

State of Ecommerce Mind

Croatia & Slovenia 2017

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Zagreb, 05. 04. 2017





The Excitement
of the Moment



Shopper's Minds



State of
Ecommerce
Minds™ in focus



The Excitement of the Moment

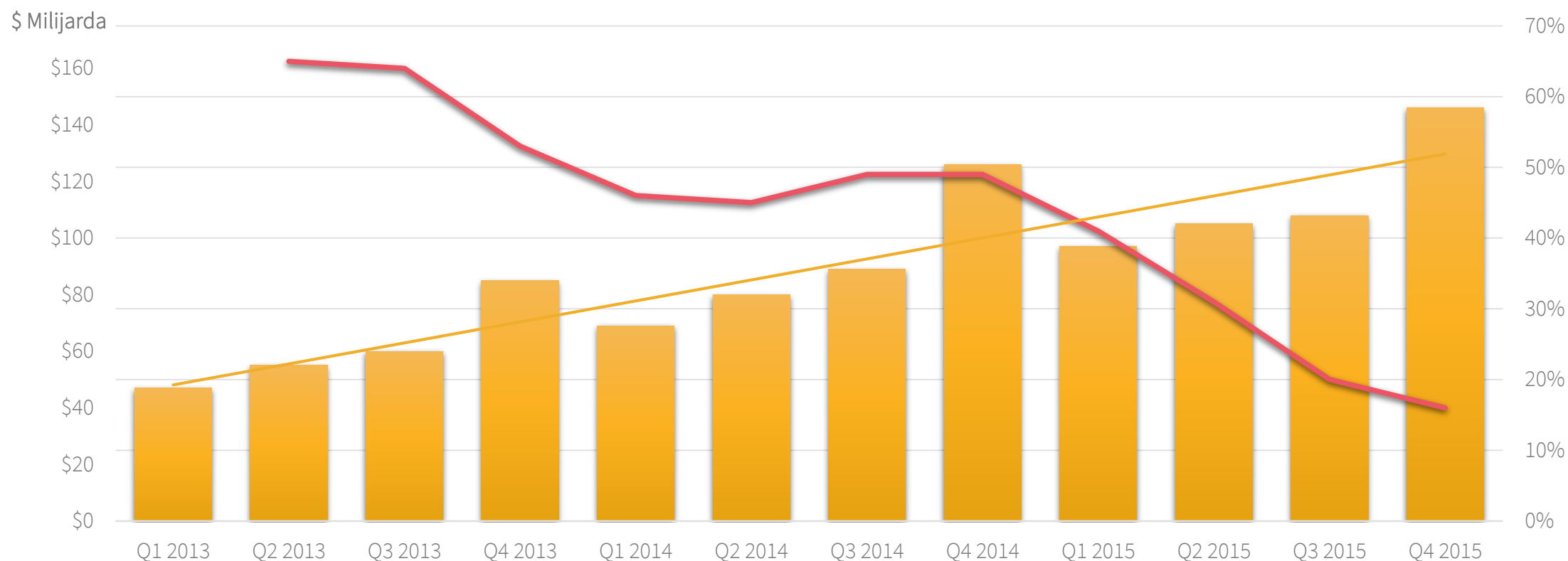


2017



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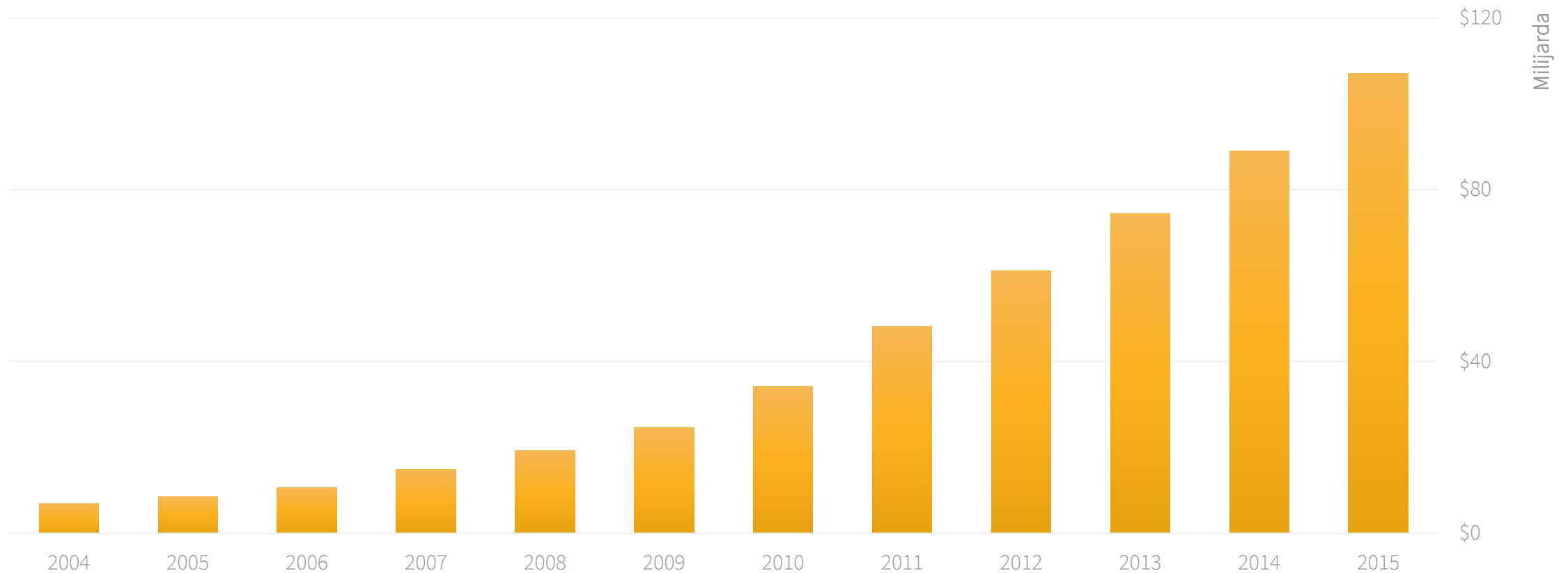
Global winners: Alibaba Gross Merchandise Volume - GMV



