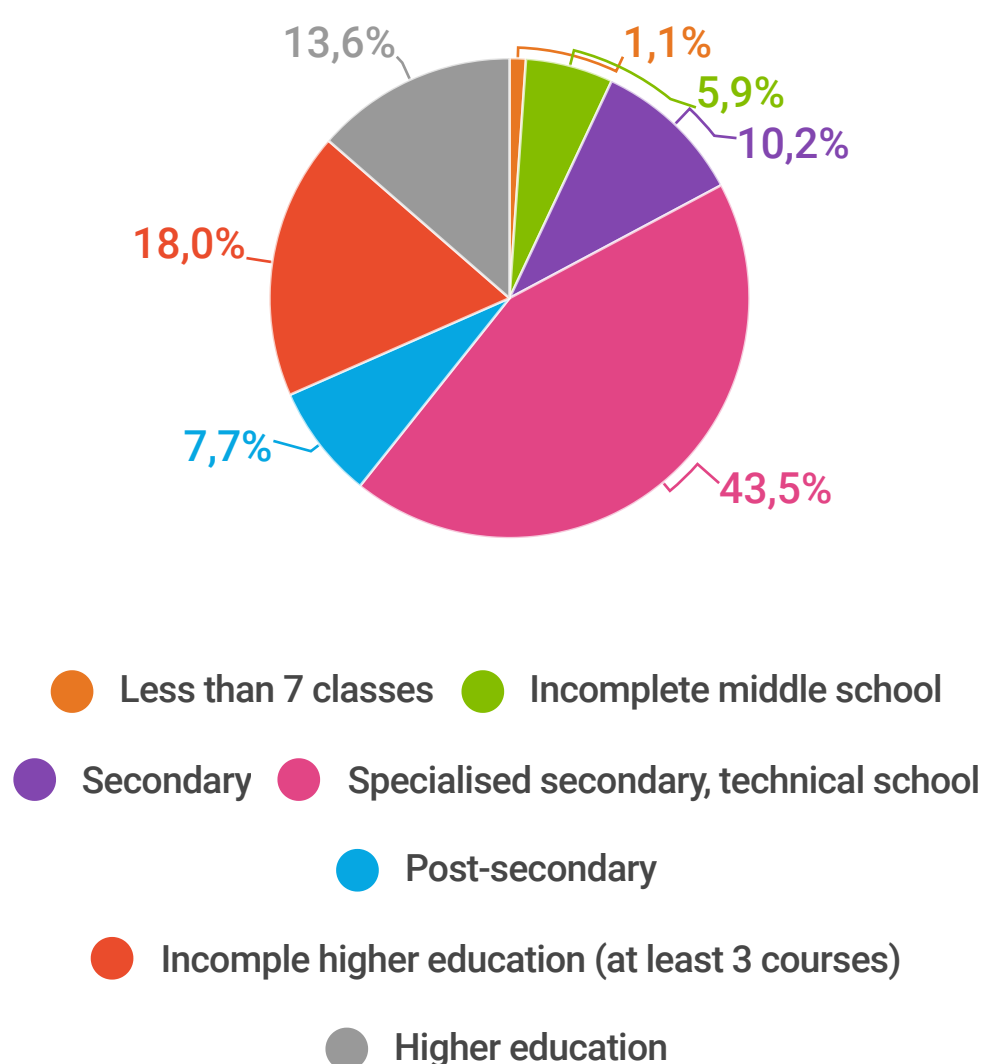
56,3 %



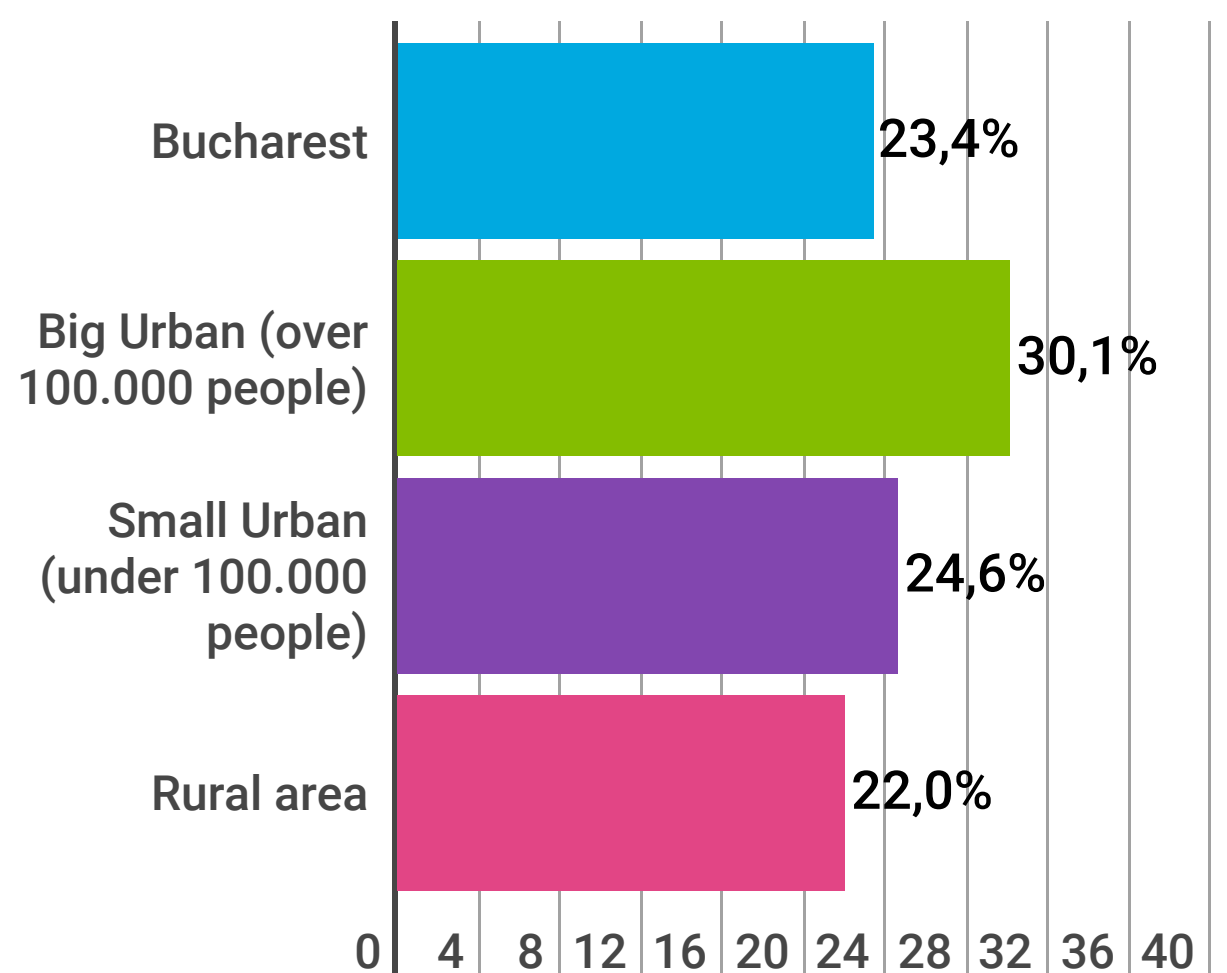
43,7 %



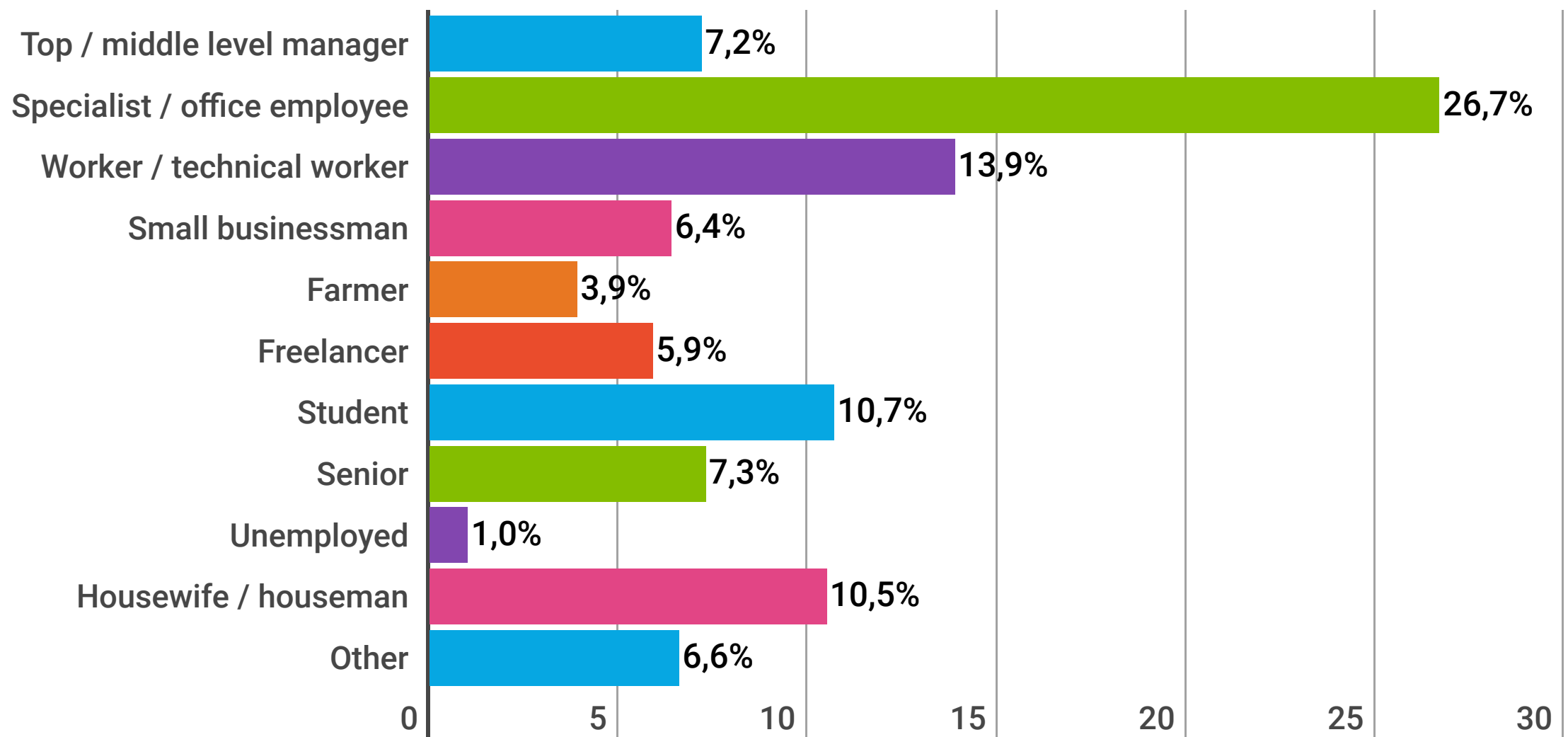
## Education



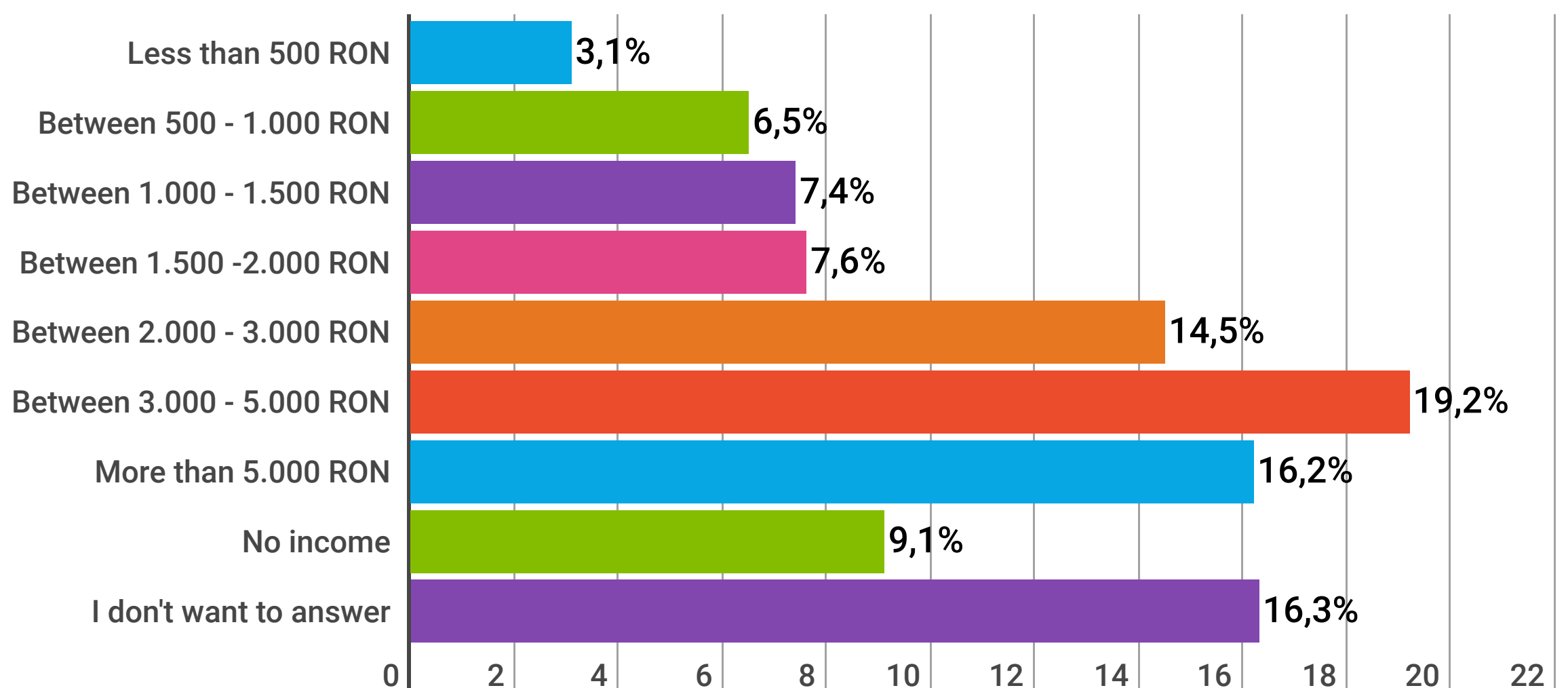
## Place of living



## Current employment status

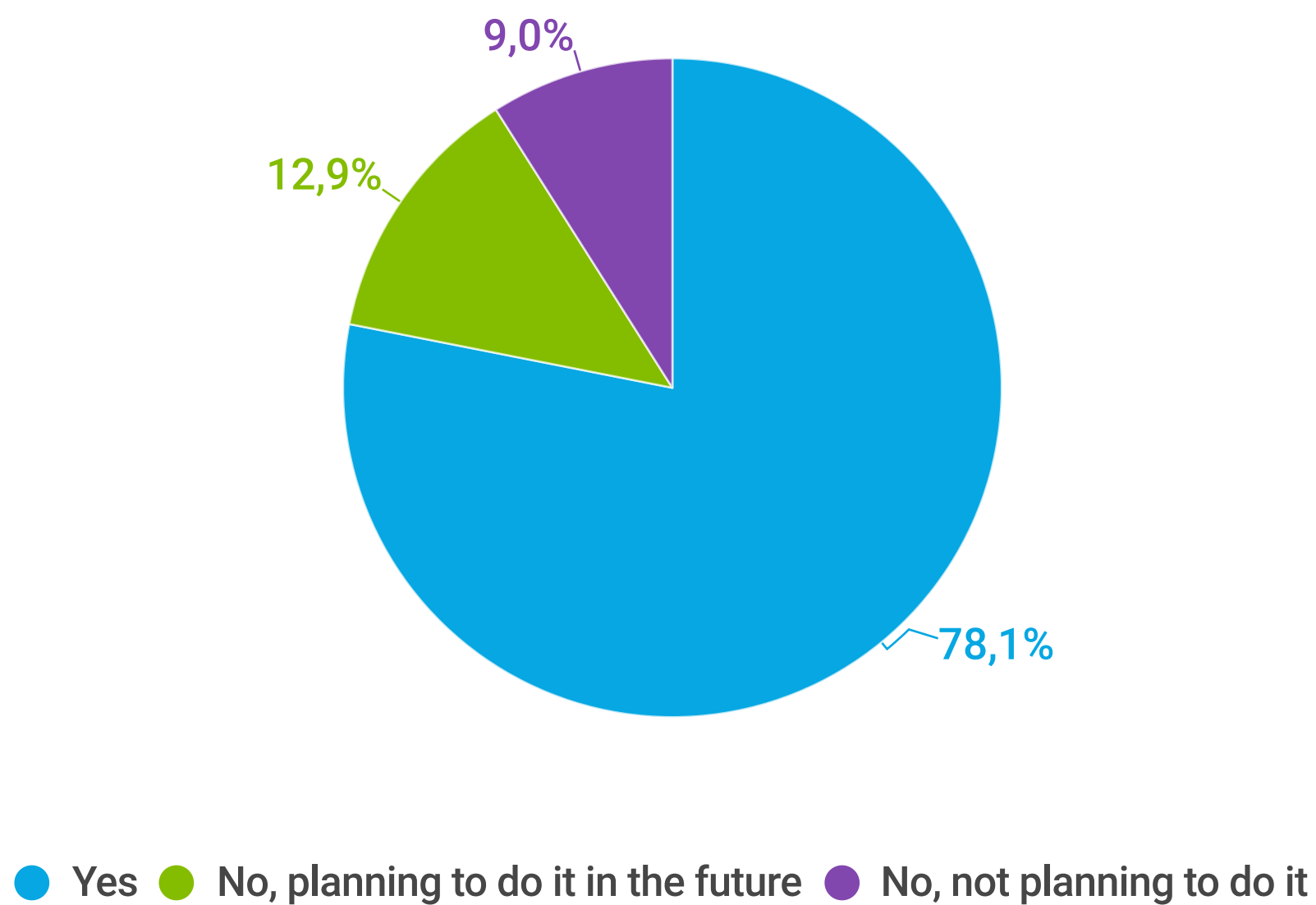


## Average net income

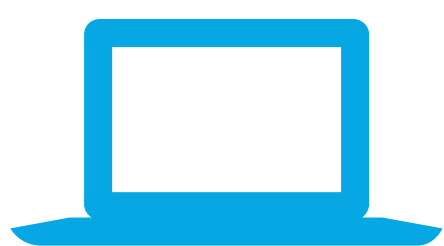




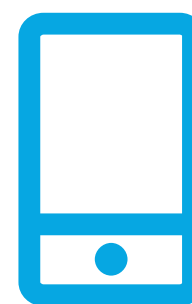
## Have you made any purchase online?



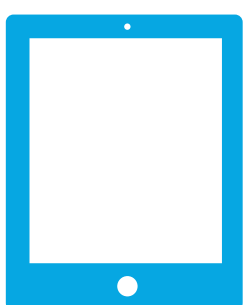
## The inhabitants of Romania who shop on the internet, from them...



