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corporate

**Q2 2020**

**QUANTITATIVE SURVEY**

**ONLINE SHOPPING IN SERBIA**

**THE TIME OF EPIDEMIC**





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## METHODOLOGY

CATI (telephone survey)

**Recruitment:** nationally representative quota sample

**Questionnaire:** up to 10 minutes in length



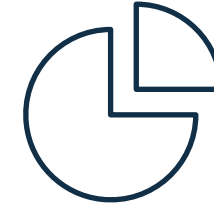
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## TARGET GROUP

Population of the Republic of Serbia

Age: 15+ years

Quotas according to the age, gender, region



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## SAMPLE STRUCTURE

**Sample size:** 1253 respondents

**Coverage:** the sample represents population of the Republic of Serbia by gender, age and regions

# Key findings

- ✓ **The number of online shoppers in Serbia shows a growth of 9% during the second half of March, April and the first half of May this year compared to the period before COVID-19 epidemic.** The number of **online shoppers\* in Serbia reached 43% of the population over 15 years of age.** Additionally 4% of the citizens of Serbia e-shopped with someone's help\*\*.
- ✓ **Clothing and footwear dominate the e-commerce** with 2 out of 3 online shoppers who are purchasing these products. Other product categories lag significantly: close to 30% of online shoppers are purchasing electronic devices and telephones, every fourth is making accommodation reservations, and every fifth orders food delivery, cosmetics, and sports equipment online.
- ✓ **Still only one in ten citizens purchases groceries and household supplies,** and those are mainly more experienced shoppers who buy various products and services online. Nevertheless, this category showed one of the greatest potentials for growth during the first wave of COVID-19 and the state of emergency.
- ✓ Children's products, baby equipment and toys, auto parts and tools, clothing and footwear, drugs, vitamins and over the counter medications also showed potential for growth at the level of the average growth of online shopping in this period.
- ✓ **Almost a third of online shoppers purchase only one category of products, mostly footwear and clothes** (comprising close to 15% of the total number of e-shoppers in Serbia who e-shop only for clothes and nothing more). Others are relatively evenly distributed and buy 2 product categories and 3 to 4 categories (a quarter of e-shoppers each), while every fifth online buyer is experienced and makes diversified purchases of 5 or more product categories.



\*Online payment of utility and other bills is not included

\*\*Someone was shopping for them

# Key findings

- ✓ The main barrier for both to embark in online shopping and to its growth among citizens who already buy electronically is **the inability to touch and try the product**. The growth of online shopping is also hampered by worries about **the delivery of the wrong or damaged product**, and there is room for improvement in the online shopping experience itself in order to catch up with shopping in a brick and mortar stores in a **hedonistic sense**.
- ✓ Citizens who have **not yet had the experience of online shopping** are limited by **difficulties in navigating websites** and hesitate due to concerns of **payment security and privacy of personal data**.
- ✓ Nearly 60% of citizens who haven't shopped online perceive certain advantages in this type of shopping, which indicates the potential of e-commerce for further growth. In addition to **the comfort and ease of ordering** and **the speed of purchase**, an important advantage is the **availability of products that are not available in Serbia**. Significant incentives for online shopping are also **free delivery** and **the possibility of replacing or returning products**.
- ✓ The greatest potential for the growth of online trade is expected to be driven by the population of non-shoppers up to 50 years of age. They respond to free delivery and possible replacement or return of products to a significantly greater extent and attribute more benefits to online shopping in general. Citizens over the age of 50 show less interest in this type of purchase, not only in terms of perceived advantages and incentives, but also in less attentiveness to its disadvantages.
- ✓ About 10% of non-shoppers refuse online shopping in general.



# Key findings

- ✓ **Websites of domestic brands and manufacturers** instill the most trust among online shoppers in Serbia, followed by **sites of world-famous brands and online shopping sites** offering various goods such as **AliExpress or eBay**. Sellers who advertise and offer products through **social media**, as well as **group shopping sites** are the least trusted.
- ✓ **Cash on delivery** is still the main and favored way of paying for online purchases in Serbia for about 80% of both online shoppers and those who did not shop online, and for as many as 88% of young people under 30 years of age. **Payment cards** are popular among almost half of online shoppers.
- ✓ **16% of online shoppers faced problems with online shopping**, most often in the form of delivery of a damaged product, a quality issues of the product, a product that does not match the description or the delivery of the wrong product. **The product was not delivered to every tenth customer who had a problem with the online purchase.**



# RESEARCH FINDINGS

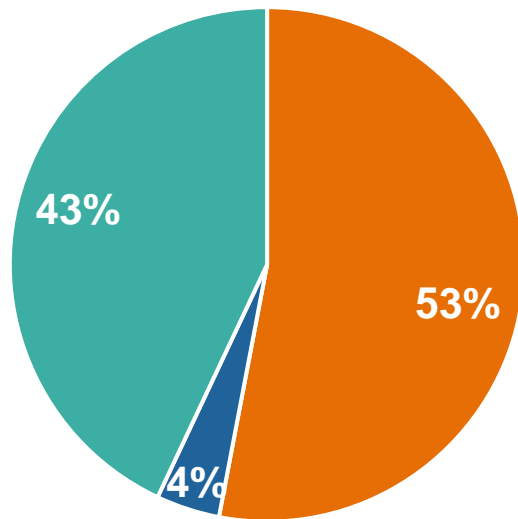


Online shopping in Serbia has reached 43% of citizens over the age of 15. Additionally, 4% of the population of Serbia makes electronic purchases with someone's help (someone makes an online purchase for them).

Clothing and footwear is the dominant e-commerce category with close to 2 out of 3 online shoppers in Serbia who are purchasing these type of products. Nearly 30% of online shoppers is purchasing electronic devices and telephones, every fourth makes accommodation reservations, and one in five orders food delivery, cosmetics, and sports equipment online.

Only one in ten citizens purchases groceries and household supplies through the websites of retailers or online stores.

