



CONNECTED
COMMERCE

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 second consecutive year, DigitasLBi has conducted a groundbreaking global survey into the emerging trends of multi-platform shopping across 17 countries. (They include: Australia, Belgium, China, Denmark, UAE, France, Germany, Hong Kong, India, Italy, Japan, 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.



The study was conducted online from March 5th to March 25th, 2015.

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 people own and
how do they use them?





WHICH DEVICES DO PEOPLE USE?

Ownership of mobile devices is now widespread in all countries



85% in 2015
70% in 2014



60% in 2015
39% in 2014



84% in 2015
76% in 2014



71% in 2015
58% in 2014



17% in 2015

What devices do you personally use?

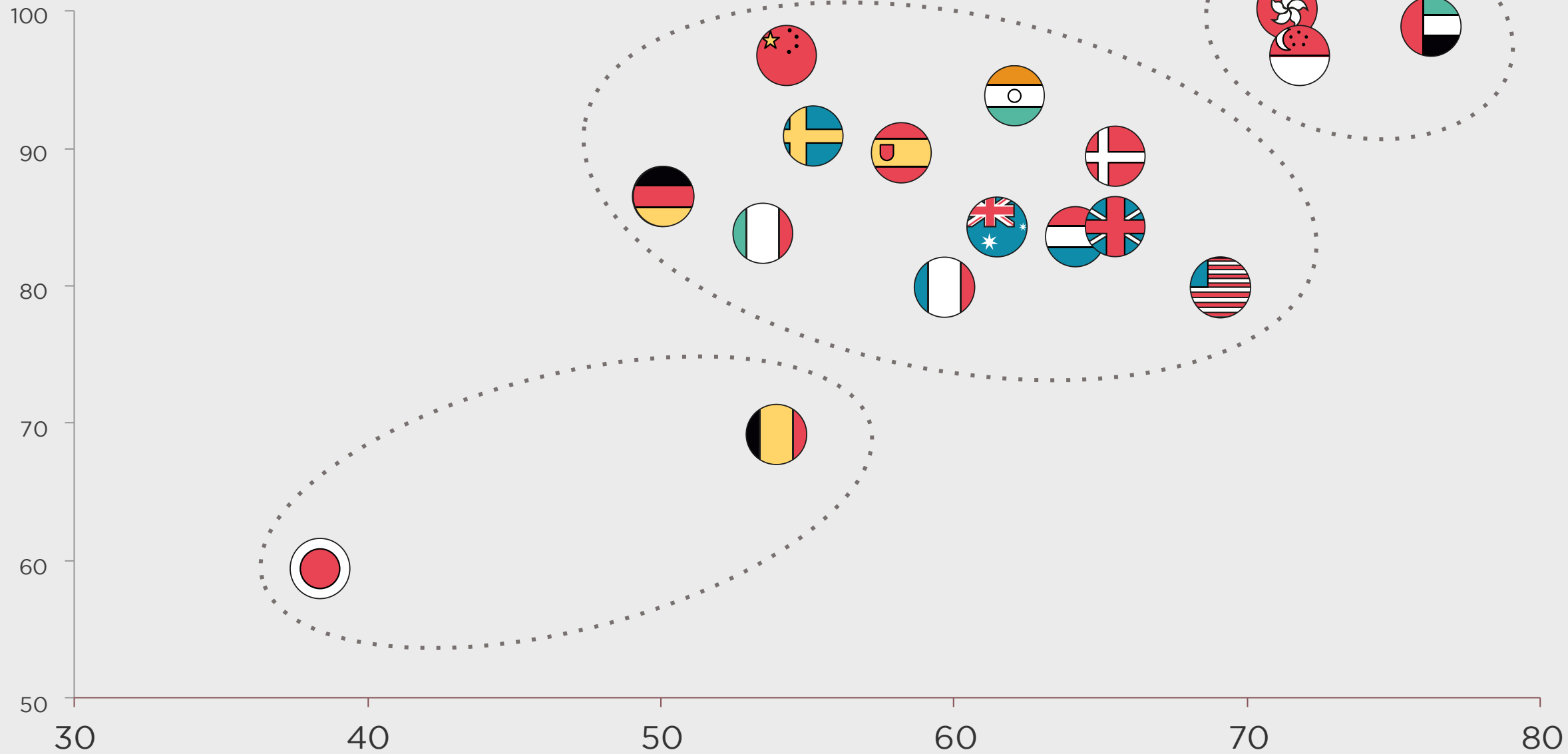


TABLETS AND SMARTPHONES

Penetration rate of total population



SMARTPHONE



BASES:
GLOBAL IN %





MULTI-DEVICE BEHAVIOURS

Anytime, anywhere, any device



ON AVERAGE PEOPLE USE 5 DEVICES

6 in India and UAE
2.7 in 2014

What devices do you personally use?



E-COMMERCE

WHENEVER, WHEREVER, HOWEVER.

This is the way new connected consumers shop.



SHOPPING BEHAVIOUR BY DEVICE

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



28%
of people
in 2015



20%
of people
in 2015



50%
of people
in 2015



41%
of people
in 2015

75% of people have purchased an item online in the last 30 days.

90% in China.
84% in the USA.
68% in Australia.

In the last 30 DAYS, have you bought an item online using one of these devices?

PERSONALISATION

When shopping online, 86% of shoppers expect special offers or discounts – and they’re important for 39% of all shoppers. For 65% of shoppers, offers tailored to their previous purchases or to their user profile are important. (for 20% of e-shoppers, very important)

Overall, 57% of e-shoppers find personalised recommendations important, and 18% very important.

INTEREST IN PERSONALISATION

Impact of personalized experience through a personal account



87%

of people who log in an e-commerce websites in order to have personalized offer, says that they buy more.