85,9% from PC



67,1% from mobile phone



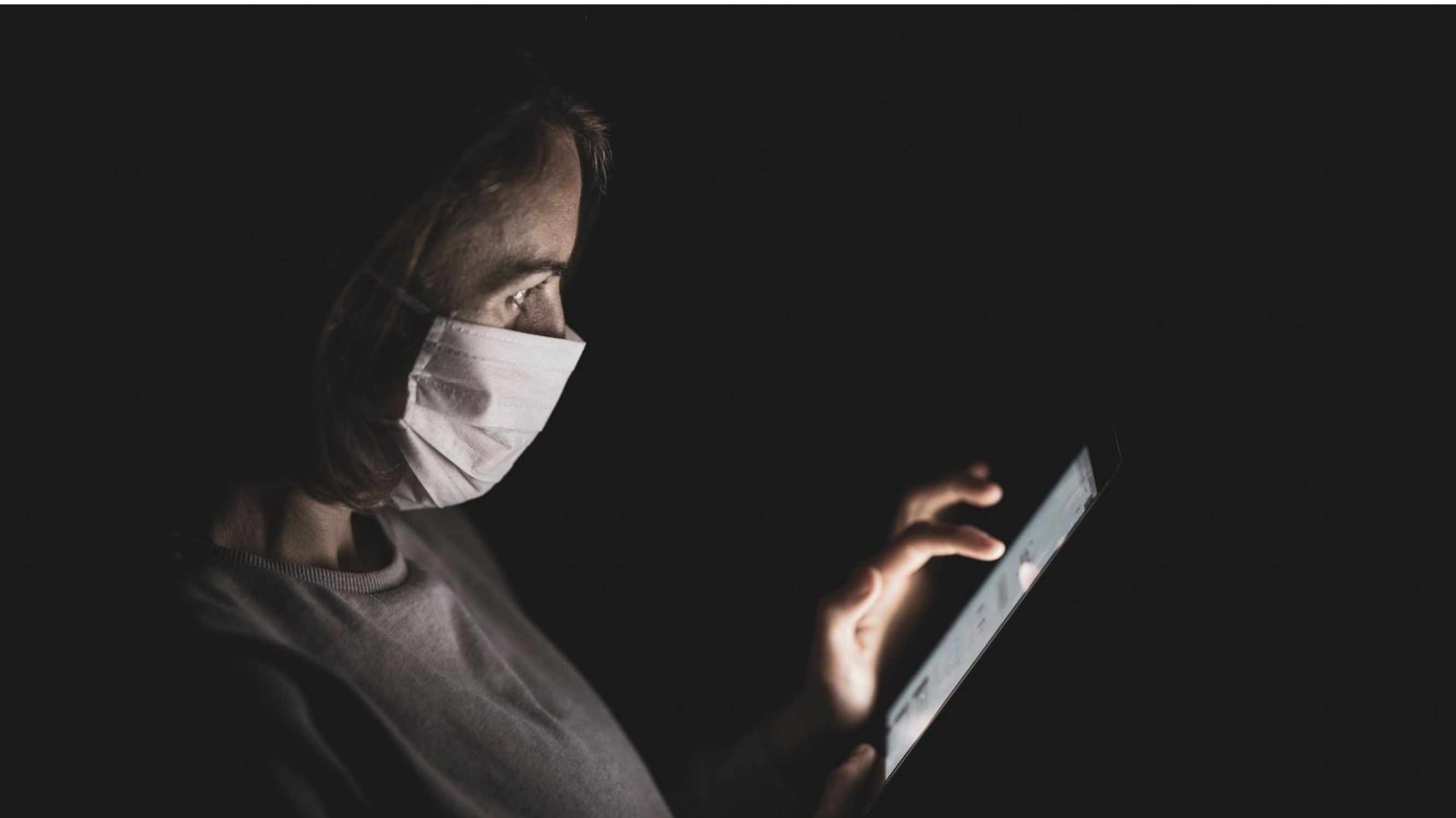
15,7% from tablet



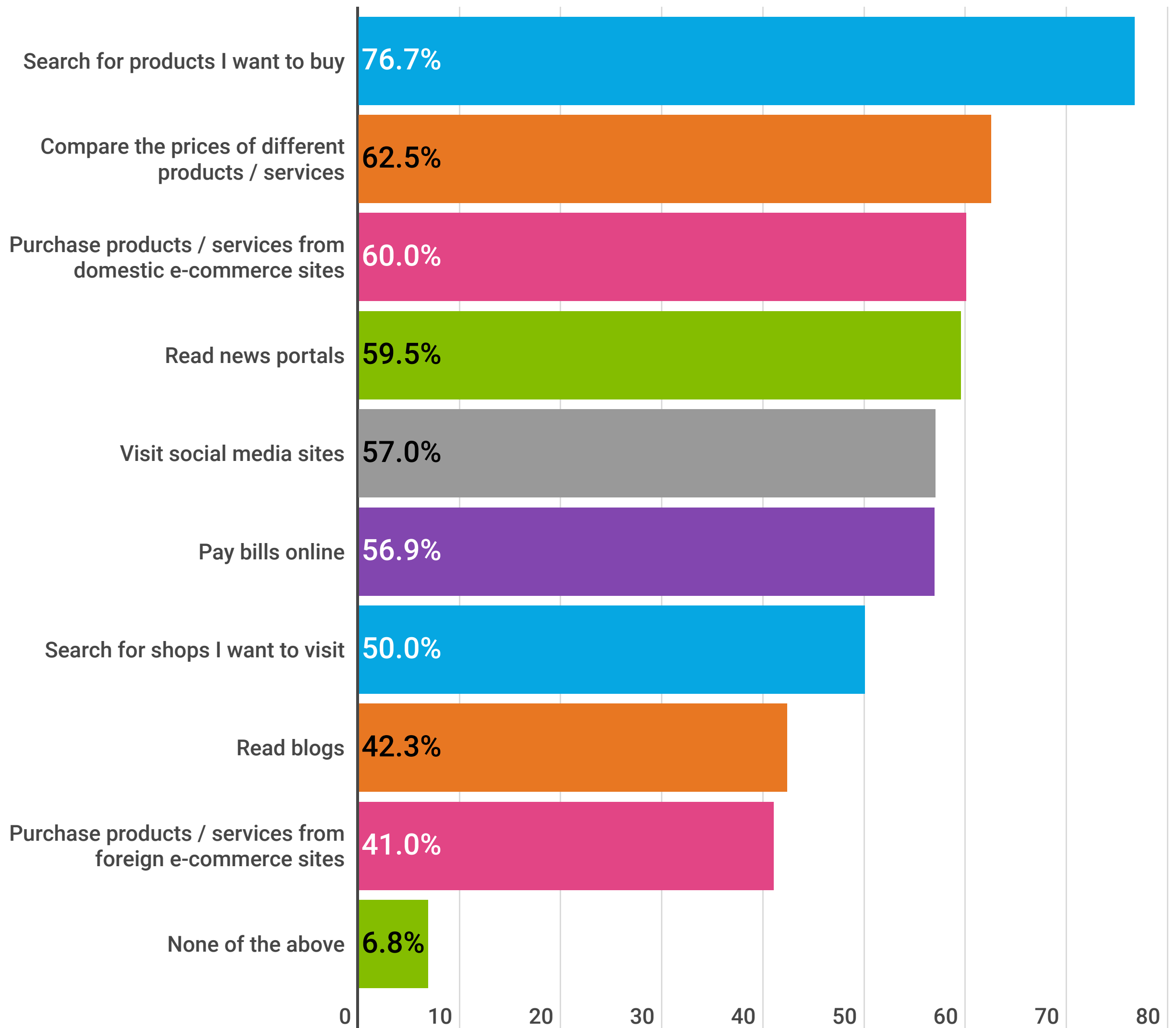
9,5% from TV



# Overview of online activities



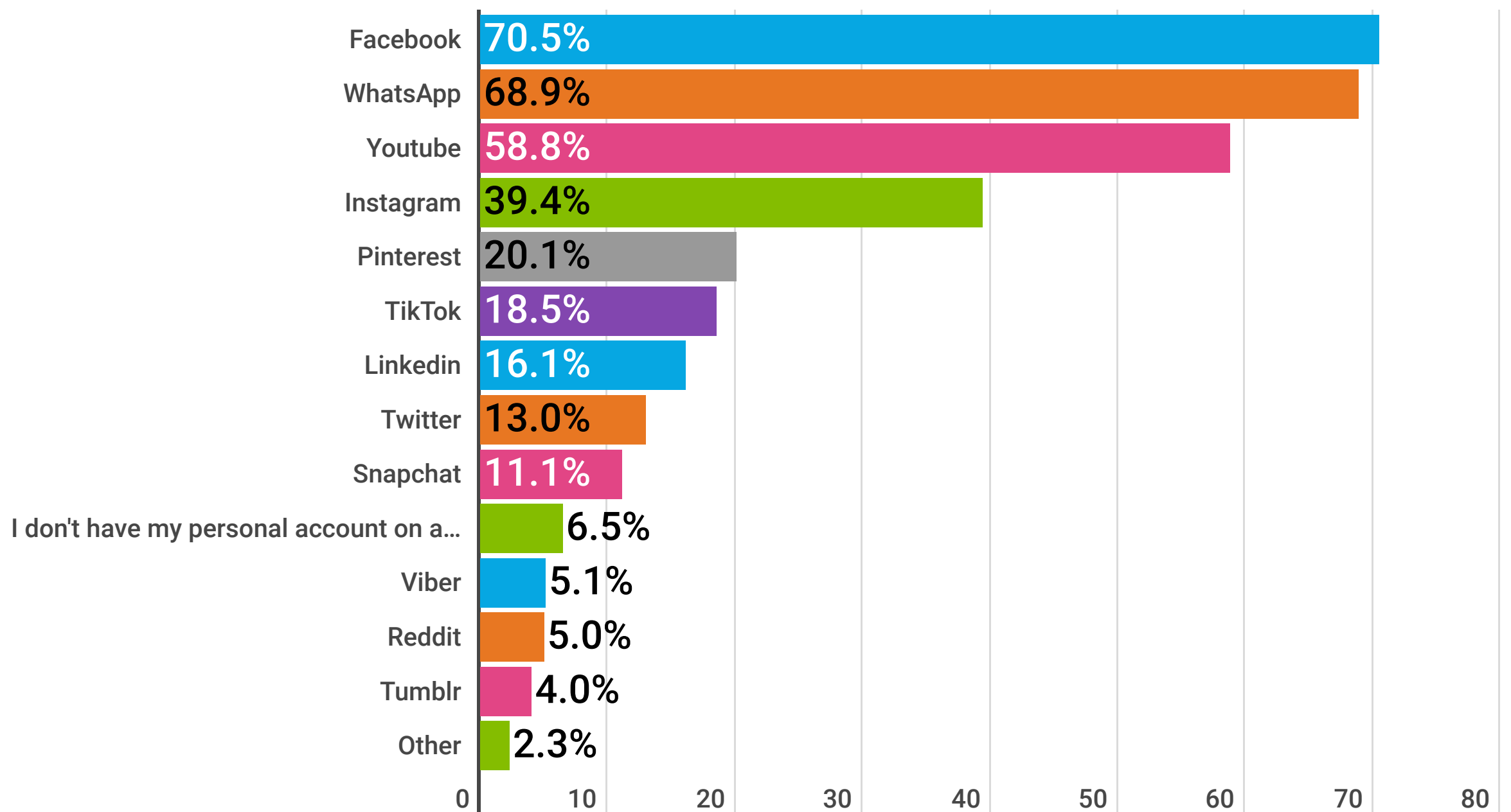
## Which of the mentioned activities you do online?



Source: gemiusAdHoc research, August 2020

N= 1056

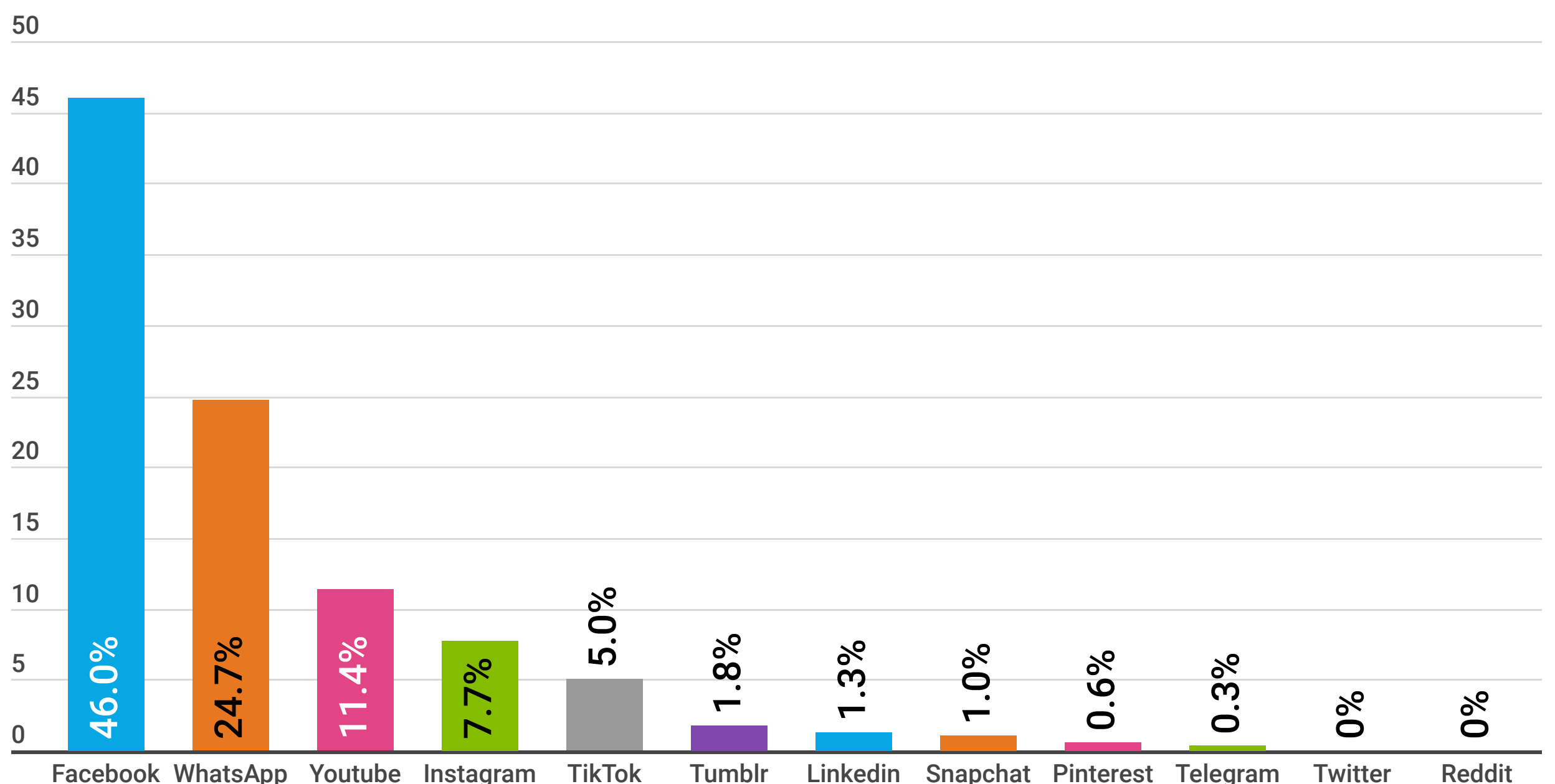
## On which social media sites you are active user?



Source: gemiusAdHoc research, August 2020

N= 1056

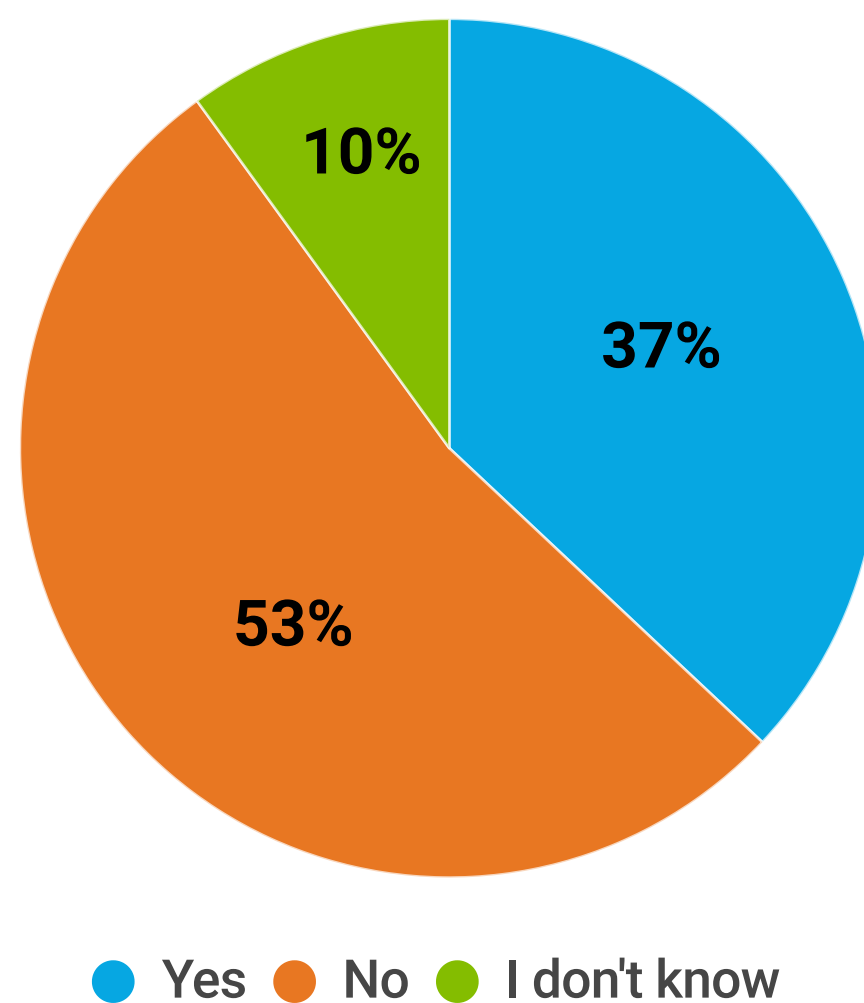
## Which of social media sites where you have a personal account are you visiting the most often?



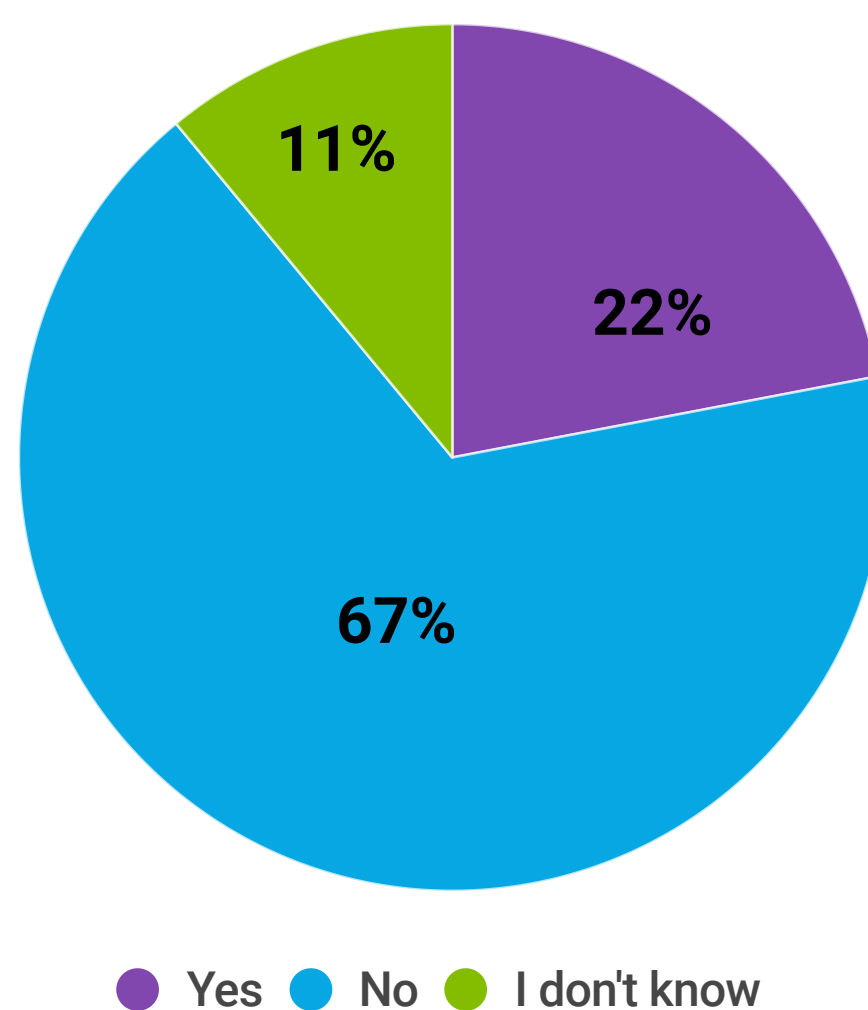
Source: gemiusAdHoc research, August 2020

N= 981

## Are you following Romanian influencer\* accounts on social media sites?



## Have you ever bought a product / ordered a service because it was recommended by an influencer\*?



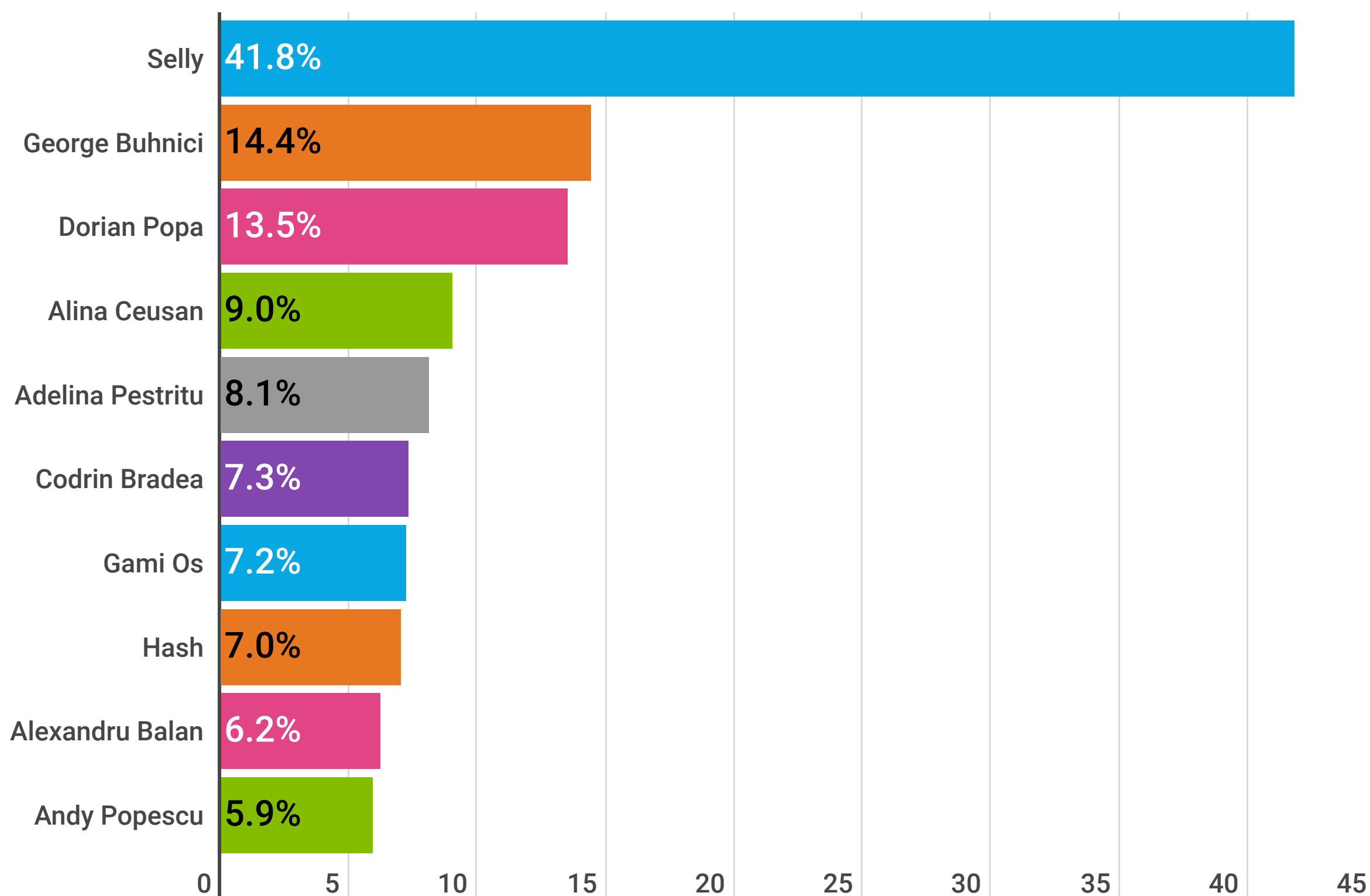
\*Influencer - the person who forms opinions on certain products, brands, or events)

Source: gemiusAdHoc research, August 2020

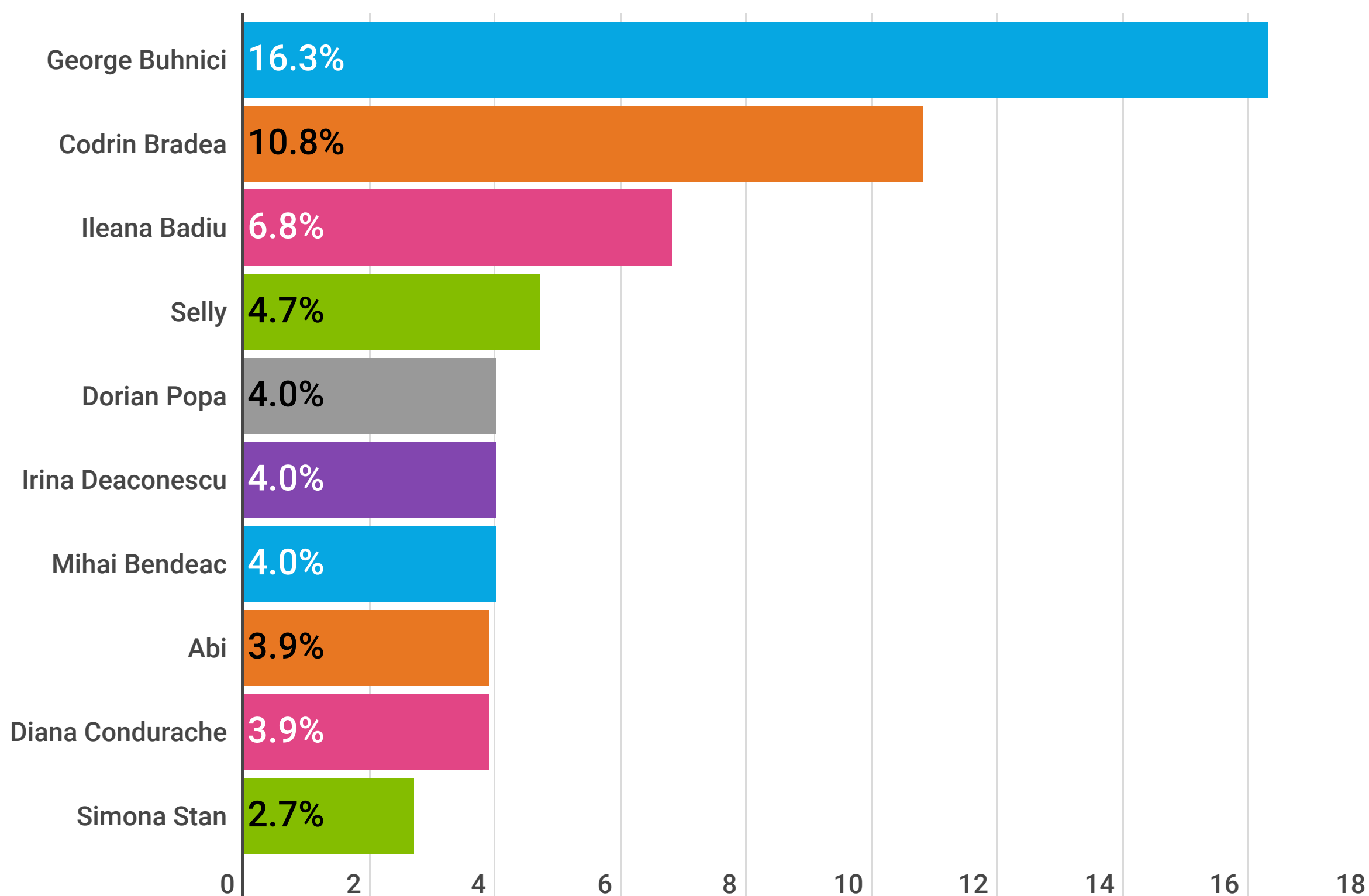
N= 1056



## TOP 10 Romanian influencers respondents know / have heard of



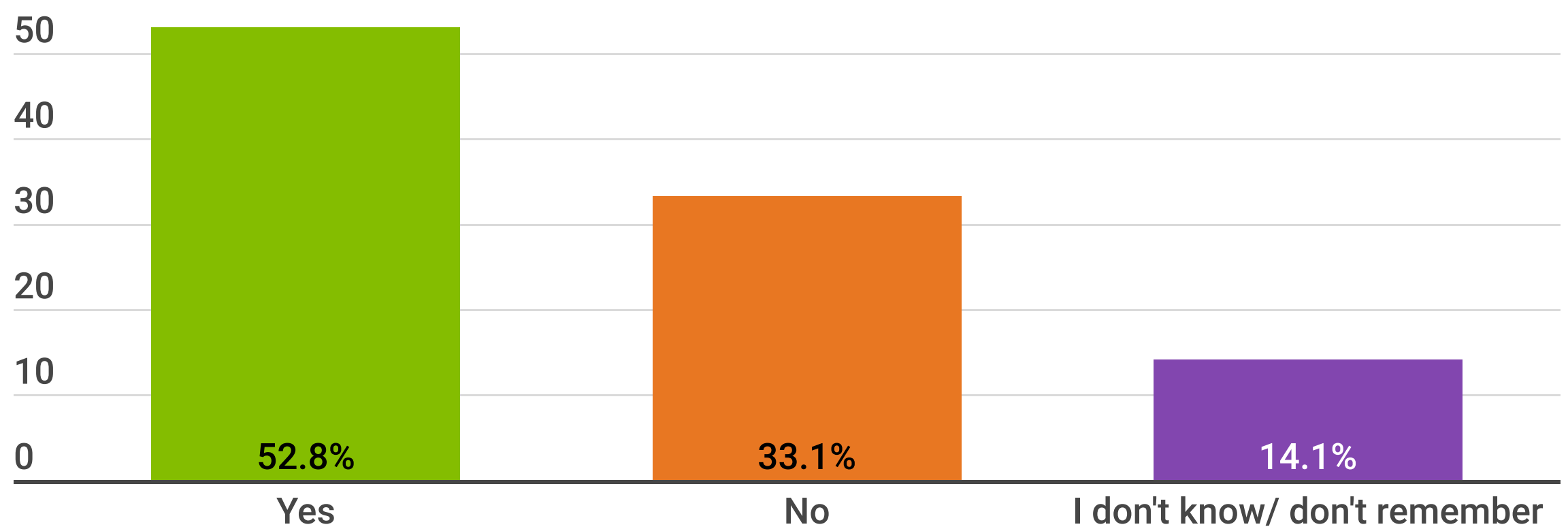
## TOP 10: In which Romanian influencer's recommendations you have the highest trust?



