

Through the Eyes of Consumers

Exclusive Survey for APPLiA 2024 Conference

We will see...



Greeks and Technology



Tips & Tops of Greek Society
Today



The Market of
Electrical Appliances

My sources

Focusontechlife
web

- Records Greeks' relationship with technology since 1995
- CATI interviews
- Annual sample 20.000

YouGovProfiles
by  **FocusBari**

- Continuous National online survey
- A wealth of habits, attitudes, lifestyles, exposure to media and a series of attitudinal statements regarding a variety of subjects
- Annual sample 8.500+

Exclusive Conference Survey

- Quantitative national survey
- Universe : Adults 18-64
- Sample : 1003 άτομα
- Fieldwork : February 9-11, 2024
- Fully structured questionnaire
- YouGov Online Panel (40.000+)
- H Focus Bari is the Affiliate Partner of YouGov in Greece

Greeks and Technology



All Greeks are online!

Beginning

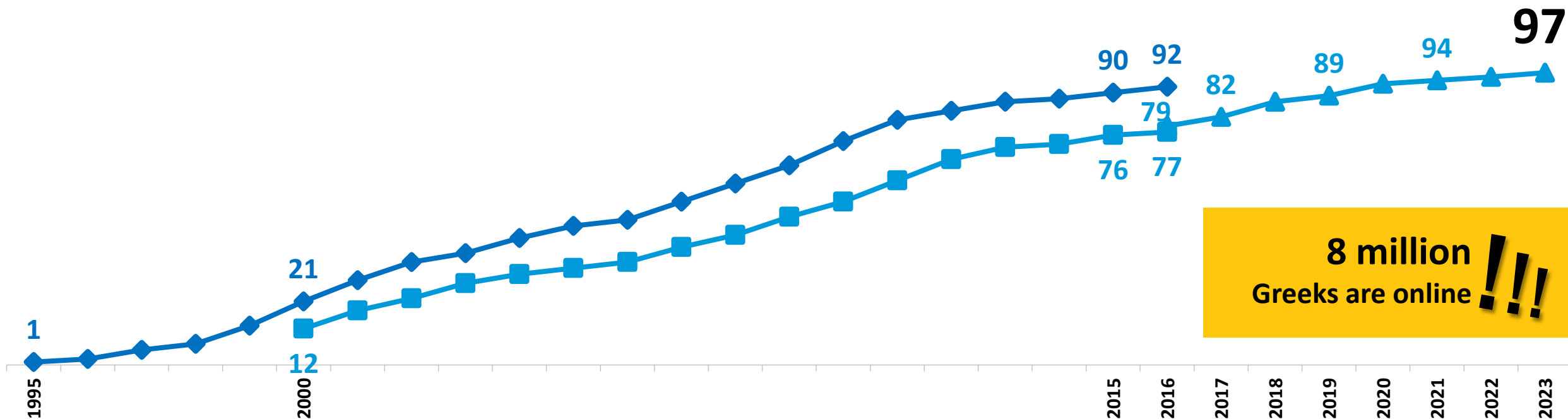
Ages 13-54, Large cities
3.604.000

Expansion

Ages 13-70, National (-25 klm.)
6.585.000

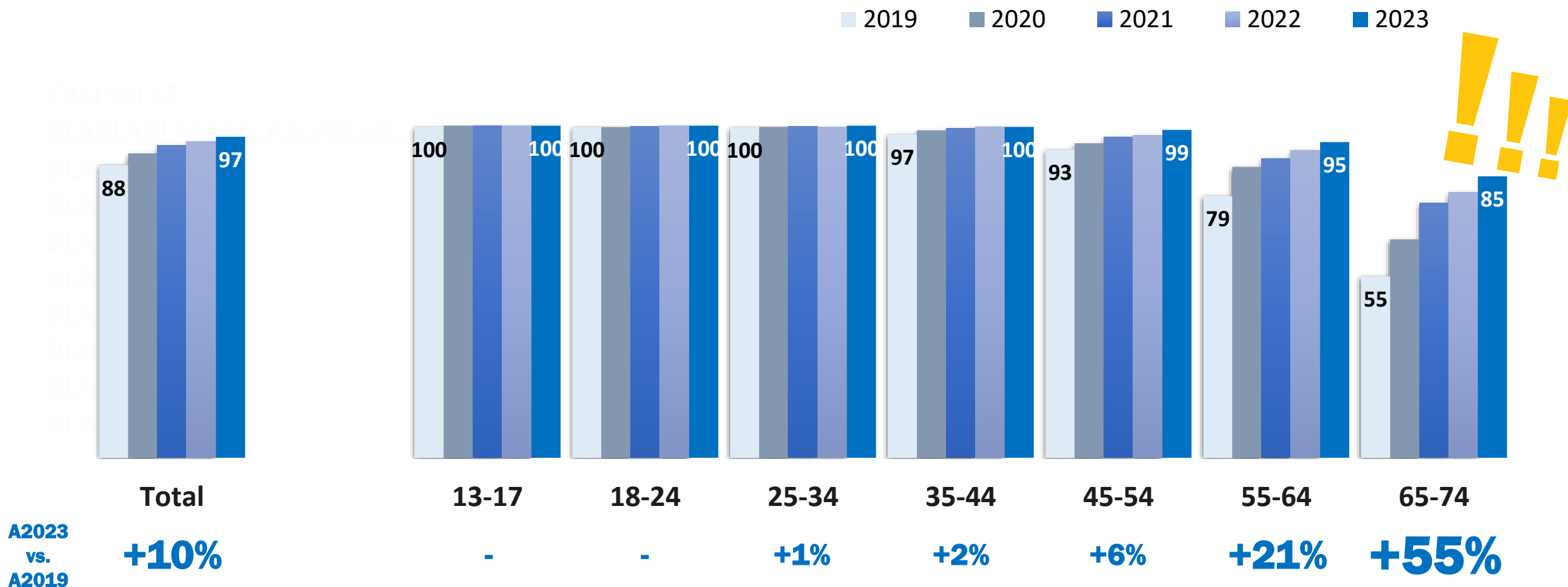
Currently

Ages 13-74, Fully National
8.202.000



8 million
Greeks are online !!!

Including all “mature” adults, and...



...they do everything on their mobile!

«Technology improves my life»

57%

Social
(89%)

Online shopping
(79%)

E-mail
(78%)

Communication
(74%)

Search of information
(73%)

E-banking
(69%)

Public Sector
(52%)

Music
[Listen / download]
(47%)

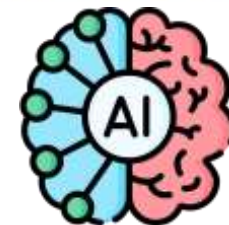
Video
[watch / download]
(44%)

Movies
[watch / download]
(44%)

59%

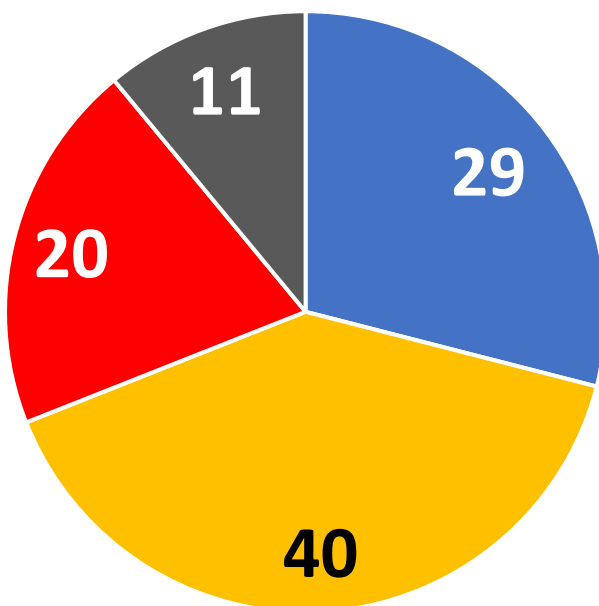
«With a shopping app I shop through my phone»