78% buy more often, 76% buy more products.

Do you always log in to your e-commerce account when shopping online (on the regular website you use, as Amazon, Baidu, Alibaba, etc.)?



MAIN REASONS FOR NOT LOGGING IN:

Those who purposefully don't log in / log off believe it is 'militant' behaviour. They don't want to give their data to e-commerce websites or they consider it annoying to register each time.

E-COMMERCE LOG-IN HABITS

Personalization is a key driver of performance

75%

NORMALLY LOG IN TO THEIR E-COMMERCE ACCOUNT WHEN SHOPPING ONLINE.

21% always do.

AND AMONG THEM :

40%

'I want to be able to check what I have seen during my previous visits'

37%

'I do not want to re-enter my bank account and personal data every time'

34%

I want to receive personalised marketing and promotional offers'

Why do you log in when shopping online?



RETAIL

THE BRICKS AND MORTAR STORE IS BACK.

But it needs to evolve; be more agile, more digital, and more connected to consumers' lives.





INTERNET APPEARS AS THE MAIN SOURCE OF INFORMATION:

- retailer websites or apps are the first digital source of information in all countries, notably in the USA, UK and the Netherlands
- price comparison services are next (47%), more widely used in Germany, the Netherlands, Denmark, Sweden and Japan
- 37% use brand websites or apps (more in the USA, Belgium, Sweden, Singapore and Australia)
- reviews by online users or consumers are used by 33% (especially in Germany, the Netherlands, Denmark and Sweden)

OFFLINE SOURCES ARE STILL IMPORTANT

when looking for information on a product or service:

- point-of-sale is quoted as the first source of information (16%), especially in Belgium, Denmark, Spain and Italy
- the immediate social circle (friends, family, colleagues) comes second (15%); it is more common in Asian countries (China, Hong-Kong, Singapore and India).

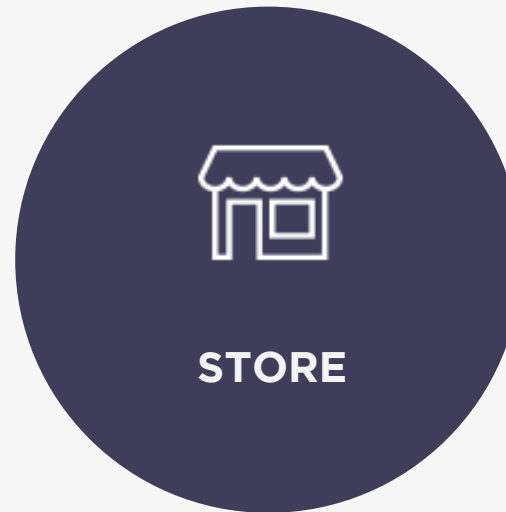
SOURCES OF INFORMATION

Main sources of information used



20%
in 2015

18% in 2014 (1)



16%
in 2015

14% in 2014 (4)



15%
in 2015

13% in 2014 (5)



14%
in 2015

15% in 2014 (2)

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.



