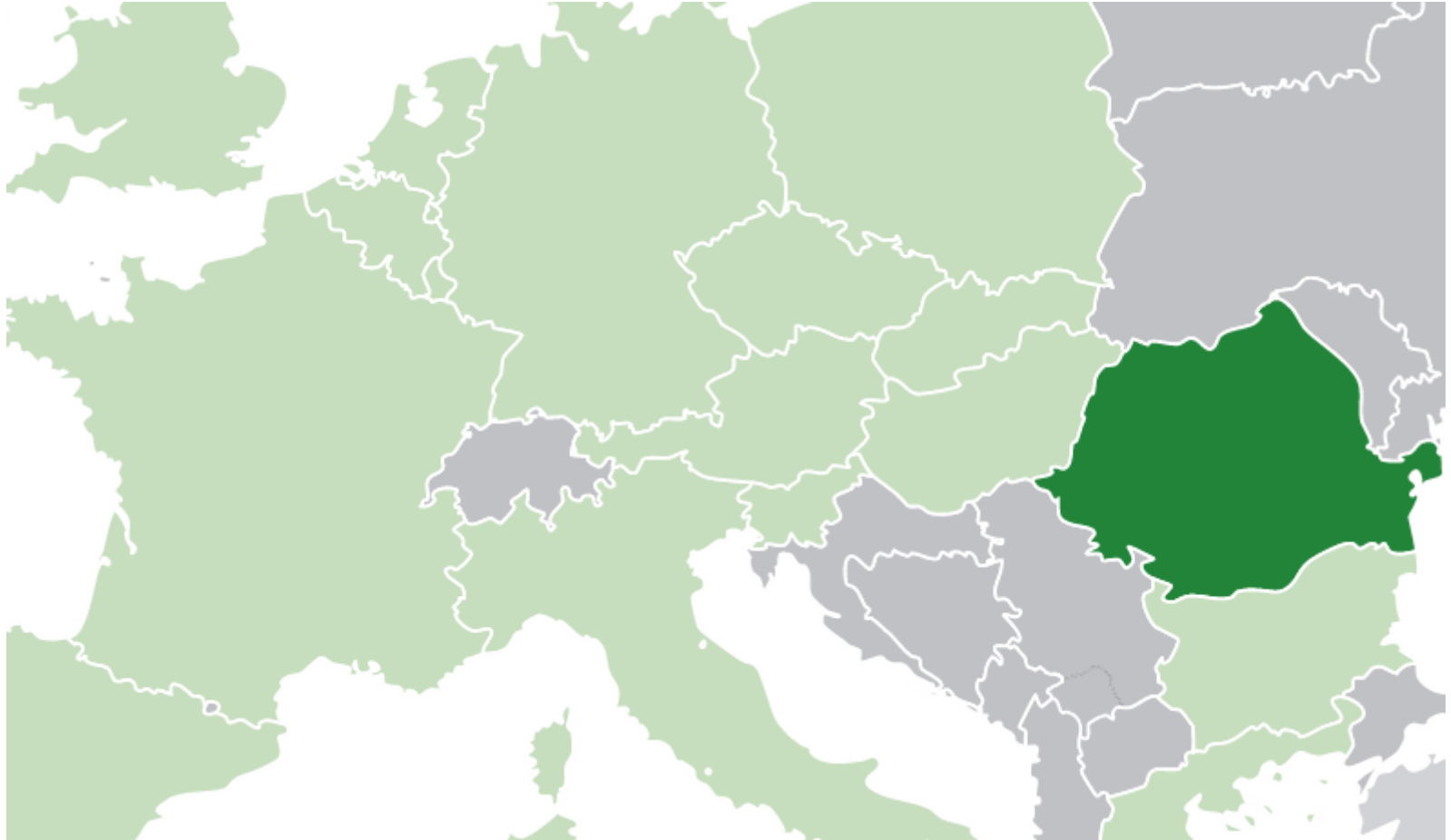


Trends in Online Buying Behavior Romania and Bulgaria

Romania



Bulgaria



Romania 2011

- 22 m people
- 7.5 m online
- 3.7 m (48%) on facebook
- 1 m online buyers
- > 2.000 online shops
- 350 m Euro online retail market
- ~ 50 Euro average online purchase
- >90% payed cash on delivery