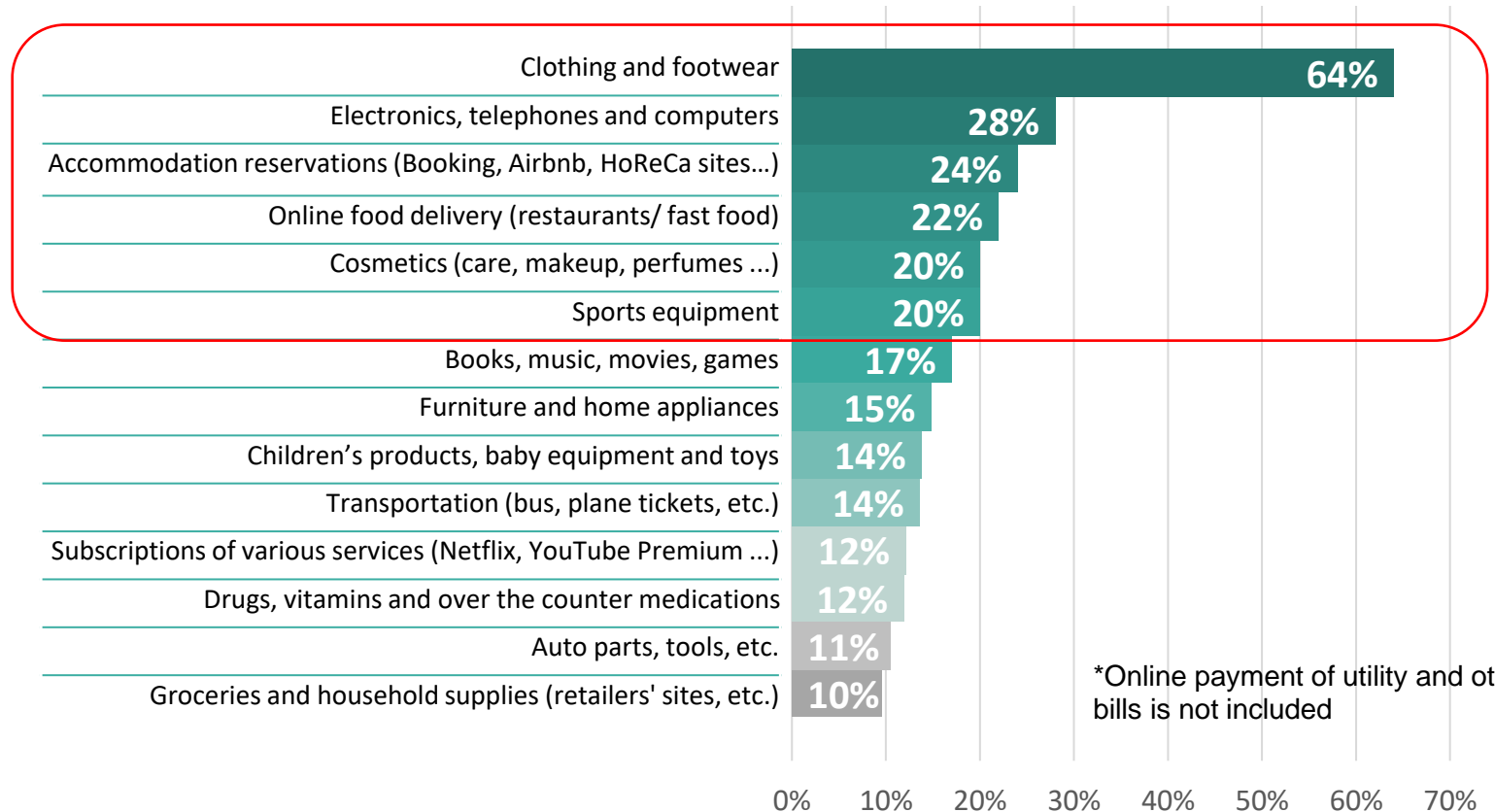
## Have you shopped online?



- No, I didn't shop
- Yes, I shopped
- Someone shopped for me

Base: Total (1253 respondents)

## Top online shopping categories\*



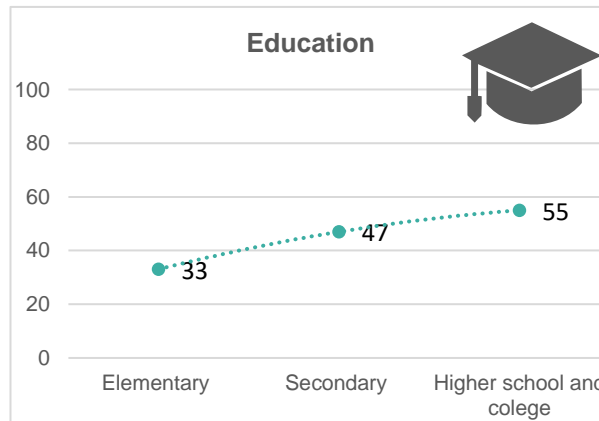
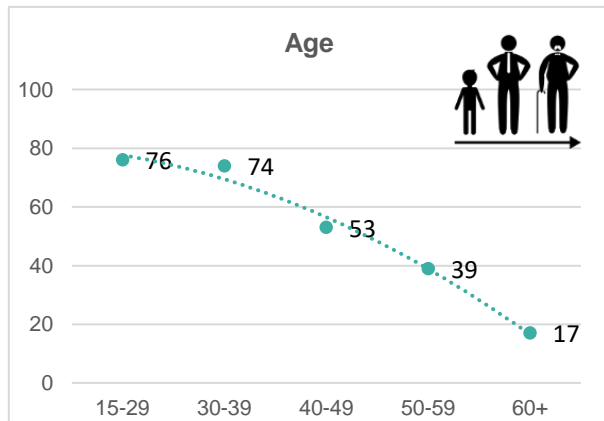
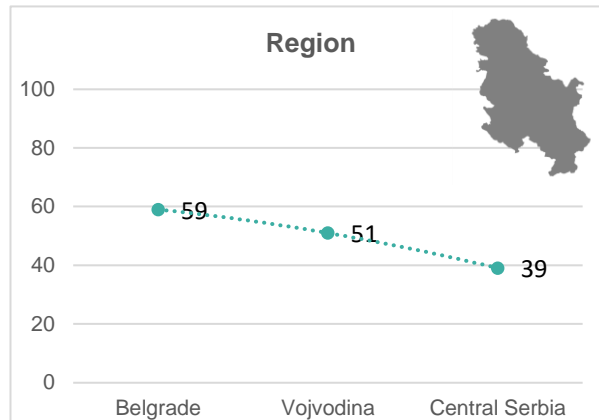
\*Online payment of utility and other bills is not included

Base: Those who shop online either independently or with the help – online shoppers (589 respondents)

In Serbia, men are slightly more involved in online shopping (50% vs. 44% among women). Among those under the age of 39, 3 out of 4 shopped online, while among people under the age of 49 every other citizen shopped online. Belgrade and Vojvodina lead with 59% and 51% of online shoppers among citizens, respectively.

While almost 70% of women online shoppers buy clothes and shoes, and every third purchases cosmetics, men (in addition to the clothes and shoes) also buy electronics (almost 40%), make accommodation reservations (29%), and buy sports equipment (24%).

## Have you shopped online?



## Top online shopping categories

Category	Male (%)	Female (%)
Clothing and footwear	60%	69%
Electronics, telephones and computers	38%	19%
Accommodation reservations	29%	20%
Cosmetics (care, makeup, perfumes...)	8%	33%
Sports equipment	24%	15%
Children's products, baby equipment...	10%	17%
Subscriptions of various services (Netflix, YouTube Premium ...)	16%	8%
Auto parts, tools, etc.	18%	3%



# STRUCTURE OF ONLINE SHOPPING

Nearly a third of e-shoppers buy only one product category through online channel. Their purchase is mostly focused on footwear and clothing (47% of buyers of one category, or about 15% of the total number of e-shoppers in Serbia online purchase exclusively clothes and nothing more). Every tenth buys electronics, and all other categories lag significantly behind. About a quarter of customers purchase 2 product categories, and similar number buys 3 to 4 categories, while every fifth online shopper is experienced and buys 5 or more product categories. More diverse and numerous e-commerce activities are driven by electronics and technology, accommodation reservations and cosmetics, followed by ordering food delivery and sports equipment. The purchase of furniture, household apparel and groceries is done mainly by experienced online shoppers who purchase 5 or more categories.

