



E-commerce in Serbia 2017

Media partners:



October 2017

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General information about the study

METHODOLOGY

The study was conducted by an online survey in the pop-up format.

The survey was shown to randomly selected Internet users on the following sites: **alo.rs, b92.net, kurir.rs, novosti.rs, srbijadanas.com, telegraf.rs**

The survey questionnaire consists of 35 questions (29 key survey questions and 6 socio-demographic questions).

Structure of the sample **is corrected** by weighting the analytical data by gender, age and region of the respondents.

The sample (N) - the actual number of respondents of the questionnaire.

TARGET GROUP

Target audience: Serbian internet audience, age 18+.

SURVEY

PERIOD

SAMPLE

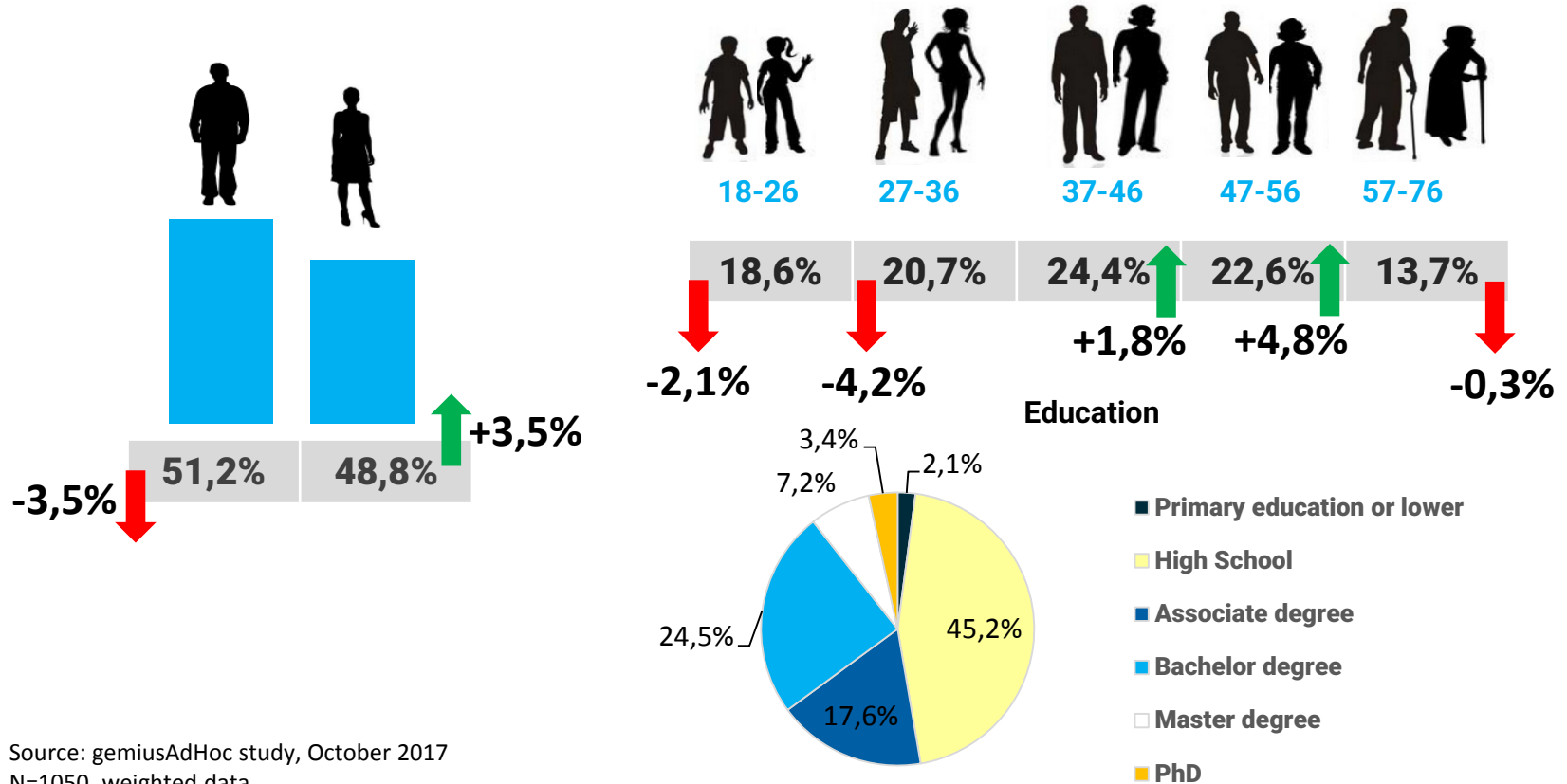
E-Commerce AdHoc

October 2st – October 15th

>>

N=1050
(weighted
data)

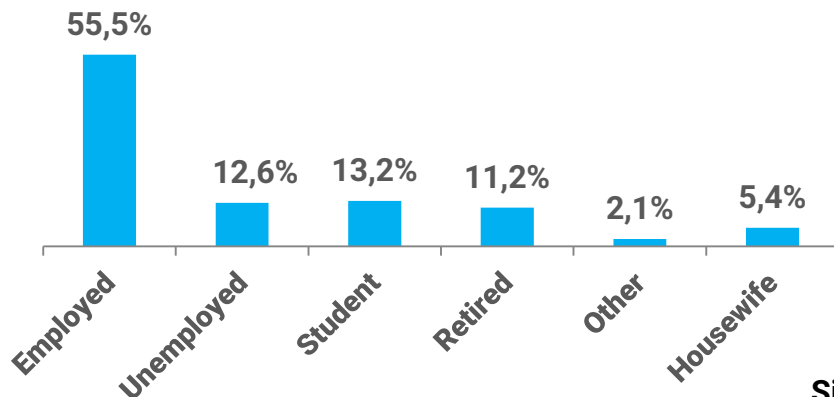
Socio – Demographic Profile of Respondents



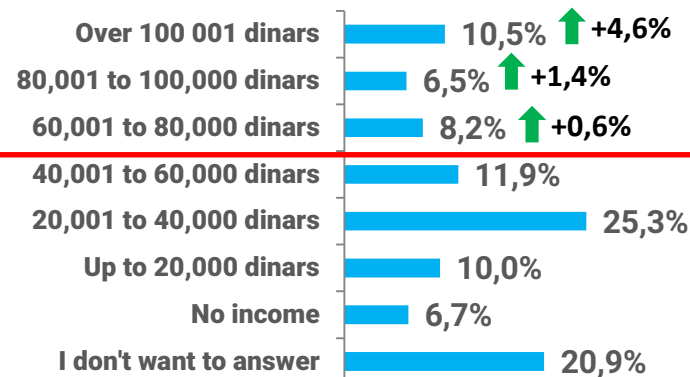
Source: gemiusAdHoc study, October 2017
N=1050, weighted data

Socio – Demographic Profile of Respondents

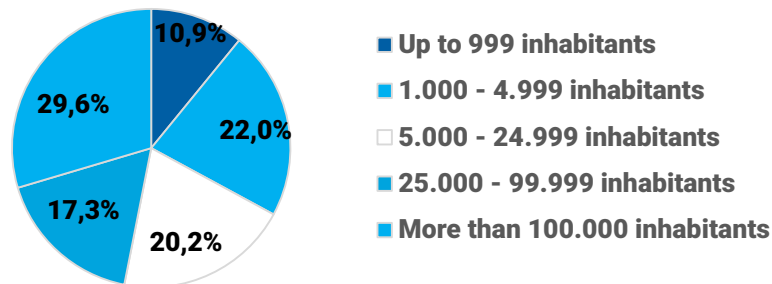
Employment status



Monthly net income

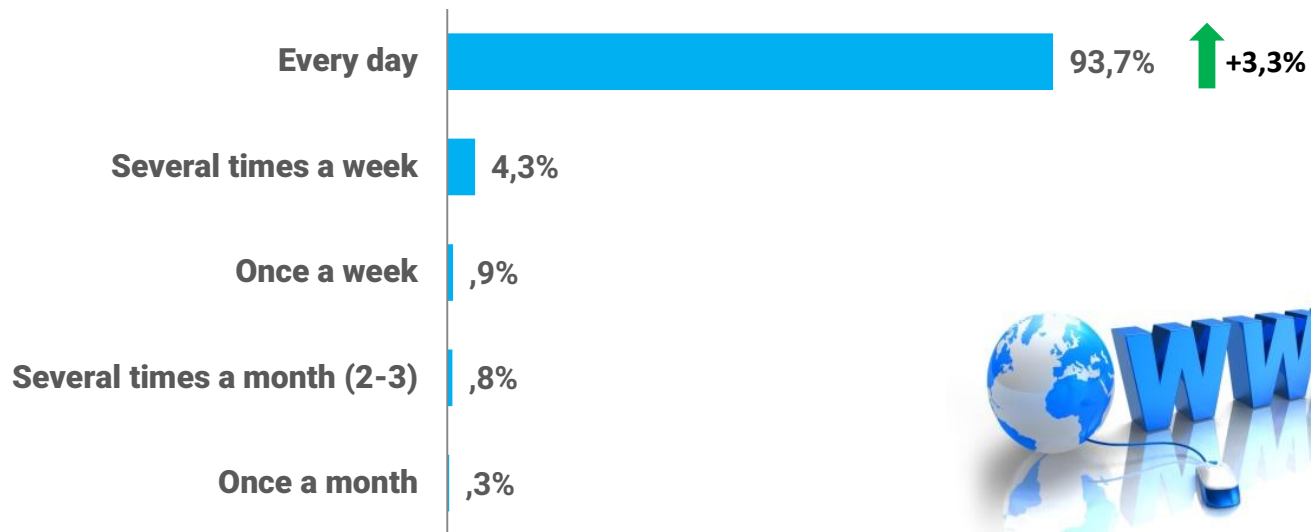


Size of settlement



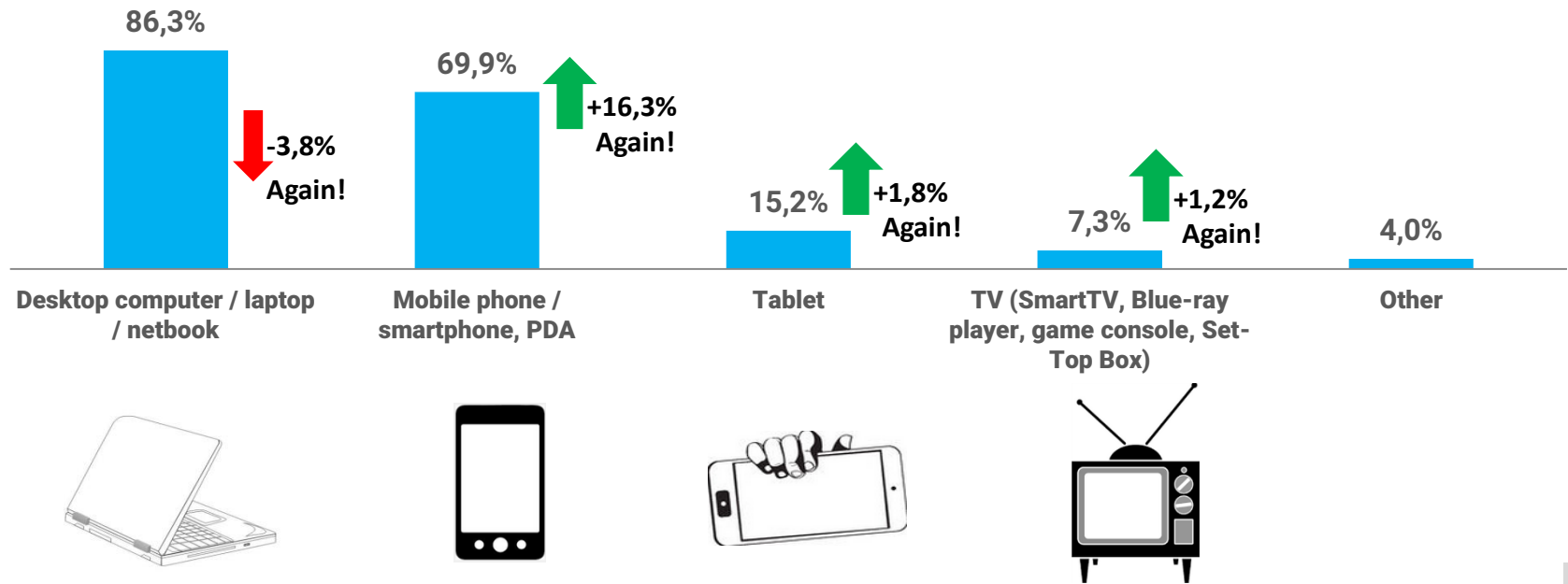
Frequency of Internet usage

How often do you use Internet?



