E-shopper barometer 2019
ROMANIA report

Parcel delivery network of *GeoPost*

Executive Summary (1/2)

1. E-commerce – a time, energy and money saver

- In Romania, e-commerce is above all **convenient,** as it is **seen as a time and energy saver**.
- On top of that, e-shopping is also a way of **accessing good deals**, therefore **saving money** is the other key driver of all Romanian e-shoppers.

2. Romanian e-commerce is driven by mature regular e-shoppers

- As all across Europe, Romania's e-commerce is strongly driven by a significant group of **mature regular e-shoppers**. Indeed, **47% of Romanian e-shoppers** purchase online on a monthly basis and almost half of them have been **shopping online for more than 5 years**.
- Nevertheless, still some room for Romanian e-commerce to grow – for now only 11.9% of Romanian regular e-shoppers' purchases are made online vs 13.5% in Europe.
- The **experience of e-shopping is positive** for regular e-shoppers in Romania (for **80%** of them their last purchase experience was easy).

3. The delivery – a positive experience

- The delivery is a major step of the online purchase experience, the moment when the digital experience becomes tangible.
- According to Romanian e-shoppers, irrespective of their profile, the **delivery** process is a **positive** one. Thus, for 81% of regular e-shoppers, the delivery process was easy, as easy as the overall purchase process itself (80%).
- The return process is felt to be more of a pain point, with still room for improvement – only **55%** of regular e-shoppers claim that the **return** of their order was **easy,** slightly below the European average (60%).
- Most e-shoppers use **more than one delivery place,** with a **strong predominance of home deliveries,** followed by post offices and deliveries at work.
- Romanian regular e-shoppers' major expectations in terms of delivery is around **visibility** (advanced notifications, real time info) and **precision** (knowing the delivery slot in advance).

Executive Summary (2/2)

4. Different profiles of e-shoppers, different expectations

- The behavior of e-shoppers, as well as their major expectations towards e-shopping, are specific to the various e-buyers profiles.
- The Romanian **aficionados** praise the **convenience** of e-shopping and consider that they could buy almost all products they need on the internet. Indeed, they purchase a lot of types of products, but they still do not include frequently **groceries** and **fresh food** in their e-shopping basket. They are overall happy with the delivery process, but there is still room for improvement in terms of returns, which only less than a half find easy. They mainly expect to know the **name of the carrier**, but also **precision** (knowing or selecting the delivery slot), and **visibility** (real time info, advanced notifications).
- The **epicureans** are slightly more recent online buyers, very active, who look for ways to facilitate their lives and online shopping could be a means of achieving that. They buy **less frequently** and **more selectively** than Aficionados. They are very **happy** with the **delivery** experience overall. **Knowing the name of the carrier** is a must for them, mainly to be reassured. Also, delivery time matters – a delivery that is perceived as too long prevents them from purchasing on a specific website.
- For now, the eco-selective profile is much less present in Romania, a similar case to Baltic countries and to all Eastern and Central European countries, except Poland.

5. The opportunity of a greener e-commerce

- Even if the eco-selective profile is not very present in Romania for now, regular e-shoppers appear to have a certain sensitivity to green topics. As European regular buyers, Romanian ones expect environmental responsibility from brands and companies (78%), **but their personal commitment is for now less strong.**
- Also, the Romanian epicurean e-shoppers show a strong interest in environmental topics. Thus, **85%** of **epicureans** claim to **buy environmentally friendly products** when possible. Furthermore, **93%** of them think that **companies need to be environmentally** responsible.
- As e-commerce stands for an opportunity to access good deals, and more specifically for epicureans, e-commerce answers their need for life facilitators and time savers. Therefore, there is a clear opportunity to reassure these e-shoppers by making e-commerce greener, so that they can increasingly take advantage of the benefits that they already perceive with regards to e-commerce.

Methodology

Sample

18+ y.o. European e-shoppers that have ordered physical goods online since January and then, received a parcel. Identified within a sample representative on the national population on 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.

Fieldwork dates

Conducted from May 27th to July 10th, 2019

Data collection

- Online data collection (blind: interviewees do not know who requested the study)

- 23,255 interviews across 21 European countries

- Number of interviews achieved per country:

□	Austria: 1,000	□	Ireland: 1,104	□	Slovakia: 1,001
□	Belgium: 1,000	□	Italy: 1,501	□	Slovenia: 801
□	Croatia: 800	□	Latvia: 800	□	Spain: 1,501
□	Czech Republic: 1,101	□	Romania: 800	□	Switzerland: 1,000
□	Estonia: 800	□	Netherlands: 1,008	□	UK: 1,502
□	France: 1,515	□	Poland: 1,501		
□	Germany: 1,509	□	Portugal: 1,000		
□	Hungary: 1,010	□	Romania: 1,001		

Regular e-shoppers

1

E-commerce in Romania is very concentrated around regular shoppers.

Regular Online Shopper definition

The **regular online shoppers** are e-shoppers :
- aged 18 to 70 years old
- who buy online at least one category every month

They represent **47%** of the Romanian e-shopper population

90%
of all Romania online purchases are made by regular e-shoppers.

European average

85%

Annual number of purchases (median) made by regular e-shoppers

Portugal	Estonia	Slovenia	Croatia	Slovakia	France	Belgium	Latvia	Romania	Switzerland	Germany	Spain	Czech Republic	Lithuania	Hungary	Italy	Austria	Ireland	Netherlands	Poland	UK	European mean
30	30	33	34	34	35	35	35	35	36	36	36	36	36	36	37	39	43	44	46	48	40
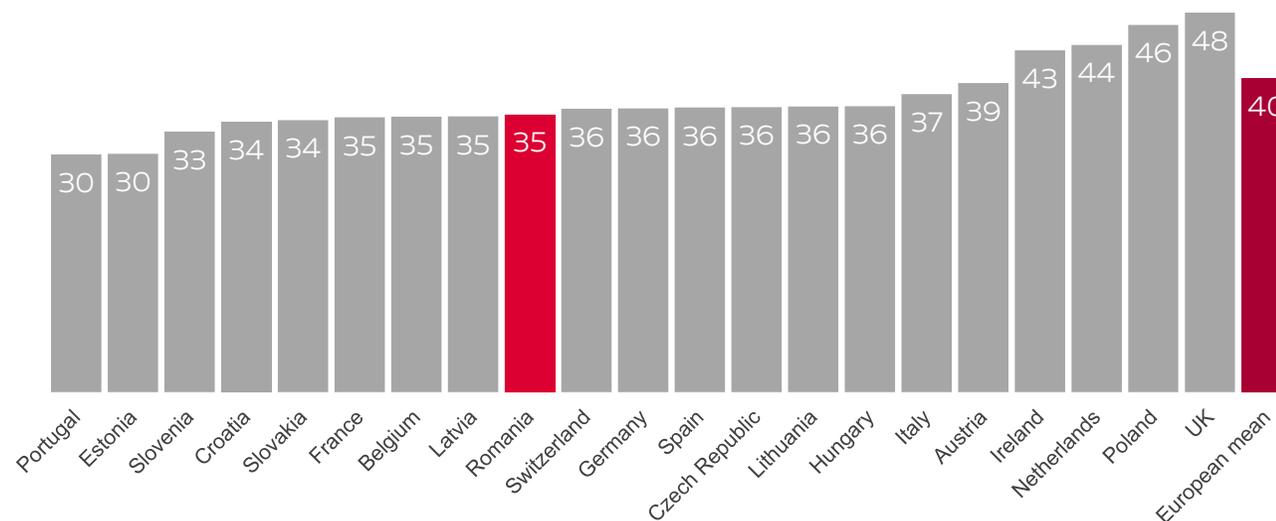
Regular e-shoppers' attitudes at a glance

86%
(% agree & strongly agree)

of regular shoppers think **shopping online saves time**

European average **80%**

69%
(% agree & strongly agree)

of regular shoppers think **shopping online saves money**

European average **66%**

73%
(% agree & strongly agree)

of regular shoppers think **shopping online strongly reduces the stress of buying in stores**

European average **67%**

78%
(% agree & strongly agree)

of regular e-shoppers consider that **brands and companies have to be environmentally responsible these days**

European average **70%**

BUT only…

67% make sure to **buy environmentally friendly products** when possible

European average **50%**

53% are willing to **pay a premium** for products/services respectful of the environment

European average **43%**

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Regular e-shoppers – online retail at a glance

46%

of regular e-shoppers have been **shopping online for more than 5 years**

European average **62%**

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

@11.9%

European average **13,5%**

Top 3 types of goods purchased online since January-%
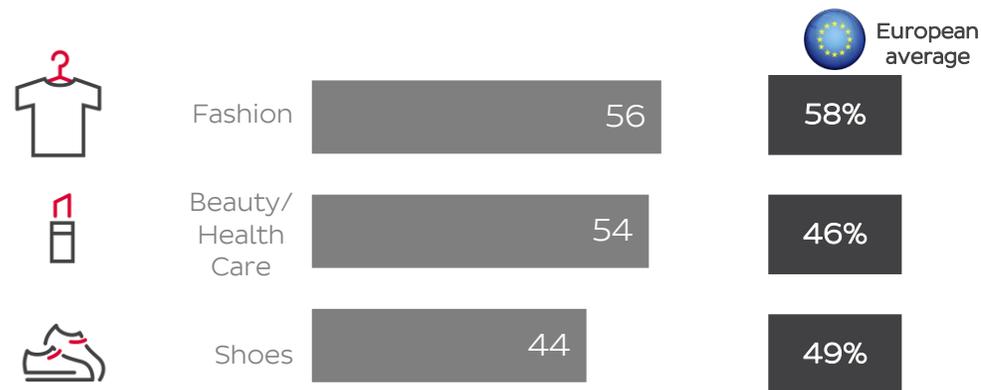
European average