Source: gemiusAdHoc research, August 2020

N= 152

## Have you ever bought a product / ordered a service after you saw the advertisement online?

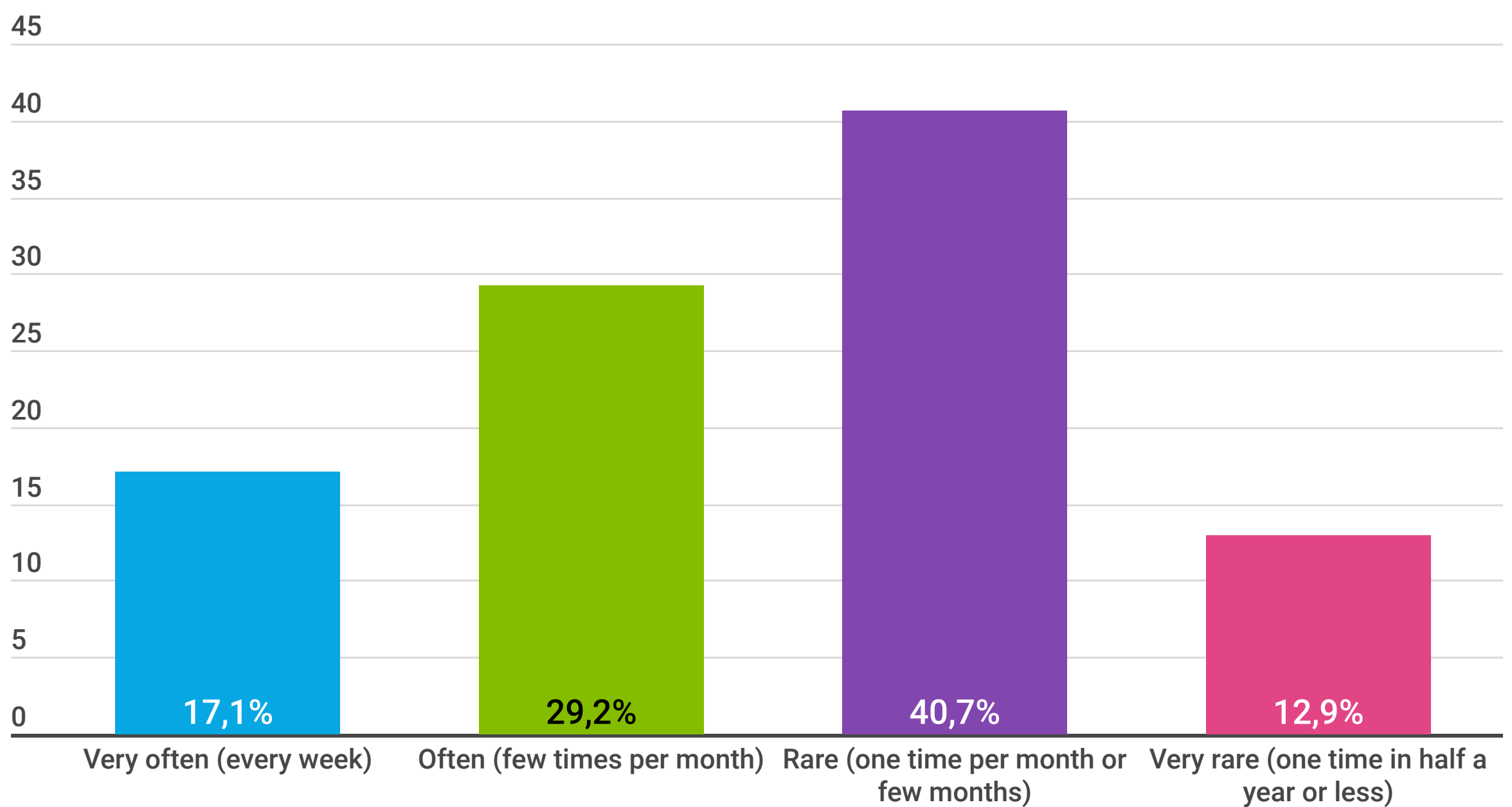




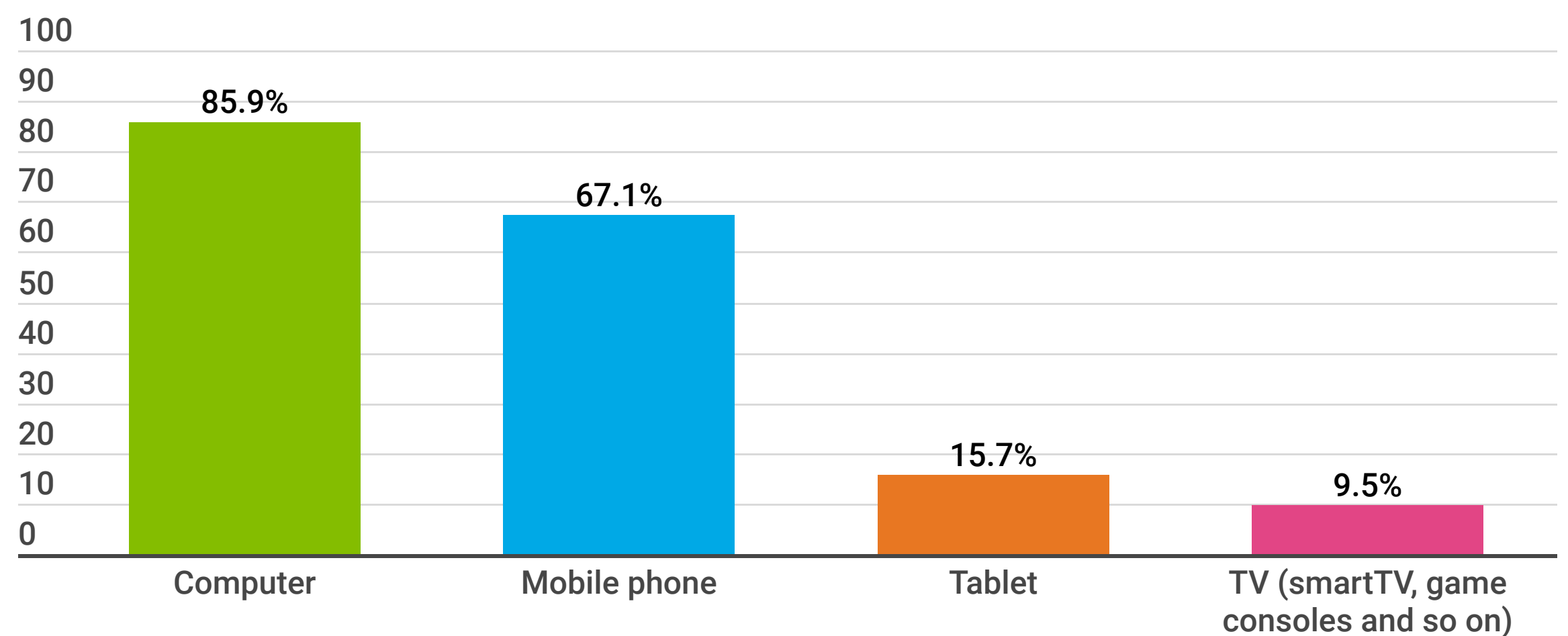
# Analysis of respondents who shop online



## How often do you purchase online?



## What devices do you use to shop online?

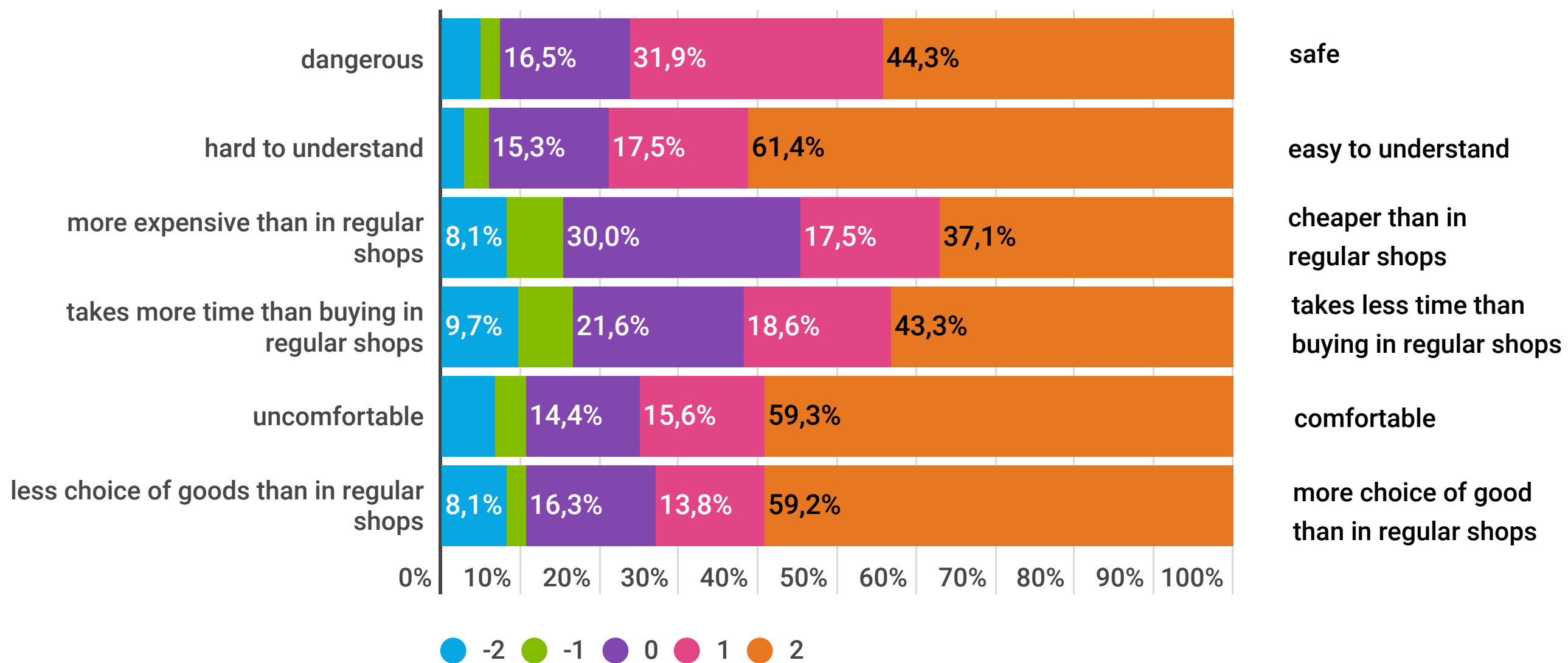


Source: gemiusAdHoc research, August 2020

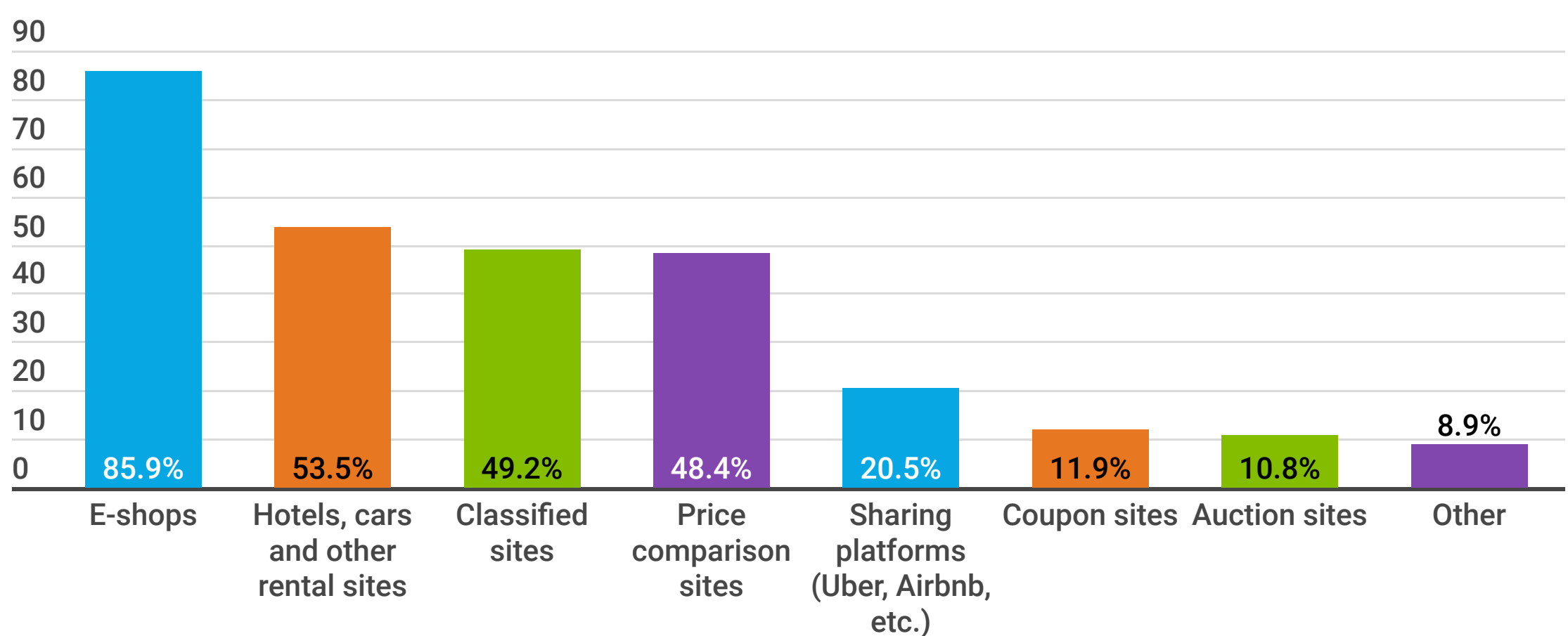
N= 825

## Please apprise buying online

(where -2 means that you approve with what is written in the left side, +2 mean that you approve with what is written in the right)