## Number of categories purchased online

Buyers of 1 category

31%

Buyers of 2 categories

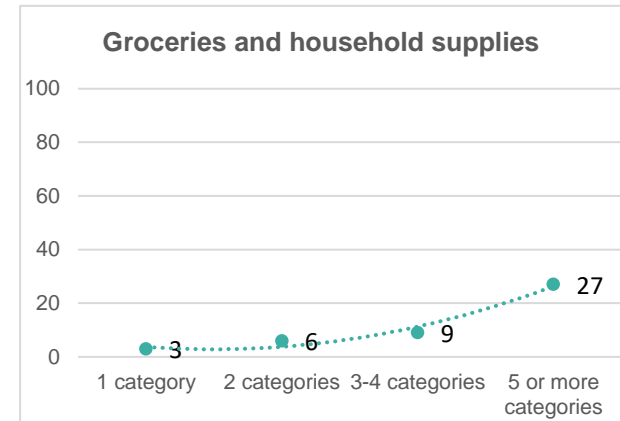
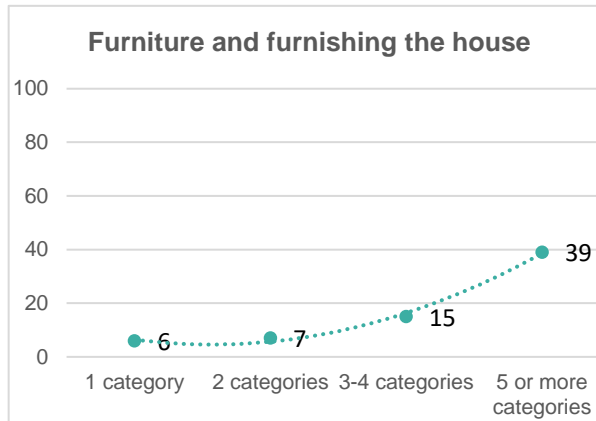
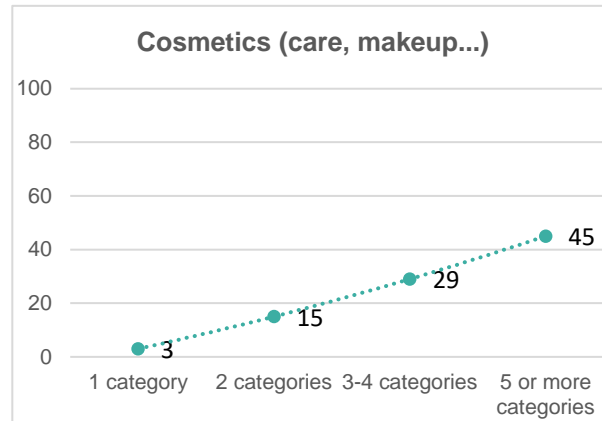
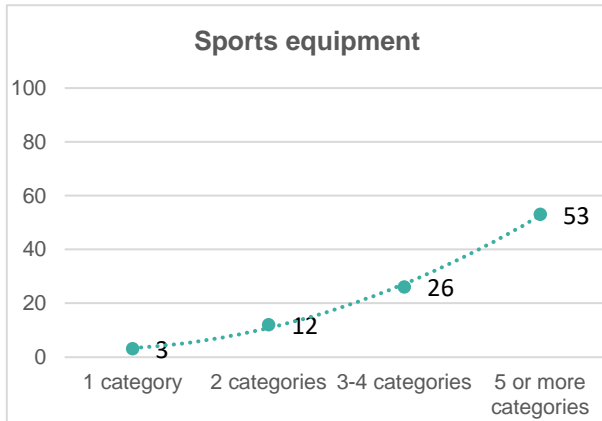
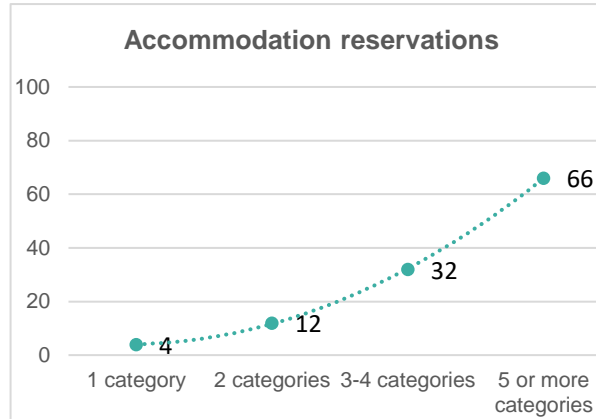
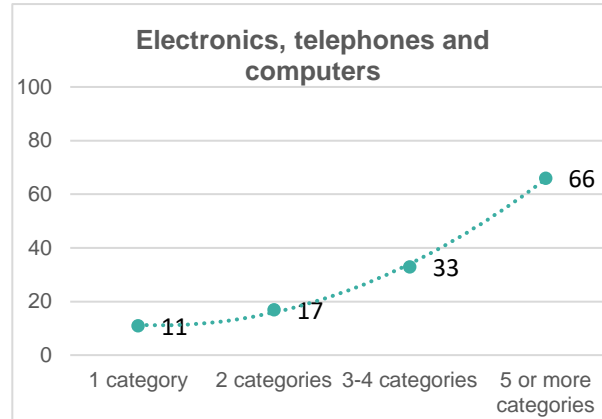
26%

Buyers of 3-4 categories

24%

Buyers of 5+ categories

19%



Online shopping in Serbia shows a growth of 9% during the second half of March, April and the first half of May compared to the period before the epidemics.

The children's products, baby equipment and toys, car parts and tools, groceries and household supplies, clothes and footwear, and drugs, vitamins and over the counter medications show the biggest growth.

Accommodation reservations and transportation showed the lowest potential for online shopping growth during this period.

## Growth of online shopping compared to the period before the epidemic



\*Growth of purchases compared to the period before the epidemic

Base: Total (1253 respondents)

	Customers who shopped online before epidemics	Customers who started shopping online during the epidemic	Growth of the number of shoppers compared to the period before the epidemic
Clothing and footwear	61%	3.4%	+6%
Electronics, telephones and computers	27%	0.8%	+3%
Accommodation reservations	24%	0.0%	0%
Online food delivery	21%	0.5%	+2%
Cosmetics (care, makeup, perfumes...)	20%	0.7%	+3%
Sports equipment	19%	0.8%	+4%
Books, music, movies, games	16%	0.5%	+3%
Furniture and furnishing the house	14%	0.3%	+2%
Children's things, baby equipment, toys	13%	0.9%	+7%
Transportation (bus, plane, etc.)	14%	0.0%	0%
Subscriptions (Netflix...)	12%	0.3%	+3%
Drugs, vitamins, medications...	11%	0.7%	+6%
Auto parts, tools, etc.	10%	0.7%	+7%
Groceries and household supplies	9%	0.6%	+6%

Base: Online shoppers (589 respondents)

The main barrier for both engaging in online shopping and for its growth among citizens who shop electronically is the **inability to touch and try the product** (claims about half of both customers and non-customers).

