

DELIVERING BESPOKE INNOVATIVE SOLUTIONS FOR THE WEB

# converge.gr

INTERNET TRENDS IN GREECE

1<sup>st</sup> Magento & Paypal Meet up

Tuesday July 22<sup>nd</sup> 2014



# overview

## Internet statistics

- Broadband access in Greece
- Current statistics
- Comparison with EU

## eCommerce

- European market
- Greek market
- Types of eCommerce in Greece



## Considerations

- Customer
- Merchant
- Agency

# Internet statistics



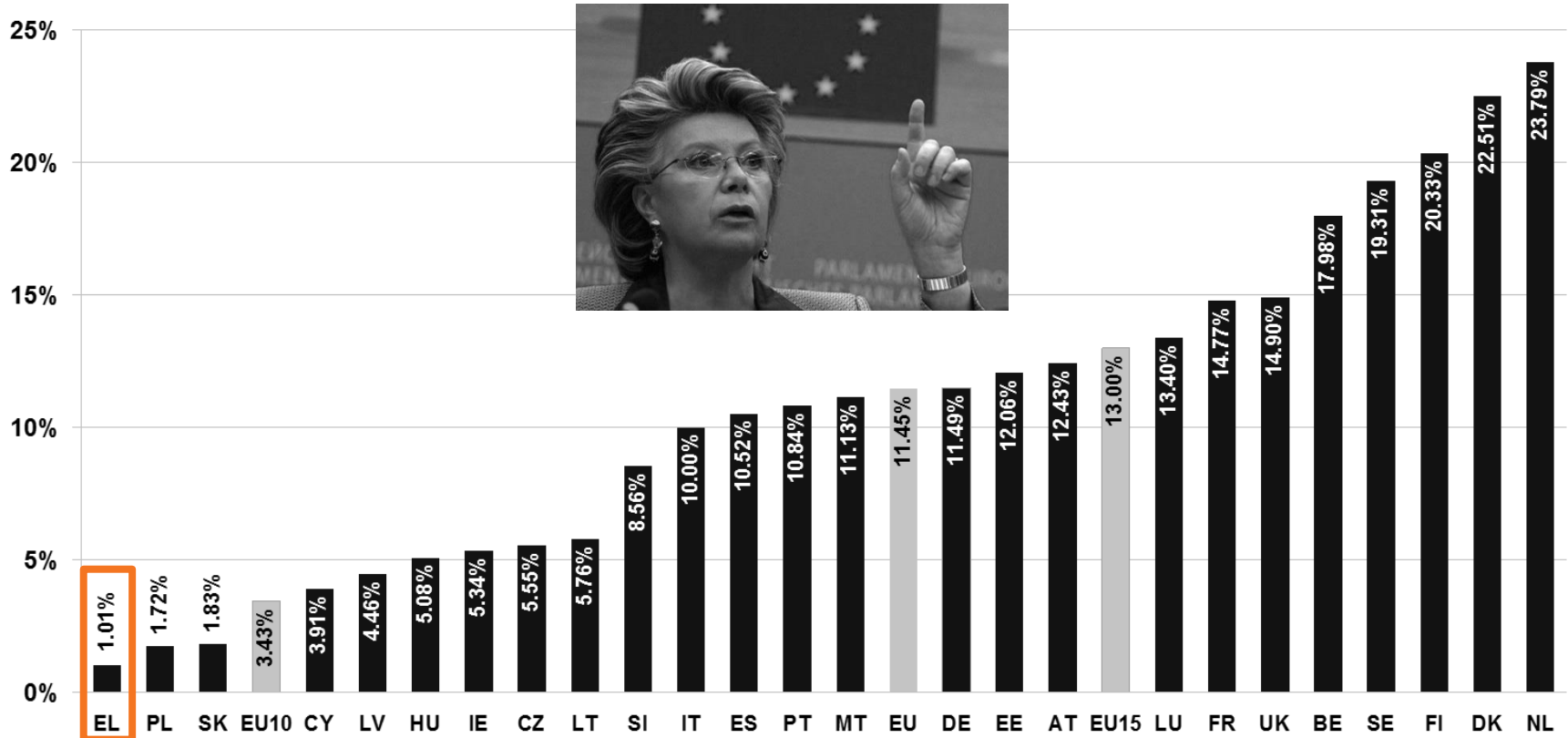
# The story of broadband in Greece

## Reding praises broadband take-up as Greece lags EU

Source: 11<sup>th</sup> Report on European Electronic Communications Regulation and Markets 2005

