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E-commerce Jump 2020, the Survey of Suppliers and Consumers in Kazakhstan, as well as Ways for Growth Following Worldwide Leaders Examples.

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Abstract

The pandemic made significant changes in our lives worldwide, many businesses in different directions and sizes suffered, but e-commerce grows up. E-commerce is the profit recipient in the current Covid19 restriction reality. The present situation with the pandemic forced more and more consumers to buy online; sellers followed them and started selling online. All this stimulated the development of all e-commerce chains, including delivery services, promotion services, and of course, the entire supply chain.

But e-commerce growth is not the same in different countries, and there are some great examples that authors study, analyze, compare with Kazkhsatan online trade, and find some recommendations for further sustainable development. Our research covers both sides, Kazakhstani online traders and online consumers.

Existing changes do not stop after the pandemic end customers' habits for purchases already transform, and this transformation will be stable for online trade. Here are some possibilities from leaders which Kazakhstan companies could use in their practice.

Keywords: e-commerce, online trade, channels for e-commerce, online customers, SMM commerce, marketplace

Introduction

At present, about 205 countries are affected by Covid 19; as stated by the World Health Organization (WHO), on July 01, 2021, cases of illness were more than 206 million worldwide.

The pandemic affected and already changed everyone's daily lives of people around the world. The periodic lockdowns and constant restrictions significantly influenced the economy and e-commerce and accelerated online purchases (Nakhate & Jain, 2020). According to innovation diffusion, new products are diffused to the majority though consumers who are "enthusiasts," well known as "early adopters," promote the new products or services to own social circles, and spread through network influence (Rogers, 1983). Diffusion theory settled two consumers group by enthusiasm for novelty and uniqueness: early and late adopters (Howland, 2020). When e-bay in 1998 presents the new way of shopping – online, 46% of early adopters began using e-commerce frequently, while only 8% of late adopters had an experience of web shopping (Howland, 2020). Now, throw one and have of the year of the pandemic we see accelerated of online shopping. Online shopping offers greater flexibility in terms of time, location, and product variety (Rohm & Swaminathan, 2004), but it could be only one opportunity to make purchases event the vital one in lockdown time. The pandemic serves as a trigger that involves the late majority, who were antagonists to online shopping, finally started shopping online (Peres et al, 2010). However, we should pay attention that late adopters are restraining and skeptical in score to new experiences. However, if the "late majority" has likely positive practice by online shopping, as reliable and secure purchasing, they are likely to go shopping online even when the pandemic stops (Kim, 2020)

As a result, in 2020 in considerable growth of e-commerce throughout the world. E-commerce has become one of the beneficiaries of the global pandemic.

But, of course, it was not uniform and equal, the economy of each country has its characteristics, and online trade to each country in the world has a high pace and specificity of development. Therefore, the authors of this paper review the leader's online trade markets, analyze best practice examples from different country markets, recognize some effective methods and channels for e-commerce development in Kazakhstan.

This article is structured as follows: the next section presents the research problem, a literature review, methodology description ahead of conclusions and discussion, and contributions and findings are offered at the end.

Research Problem

Last decade eCommerce is one of the most developing sectors in the economy in the majority of the countries. The authors would like to understand the impact of Covid 19 on e-commerce around the world, compare it with the development of online commerce in Kazakhstan, and find ways to develop it in Kazakhstan. In this review, we will consider an example of the most developed e-commerce market globally, compare it with the top ten countries in terms of e-commerce growth and see Kazakhstan data for the last couple of years of development. Also, the authors examine Kazakh online buyers and factors that help develop this sector and its constraints for understanding the future direction and opportunities of Kazakhstan's online trading.

Literature Review

The most significant e-commerce growth rate at the end of 2020 the year marked our neighbor, the China Republic. At the end of 2020, the volume of online trade in China reached 2.297 trillion US dollars, which amounted to 44.8% of the total retail trade turnover in all of China. The growth from 2019 to 2020 was 10.9%. According to the forecast of the development of the Chinese e-commerce market, a historic event awaits in 2021 - the volume of online trade will surpass the size of offline business in the total amount of retail sales: the forecast of e-commerce turnover is 2.779 trillion US $, which will be 52.1% (Emarketer & Cramer-Flood, 2021).