- Vir: iResearch

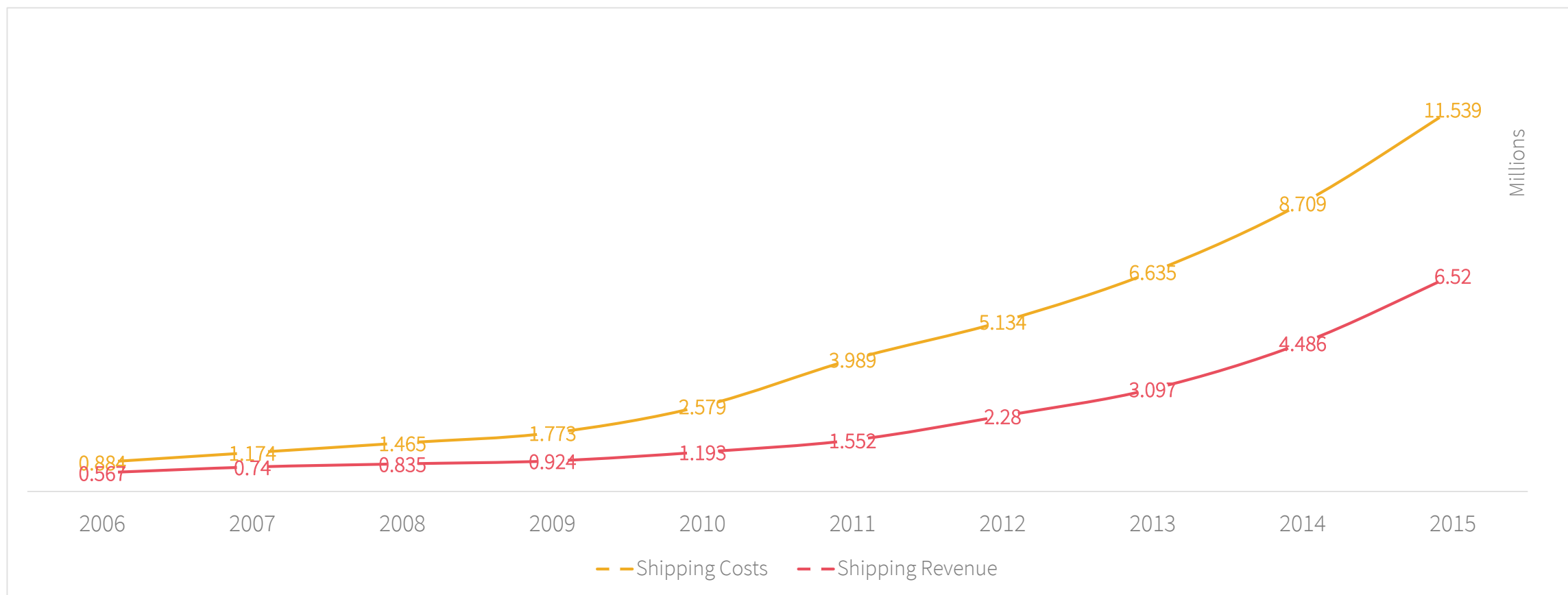
Is Amazon still the fastest growing retailer in US?

Net sales

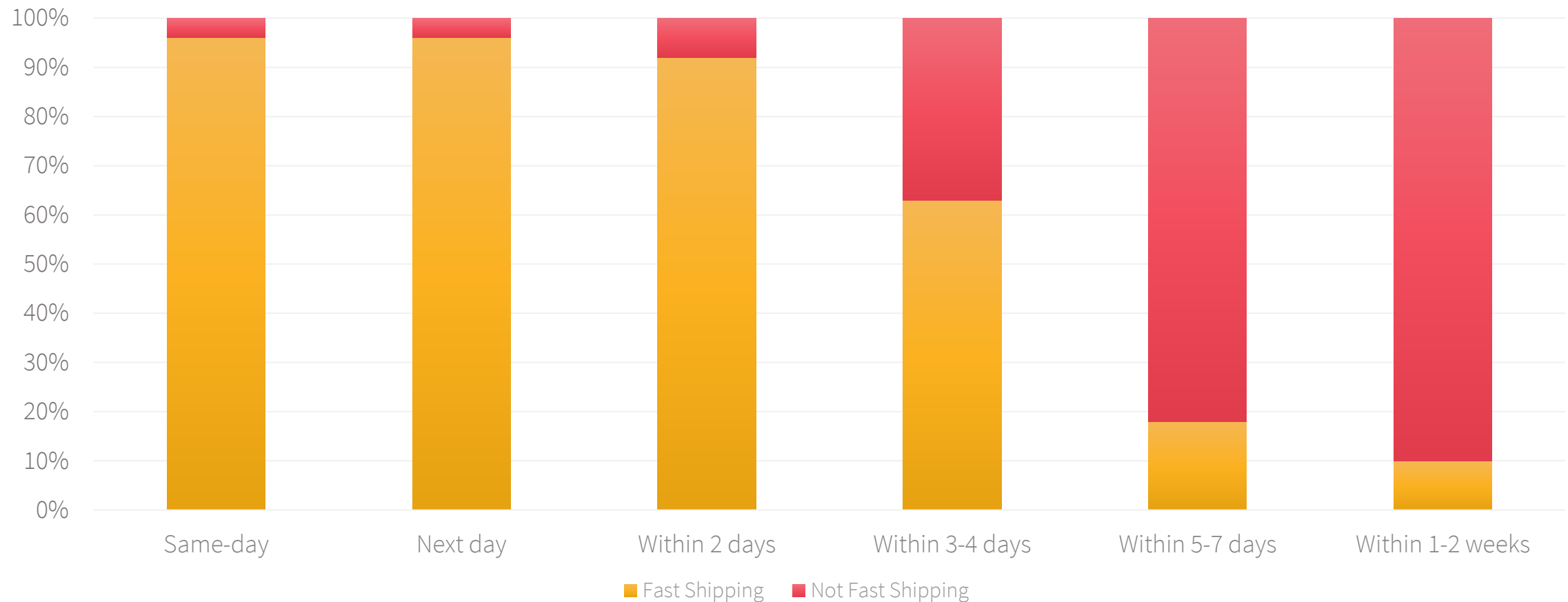


Vir: Amazon

Subscription delivery – **new business model or revenue hole** – costs of delivery and revenues for delivery - Amazon

