



CONNECTED
COMMERCE
2016

METHODOLOGY

THANKS TO CONNECTED DEVICES LIKE TABLETS AND SMARTPHONES, THE WAY PEOPLE SHOP IS CHANGING DRAMATICALLY.

We aim to better prepare brands for the future of retail.

So for the fifth consecutive year, DigitasLBI has conducted a groundbreaking global survey into the emerging trends of multi-platform shopping across 15 countries. (They include: Australia, Belgium, China, Denmark, France, Germany, Hong Kong, India, Italy, the Netherlands, Singapore, Spain, Sweden, the United Kingdom and the USA.)

The study reveals the latest technology trends and consumer habits that are transforming how, where, and why we buy.



Sample size: 1,000 web users per country aged 18 – 64 (quota method: gender, age, income or social profile, region).





USAGE

**SMARTPHONES ARE INCREASINGLY IMPORTANT
DURING ALL STAGES OF THE CUSTOMER JOURNEY.**

What devices do online shoppers own and
how do they use them?





WHICH DEVICES DO ONLINE SHOPPERS USE?

Ownership of mobile devices is now widespread across all countries



94% in
2016



73% in
2016



90% in
2016



75% in
2016



29% in
2016



61% in
2016

What devices do you
personally use?

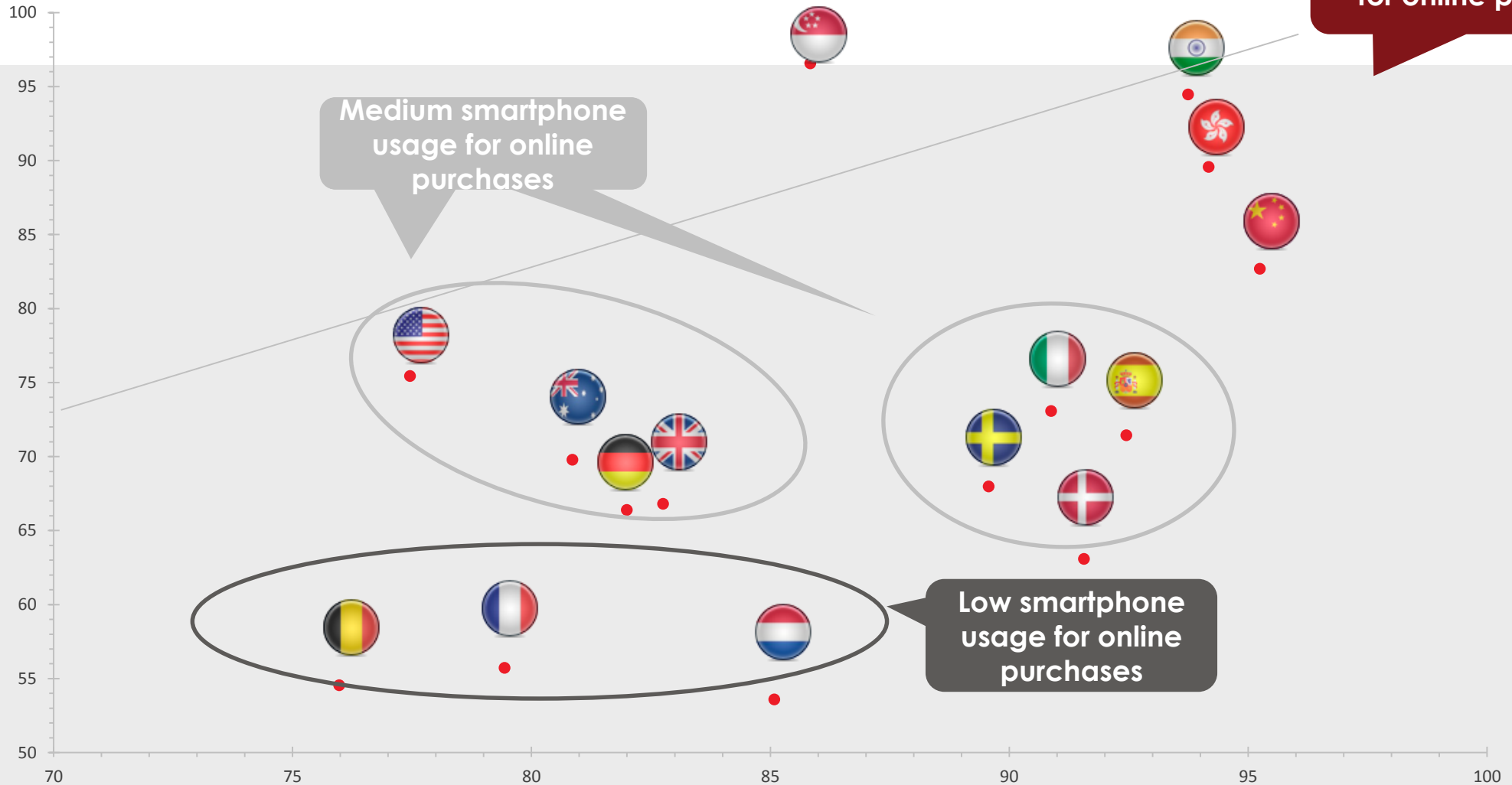


SMARTPHONES

Daily usage and shopping online



Smartphone used to purchase online (in %)