Bulgaria 2011

- 7.3 m people
- 3.3 m internet users
- 2.2 m (65%) on facebook
- ~400 k online buyers
- > 500 online shops
- 120 m Euro online retail market
- ~50 Euro average online purchase
- >90% payed cash on delivery

Ro + Bg 2011

- 30 m people
- 11 m internet users
- 6 m on facebook
- 1.4 m online buyers
- *50% of households with children (and 37% of households without kids) have internet connection (Ro)*
- *2nd and 3rd countries in the world by download speed (15.27 Mbps in Ro) – Germany is 22nd and US is 26th (4.81 Mbps). (Pando Networks study 2011)*

What are they buying?

- IT&C, Electronics, Home appliances (over 50%)
- Fashion
- Collective buying offers
- Child-care products
- Books
- Plane tickets (sports, concerts)

Online buyer profile - 2000

- 110% Geek
- Computers
- Games
- Books



Online buyer profile - 2002

- Geek's friends
(98% geekiness)
- Funny t-shirts
- Weird gadgets



Online buyer profile - 2004

- Geek's girlfriend (60% geekiness)
- Clothes
- Cosmetics
- Concert tickets



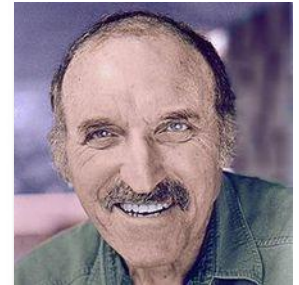
Online buyer profile - 2006

- Girlfriend's new boyfriend
(0.8% geekiness)
- Football tickets
- Sport equipment



Online buyer profile - 2008

- Geek's acquaintances
(0% geekiness)
- Home appliances
- Child care products
- Plane tickets



Online buyer profile - 2010

- Geek's parents
(- 400% geekiness)
- We have no idea



.bg “laptop” search trends 2006-2011

Web Search Interest: laptop

Bulgaria, 2006-2011

An improvement to our geographical assignment was applied retroactively from 1/1/2011. [Learn more](#)

Totals

laptop 65

Interest over time

☐ Forecast ☒ News headlines

[Learn what these numbers mean](#)



 [Embed this chart](#)

.bg “refrigerator” search trends 2006-2011

Web Search Interest: хладилник

Bulgaria, 2006-2011

An improvement to our geographical assignment was applied retroactively from 1/1/2011. [Learn more](#)

Totals

хладилник 51

Interest over time

☐ Forecast ☒ News headlines

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The last value on the graph is based on partial data and may change. [Learn more](#)

[Google](#) [Embed this chart](#)