EU Broadband penetration rate, 1 October 2005

January 06

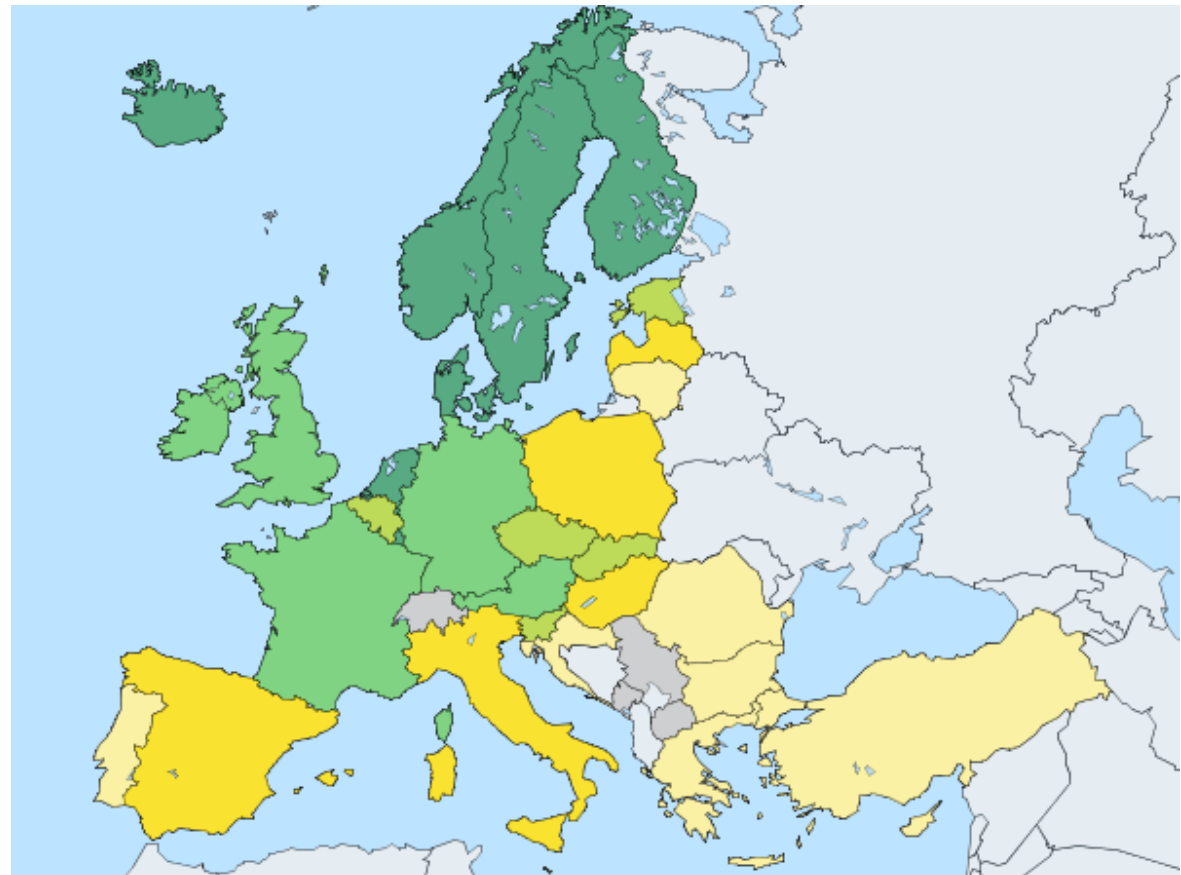


# Level of Internet access

As low as 55% percent the level of Internet access

Source: EUROSTAT

55%



Legend

49.0 - 65.0

65.0 - 72.0

72.0 - 80.0

80.0 - 88.0

88.0 - 96.0

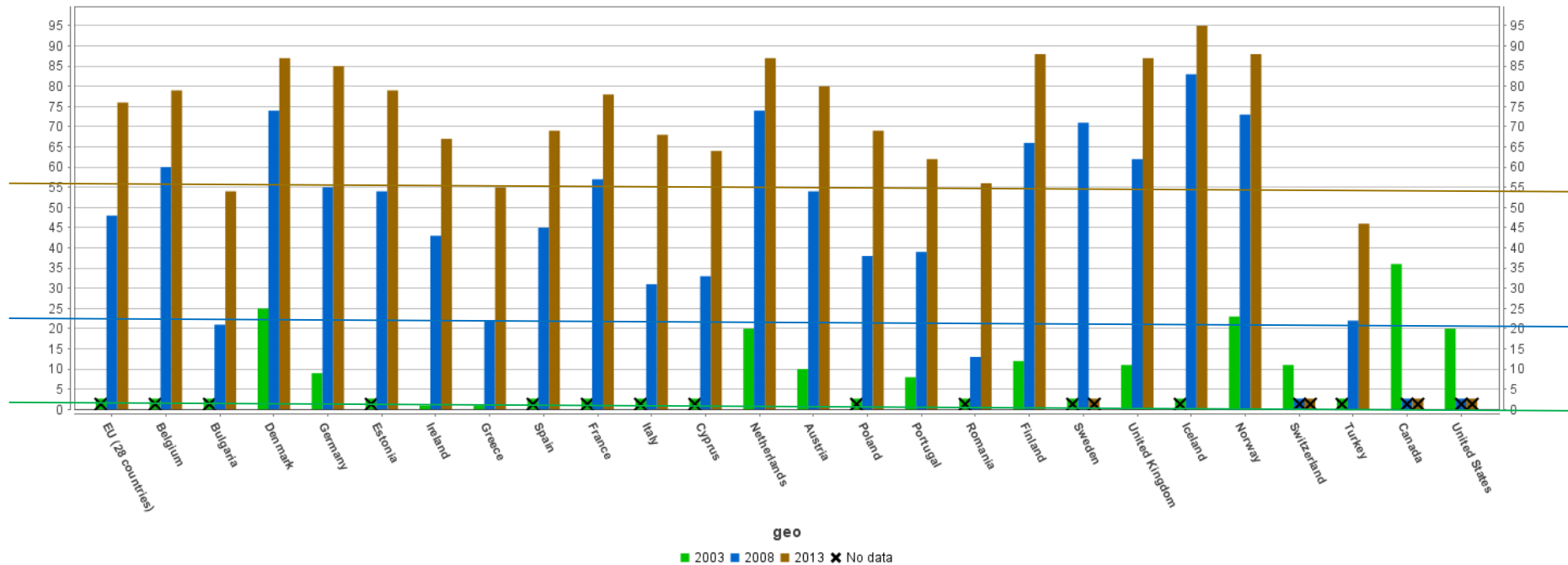
Not available



# Households having access to Internet

A rise from 1% to 55% percent the level of Internet access in households