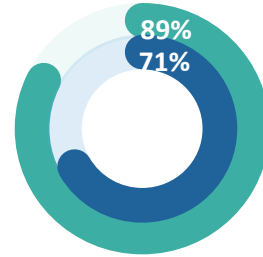
Online shoppers are also greatly **concerned about the delivery of the wrong or damaged product** (about 40%). Every fifth online customer cites the **slow or delayed delivery** as a disadvantage.

Citizens who have **not yet had the experience of online shopping**, point out **difficulties in navigating websites** as online shopping barriers, in addition to **the delivery of the wrong or damaged product**. They are also concerned about the **security of payments** and **privacy of personal data** (about 20% each).

For about a fifth of both online shoppers and non-shoppers, the disadvantage is **the online shopping experience** itself, which needs to be improved to **hedonistically match shopping in regular stores**.

## What are the disadvantages of online shopping?

The citizens who cite disadvantages of online shopping



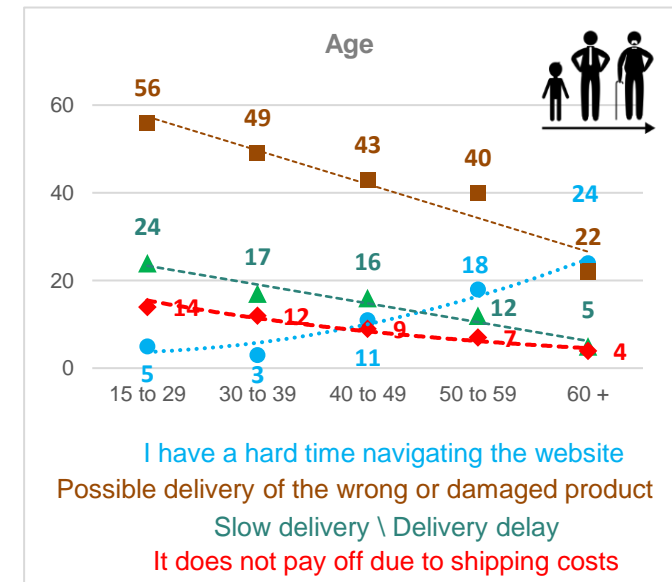
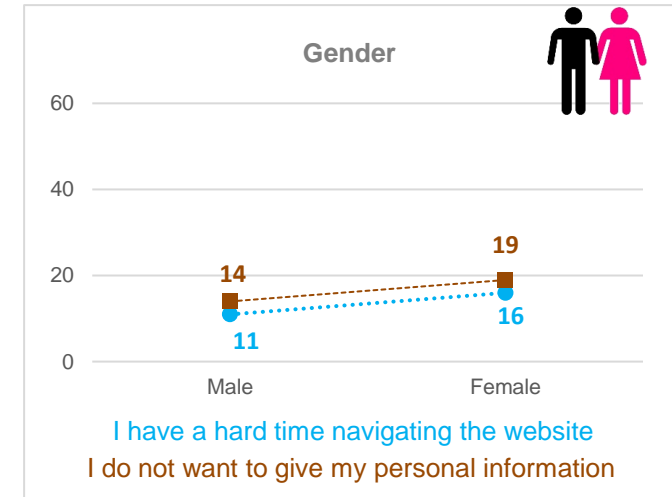
Online shoppers  
Those who do not shop online



\* Indicates statistically significant differences between shoppers and non-shoppers

Base: Online shoppers (589 respondents), Those who do not shop online (664); Multiple answers

In %



Bases: Male (604 respondents), Female (649), 15 to 29 yr. (244), 30 to 39 yr. (202), 40 to 49 yr. (203), 50 to 59 yr. (199), 60+ yr. (405)

Nearly 60% of citizens who have not had the experience with online shopping perceive certain advantages of this shopping channel, which indicates the potential of e-commerce growth in this target market.

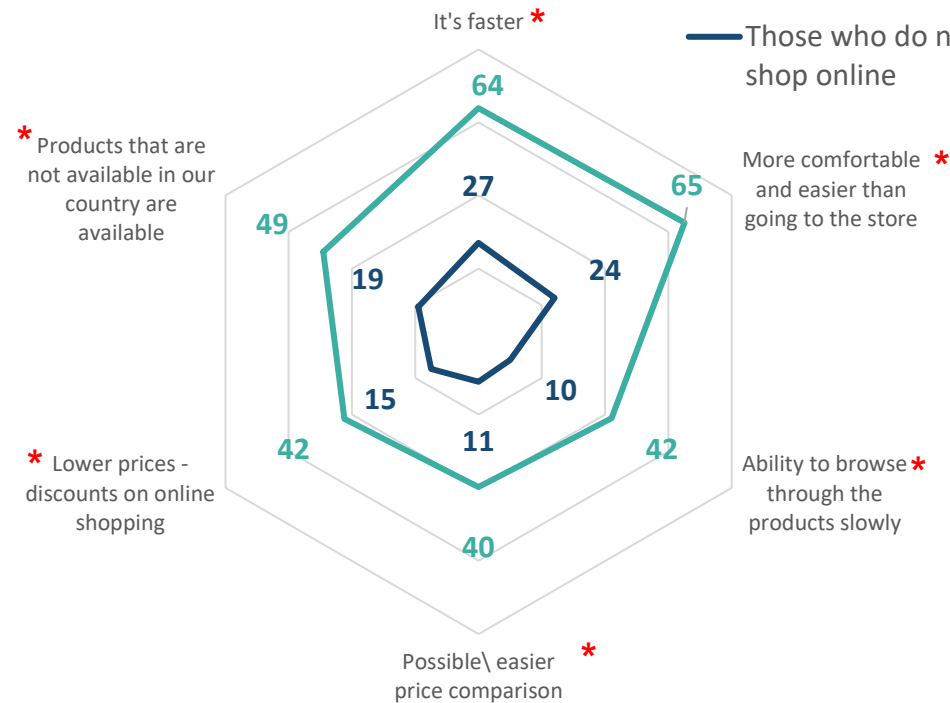
Still, online shoppers cite significantly more benefits of online purchase than non-shoppers, averaging 3.0 vs. 1.1.

The most significant advantages of online shopping for both online shoppers and non-shoppers are **comfort and ease of ordering** compared to going to the store (65% shoppers vs. 27% non-shoppers), **speed of purchase** (64% shoppers vs. 27% non-shoppers), as well as **the availability of products that are not available in Serbia** (49% shoppers vs. 19% non-shoppers).