.ro “air conditioning” search trends 2006-2011

Web Search Interest: aer conditionat

Romania, 2006-2011

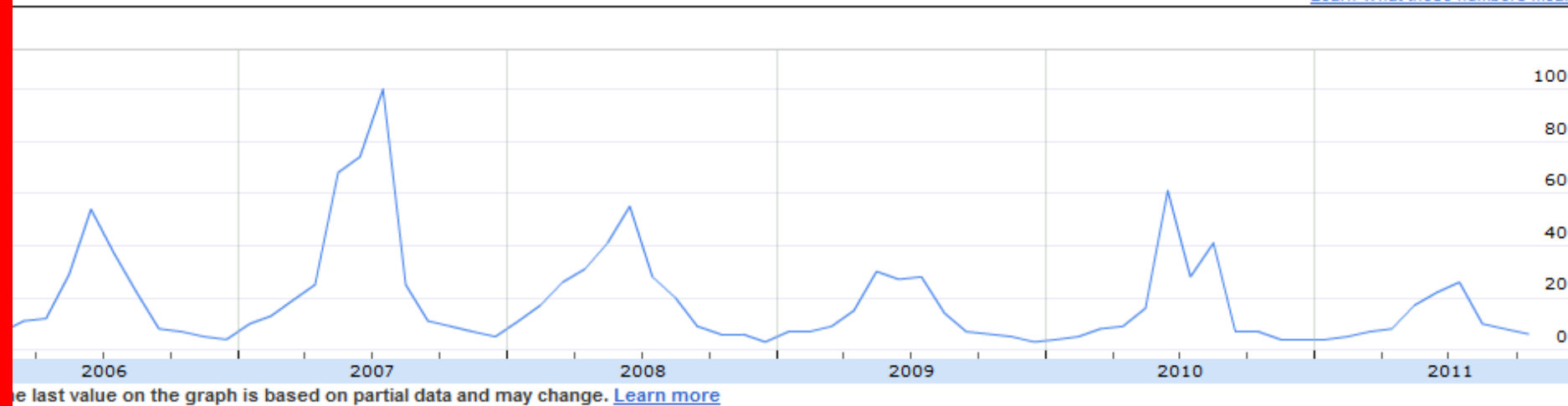
An improvement to our geographical assignment was applied retroactively from 1/1/2011. [Learn more](#)

Totals [?](#)
aer conditionat  18

Interest over time

☐ Forecast [?](#) ☐ News headlines

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 [Embed this chart](#)

.ro “clothes” search trends 2006-2011

Web Search Interest: haine

Romania, 2006-2011

An improvement to our geographical assignment was applied retroactively from 1/1/2011. [Learn more](#)

Totals [?](#)

haine  66

Interest over time

☐ Forecast [?](#) ☐ News headlines

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.ro “shoes” search trends 2006-2011

Web Search Interest: pantofi

Romania, 2006-2011

An improvement to our geographical assignment was applied retroactively from 1/1/2011. [Learn more](#)

Totals

pantofi 51

Interest over time

☐ Forecast ☒ News headlines

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.ro “cheap” search trends 2006-2011

Web Search Interest: ieftin

Romania, 2006-2011

An improvement to our geographical assignment was applied retroactively from 1/1/2011. [Learn more](#)

Totals

ieftin 47

Interest over time

☐ Forecast ☒ News headlines

[Learn what these numbers mean](#)