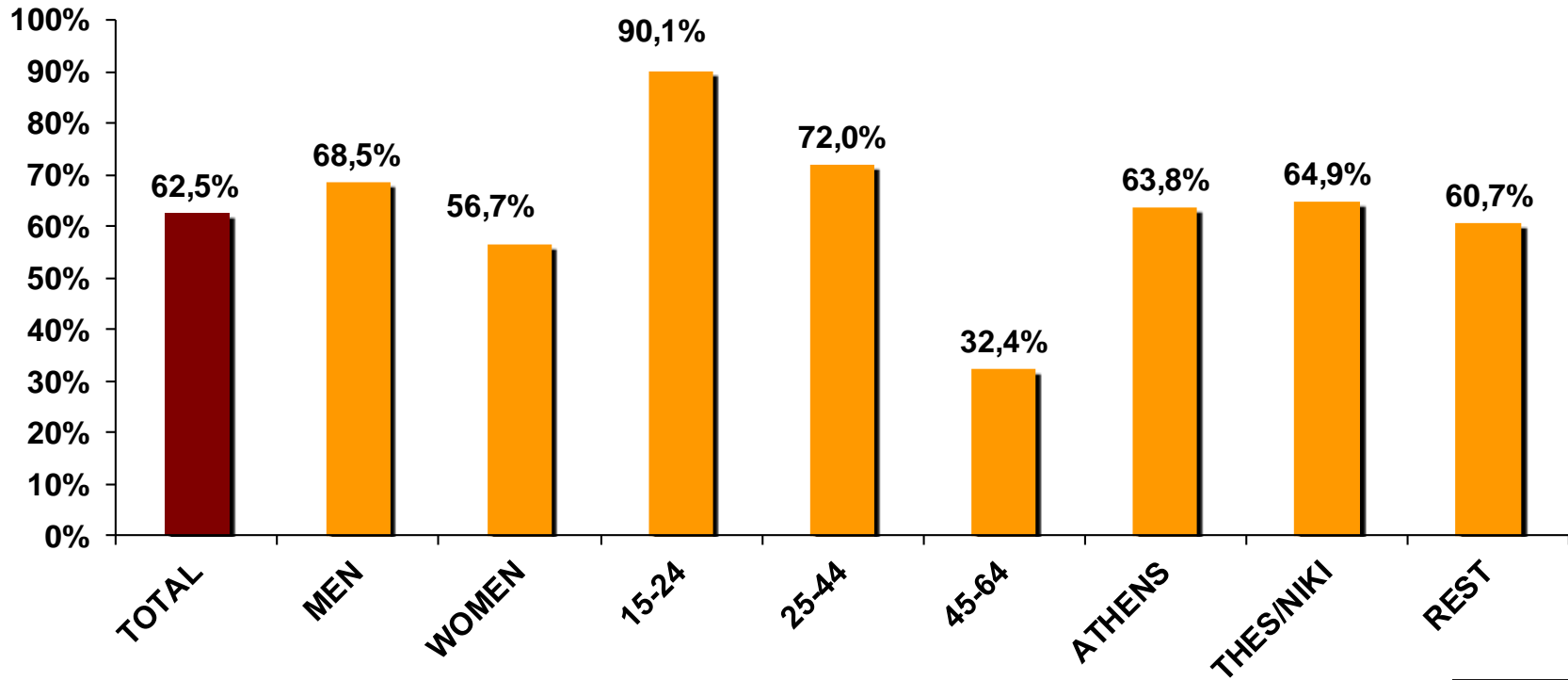
Source: EUROSTAT



Source: EUROSTAT



# Demographics



Base: Total population 5-64  
Source: TGI 2014

# Medium

	TOTAL	MEN	WOMEN	15-24	25-44	45-64	ATHENS	THES/NIKI	REST
PC DESKTOP/ LAPTOP	95,4%	96,3%	94,3%	94,2%	95,9%	96,0%	95,0%	95,1%	95,9%
MOBILE/ TABLET	25,9%	26,8%	24,8%	40,7%	22,8%	9,1%	20,0%	32,0%	30,4%
OTHER	9,0%	9,0%	8,9%	8,8%	9,5%	7,7%	1,8%	17,1%	14,2%