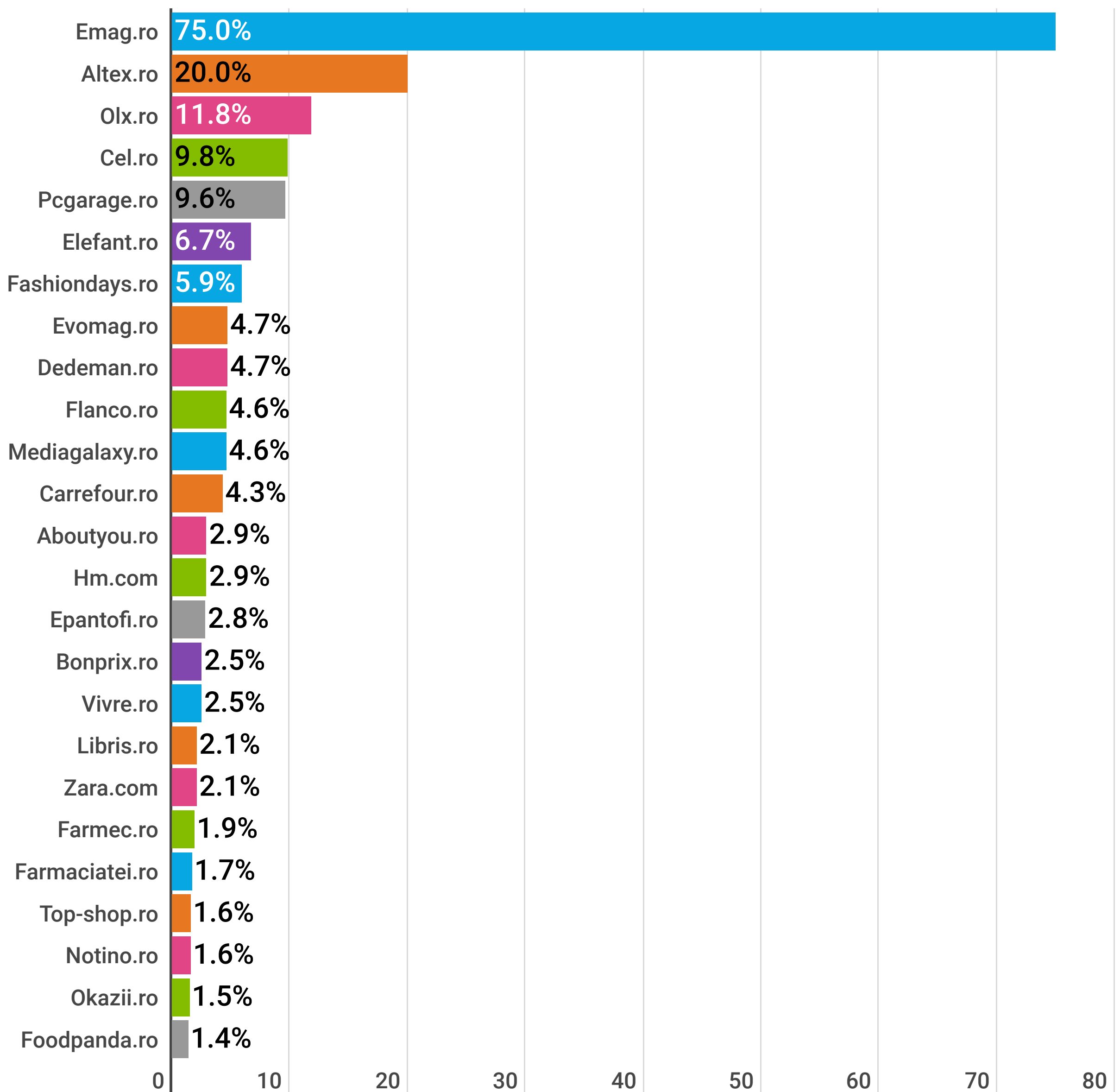


## Please indicate of the following types of e-commerce sites the ones that you have personally used





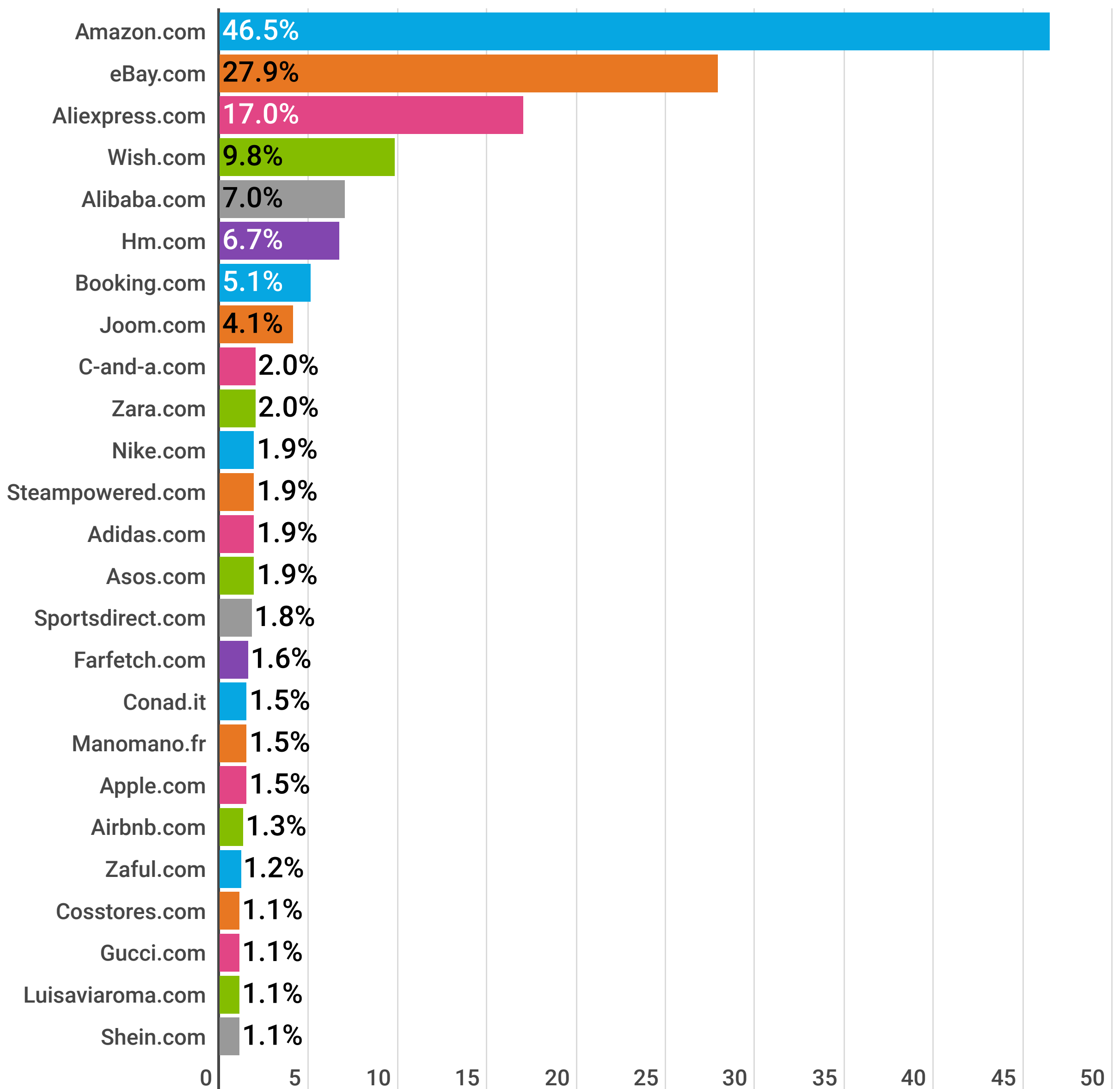
## TOP 25 Romanian e-commerce pages



Source: gemiusAdHoc research, August 2020

N= 636

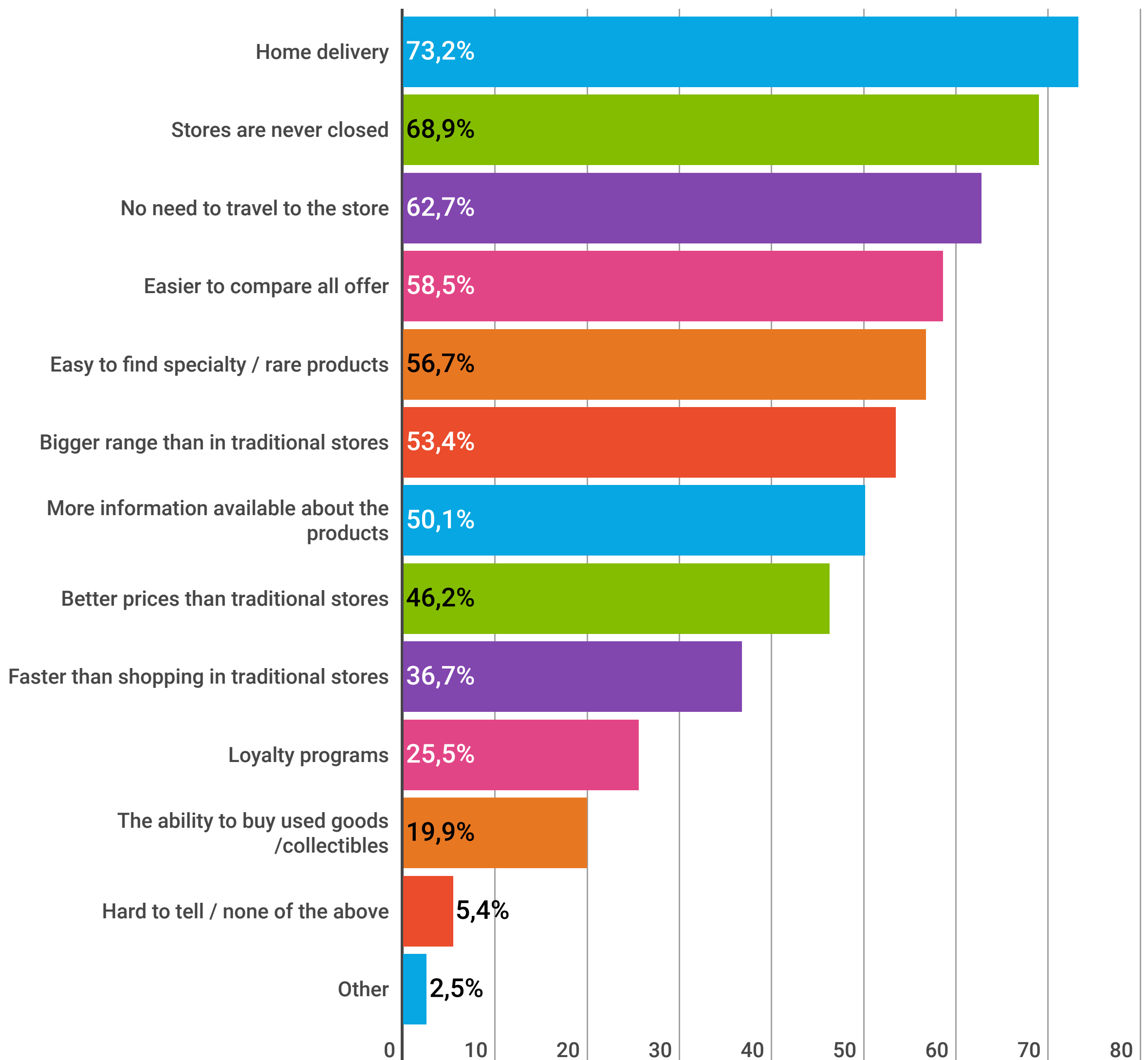
## TOP 25 foreign e-commerce pages



Source: gemiusAdHoc research, August 2020

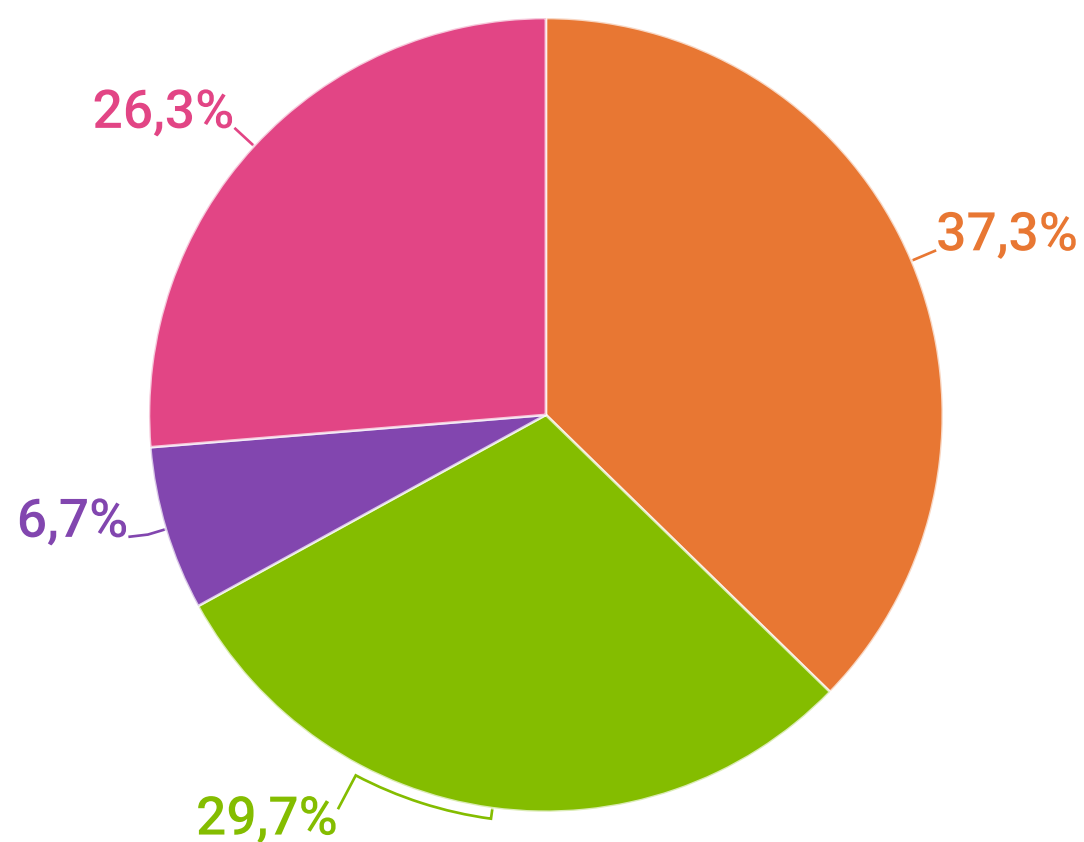
N= 583

## What motivates you to shop online?





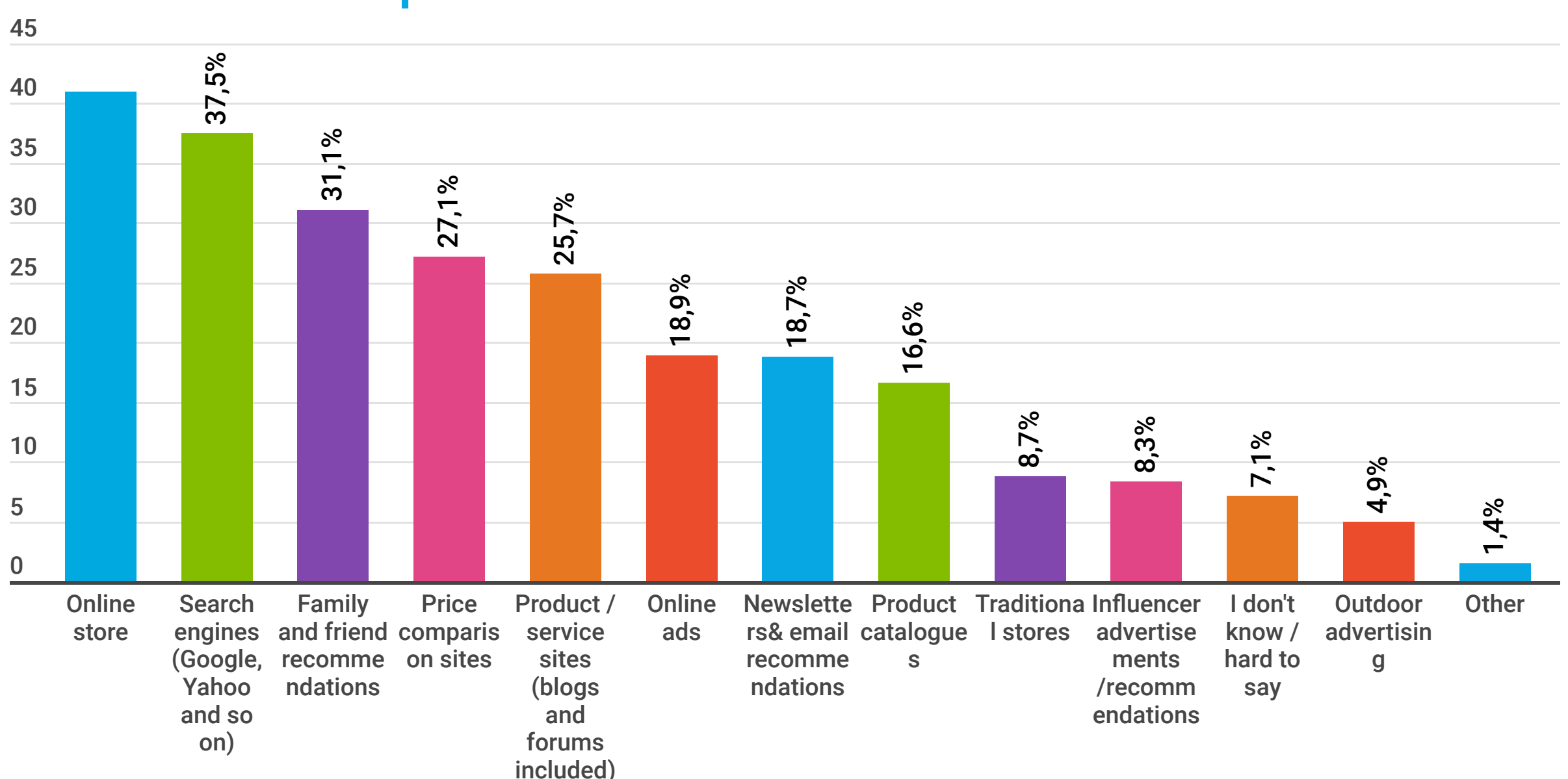
## How do you think your spending online will change in the next year?



- It will increase
- It won't change
- It will decrease
- I don't know / hard to say



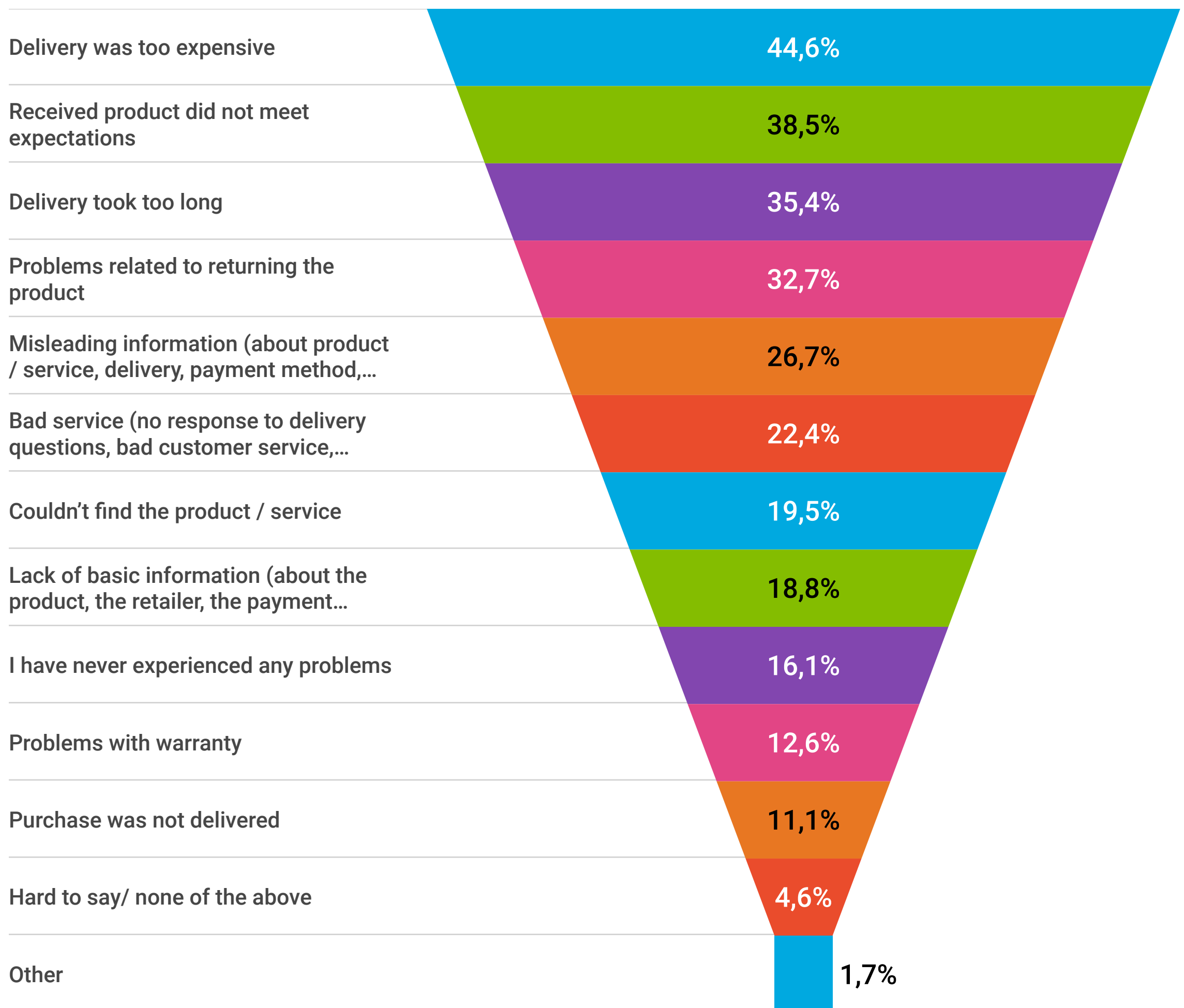
## Please indicate three most important sources of information that affect your decision before making a purchase in e-commerce stores



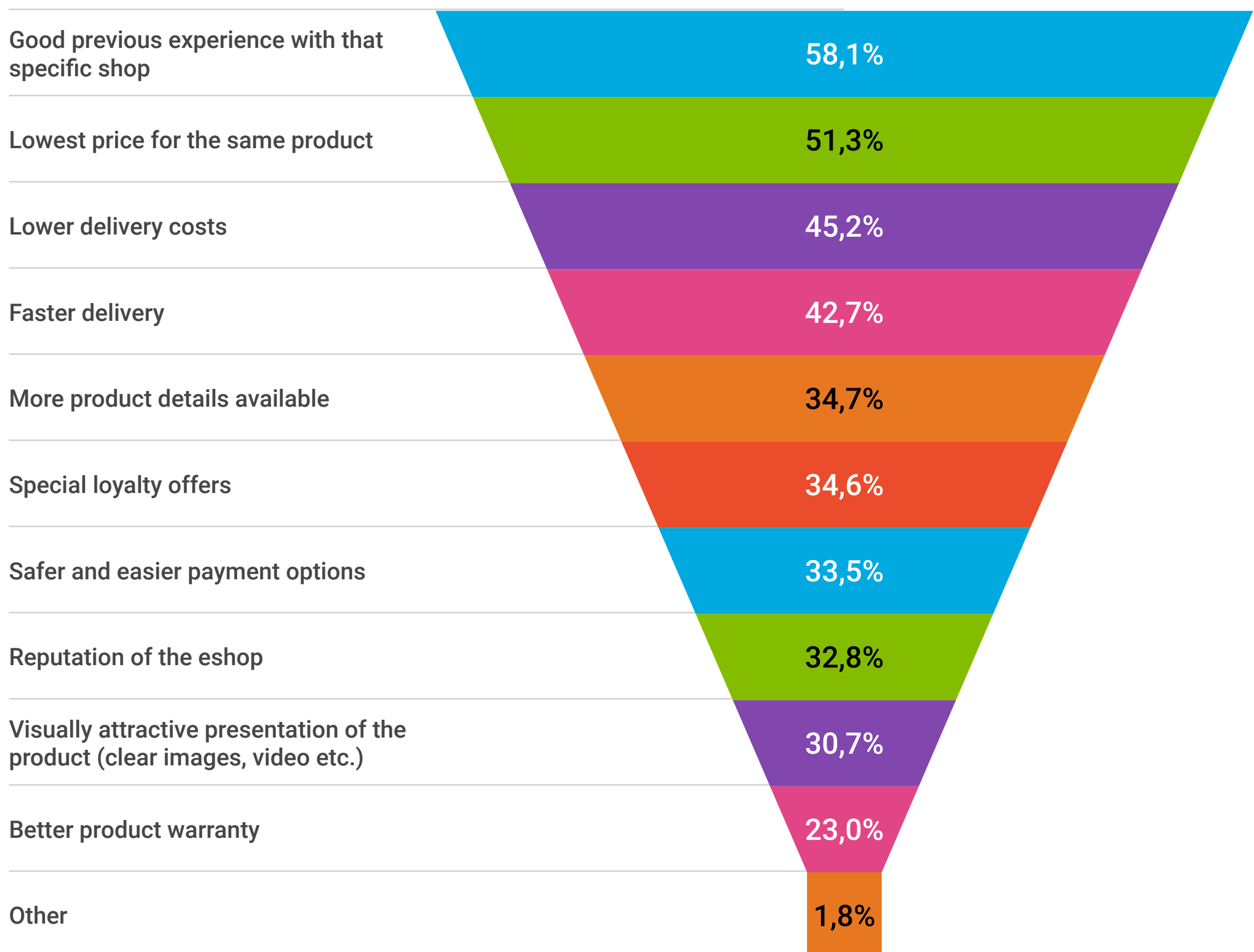
Source: gemiusAdHoc research, August 2020

N= 825

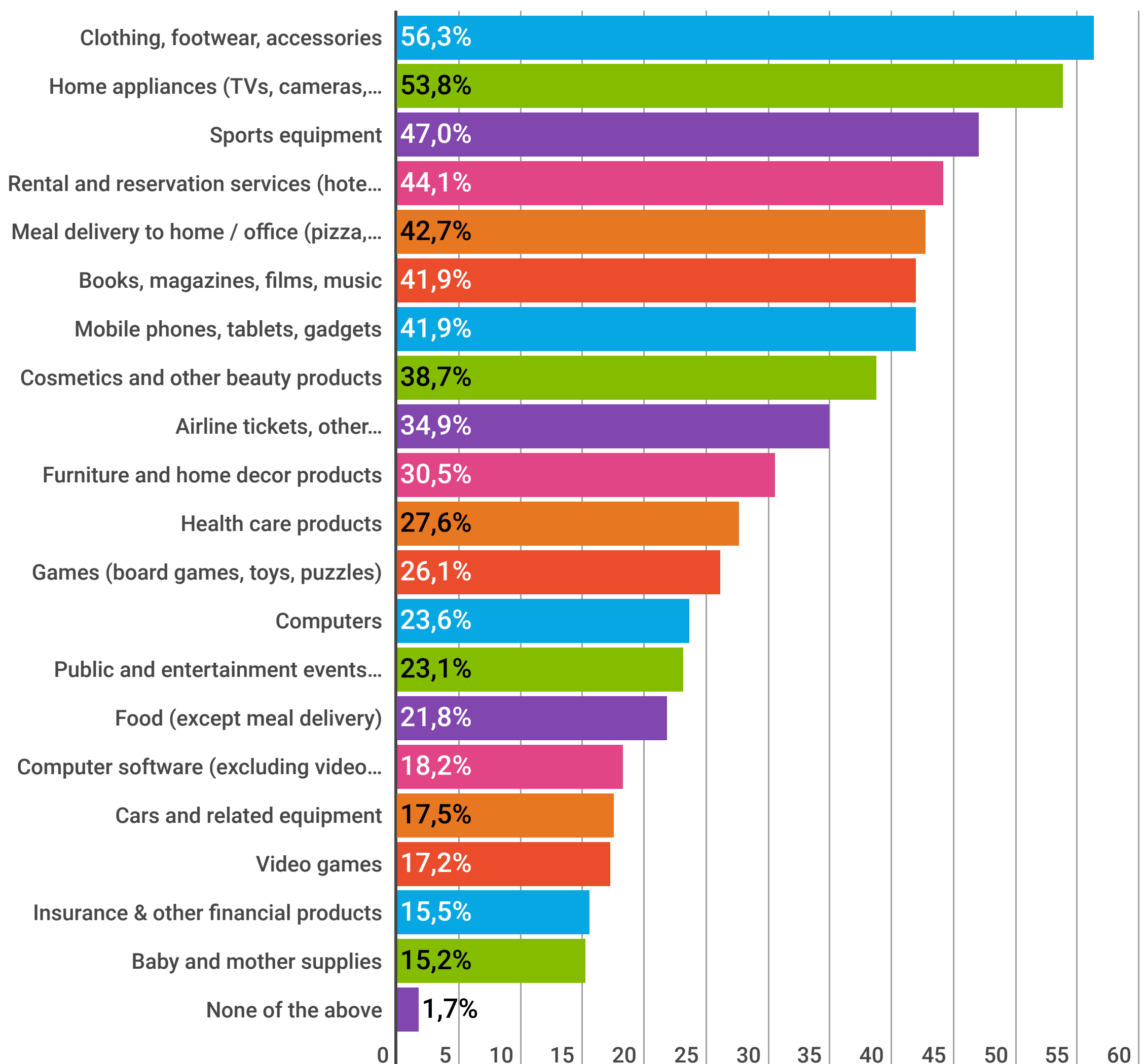
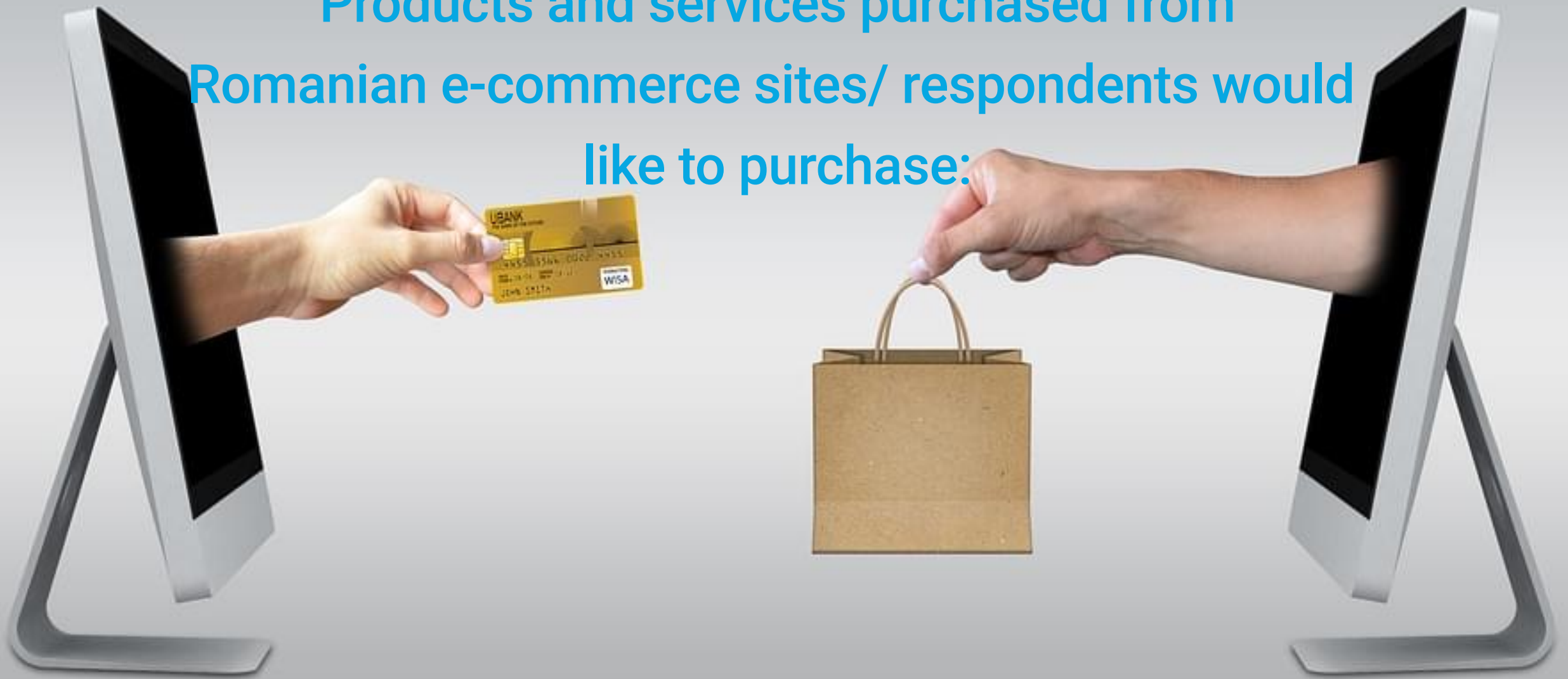
## Difficulties and problems related to shopping online



## What motivates you to choose a particular online shop, instead of another who sells the same product you want to buy?



## Products and services purchased from Romanian e-commerce sites/ respondents would like to purchase:





AVON

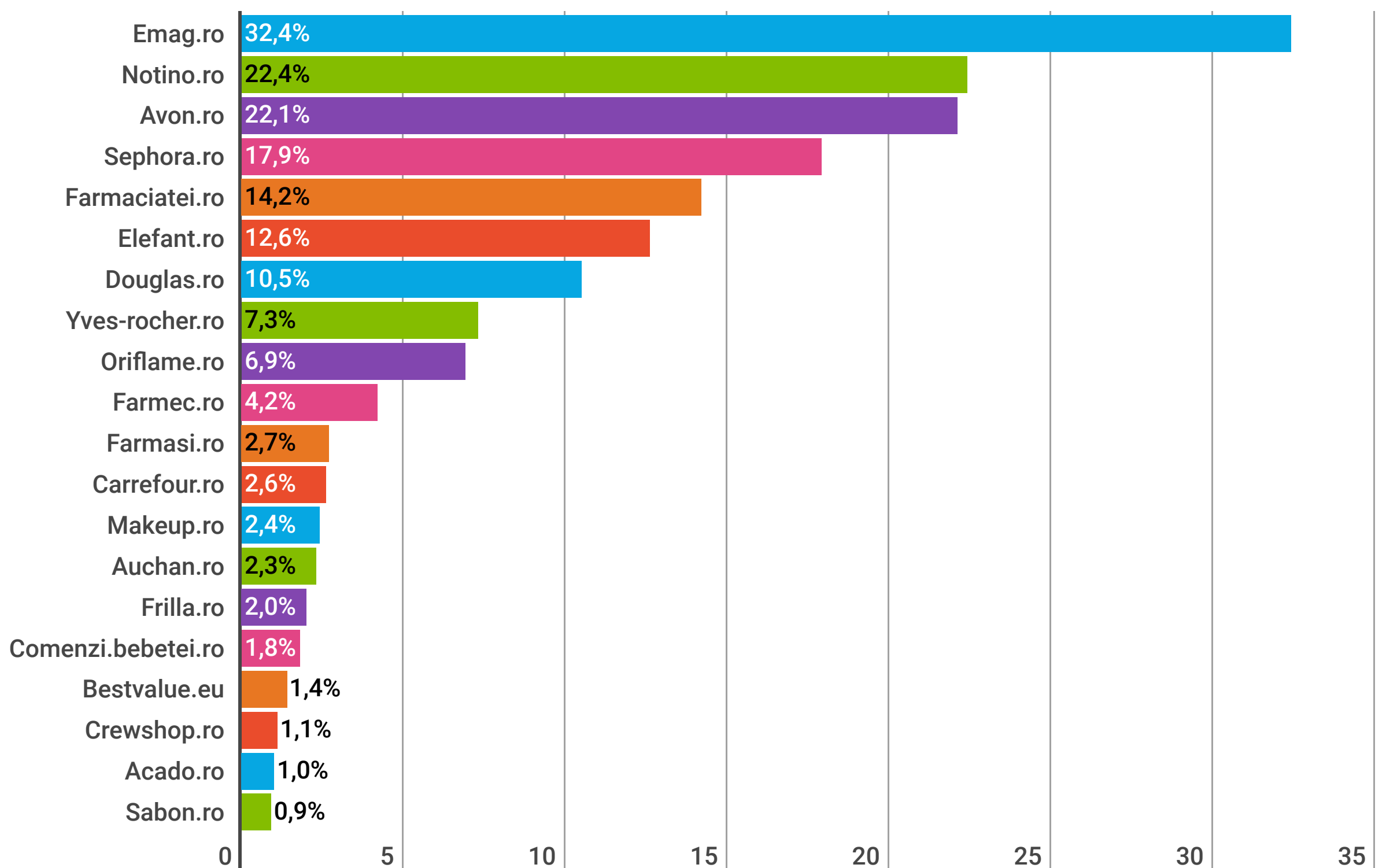


*Prinde valul de*  
**REDUCERI!**

**COMANDĂ ACASĂ**



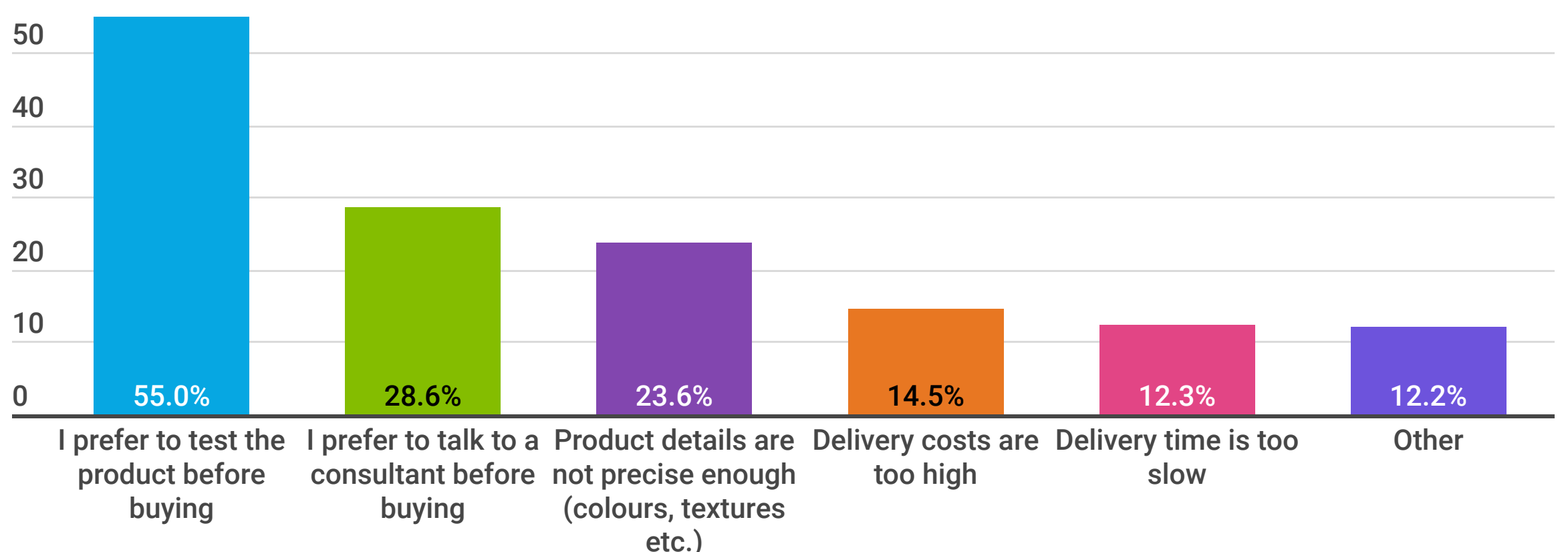
## Please indicate 3 online shops where you usually buy cosmetics and other beauty products



