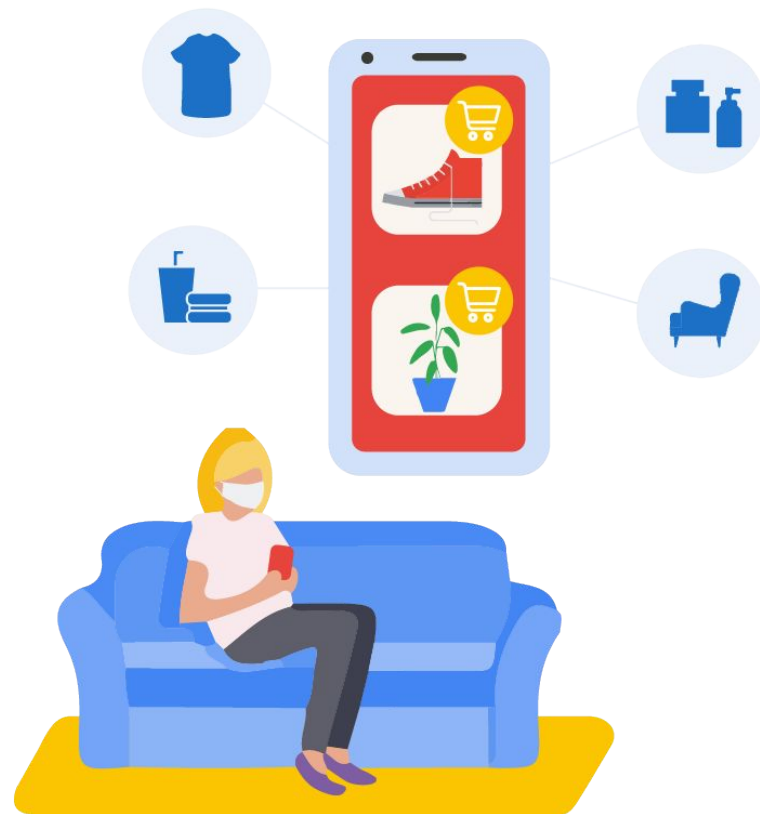


Smart Shopper 2021

Shopping behaviour
in times of COVID-19

Romania



Romanian consumers have a significantly increased preference for online shopping in 2021

Impact of Covid-19 period
on **claimed** shopping habits
(online or offline)



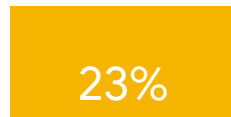
Significantly/tend to
buy more **online**



Significantly/tend to
buy more **offline**



2021



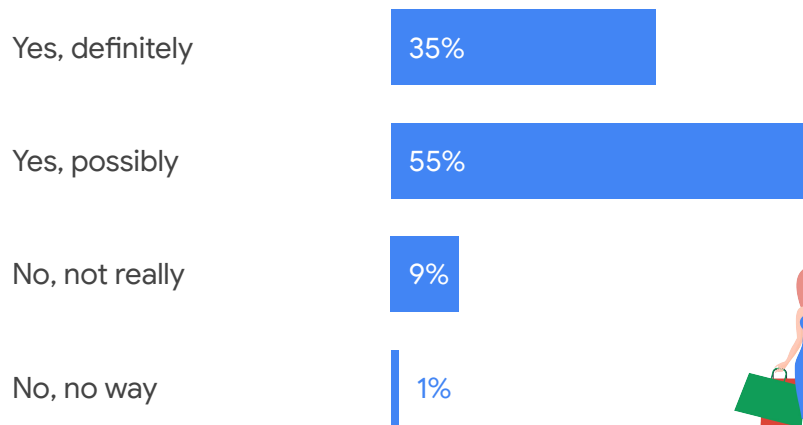
2021

Source: Smart Shopper Research. Google, Cint (2021) / Kantar (2020+2019), base 2021: all product buyers of CE, Home, Fashion n=702, Q39_A: How has your buying behaviour changed since restrictions were imposed by the Covid-19 pandemic?