Moreover, 2022 is expected to transition to online 55.6% of total retail sales in the money it will be 3.085 trillion $ US (Marketingcharts, 2021). It should be noted that this data includes the purchase of products and services, paid for via the Internet, using any device, regardless of the method of payment and packaging; excluding the cost of tourist trips and tickets for concerts, utilities, and other expenses, gambling, these figures also do not include data for Hong Kong (Emarketer & Cramer-Flood, 2021).

Nowadays, China's e-commerce success is unmatched worldwide. South Korea is next in terms of the share of online commerce in total retail sales (Emarketer, Ethan Cramer-Flood, 2021); in 2021, it will account for 28.9% of Internet sales. This indicator will reach only 15.0% in the USA, and the weighted average size among Western European countries will be 12.8%. (Emarketer & Cramer-Flood, 2021). Ten years ago, online commerce in total retail trade in the United States and China was virtually identical at 4.9% and 5.0%, respectively.

The USA expected e-commerce retail sales to reach $6.5 trillion by 2023 (Jones, 2020), demonstrating immense online trade growth. More detailed information of the top ten countries by E-commerce development is presented in Figure 1.

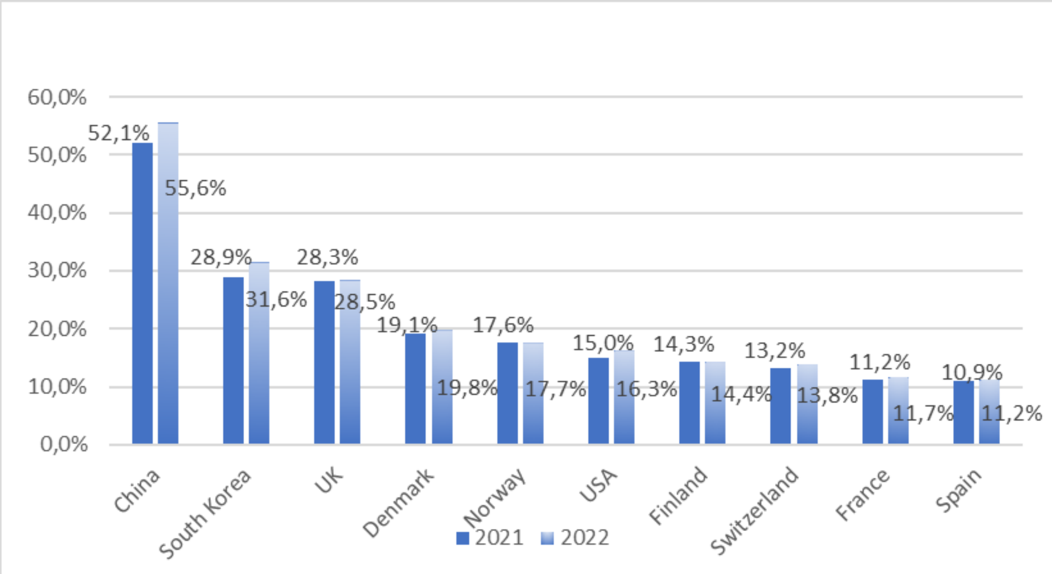

Figure 1. The top ten countries by E-commerce development, 2020

For years, China is the world leader in the sales of e-commerce and e-commerce share in the retail trade. Not so long ago, in 2018, this proportion was just 29.2% (Marketingcharts, 2021), which is close enough to the share of the first e-commerce in South Korea and the UK this year. In the last few years in China, the enthusiasm for e-commerce has accelerated rather than stabilized. The indicated trend appeared even before the pandemic, and the pandemic became its catalyst.

