

M-commerce, Social Media and ROPO (Research Online, Purchase Offline) Lead Retail Trends, According to DigitasLBI's Global Survey

49% of consumers in 12 countries around the world say smartphones have changed the way they shop; 88% use the Internet to ROPO (research online, purchase offline); influence of social media highest in China.

[Country] - April 3rd, 2014 – Consumers worldwide are increasingly using multi-platform devices, especially mobile, to enhance their in-store shopping experience, according to a consumer study by global marketing and technology agency DigitasLBI. The first-of-its kind, proprietary research entitled 'Connected Commerce: A Snapshot of the Modern Shopper', looks at the multiple screens and data streams that affect the purchase behavior of consumers across 12 countries: Belgium, China, Denmark, France, Germany, Italy, the Netherlands, Singapore, Spain, Sweden, United-Kingdom and USA.

KEY FINDINGS ACROSS THREE CATEGORIES:

Smartphones and M-commerce Take Centre Stage

Half of survey respondents worldwide* agree that the use of smartphones has changed the way they shop. 34% of smartphone users have made a purchase via their smartphone, and 72% of smartphone users report using their smartphone while inside a store. China leads the way in terms of m-commerce with 76% of smartphone users making a mobile purchase in the last three months, compared to 35% respectively in the US, UK, Germany and Singapore. The percentage of mobile shoppers is less in France (20%), Netherlands (18%) and Belgium (15%).

New Role of Point of Sales and Emerging Shopping Behaviors: ROPO and Showrooming

People are now using the Internet more and more to enhance their shopping experience: 88% of consumers around the world* Research Online, Purchase Offline (ROPO). This behavior is seen in 90% of people in 11 of 12 countries. However, the store remains the fundamental point of contact, and it is the third source of information preferred by worldwide consumers (14%), who expect to take advantage of online services while in the shop.

On a global scale, 19% of consumers report leaving a store after consulting their smartphone and learning that a product they want is cheaper elsewhere, while a further 29% of consumers say they would consider doing so (showrooming). The price component is essential: nearly two in three people surveyed reported that a price difference of at least 5% would make them leave the store; if the price difference increased to 10%, 88% of consumers would leave.

"Shoppers worldwide now regularly use digital devices before shopping in store. They need triggers to get them into the physical retail environment where mobile and social

media are game changers. Retailers need to adapt to offer consumers in-store experiences as exciting, as useful and as personal as the online shopping experience, combining all of the purchase touch points to build a relevant consumer journey for people to get whatever they want from wherever they are" says Vincent Druguet, Deputy General Manager in charge of Connected Commerce.

Social Media's Influence and Social Sharing Varies Widely, with China Leading

82% of Chinese social network users say that social media has influenced their behaviour; in Singapore the figure is 74%; Spain, Italy and the US show a respective average of 55%, while the average for the seven remaining countries is 42%. Four in five Chinese social network users also say they buy more products of brands they follow on social media.

Sharing news of purchased items through social channels is most common in China, where 78% of social media users have shared a purchase via a social network. In contrast, in the UK and Germany, an average of 35% have done so. In Singapore, Italy, Spain and the US, between 40% and 50% of users have shared a purchase via a social network. 49% of global social network users who have ever shared a purchase on social networks did it "just to let their friends know".

Attitudes Regarding Connected Commerce by Country:

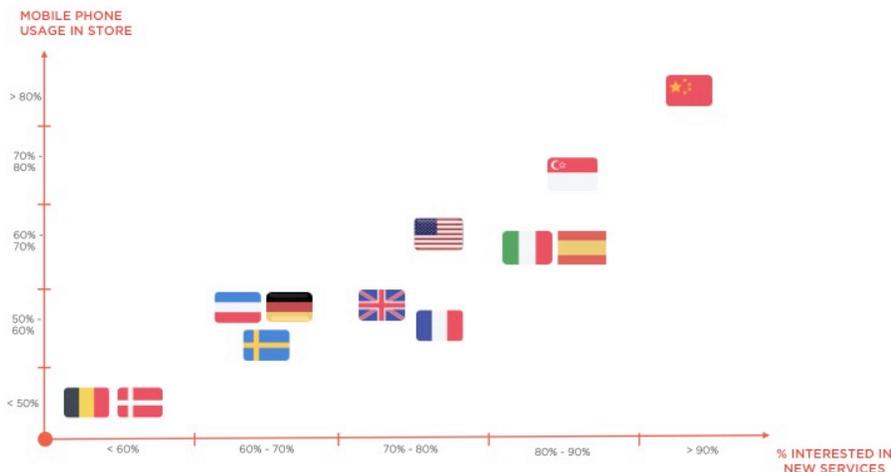
Connected commerce is established and innovation is quickly adopted: China.

Enthusiastic about new technologies and eager to use smartphones for online and offline shopping: Singapore, Italy and Spain.

Interested but cautious: USA, UK and France.

Skeptical attitude towards Connected Commerce/shopping innovations: The Netherlands, Germany and Sweden.

Latecomers: Denmark and Belgium.



ATTITUDES TOWARDS CONNECTED COMMERCE VARY BY COUNTRY

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Size and structure of the sample: 1000 consumers (18 and over) from each country recruited using the quota method (gender, age, region and PCS). Period: study conducted via an online survey from 02/02 to 06/03/2014.

**Worldwide respondent referring to: Belgium, China, Denmark, France, Germany, Italy, the Netherlands, Singapore, Spain, Sweden, United Kingdom and USA.*

More information: www.digitaslb.com/connectedcommerce2014

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