And while they are cautious towards

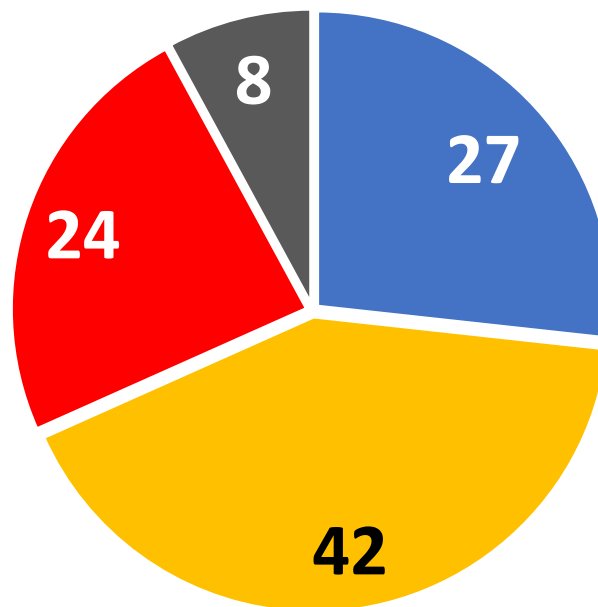


The impact of AI on society will be...

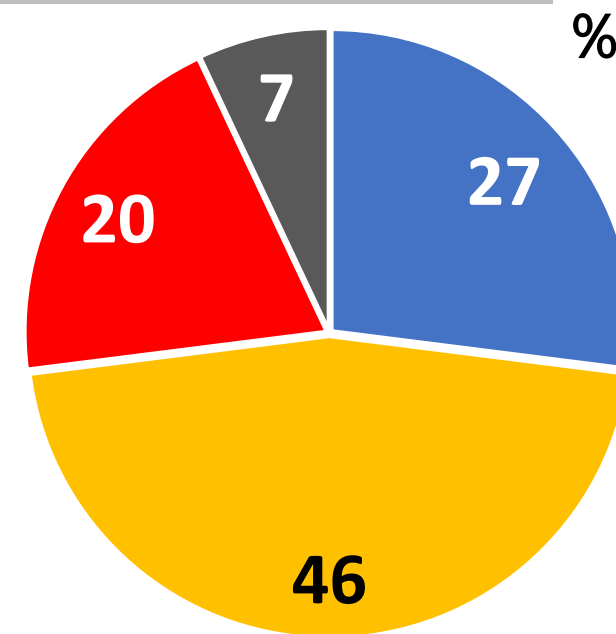
December 2021



July 2023



February 2024



%

■ More positive than negative

■ More negative than positive

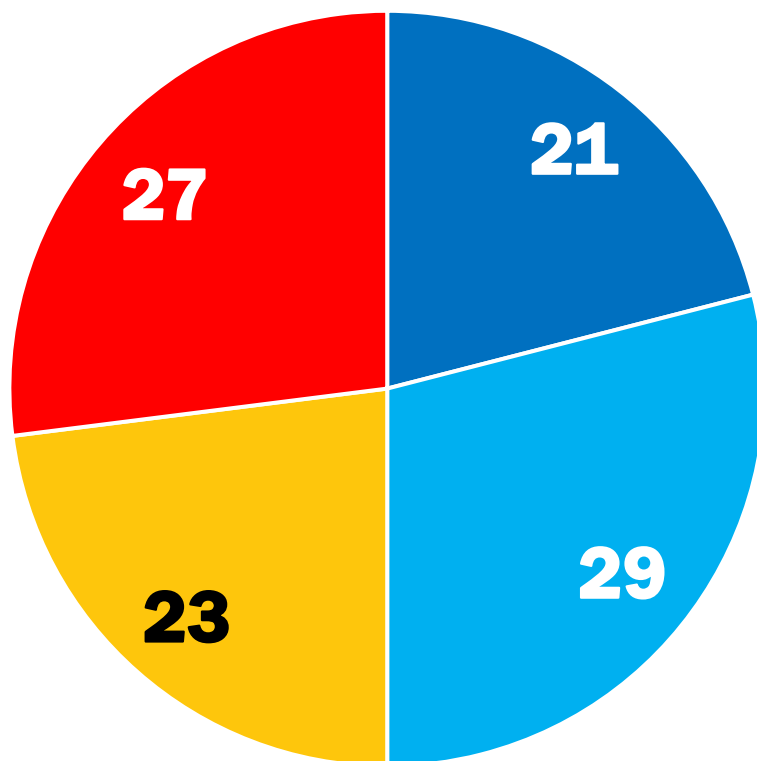
■ Equally positive and negative

■ Don't know

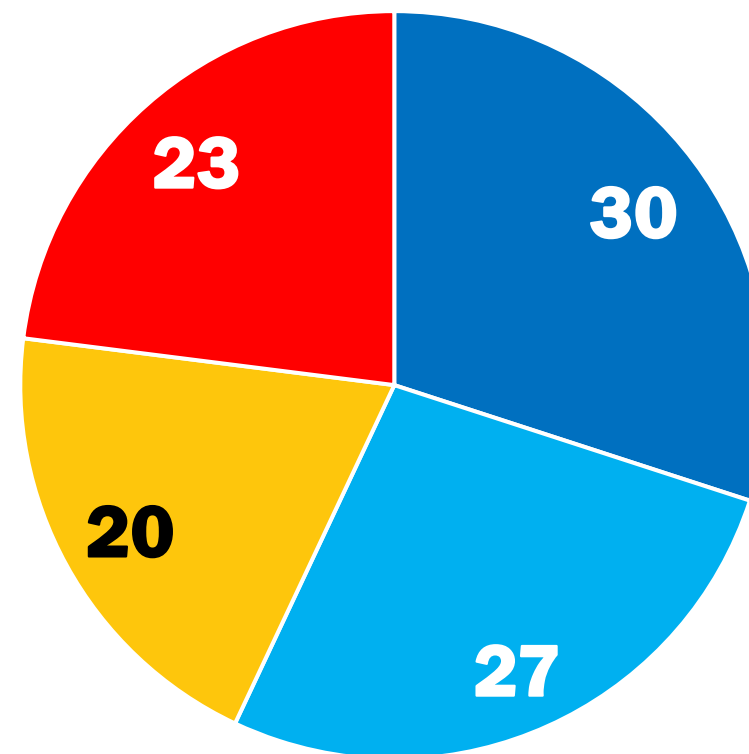
They are growing use of ChatGPT



July 2023



February 2024



%

#1. Key Learning

(tech gaps)

- ✓ Everyone is online, yet with...
- ✓ ...a different level of tech savviness
- ✓ Skepticism is expressed towards AI
- ✓ Continuously growing demands of consumers regarding CX
- ✓ And the C-Journey becoming more and more multi-level and complicated