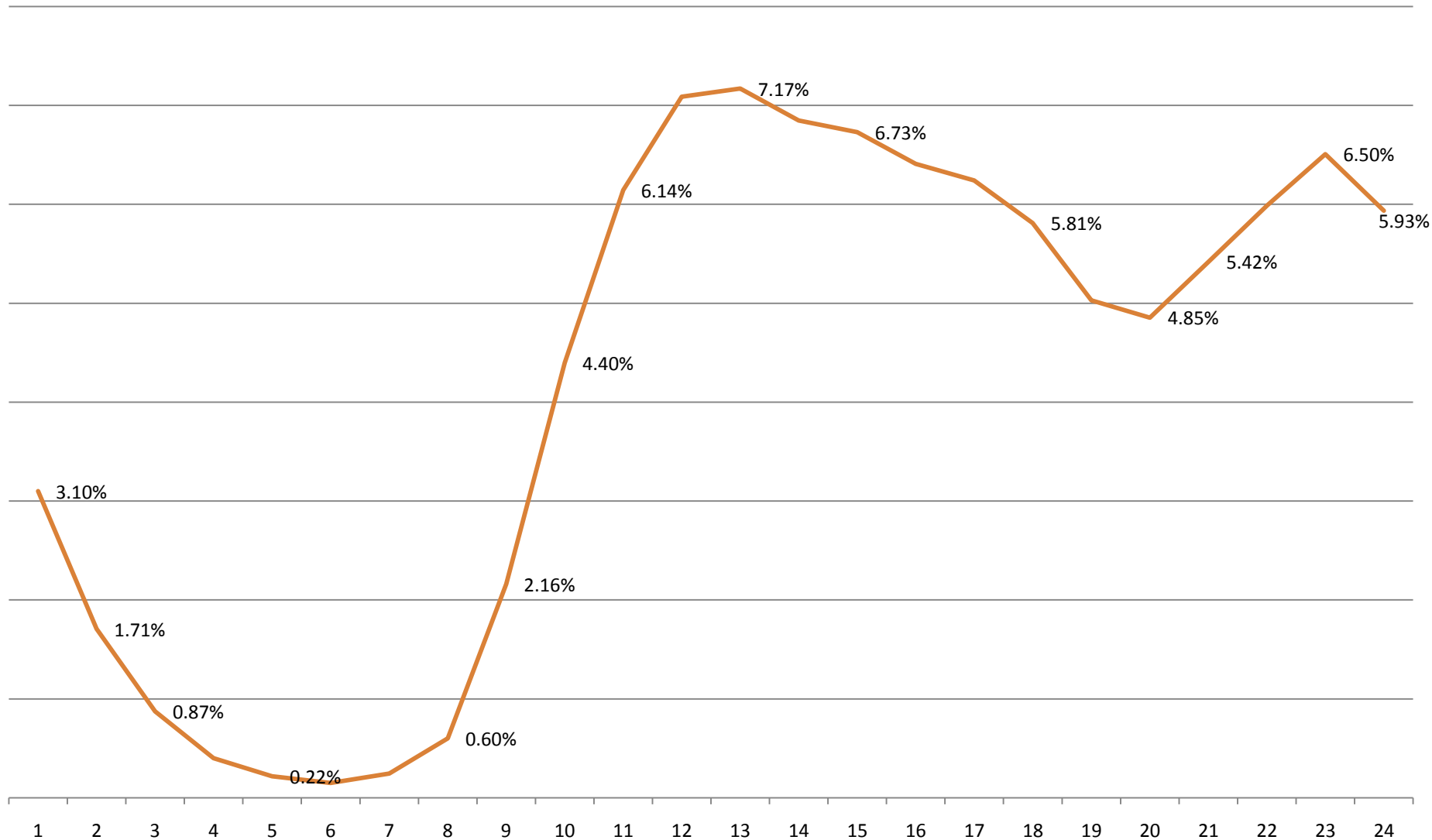


[Embed this chart](#)