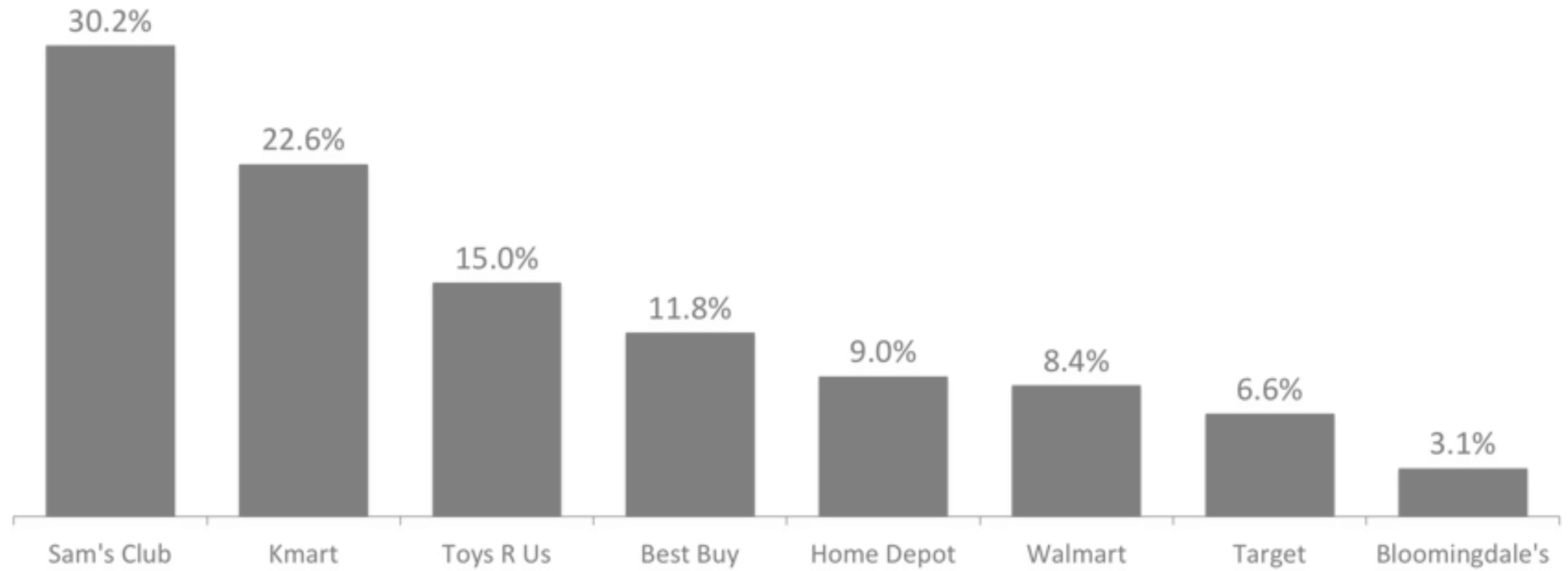


What is „fast delivery“ in customer minds



Click and collect – „your benchmark corner“

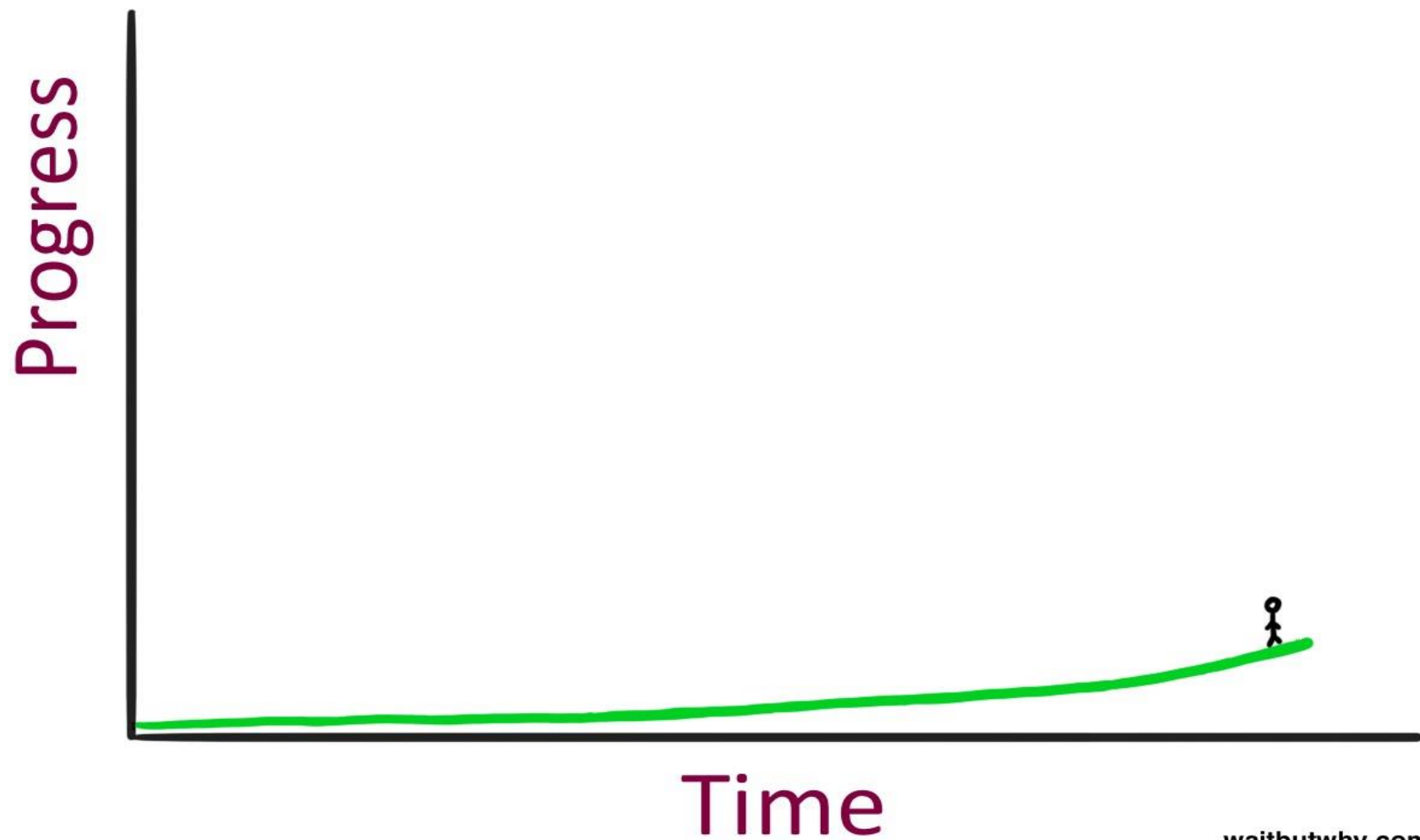
Share of online channel, retailer (2015)