Tips & Tops of Greek Society Today

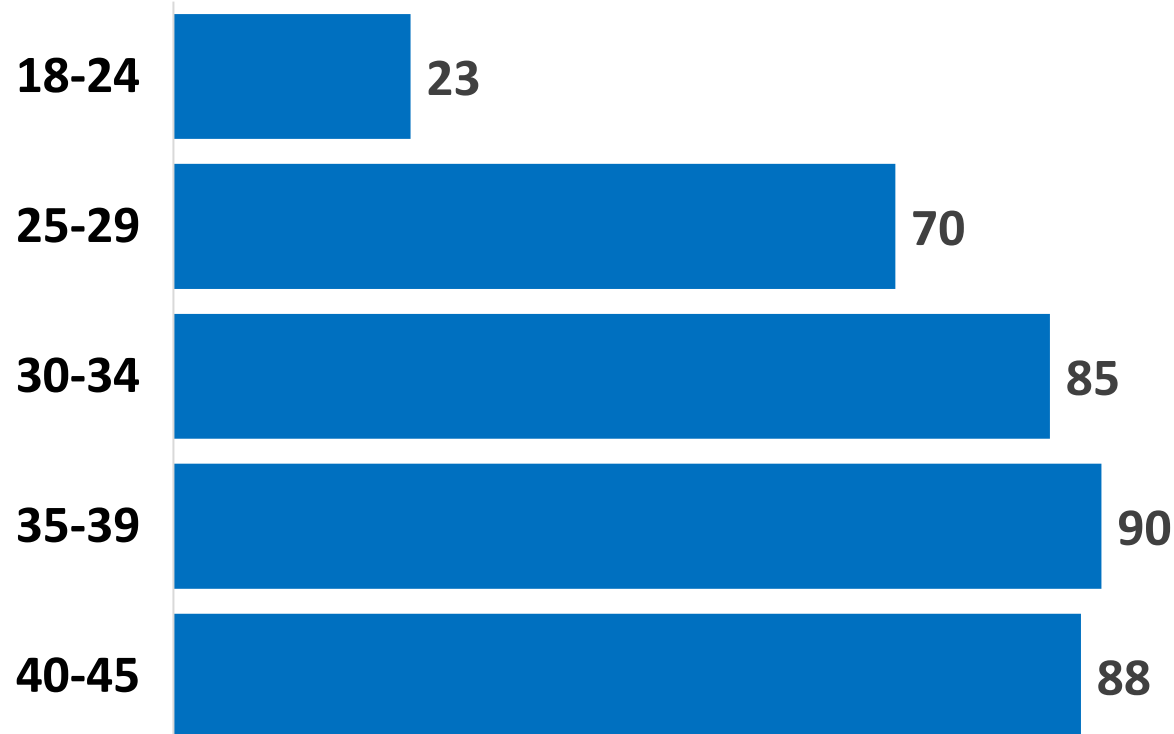


The stage of starting a new family has changed :

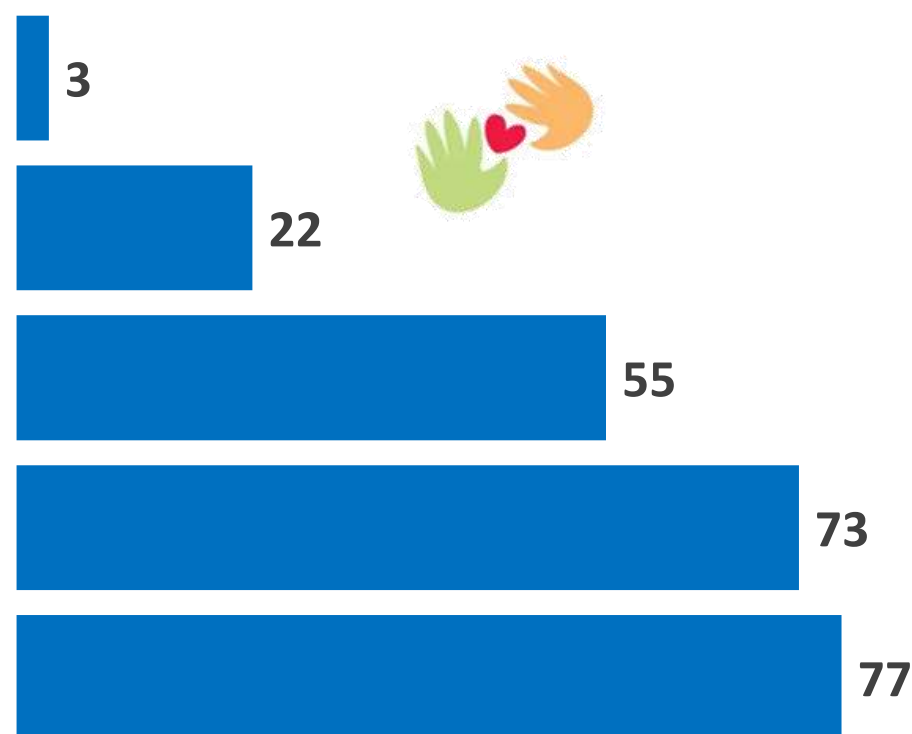
% of married women in each age group



1993

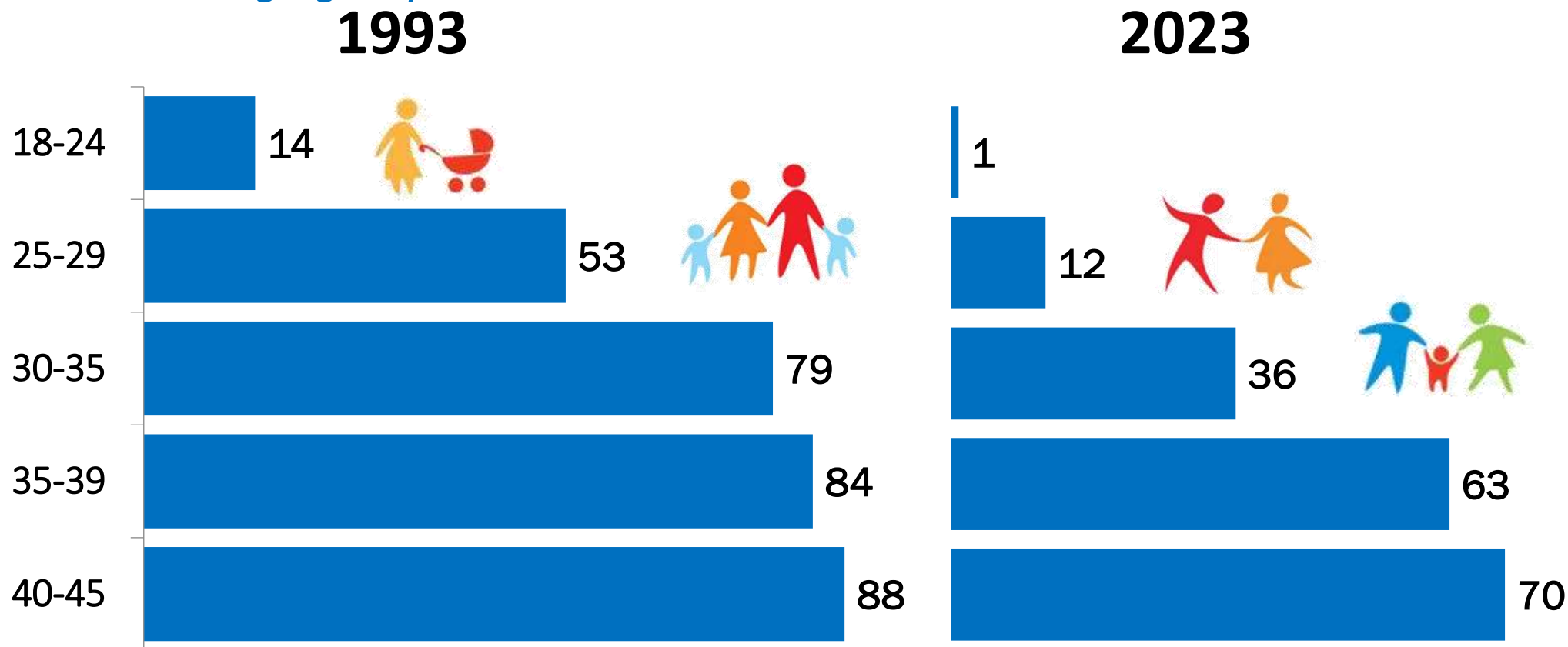


2023



The stage of starting a new family has changed :