There is a weak awareness among non-buyers about the possibility of browsing through the products without haste and comparing prices in online shopping (mentioned as advantages by only one in ten). Also, only 15% of non-buyers cite lower prices and discounts of online shopping as an advantage.

## What are the advantages of online shopping?

The citizens who cite advantages of online shopping



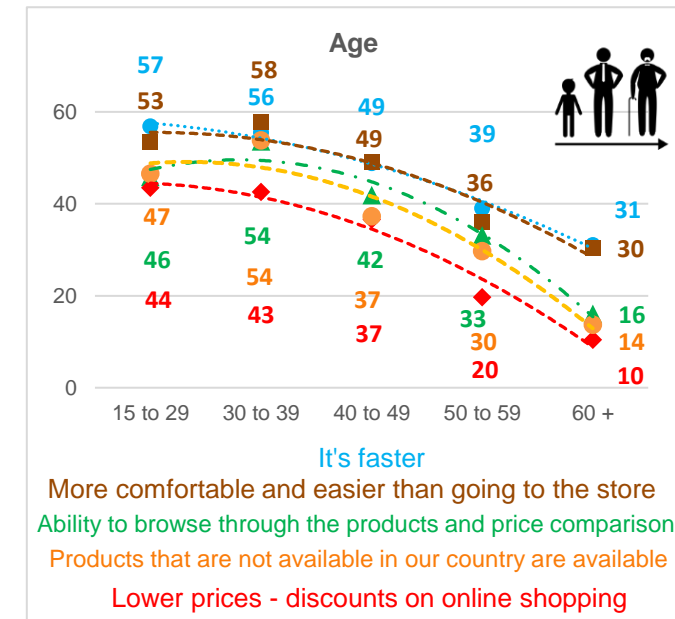
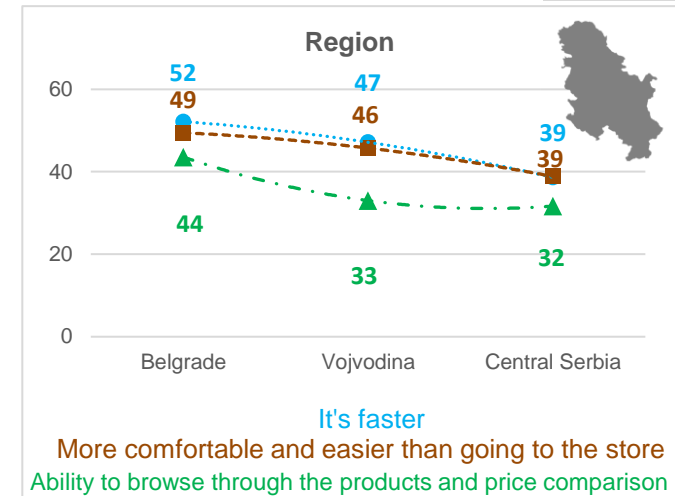
\* Products that are not available in our country are available

\* Lower prices - discounts on online shopping

\* Indicates statistically significant differences between shoppers and non-shoppers

Base: Online shoppers (589 respondents), Those who do not shop online (664); Multiple answers

In %



Bases: Belgrade (301), Vojvodina (333), C. Serbia (619), 15 to 29 yr. (244), 30 to 39 yr. (202), 40 to 49 yr. (203), 50 to 59 yr. (199), 60+ yr (405)

## What would encourage you to shop online (more often)?

The citizens who cite incentives for online shopping



\* Indicates statistically significant differences between shoppers and non-shoppers

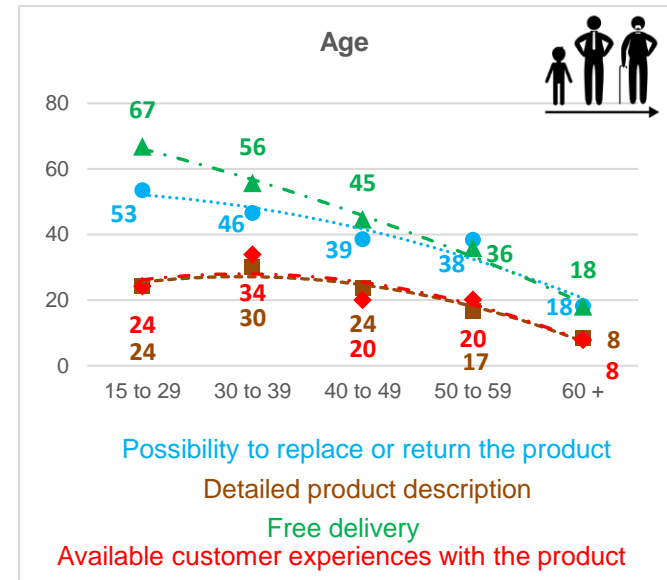
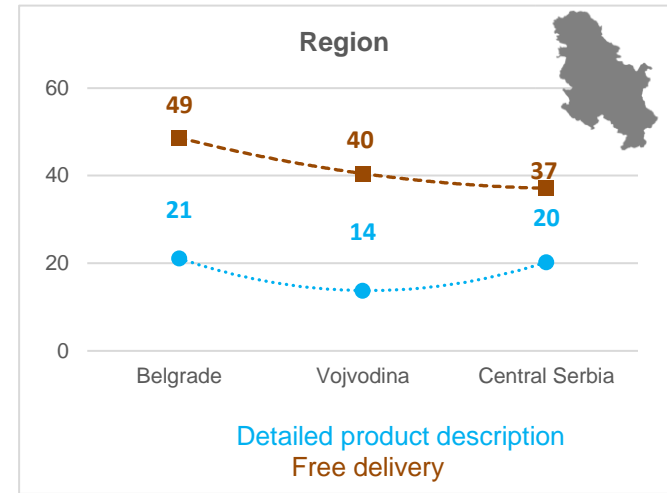
Base: Online shoppers (589 respondents), Those who do not shop online (664); Multiple answers

About 40% of non-shoppers perceive incentives for online shopping. The key are **free shipping** and **possibility of replacing or returning the products** (about 25%), and to a lesser extent customer ratings and comments and detailed product descriptions (about 12%).

**Free delivery** (61%) and then the possibility of replacing or returning products (49%) would contribute to the further popularization and increase in the volume of online trade among shoppers.

User experiences with the product ("reviews") and a detailed description of the product would be motives to increase online shopping for close to 30% of shoppers.