Source: gemiusAdHoc research, August 2020

N= 305

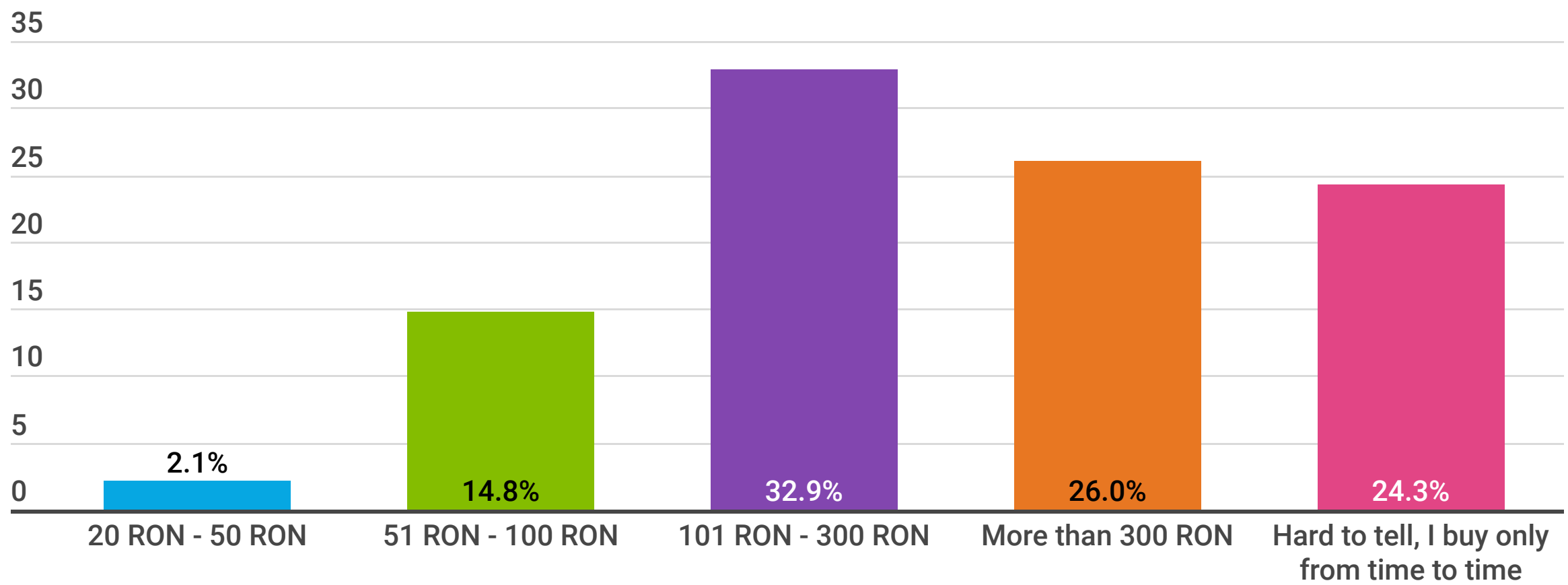
## What are the reasons that stop you from buying cosmetics and other beauty products online?



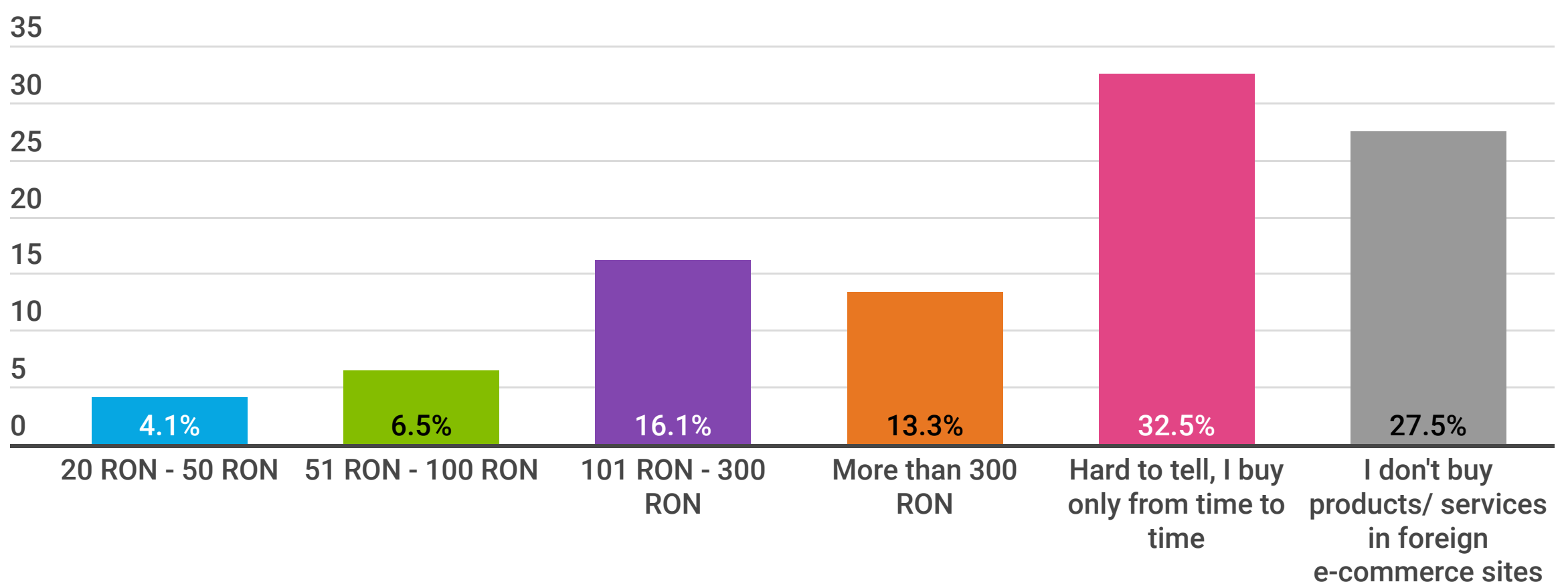
Source: gemiusAdHoc research, August 2020

N= 737

## How much do you spend on online shopping in Romanian e-commerce sites per month?



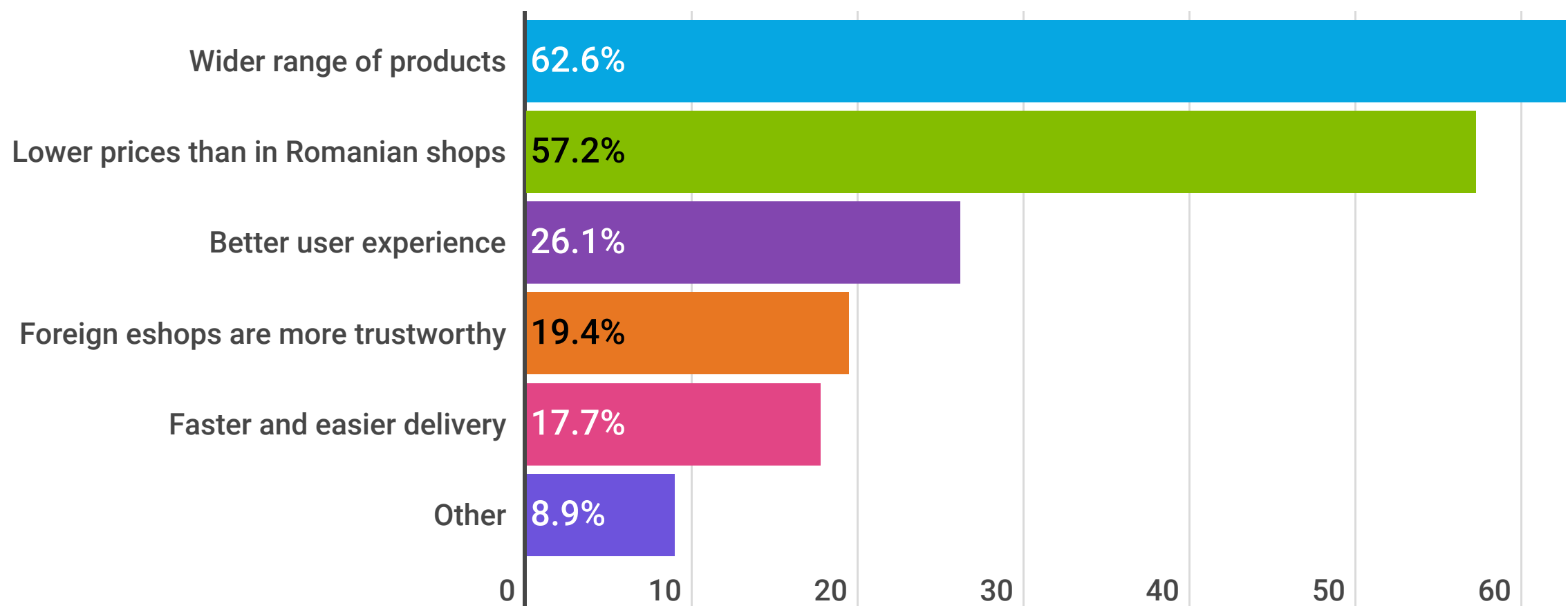
## How much do you spend on online shopping in foreign e-commerce sites per month?



Source: gemiusAdHoc research, August 2020

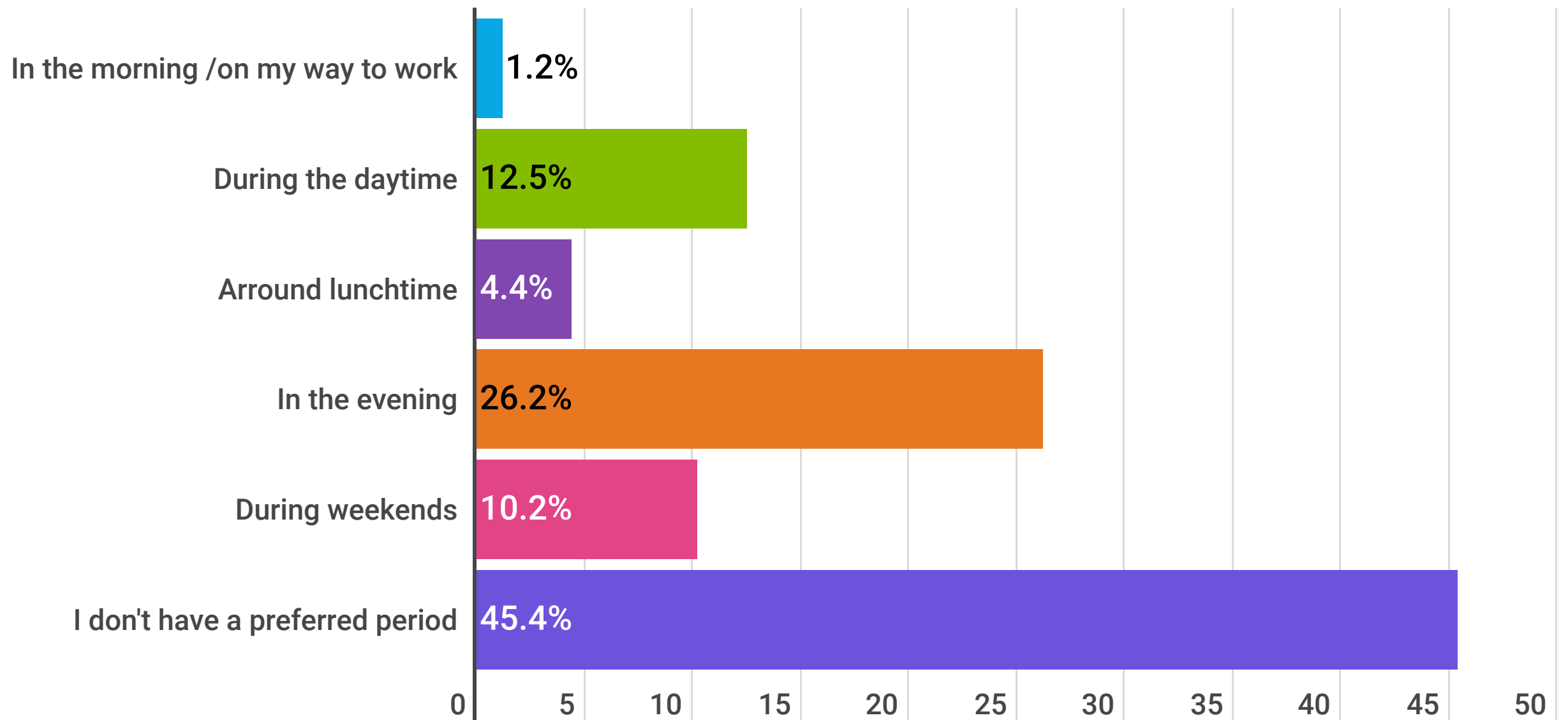
N= 825

## What motivates you to shop in foreign online stores?

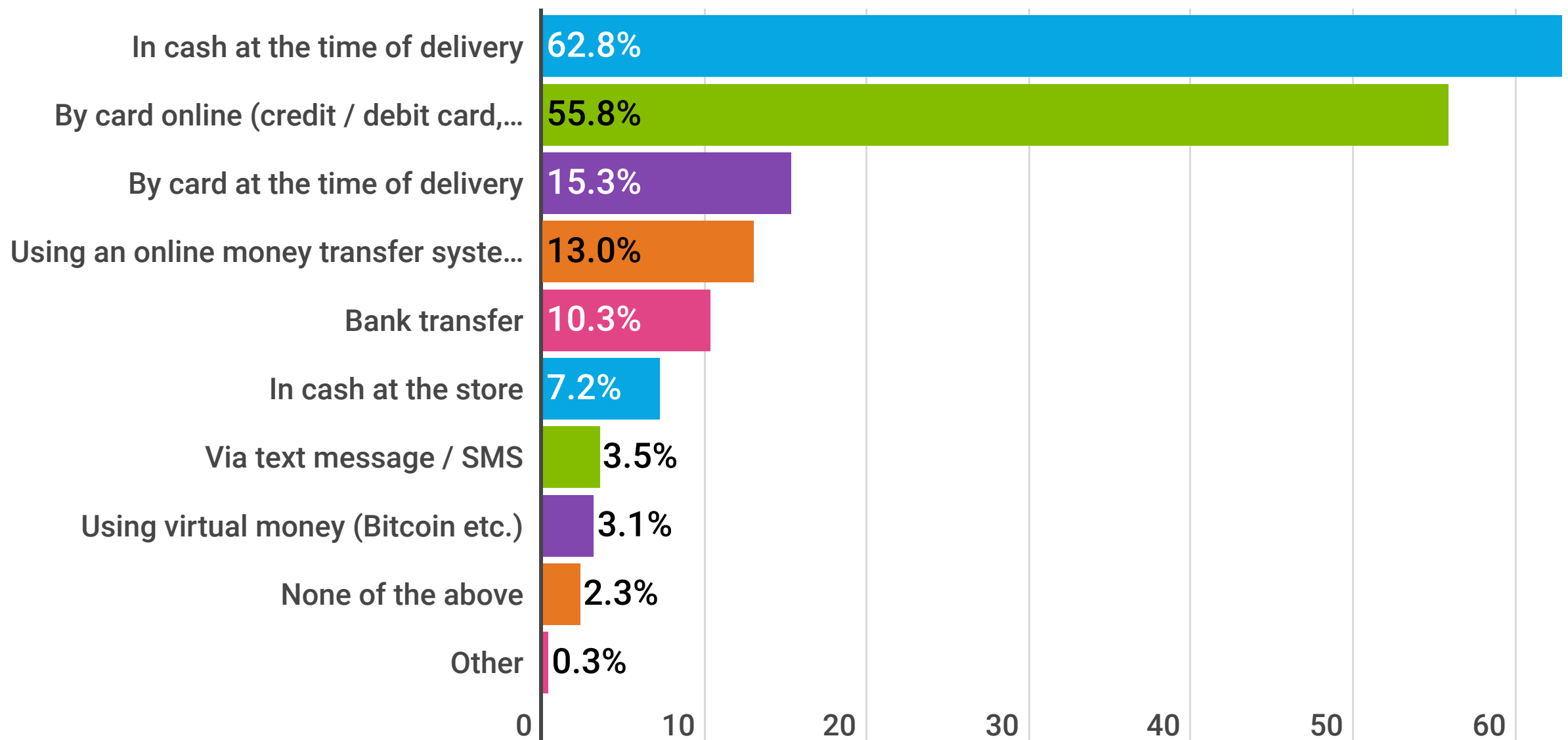




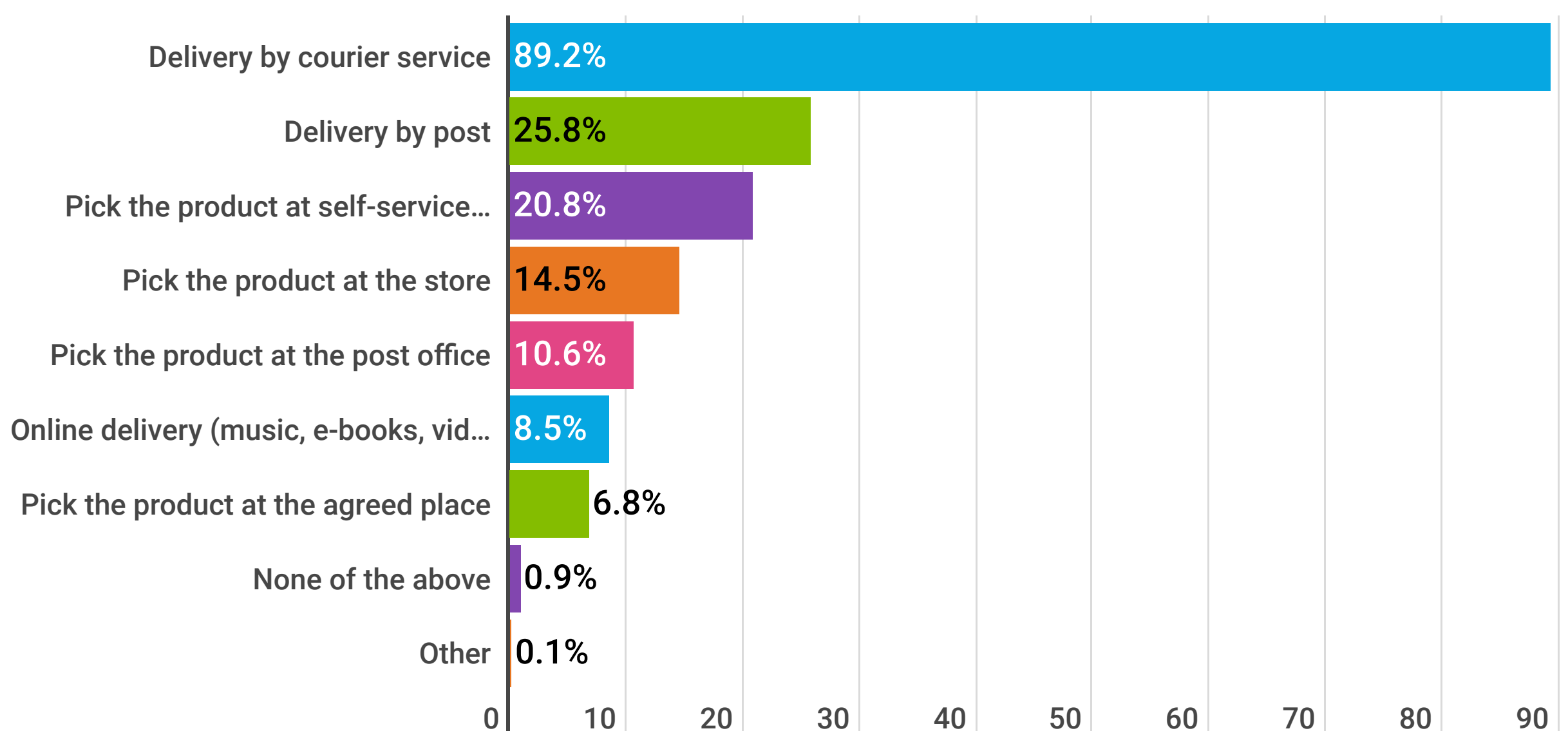
## Do you have a preferred time of the day/ week for online shopping?