		European average
Fashion	56	58%
Beauty/Health Care	54	46%
Shoes	44	49%

63% of Romanian regular e-shoppers have already bought online from foreign websites

European average **62%**

71% Europe **67%**
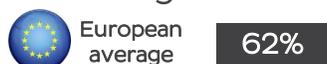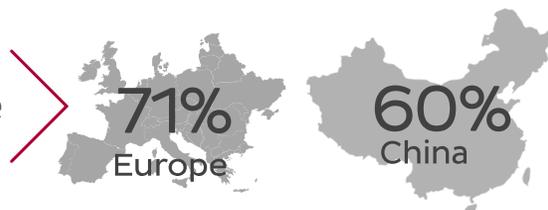
60% China **60%**

80%

of e-shoppers consider that making **their last online purchase was easy**

European average **78%**

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Regular e-shoppers' habits at a glance

78% of regular e-shoppers use a **smartphone**

European average **64%**

14% are subscribed to an online retailer's **loyalty scheme**

31%

82% choose the website based on **social media and influencers**

60%

7% of regular e-shoppers **returned** their last order

European average **9%**

55% consider that **returning the item(s)** they bought online **was easy**

60%

83% shared or published **feedback** after purchasing

70%

Delivery preferences at a glance

Usual delivery places

90%
At home

27%
To a post office

22%
At work

12%
To a central collection depot

European average: 86% | 17% | 13% | 4%

81% of regular e-shoppers consider that the **delivery** of their latest online purchase **was easy**

European average: 82%

High interest for certain options– a means to tailor delivery
(Importance index – average interest=100)

158	153	150	139	122	121	120

European average: 117 | 120 | 155 | 134 | 141 | 79 | 127

- Advanced notifications (within a one-hour window)
- Know the exact one-hour window of the delivery
- Real time info on delivery
- Select day and one-hour window delivery in advance
- Several delivery options
- Delivery where I am located
- Possibility to reschedule delivery

E-shoppers segmentation

2

Segmentation of e-shoppers

Development of a local / international segmentation

-> We started with multi-local segmentations and built a European segmentation from the local ones

-> This gives an overall view, and, at the same time, reflects local specificities

1

Development of multi-local segmentations on each group of countries

2

Development of a European segmentation using the local segmentations

3

The European segmentation obtained is applied at country level

Group of countries :

- UK
- Latvia, Estonia, Romania
- France, Belgium, Germany, Netherlands, Austria, Switzerland, Poland, Ireland
- Italy, Croatia, Slovenia, Spain, Portugal
- Hungary, Slovakia, Czech Republic, Romania

✓ To develop the European segmentation, countries have been weighted based on the e-commerce penetration in each country.

Segmentation of e-shoppers

The set of variables used to build the segmentation

Active variables used to build the multi-local segmentations

A1. Online purchase frequency per item

A2. Number of parcels received (last month)

B1. Drivers of online purchases (Only the most segmenting items)

B2. Barriers of online purchases

C2. Websites loyalty

C6. Cross-border purchases online

G11. Shopping Attitudes

Methodological note

Differences between the segments and the average e-shoppers are shown as follows (at 95% confidence rate) :

/ for **less than 5 pts** of rate differences <u>or</u> **less than 0,3 pt** for numerical average

/ for **5 to 10 pts** of rate differences <u>or</u> between **0,3 and 0,5 pt** for numerical average

/ for **11 to 20 pts** of rate differences <u>or</u> between **0,6 pt and 1 pt** for numerical average

****/**** for **more than 20 pts** of rate differences <u>or</u> **more than 1 pt** for numerical average

No star if no significant difference

positive/negative

Focus on specific e-shoppers

<table>
<tr>
<td>

The e-shopping **aficionados**

</td>
<td>

The **epicurean** e-buyers

</td>
</tr>
</table>

Their weight among Romanian e-shoppers:

14%

N=144 respondents

European average

13%

34%

N=339 respondents

European average

15%

2.1. The aficionados

2.1.1. <u>Who</u> are the aficionados?

2.2.2. What are aficionados' <u>main habits</u> when

buying online?

- Experienced & fervent e-shoppers

- With a digital & connected behaviour

- Favouring cross-border purchases

- Expecting flexibility for the delivery/return services

The e-shopping aficionados

- Romanian Aficionados are young e-shoppers, mostly female, with higher income, but less experienced than their European peers (less seniority in terms of e-shopping). They are **frequent online buyers**, purchasing all types of goods online. They appreciate above all the **time and energy saving benefit** of e-shopping.

- Very connected to **social media**, they **follow a lot brands on these networks**. As a result, their purchases are **mainly driven by recommendations** on social media, but also advertising (both on social media and, more generally speaking, online), much more than in other European countries.

- It is quite important for them to **know the delivery company** for reassurance mainly. If the delivery process is very easy, aficionados are more demanding regarding returns – more than half of Romanian aficionados find the return process difficult.

- **Precision** (selecting or at least knowing the delivery slot) and **visibility** (real time info and advanced notifications) are, by far, the **most important options sought** by E-shopping aficionados.

Who are the aficionados?

2.1.1

Who are the e-shopping aficionados?

- A highly predominantly **female** profile

- **Urban, younger** active people (30-39 y.o) with **upper income**

			European average
FEMALE	77%	****	65%
AGE	41,0 y.o	****	40,9 y.o

Age distribution:
- 18-29: 19
- 30-39: 35 ***
- 40-49: 13
- 50 +: 33 ***

INCOME | | | European average
UPPER	49%	***	47%

MARITAL STATUS

SINGLE	14%	22%
MARRIED	67%	49%
COHABITATION	5%	20%
DIVORCED	8%	6%

CITY SIZE

Urban	91%	87%
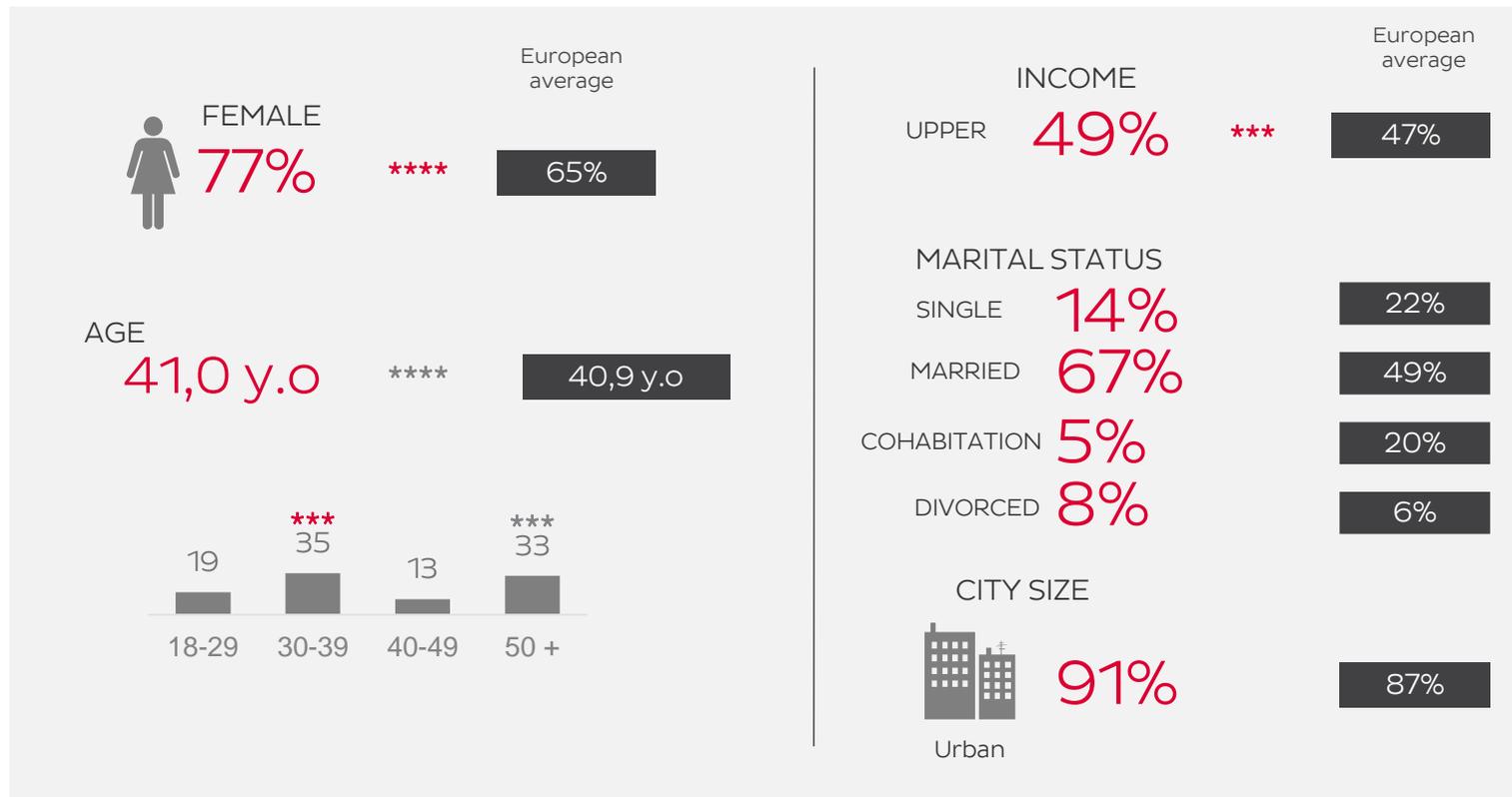
What are the Aficionados' main attitudes ?