DIRECT IMPACT OF MOBILE USE IN-STORE ON THE PURCHASING PROCESS

The opportunity to access more information about products in-store through mobile clearly impacts the purchasing process: 77% of internet users have been influenced by mobile and 28% have bought through mobile.

USE OF MOBILE DEVICES IN-STORE

85%

OF SMARTPHONE OWNERS HAVE USED THEIR MOBILE PHONE IN-STORE; 72% IN 2014.

Mobile usage in-store is even more developed in UAE and Asia (China, Hong Kong, Singapore and India), where the figure is 90%.

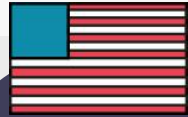
55%

OF SMARTPHONE USERS THINK THE INTERNET AND SMARTPHONES HAVE CHANGED THE WAY THEY SHOP IN-STORE.

Has the use of the Internet, mobile phones, smartphones and tablets changed the way you shop in-store ?



NEW DIGITAL SERVICES IN STORE



71%

Of **U.S** consumers are willing to receive personalised money-off vouchers or special offers on their mobile whilst in the store.



39%

Of **UK** consumers are willing to use a virtual reality helmet (i.e.: Oculus Rift) to discover a product not available in-store.



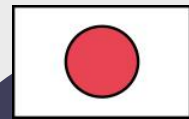
58%

Of shoppers in **Spain** would try on clothes virtually using a digital mirror.



83%

Of **UAE** consumers are willing to use a loyalty card on their mobile phones.



57%

Of **Japanese** consumers are willing to check in-store stock availability via their mobile phones.



62%

Of **Italian** consumers are willing to use a system allowing them to be identified in-store in order to receive certain advantages.



75%

Of **Hong Kong** consumers are willing to use interactive terminals to browse and buy the products available in-store.



NEW DIGITAL SERVICES IN STORE



77%

Of **Singaporean** consumers are keen to find out which products are most popular with other shoppers via their mobile or directly in-store.



43%

Of **Dutch** consumers would like sales assistants to be able to process payments via a portable tablet without having to go to the cash desk.



46%

Of shoppers in **Germany** would be willing to pay via their mobile phones in-store.



81%

Of **Indian** consumers are interested in accessing complementary products by scanning a product's barcode.



74%

Of **Chinese** consumers would be happy to use an interactive store window display to shop when the store is closed.



55%

Of **French** consumers would like to have a personal shopper available in-store.



37%

Of **Belgium** consumers are willing to use a mobile app to organise their shopping according to their shopping lists.



MOBILE

MOBILE IS STILL DRIVING CHANGE.

Being the personal shopping assistant for consumers.





SMARTPHONE ADDICTS



77%

of smartphone users use their smartphones to connect to the internet at least once a day.

In the last 3 months, have you used your mobile Internet? (to read your emails, use an app, download something, search for information, etc.) ?



THE SMARTPHONE GATE

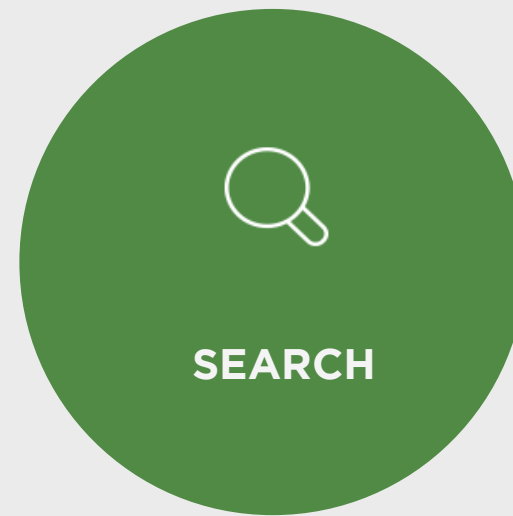
Smartphones are playing a key role in the relationship between consumers and stores