**Shopper's Mind
reality**

**Five drivers of
growth**

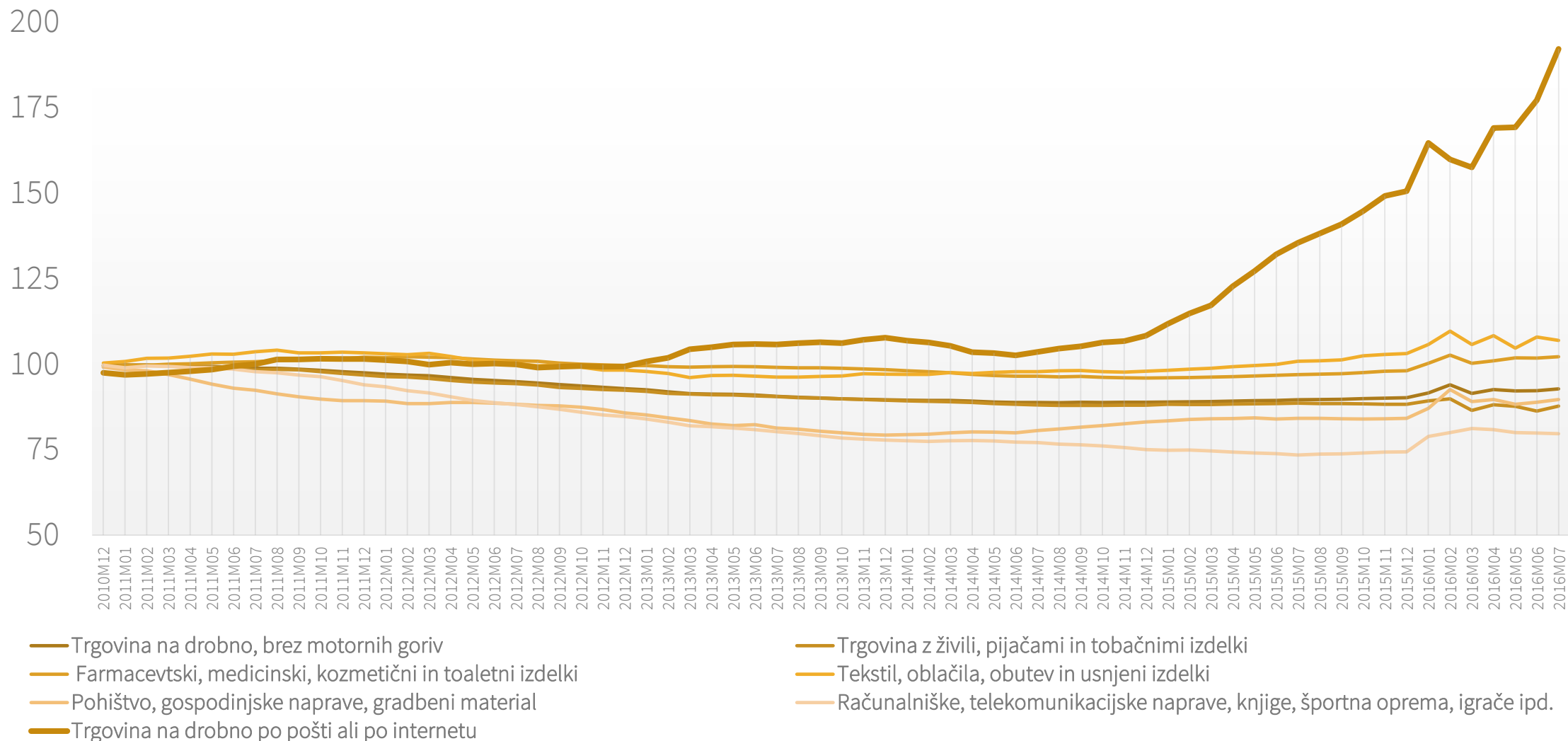






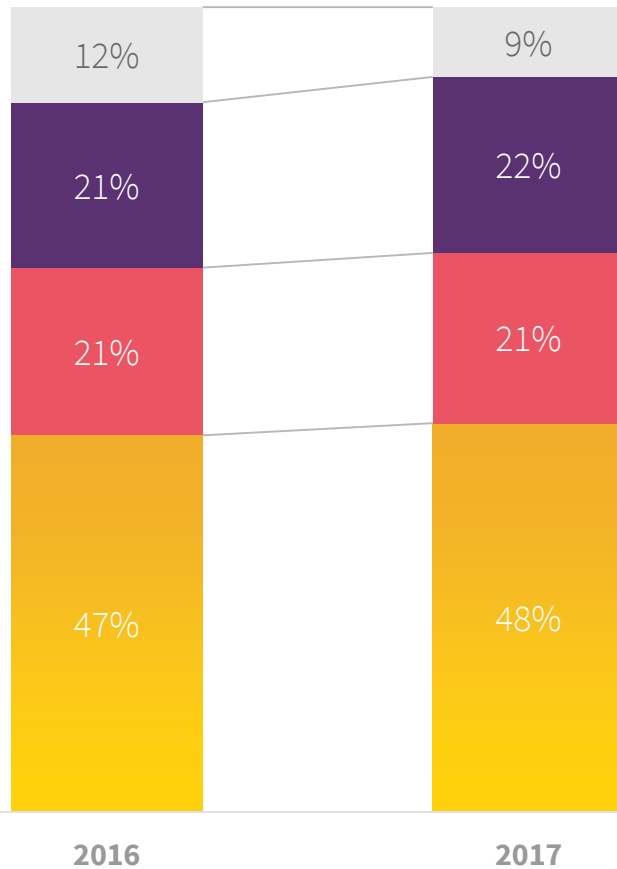
Hockey stick in Slovenia – the dynamics of the market

Croatia slowly shadow smaller neighbour state – projected CAGR till 2021 9%



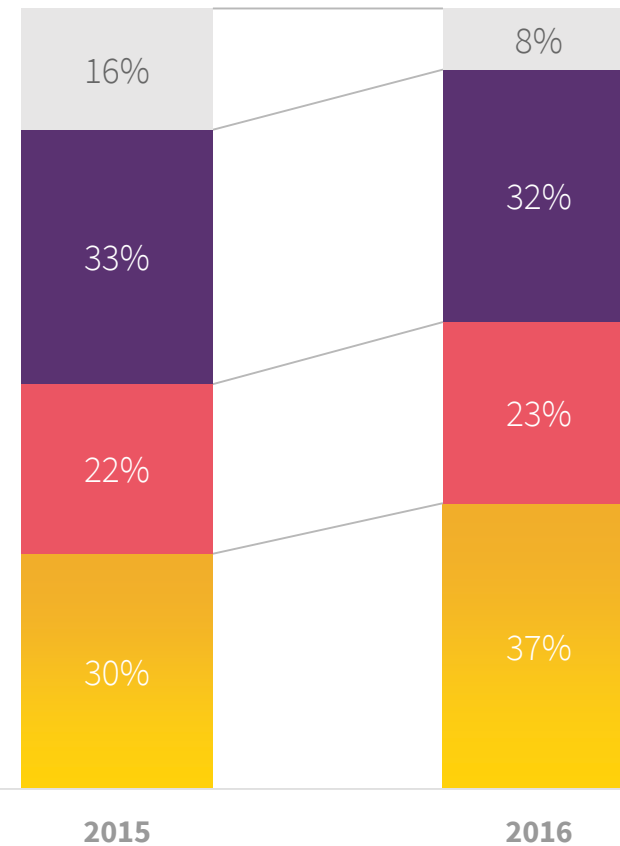
#1 Driver of ecommerce growth - Frequency