They are…

…Tech Savvy

41%
"I am always looking for **novelty and fun** even in everyday products"
47%

59%
"My **mobile** is quickly becoming my main shopping tool"
54%

…Connected

75%
"I actively look for **reviews** and ask for **recommendations** online before making a purchase"
67%

…Bargain hunters

71%
"I look forward to **big discount** events, online or offline, (Black Friday, seasonal sales…)"
62%

58%
"The most important thing about a brand is that it gives **good value for the money**"
55%

…Passioned about e-shopping

59% **
"I can shop for **nearly 100%** of the products/services I need online"
62%

41%
"Traditional retail stores are less important in my shopping than a few years ago"
58%

26%
"Relative to other people, I have more **passion** about e-shopping"
33%

38%
"My friends and family really rely on and **trust my advice** about new ways of shopping or new shopping experiences"
33%

G11. Here are some statements about shopping. To what extent do you personally agree or disagree with the following statements?
G11bis. And now, here are some statements about life in general. To what extent do you personally agree or disagree with the following statements?
G10. Now please think about the way you shop ….Using the scale provided, please indicate how much you disagree or agree with each of the following statements

% Top2Box (Strongly and somewhat agree)

E-shopping is mostly perceived as a time and stress saver by Romanian Aficionados.

Aficionados' image of e-shopping

91% ** *"Shopping online saves time"* - %T2B

87%

70% *"Shopping online saves money"* - %T2B

73%

77% ** *"Shopping online strongly reduces the stress of buying in stores"* - %T2B

76%

66% *"Shopping online is so convenient that I use it more and more, even if I must return my purchases sometimes"* - %T2B

73%

41% *"Traditional retail stores are less important in my shopping than a few years ago"*

58%

European average xx%

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What are aficionados' main habits when buying online?

- Experienced & fervent e-shoppers

- With a digital & connected behaviour

- Favouring cross-border purchases

- Expecting flexibility for the delivery/return services

2.1.2

They are rather new e-shoppers as only half of them have been buying online for more than 5 years. They receive more parcels than the average e-shopper on a monthly basis.

14% of e-shoppers who make **30%** of all online purchases

European average   `13%`

`34%`
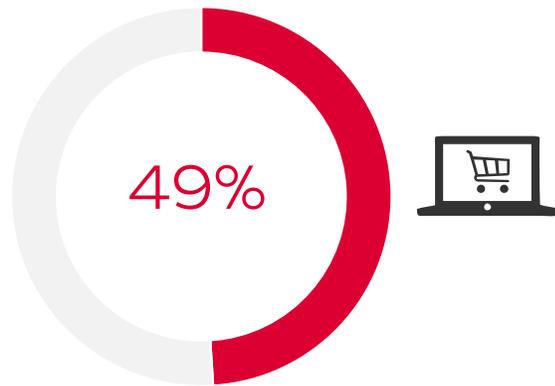
49%

have started purchasing online more than 5 years ago

`67%`

4,5 parcels In the last month ****

`8,1`

C1. When did you start shopping online
A2. And during last month, how many parcels did you receive?

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E-shopper barometer – Country report |November 2019 | 23

E-shopping aficionados purchase all types of goods online, with a high frequency. High –tech and white goods are, nevertheless, only averagely bought.

% – TOP 10 types of goods purchased online since January

European average

Category	Value		European average
Beauty/ Health Care	78	****	69%
Fashion	76	****	77%
Shoes	65	****	69%
Books	49	****	60%
Accessories and jewellery	49	****	49%
Toys	47	****	49%
Small home furniture/ Decoration	42	****	55%
White goods and home appliances	33		35%
Leisure	32	***	52%
High-tech/Electronics	31		44%

6,8 categories bought on average **** 8,5

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?
Base: Have ordered online fresh food and beverages since January (n=33)

E-shopper barometer – Country report |November 2019 |

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They are familiar with the websites they purchase from, and loyal to them, but less subscribed to loyalty schemes than their European peers.

Familiarity with the website
Last Purchase

81%

Already bought something on the website

88

Never bought something on the website before last order but **already knew it** — 12%

European average: 8

Never heard about the website before last order — 7%

European average: 3

Loyalty to websites

75% ***

Loyal to certain websites but like to change sometimes

75

Always shop on the **same websites** — 6% ** — 11

Always go on different websites to shop — 19% ** — 15

Loyalty Program subscriptions

10%

Yes subscribed to retailer loyalty program

39

No, but intend to do so in the next few months — 23% — 12

No, and do not intend to do so in the next few months — 54% — 45

I don't know / I can't remember — 13% — 5

They are satisfied with their e-shopping experience: their latest online purchase is well rated.

Rating of latest online purchase experience
%

- ■ Excellent
- ■ Very good
- ■ Good
- ■ Fair
- ■ Poor

30	46	16	6	2

76

Last online purchase experience was excellent or very good

European average **84**

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Social media are a key point of contact for brands, as Aficionados are very connected. They even feel they need to manage their online identity.

78% *"I follow or like brands on social networking sites" – %T2B*

72% European average

% – Top 5 social networks used

Facebook	YouTube	Instagram	Pinterest	LinkedIn
95	85	52 **	33 ***	21
82	72	53	29	17

3,2 on average **

3,0 European average
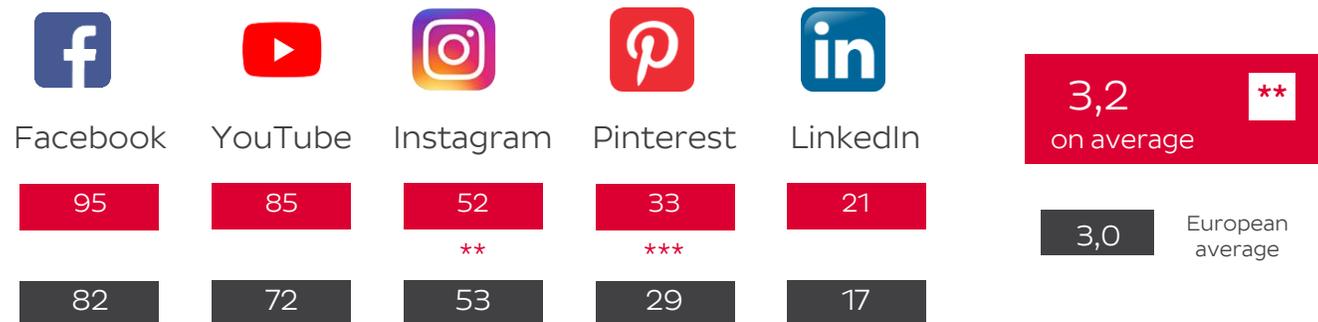
52% *"It is very important to actively manage my online identity and personal information" – %T2B*

44% European average
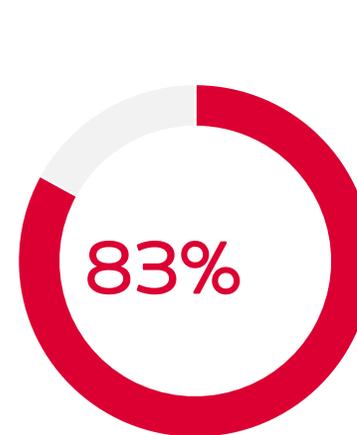
83%
Share or publish feedback after purchasing

European average 78

Post and pictures on social networks
| 10 | 12 |

Recommendations to friends/relatives/colleagues
| 62 | 44 |

Comment/rate products on the website or social networks
| 44 | 49 |

C2a – Do you use any of the following social sites at least once a week?
C19 – Do you publish or give feedback after purchasing?
Rq: Several answers allowed

E-shopper barometer – Country report |November 2019 | 27
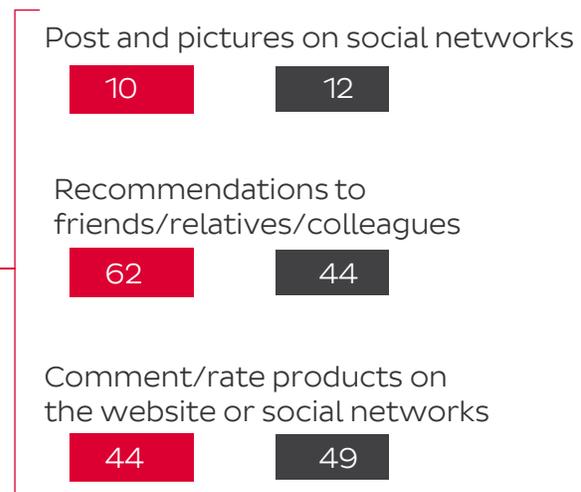
Logically, recommendation on social media is the major driver of choice of a website. Also, advertising is more impactful than in other European countries.