## Which of the mentioned payment options you would prefer to use to make purchases online?



## Which of the mentioned delivery options you would prefer to use to make purchases online?

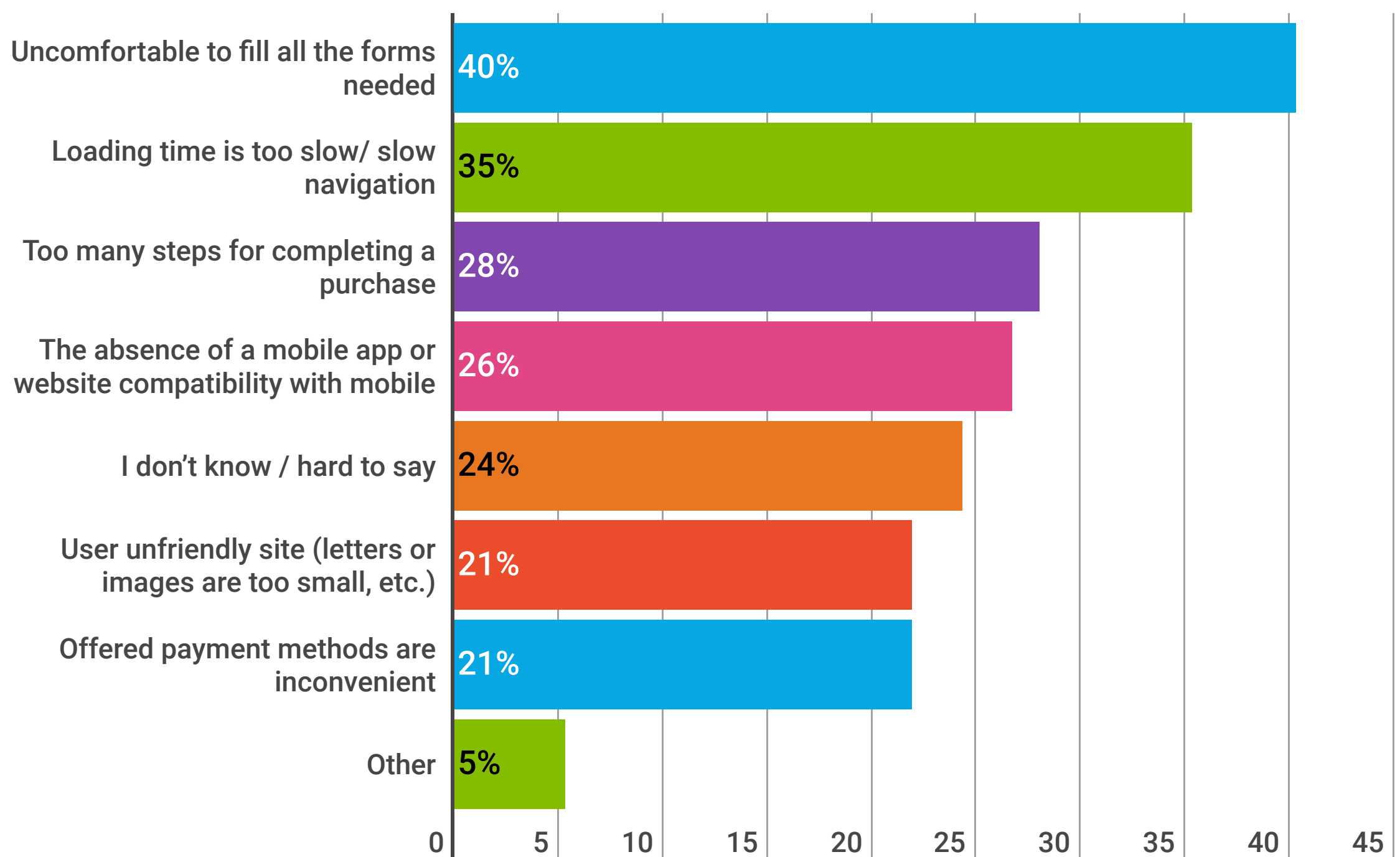




# **Analysis of respondents who shop online using mobile devices**



## What difficulties and problems have you encountered while shopping online from mobile devices?

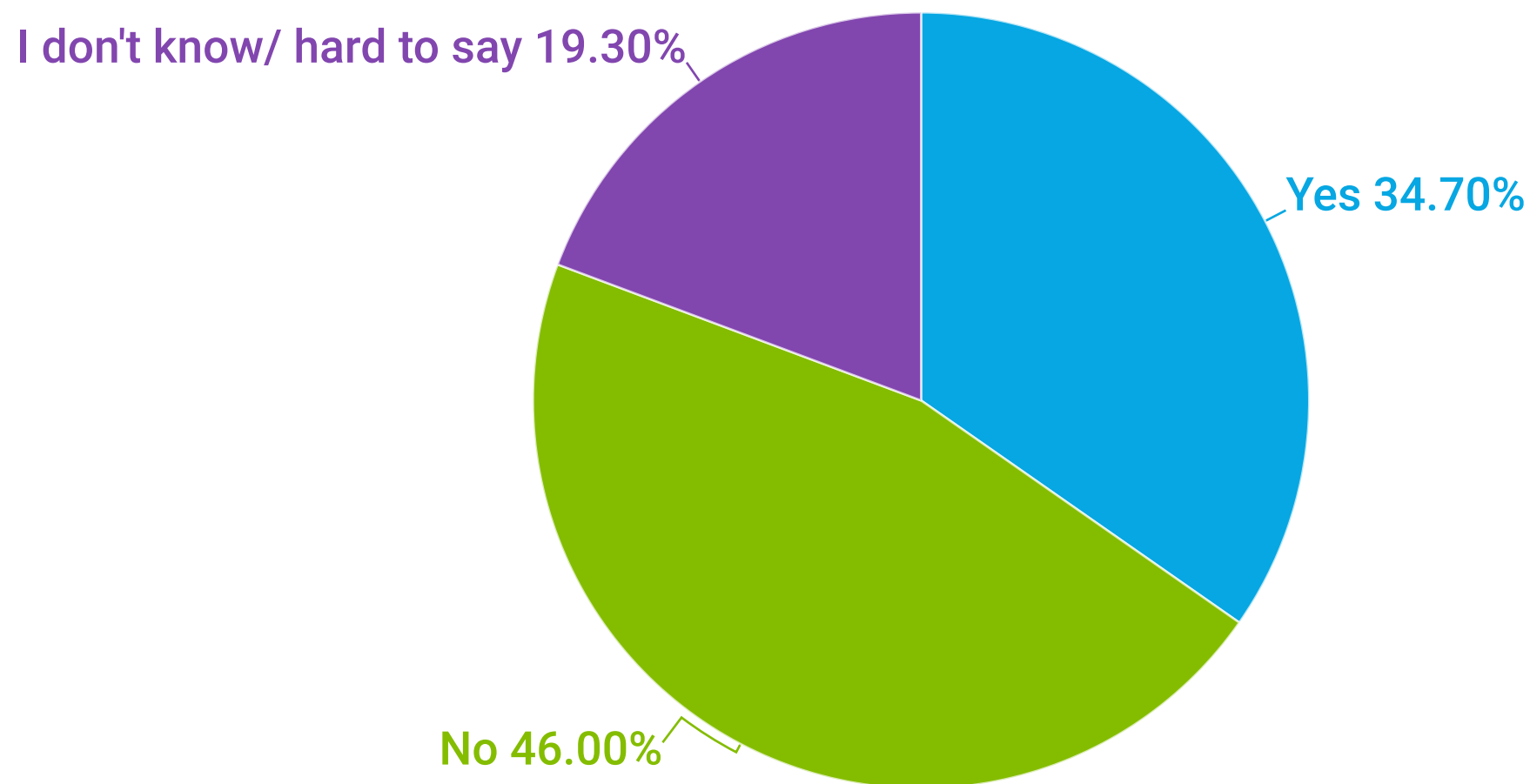


Source: gemiusAdHoc research, August 2020

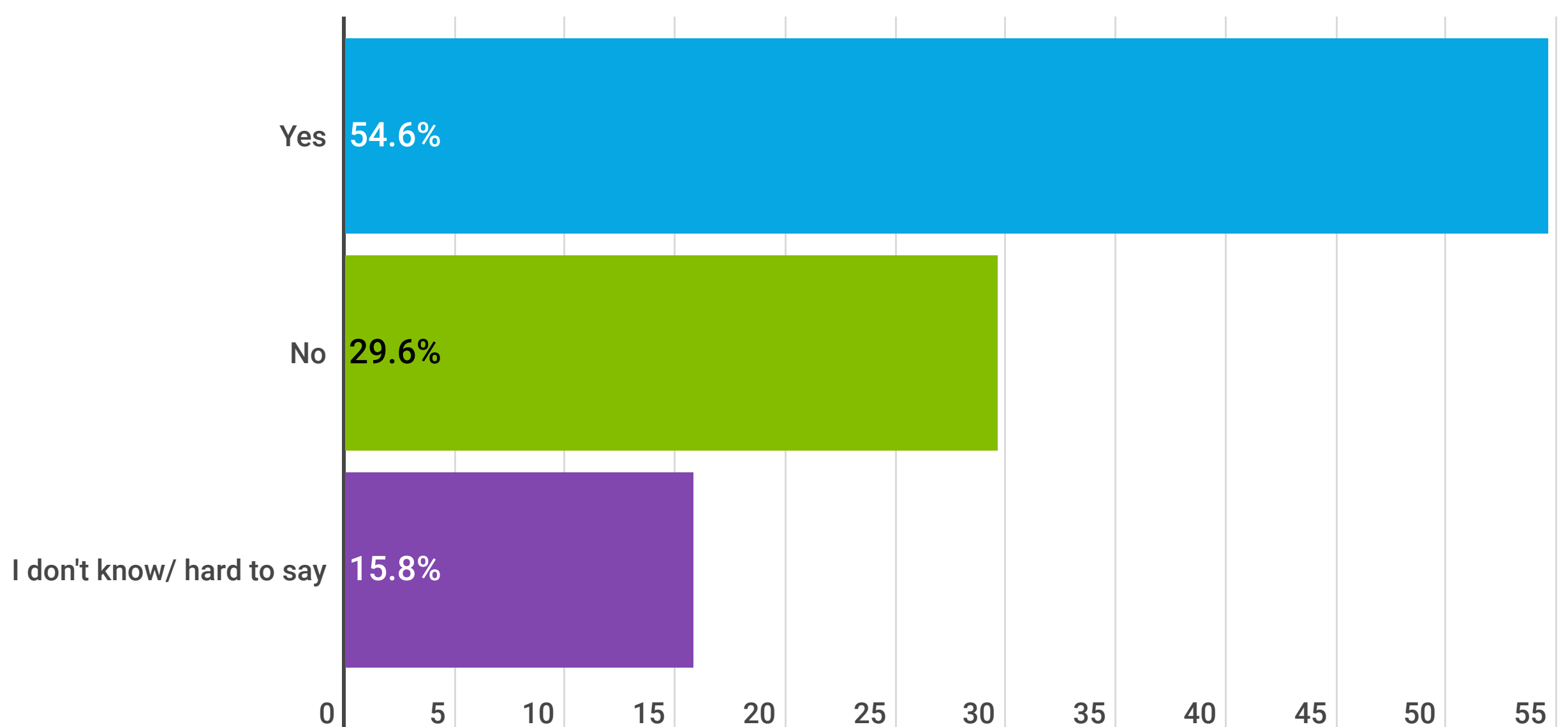
N= 586



## Do you often start to buy something online via phone and complete the buying process via computer?



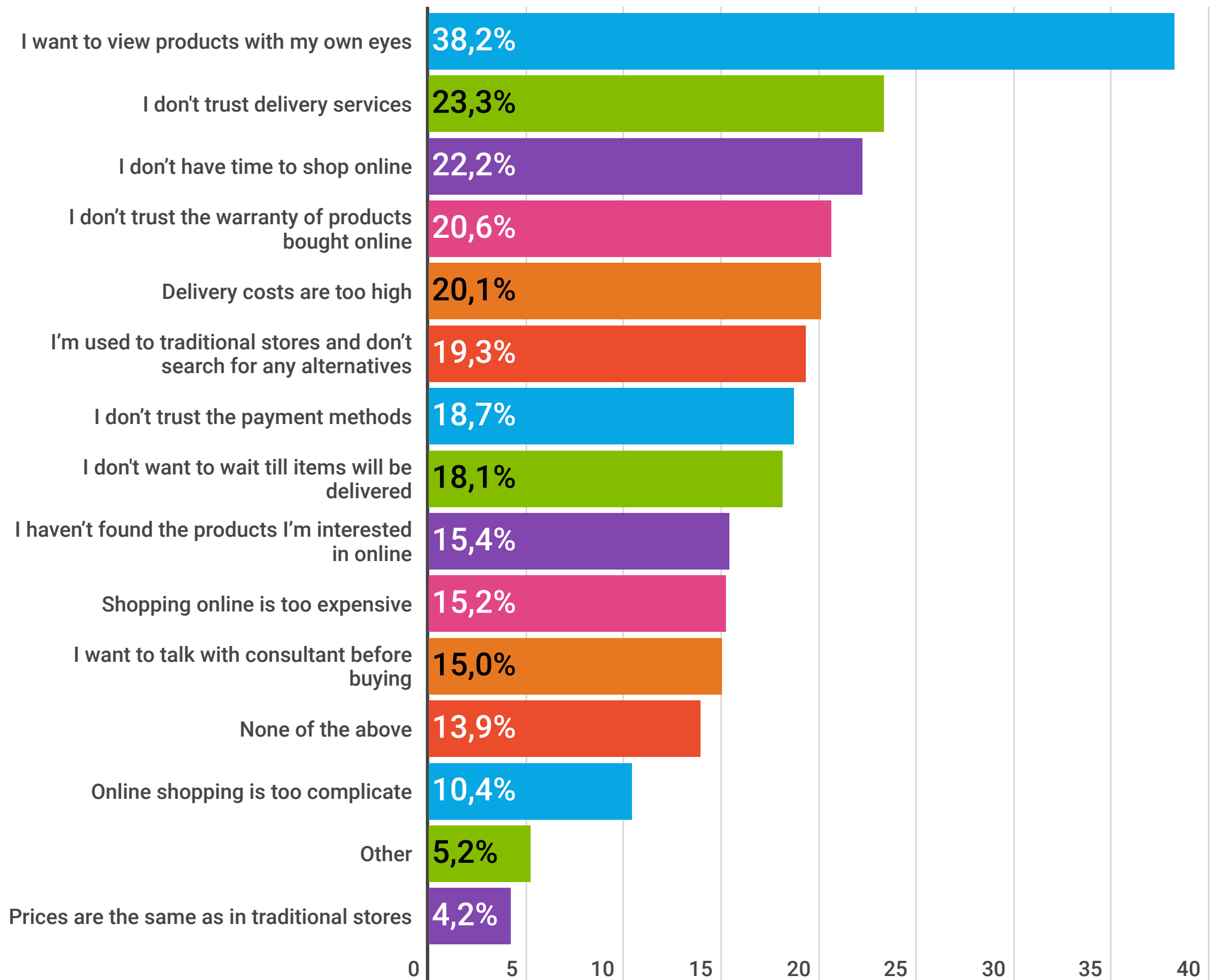
## Do you often compare the prices of the same products on your mobile phone / tablet when you buy from traditional stores?



# Analysis of respondents who do not shop online



## What are the reasons you have not made any purchases online?

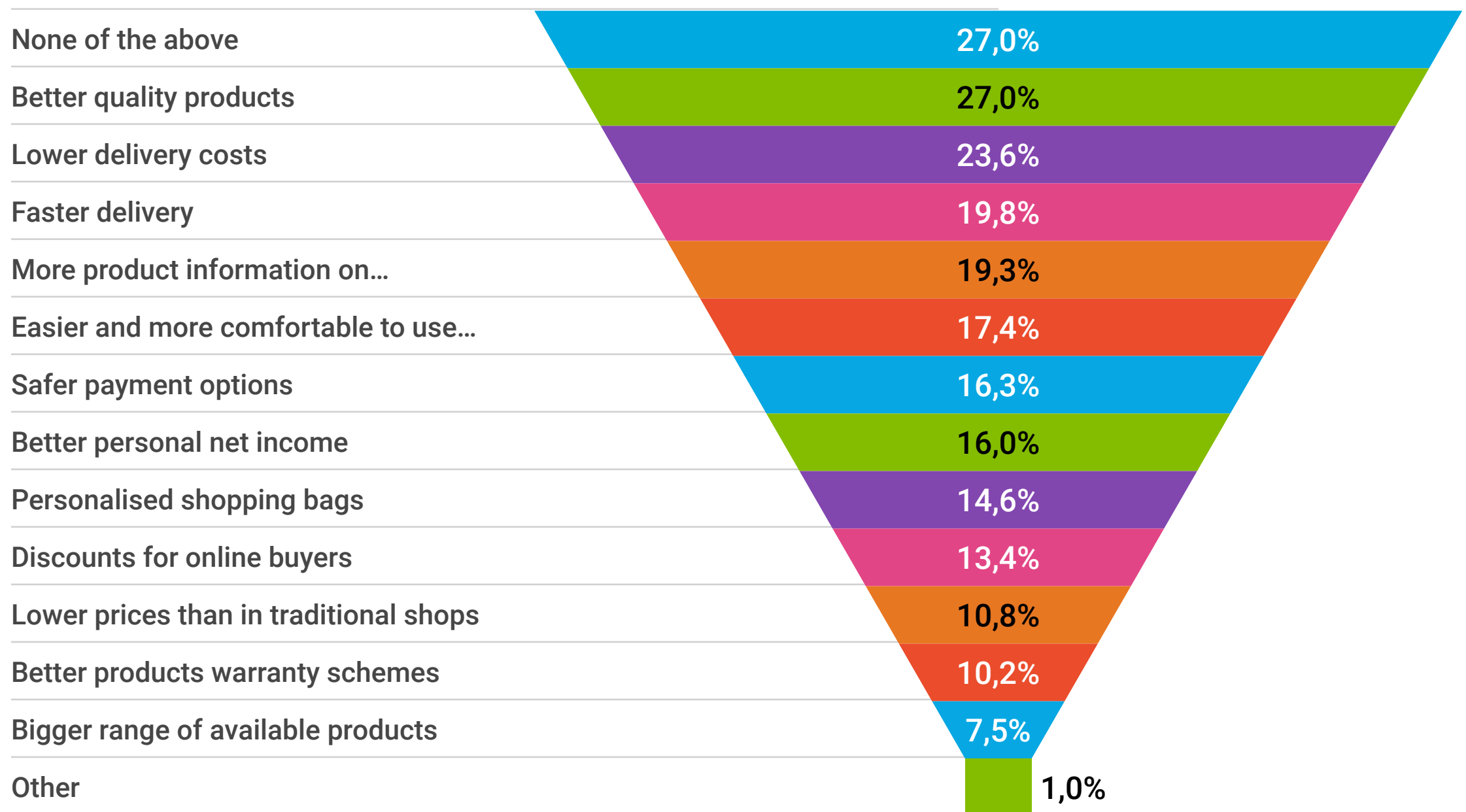


Source: gemiusAdHoc research, August 2020

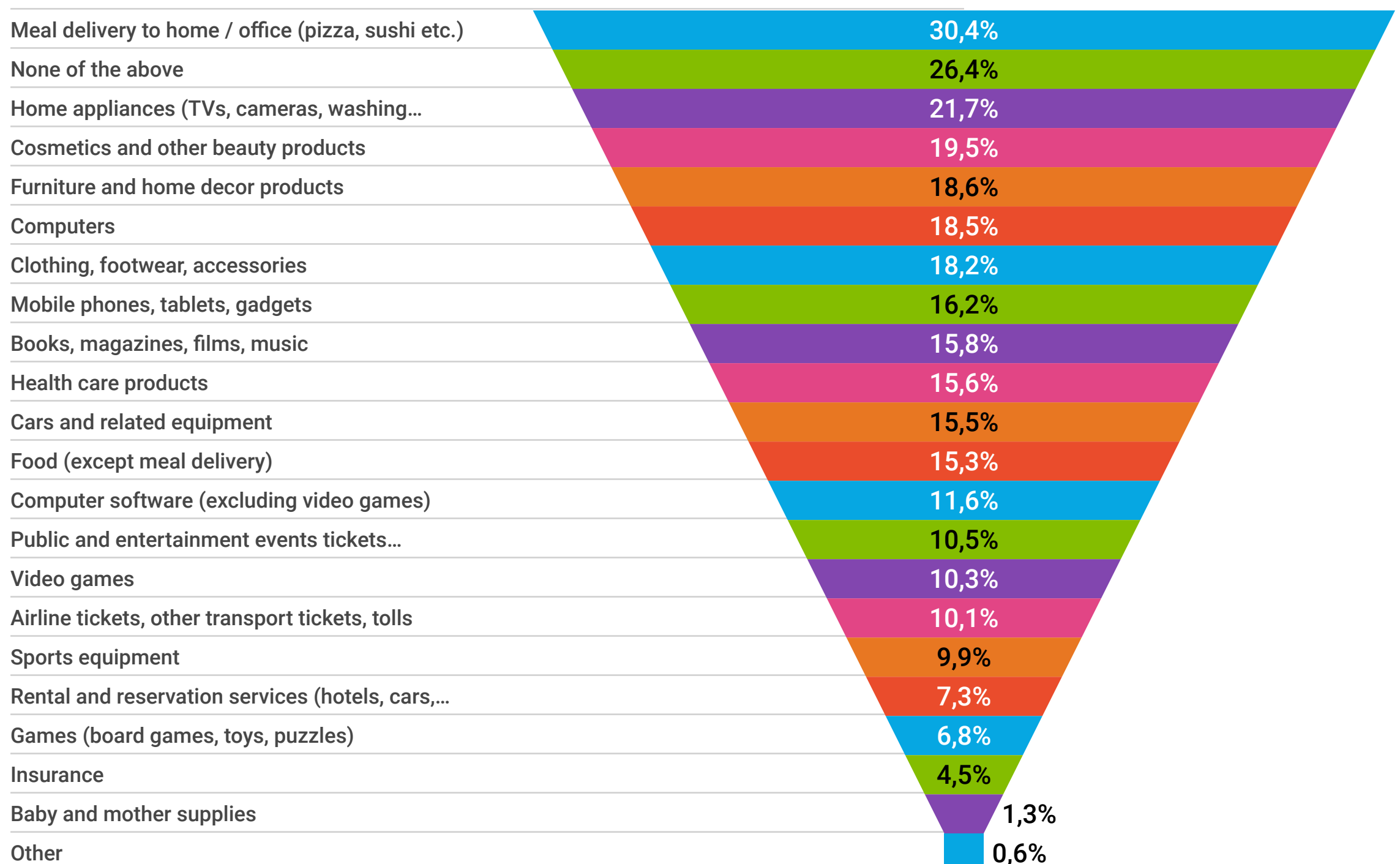
N= 231



## What would motivate you to start shopping online?



## Which products would interest you?

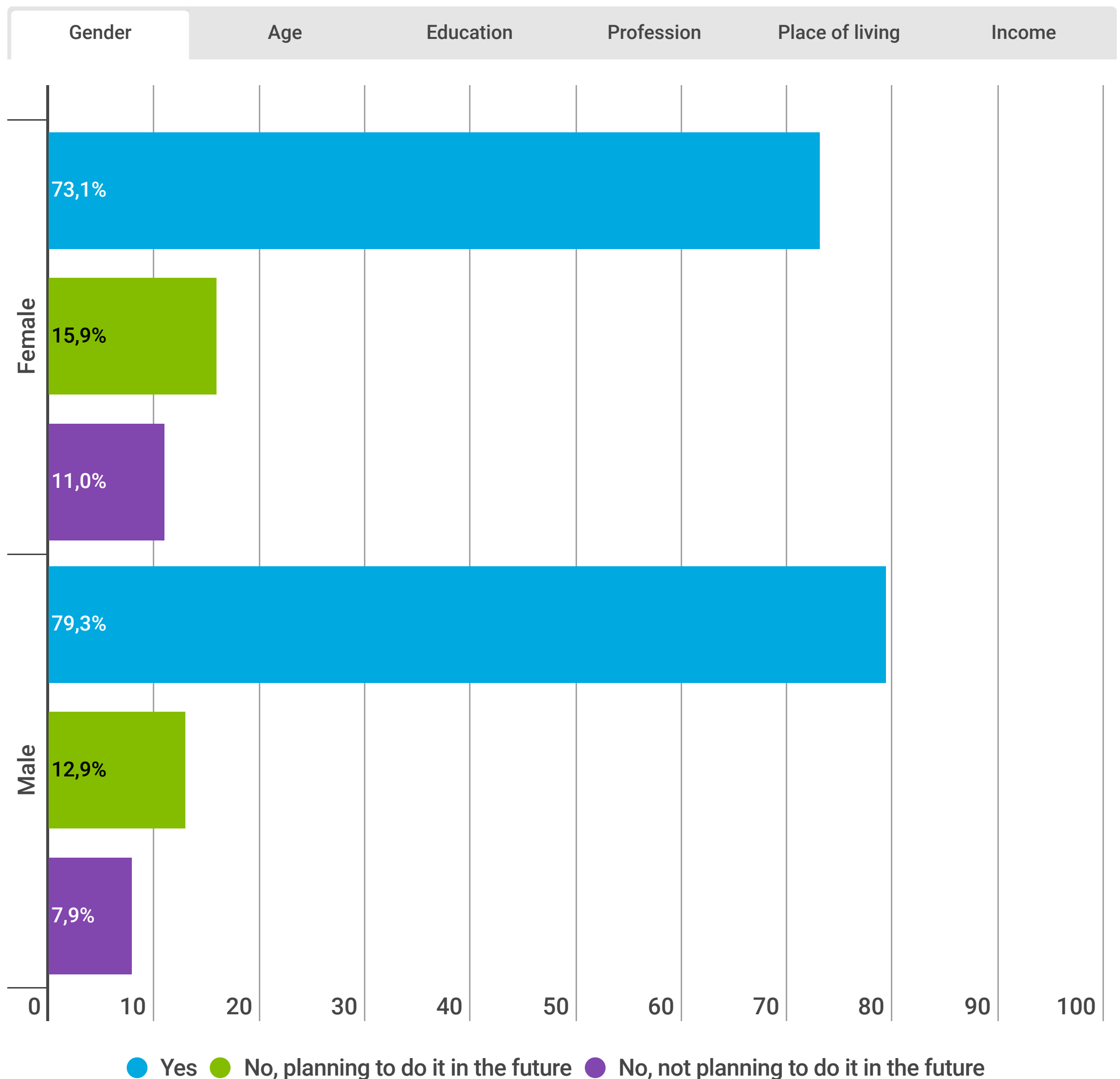




# **Data junctions and comparisons before and during Covid-19**



## Before Covid-19: Have you made any purchase online?



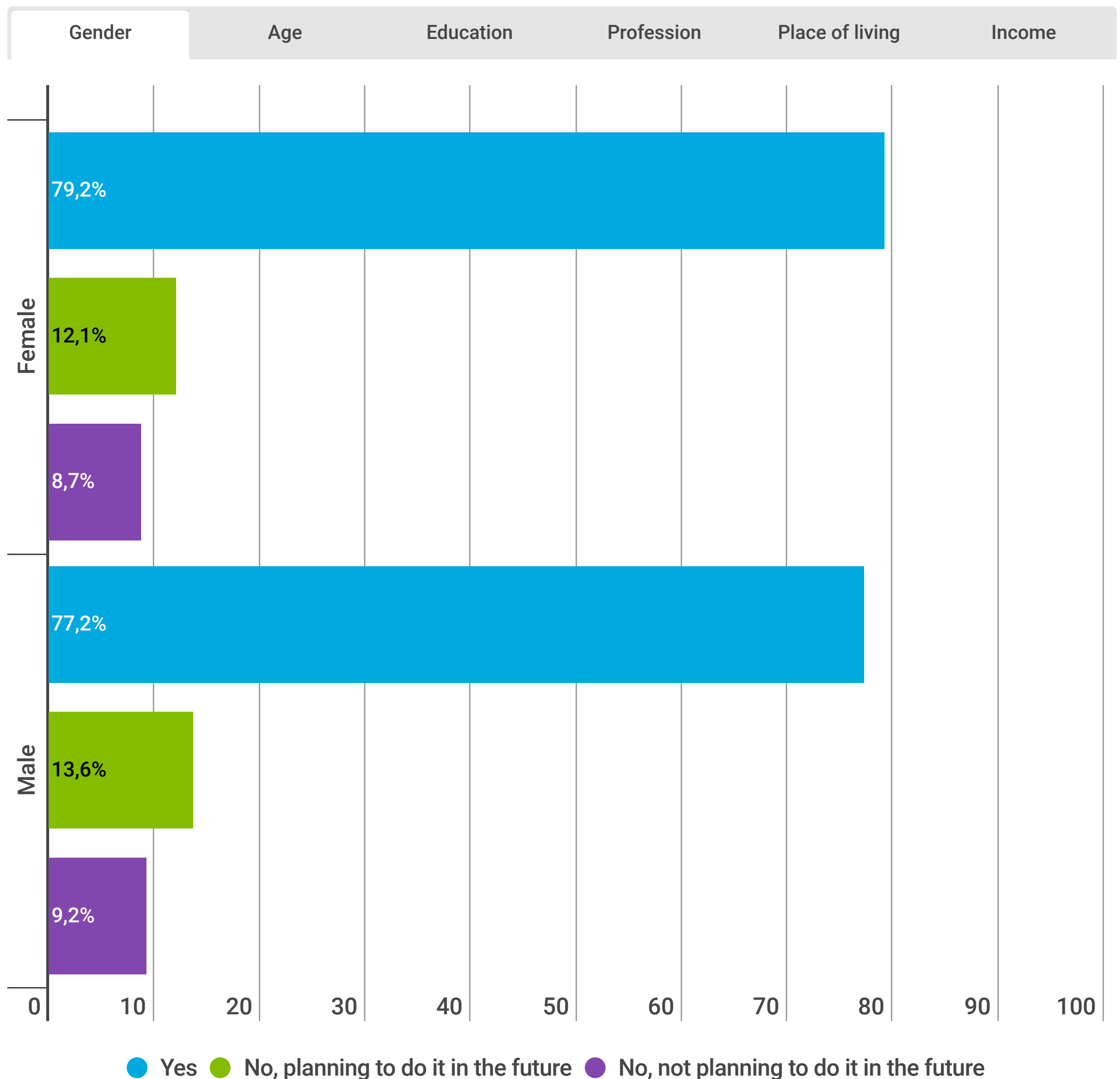
”

Before the start of the Covid-19 pandemic, males were 6 percentage points more likely to shop online than women. Most people who shop online are 25 - 44 years old, but young people (14-24 y.o.) most likely would like to try online shopping in the future. Almost all respondents who are top/middle level managers (96%) and office employees (94%) have made online purchases.