High smartphone usage for online purchases

Medium smartphone usage for online purchases

Low smartphone usage for online purchases



Daily general usage among users (%)



MULTI-DEVICE BEHAVIOURS

Anytime, anywhere, on any device



ON AVERAGE PEOPLE USE 3.9 DEVICES

What devices do you personally use?



SHOPPING BEHAVIOUR BY DEVICE

Online shopping has become common in all countries, although there are some differences in terms of sophistication.



68%
of online shoppers



55%
of online shoppers



83%
of online shoppers



68%
of online shoppers

How frequently do you purchase online, by device used?



PRE-BUYING BEHAVIOUR

HOW DO SHOPPERS RESEARCH PRODUCTS?





MULTI BRAND RETAILER WEBSITES ARE THE MAIN SOURCE OF INFORMATION:

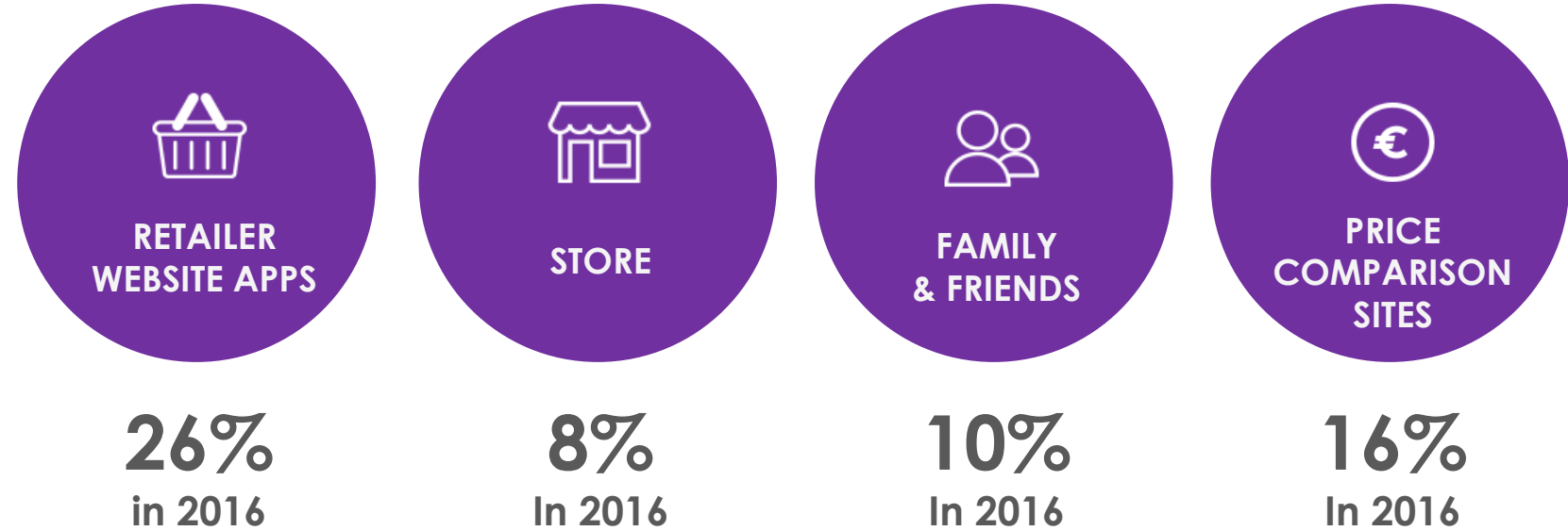
- Retailer websites or apps are the first digital information source in all countries - most notably in the USA, UK, Germany, France and China.
- Price comparison services are next (45%). These are most widely used in Germany, the Netherlands, Denmark, Sweden and Italy.
- In total, 29% of consumers use brand websites or apps (this figure is higher in the USA, UK, Belgium, Sweden, Denmark and Australia).
- In total, reviews by online users or consumers are used by **35%** of shoppers (especially in Germany, the Netherlands, Denmark and Italy).