Answers categories are: Always buy offline / buy significantly more online than offline / tend to buy more online than offline / tend to buy more offline than online / buy significantly more offline than online / buying behaviour has not changed / always buy online.

The majority of Romanian consumers believe that they will maintain the changed shopping behaviour post COVID times

Sustainability of behaviour
change after COVID times -
turned to online



90%

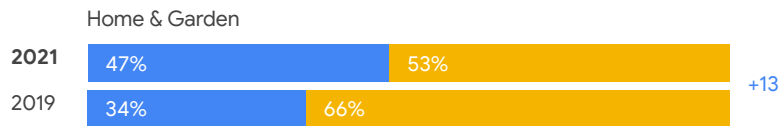
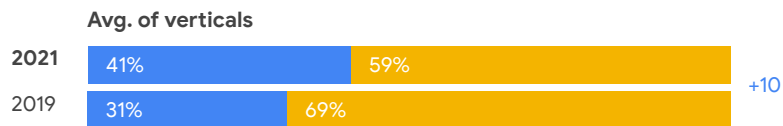
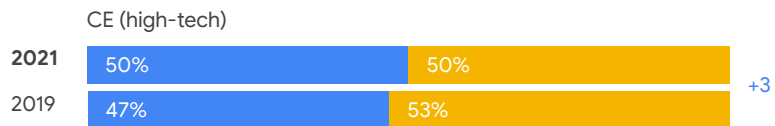
believe they will stick to their
changed purchase behavior



Online purchases increased across all verticals, especially in Home & Garden and Fashion

Purchase Channel, **most recent purchase**

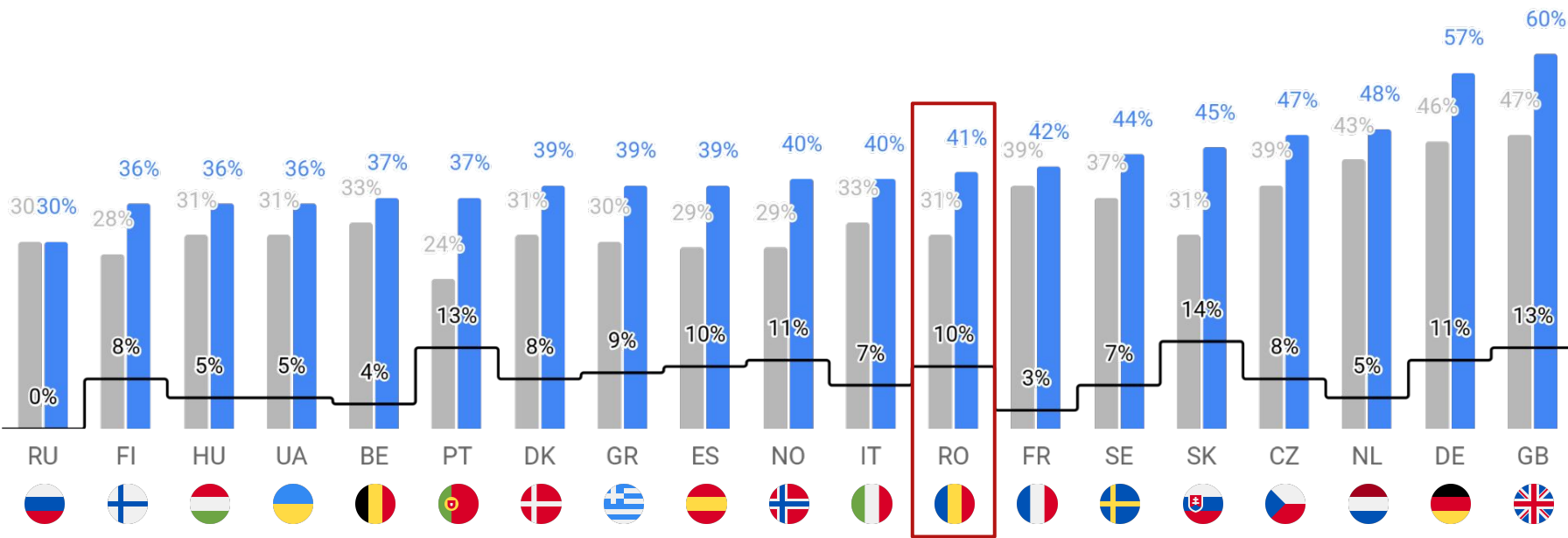
● Online ● Offline



Even though in June retail restrictions were mostly not in place anymore for long-term goods, eComm has increased vs. 2019