Types of devices for Internet connection

Please indicate all types of devices that you use to connect to the internet at least once a month.

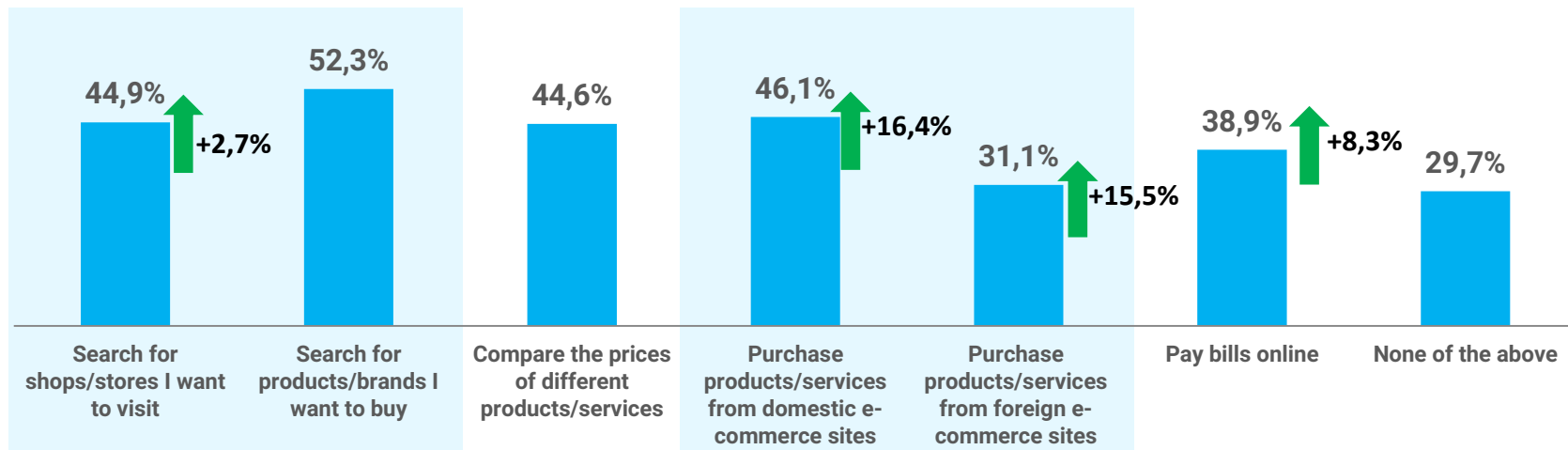


Source: gemiusAdHoc study, October 2017
N=1050, weighted data

Please indicate of the following activities the ones you have carried out online.

Top 3 online activities are:

1. Search for products / brands
2. Purchase products / services from domestic sites
3. Search for shops / stores I want to visit



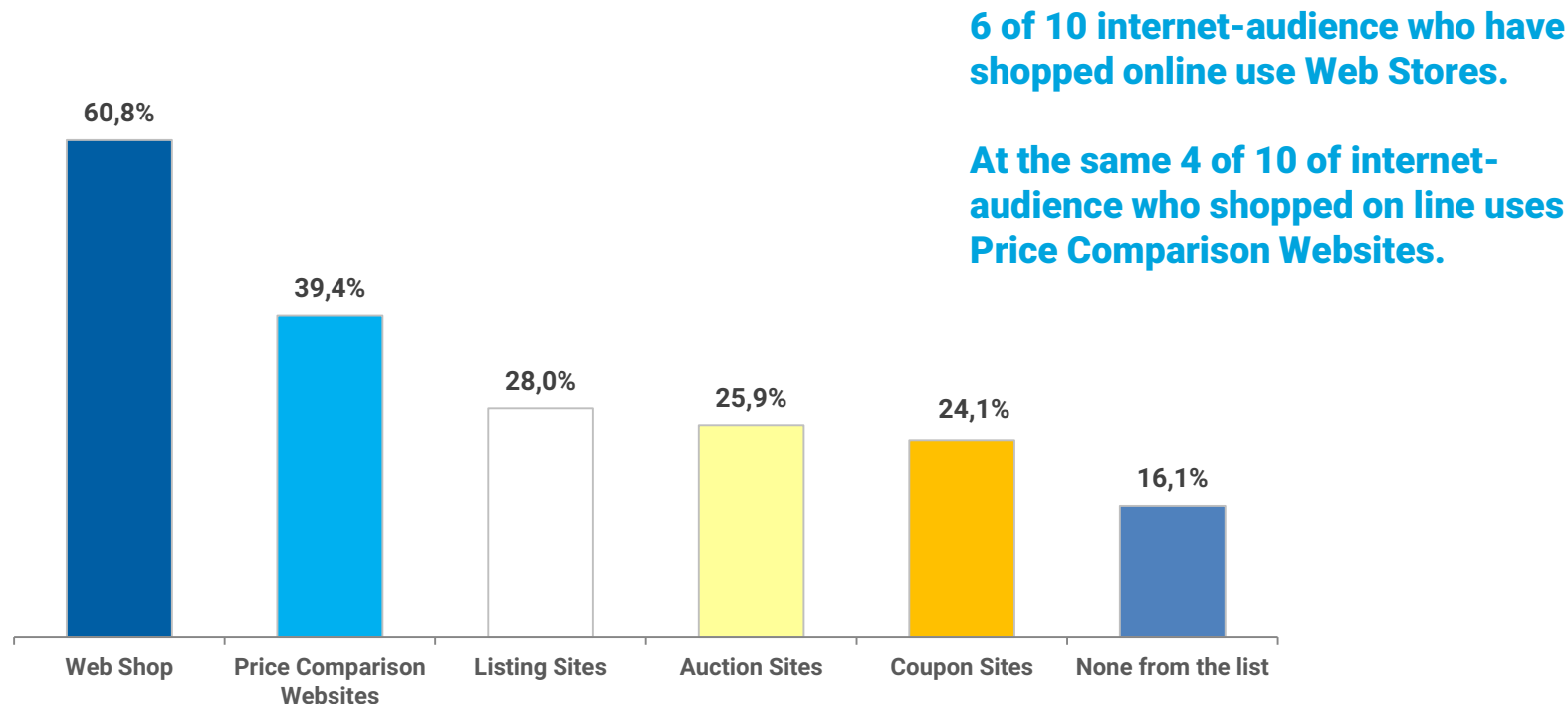


- › **Buy most often:**
 - › Still men, **but it changes**
 - › age 37-46 (last year 27-36), **biggest growth in group – 47-56 😊**
 - › monthly income – 20001-40000 dinars (**the same as last year, but...**)
 - › use internet everyday (**even more**)
 - › most often on desktop / laptop (**still, but the difference is smaller y2y**)
 - › but often and often on mobile (**even more**)
- › **Last year recommendations are still valid:**
 - › take care about youngest consumers
 - › prepare for growing number of older consumers
 - › prepare your business for mobile - UX

Analysis of internet-audience who have shopped online

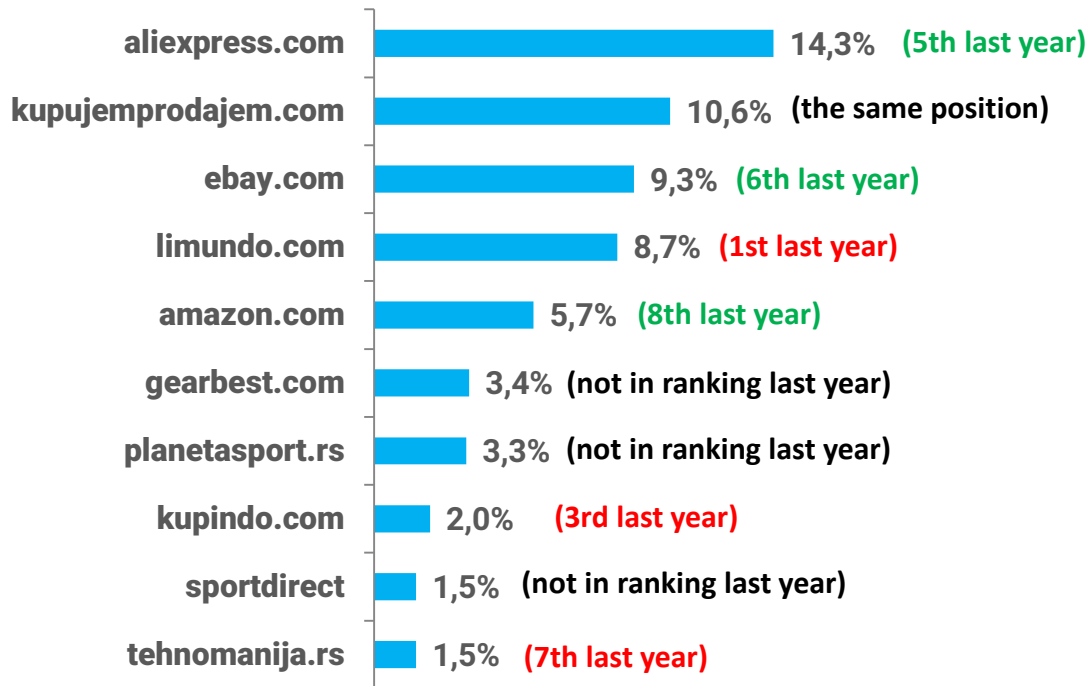


Please indicate of the following types of e-commerce sites the ones that you have personally used:



E-commerce websites: TOP-10

List up to 5 of your favorite e-commerce sites:



Top 3 favorite e-commerce websites within analyzed audience are:

1. aliexpress.com
2. kupujemprodajem.com
3. ebay.com

61% internet-audience who have shopped online claim that they don't have favorite e-commerce site

Reasons to shop online

What are the reasons that motivate you to shop online?

