

Retail Without Limits

A Modern Commercial Society

Global Responses Fact Sheet

This document incorporates key statistics delivered by global respondents in the research. Average responses listed with highest and lowest responses in brackets.

The Privacy Conflict

31% say that personalization technologies enabling retailers to collect personal information about their shopping habits provide the most value to their shopping experience (55% in India / 12% in Germany):

- 56% understand the benefits of sharing personal data in encouraging more targeted promotions and rewards, and better product allocation and availability
- 55% still have reservations or disagree with this approach
- 23% are happy to share personal information

Demand for Transparency

Consumers see most value in technologies that deliver:

- 70% say visibility to stock so I can make my purchase anytime, anywhere (88% in Russia / 52% in Japan)
- 59% say access to detailed product information through digital and store channels (77% in India / 35% in Japan)
- 51% say the ability to track current orders and review order history (63% in India / 21% in Japan)
- 42% say a connected shopping experience that ties together channels with fulfilment, including returns, and service (78% in China / 18% in France)

The technologies consumers feel would most enhance their experience are:

- 57% say deliver a converged commerce experience (78% in China / 30% in Japan)
- 50% say provide in-store apps that enable product search (68% in China / 28% in Germany)
- 31% say mobile point-of-service (59% in India / 14% in Germany)
- 25% say solutions that personalize my experience every time (45% in India / 14% in the UK)
- 31% say that the right product in the right place at the right time matters most to them (51% in Russia / 20% in France), and 51% say they are more loyal if retailers do this right (67% in Russia / 35% in Japan).

Consumers' biggest frustrations when shopping are:

- 54% say lack of quality in goods (67% in China / 34% in Japan)
- 45% say lack of product availability (56% in the USA / 26% in Japan)
- 43% say poor service in-store due to ill-informed associates (55% in Germany / 22% in Japan)
- 41% say poor after-sales service (57% in Germany / 22% in Japan)

The Global Opportunity

Favorite retailers in order of popularity are: Amazon, Flipkart, Walmart, eBay and Tesco, with primary attributes listed as:

- 55% say price (63% in Australia / 43% in China)
- 41% say quality (56% in India / 31% in Japan)
- 36% say choice (55% in Germany / 10% in Brazil)
- 27% say convenience (45% in Russia / 16% in Brazil and France)

56% have purchased goods from an offshore international retailer (70% in Brazil / 41% in Japan) because they get:

- 67% say a better price (77% in Australia / 54% in Japan)
- 43% say a brand or product unavailable in their own country (55% in India / 35% in Brazil)
- 35% say more range (44% in Russia / 14% in Japan)
- 33% say better availability (64% in Russia / 14% in France)
- 26% say better service (47% in India / 13% in Australia)

Differentiate With Your Store

The store remains the favored shopping channel despite considerable geographical differences:

- 44% prefer buying goods in-store and taking them home (69% in Australia / 18% in China)
- 34% prefer to buy online and have goods delivered home (49% in China / 19% in Australia)
- 8% prefer to buy goods in-store and have them delivered home (15% in India and Japan / 4% in Australia and Germany)
- 8% prefer to buy online and collect items in-store (19% in Russia / 3% in Germany)

Consumers use different channels with different frequencies:

- 22% shop in-store several times a week (30% in Russia / 12% in Brazil)
- 10% shop online several times a week (21% in China / 4% in Russia)
- 27% shop in-store once a week (37% in the USA / 15% in Brazil)
- 15% shop online once a week (21% in the UK / 8% in France and Russia)
- 25% shop in-store several times a month (32% Brazil / 11% in Russia)
- 39% shop online several times a month (42% in Brazil, China, India and the UK / 31% in Australia)
- 16% shop in-store less frequently (36% in Brazil / 7% in Russia)
- 29% shop online less frequently (45% in Russia / 7% in China)

40% say local and convenient stores can influence their loyalty to a retailer (54% in Germany / 21% in Brazil)

The Value In Your People

25% want store associates to recognize the shopper and their purchase history and personalize interactions accordingly (45% in India / 14% in the UK)

44% are inclined to buy if a store assistant uses mobile technology to check availability, product details or other information (69% in China / 23% in Australia)

55% want store associates to engage with them personally in-store (66% in Germany and India / 42% in Russia)

46% say their loyalty is influenced by great in-person service (64% in Brazil / 18% in Japan)

Mobile, Apps, Social – Investing in the Future of Retail

59% say their use of technology to shop has increased over the last year (84% in India / 42% in Australia and Japan). In particular:

- 67% are using mobile more (86% in India / 45% in Japan)
- 67% are using home computers more (77% in India / 53% in the UK)
- 45% are using social media more (65% in India / 29% in Japan)
- 43% are using apps more in-store or on-the-go (54% in India / 27% in Japan)
- 42% are using tablets more (48% in Australia / 34% in Germany and Japan)

Only 12% say their use of technology when shopping has not changed over the last year (26% in Japan / 2% in China)

51% are incentivized to make a purchase if they've seen a video promoting it (69% in Russia / 32% in Australia)

Consumers use a variety of digital and social channels to collect and share information with friends and followers:

- 68% use Facebook (91% in India / 51% in Japan)
- 29% use Twitter (54% in India / 11% in Germany)
- 26% use other channels (40% in Russia / 12% in India)
- 15% use Instagram (25% in Brazil / 6% in Germany)
- 11% use Pinterest (26% in USA / 3% in Russia)

Social media users are divided as to whether they want retailers to use these channels to communicate with them:

- 33% say yes (64% in China / 14% in France)
- 33% say possibly (48% in Russia / 22% in France)
- 34% say no (63% in France / 9% in China)

The Convergence of Commerce

83% think it is important for retailers to adopt new technologies to improve the shopping experience (98% in Brazil / 64% in France)