● 2019 ● 2021 — pp increase since 2019

Purchase Channel, **most recent purchase was online**

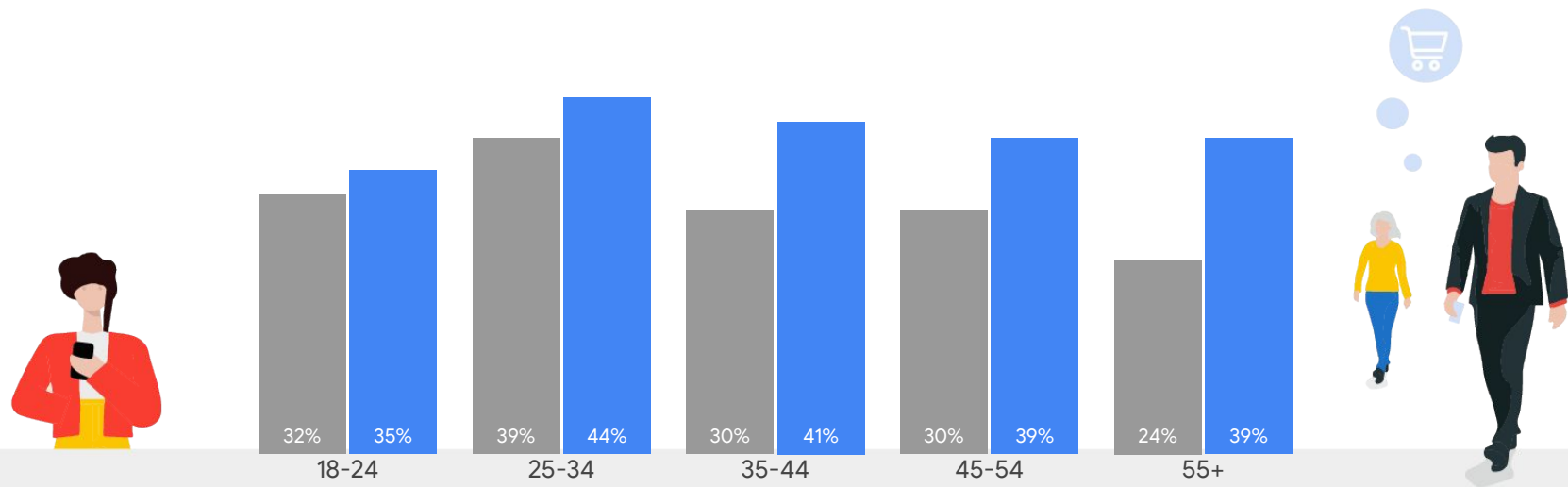


Source: Smart Shopper Research. Google, Cint (2021) / Kantar (2020+2019), base 2019/2020/2021: all product buyers n=79027/30809/65934, BE n=1134/0/1151, DK n=1155/0/1510, FI n=1114/0/1459, NL n=1031/1047/1133, NO n=810/0/1545, SE n=1077/1078/1487, CZ n=995/0/1125, GR n=847/0/1115, HU n=1005/0/1115, RO n=1139/0/1147, SK n=1005/0/1118, UA n=808/0/1176, RU n=885/811/890, TR n=821/798/925, ZA n=685/757/889, FR n=824/0/812, IT n=930/874/869, PT n=818/0/826, ES n=814/0/853, GB n=524/589/789, DE n=658/606/787, AE n=931/830/914, SA n=935/858/923, Q1: Where did you make your last purchase?