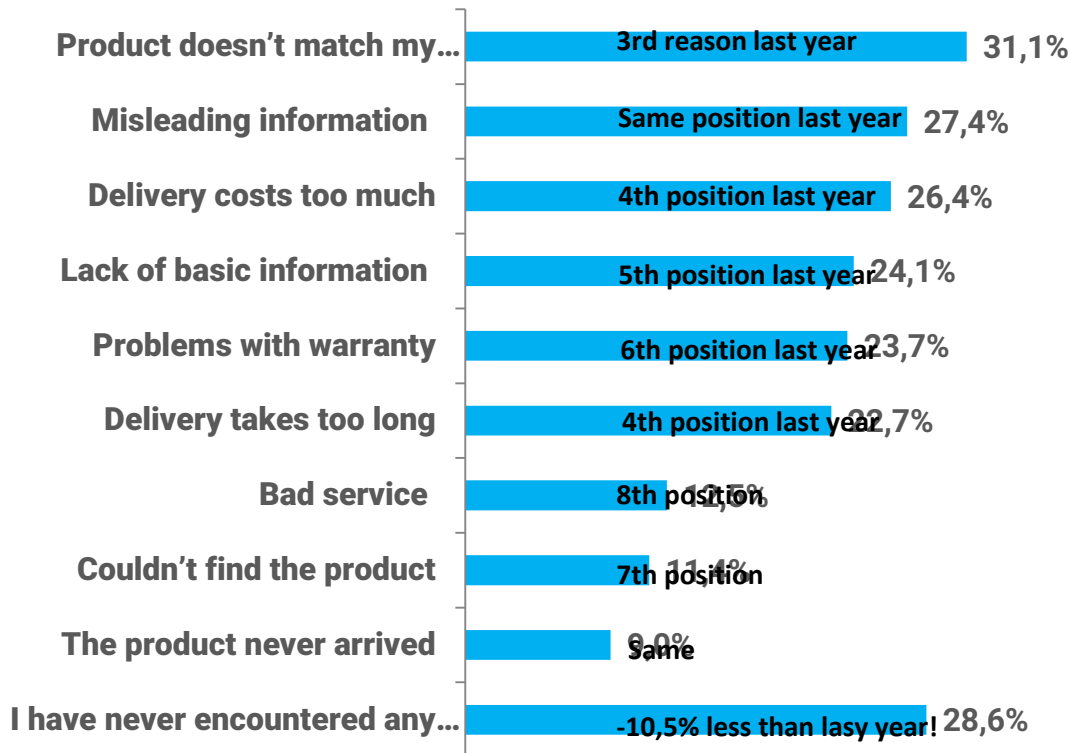


Top 5 reasons why respondents bought something online:

1. Easier to compare all offers
2. Home delivery
3. No need to travel to the store
4. Better prices than traditional stores
5. Stores never close

Obstacles while shopping online

Which of the following obstacles have you encountered while shopping online?

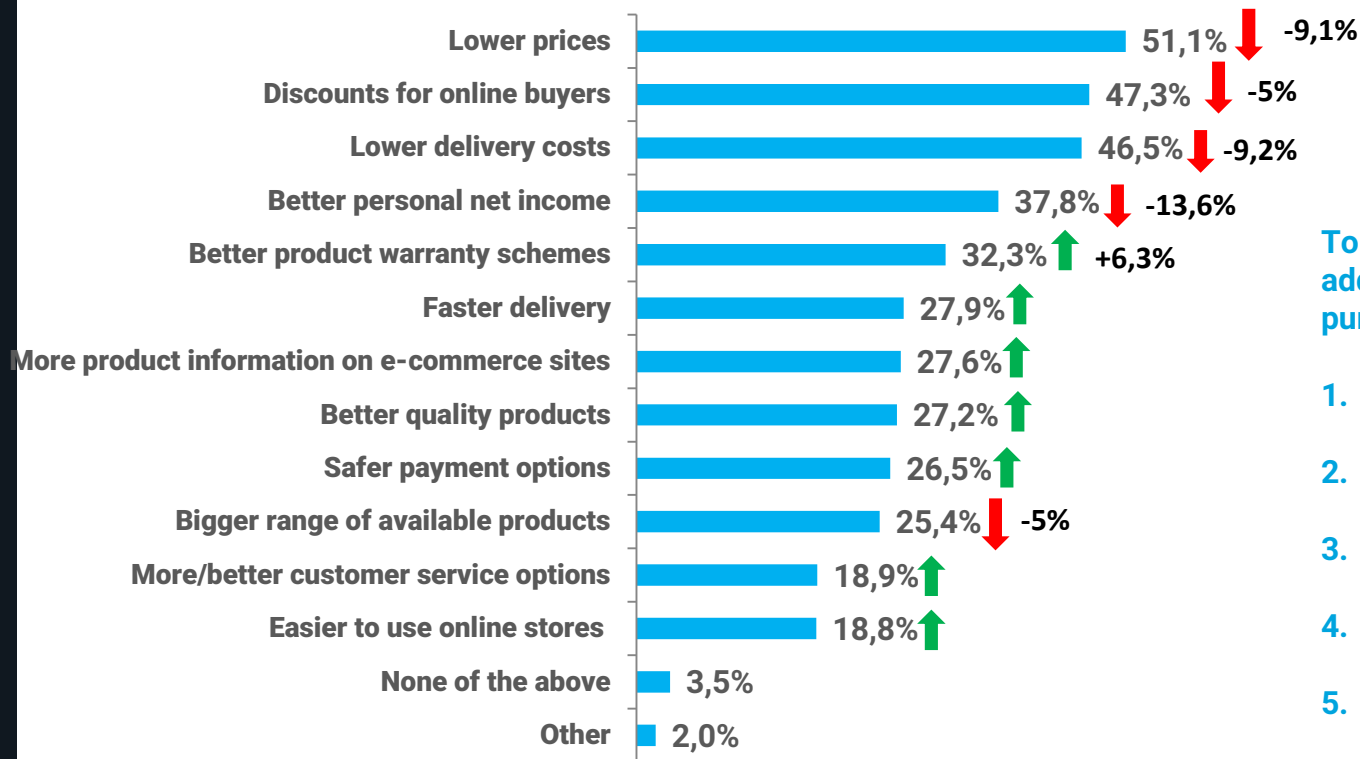


Top-5 online shopping obstacles:

1. Product doesn't match expectations
2. Misleading information
3. Delivery costs too much
4. Lack of basic information
5. Problems with warranty.

Almost third of respondents claim that they never had a problem while shopping on-line.

What could motivate you to make more online purchases?



Top 5 factors that could additionally motivate on online purchases:

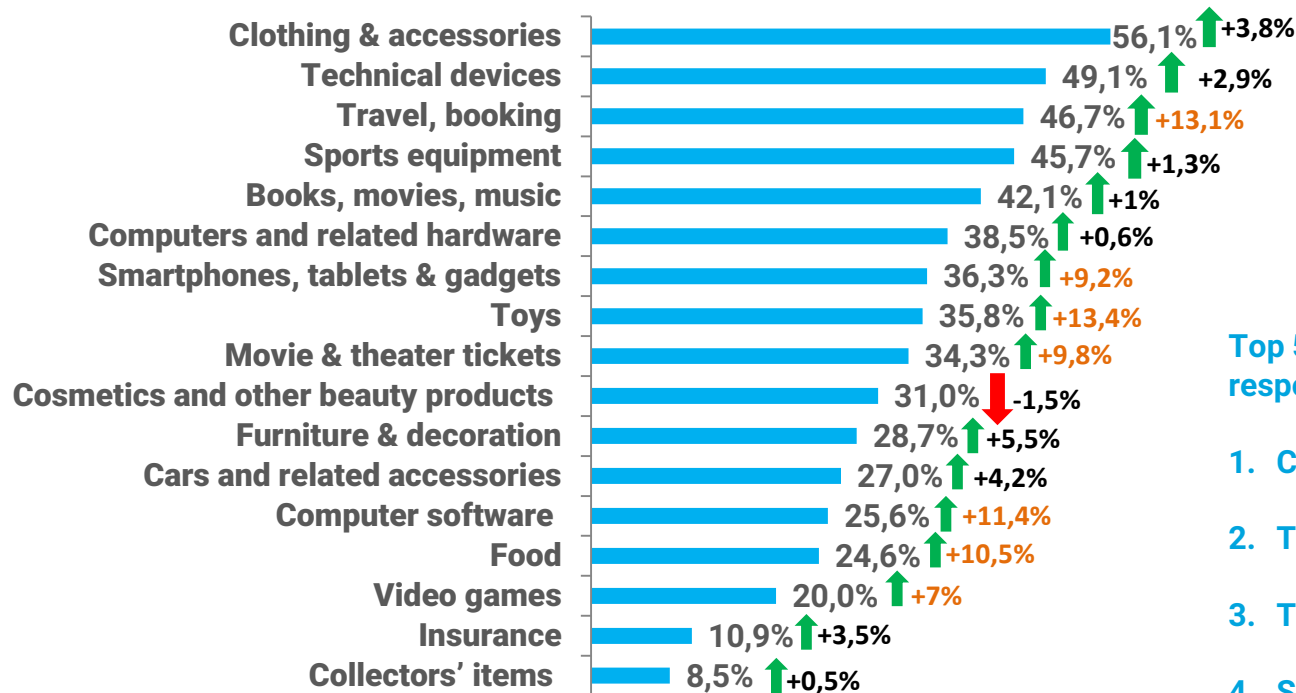
1. Lower prices
2. Discounts for online buyers
3. Lower delivery costs
4. Better personal net income
5. Better product warranty schemes.

Source: gemiusAdHoc study, October 2017

N=692, weighted data

Previously purchased goods: online

Please mark, which of the following categories you have bought online.

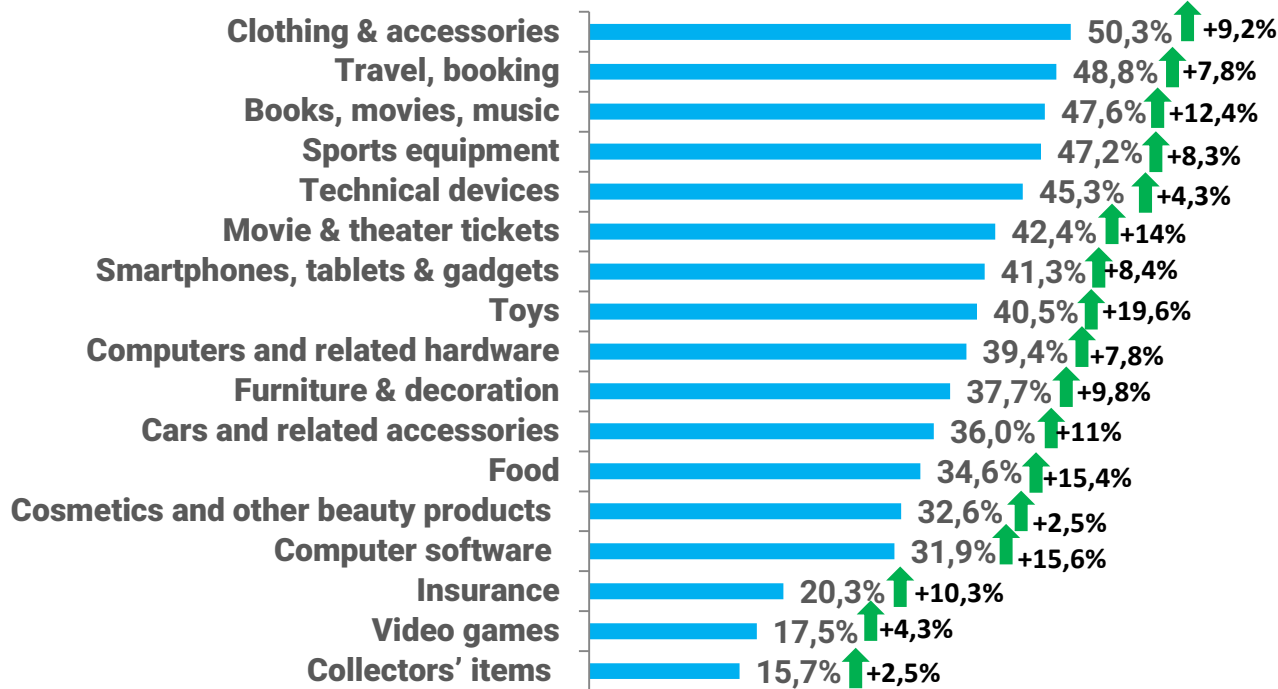


Top 5 categories which respondents have bought online:

1. Clothing & accessories
2. Technical devices
3. Travel, booking
4. Sports equipment
5. Books, movies, music.

Willingness for buying certain categories in the future: online

Please mark, which of the following categories you are willing to buy online in the future.