Drivers when choosing a website
%
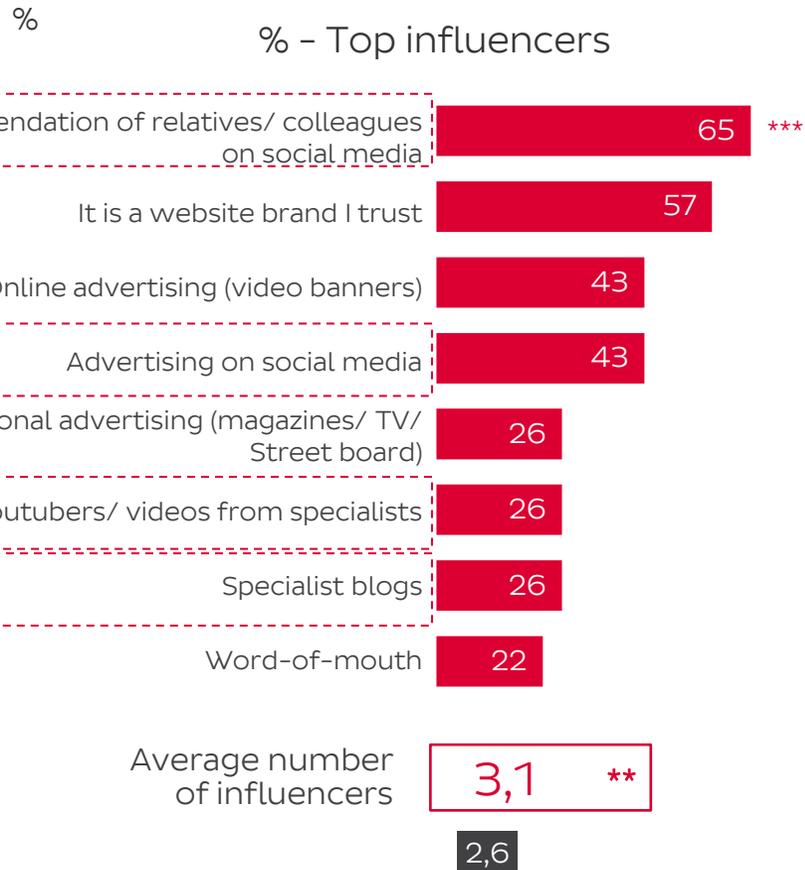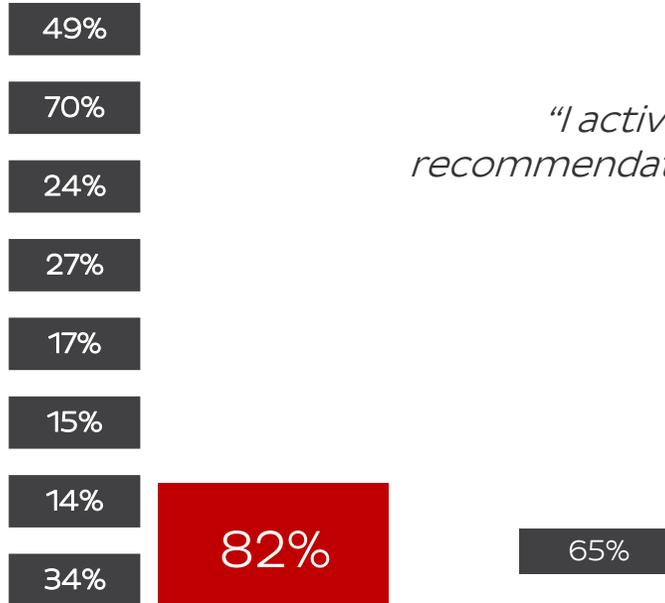
% – Top influencers

European average

Driver	Value		European average
Recommendation of relatives/ colleagues on social media	65	***	49%
It is a website brand I trust	57		70%
Online advertising (video banners)	43		24%
Advertising on social media	43		27%
Traditional advertising (magazines/ TV/ Street board)	26		17%
Youtubers/ videos from specialists	26		15%
Specialist blogs	26		14%
Word-of-mouth	22		34%

75%

"I actively look for reviews and ask for recommendations online before making a purchase" – %T2B

67% European average

82% NET Social Media and influencers   65%

Average number of influencers **3,1** **

2,6

C18 – When shopping online, how do you choose a website?
Rq: Several answers allowed

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E-shopper barometer – Country report | November 2019 | 28

A bad reputation on social media can prevent Aficionados from buying on a website.

Top 10 features that prevent the most from buying online
% – (out of 15 criteria)

Feature	Value	European average
Bad opinion of fellow shoppers on social media	43	43
Proposed item no longer in stock	36	26
Having to pay delivery fees	30	26
Not enough security checks for payment	29	29
Delivery time too long	27	27
Technical bugs on the website	23	18
Complicated return process	23	22
Having to pay in case of return	21	28
Complicated navigation on the website	15	17
Not knowing when I will get my parcel	15	16

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B2a – Among the selected criteria which one prevents you the most from buying online? And the second, the third?
Rq: Three answers allowed

As their European peers, Romanian aficionados purchase mostly on their smartphone.

Devices used to shop online
%

European average

Device	Value	European average
Smartphone	77	76%
Laptop	57	61%
Desktop	49	44%
Tablet	19	36%

Average number of devices used to order: **2,0**

2,2

App 22

Both 44

European score **48**

Internet Browser 34
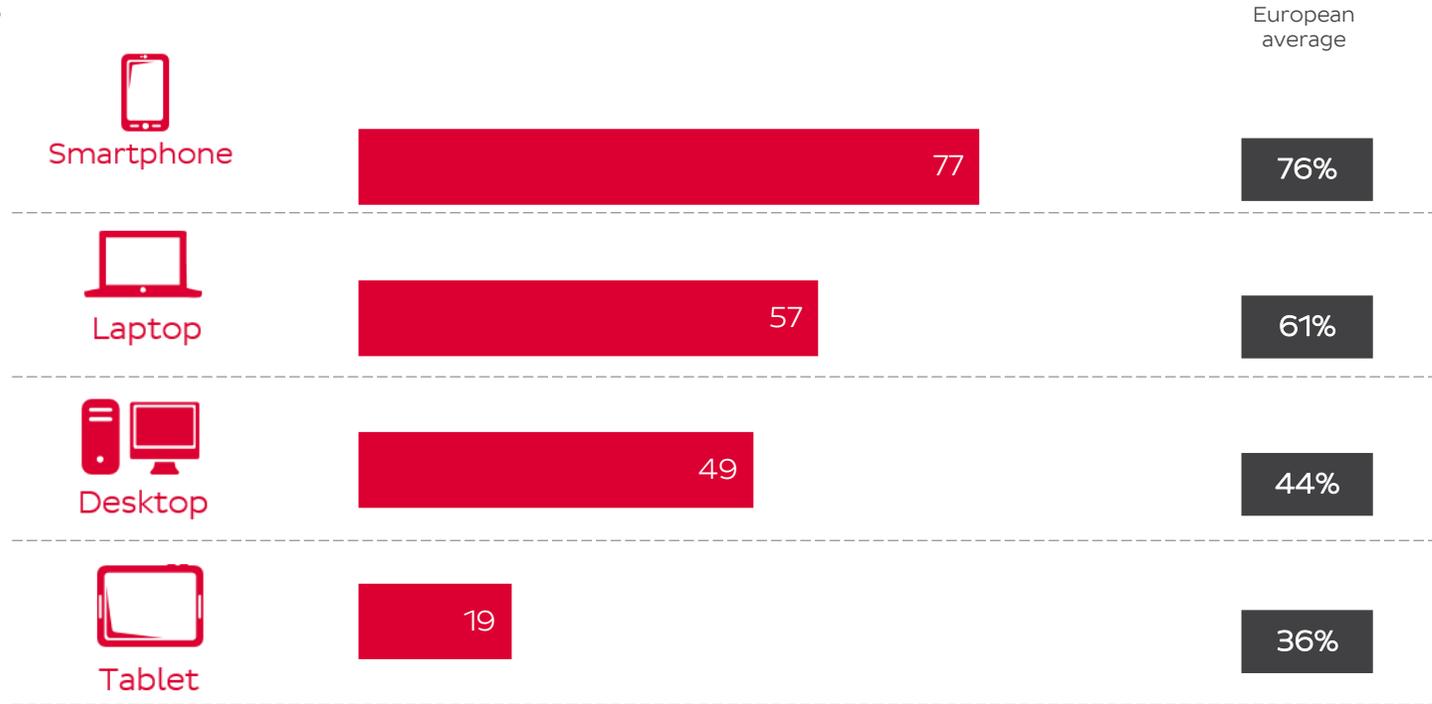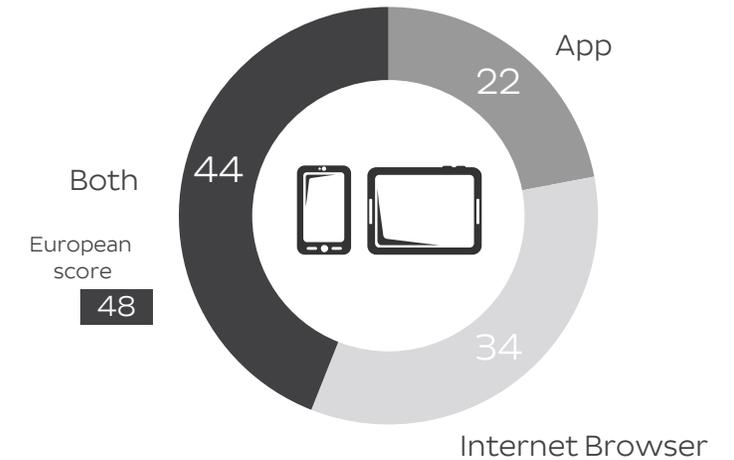
Most e-shopping aficionados prefer paying using COD. Visa/Mastercard is preferred by half of buyers.