Frequency of online shopping
Croatia



■ never
■ seldom
■ regular
■ intensive

Frequency of online shopping
Slovenia



■ never
■ seldom
■ regular
■ intensive

#2 Driver of ecommerce growth – average purchase value

Croatia

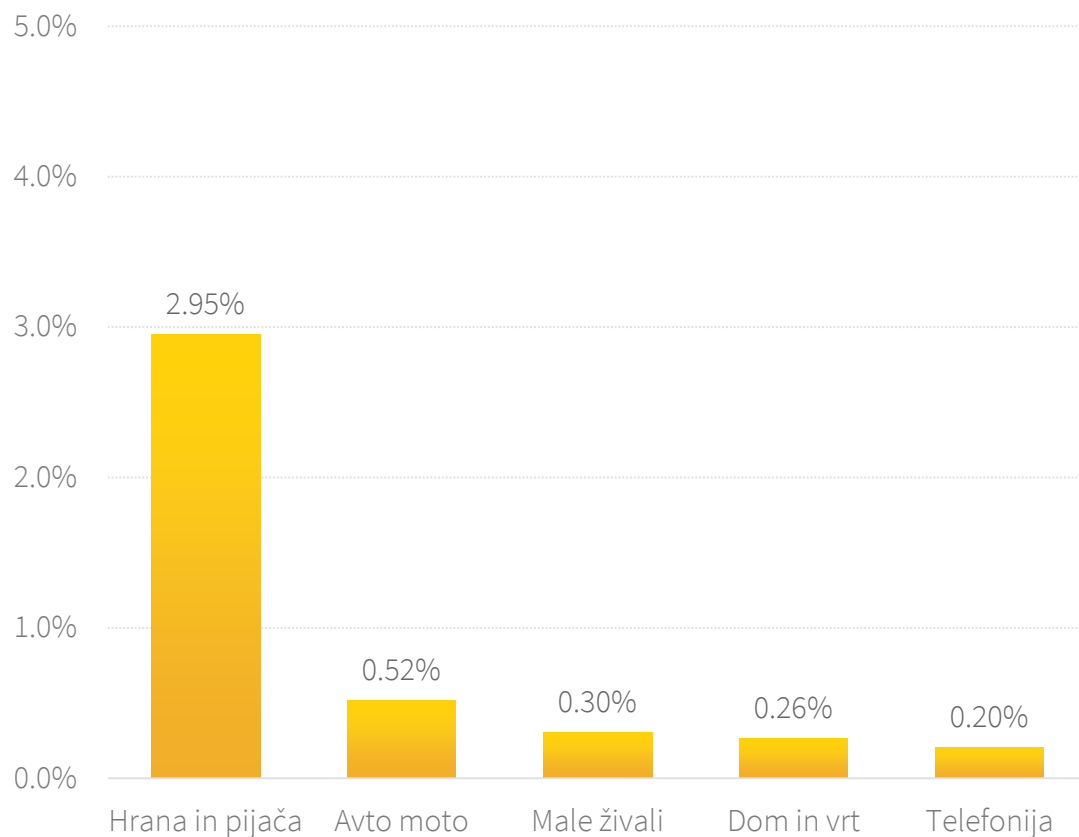
7,6%

Slovenia

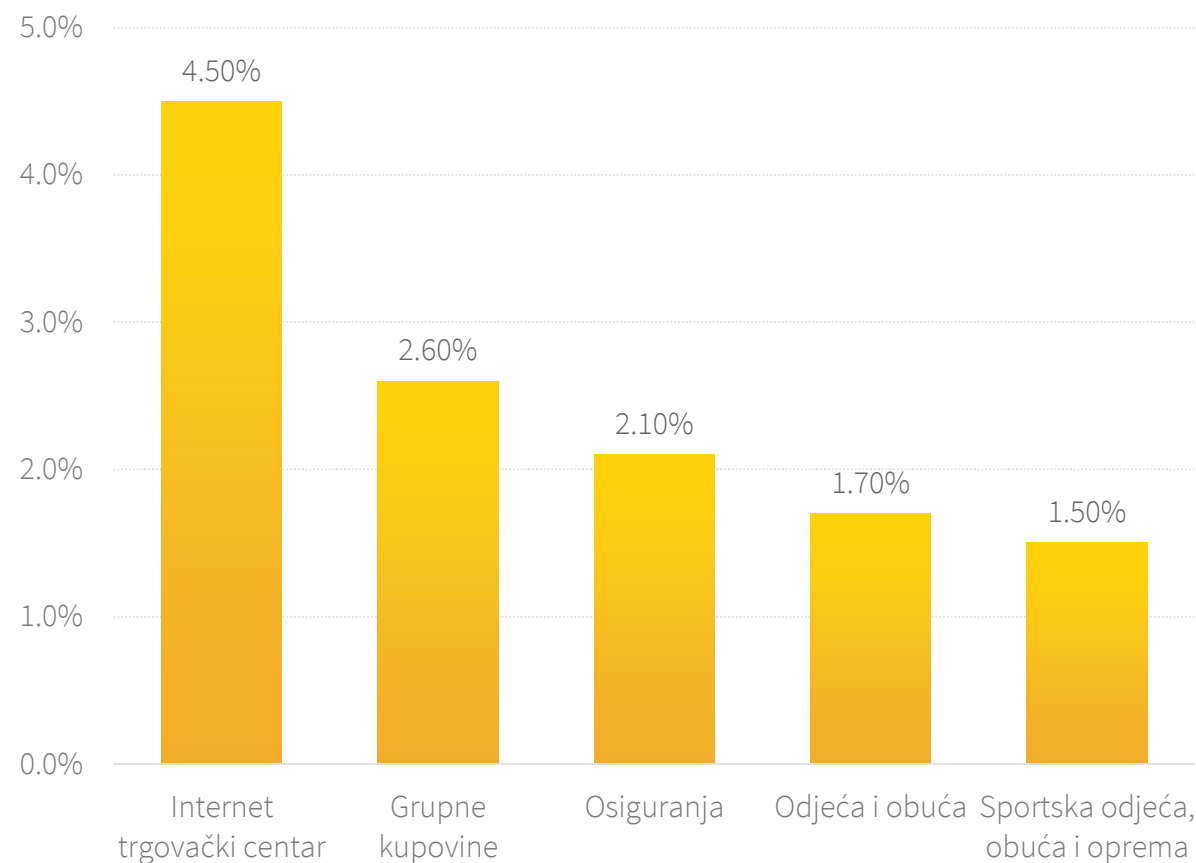
5,3%

#3 Driver of ecommerce growth – new web categories

Change in the market share 2015/2016 - Slovenia



Change in the market share 2016/2017 Croatia



#4 Driver of ecommerce growth – mobile - How ready we are?