Base: Total population 15-64  
Source: TGI 2014

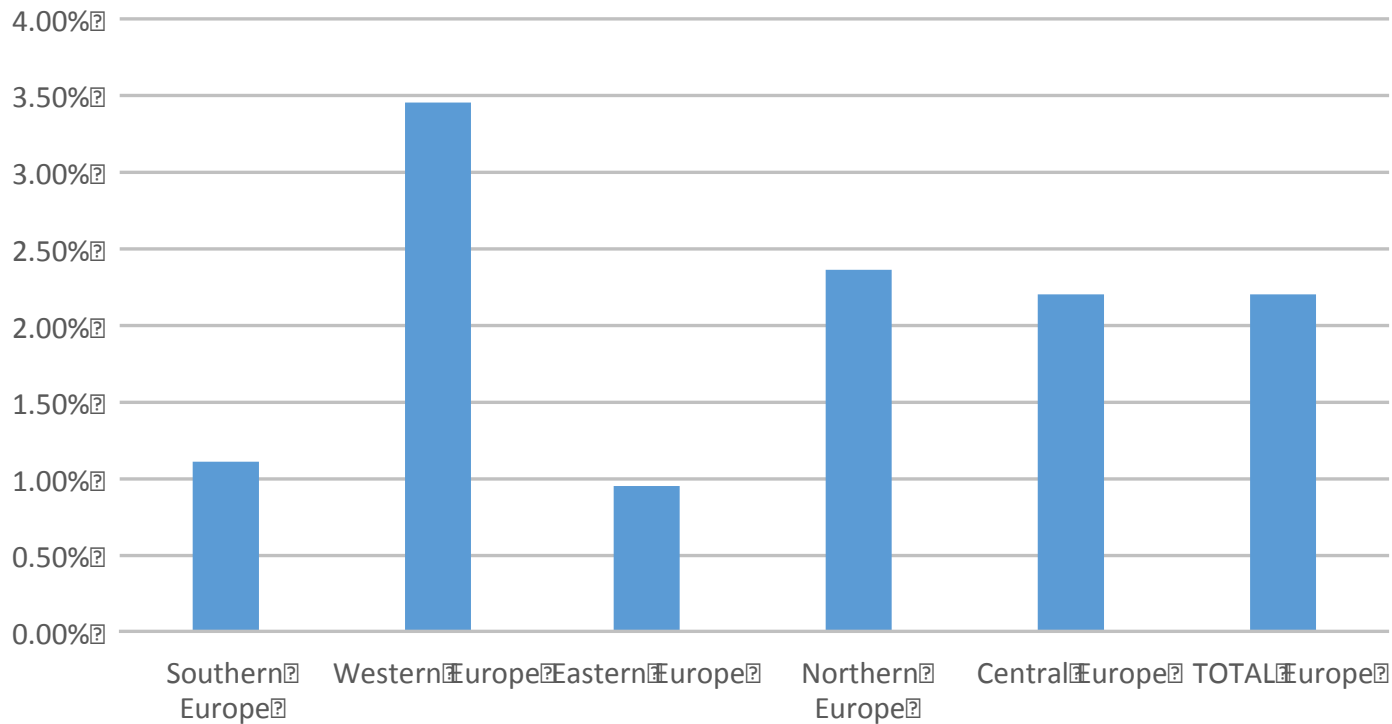




# eCommerce

# eCommerce turnover / GDP

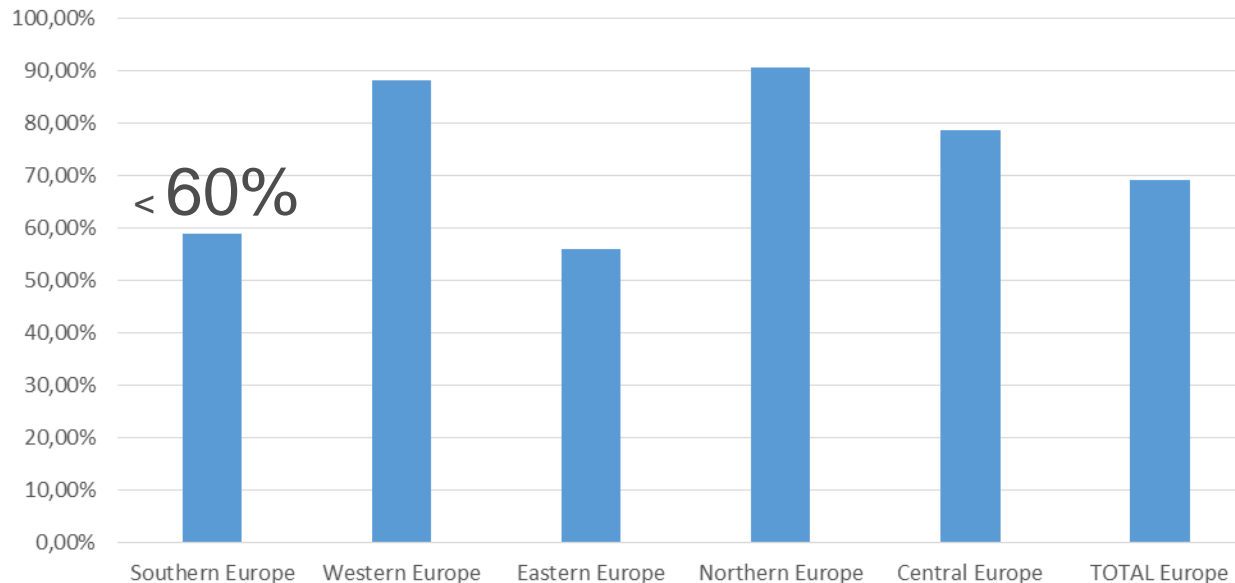
Southern Europe eCommerce sales @ 1,11% of GDP (vs 2,21% in Europe)



Source: Partially based data from European B2C E-commerce Report 2014, eCOMMERCE EUROPE

# Percentage of Internet Users

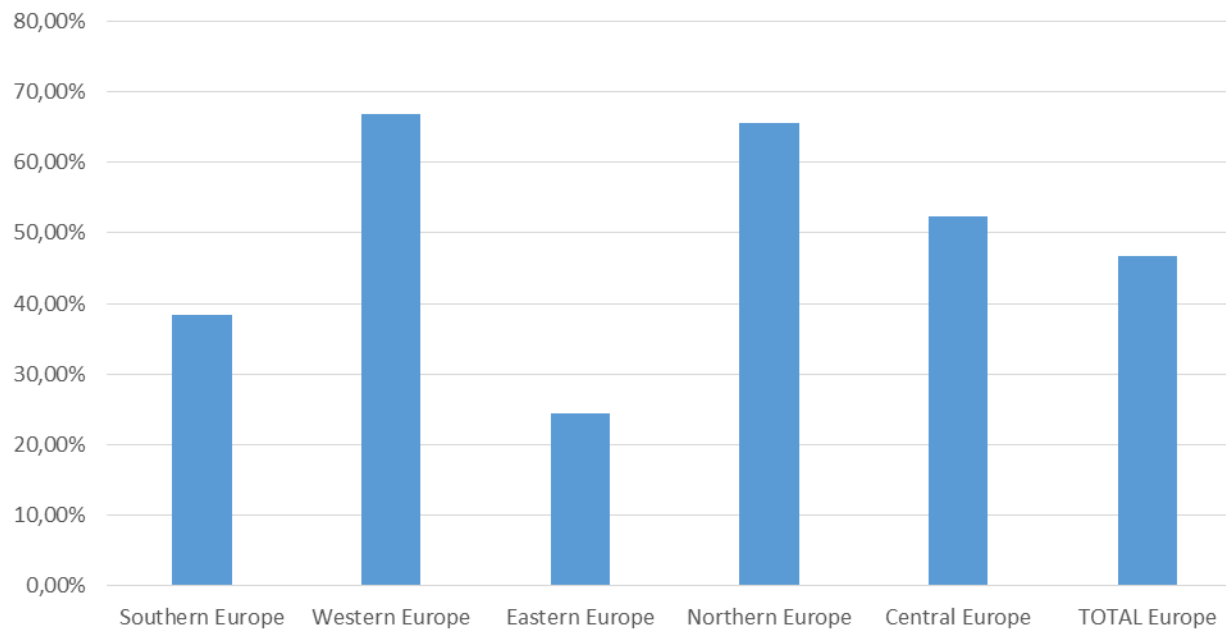
59% Internet Penetration in Southern Europe (vs 69% in Europe)