In %



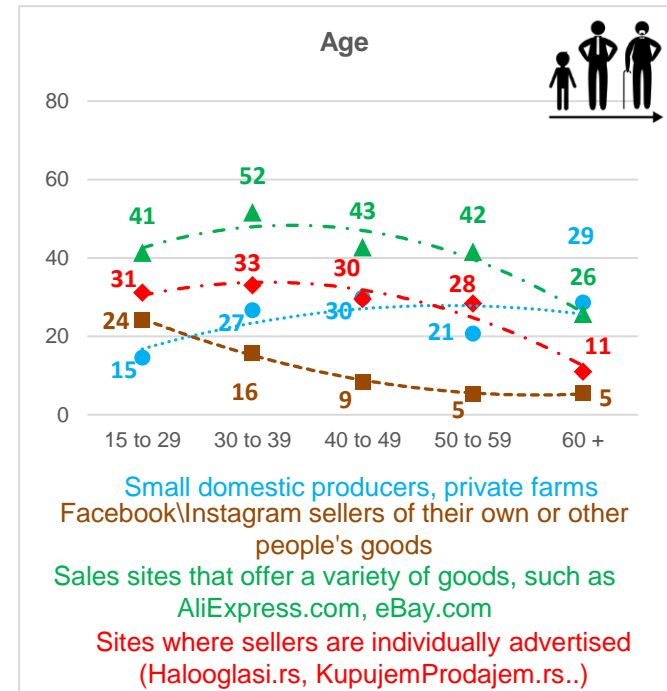
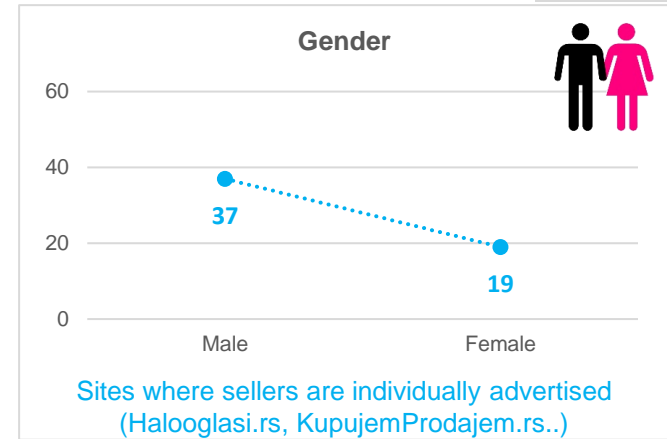
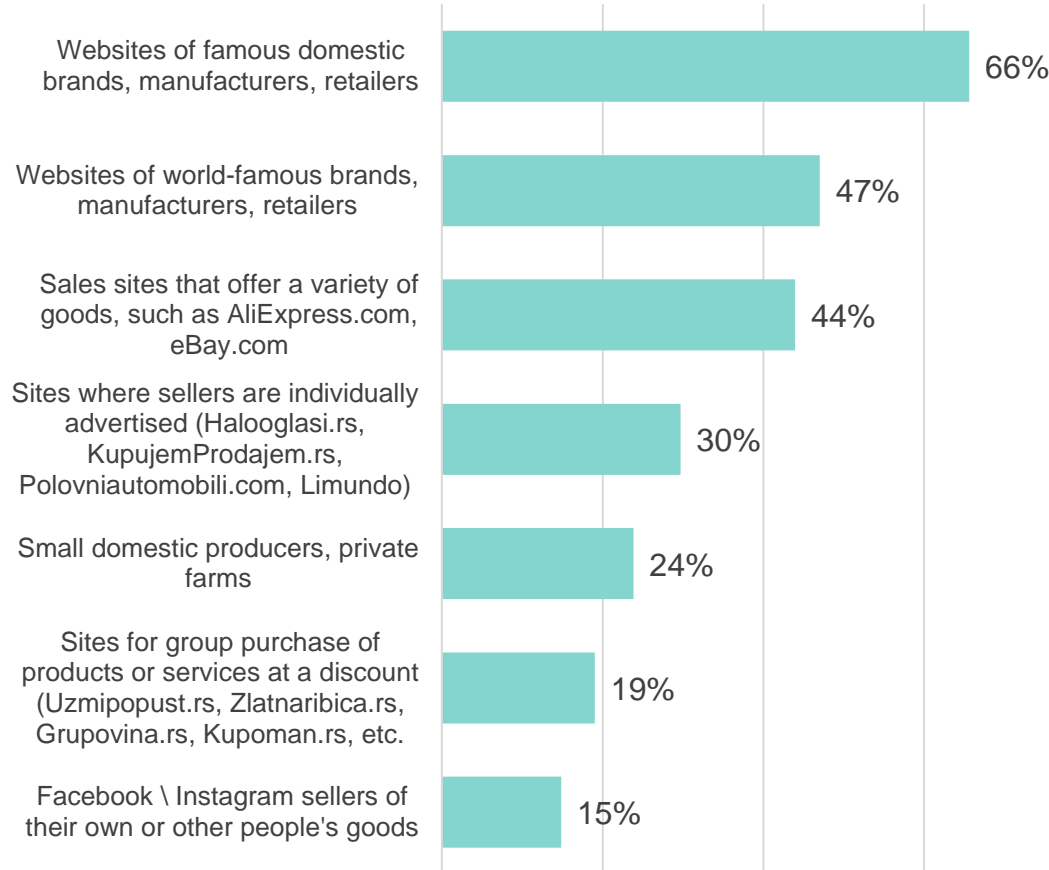
Bases: Belgrade (301), Vojvodina (333), C. Serbia (619), 15 to 29 yr. (244), 30 to 39 yr. (202), 40 to 49 yr. (203), 50 to 59 yr. (199), 60+ yr (405)

**Sites of domestic brands and manufacturers** instill the most trust – to 2/3 of online shoppers.

About 45% of online buyers trust the sites of **world-famous brands and online shopping sites offering various goods such as AliExpress or eBay**.

Sellers who advertise and offer products through **social media**, as well as **group shopping sites** are the least trusted (between 15% and 20%).

## Which online stores/retailers do you trust the most?



Base: Online shoppers (589 respondents), Multiple answers

Bases: Male (604 respondents), Female (649), 15 to 29 yr. (244), 30 to 39 yr. (202), 40 to 49 yr. (203), 50 to 59 yr. (199), 60+ yr. (405)

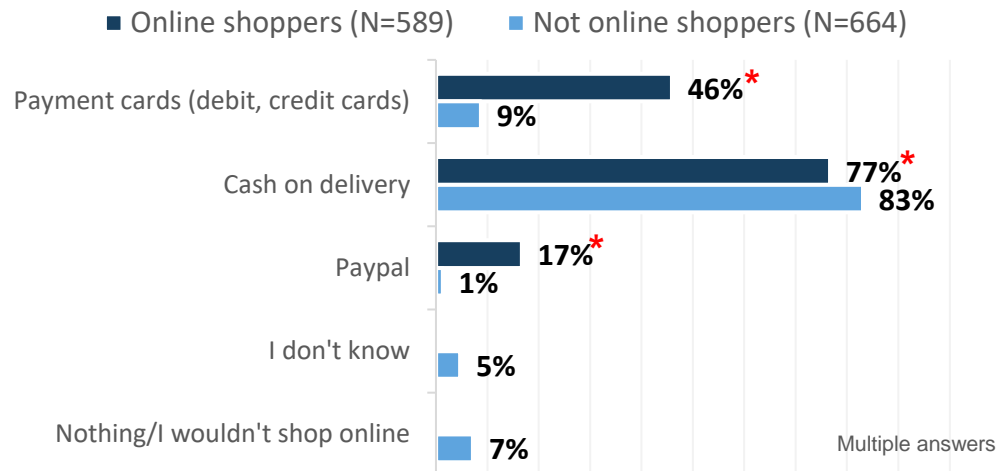
**Cash on delivery** is the preferred way to pay for online purchases in Serbia, both among online shoppers and among those who have not yet had experience with this type of purchase.