INFLUENCERS ARE NOT CONSULTED IN THE BUYING PROCESS

- When looking for information on a product or service:
- Only 15% use them during the research process.
 - The immediate social circle (friends, family, colleagues) are the real influencers. They are consulted by 35% of buyers.

FIRST SOURCE OF INFORMATION

Main sources of information used



What resources do you use to search for information on a product or service? I consult... Please grade your responses where 1 is the one you use the most.



Friends and family are important in the buying cycle: 35% of shoppers consult them – as much as they use consumer review sites:

Consumer reviews are important in the pre-purchase journey.

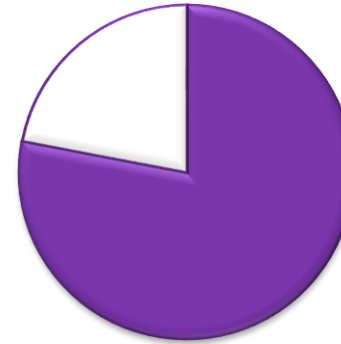
78% of online shoppers look for other users' opinions before purchasing. This is even more important in Asian countries and in South Europe (Spain, Italy)

We can deduce that users' opinions are mostly read on retailers' websites / apps

→ Brands' websites do not always provide users' comments. Perhaps this explains why they are less used before online purchases...

USERS' OPINIONS AND COMMENTS

Impact of digital voices in the purchase process



78%

of online shoppers who search for products online look for other users' opinions and comments

Here are several things that people have said about online purchases. For each of them, please indicate if you agree or not



RETAIL (STILL) RULES

IN-STORE SHOPPING STILL DRIVES 90%* OF SALES

Understanding the real reason for retail preference





Physical, in-store shopping has 3 main advantages over the online experience:

It allows shoppers to **test products** (this was the main driver for 38% of people interviewed, especially in Hong Kong and Singapore (47%))

Items **are immediately available** (this was the key priority for 27% of consumers overall - 34% in UK and 37% in the USA).

Physical proximity is an important consideration for in-store shopping. In particular in the US (53%), UK (50%) and Australia (48%).

THE ADVANTAGES OF BUYING IN-STORE



Sales advisers' expertise is not seen as a key benefit (32% of respondents referred this, only 10% first) → There is a lack of perceived added value as consumers are now as informed as salesmen thanks to the internet

Which one of the following is most likely to make you prefer to buy in-store rather than online?



WHAT ARE YOUR EXPECTATIONS FROM A RETAILER OR BRAND WHEN BUYING ONLINE?



ONLINE PURCHASE ADVANTAGES



Expectations from a retailer or a brand when buying online ?



E-COMMERCE

WHENEVER, WHEREVER, HOW EVER.
This is the way new connected consumers shop.