Preferred payment methods
% – TOP10

Payment method	%	European average
Cash-on-Delivery (COD)	77 ***	17
Visa/ Mastercard	54	48
Domestic bank credit card/ debit card	37	30
Digital wallet (Paypal Alipay…)	25	57
Bank transfer	14	18
ING Home'Pay	10	1
Payu	9	7
Mobile payment app	6	4
Direct debit	4	10
PaysafeCard	4	1

62% 70%

use more than one payment method
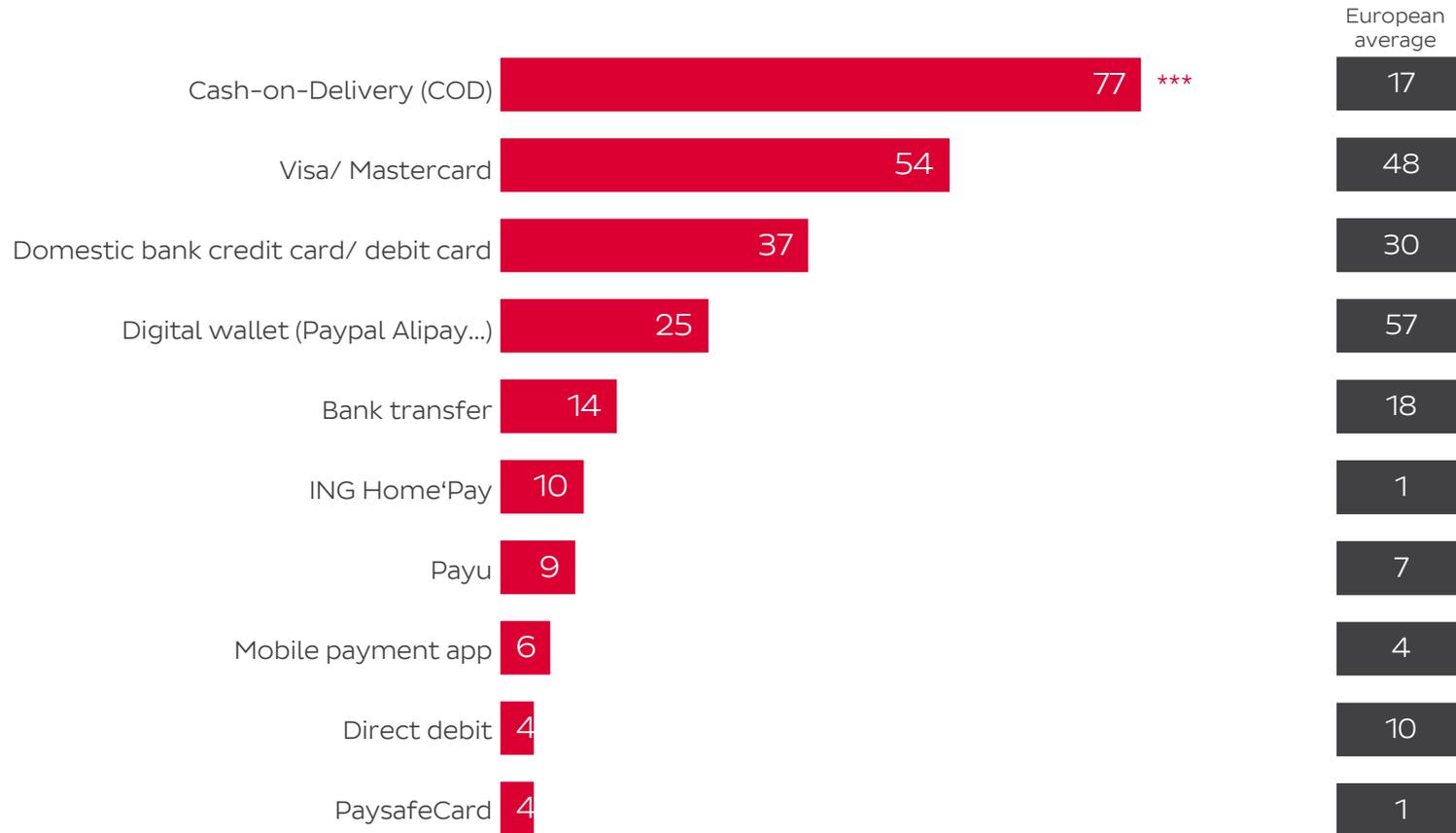
Average number of preferred payment methods:

2,5   2,6

They purchase more on foreign websites, mainly for better deals.

71% *** of Expert e-shoppers have already **bought online from foreign websites**

73

Reasons to make purchases from foreign websites

% (n=104)

European average

Better deals abroad

80 | 68

Products/ brands/ website not available locally

49 | 53

Easier and more transparent delivery/ return options

21 | 16

They speak the language

6 | 7

Other

| 3

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

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They are used to buy from several countries, mainly from China. The USA and the UK come second and third.

Top 3 most common foreign countries for buying online

European average

#1 **69%** China — 68

#2 **37%** USA — 44

#3 **36%** UK — 32

81% in other parts of the world — 83

71% in Europe — 70

17% ** from neighbouring countries — 45
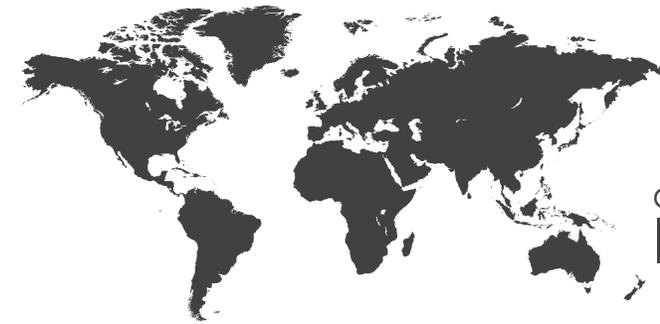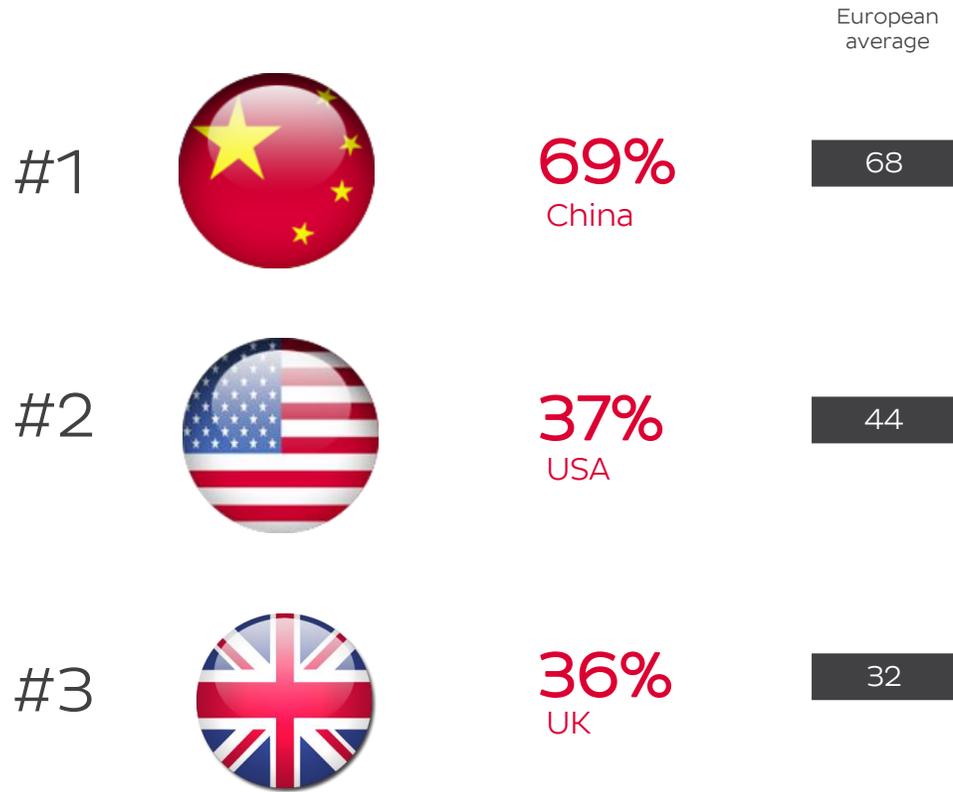
C7 – From which countries? Base: People that have already bought online from foreign websites (104)
Rq: We define a foreign website as a website having a different domain name than your local one and/or a website being in a foreign language.

Aficionados use on average 2 delivery places, mostly home and post offices. Overall delivery is an effortless process for them.

82%

... found delivery easy/effortless

European average | 85

For **62%** of the expert e-shoppers, the latest **delivery was free**

FREE | 71

92% ...were notified via email or SMS

72

Usual Delivery Place
Top 3

At home 91% | 88

To a post office 33% | 20

At work 25% | 17

2,0 * Delivery places on average

2,0

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9% returned their last purchase, but less than half of them found it effortless.

9%

7

European average

... returned their last purchase

47%

61

... Found it easy/effortless
(n=68)

Top 3 Return Methods
n=68

70% Carrier picking it up at home — 32

23% ** Carrier picking it up at workplace — 7

11% Dropping it off at the retailer's store — 13

Return Policies

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

53% Before buying — 54

22% During purchase — 26

25% At the moment or return — 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?

E-shopper barometer – Country report | November 2019 | 35

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A majority of Aficionados want to know which company delivers their goods, mostly to be reassured.

76%

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

65
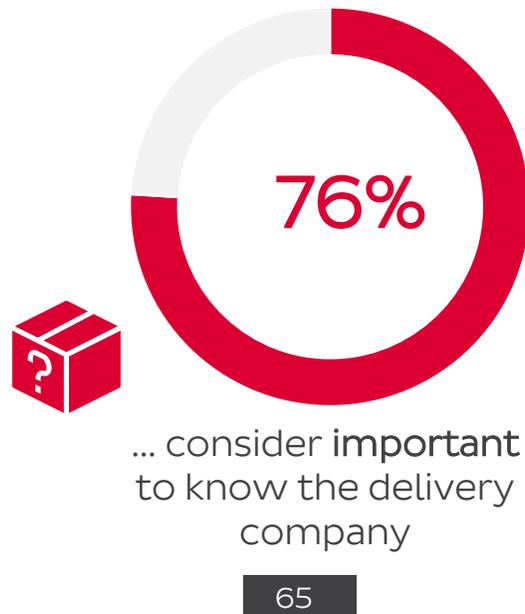
Reasons of importance to know the delivery company
% (n=111)

I think it is reassuring/comforting to know who will deliver my parcel

48

42

I would like to choose one which guarantees a good delivery service

37

35

I had bad experience(s) with a specific delivery company and try to avoid using it

30

34

I have preferences when it comes to delivery companies

26

29

A new way to show the priority of potential services

MaxDiff Methodology

Would the following delivery/ return options make you more likely to purchase from a website/ retailer?