85%

of smartphone owners have used their mobile in-store

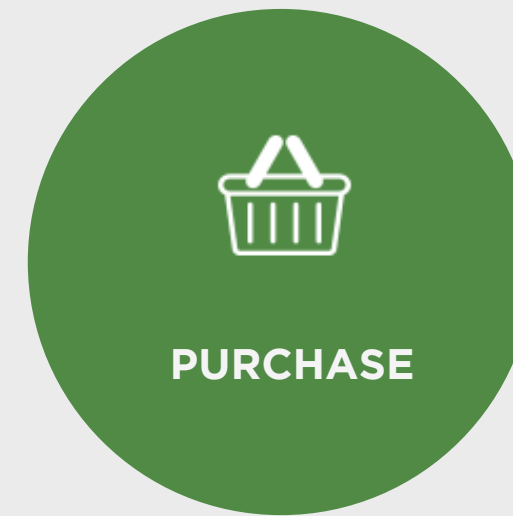
72% in 2014



48%

of smartphone owners have searched online using their mobile

58% in 2014



33%

of smartphone owners have bought through their mobile

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 most ?



MOBILE PAYMENTS

Mobile purchasing has increased, but is still far behind in terms of total online purchasing (80%)



33%

of smartphone users have bought through their mobile in the last 30 days

Mobile shopping is more developed in UAE (39%) and the USA (44%) than in Europe and Australia, where the figure is around 20% on average.



62%

of smartphone users would be ready to use their device to pay in-store

21% have already done it; 49% in India, 34% in USA

In the last 30 days, have you purchased an item... ?



SOCIAL

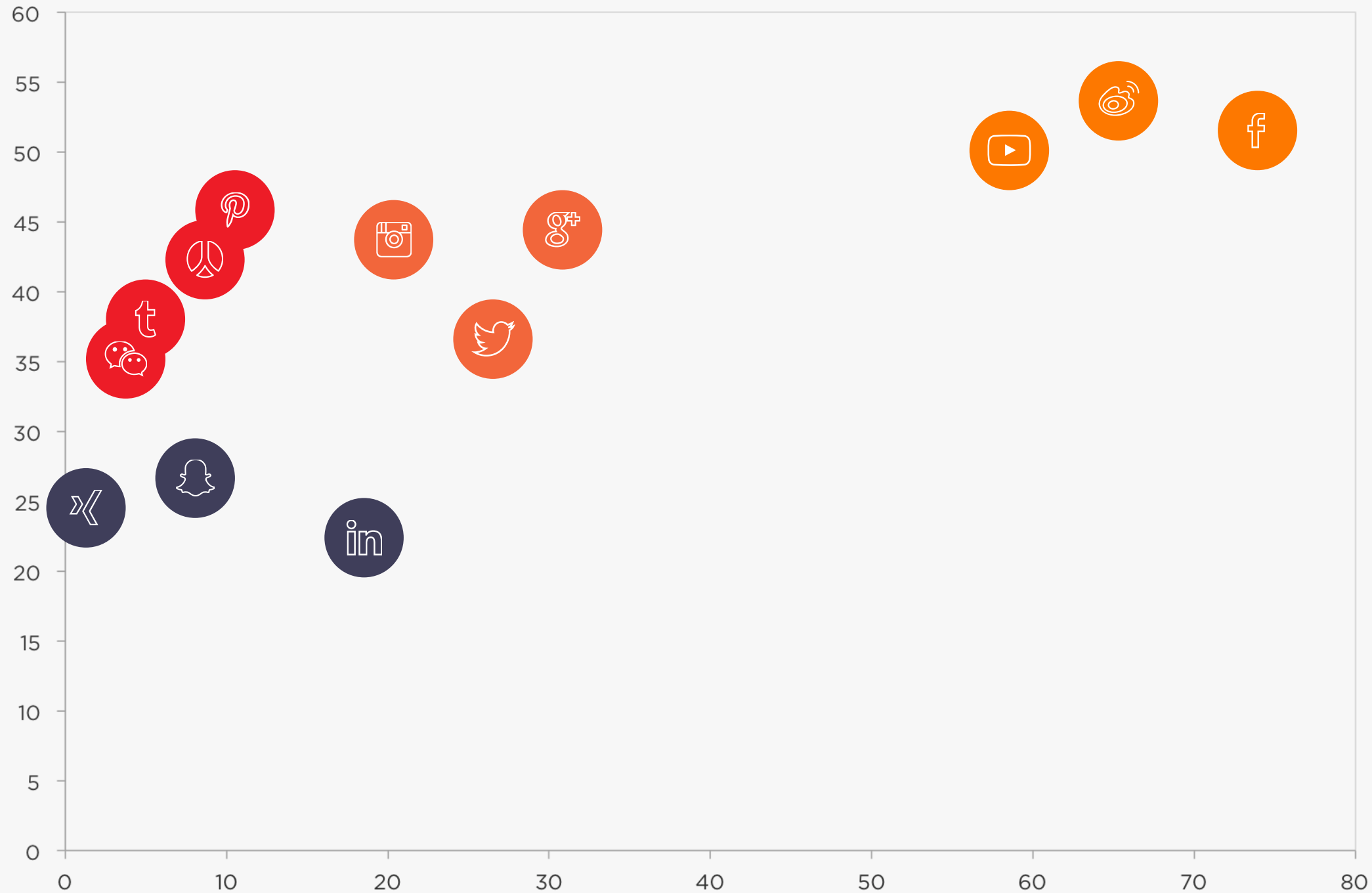
**SOCIAL MEDIA IS INFLUENCING AN INCREASING
NUMBER OF PURCHASES ON AND OFFLINE.**