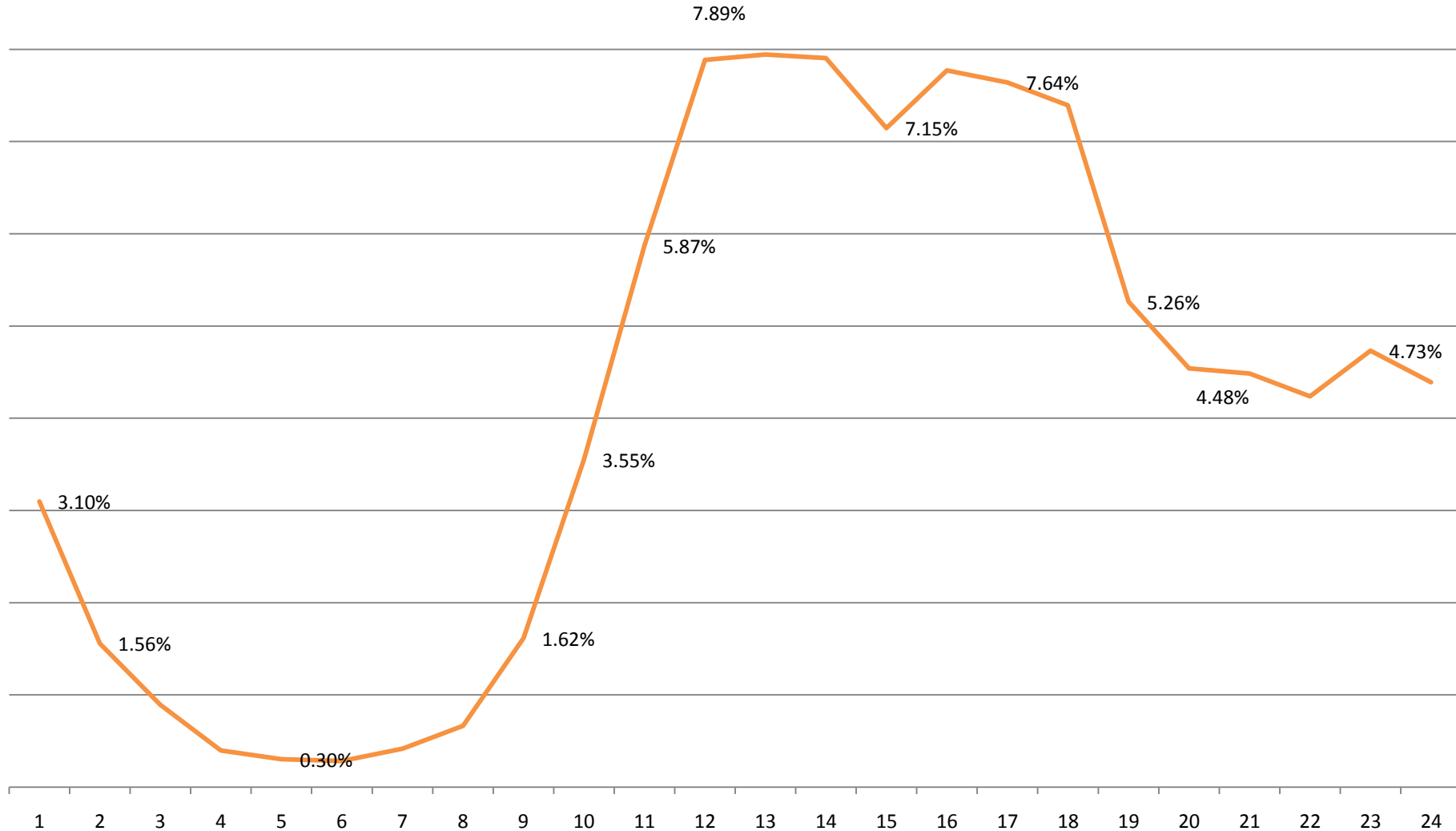
2011

- Collective buying sales boom (10 m Euro in Ro)
- Fashion and child care is getting mainstream
- Non-geeks are coming (and pay online)