*Partially based data from European B2C E-commerce Report 2014,  
eCOMMERCE EUROPE*

## eCommerce / Internet Users ratio

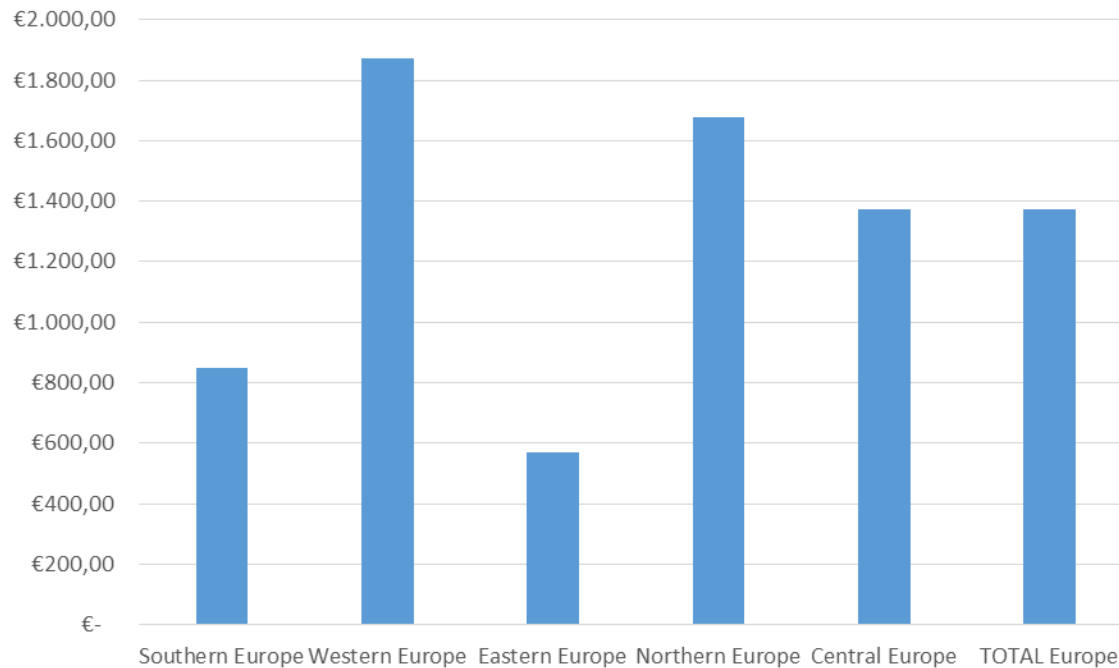
38,4% of Internet users in Southern Europe buy online (vs 46,7% in Europe)



*Partially based data from European B2C E-commerce Report 2014,  
eCOMMERCE EUROPE*

# eCommerce spending per user

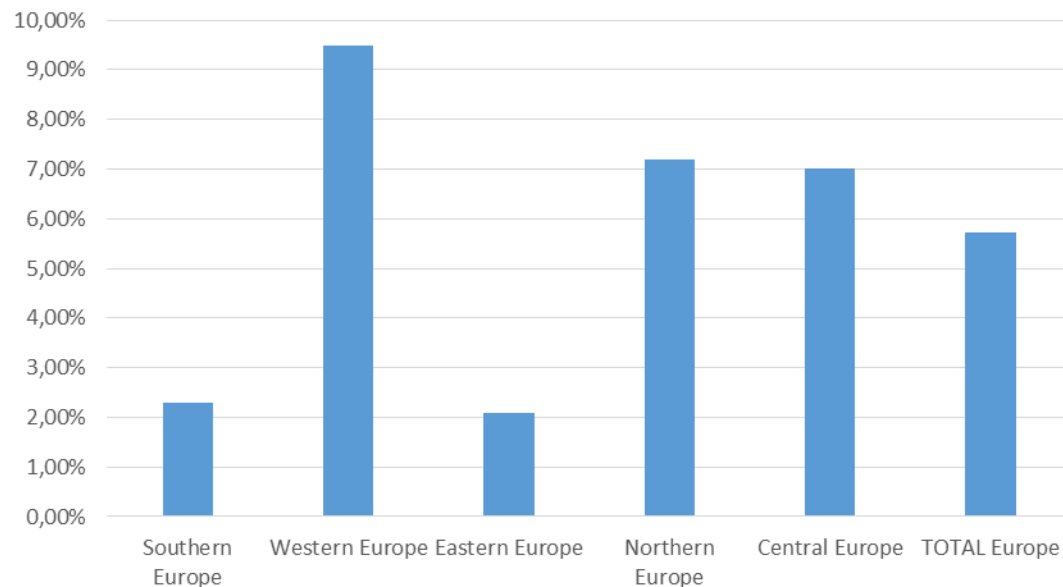
Average spending of eCommerce users in  
Southern Europe: 850€ (vs 1350€ in Europe)



*Partially based data from European B2C E-commerce Report 2014,  
eCOMMERCE EUROPE*