The e-commerce share increased across all age groups in 2021, but especially for 35+

Product Purchased Online -
age groups

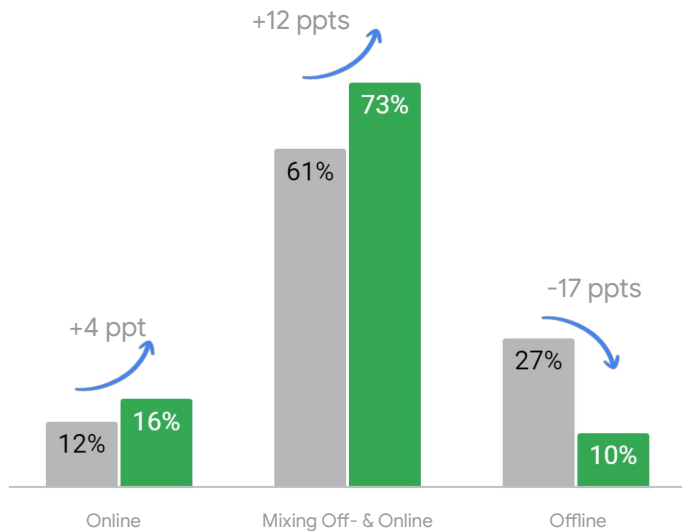
● 2019 ● 2021



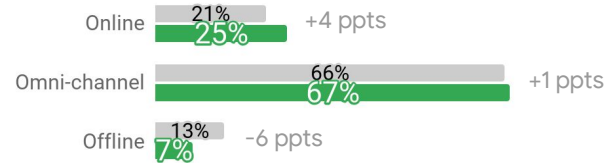
Source: Smart Shopper Research. Google, Cint (2021) / Kantar (2020+2019), base 2021/2019: all product buyers of CE, Home, Fashion n=465/360, 18-24 n=135/150, 25-34 n=361/278, 35-44 n=299/307, 45-54 n=199/214, 55+ n=145/199, Q1: Where did you make your last purchase?

The importance of online in purchasing journeys has increased, especially with the growth of Omni-channel preference

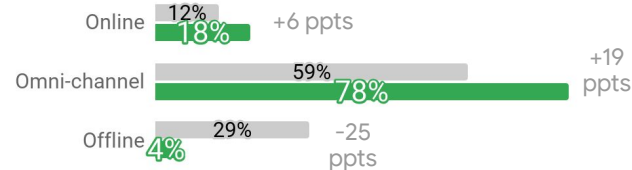
Percentage of people using different channels for their purchases



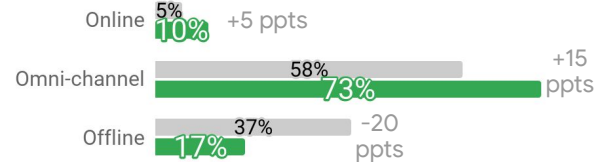
CE (high-tech)