The MaxDiff is a way to show the importance of several item relative to each other.

- **During the survey**

In the questionnaire, the respondent is shown 7 different screens one after the other. On each screen, he must choose what is the Most important and Least important items for him among 4 options.
Over the course of these 7 screen, the respondent will see each items in relation to each other.

- **Analysis**

The output of this methodology is an accurate ranking of all items. The « Least Important » option gives a negative score to the item, the « Most Important » option gives a positive score. The results are then scaled in order to have an index score with a base at 100. The 100 base can be considered as "Neither important nor unimportant".
The higher the score above 100 the more important the item is compared to the other. The lower the score is under 100, the less important the item is.

The major expectations of Aficionados are precision (knowing or selecting the delivery slot) and visibility (advanced notifications and real time info).

What delivery options are important to you when choosing an online retailer?
Importance Index – Base index: 100

Know the exact one-hour window of the delivery	168
Advanced notifications (within a one-hour window)	156
Select day and one-hour window delivery in advance	150
Real time info on delivery	149
Possibility to reschedule delivery	123
Delivery where I am located	117
Several delivery options	113
Delivery in a selectable 2-hour-window in the afternoon	96
Next day delivery	86
Delivery in a selectable 2-hour-window in the evening	81
Delivery on the same day	55
Delivery in the evening	45
Delivery on Saturday	41
Delivery on Sunday	21

100=average importance

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.
Base: 144 - 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

2.2 The epicureans

2.2.1 Who are the epicureans?

2.2.2 What are their main habits when

buying online?

- A more selective way of purchasing online

- Open to influencers

- Price sensitive

- With high expectations on delivery

The epicurean e-buyers

- The "Epicurean e-buyers" are a more masculine population, slightly more **recent e-shoppers** than Aficionados. They are more **selective** with the categories they buy online. They buy all categories averagely.

- They are also sensitive to **environmental topics**.

- Online shopping is seen as **convenient** for them as it allows to **save time** and **reduces the stress** of buying in stores. Overall they are satisfied with their last purchase experience.

- Epicurean e-buyers need to be **continuously reassured at all stages**. Highly connected to social media, they like to publish their feedbacks after purchase, but they also pay attention to recommendations from relatives and to advertising on/off line when choosing the website on which to buy. At the end, they **prefer to buy well-known brands** and **bad online buzz** is a hurdle into purchasing on a website.

- Regarding the delivery, **knowing the carrier brand name** is essential for them, in order to be reassured. Also, transit times are of importance – a too long delivery time can be a strong barrier to purchasing on a specific website.

Who are the epicureans?

2.2.1

Who are the epicurean e-buyers?

- A more masculine target
- More than half have **started purchasing online less than 5 ago.**

FEMALE **46%** ** European average 56%

AGE **44,7 y.o** 41,3 y.o

19 18 20 43
18-29 30-39 40-49 50 +

MARITAL STATUS

SINGLE **16%** 28%

INCOME
LOWER **70%** European average 56%

CITY SIZE

86% 85%

Urban

56% HAVE STARTED PURCHASING ONLINE LESS THAN 5 YEARS AGO
European average 43%

2,2 3,5
PARCELS in the last month
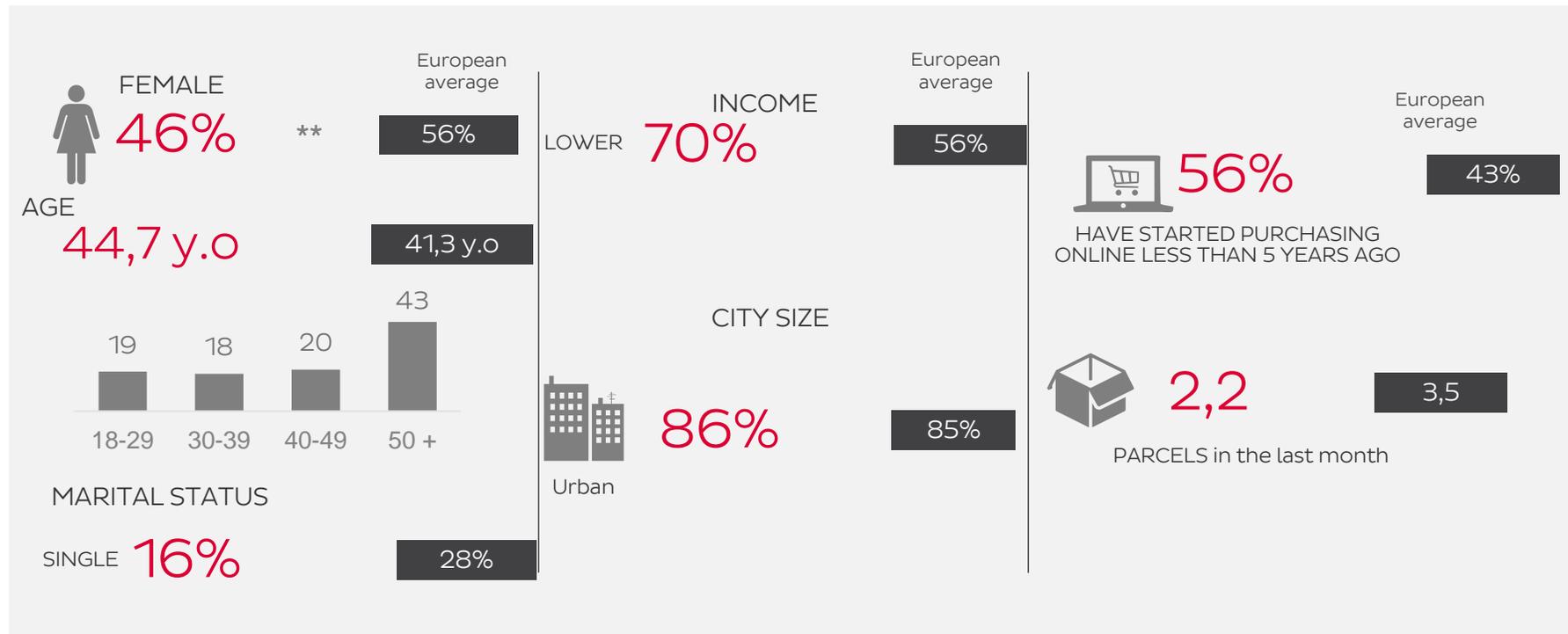
What are the main attitudes of epicurean e-shoppers?

They are...

70% **** "I am always **on the move** and rarely at home"
69%

73% **** "Compared to others I consider myself a **busy person**'"
64%

42% *** "I'm ready to pay a **price premium** for services that **make my life easier**"
57%

83% **** "It is important to **indulge** myself on a regular basis"
80%

...Active and looking for facilitators

...Environmentally friendly

93% *** "Brands and companies have to be **environmentally responsible** these days"
85%

85% **** "I make sure to buy **environmentally friendly products** when possible"
76%

90% *** "I actively look for products and services that help me have a **healthy lifestyle**"
83%

95% *** "I am always on the lookout for a really **good deal**"
91%

85% *** "I look forward to **big discount** events, online or offline, (Black Friday, seasonal sales...)"
81%

82% **** "The most important thing about a brand is that it gives **good value for the money**"
80%

84% *** "**Price** is the most important factor in my purchasing decisions"
79%

...Price oriented

...Connected

91% *** "I actively look for **reviews** and ask for **recommendations** online before making a purchase"
86%

93% *** "I follow or like **brands** on social networking sites"
84%

87% **** "I prefer to buy **well-known brands** as they are more trustworthy"
80%

European average   xx%

What are their main habits when buying online?

- A more selective way of purchasing online

- Open to influencers

- Price sensitive

- With high expectations on delivery

2.2.2

Epicurean e-buyers purchase less categories online than the average Romanian e-shopper.

% – TOP 10 types of goods purchased online since January

		European average		% – at least once a month	European average
Fashion	37	55%	39		49%
Beauty/ Health Care	35	41%	48		46%
High-tech/Electronics	33	28%	9		16%
White goods and home appliances	30	19%	6		5%
Shoes	29	51%	19		20%
Car equipment	25	15%	13		11%
Books	22	33%	34		37%
Sport	17	21%	20		29%
Medicine	17	20%	40		36%
Accessories and jewellery	15 **	23%	22		26%
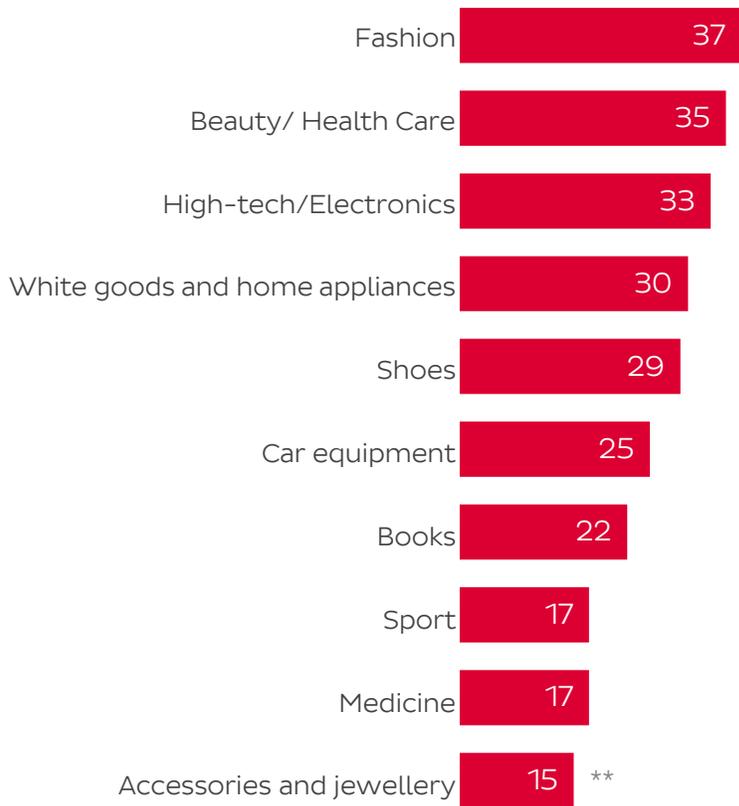
3,5 categories bought on average **

4,8 European average

8% of e-shoppers have also ordered online **fresh food and beverages** since January

European average 14%

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

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Almost all epicurean e-buyers find that e-shopping helps to save time. The e-shopping experience is overall positive for them.