Source: Shopper's Mind technical webstore compliance analysis

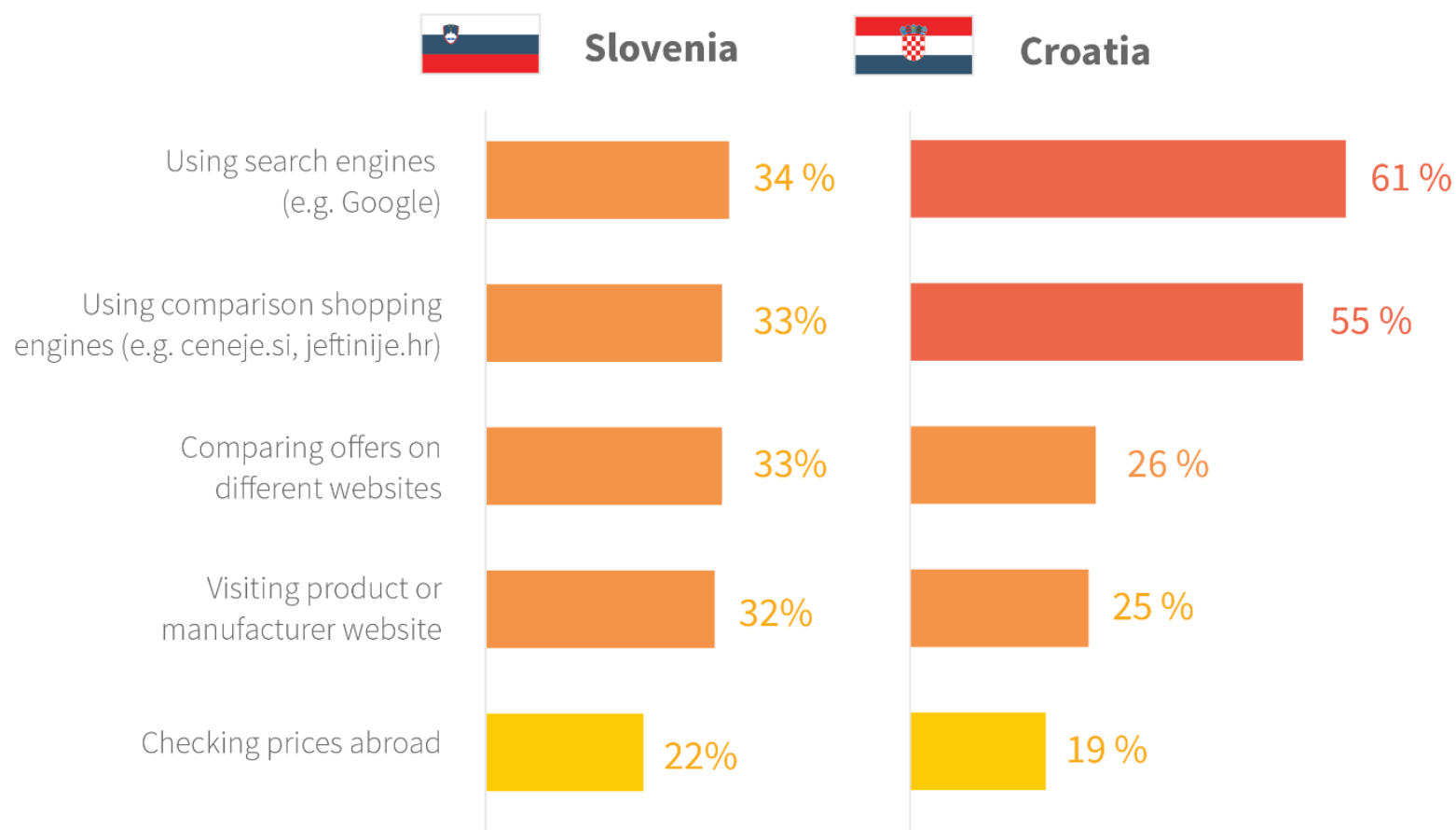
Cro₂₀₁₆ – 61%

Cro₂₀₁₇ – 87%



#5 Driver of ecommerce growth – consumer search

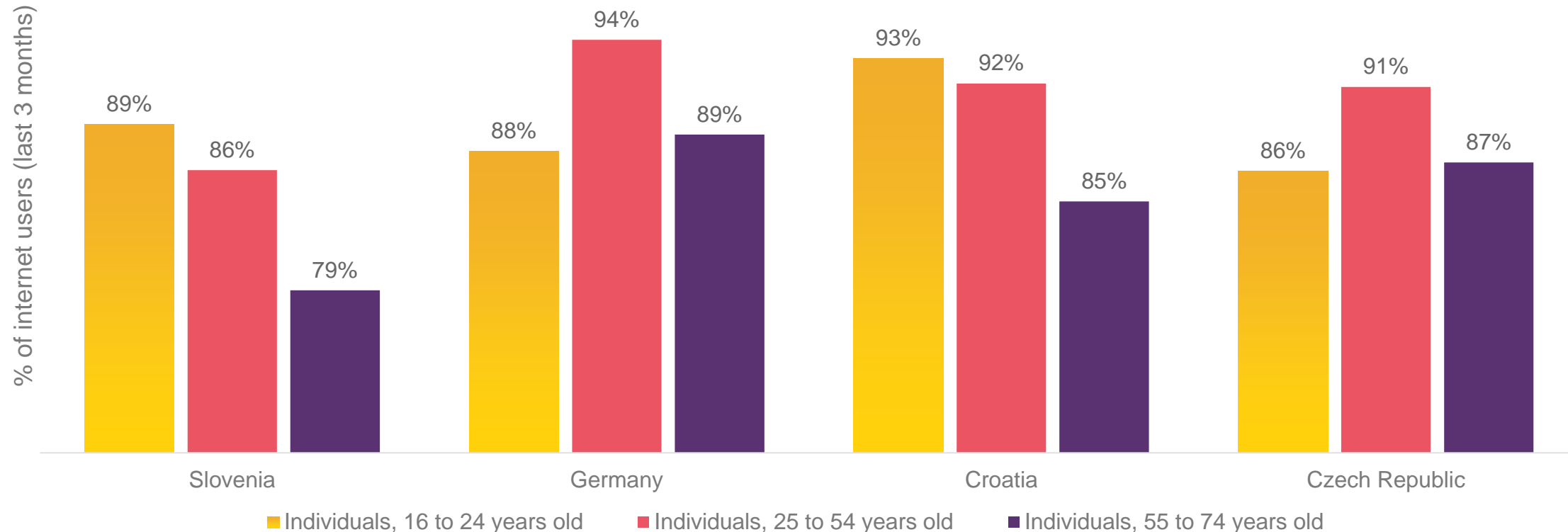
Online sources for researching offers before purchase





What they do to drive marketplace growth?

Looking for information about goods and services online, by Age 2016

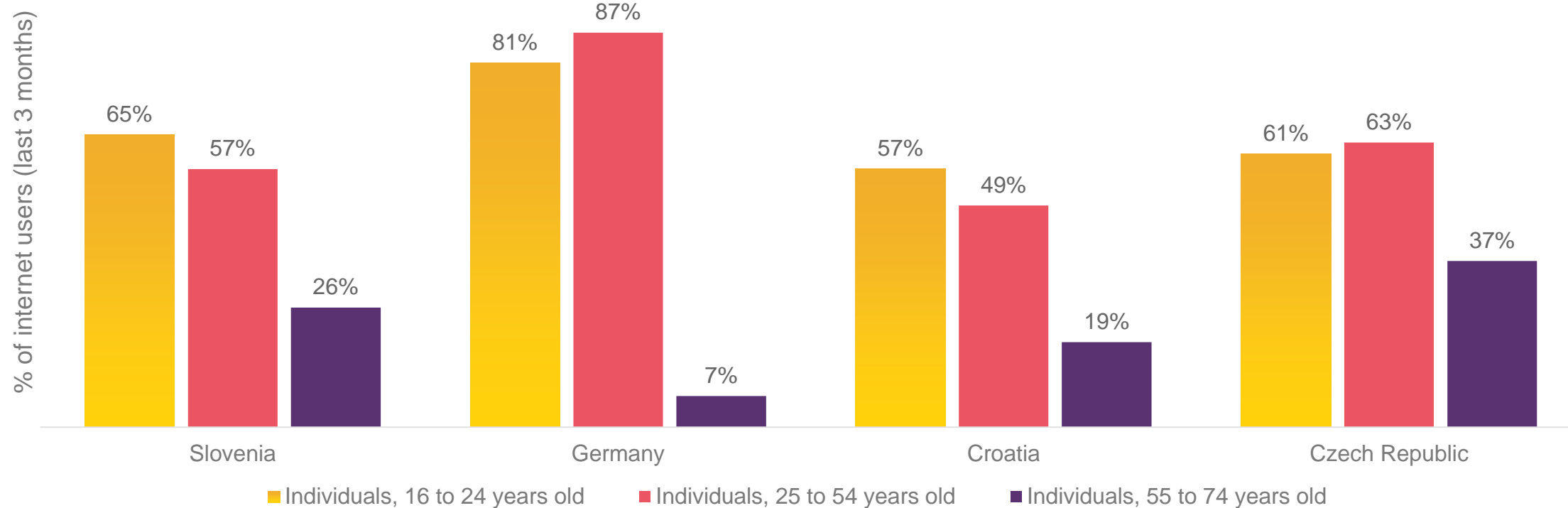


Source: [Raziskava Digital Agenda Scoreboard, Evropska komisija, 2015](#)

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In terms of online shopping there is still room for further growth

Individuals ordering goods or services online, by Age 2016



Source: [Raziskava Digital Agenda Scoreboard, Evropska komisija, 2015](#)

State of Ecommerce Mind Slovenia 2017 – available also in April 2017 for Croatia

To buy or not to buy on the web,...

Top 5 reasons to buy from a particular
web store:

- lowest price of the product
- payment method that suits me
- the best offer in general
- attractive special offers
- fast delivery



To buy or not to buy on the web,...