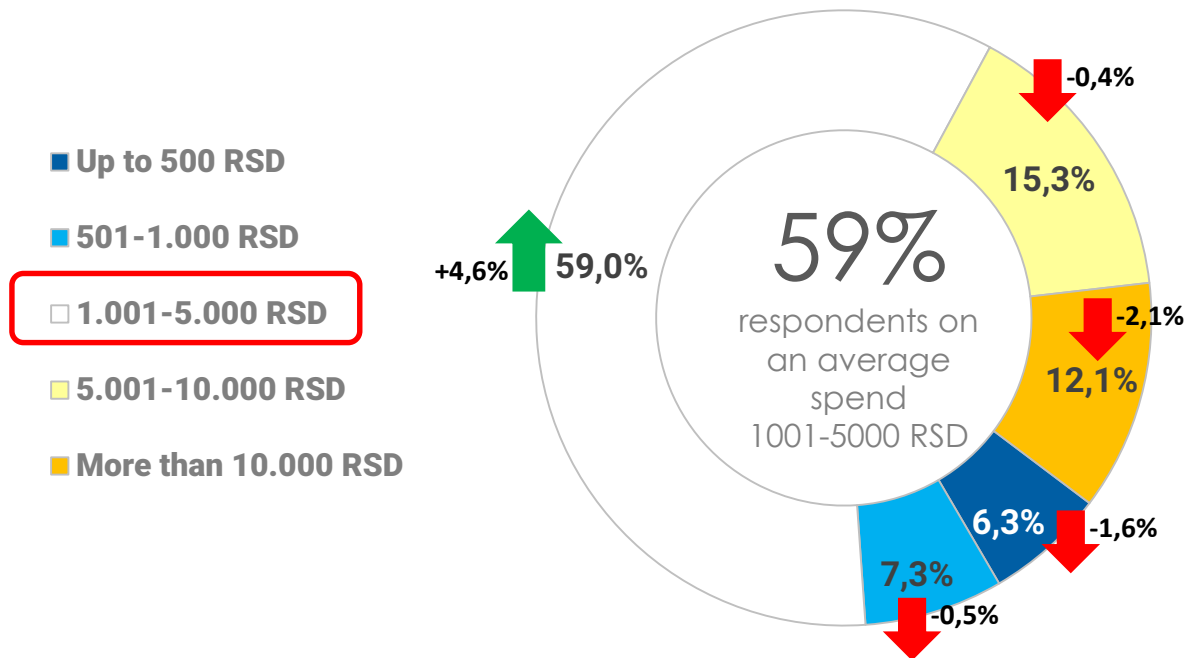


Top 5 categories which respondents are willing to buy online in the future:

1. Clothing & accessories
2. Travel, booking
3. Books, movies, music
4. Sports equipment
5. Technical devices

Online purchases: money estimation

Please estimate how much you spend on an average “shopping cart” when shopping online.



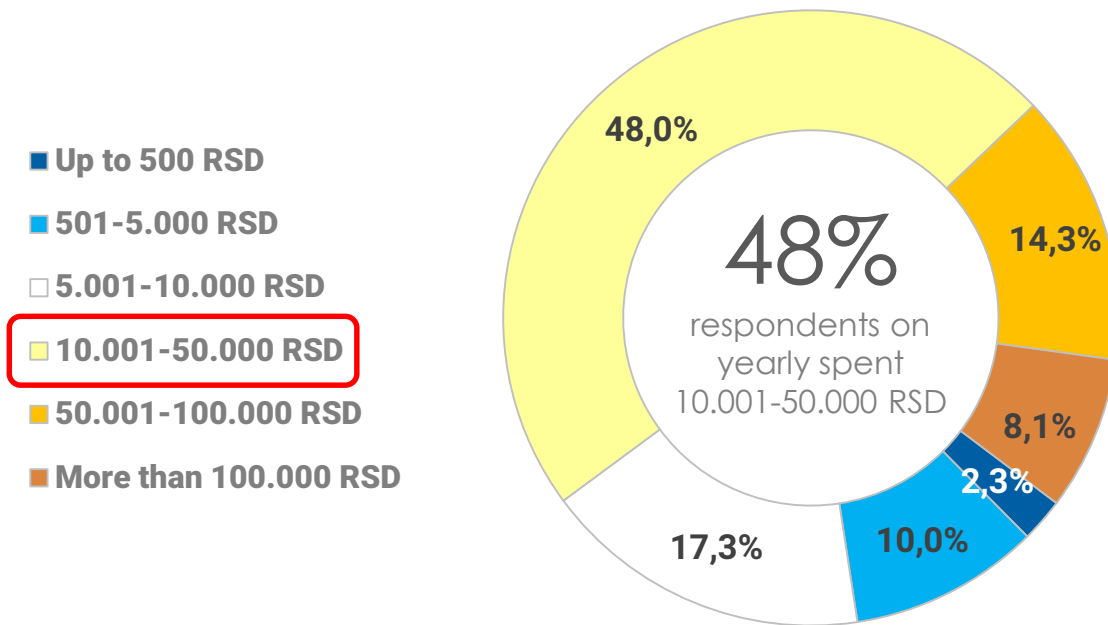
An average online “shopping cart” costs are from 1.001 to 5.000 RSD (59%).

For 15,3% respondents it's in range between 5.001-10.000 RSD.

12,1% of respondents spend on their average shopping cart more than 10.000 RSD.

Online purchases: money estimation

Please estimate how much money you spent shopping online in **the past year**.

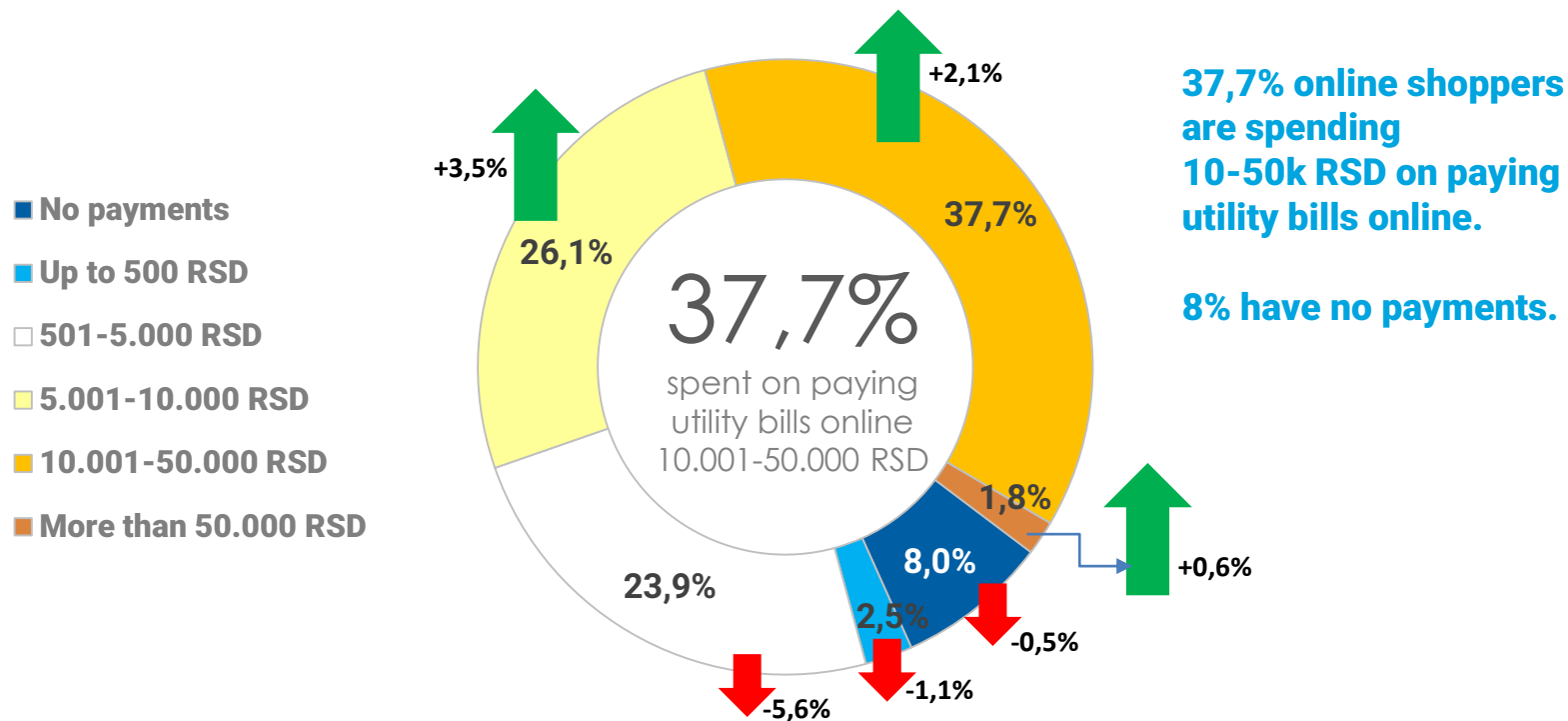


For almost half of respondents yearly costs for online shopping are 10.001-50.000RSD.

For 29,6% the sum is lower - it's up to 10.000 RSD.

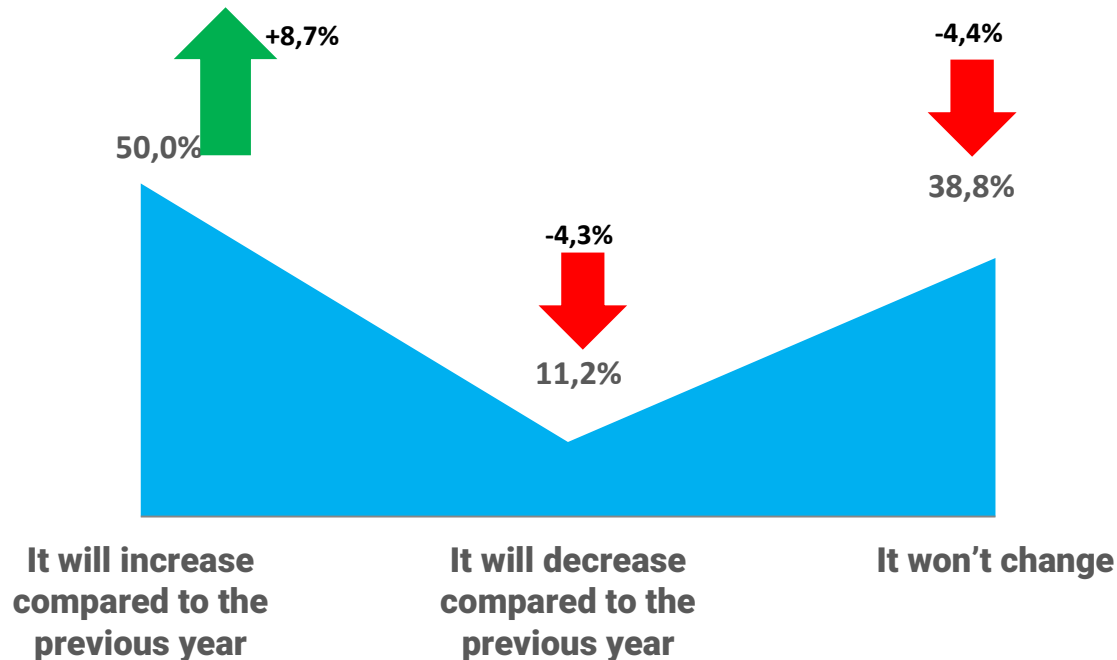
And for 22,4% the sum is higher – 50.001 RSD and more.