% of mothers in each age group



Society is composed of four different generations

Gen Z
18-26

Millennials
27-42

Gen X
43-57

Boomers
58-76



Society is composed of four different generations



Impatience, "Here and Now"

Speed

Work-life
balance

Variety

Change

Fearless

Long term perspective, patience

Security

Stability

Status

Wealth

Resilience



“We want a better world!”



“I want to have a life for me!”



“I need to catch up and make it!”



“The world has changed completely!”

Greek society is faced with a number of issues

Financial Insecurity	60%
Unemployment/ youth	49%

Violence / Criminality 40%

Lack of access to care 35%

Violence against children 30%

Wars and destabilization 29%

Disasters and Climate Change	29%
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Deficiencies in social services 27%

Shadow economy/corruption 24%

Delinquency / Lawlessness 23%

Exploitation and Dehumanization 23%

Immigration and Refugees 20%

Indifference for the collective good 20%

Inhumane behaviors 20%

Inability to manage lending 16%

Social exclusion of groups 15%

Invasion of personal data 14%

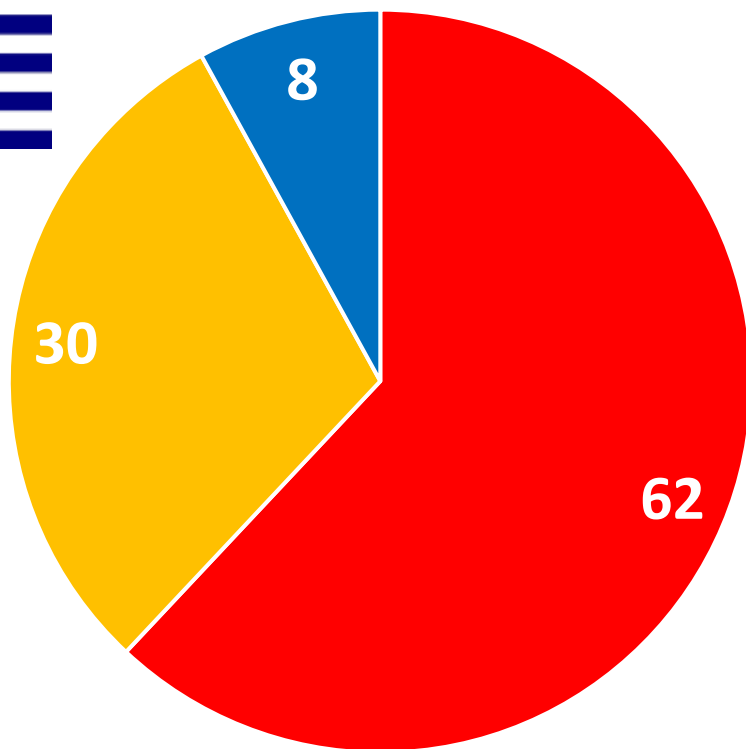
Car accidents 13%

Overconsumption and the environment 11%

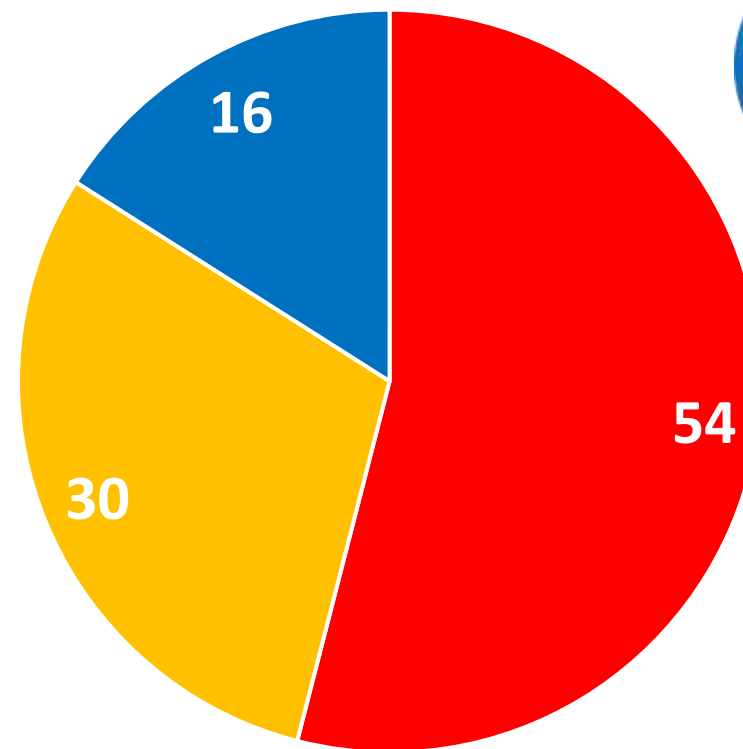


Inflation reduces purchasing power worldwide...

Q. "How has your disposable income changed over the past 12 months due to high inflation?"



%



■ Has decreased due to inflation

■ Has remained the same

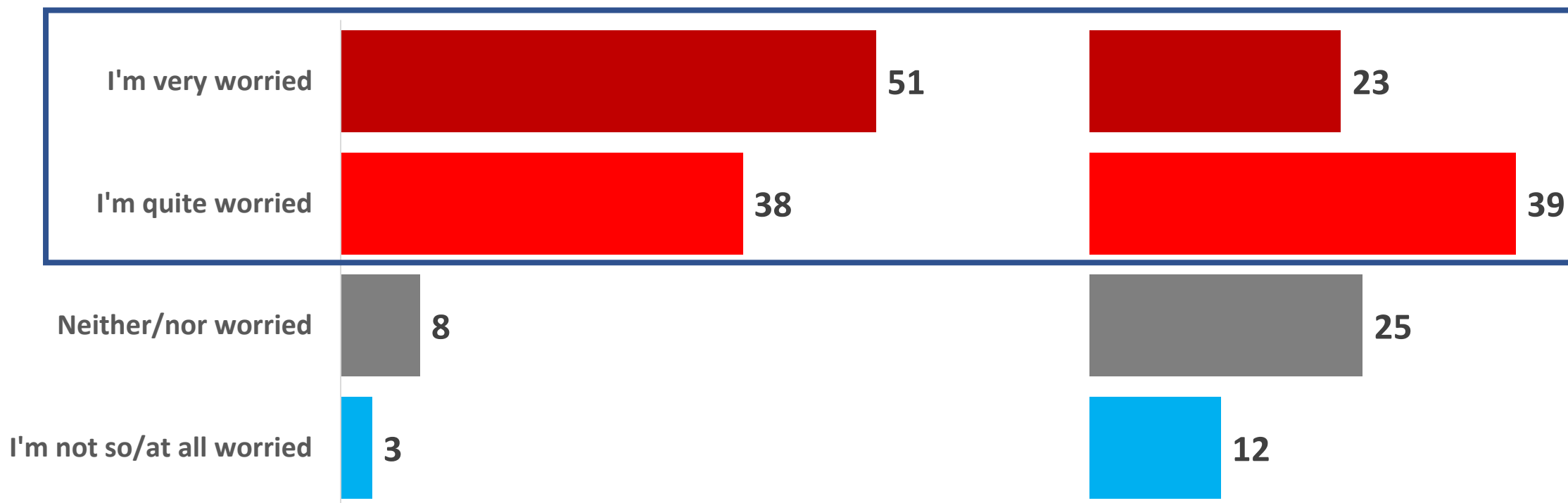
■ Has increased

...causing great anxiety regarding the future!