Source: gemiusAdHoc research, February 2020

N=1691

## During Covid-19: Have you made any purchase online?



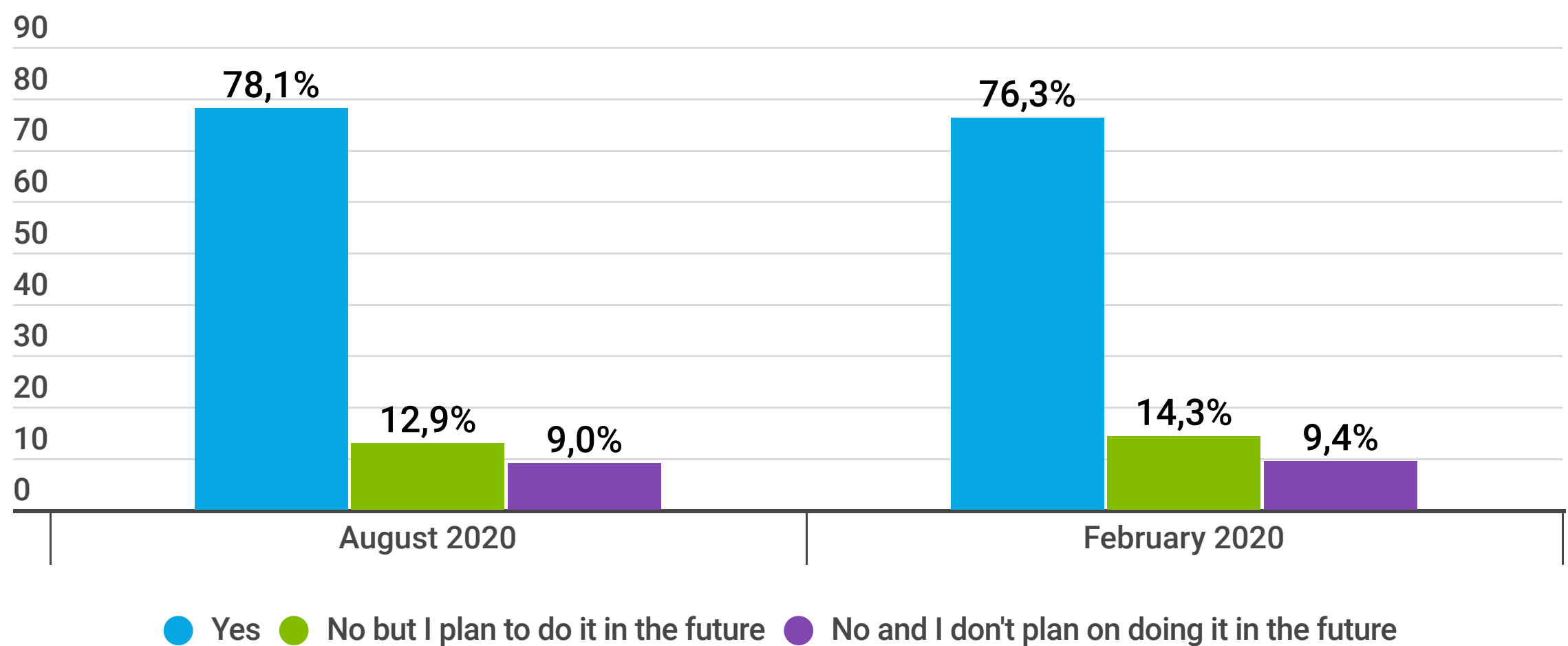
”

After the start of the Covid-19 pandemic, females tend to buy online a bit more than males (2 percentage points). Most people who shop online are 25 - 44 years old, but young people (14-24 y.o.) and after the start of the Covid-19 pandemic, also seniors (55 - 74 y.o.) most likely would like to try online shopping. Almost all respondents who are top/middle level managers (97%) and technical workers (96%) have made online purchases. The same is true for respondents with higher education (95%)

Source: gemiusAdHoc research, August 2020

N= 1056

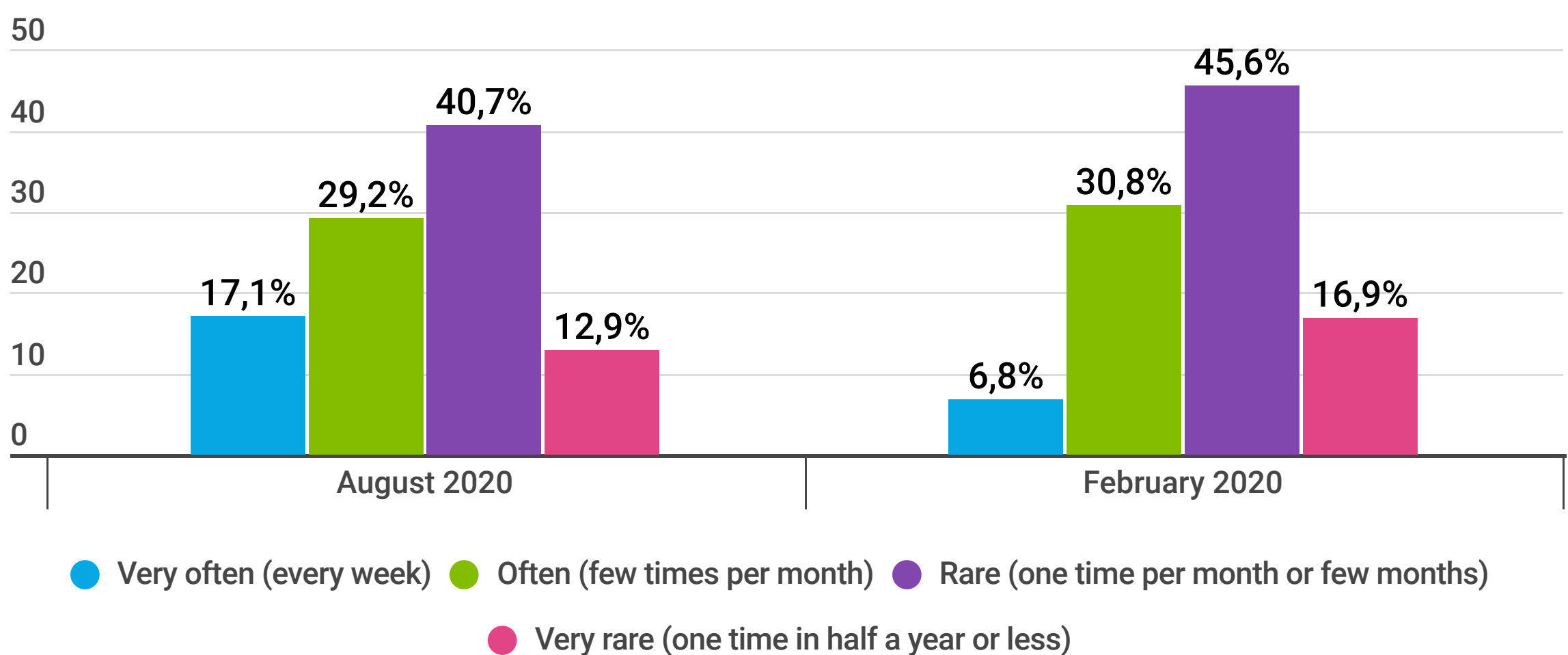
## Have you made a purchase online?



”

The number of internet users who have made purchases online has grown for 2 percentage points after the start of the Covid-19 pandemic.

## How often you buy something online?

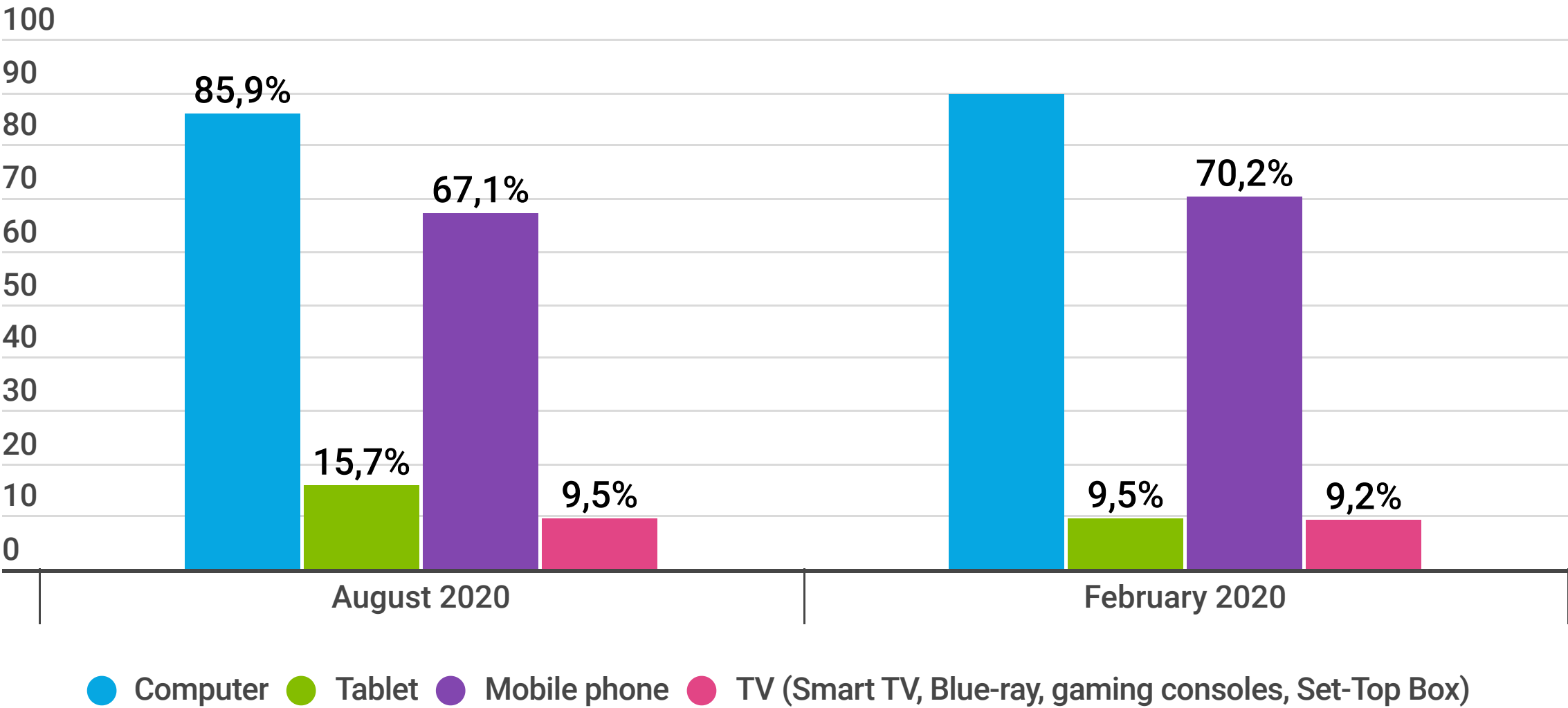


”

There is visible significant growth also in the frequency of online shopping. More than 10 percentage point more internet users are now shopping online very often.



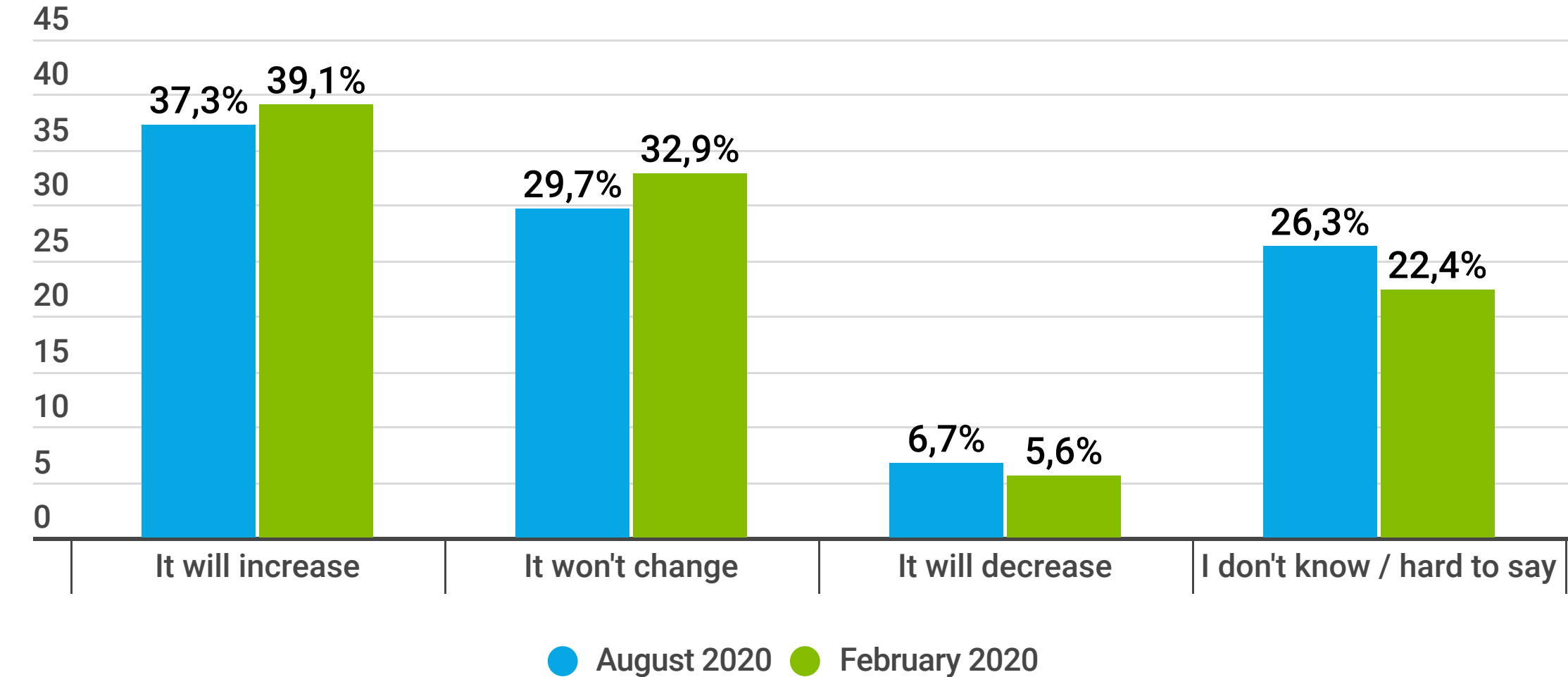
# What devices have you used to shop online?



”

Covid-19 pandemic has made respondents use their tablets more.

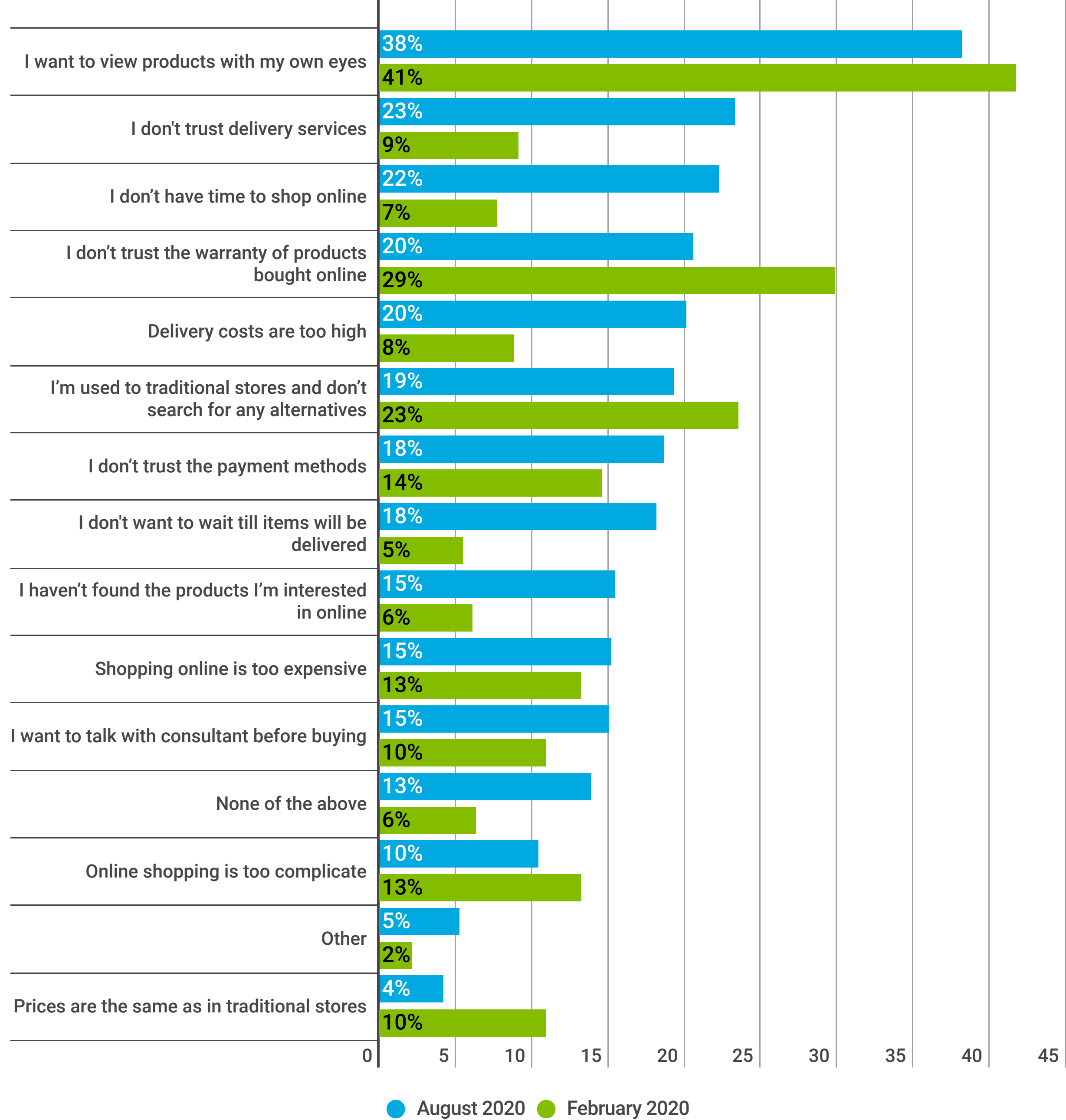
# How do you think your online spending will change in the next year?



”

Fewer people think that their online spending will increase in the following year (almost -2 percent points).

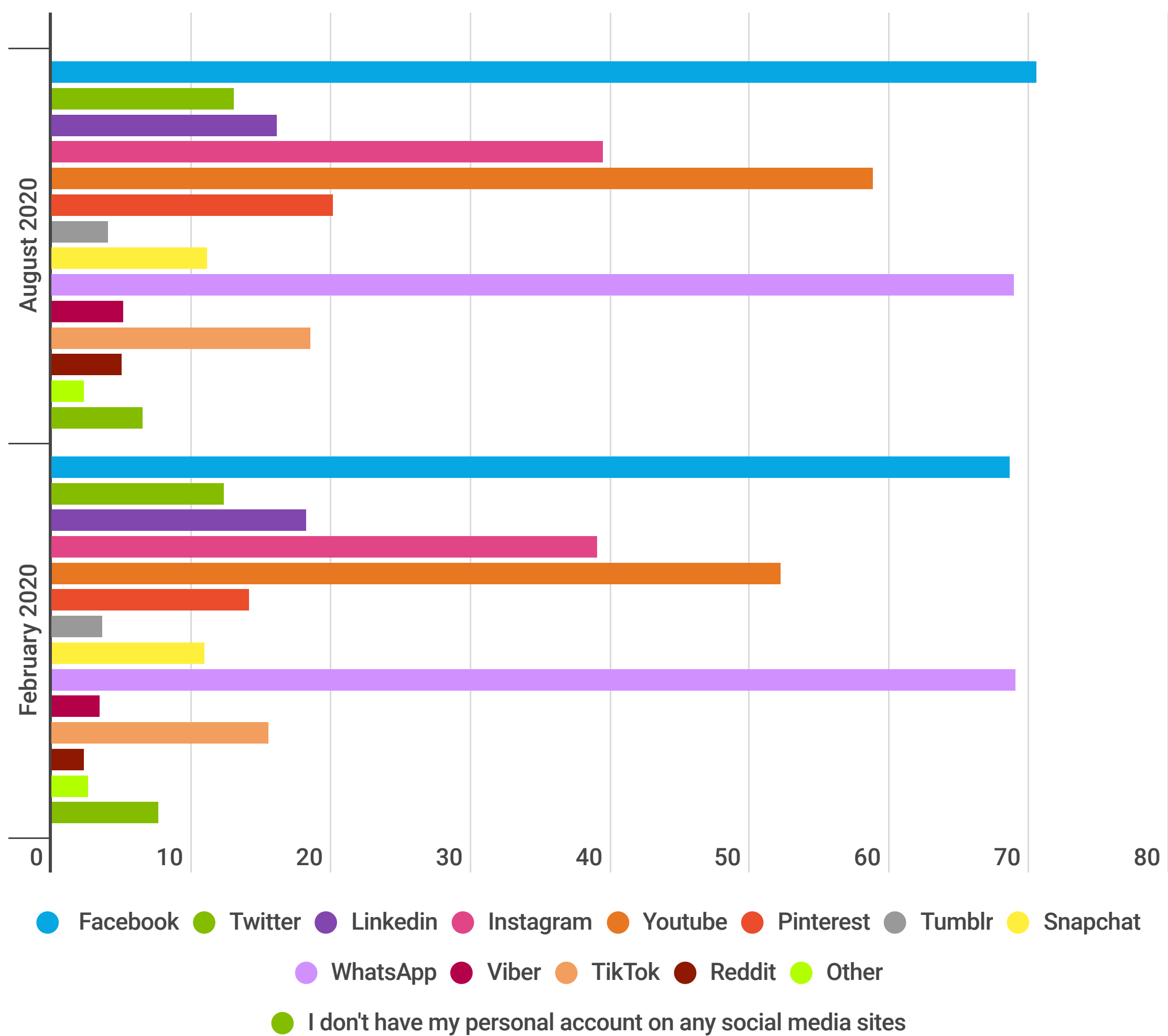
# What are the reasons you have not made any purchases online?