Top 5 reasons not to shop online:

- I prefer to go to the physical store and see the product
- I don't want to share my personal data/credit card number online
- I don't trust online shopping / I have doubts about security of online shopping
- I am worried about misuse of credit cards
- I don't want to shop online



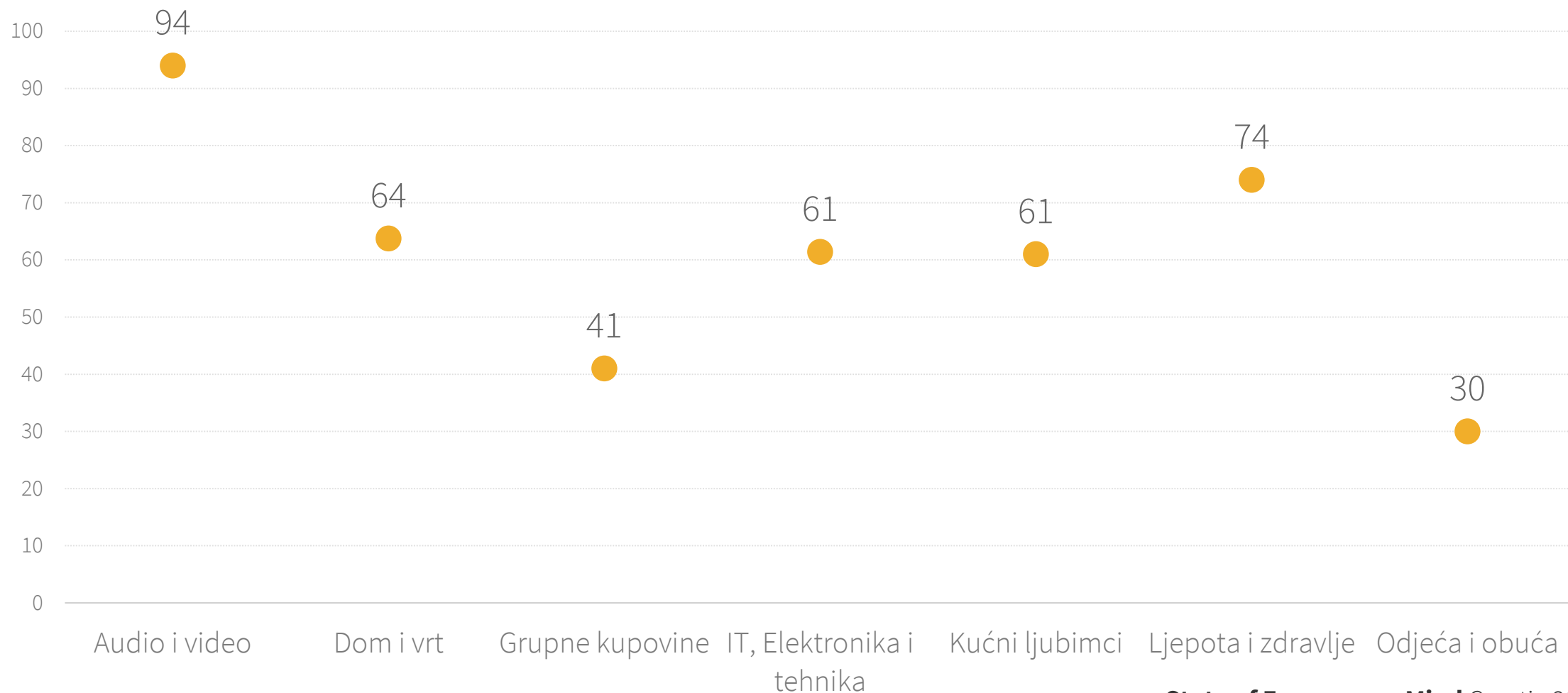
Consumer attitudes towards different categories Croatia

Net Promoter Score (NPS) by ecommerce site type



Consumer attitudes towards different categories Croatia

Net Promoter Score (NPS) by ecommerce site type

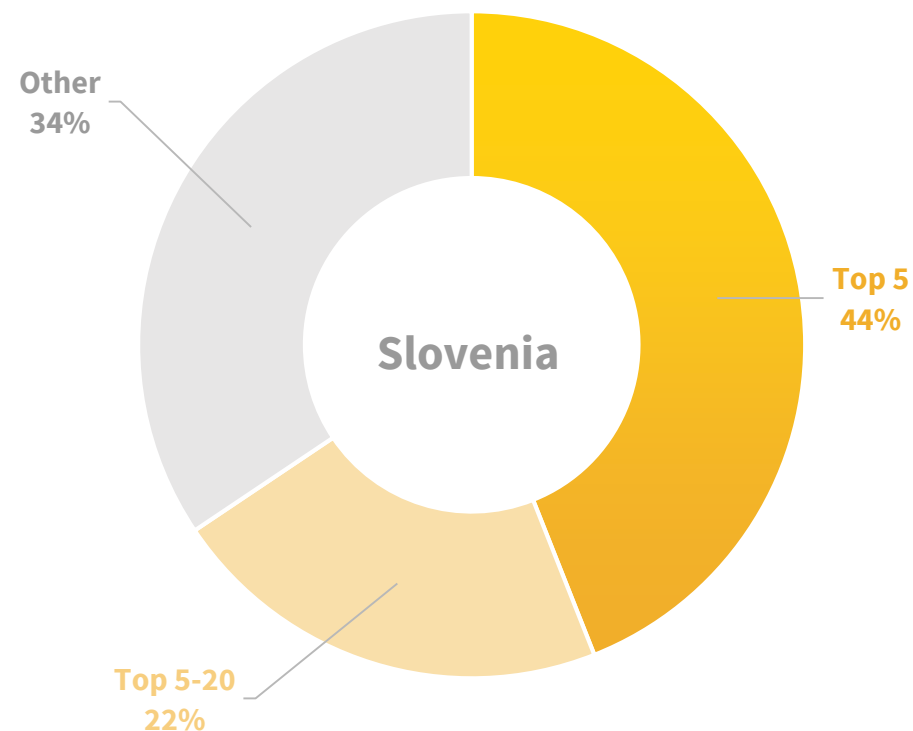
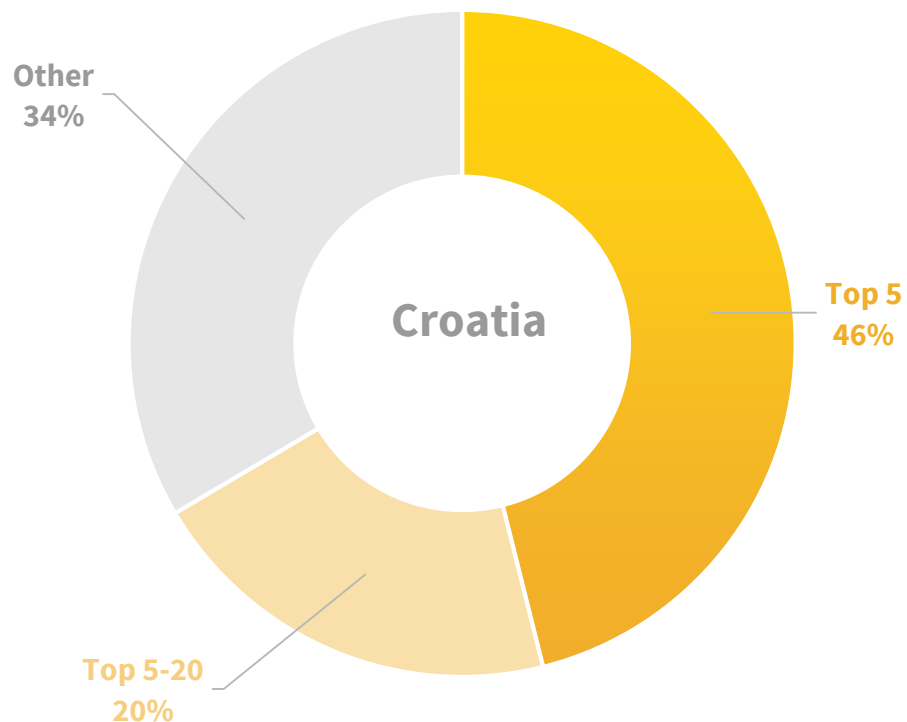