Home & Garden



Fashion

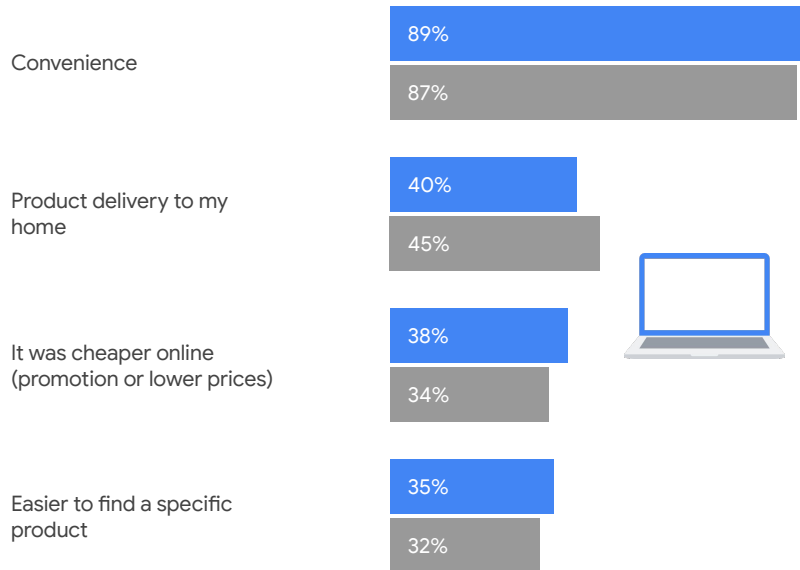


Source: Smart Shopper Research, Google, Cint (2021) / Kantar (2020+2019), base 2021/2019: all product buyers of CE, Home, Fashion n=1049/1147, CE n=273/354, Home n=326/360, Fashion n=450/433, Q18: How frequently do you buy this category online, if at all? channel-agnostic buyers have no clear preference for online or offline purchase and choose their shopping channel by shopping occasion, *channel agnostic = shoppers who buy offline as well as online and aren't fully set on one channel

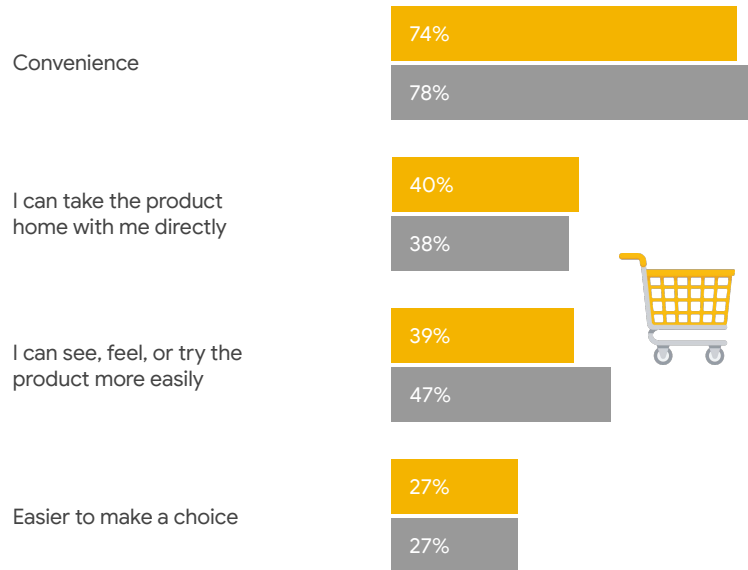
Convenience and home delivery are main reasons for choosing online, convenience and taking home for choosing offline

● 2021 ● 2019

Drivers of **online** purchase



Drivers of **offline** purchase



Covid-19 related issues affect the in-store shopping experience, also increasing the frequency of other pain points

2021 2019

Buyers with an issue or pain point while shopping offline (Ranked by average of verticals, not shown*)



CE (high-tech)

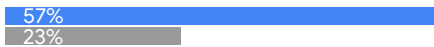


Home & Garden

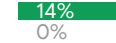
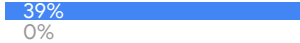


Fashion

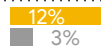
Aggregation: Share of buyers with an issue or pain point



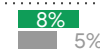
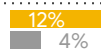
Aggregation: COVID-related issues**



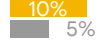
I couldn't find the product for my needs quickly



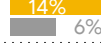
I didn't have time to do sufficient product research



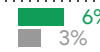
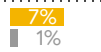
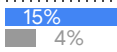
I needed support and couldn't find staff



The product I wanted wasn't available



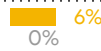
I wanted to look online for information while in store but didn't have access***



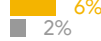
The delivery period were longer than usual



I could not find out if the store has opened during the COVID lockdown



Check out took too long / lines at check out



Source: Smart Shopper Research. Google, Cint (2021) / Kantar (2020+2019), base 2021/2019: all product buyers of CE, Home, Fashion n=668/788, CE n=142/189, Home n=183/239, Fashion n=343/360, Q4_3: Which of these situations did you experience during your purchase, if any?