Rating of latest online purchase experience
%

■ Excellent   ■ Very good   ■ Good   ■ Fair   ■ Poor

**

| 35 | 42 | 17 | 4 | 2 |

77 Last online purchase experience was excellent or very good

European average **81**
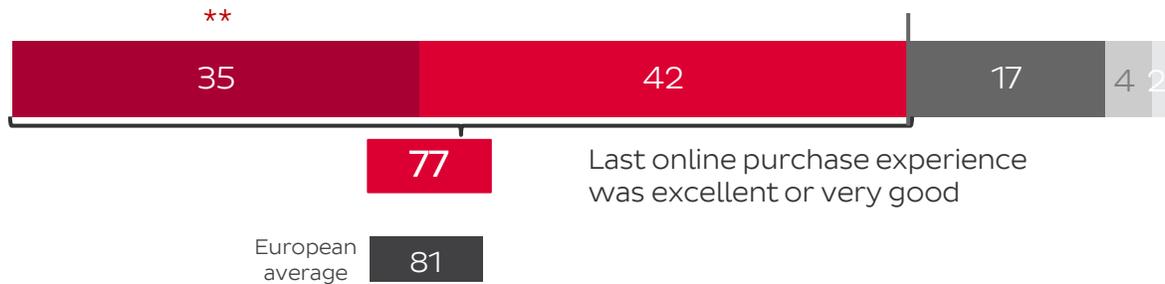
86% **** *"Shopping online is **so convenient** that I use it more and more, even if I must return my purchases sometimes" - %T2B*

84%

97% *** *"Shopping online **saves time**" - %T2B*

92%

88% *** *"Shopping online strongly **reduces the stress** of buying in stores" - %T2B*

84%

They are highly connected on social media and like to publish their feedback after purchase.

% – Top influencers

	European average
It is a website brand I trust	**55**	61%
Recommendation of relatives/ colleagues on social media	**45**	45%
Advertising on social media	**44**	28%
Online advertising (video banners)	**37**	25%
Traditional advertising (magazines/ TV/ Street board)	**30** **	16%
Youtubers/ videos from specialists	**25**	17%
Specialist blogs	**23**	13%
Word-of-mouth	**17**	32%
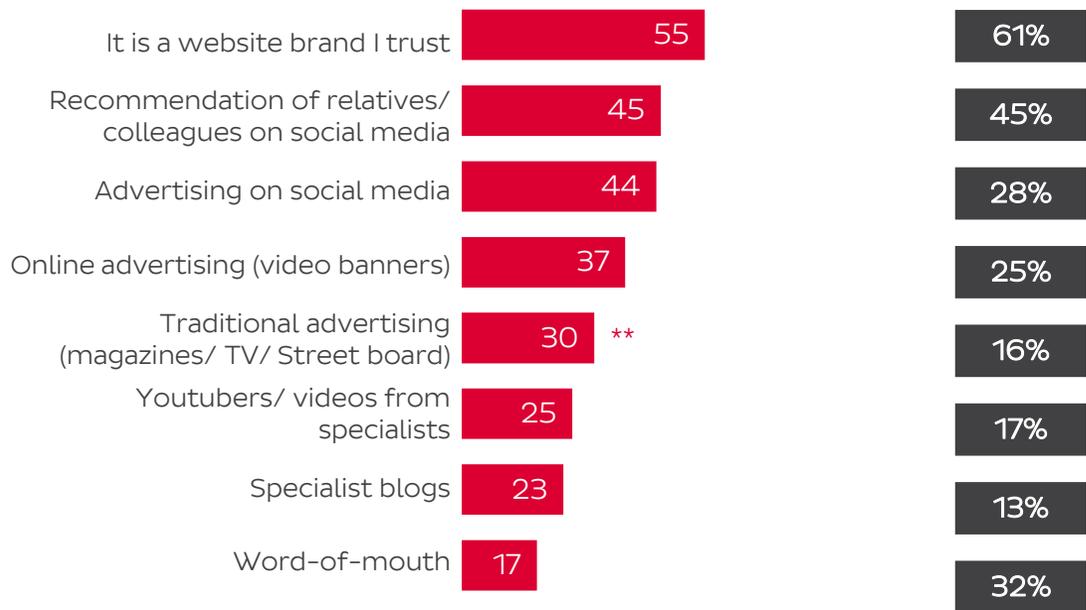
Average number of influencers **2,8**

European average **2,4**

% – Top 5 social networks used

Facebook	YouTube	Instagram	LinkedIn	Pinterest
93	78	41	20	19
85%	72%	51%	17%	20%

European average

2,8 on average

2,9 European average

83%
Publish or give feedback after purchase

European average **78%**

C18. When shopping online, how do you choose a website?
C2a. Do you use any of the following social sites at least once a week?
C19. Do you publish or give feedback, after purchasing?

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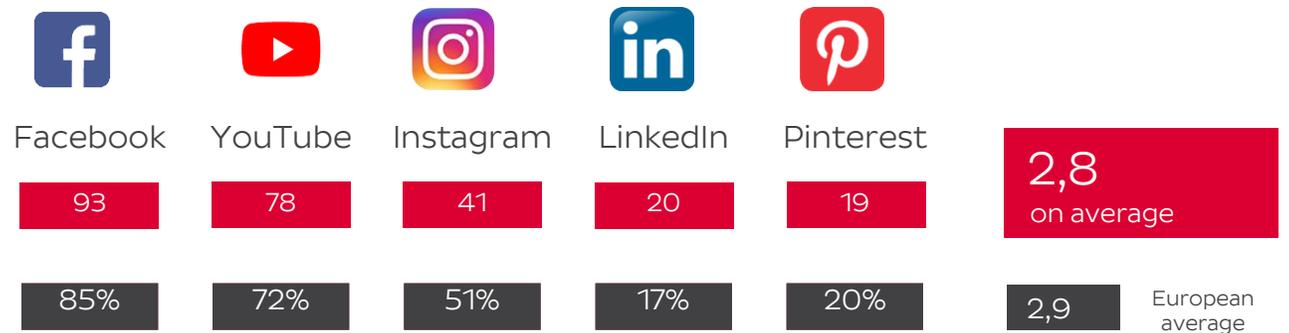
# Highly connected, they are more likely to use their smartphone on top of their laptop or desktop for their online purchases.

Devices used to shop online
%

European
average

Smartphone 74 — 69%

Laptop 59 — 57%

Desktop 45 — 42%

Tablet 16 — 28%

Average number of devices used to order: 2,0

European average: 2,0

Almost all their orders are delivered directly at home, with post offices or the work place as alternatives. Delivery is perceived as effortless.

Usual delivery places
%

Delivery place	Value	European average
At home	91	85%
To a post office	24	21%
At work	22	14%
To a central collection depot	8	5%
To a parcel locker station	7	14%
To an alternative address	7	8%
To the retailer's store	4	11%
To a parcel shop		16%
At your neighbour's home		11%
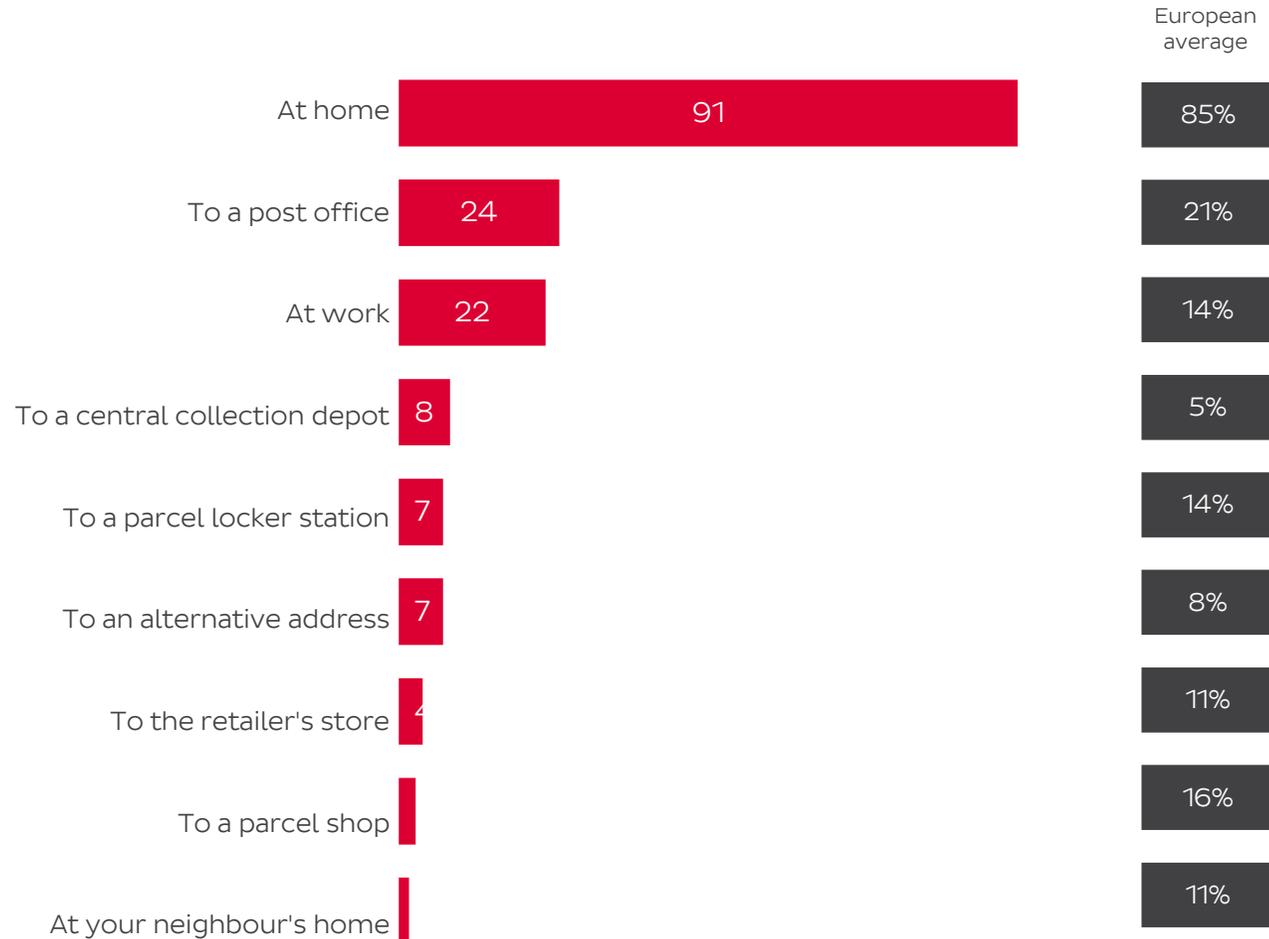
44% usually use more than one delivery place