State of Ecommerce Minds™ in focus





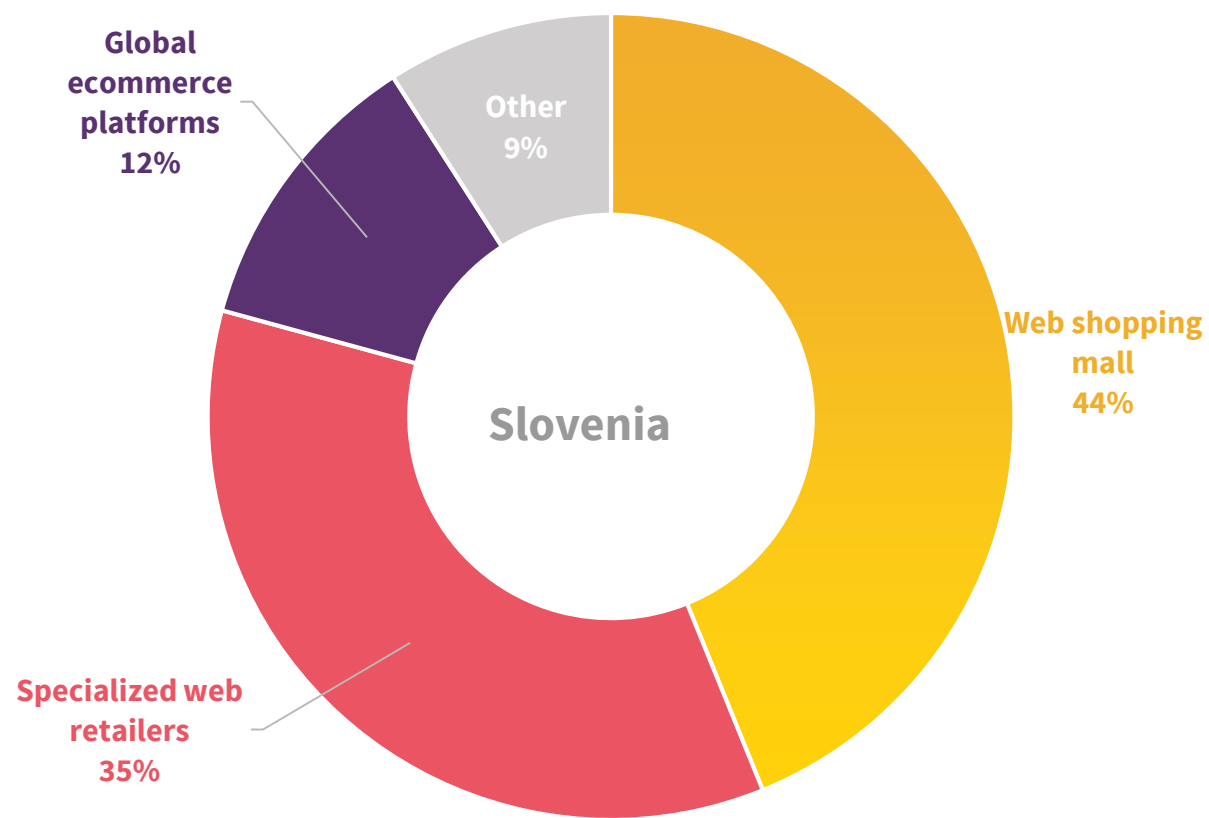
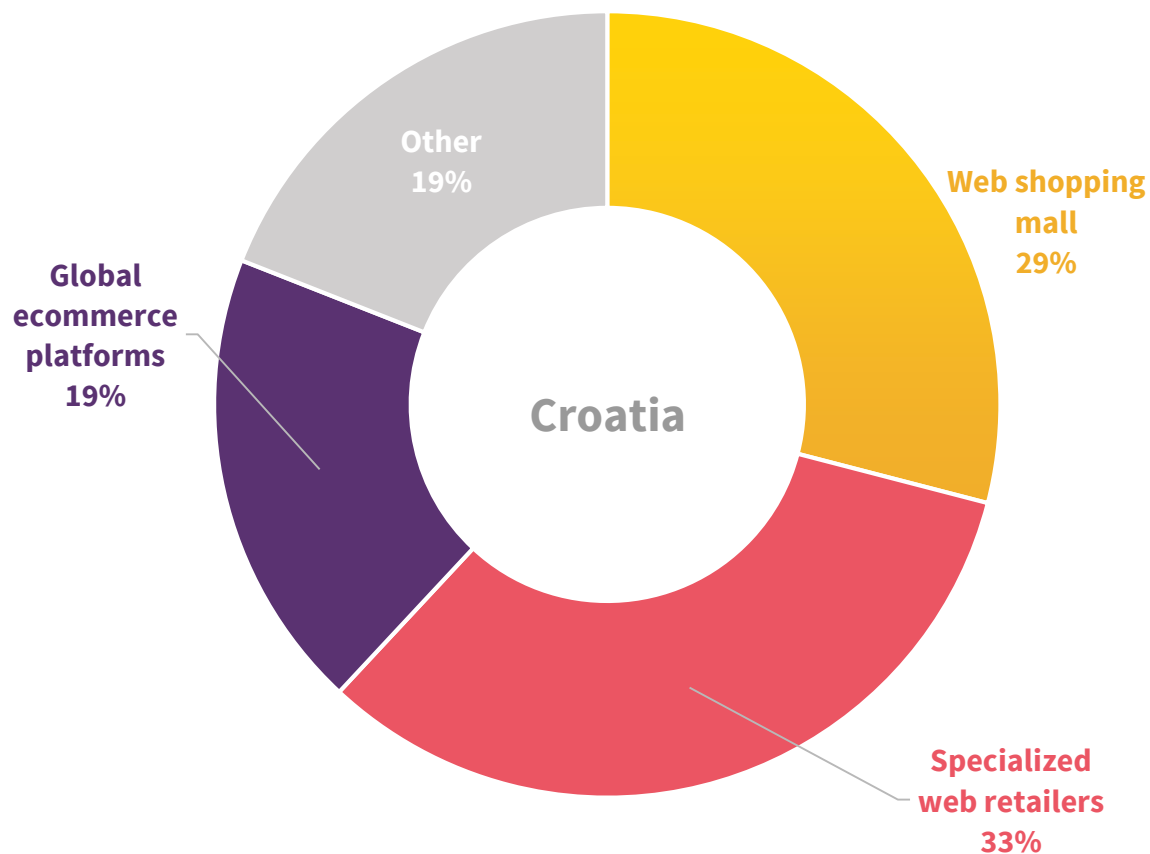
Ecommerce competitiveness - market stats – Croatia & Slovenia



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available also in April 2017 for Croatia



Share by ecommerce segment – Croatia and Slovenia



Dynamic view of ecommerce segment – Croatia and Slovenia

Most of my purchase on the web I do in cross border

Slovenia: 18% (=)
Croatia: 38% (=)

I only shop in domestic web stores

Slovenia: 47% (=)
Croatia: 22% (↓)



Technology

Traffic

Transparency

Trust



„404 – page not found“

Hvala.

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