# Online as part of total retail

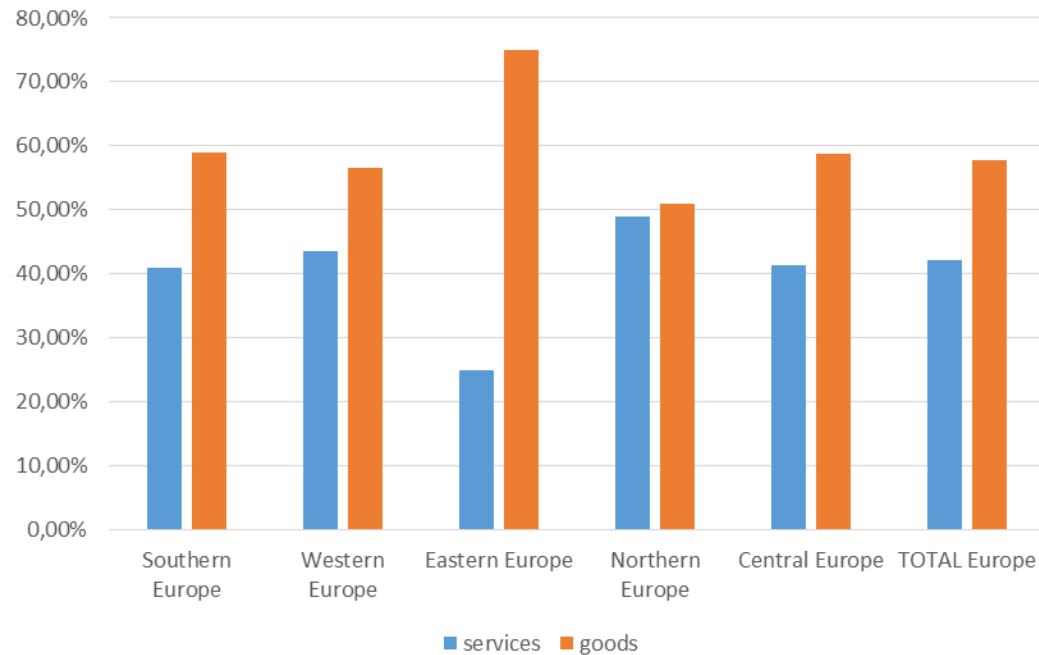
2,3% of total retail is made over Internet in Southern Europe (vs 5,73% in Europe)



*Partially based data from European B2C E-commerce Report 2014,  
eCOMMERCE EUROPE*

# Goods vs. Services

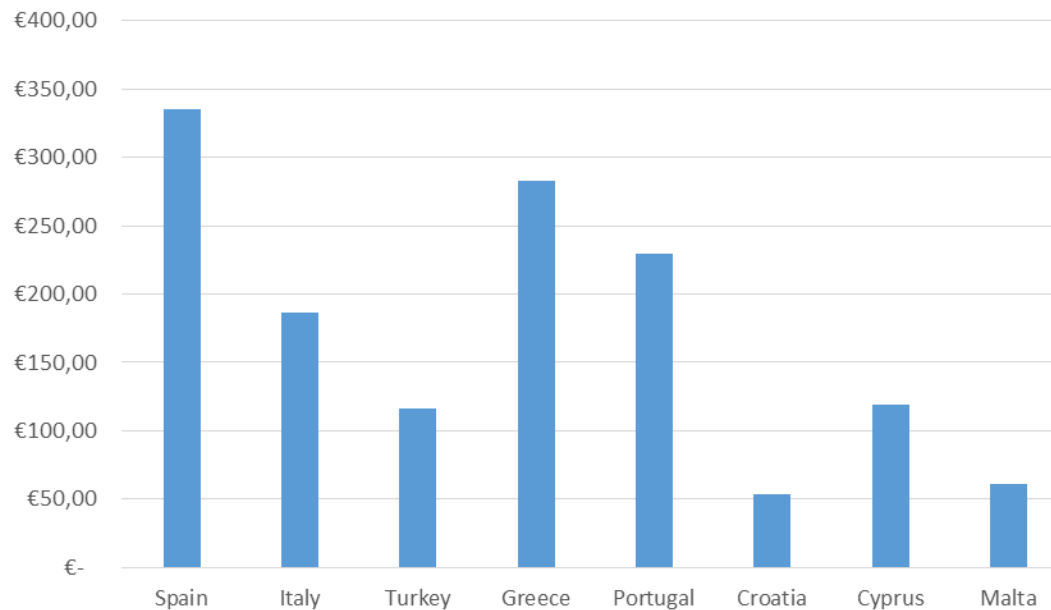
Southern Europe services/goods 4:6



*Partially based data from European B2C E-commerce Report 2014,  
eCOMMERCE EUROPE*