How much do you spend in a **month** on paying utility bills online?



Online purchases: future money spending

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



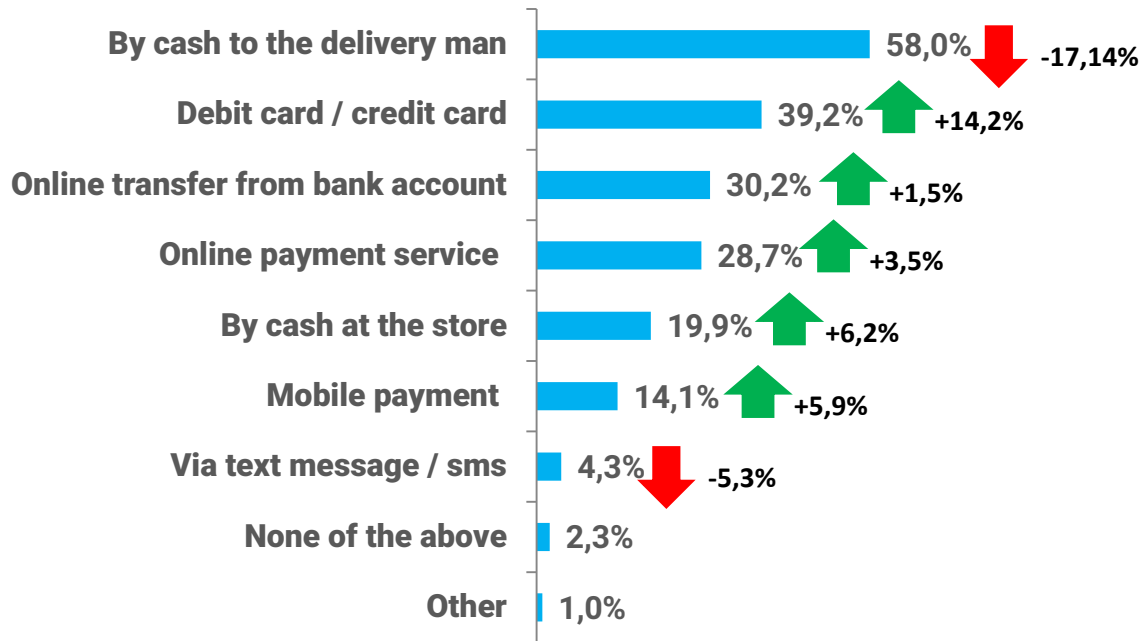
50% respondents claim that their online spending will increase in the next year.

For 38,8% it won't change comparing to this year.

And 11,2% think that their online spending will decrease in the next year.

The most reliable options for online payment:

Please mark which of the following payment options you find the most reliable when making online shopping.



Top 3 the most reliable payment options for online shopping:

1. By cash on delivery
2. Debit card / credit card
3. Online transfer from bank account.

Text message / sms are seen as reliable form the side of only 4,3%.



› Worth to remember:

- › **Foreign shops and platforms are much more popular than last year!**
- › **Older customers expect different approach (meet the expectations, deliver more reliable information)**
- › **Lower prices, discounts, delivery costs – counts all together, but don't play most important role separately for educated costumers**
- › **Customers in Serbia wants to buy clothes, technical devices, travel bookings and sport equipment most often**





› Worth to remember:

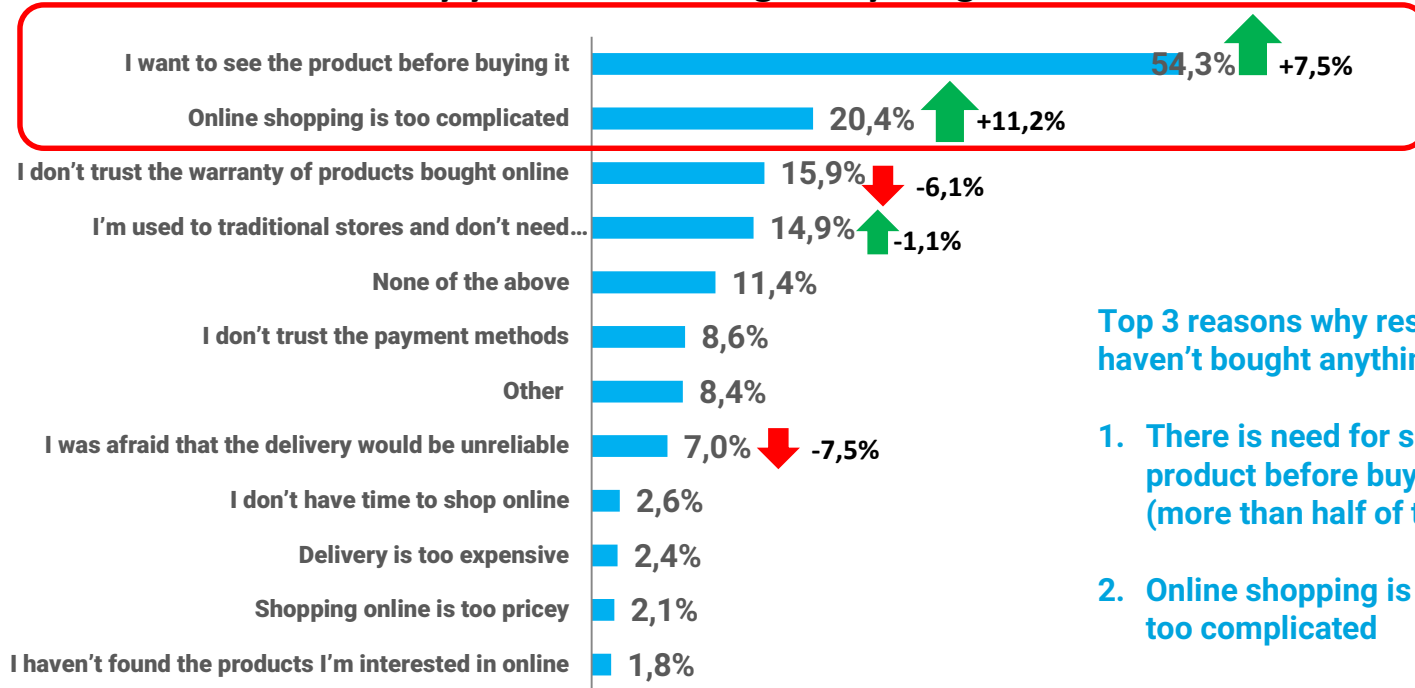
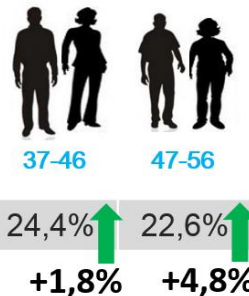
- › Average **shopping cart value is between 1001-5000 RSD** it's great opportunity to increase a value of basket and make customers to do 2nd and 3rd shopping – **what about website analytics (bounce rate, customer journey, traffic source optimization, proper offers for 1st, 2nd and 3rd time buyers?)**
- › **50% (8,7% more than last year)** wants to **spend more online next year**
- › **TRUST!** Over 17% less customers than last year prefer to pay to the delivery men = **your money are safer!**

Analysis of internet-audience who haven't shopped online



Reasons of refusing online shopping

What are the reasons why you haven't bought anything online?

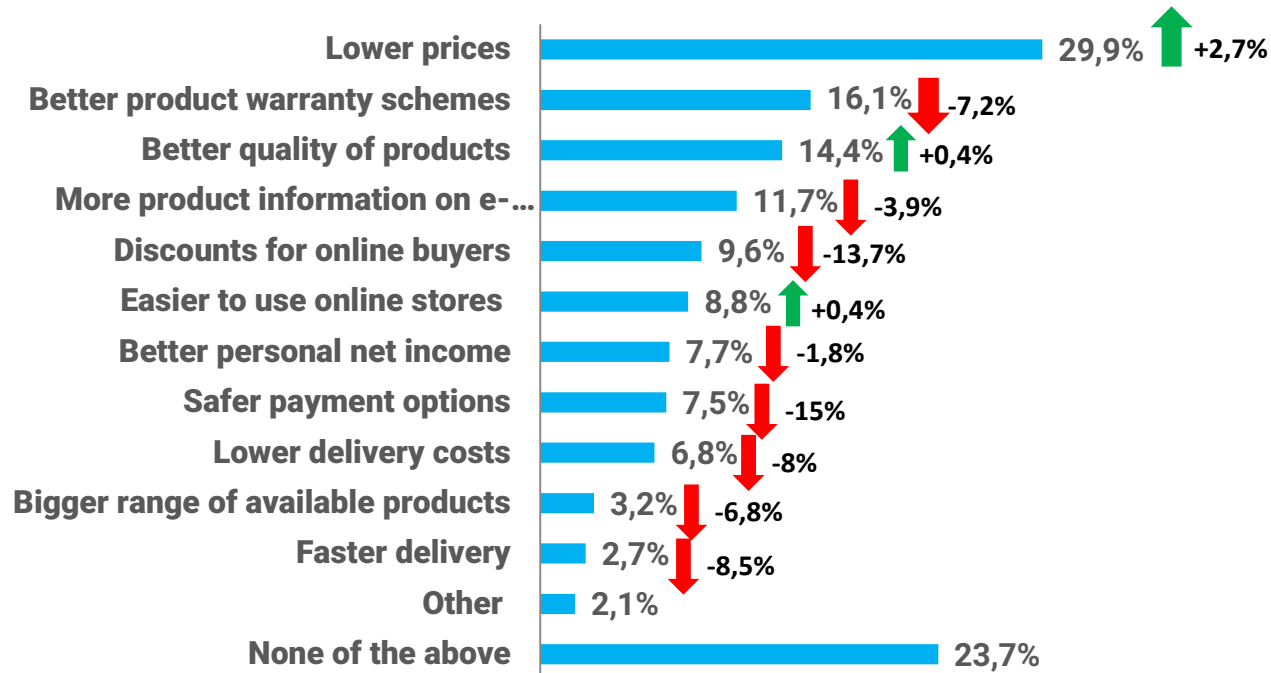


Top 3 reasons why respondents haven't bought anything online:

1. There is need for seeing the product before buying it (more than half of them)
2. Online shopping is seen as too complicated
3. There is low level of trust in the warranty of products bought online.

Motivation to purchase online in the future

What could motivate you to shop online?