** Covid-related items: see next slide, *Only top 4 pain points shown (ranked by average of verticals 2021)

*** No WiFi or info terminal provided

Main **online** pain points are missing reviews, registration issues (for CE) and payment methods (for Fashion)

Buyers with an issue or pain point while shopping online (Ranked by average of verticals, not shown*)

2021 2019



CE (high-tech)



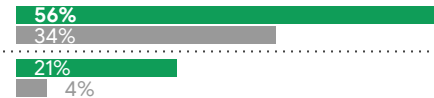
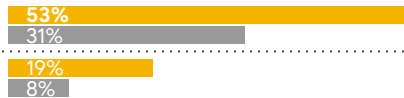
Home & Garden



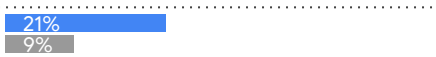
Fashion

Aggregation: Share of buyers with an issue or pain point

Independent product reviews were hard to find



I couldn't buy without registering or without logging in



My preferred payment method was not available



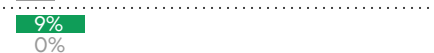
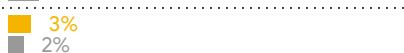
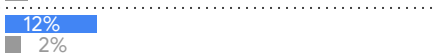
I didn't have time to do sufficient product research



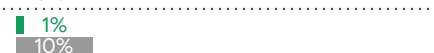
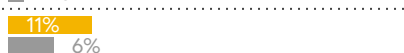
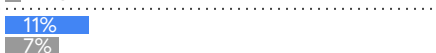
I couldn't find sufficient information on the product



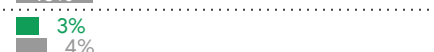
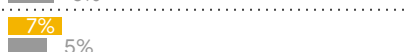
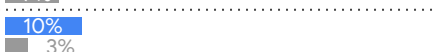
I needed support and couldn't contact anyone



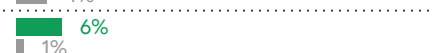
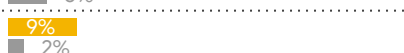
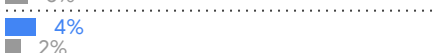
The product I wanted wasn't available



Delivery fees or options weren't clear enough



I couldn't find the product for my needs quickly



Source: Smart Shopper Research, Google, Cint (2021) / Kantar (2020+2019), base 2021/2019: all product buyers of CE, Home, Fashion n=454/360, CE n=143/165, Home n=165/121, Fashion n=146/74, Q4_2: Which of these situations did you experience during your purchase, if any?

*Only top 5 pain points shown (ranked by average of verticals 2021)

Mobile **product research** on very high level and increasing further across categories

Smartphone used to do product research

●●●● 2021 ● 2019



Avg. of verticals



CE (high-tech)



Home & Garden



Fashion

73%

90%

84%

56%

61%

74%

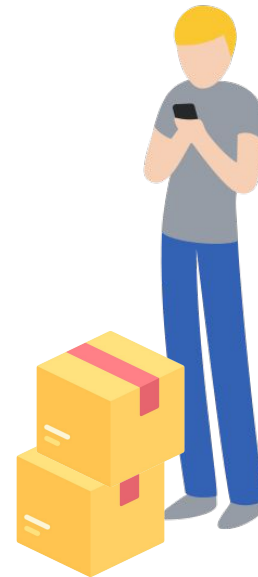
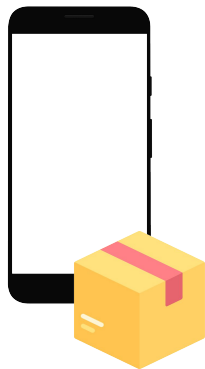
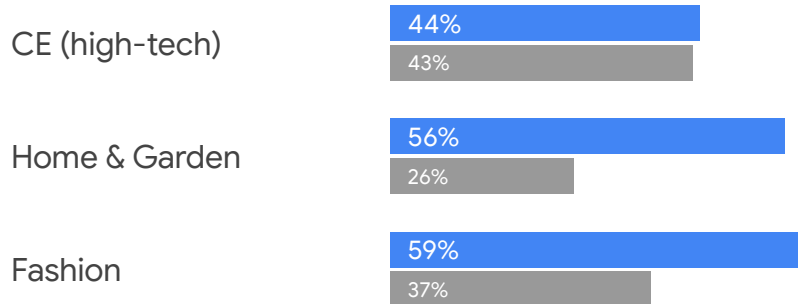
63%