”

During Covid-19 there is a significant growth to reasons connected with delivery - high delivery costs (+11 percent points), don't trust in delivery services (+14 percent points), and don't want to wait a long time for delivery (+12 pp)

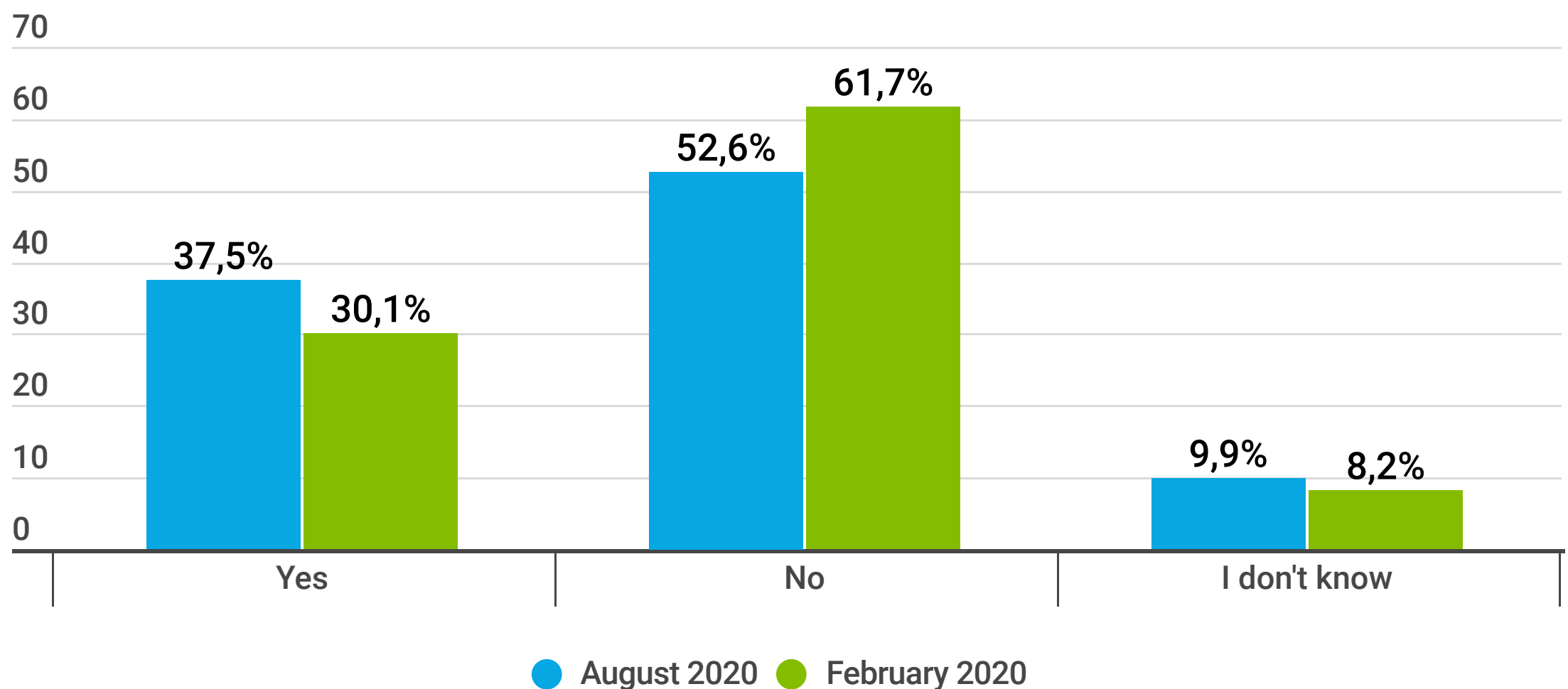
# On which social media sites you are an active user?



”

After covid-19 pandemic, internet users are more active in their Youtube (+6.6 percent points), Pinterest (+6 percent points) and TikTok (+2.9 percent points) accounts.

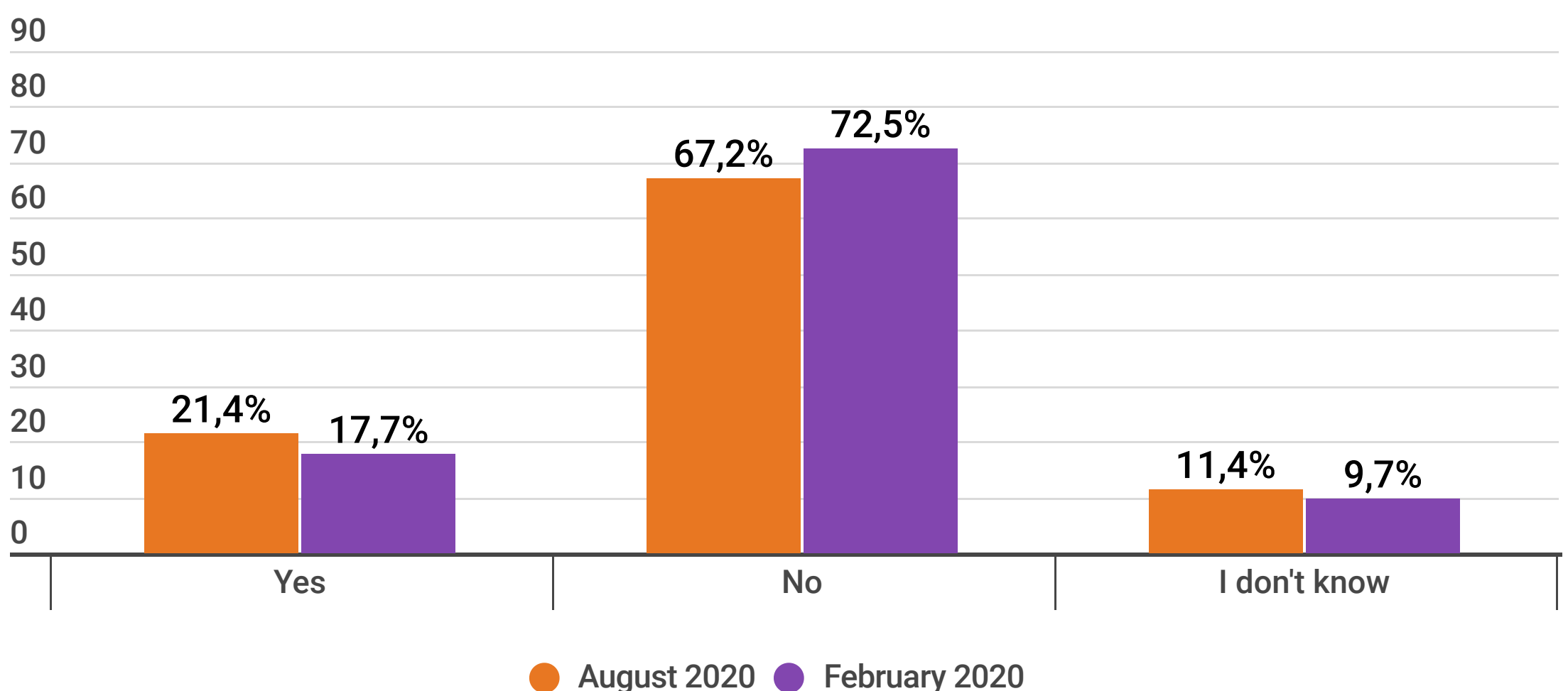
## Are you following Romanian influencers' accounts on social media sites?



”

More people have started to follow influencers on social media (+7 percent points) and also more internet users claim that they have bought things because of influencer recommendations (+ 4 percent points)

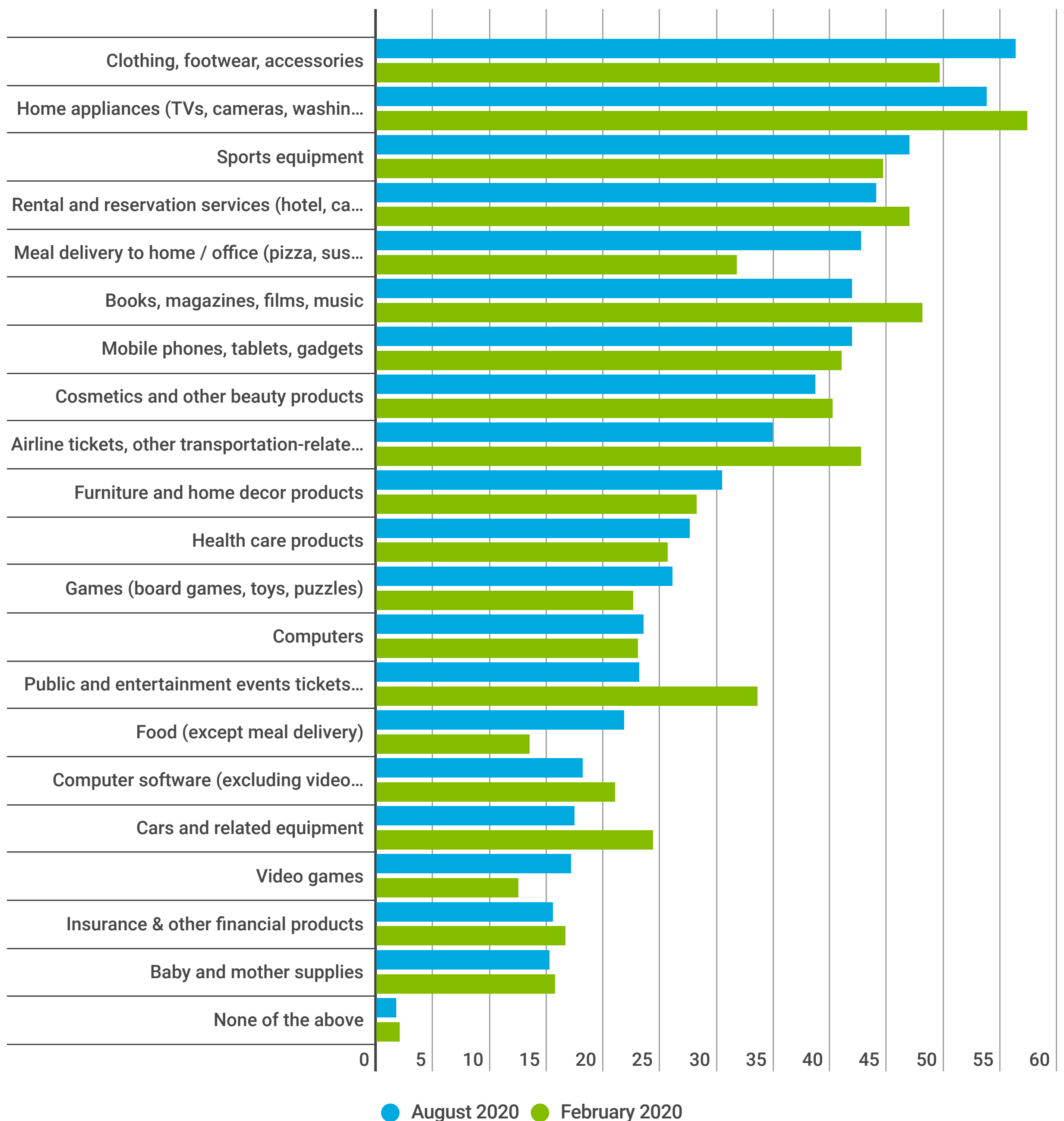
## Have you ever bought a product / ordered a service because it was recommended by an influencer?



\*Influencer - is the person who forms opinions on certain products, brands or events



## Products and services purchased from Romanian e-commerce sites/ respondents would like to purchase:

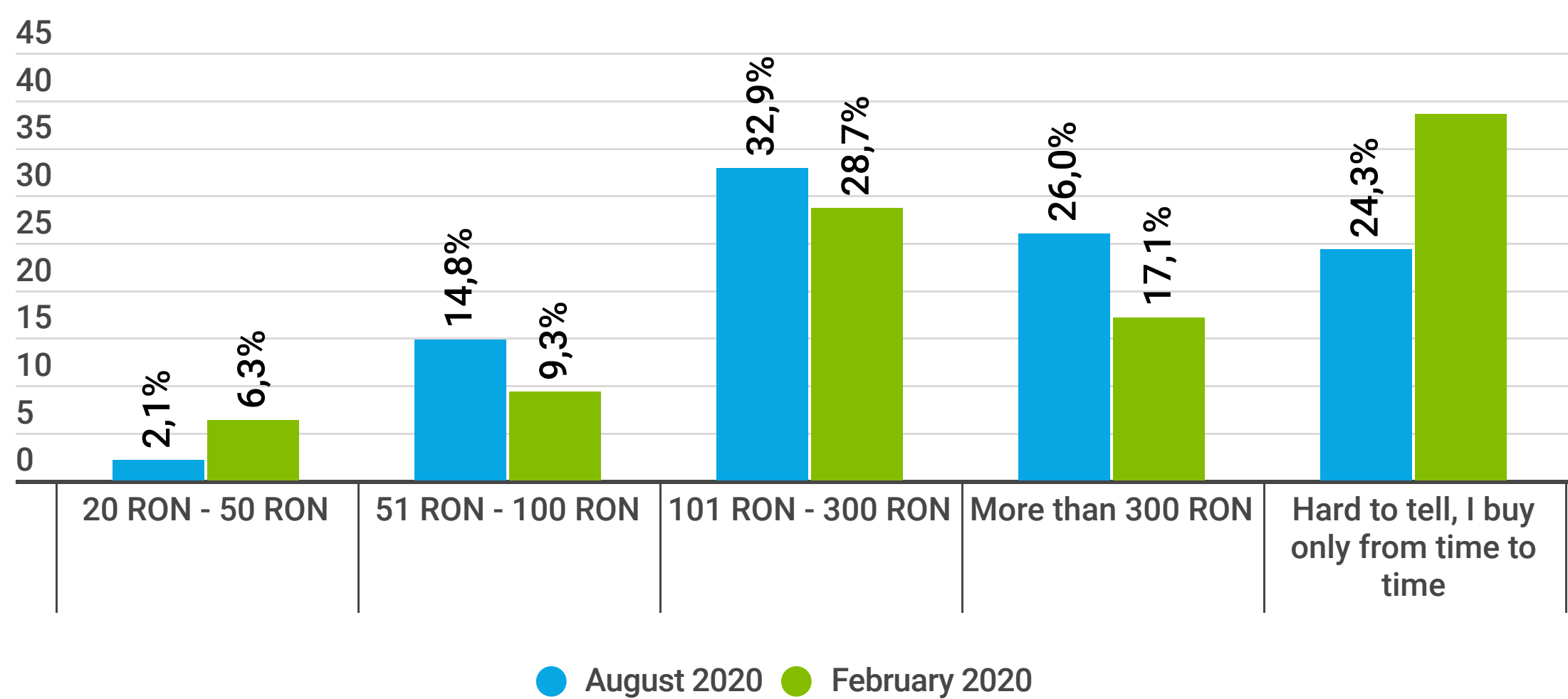


”

**During Covid-19 pandemic, the biggest growth is visible in food delivery to home/office segment (+ 11 percent points), but the biggest drop for movie/theater / concert tickets (-10.6 percent points).**

Source: gemiusAdHoc research, August / February 2020

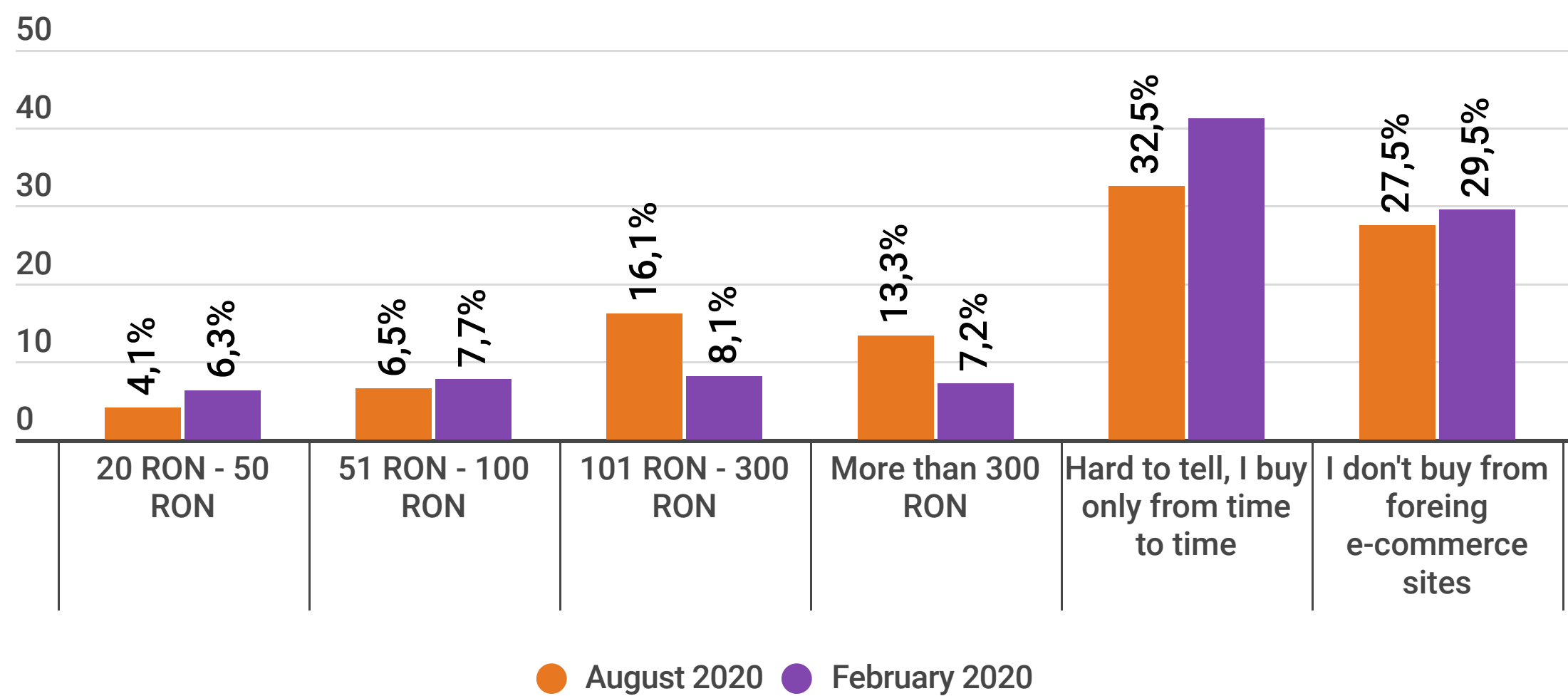
# How much do you spend on online shopping in Romanian e-commerce sites per month?



”

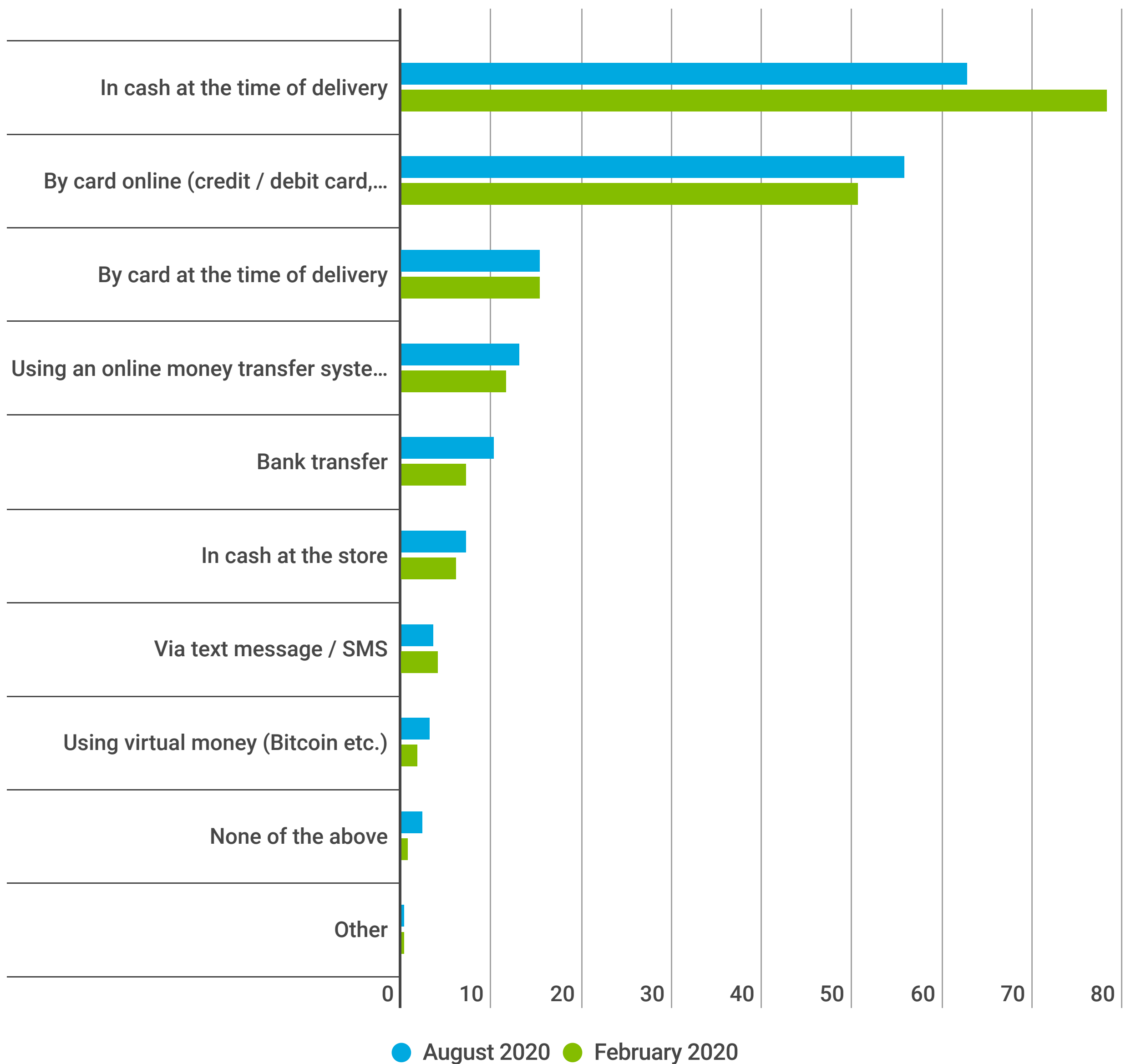
There has been an increase in spending on Romanian online shops. More people claim that they have spent more than 300 RON (+9 percent points).

# How much do you spend on online shopping in foreign e-commerce sites per month?



Source: gemiusAdHoc research, August / February 2020

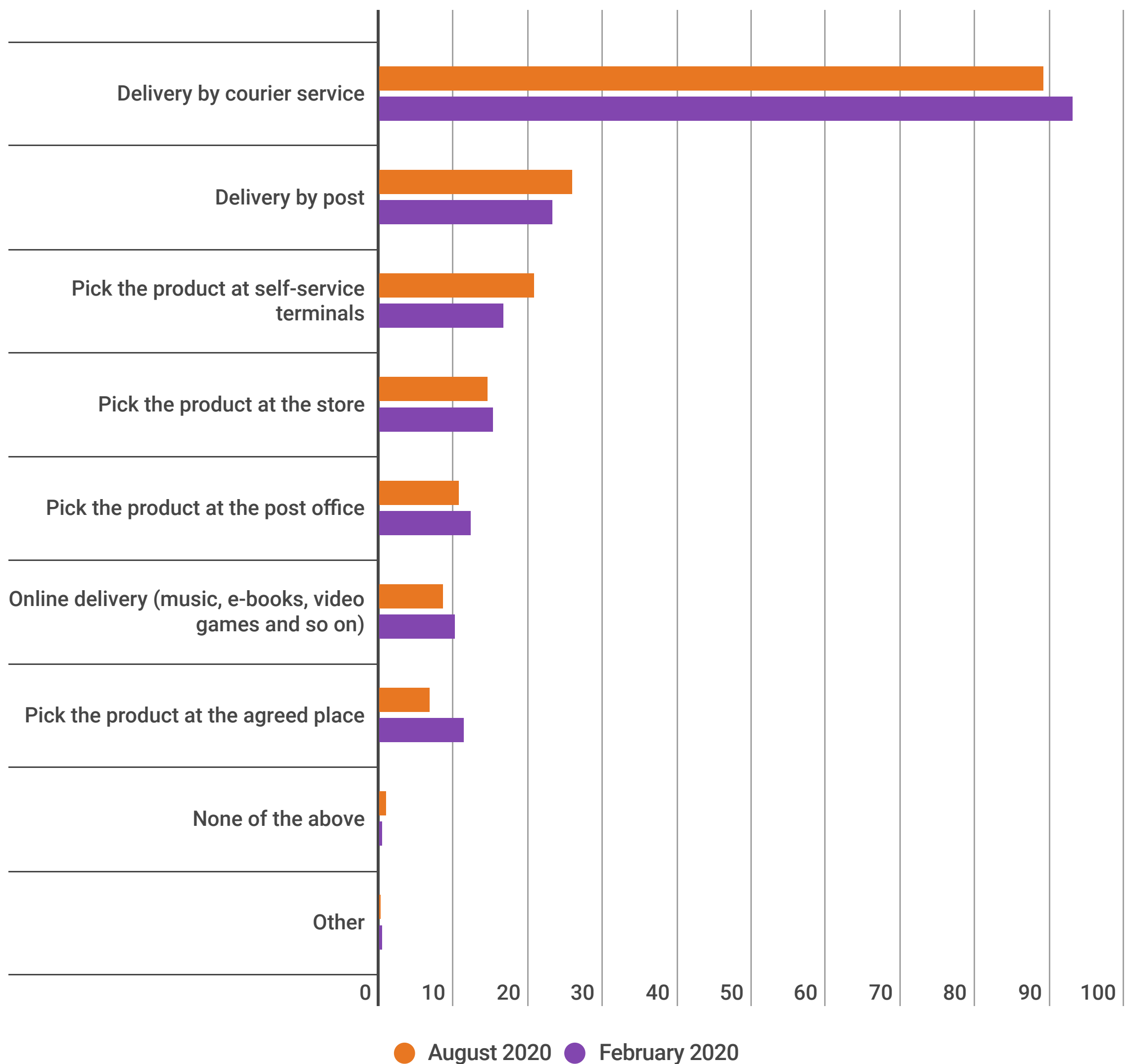
## Which of the mentioned payment options you would prefer to use to make purchases online?



”

Since the Covid-19 pandemic, there has been a significant drop of respondents who feel comfortable to pay for goods by cash to the delivery man (-15.5 percent points), while there is slight growth for payments by card online (+5 percent points) and bank transfers (+3 percent points).

## Which of the mentioned delivery options you would prefer to use to make purchases online?



Since the Covid-19 pandemic, there has been a visible drop of respondents who feel comfortable by receiving their good delivered by courier service (-4 percent points) and picking the good up at agreed place (-4.5 percent points), at the same time, self-service terminals have become more popular (+4.2 percent points).





**Gemius Romania**

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**[contact@gemius.ro](mailto:contact@gemius.ro)**