CONSUMER EXPECTATION

Maximum delivery time

82%

of people
expect *more than* 1 day to be the
maximum delivery time

VS

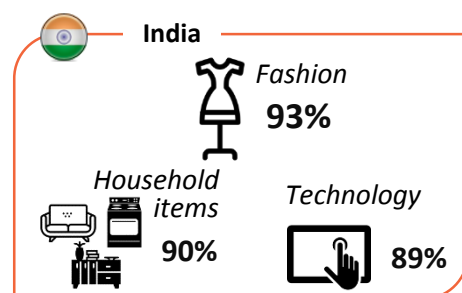
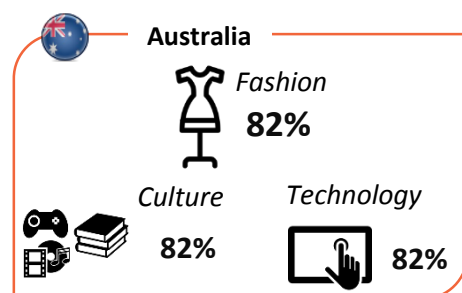
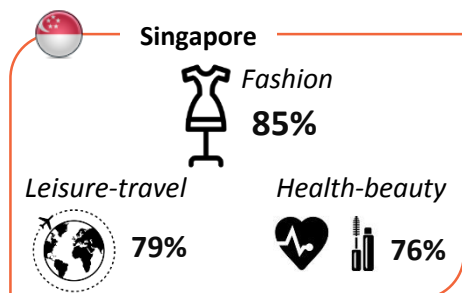
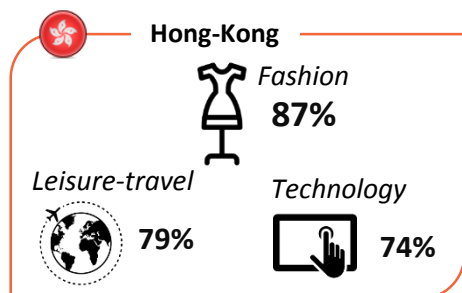
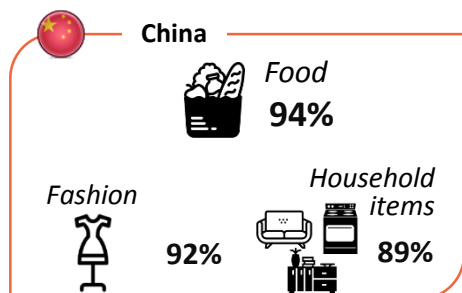
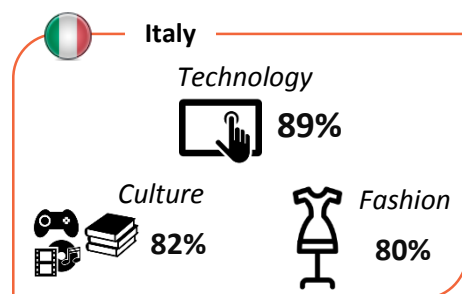
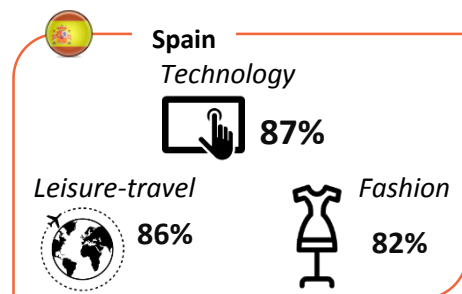
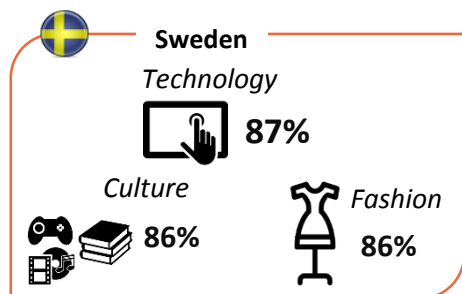
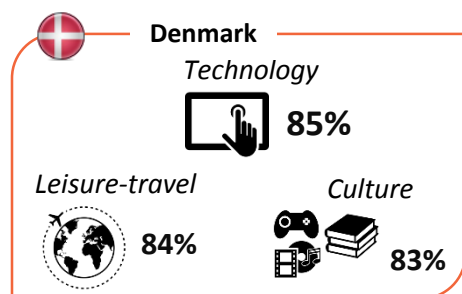
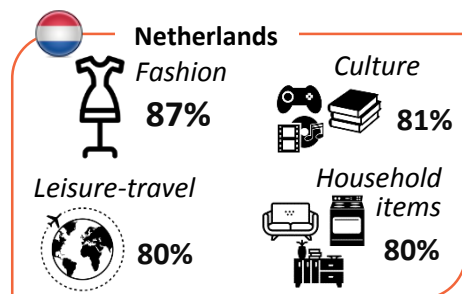
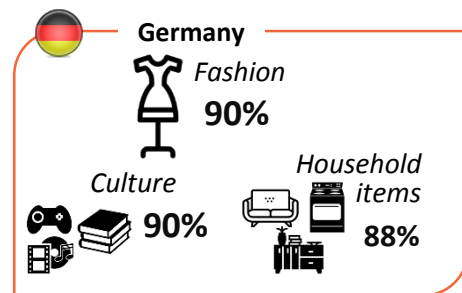
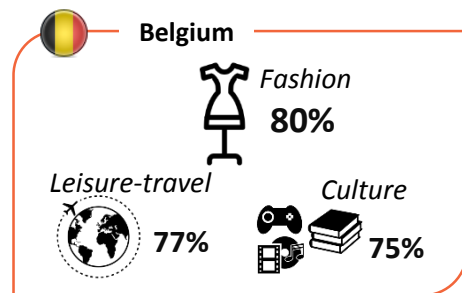
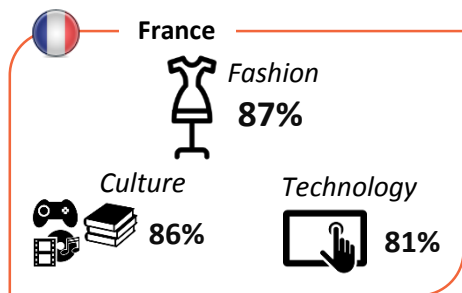
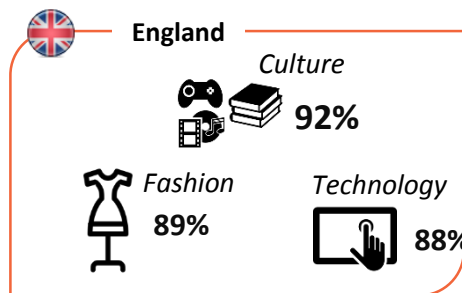
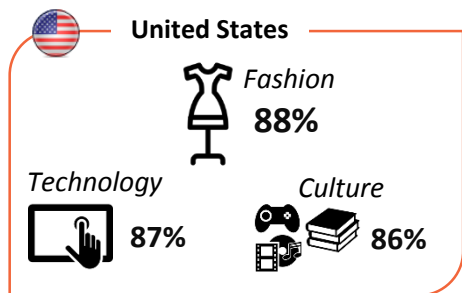
18%