48%

Mobile **shopping** also increased significantly across verticals, strongest uplift in home and garden

Smartphone used for online purchase

● 2021 ● 2019



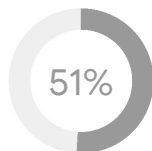
Brand / retailer **apps** increase in favourability and report more **purchases** than mobile websites

Mobile purchase performed

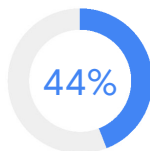
Via a mobile **website** (in browser)



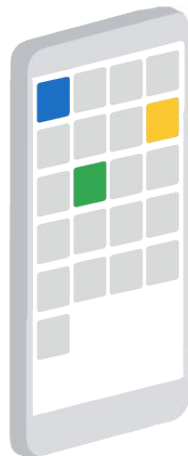
2019



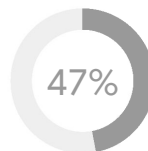
2021



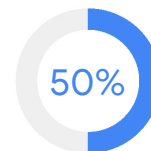
Via an **app** (provided by the brand or retailer)



2019



2021



Romania: Method and Framework

Background

The 'Smart Shopper 2021' is designed to report recent insights around shopping and research behaviour in five different product categories, comparing purchase trends in 24 EMEA markets this year. It is a repetition of a global research that ran in 2019 and 2020 to explore shifts in consumer behavior.

Target population and category definition

Nationally representative online population 18+ years who made a purchase in the included product categories. In order to provide accurate insights, each respondent has only assessed his / her latest purchase in the selected category.

Look-back window for purchases

The look-back windows in 2021 are in line with the first measurement in 2019: Past 6 months for consumer electronics, home & garden, past 3 months for fashion, past month for food & groceries and beauty.

During the acute phase of the Covid-19 pandemic in 2020 a different definition was applied, covering only purchases within 4 weeks before the survey started.

Sample size and sampling approach

n = 1.576, equally distributed per product category. Online representative quotas on age, gender, region and device usage have been applied. Each respondent was selected based on individual shopping behaviour in the relevant product categories and completed the entire survey for only one product category.

Method and survey administration

15-minute mobile-friendly online-survey in local language. Survey was programmed via Qualtrics software and fielded in CINT panels. Reporting via zweipunkt.



Fieldwork timings

2019: 08/16 - 09/19
2021: 06/01 - 06/28

Weighting

Weighting according to CCS 2017, a global and nationally representative Enumeration study.

2-step weighting process:

- 1) Product-level weighting to ensure proper product sample representation
- 2) Total level weighting to account for actual product purchase shares

Important note

The results at a market level are only representative for the shopping population of the selected 5 product categories. A direct market comparison is hence only valid if the markets selected have similar products included and use same look-back window definitions.

Markets run in 2020 or 2021

Europe: Germany, UK, Italy, Spain, Portugal, France, Poland, Slovakia, Hungary, Czech R., Greece, **Romania**, Ukraine, Netherlands, Denmark, Sweden, Belgium, Finland, Norway
MENA: Israel, Russia, Saudi Arabia, South Africa, Turkey, UAE.

Researched categories in the Smart Shopper 2021 study

Core Category	Sub Category	More detailed category description
 CE: Consumer Electronics (high-tech)	Home electronics	TV and home cinema / gaming / audio and hi-fi
	Mobile devices	tablets, smartphones, home assistants, cameras
	Laptops, Computers	computer (desktop, laptop)
 HG: Home & Garden	Large home appliances	white goods, e. g. washing machine, dishwasher, refrigerator, stove / oven
	Small appliances	cleaning / kitchen / personal care
	Garden furniture	
	Furniture	living room / bedroom / kitchen
 Fashion	Clothing / Outerwear	women, men, children, coats and jackets / dresses and skirts / pants / business clothes
	Fitness / Athletic Clothing	clothes for e. g. football, cycling, swimming, fitness, outdoor, hiking
	Footwear	women, men, children / formal, casual, comfort, sport shoes