But there is the note that online trade grows more quickly in developed countries, even in developing countries, such as Pakistan. In Pakistan, e-commerce was started in the 2000s and developed very slowly; only 3% of the population was buying online before the pandemic. (Bhatti, 2018). But in the pandemic, e-commerce in Pakistan increased by 10%, and for 15%, the number of internet users increased. (Niazi, 2020). The success of online trade depends on many idiosyncratic factors, possible that no other region will not mimic the transformation of e-commerce in other countries - or at least not to the same degree.

Returning to China's e-commerce as an example of the most extensive development, let's consider what factors have positively impacted the rapid growth of e-commerce in China (Belretail, 2021). The advent of Alibaba, a revolutionary, ubiquitous, and easy-to-use Chinese platform, has provided consumers with affordable and reliable access to almost anything imaginable and fast delivery of anything. JD.com used Alibaba's successful example to give another clear option for shoppers.

Digital payment systems like Tencent's Alipay and WeChat Pay have far outstripped Western vendors regarding accessibility, ease of use, and the speed they offered online payment options (Klein, 2019).

Almost unlimited offer inexpensive service delivery and provided by the million-strong army of Chinese workers allowed companies Alibaba and JD.com to deliver on the same day to anywhere in the country for a minimal fee. It was the most significant advantage for beginner doubters - buyers.

Mobile Commerce based on smartphones came into existence very early based on China's economic development and the fact that most consumers have not been included in the era of personal computers and joined the Internet age directly through mobile devices.

Relying on early enthusiasm and, of course, due to its vast population - China today is far gone forward in developing e-commerce. Even though the US is still ahead of China on the overall volume of retail sales 5.506 trillion from $ 5.130 trillion in 2020 (Marketingcharts, 2021), China will overtake the United States with nearly 2 trillion dollars in electronic trading this year.

Analyzing Covid's 2019 impact of eCommerce, we would look at the product line since there is a different influence on various products. During the pandemic in 2020, products with immense demand were toilet paper, disposable gloves, freezer, bidet, kettlebells, bread machine, paint by numbers, puzzle, peloton, coloring book, air purifier, treadmill, stationary bike, yoga mat, refrigerator, an exercise ball and exercise equipment. The products that declined by Coronavirus are luggage and suitcase, briefcase, cameras, men's swimwear, women swimwear, bridle dress, men formal dress, gym bags, rash guards, boys, athletic shoes, toys, lunch boxes, wallets, watches, girl's jackets and coats, boy's top's and caps, and others (Andrienko, 2020).

In the end, we have to identify eCommerce trends that would reshuffle the industry landscape in the coming years: 1. rising consumer expectations, such as Amazon's increasing customer expectations for online stores, special services such as www.semirash.com are registering an increase in requests for two-day shipping, an increase in abandoned carts, and skyrocketing digital marketing spending; 2. competition from Google, while organic and paid search is still one of the most potent traffic catalysts in e-commerce, Amazon, Facebook, Instagram, and Bing are increasingly gaining consumer attention, alternative traffic channels such as Pinterest Snapchat and TikTok are also being added; 3. Diversification: it is more about brand discovery channels than not just about platforms. E-commerce marketers should also point out particular indexes, with local index, image, and YouTube search offering smaller audiences — often at an extra cost-sufficient rate, though Google and Facebook ads still playing a dominant role in brand promotion channels; 4. Existing customer data: With many brands exhausting their net new customer base, targeting existing customers is as crucial as ever. It opens opportunities for customer activation and reactivation approaches and channels; 5. multichannel eCommerce marketing involves a narrow offline-online tie: offline retail sales are still covered over online sales, even though increased digital spends are accepted. Therefore, overpassing the online-to-offline gap is vital for your brand development (Andrienko, 2021)

Research methodology

For this paper's research aim, secondary data were used of two types of research made in Kazakhstan, one is from the side of market players, and the second one is the side of consumers.