SOCIAL MEDIA INFLUENCE

Across all 17 countries

**INFLUENCE ON PURCHASE AMONG USERS
PER SOCIAL NETWORK USED**



- STRONG USAGE AND INFLUENCE ON PURCHASE -> KEY PLAYERS**
- MEDIUM INFLUENCE ON PURCHASE AND GROWING USAGE -> NEW LEADERS?**
- MEDIUM INFLUENCE ON PURCHASE AND LOW USAGE -> CHALLENGERS**
- LOW USAGE AND LOW INFLUENCE ON PURCHASE -> UNSUITABLE FOR E-SHIPPING?**

PENETRATION RATE
TOTAL USAGE AMONG
POPULATION



INFLUENCE OF SOCIAL NETWORKS ON THE PURCHASING PROCESS

Facebook and Sina Weibo in China are the social networks most likely to influence purchases



53% of Sina Weibo users claim to be influenced by Sina Weibo



52% of Facebook users claim to be influenced by Facebook



46% of Pinterest users claim to be influenced by Pinterest



43% of Instagram users claim to be influenced by Instagram



36% of Twitter users claim to be influenced by Twitter

35%

OF SOCIAL NETWORK USERS SAY THAT, WHEN IN-STORE, THEY BUY MORE PRODUCTS OF BRANDS THEY FOLLOW ON SOCIAL MEDIA NETWORKS.

60% in China, 18% in The Netherlands.

Which of the following social media platforms do you think influence you-make you want to buy certain products ?



MARKET MATURITY DIFFERS COUNTRY BY COUNTRY, ESPECIALLY IN ASIA VS THE REST OF THE WORLD.

Purchases via social media platforms are more developed in the USA, UAE and Asia; less so in Europe.

Sina Weibo and Renren users are the most familiar with direct online purchases, even more so than Google+ or Facebook users.

SOCIAL PURCHASE

Social media platforms are not yet a major purchasing channel.

28%

OF SOCIAL NETWORK USERS HAVE BOUGHT AN ITEM DIRECTLY FROM A SOCIAL MEDIA PLATFORM IN THE LAST 30 DAYS.

32% in the USA, 56% in Singapore, 25% in the UK.

39%

from Sina Weibo

29%

from Renren

23%

from Facebook

21%

from Instagram

18%

from Pinterest

17%

from Twitter

Have you ever bought an item directly from a social media platform?