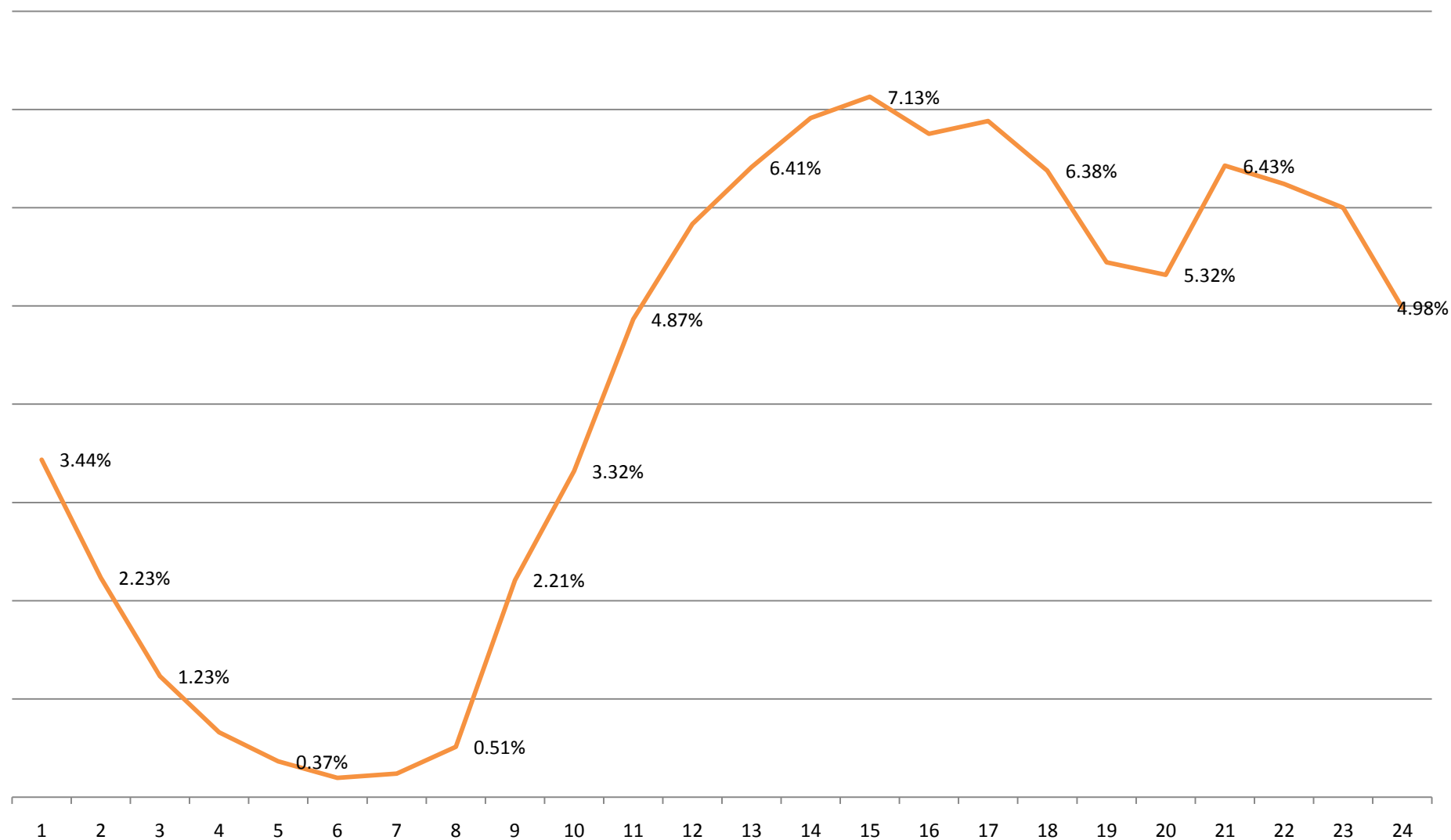
number of online sales - distributed by hours (ro, 2011)