To understand the seller's market, we use data provided by the Digital Kazakhstan Association and PWC (PWC, 2021). This study took part various providers of the e-commerce market in Kazakhstan: Mechta.kz, Leroy Merlin Kazakhstan, Kaspi.kz, Kazpost, and many other companies are wishing to maintain confidentiality. The research was carried by in-depth interview and focused on the following three parameters: retail e-commerce market for 12 months of 2019 and 12 months of 2020, sales volumes and number of transactions, average check, and changes in average check-in retail e-commerce. For this study purpose, we should say that retail e-commerce includes business activities associated only with the online sale of goods by individuals with delivery or pick-up from stores and points of issue in Kazakhstan. The following categories are excluded from the calculations: sale of railway and air tickets, food delivery, ad sites, coupon services, utilities, and other payments, as well as different categories not related to the sale of goods by an individual.

The second one is the consumer survey presented by the Alvin market (Ospanova, 2020), which analyzed the market's consumer side. The study was implemented by the Computer Assisted Telephone Interview (CATI); this method lets cover all Kazakhstan regions in research and different age groups. In the poll collected from 09/29/20 to 10/14/2020, 2169 respondents were from all over Kazakhstan (including rural settlements) aged 15 to 65 took part. The sample was distributed by region, gender, and age proportionally, according to official demographic statistics.

For collecting information about eCommerce and its development worldwide, authors applied to different resources like EBSCOhost, Google Scholars, Marketchars, and online business resources. Additional following scholarly methods were used as analysis, synthesis, and generalization of data to cover the purpose of the exploration.

Findings and discussion

Let's now look at the online commerce market in Kazakhstan. The volume of the e-commerce market in 2020 increased by 82% compared to 2019; this is from 327 billion Tenge to 596 billion Tenge in absolute terms. In addition, the number of transactions (online orders) increased by 20%, and the average check increased by 52% in Tenge (InBusiness, 2020). The market volume of the USA dollar also grew, however less than in Tenge equivalent: by 72%, which may indicate a slight decrease in the Tenge against the dollar (Kapital, 2021). The data is displayed in Figure 2.

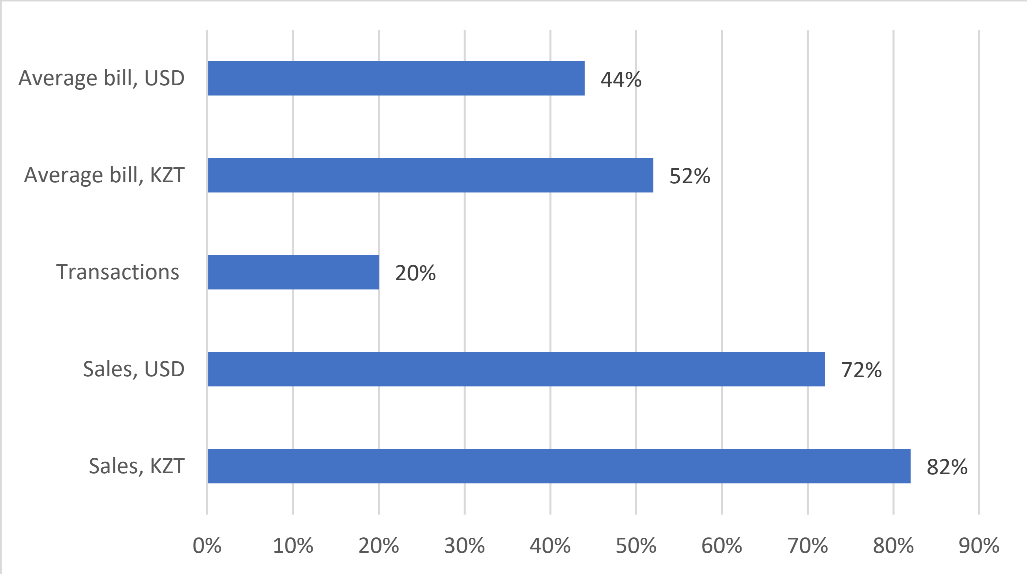

Figure 2. Key indicators of the development of the Kazakhstani e-commerce market, 2020

It should be noted that understanding retail e-commerce includes entrepreneurial activity connected with the online sale of goods to individuals or by self-delivery of the stores and distribution points. Therefore, the calculations do not have the following categories: sale of railway and air tickets, food delivery, ad sites, coupon services, utilities, and other payments, as well as different types not related to the sale of goods to individuals.