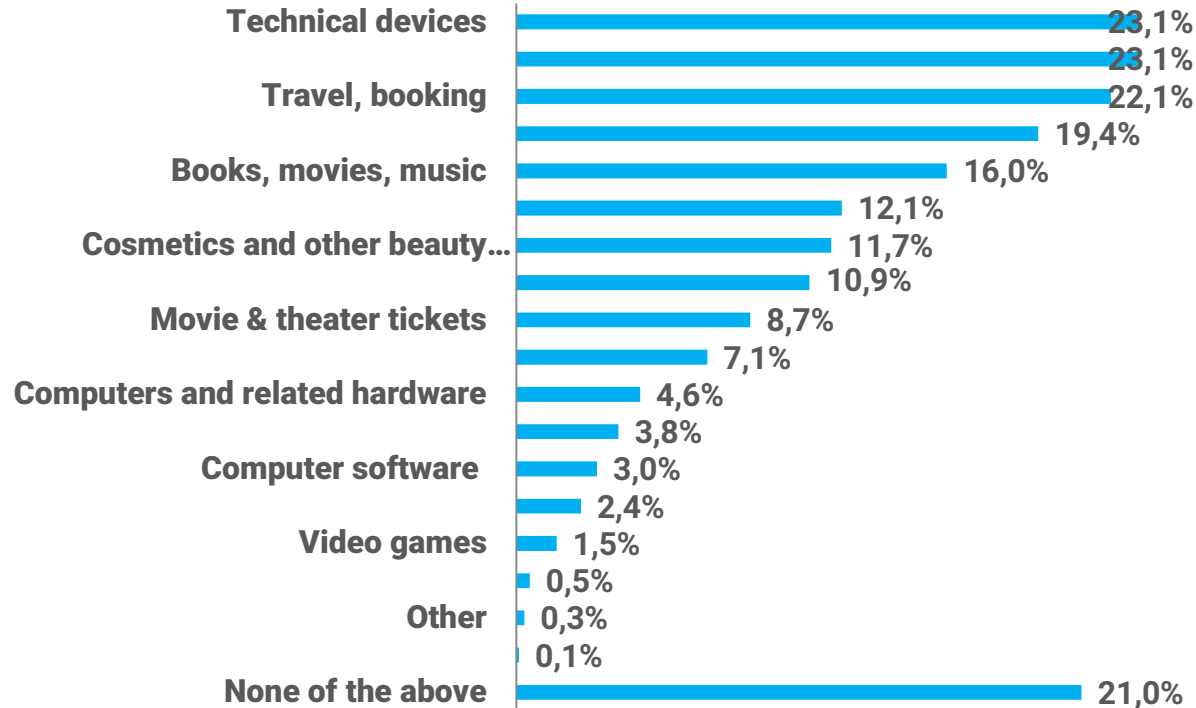


Top 5 factors that could motivate on online shopping:

1. Lower prices
2. Better product warranty schemes
3. Better quality of the products
4. More info on e-commerce sites
5. Discounts for online buyers

Willingness for buying certain categories in the future: online

In the future, if you were to try online shopping, what products do you think you would be interested in?



Top 5 categories for which respondents would be interested in the future:

1. Technical devices
2. Clothing & accessories
3. Travel booking
4. Cars and related products
5. Books, movies, music.



› Worth to remember:

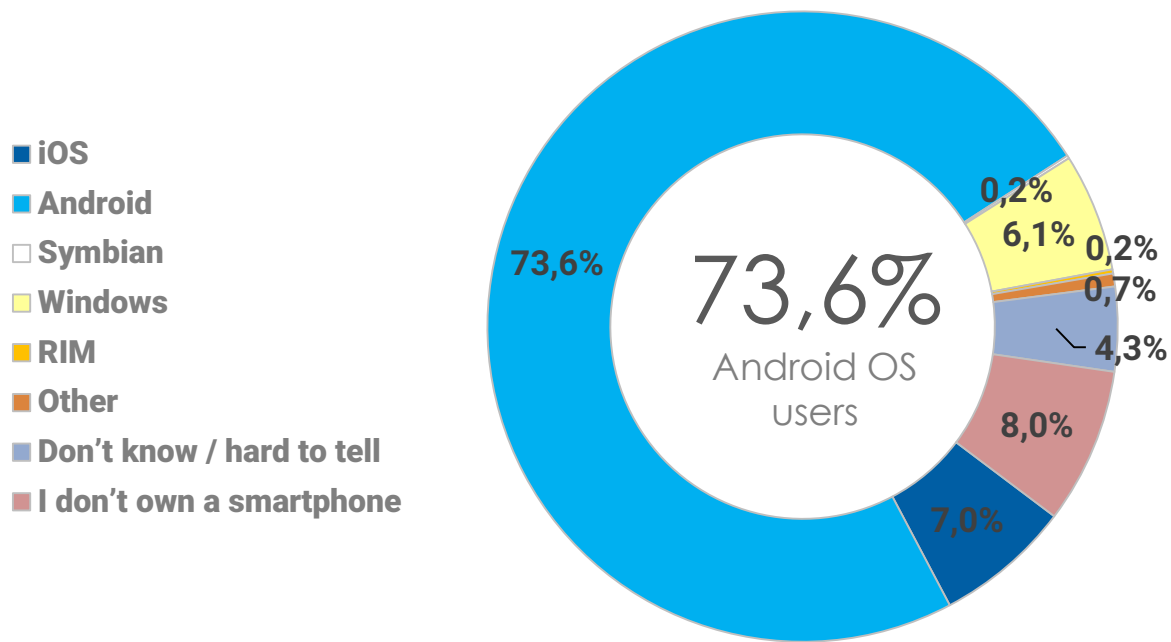
- › **Olders customers are more used to experiencing product before buying.**
- › **They expect clear and easy path from /home to /thank-you-page**
- › **Are there clear OFFER and CTA on your website? What is the role of your website?**
- › **Smart content sells products ideas**



Analysis of mobile users



What operating system smartphone do you use?

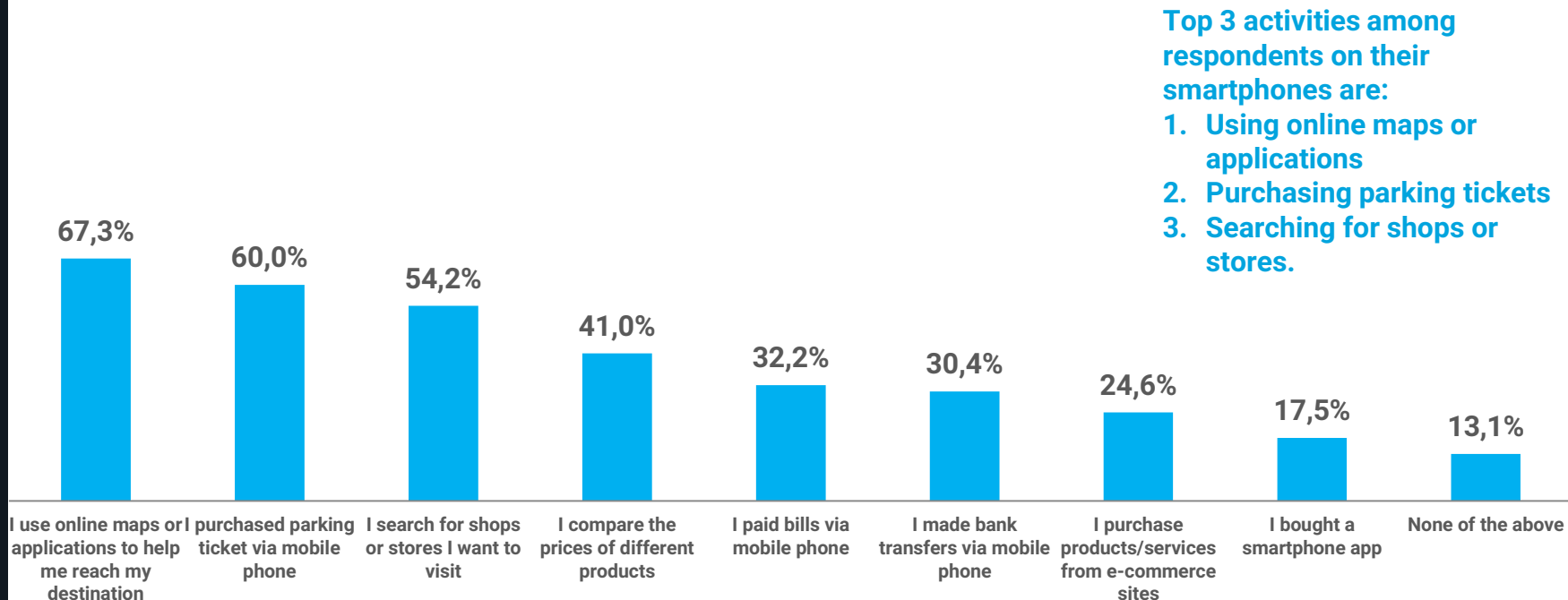


The biggest number of respondents, who own a smartphone are using Android operating system.

8% of respondents, who use a mobile phone, don't own a smartphone.

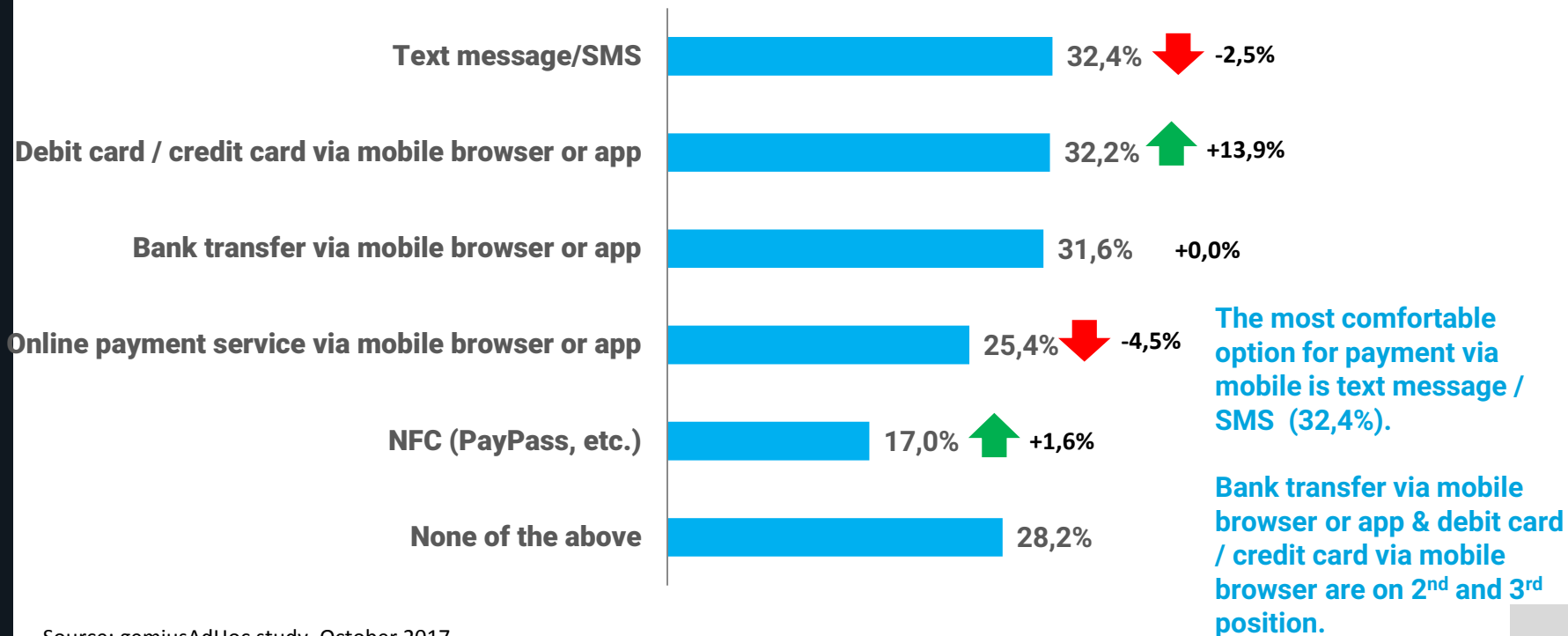
Online activities on mobile phone

Please, of the following mark any activities that you carried out on your mobile phone.