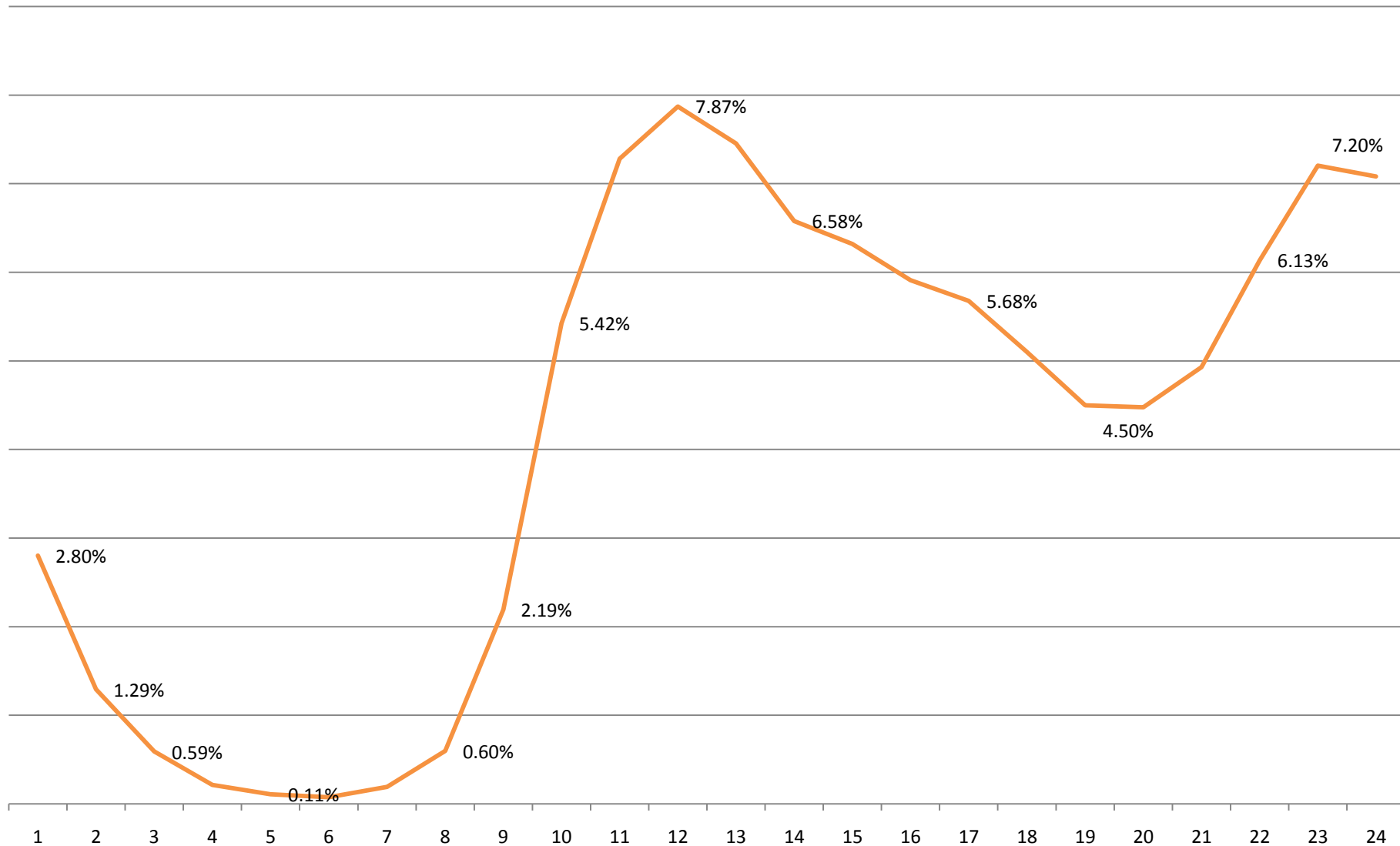
Number of IT&C online sales, distributed by hours



fashion online sales, distributed by hours



Collective buying online sales, distributed by hours



Next

- Big retail guys are coming – Metro, Carrefour
- 1 mld Euro online commerce market in 2013 (Ro)
- Fashion, child-care products, tourism are growing fast (first 2 will overcome IT&C online sales in 2013)
- Collective buying is here to stay
- Online payments is growing
- People are buying from home

2parale.ro - **THE** affiliate network in Romania

- launched in Jan 2009
- +100 advertisers, +7.000 affiliates
- +10.000 monthly sales & 15.000 leads
- +1.5 m clicks per months
- +3 m Euro generated sales for advertisers

2leva.bg – Bulgarian affiliate network

- launched in April 2011
- 5 advertisers & 200 affiliates and growing fast

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online

WatchShop
Magazin online cu ceasuri originale

clickshop
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CONTINENTAL
HOTELS

February, 2011, 2012

Romanian eCommerce Conference held in Timisoara
ecomTIM.ro

over **150 attendees**

sponsored by **ePayment** (the Romanian market leader in online payments).

The guest list featured as **speakers** the Country managers of Google Romania and Groupon Romania, as well as other well known entrepreneurs and industry influencers and specialists: Marius Ghenea, Cristian Manafu, Andrei Radu, Alin Popescu, Bogdan Manolea, Doru Panaitescu and Liviu Taloi.



Thank you

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