Periodic restrictions on purchases in offline stores motivated e-commerce market players to improve their electronic platforms, services, possibilities of payment, and delivery. Which positively affected the increase in consumer confidence and spurred more quickly development e-commerce.

According to the data provided by Kazpost, the number of external parcels through Kazpost for twelve months in 2020 was reduced by 37% (from the outside in Kazakhstan orders) that occurred on a background growth of amounts and domestic premises, where the increase was 22% (orders through Kazakhstan) compared with an identical period of years (PWC, 2021).

The significant drop in the number of incoming postal items in 2020 is associated, of course, with the rise in the cost of cross-border goods. Two factors can dictate the increase in the price of cross-border goods: first, a 2.5-fold decrease in the threshold for duty-free import of goods for personal use from January 1, 2020 (from 500 to 200 euros); in a second, the devaluation of the national currency (PWC, 2021).

At the end of 2020, sales increased by 1.8 times against the background of growing transactions by only 1.2 times (Profit, 2021). Therefore, we can put forward an assumption about the growth of more expensive and significant purchases, for example, electronics and household appliances, or there was an increase in the number of goods in one order, which is confirmed by the rise in the average check of Kazakhstanis in Tenge by 52%.

Now let's look at the side of Kazakhstan consumers of e-commerce. First, the portrait of the buyer can be represented as follows: this is a woman, a city dweller, most likely living in Almaty, under 45 years old, in most cases, with an income above the minimum (Peres et al., 2010).

Second, the decrypted consumer data is as follows: 43% of all online shoppers are men and 57%, respectively, women, 26% are rural residents, and 74% are city dwellers, only 26% of buyers are over 45 years old, in terms of income 78% have an income above the minimum, only 22% of respondents have a minimum personal payment; by occupation, this group includes the unemployed, homemakers or retirees (Ospanova, 2020). Finally, it should be noted that 74% of online sales are in four large cities of Kazakhstan: Almaty, Nur-Sultan, Karaganda, Shymkent, while the lion's share (50%) of online sales is carried out in Almaty (365 Info, 2020).

According to the online shopping repertoire, 57% of shoppers buy only one category of goods, 27% purchase two categories online, and 15% of respondents make purchases in three or more categories. Preferred shopping categories by gender of respondents look very interesting. The number one category for women (33%) is clothing, footwear, and accessories for adults; for men, this category is equivalent to priority (20%) and household appliances and smartphones, tablets, and accessories. But the average bill in the category of clothing, footwear, and accessories for adults for men (59,000 Tenge) is twice as high as for women (28,000 Tenge). In household appliances, men have the highest average bill (139,000 Tenge), women have the third-largest account (79,000 Tenge). On average, men pay 107,000 Tenge for smartphones, tablets, and accessories, while women pay 87,000 Tenge (Ospanova, 2020).

In the current situation with the pandemic, it is interesting to look at the category of hygiene and cosmetic products, here women's purchases prevail (15%) but lag behind men in terms of the average check: the average bill for women is 16,000 Tenge, and for men 18,000 Tenge, but only 3% of men make purchases in this category. In the medicines and dietary supplements class, women again prevail (7%) with an average check of 20,000 Tenge; men in this category make purchases much less often (3%) but spend 25% more than 25,000 Tenge. Finally, of course, we need to consider ordering ready-made food from cafes and restaurants, where the average check is identical for men and women - 7000 Tenge, but here are men 16% and women 13% make purchases. Interestingly, 23% of respondents ordered this category via Instagram, 20% via Glovo, 12% via Chocofood, 5% Wolt, and 3% via Yandex.Food (Ospanova, 2020). More details on product categories are presented in Table 1.

Table 1. Consumption data by product category by Kazakhstani online buyers, disaggregated by gender.