# Spending per capita in Southern Europe

Including the total country population

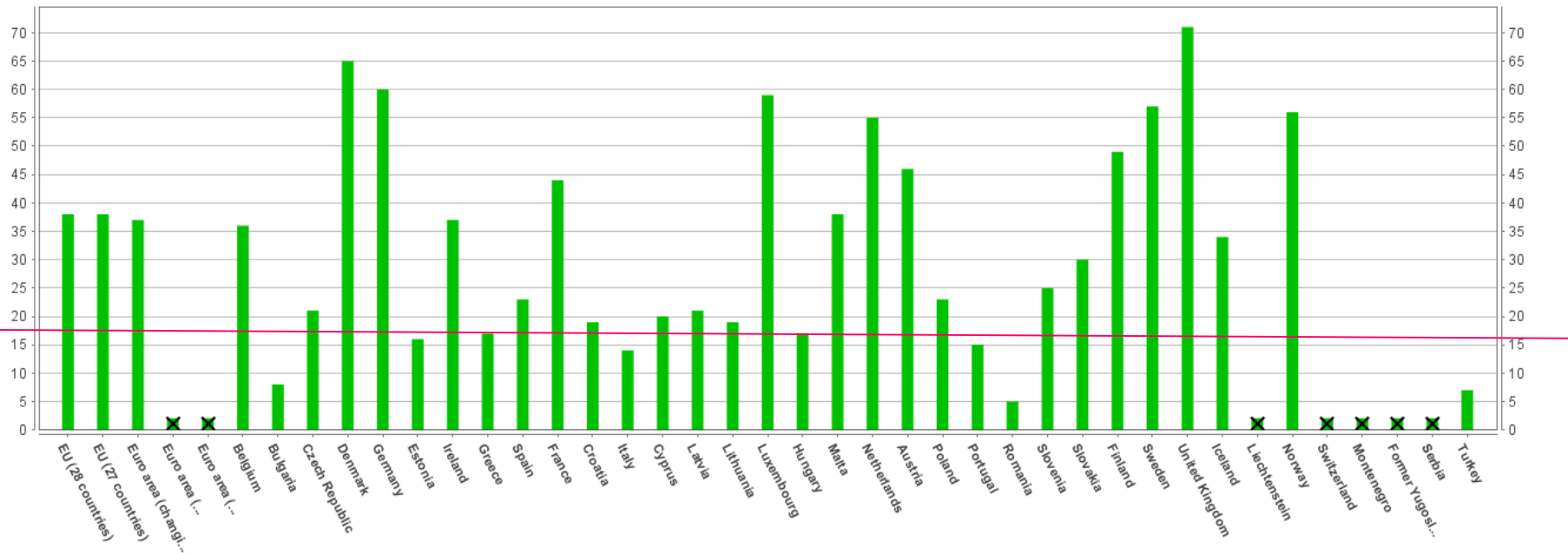


*Partially based data from European B2C E-commerce Report 2014,  
eCOMMERCE EUROPE*





# Individuals purchased goods/services over the past 3 months



Source: EUROSTAT

# B2C eCommerce Sales Growth in EU



Countries	2010	2011	2012	2013	2014(f)
<b>Russia</b>	29.7%	29.2%	32.7%	<b>50.5%</b>	16.1%
<b>Ukraine</b>	88.1%	45.3%	47.1%	<b>48.0%</b>	21.6%
<b>Turkey</b>	N/A	57.4 %	35.9%	<b>35.0%</b>	12.3%
<b>Romania</b>	30.7%	41.2%	33.3%	<b>30.0%</b>	15.4%
<b>Germany</b>	17.3%	16.7%	21.7%	<b>26.8%</b>	20.6%
<b>Greece</b>	50.0%	50.0%	42.2%	<b>25.0%</b>	18.8%
<b>Poland</b>	24.2%	33.3%	24.9%	<b>24.9%</b>	19.0%
<b>Baltic States</b>	32.1%	36.1%	26.1%	<b>23.3%</b>	13.4%
<b>Ireland</b>	24.6%	25.1%	25.0%	<b>21.1%</b>	15.0%
<b>CZ Republic</b>	27.8%	15.3%	19.6%	<b>20.0%</b>	13.4%
<b>Hungary</b>	30.9%	9.9%	35.5%	<b>20.0%</b>	17.3%
<b>Sweden</b>	13.6%	12.0%	12.5%	<b>19.4%</b>	8.1%
<b>Italy</b>	17.4%	19.2%	18.4%	<b>17.8%</b>	18.2%
<b>Belgium</b>	13.0%	25.0%	38.3%	<b>16.5%</b>	15.0%
<b>Denmark</b>	25.0%	15.0%	18.9%	<b>14.0%</b>	10.9%
<b>France</b>	24.0%	21.6%	19.4%	<b>13.6%</b>	12.5%
<b>Portugal</b>	13.3%	17.7%	15.0%	<b>13.0%</b>	13.0%
<b>Switzerland</b>	23.8%	14.5%	15.5%	<b>12.1%</b>	10.8%
<b>Austria</b>	30.0%	29.2%	16.6%	<b>11.9%</b>	8.2%
<b>United Kingdom</b>	18.0%	15.9%	14.3%	<b>11.4%</b>	18.8%
<b>Spain</b>	17.4%	19.8%	18.8%	<b>11.1%</b>	16.8%
<b>Norway</b>	18.4%	9.4%	8.6%	<b>8.5%</b>	9.4%
<b>Netherlands</b>	10.7%	9.3%	8.6%	<b>8.5%</b>	9.5%
<b>Finland</b>	10.1%	17.5%	2.2%	<b>5.9%</b>	6.1%