Q. "How worried are you about the impact of high inflation on your spending over the next 12 months?"

%



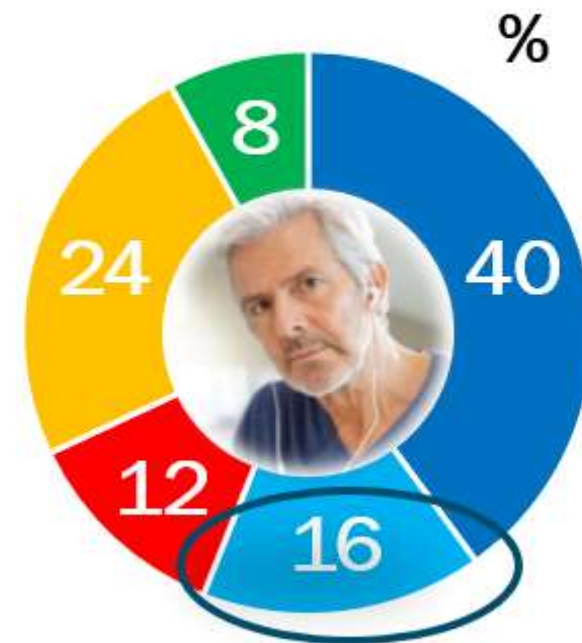
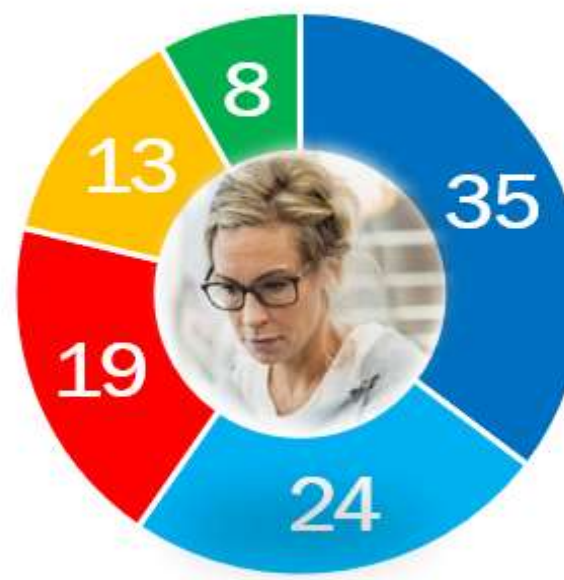
Fear for the future and mental health are the two great challenges of Greeks nowadays, especially the young!

Gen Z

Millennials

Gen X

Boomers



Leaving environmental concern at a theoretical level

"I do my best to recycle"

71%

*"I turn off the lights
when I leave the room"*

84%

*"I would pay more for
sustainable energy"*

23%

*"I don't care if it's green
energy I care if it's
cheap"*

40%

*"Earth-friendly products
are expensive"*

60%

*"I tend to prefer companies
that are friendly to the
planet / environment"*

36%

*"I prefer brands that are
sustainable"*

44%

*"Big companies are
trying to protect the
environment"*

34%

*"I need help to reduce
plastic use"*

36%

*"I want to recycle but it's
a lot of fuss"*

46%

*"It's expensive to choose
"green" all the time"*

46%

#2. Key Learning

(society gaps)

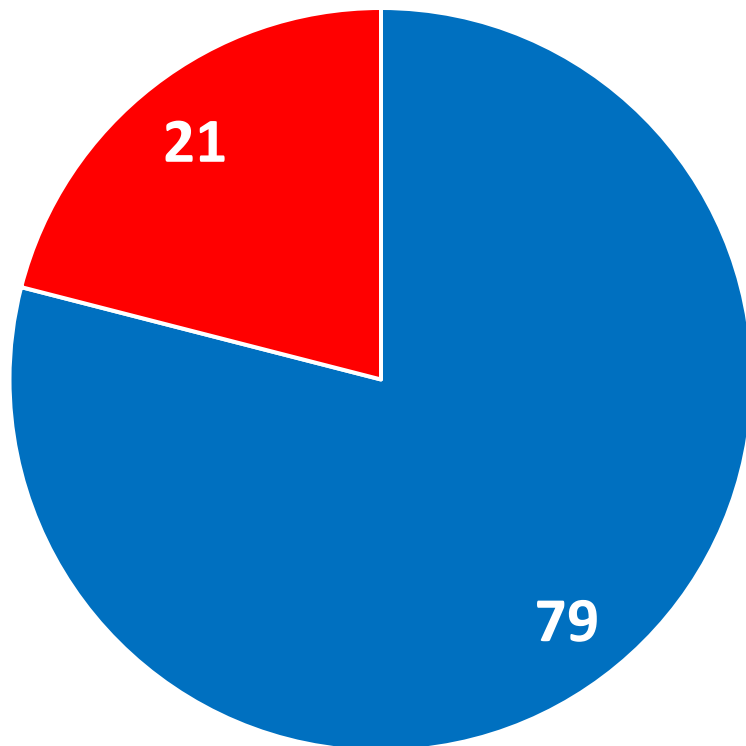
- ✓ Society demographics change
- ✓ With younger ages adopting a wholly new set of life values, challenges and perspective
- ✓ Society is faced with numerous issues
- ✓ With income tightness coming first, ...
- ✓ Influencing greatly priorities and purchasing criteria