Product category	Men number, in%	Men average bill, Tenge	Women numbers, in%	Women average bill, Tenge
Clothes, shoes, and accessories for adults	Twenty	58000	33	29000
Appliances	Twenty	139000	Fourteen	79000
Smartphones, tablets, and accessories for them	Twenty	107000	Four	87000
Children's clothing, footwear, and accessories for children	Five	13000	Eighteen	16000

Sanitary and hygienic and cosmetic products	3	18000	Fifteen	16000
Medicines and dietary supplements	3	25000	7	20,000
Ordering ready-made food in cafes and restaurants	sixteen	7000	13	7000
Electronics, TV, audio and photo	eleven	700,000	2	82000
Auto parts and products for photos	fourteen	35000	One	35000

Let's continue to look at the places of purchase of Kazakhstanis and highlight the most frequently used ones in the context of four popular categories in e-commerce. In the category of clothes and shoes with accessories for adults, most often (19%) are bought on Wildberries, 18% of respondents make purchases on AliExpress, 14% make purchases at Kaspi.kz, and 7% through social networks. Most purchases of household appliances (67%) are made in Kaspi.kz. There are two main shopping places for purchases of smartphones, tablets, and accessories Kaspi.kz (55%) and AliExpress (15%). Finally, children's clothes, shoes, and accessories are mainly made on Wildberries (21%), 15% make purchases at Kaspi.kz, 10% on AliExpress, and 7% buy through social media networks (Ospanova, 2020).

What are the reasons for helping to make online purchases from the point of view of Kazakhstani buyers: in the first place is time savings (35%), followed by home delivery (32%), low prices, and the ability to find goods that are not available elsewhere take third place (20% each). Three reasons are the same, and they weigh 14% each in the eyes of Kazakhstanis. These are feedback from other buyers, the 24/7 mode of operation, and the possibility of comparison. The next one is the ability to avoid the hustle and bustle of offline stores and access to detailed information (13% and 11%, respectively) (Ospanova, 2020).

Among the reasons hindering development, first of all, consumers named the lack of opportunity to try on and touch (23%); interestingly, this reason is assessed differently for residents of villages (16%) and cities (32%). The second reason is the possibility of receiving a poor-quality product (16%), a long wait (8%) takes the third place, the case of an error and delivery of another product is holding back 6% of buyers and the last reason is a fraud (4%). In the end, we single out a group of respondents (11%) who said that they are satisfied with everything and they do not see any negative reasons to shop online (Ospanova, 2020).

From the player's and experts' point of view of this market, it is also necessary to refer to commodity logistics, including regional centers, as the limiting factors (Kapital, 2020). A significant role played by reducing delivery times and the essential and special conditions for storage and transportation of specific categories of goods. There is optimism in these issues, thanks to the entry into the Kazakhstan market of new logistics players who already have experience reducing the delivery time from several days to several hours. Developing secure ways to pay for goods purchased online is a second priority. And the question of the third priority is the maximum possible simplification of the return conditions.

It would be inappropriate for our review not to consider the possible sources of e-commerce growth. It's worth starting with social commerce. This expression not only inspires social media in the United States, but it has also taken its place in China as well. According to e-marketer (Emarketer & Cramer-Flood, 2021) estimates, social commerce in China grew 44.1% last year and will grow another 35.5% this year to reach $ 363.26 billion. By comparison, a social business in the United States will hit $ 36.09 billion this year.

Studies by foreign authors emphasize the positive impact of SMM on the development of e-commerce. According to an Indian researcher (Yadav & Rahman, 2018), SMM, from consumers' point of view, includes five dimensions: interactivity, information content, word of mouth, personalization, and relevance. Second, the assumed parameters of e-commerce SMM significantly and positively affect all drivers of customer capital (customer equity factors - CED). Third, the CED of e-commerce increases and positively impacts customer loyalty to e-commerce sites that will be e-commerce (Ou et al., 2017).

You can consider here two examples of the development of online commerce through the SMM WeChat and Pinduoduo. WeChat mini program. As ubiquitous as Tencent's excellent app has been in China for nearly a decade, WeChat's interface has only recently begun to facilitate e-commerce skillfully. Mini-programs allow all businesses to make better use of the WeChat user base, and as a result, they have become extremely popular with both merchants and consumers. As soon as WeChat introduced the Mini Programs option, a real boom in social commerce began in China. More than $ 200 billion in purchases were made through these programs last year and are considered social commerce.