of people
expect 1 day or less

In general, what is the maximum
delivery time you will expect ?

PURCHASE FROM CATEGORIES

Top 3 per country



ONLINE PURCHASE DRIVER

46%

OF PURCHASES ARE
MOTIVATED BY
THE PRICE

MAINLY FOR



18%

OF PURCHASES HAPPEN
BECAUSE THE PRODUCT
WAS NOT AVAILABLE
IN-STORE

MAINLY FOR



14%

OF PURCHASES TAKE
PLACE ONLINE BECAUSE
THE SHOPPER WANTS
STAY
AT HOME

MAINLY FOR



PRICE is the main online purchase driver in all product categories, ahead of choice and comfort.

What was the main motivation behind this purchase ?

Although online purchases are mainly made alone, some products are bought when the shopper is accompanied. This happens most often when purchasing home equipment and leisure-travel products.

PURCHASE ALONE OR ACCOMPANIED



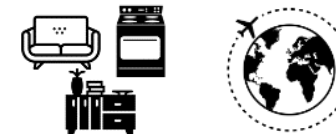
ALONE FOR



TOGETHER FOR



SHORT



LONG

Did you make this purchase alone or accompanied by someone?

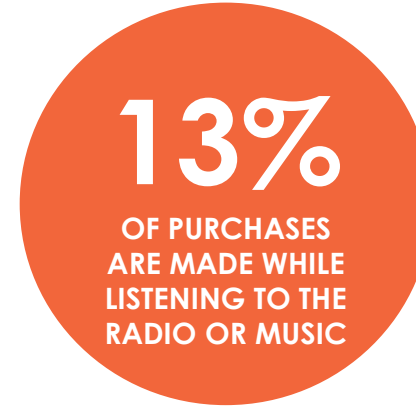
PURCHASE AND MULTITASKING

During the purchase...

Shopping for food and DIY products requires less dedicated concentration. Multitasking is not common with leisure-travel and technology shopping, as it requires expertise and time to research the right products.



SPECIALLY FOR



SPECIALLY FOR



SPECIALLY FOR

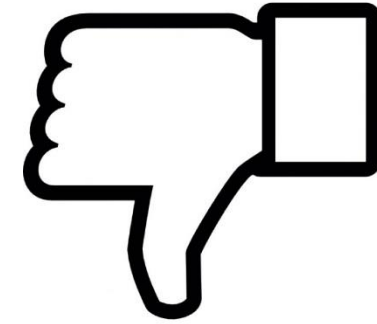


While you make your purchase, were you doing another activity at the same time ?

In summary, the quality of recommendations should be improved – and consumer reviews are an important part of the online purchase journey.

ROOM FOR IMPROVEMENT

Level of satisfaction



PRICE

WEBSITE AND APP EASE OF USE

EASE TO FIND THE PRODUCT

AMOUNT OF CHOICE

QUALITY OF RECOMMENDATIONS

ESPECIALLY FOR



And in detail, how satisfied were you with the purchase process? By this, we mean the full process, in relation to the app / website used. Please rate each item between 0 and 10 where 0 means that you were not satisfied at all and 10 that you were completely satisfied