The Market of Electrical Appliances



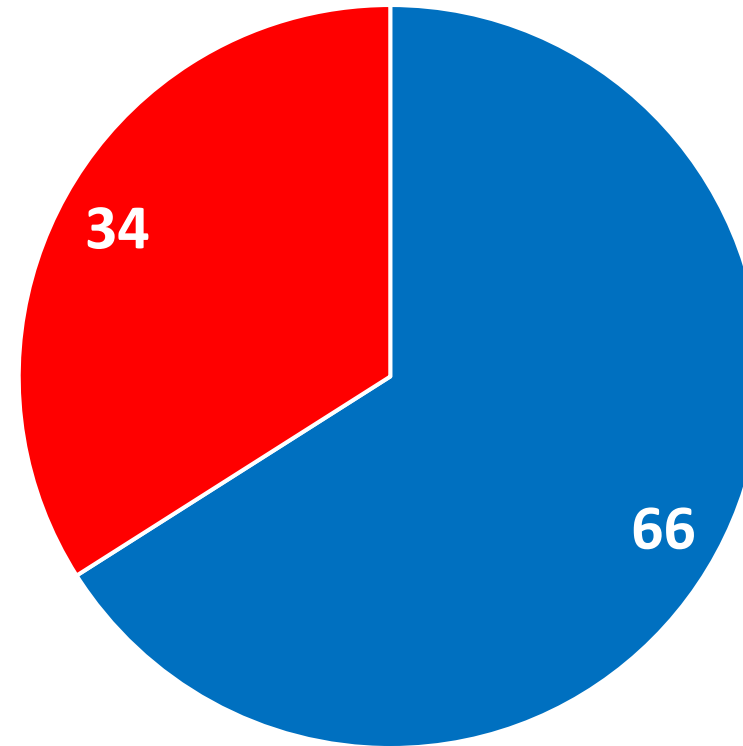
The Market of Electrical Appliances

Bought in last 12 months



Intend to in the next 12 months

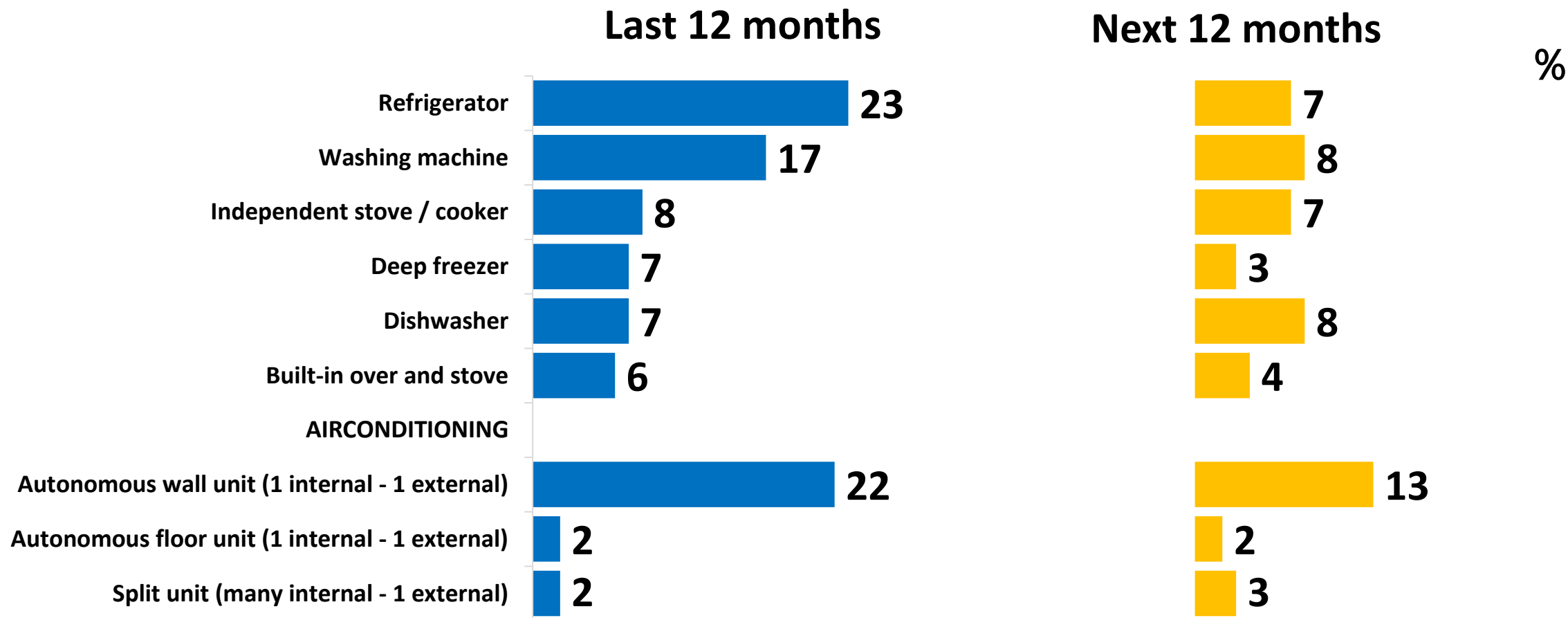
%



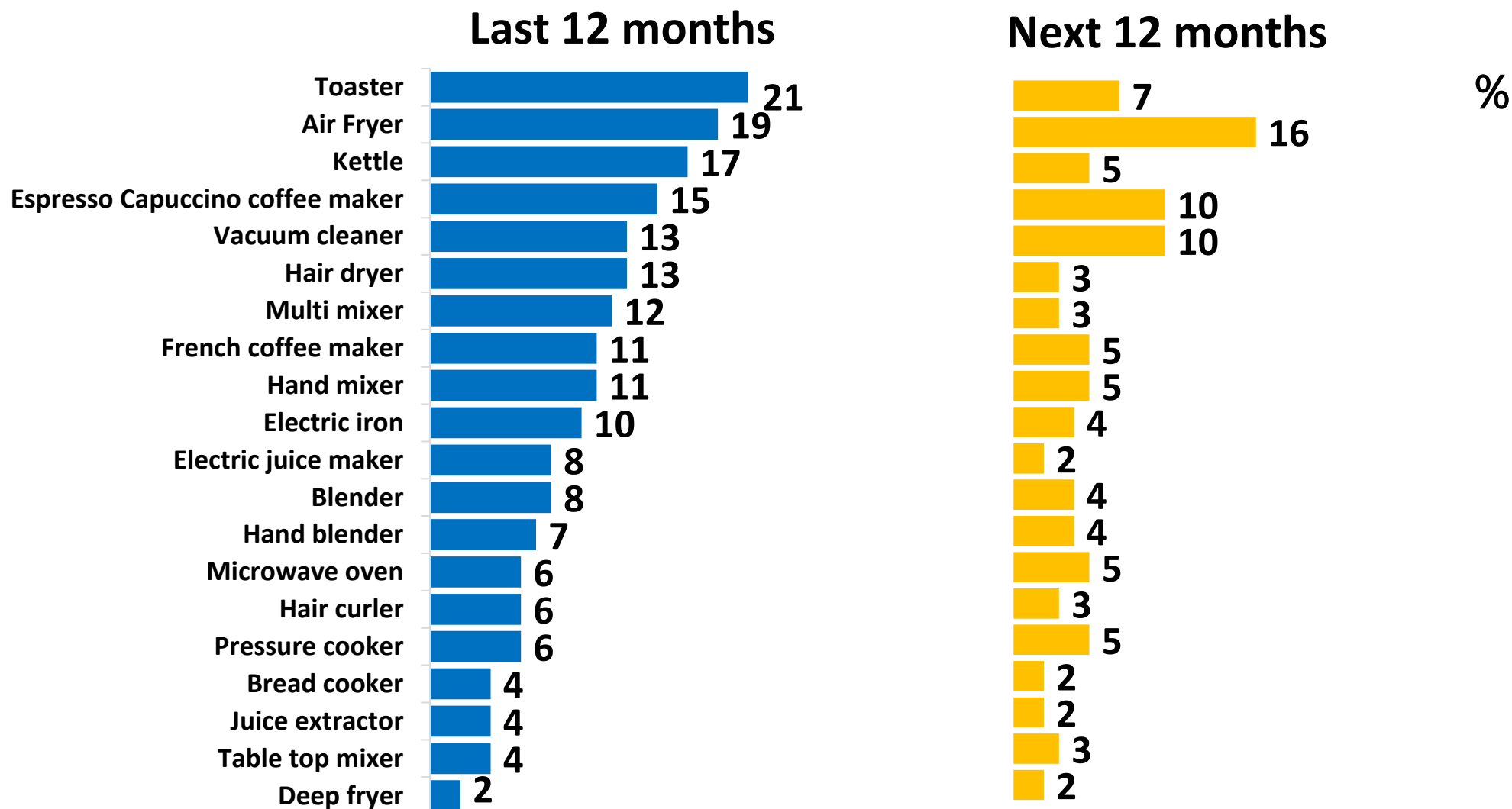