Pinduoduo. The group shopping and social media phenomenon grew from 0.5% of China's e-commerce market in 2016 to a projected 13.2% in 2020 (The Alibaba claims by 50.8%, while the JD. Com - to% 15.9.). Pinduoduo unblocked China's participation in e-commerce in rural areas is more effective than any other platform - in terms of both purchases and sales - and almost instantly became the fourth largest e-commerce company globally. Pinduoduo's value proposition remains almost unique, even globally. For example, there is no platform for creating massive discounts on wholesale purchases for communities in the US market, and it is unclear whether they will ever be.

Data on Kazakhstan consumers who prefer to make purchases on marketplaces make it possible to single out the three most popular. The Kazakh platform is Kaspi.kz, the Chinese one is AliExpress, and the Russian one is Wildberries.

Kaspi.kz is used by 53% of women, 40% are aged 25-34, and 24% have determined their income from 100 to 150 thousand Tenge per month.

Among Kazakhstan buyers on AliExpress, 59% are men, 19% have high education, and 20% have no permanent income.

At Wildberries, 77% of women shop, 90% urban dwellers, and 15% 45 to 54. Marketplaces are an excellent opportunity to develop online sales for small and medium-sized businesses.

When the target audiences of the marketplaces above coincide with the companies' target audience, it can be an excellent opportunity to develop and increase sales in e-commerce. During a pandemic, e-commerce under new digital technologies will provide opportunities for economic development and job creation.

Contribution of the paper

This paper contributes to the business area through analysis, offering a methodology for developing e-commerce projects and government services to develop Kazakhstan's online commerce in general. In addition, some trends are presented here as directions for development through testing and market adaptation which could be base for developing a strategy for increasing online commerce from all over parts of its: customers side, selles side, delivery, logistic and online promotion.

From a scientific point of view, this article can be part of a scientific study to build a working system with consumers to increase sales and collect feedback through the SMM.

There is data for further research on this subject on other geographical, international, and local markets and countries for scholar contribution.

Conclusions

Concluding the review, it is necessary to note the sad reason, and, unfortunately, not decreasing so far in importance, the pandemic and the quarantines associated with it, as a continuing incentive to make online purchases in Kazakhstan and other world markets.

In Kazakhstan, the E-commerce industry landscape is developing, involving all parts of the market. We saw that the consumer's side had shown willingness to shop online and even recognized the global trend of shopping development in social copper. For consumers existing and develop a sufficiently high level of mobile and Internet payments, where Kaspi is the leader and driver of the development of payment systems, helped Kazakhstan make a significant breakthrough in the development of e-commerce. Kaspi's successful IPO also evidences this on the London Stock Exchange (Quate, 2020). Kaspi development motivated other banks to make changes in this direction, and now we see other examples of mobile payment in Kazakhstan. Here we should say that the Internet coverage of the population of Kazakhstan is 99% (Ranking, 2021). This is achieved thanks to mobile communication, which has not stable speed but gives access to the Internet in the rural sector. This matter is vital for the evolution of new forms of agricultural guidance in Internet commerce, as we have seen on the Chinese market, which could be an essential part of Kazakhstan's strategy for country agricultural sector transformation. From this point of view, the market places role is underestimated by sellers in Kazakstan. Here is a possibility for the particular project created for the agricultural sector emphasizing the Kazakh language audience, with is the primary language in the rural regions.

Another significant part of online trade delivery and logistics demonstrate not stable progress with changes in cross-board regulations and, at the same time, the arrival of new players in the delivery market, especially in big cities. All these points are based on accelerating the trade transition from offline to online and mixing these formats. It is also necessary to note another important factor that online tools give today many different possibilities for promotion and selling for all target audience groups. There is still a question about the global economy and how it will behave after the pandemic; there is no unambiguous answer to this question yet. But one thing is clear, it will not remain the same and, most likely, will not repeat the pace of development of the first decade of the twenty-first century, but e-commerce has entered our life forever.

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