**Online shoppers** are more likely to choose **payment cards** and **Paypal** than non-shoppers, while about 10% of non-shoppers refuse online shopping in general.

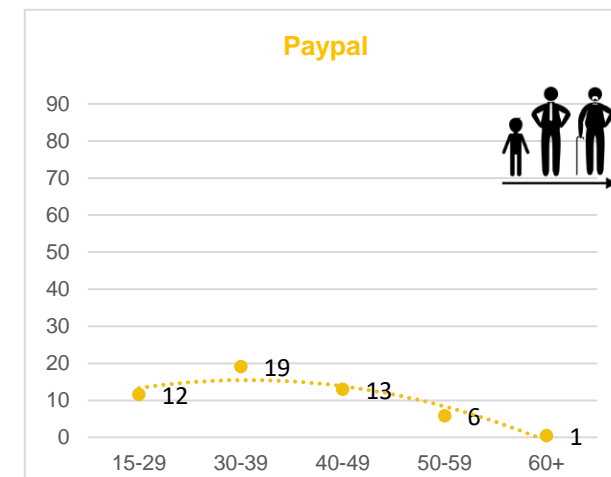
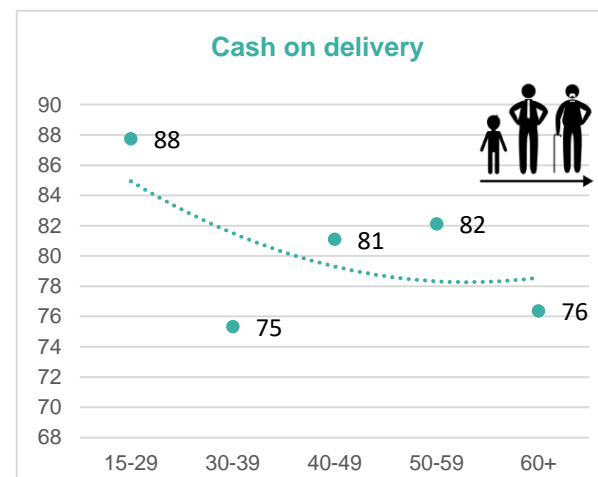
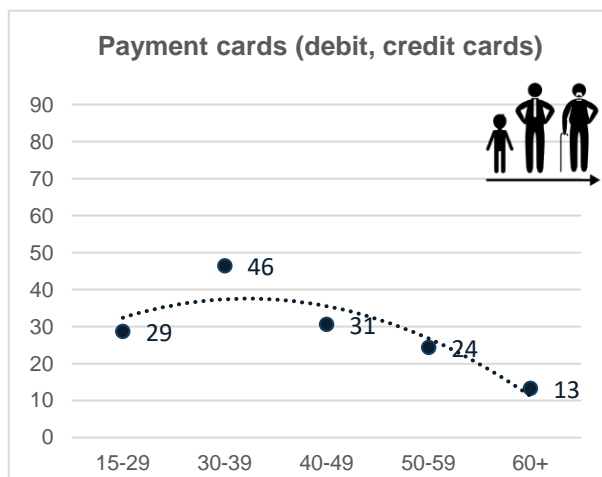
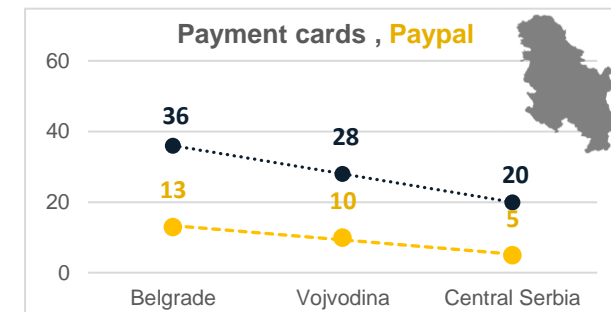
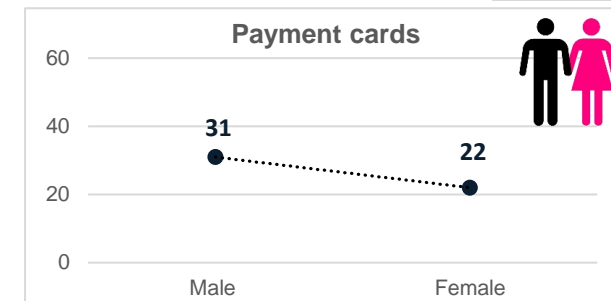
These payment methods are also significantly more often the preferred option among the residents of **Belgrade and Vojvodina** compared to the residents of Central Serbia.

**Payment cards** are the most popular among people **30-39 years of age**. This age group also to some extent prefers Paypal over people over the age of 50. **Cash** is the favorite option for paying for online shopping for the youngest, **15-29 years old**, while it is the least preferred for people between 30-39 years old.

## Which payment method would you choose while shopping online?



In %



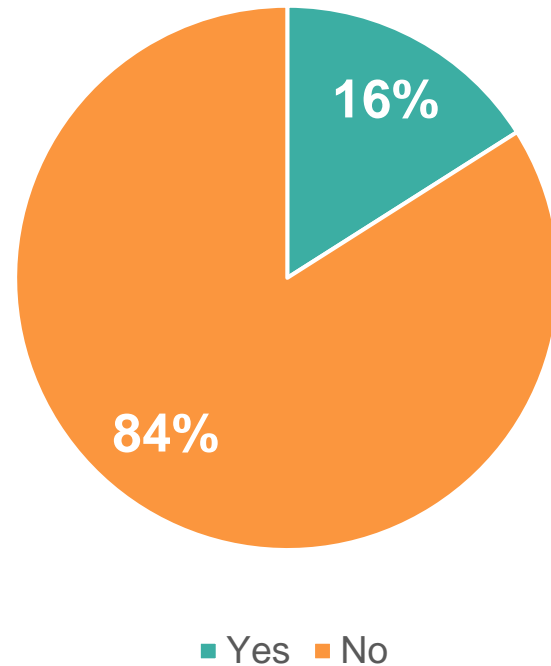
In %

Slightly more than 8 out of 10 shoppers did not experience any problems while shopping online.

Among online shoppers who had problems with e-shopping, every fourth experienced a **delivery of a damaged or poor-quality product**, and one in five experienced a **delivery of a product that did not match the description or delivery of the wrong product**.