■ At least one

■ None

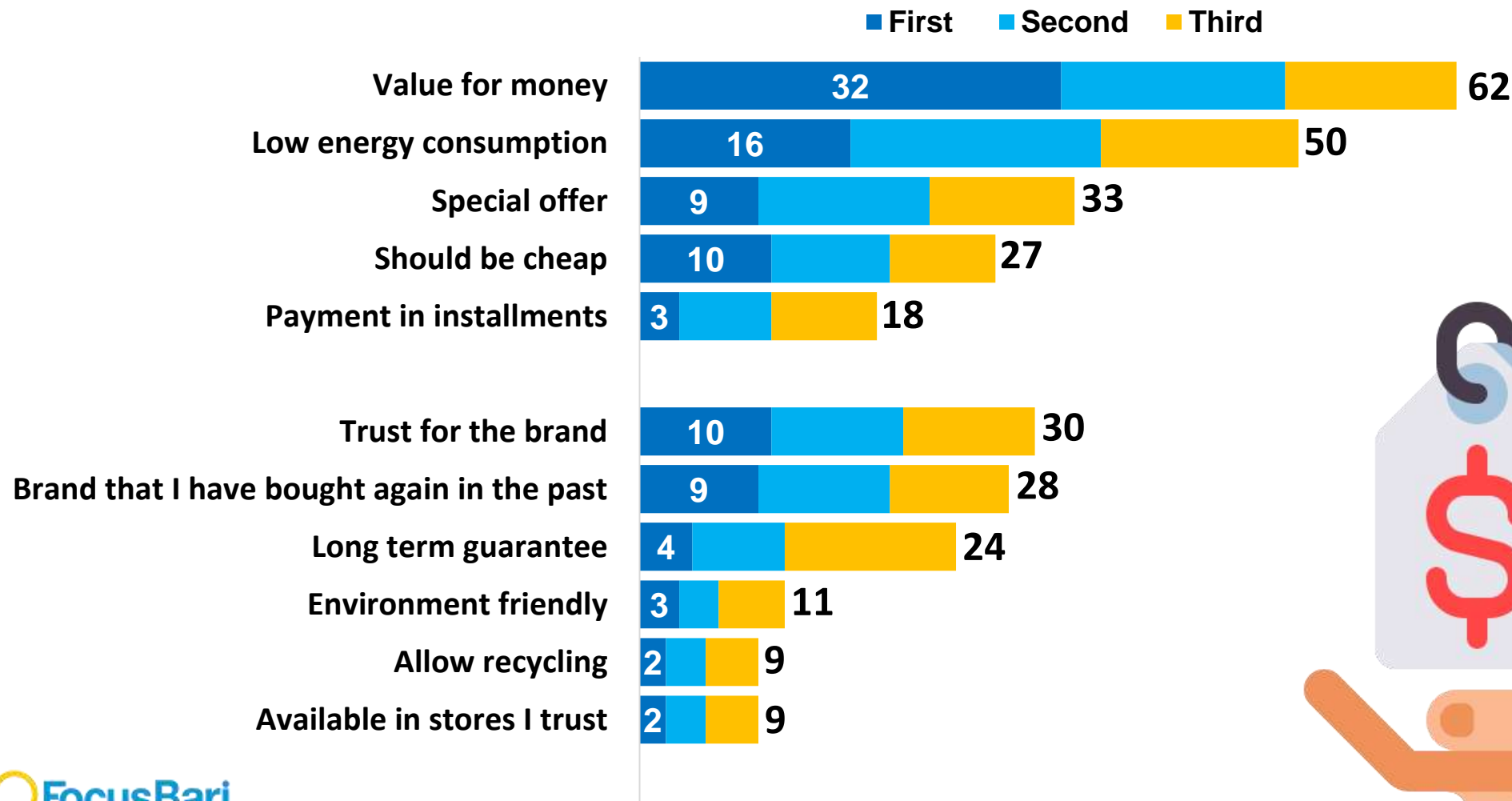
Airconditioning & Large Appliances :



Small Home Electrical Appliances:

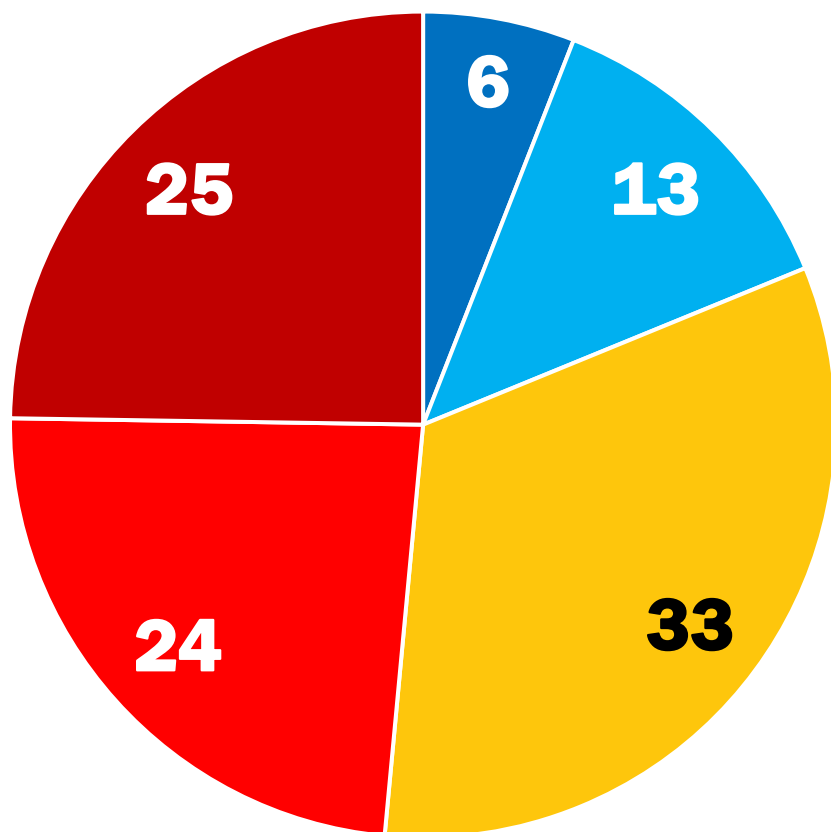


Price-oriented selection criteria take the lead:

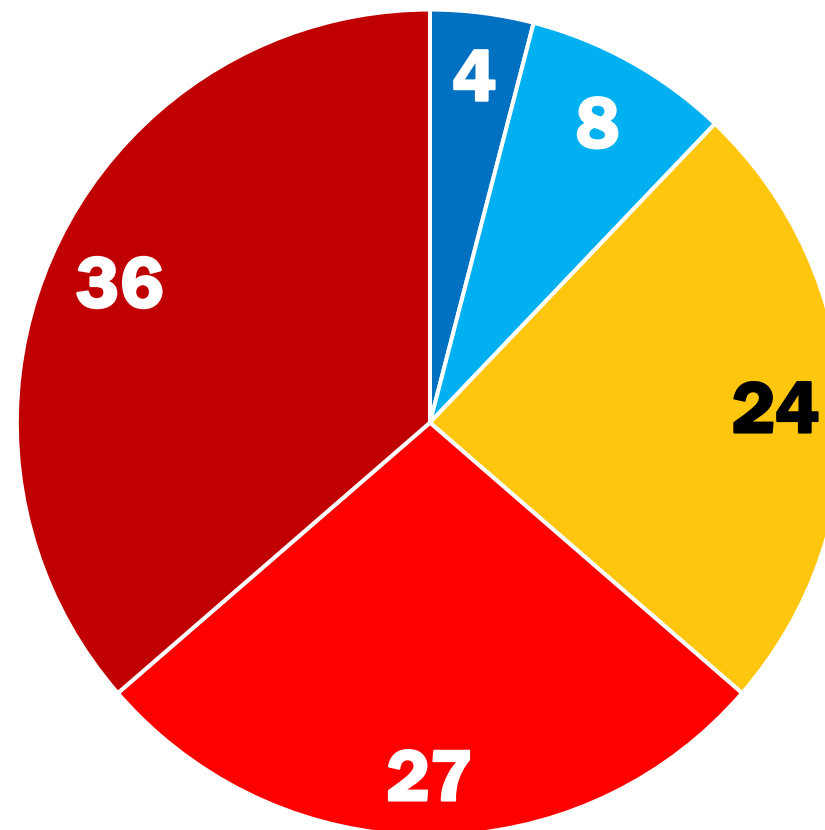


Source of purchase is multi-channel:

Small Appliances



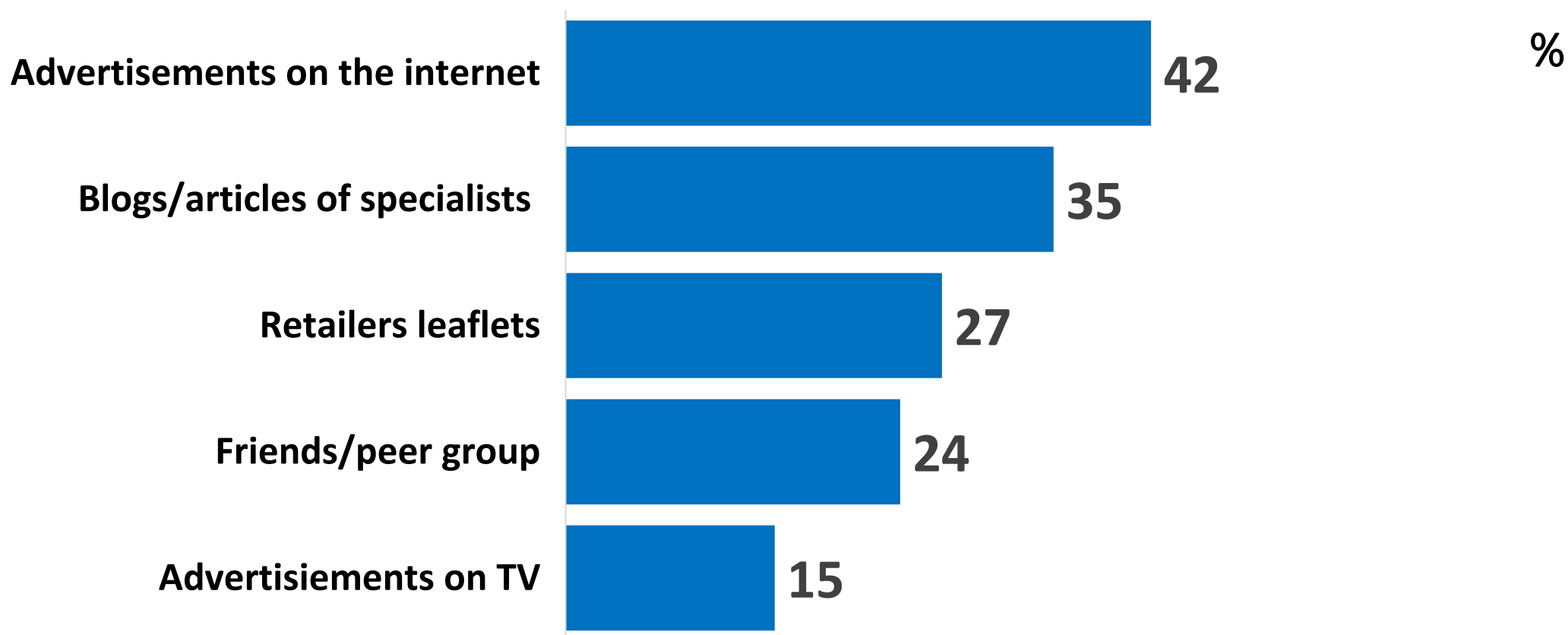
Large - Airconditioning



%

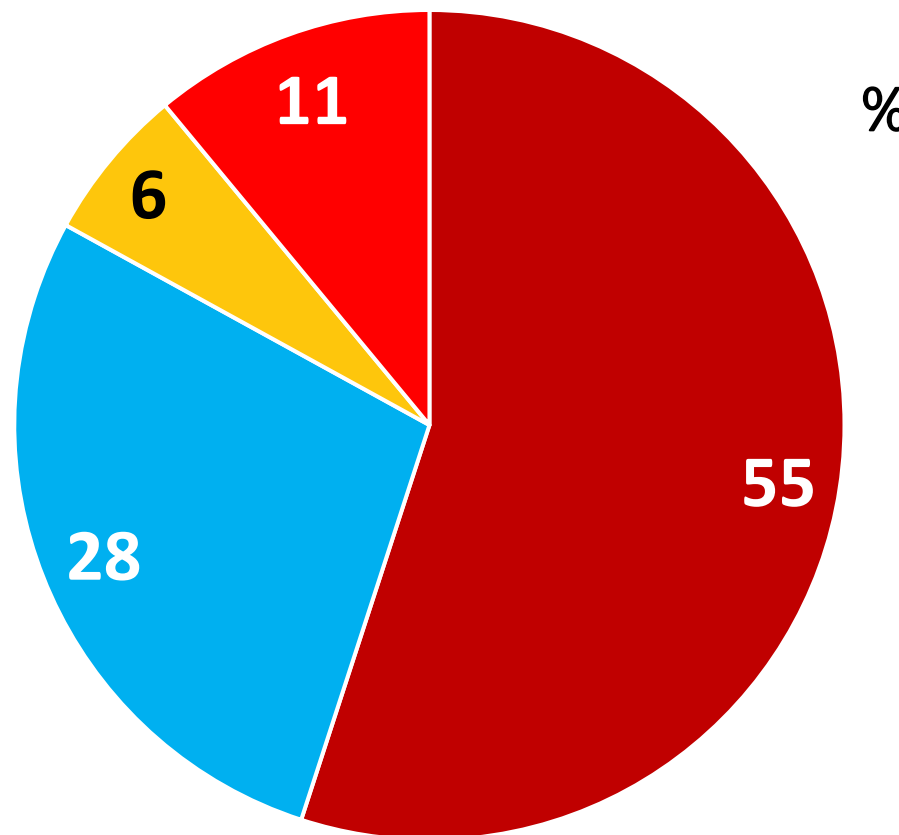
Digital is a strong source of influence:

Ep. «How do you learn about electrical appliances?»



Loyalty to retailers is weak (1/3):

Ep. «From which retailer do you usually purchase electrical appliances?»



- I go into price comparison sites
- From a small neighbourhood store

- From large retailer chains
- I don't have a standard store

#3. Key Learning

(loyalty gaps)

- ✓ The market of electrical appliances is large
- ✓ 2/3 consumers intend to buy at least one in the next 12 months (plus replacements)
- ✓ Economy is the major purchasing criterion, ...
- ✓ Leading to low loyalty to brand and/or retailer



Through the Eyes of Consumers

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Thank you!!