Mobile payment options

Please mark any of the following mobile payment options that you would be comfortable with using.

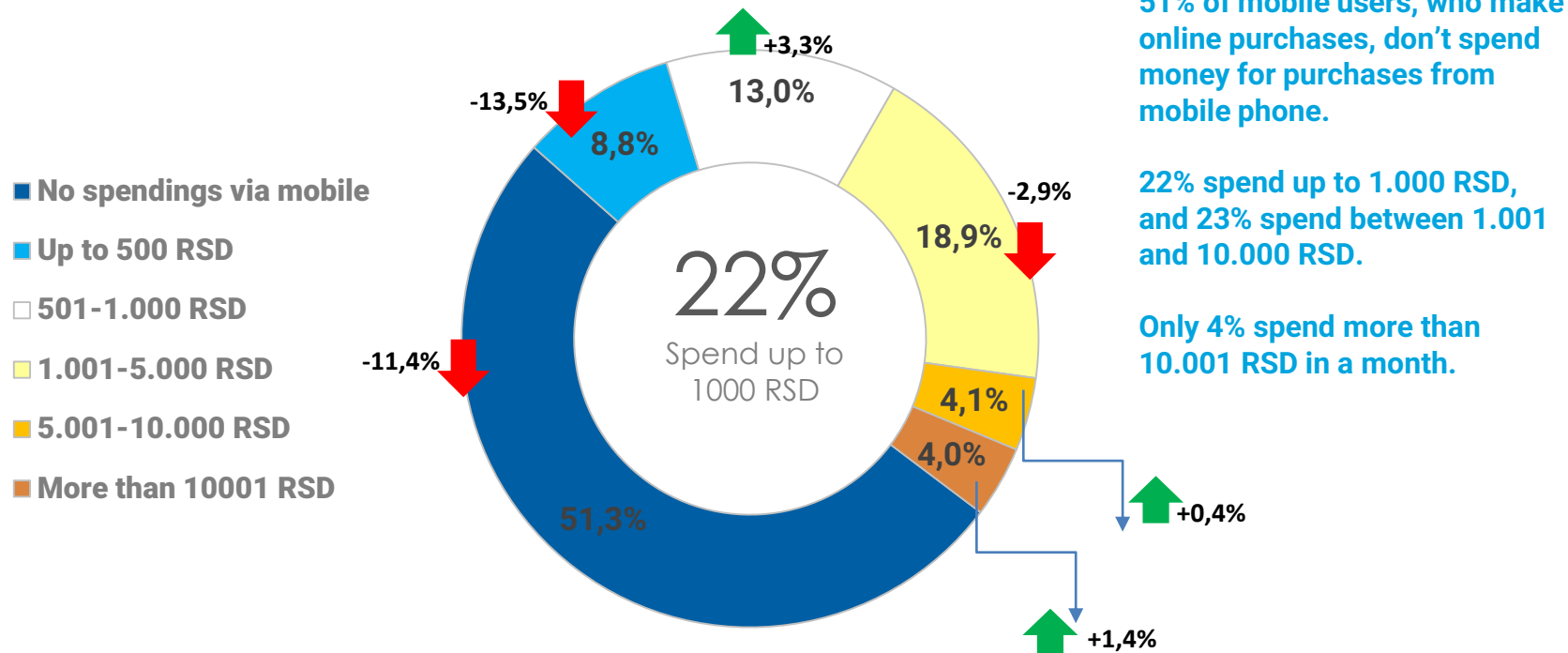


Source: gemiusAdHoc study, October 2017

N=840, weighted data

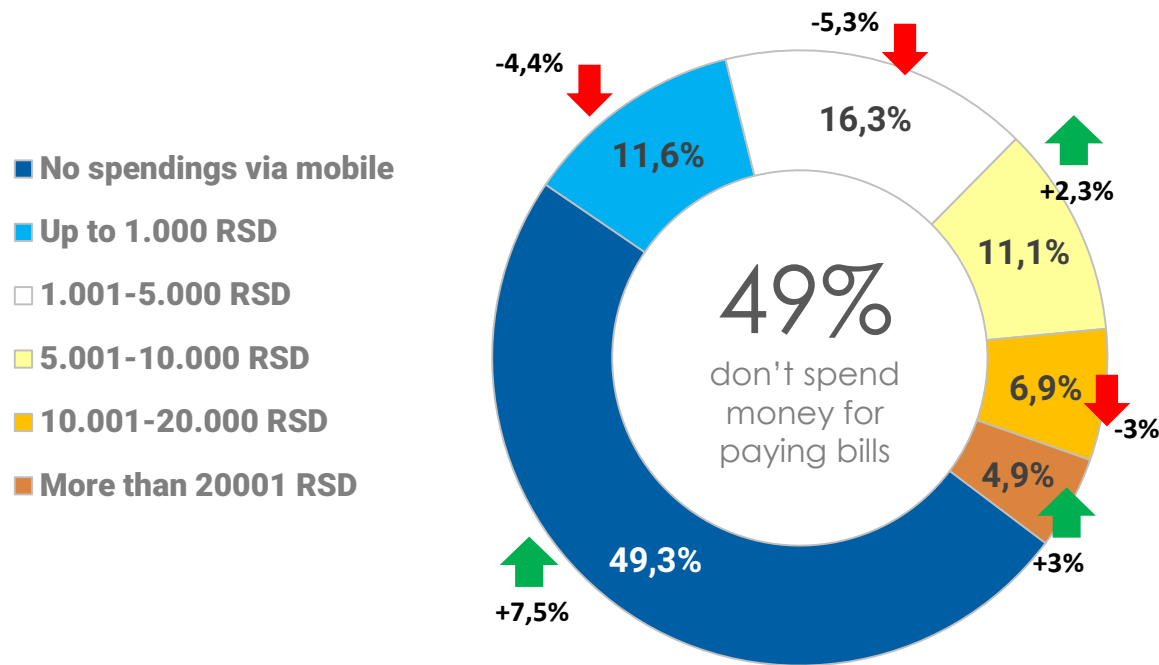
Online purchases: money estimation

How much do you spend in a **month** on purchases made from your mobile phone?



Online payments: money estimation

How much do you spend in a **month** on paying bills from your mobile phone?



49% of mobile users, who make online purchases, don't spend money for paying bills from mobile phone!

16% of those who pay bills online via phone spend in a range from 1.001 to 5.000 RSD

12% spend up to 1.000 RSD.

23% spend more than 5.001 RSD in a month (sum of respondents in 3 categories with more than 5.001 RSD).

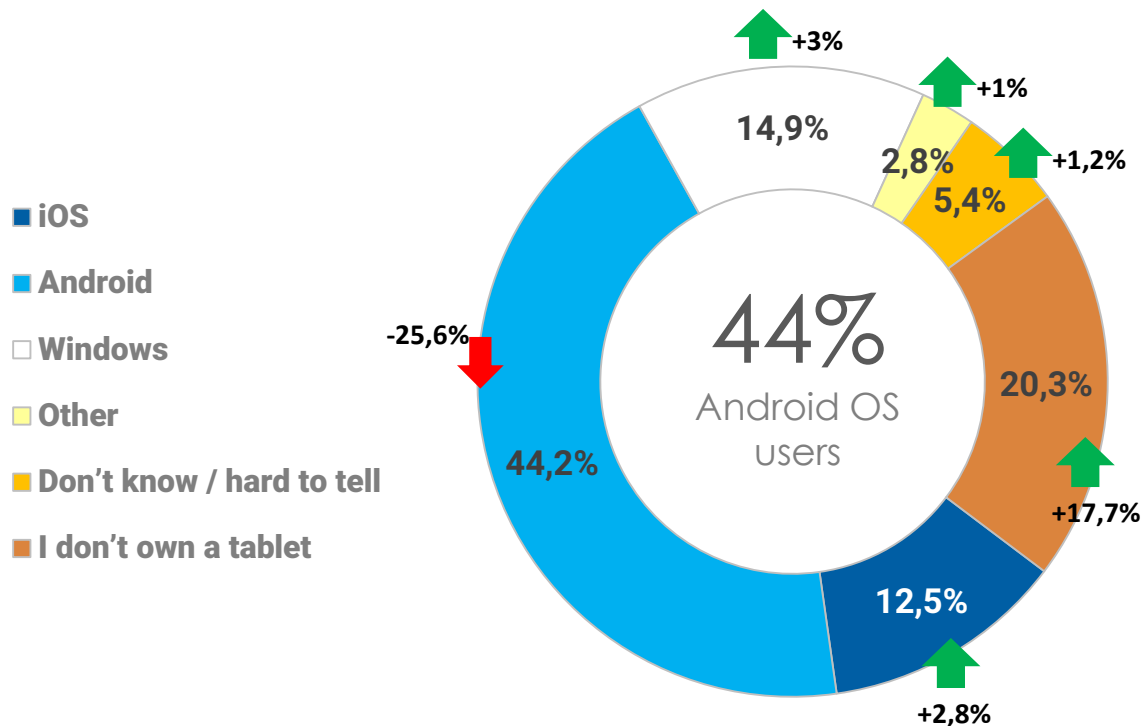


- › **Worth to remember:**
 - › **Android is king** and there's no many signals that anything will change
 - › Number of people who don't spend money through mobile commerce is **decreasing**
 - › Are your e-shop ready for **mobile users**?
 - › In Poland **64%** of users declare to start shopping on smartphone and finish on tablet or laptop. Don't forget about **omnichannel**.

Analysis of tablet users



What operating system tablet do you use?



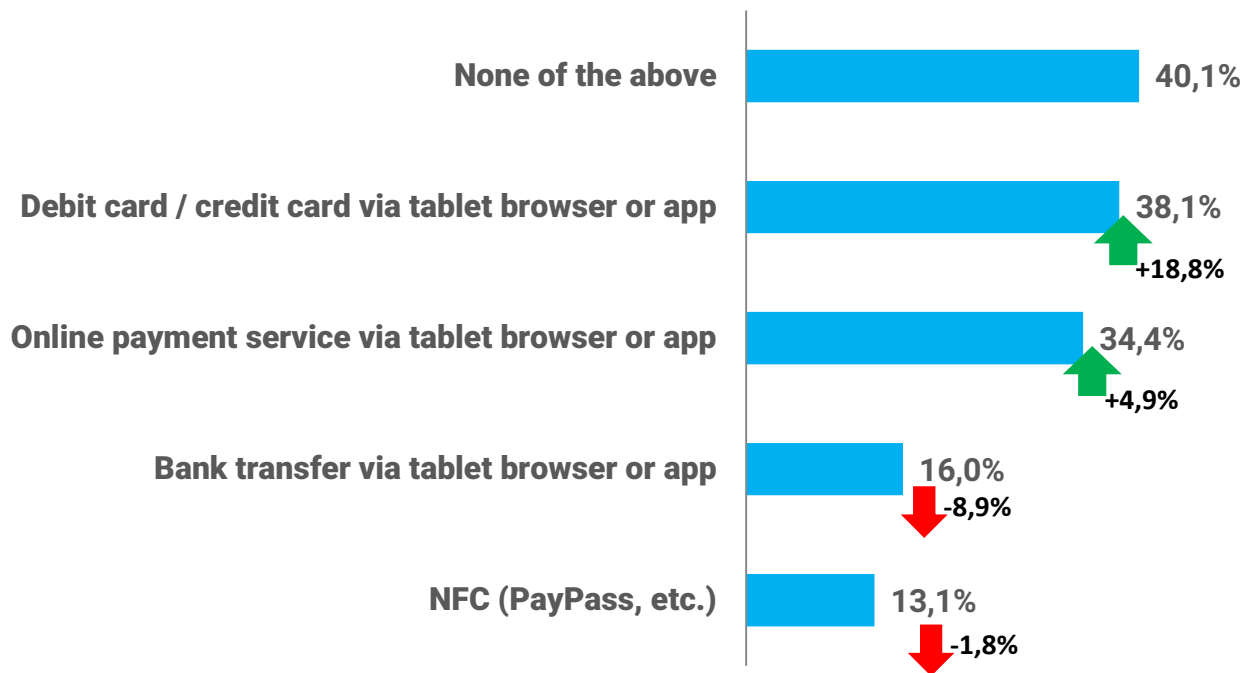
Most of respondents, who own a tablet use Android operating system – 44%.