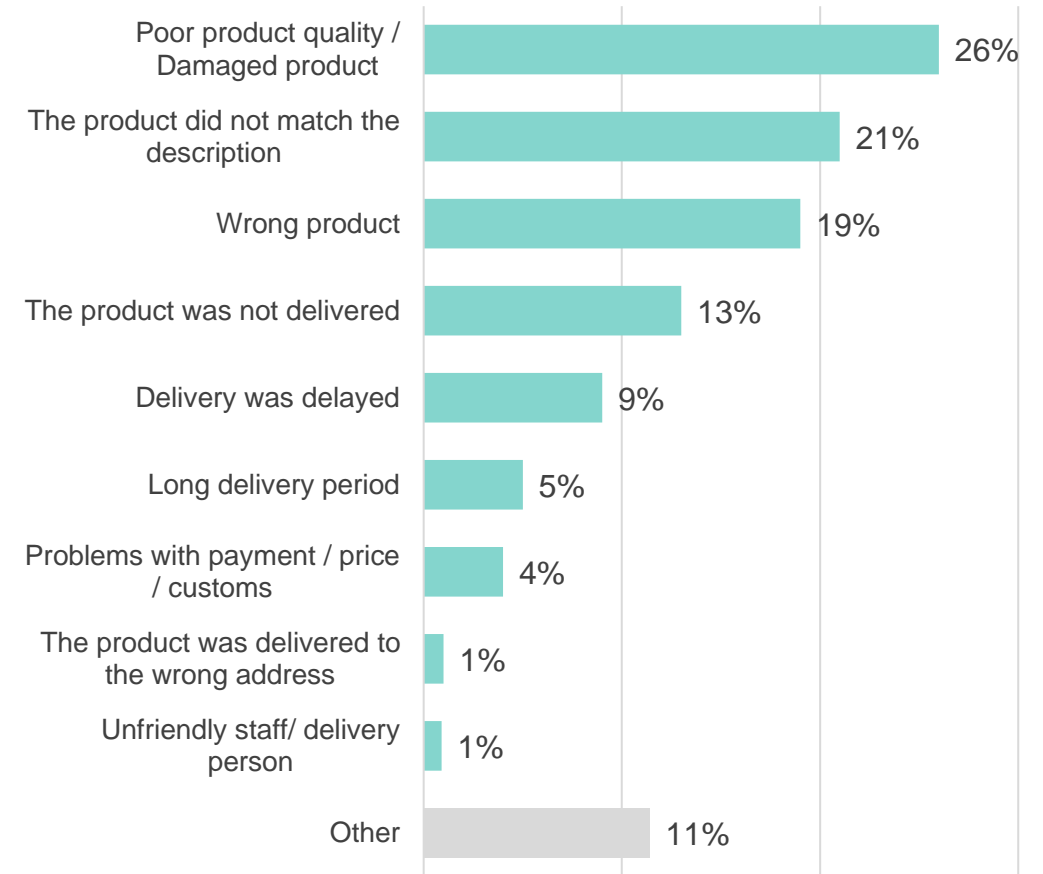
**The product was not delivered** to every tenth shopper who had a problem with online shopping. In the similar number of problematic purchases delivery was delayed.

## Have you ever had any problems when shopping on a domestic or foreign site?



Base: Online shoppers (589 respondents)

## What problems did you have?



Base: Those who experienced a problem while shopping online (104 respondents)



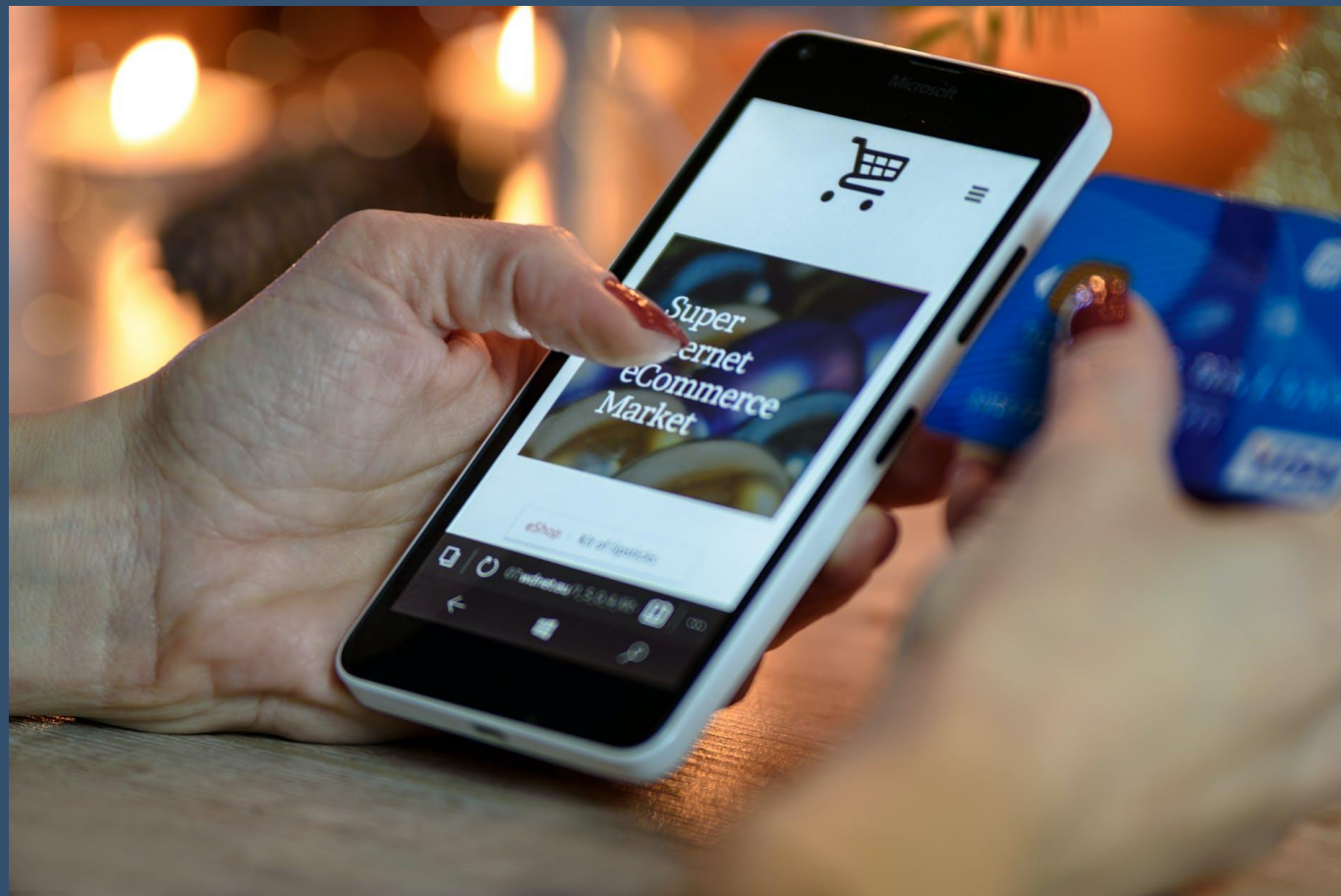
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# THANK YOU FOR YOUR ATTENTION



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