European average **48%**

Average number of delivery places used:

1,7   European average **1,9**

83% ... found delivery easy/effortless

European average **79%**

C14 – Where do you usually have your parcels delivered to? Base: All (339)
Rq: Several answers allowed

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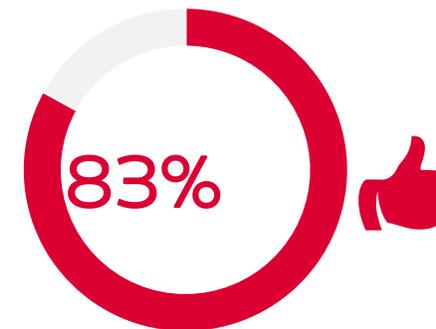
They are more frequent users of delivery services such as the selection of a specific timeslot and notifications per email/SMS.

Delivery services already used
%

Delivery on a specific day and a 1h timeslot pre-selected by you — **36** **

European average: **40%**

Delivery within 1 to 2 hours after ordering online — **15**

European average: **21%**

91%
European average **77%**
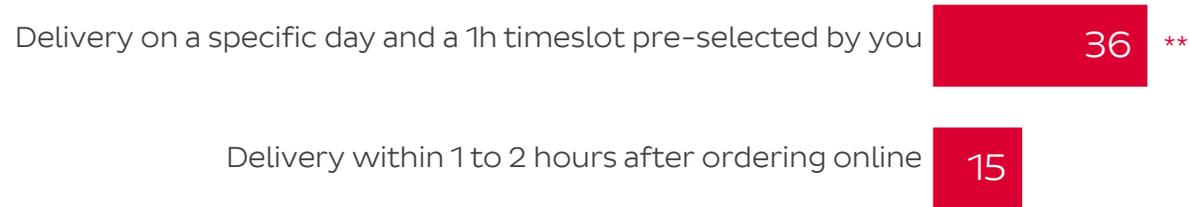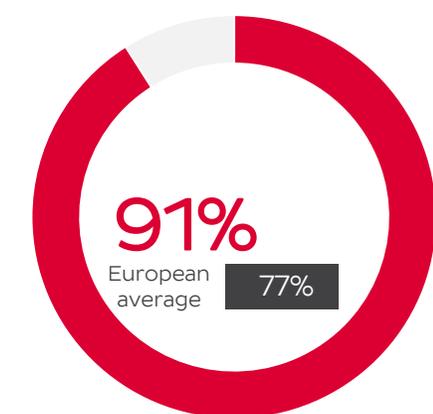
… were notified via email or SMS for their last purchase

Bad opinion is their main barrier to purchasing on a specific website, with items not on stock and transit times coming after.

Top 10 features that prevent the most from buying online
% – (out of 15 criteria)
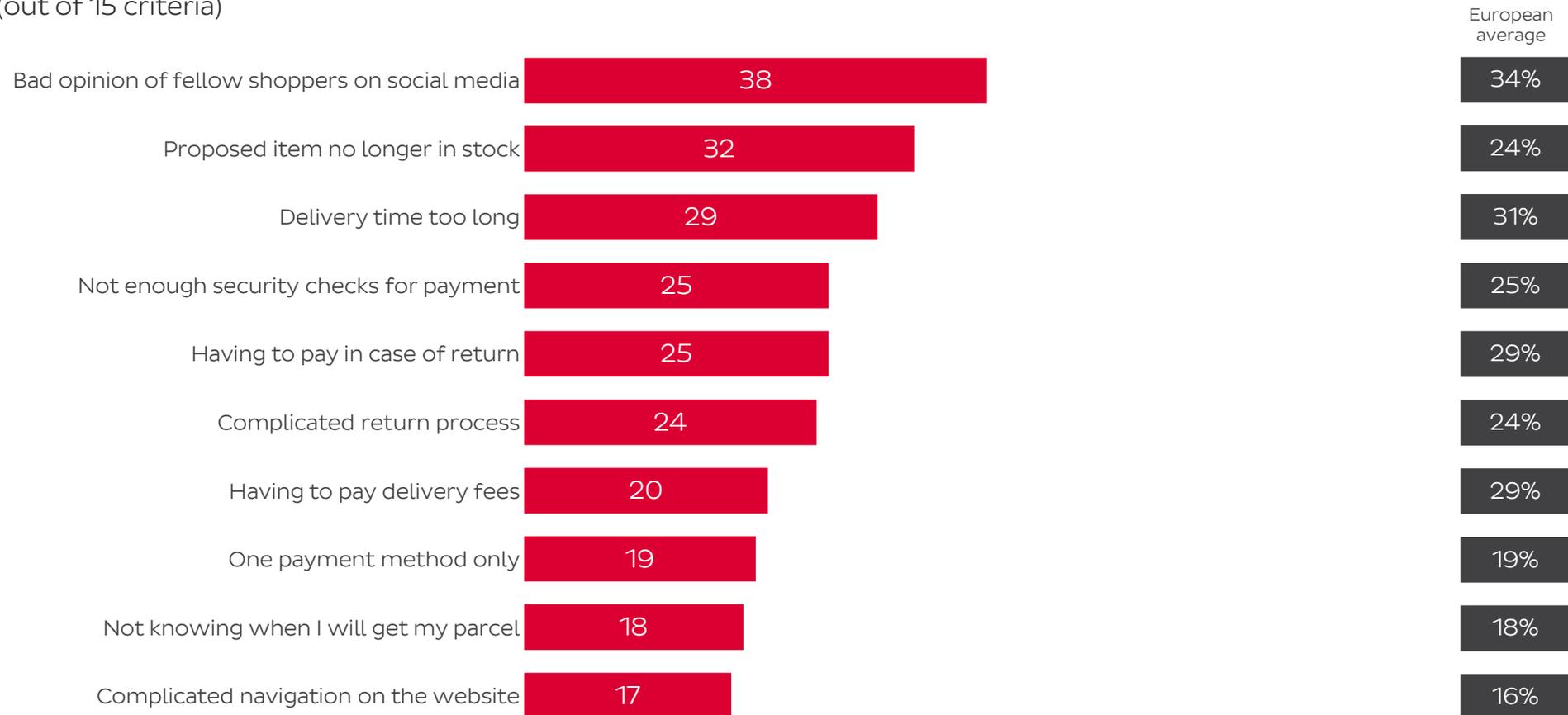
European average

Feature	%	European average
Bad opinion of fellow shoppers on social media	38	34%
Proposed item no longer in stock	32	24%
Delivery time too long	29	31%
Not enough security checks for payment	25	25%
Having to pay in case of return	25	29%
Complicated return process	24	24%
Having to pay delivery fees	20	29%
One payment method only	19	19%
Not knowing when I will get my parcel	18	18%
Complicated navigation on the website	17	16%

B2a – Among the selected criteria which one prevents you the most from buying online? And the second, the third?
Rq: Three answers allowed

Epicurean e-buyers are in need of reassurance regarding the delivery service and therefore they consider it very important to know the carrier company.

87% **

European average

77%

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

% – Top reasons of importance in knowing the delivery company (n=293)

I think it is reassuring/comforting to know who will deliver my parcel — 51 | 44%

I would like to choose one which guarantees a good delivery service — 35 | 38%

I had bad experience(s) with a specific delivery company and try to avoid using it — 21 | 24%

I have preferences when it comes to delivery companies — 20 | 25%

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?

E-shopper barometer – Country report | November 2019 | 52

Only 6% of epicurean e-buyers returned their last purchase, yet about half of them considered it not so easy, although a majority of them checked the return policy before buying.

6%

European average

11%

... returned their last purchase

45%

European average

45%

... did not find it easy/effortless

Top 3 Return Methods
(n=88)

59% Carrier picking it up at home
| 31% |

12% Dropping it off at a post office
| 42% |

9% Carrier picking it up at workplace
| 6% |

Return Policies
(n=88)
E-shopper who returned a parcel in the past 12 month looked at the return policies...

75% *** Before buying
| 57% |

14% During purchase
| 24% |

11% At the moment or return
| 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?

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E-shopper barometer – Country report │ November 2019 │   53