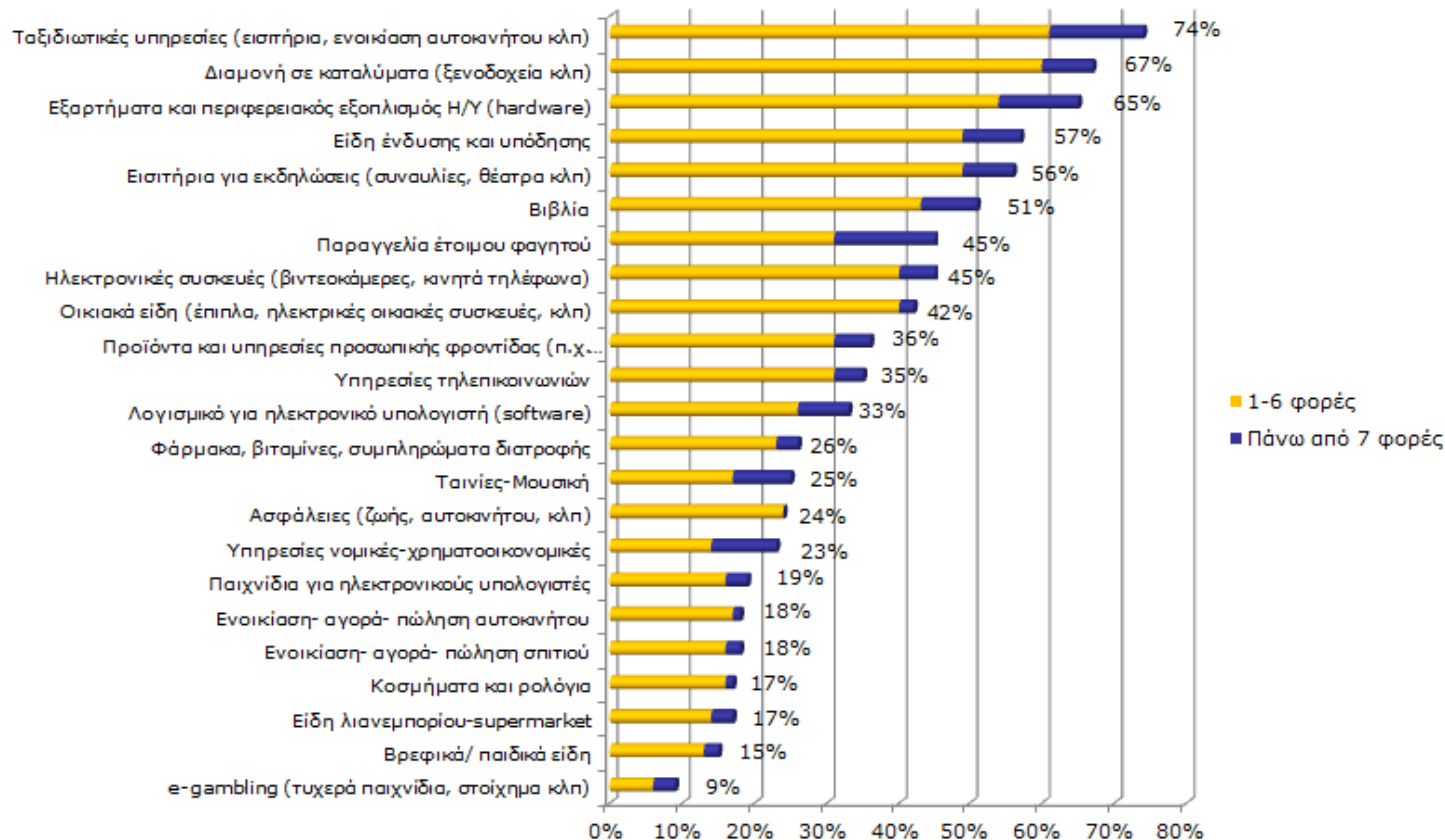
Source: Ecommerce Europe, 2014





# eCommerce B2C purchases in Greece

Πόσες φορές αγοράσετε μέσω Internet το Α' Ενεάμηνο του 2013 τα παρακάτω προϊόντα/ υπηρεσίες;



Source: ELTRUN



# eCommerce barriers and the way forward



eShops

customers

IT agencies



# Broadband access is no longer an issue







# Change the eCommerce mentality

- Educate the customers
- Make them feel secure





# Going global while staying local

- Market size is small, the only way is to sell abroad
- Multichannel selling





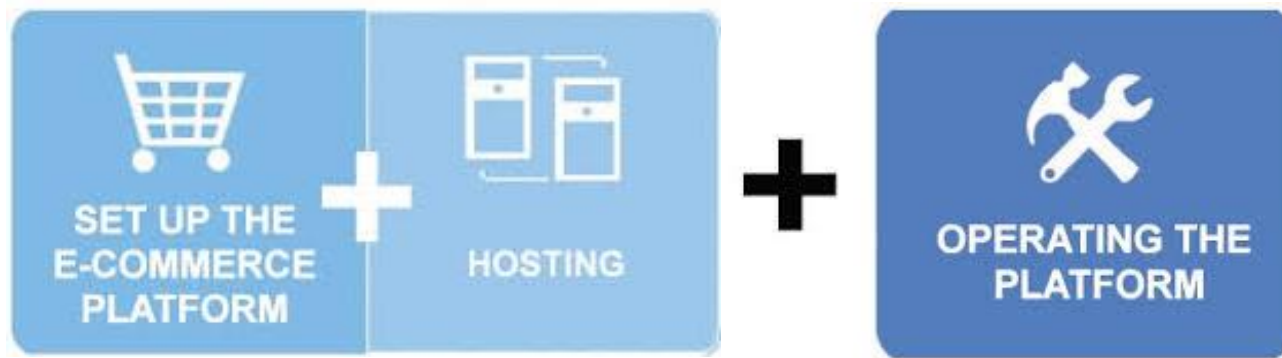
## Courier Services

- Need of regulatory framework & competition
- Faster delivery required



# CAPEX and OPEX of running an eShop

- how much would you invest for your shop?
- Running an eShop requires resources



# IT products & services

- higher quality is require



# eCommerce considerations for customers

- Security & reliability
- Lower prices compared to physical shops
- Mobile stores are most convenient to shop for almost a 89% in the US
- Comparable with international eShops
- Instant gratification



# eCommerce considerations for merchants

- Running an eShop with positive P&L
- Be competitive and sell abroad
- Peace of mind with the infrastructure (eShop, ERP, etc)



# eCommerce considerations for agencies

- “*Everyone does everything*” has no future
- Building infrastructures should not be just a price contest
- Business continuity of solutions should be guaranteed

## designer

User Interface Designer with a passion for designing beautiful and functional user experiences. Minimalist who believes that less is more.



## <coder>

Front End Developer who focuses on writing clean, elegant and efficient code. Love HTML5, CSS3, WordPress and a touch of jQuery.

```
<html>
height:184px;}
class="jedi">
CSS3 HTML5
color:#000;
jQuery
```



# Thank you

Converge ICT Solutions & Services SA  
74, Panormou  
11523 Athens  
Greece

Tel : +30 210 6971900  
Fax : +30 210 6985893

[www.converge.gr](http://www.converge.gr)  
[info@converge.gr](mailto:info@converge.gr)

@convergeICT