The share of iOS users is 12,5% and Windows – almost 15%.

5% of respondents, who declare that using a tablet, said that don't know that information.

Tablet payment options

Please mark which of the following payment options you find the most reliable when making online shopping.

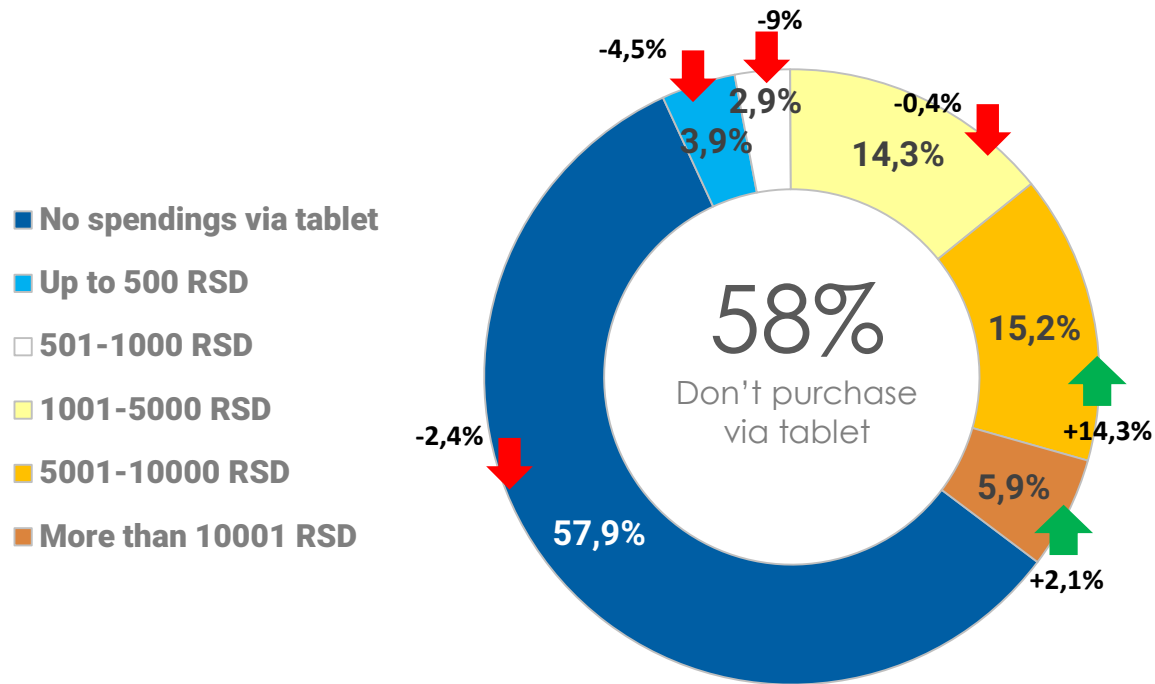


The most comfortable to use payment option via tablet is with debit / credit card via tablet browser or app (38%).

Online payment service via tablet browser or app & bank transfer via tablet browser or app are on 2nd and 3rd position in a payment options ranking.

Online purchases: money estimation

How much do you spend in a **month** on purchases made from your tablet?



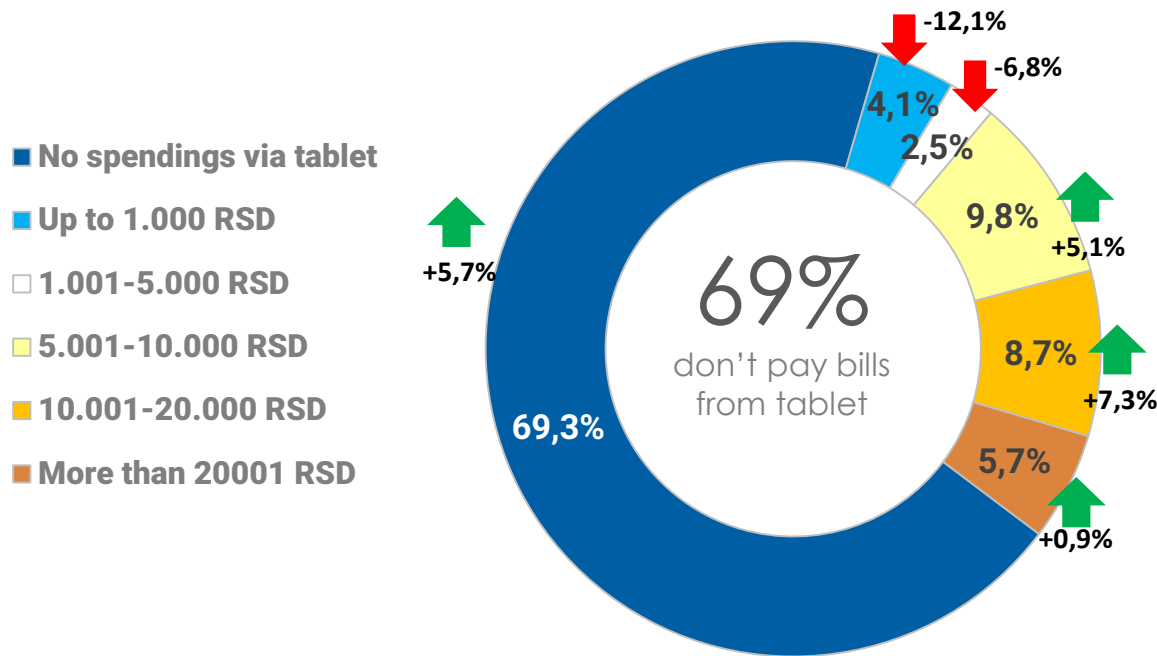
More than a half (58%) of tablet users, who make online purchases, don't spend money for purchases from tablet.

7% spend up to 1.000 RSD and 14% - 1.001-5.000 RSD.

And even 21% spend more than 5.001 RSD in a month.

Online payments: money estimation

How much do you spend in a month on paying bills from your tablet?



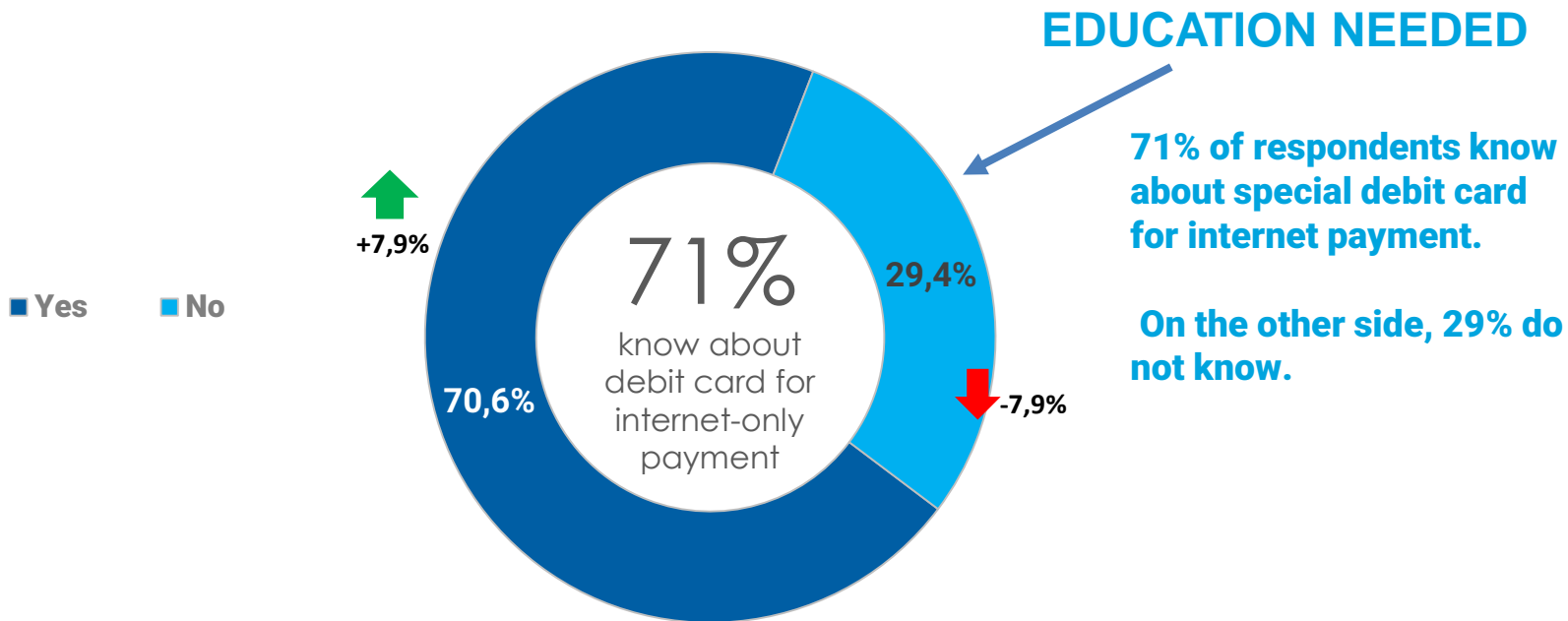
69% of tablet users, who make online purchases, don't spend money for paying bills from tablet.

10% spend in a range between 5.001-10.000 RSD.

5,7% spend more than 20.001 RSD in a month.

Online payments: debit card only for internet payment

Did you know that there are debit cards in domestic banks, which serve exclusively for payment on the Internet?





› Worth to remember:

- › Remember about **youngest** and **oldest** consumers
- › Foreign shops and platforms are much more popular than last year! It's dangerous competition!
- › Older customers expect different approach (meet the expectations, deliver more reliable information)
- › **Lower prices, discounts, delivery costs – counts all together, but don't play most important role separately for educated costumers**





› Worth to remember:

- › Average **shopping cart value is between 1001-5000 RSD** it's great opportunity to increase a value of basket and make customers to do 2nd and 3rd shopping - **what about website analytics (bounce rate, customer journey, traffic source optimization, proper offers for 1st, 2nd and 3rd time buyers?)**
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› Worth to remember:

- › **Olders customers are more used to experiencing product before buying.**
- › **They expect clear and easy path from /home to /thank-you-page**
- › **Are there clear OFFER and CTA on your website? What is the role of your website?**



- › **You want to be found on PC, laptop and MOBILE!**
- › **You want your content to be shared**
- › **You want your photos to sell**
 - **content with relevant images gets 94 more view than content without relevant images**
- › **You want your videos to sell**
 - **video viewers are 1.7 more likely to make a purchase than non-viewers**





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Thank you!

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