

The Smart Shopper Snapshot

September 2015



About the Consumer Barometer

Introduction

The Consumer Barometer is a free tool that delivers consumer insights to support planning and decision-making in a fast changing digital landscape. The tool can be accessed here: www.consumerbarometer.com

Methodology

Data in the Consumer Barometer comes from two sources - the core Consumer Barometer questionnaire, which is focused on the adult online population, and Connected Consumer Study, which seeks to enumerate the total adult population and is used to weight the Consumer Barometer results.

Sampling

Sample size was set at a minimum of $n=3,000$ in each European country. Quotas were applied in the sampling process with regard to age, gender, educational level and region as well as online activities and smartphone usage. Quotas were taken from the Connected Consumer Survey to ensure a locally representative sample for the online population.

The Smart Shopper

The Internet plays a key role in the consumer journey for many product categories. As a result, an integrated marketing strategy is critical for marketers and planners. The Smart Shopper snapshot shows how marketers can reach customers at key decision-making moments. Respondents were asked to discuss a recent purchase in a specific product category.

Markets covered

The Smart Shopper Snapshot focuses on internet users across Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Ukraine, United Kingdom

Base size

The Smart Shopper Snapshot looks at the opinions of European internet users aged 16+ accessing via computer, tablet or smartphone and answering based on a recent purchase; Total Respondents: 185369



- Awareness
- Research behaviour
- Research via connected devices
- Purchase behaviour
- International purchases
- Insights and recommendations

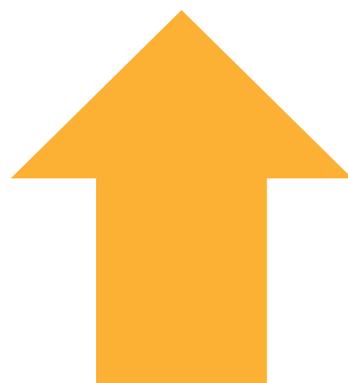
Awareness

Just as many online Europeans find out about products via online advertising as they do TV advertising

40% of European people rely on previous experience

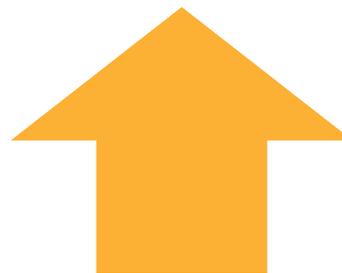


21% pre-purchase research



56% research online
37% research offline

13% discussions with other people



77% in person
9% via social network
7% via text message

10% through advertising



28% TV
27% online

How did people first hear about the product / offer they bought?

Base: Internet users (accessing via computer, tablet or smartphone); Answering based on a recent purchase (n=185369)

- European people rely on what they already know or previous research to inform purchases. In fact over half of those that rely on pre-purchase research have done so via online channels so a good online presence is very important to brands to enable them to influence choice.
- Just as many European people find out about products via online advertising as they do TV advertising, suggesting a cross-media advertising strategy is important for brands.

Research behaviour

81% of European internet users do some form of research prior to making a purchase

81% of people did research prior to their recent purchase

21% researched only offline

17% researched only online

Under 35s 17%

 **36%**

 **28%**



Under 35s 18%

25% 

23% 

37% researched in-store
24% discussed with European people
19% discussed with family/friends/colleagues
17% offline media

49% search engine
25% brand websites
21% retailer websites
11% price comparison sites

43% researched both online and offline (Under 35s 49%)

What online or offline research did people do prior to their recent purchase?

Base: Internet users (accessing via computer, tablet or smartphone); Answering based on a recent purchase (n=185369); 16-34s (n=70407)

Research is undertaken shortly before purchase – a quarter of European people are motivated by an urgent need

When European people start researching products...

20% start researching moments before

19% hours before

16% weeks before

15% days before

9% months before



What motivates European people to purchase...

24% were motivated to purchase by a urgent need

19% a gift for oneself

18% a discount/promotion

16% a regular purchase

When did people start researching their product purchase?

What motivated people's product purchase?

Base: Internet users (accessing via computer, tablet or smartphone); Answering based on a recent purchase (n=185369)

Over a fifth of European people consider no brand in particular before buying a product

1

28% only considered one brand before purchasing a product

2

21% considered two

3

13% considered three

22% considered no brand in particular

How many brands did people consider before product purchase?

Base: Internet users (accessing via computer, tablet or smartphone); Answering based on a recent purchase (n=185369)

A quarter of online European discover relevant brands via the internet



52% compared products/prices/features

28% looked for opinions/reviews/advice

24% discovered relevant brands

23% got ideas/inspiration

How did people use the Internet to help make their purchase decision?

Base: Internet users (accessing via computer, tablet or smartphone); Answering based on a recent purchase and researched online (n=125758)

Europeans use the internet as a tool to make well informed purchase decisions

54%

compared choices

39%

**looked for early
inspiration and
made initial
discoveries**



36%

sought advice

34%

**prepared online for
immediate offline
purchase**

In which part(s) of the purchase process did people use the Internet?

Base: Internet users (accessing via computer, tablet or smartphone); Answering based on a recent purchase and researched online (n=125758)

- European people research products shortly before purchase to satisfy an immediate need, timely relevant advertising is key to getting their attention.
- With over a fifth of European people considering no brand in particular when researching and a quarter using the internet to discover relevant brands, online advertising can be used to shape preferences and influence decisions with appropriate messages at the awareness and research stages.
- Pre-purchase research is important to European people with 8 in 10 doing some form of research before purchase and with online nearly as important as offline research. Amongst under 35s, an online presence is particularly key to helping European people along their purchase process.

Research via connected devices

A computer is still top choice for product research but smartphones and tablets play an important role



87% use a computer for product research

71% only a computer



18% smartphone



11% tablet



Which devices did people use for product research?

Internet users (accessing via computer, tablet or smartphone); Answering based on a recent purchase and researched online (n=125758)

Smartphones are key to the awareness and consideration stages of the consumer purchase process



37% looked for early inspiration and made initial discoveries

33% sought advice

24% compared choices

23% prepared online for immediate offline purchase

In which part(s) of the purchase process did people use a smartphone?

Base: Internet users (accessing via computer, tablet or smartphone); Answering based on a recent purchase and researched online on a smartphone (n=28871)

A fifth of Europeans researching products on smartphones are discovering relevant brands



What kind of product research did people do on their smartphones?

Base: Internet users (accessing via computer, tablet or smartphone); Answering based on a recent purchase and researched online on a smartphone (n=28871)

- Whilst computers are still first choice for product research, other connected devices including smartphones and tablets play an important role for European people and therefore a cross-device strategy is important.
- A mobile presence is increasingly important for brands as European people turn to smartphones in the awareness and consideration stages for key information and to discover relevant brands.

Purchase behaviour

More than half buy offline and a third buy online



55% in store Under 35s 54%



31% online Under 35s 32%



5% phone Under 35s 5%



Where did people make their purchase?

Base: Internet users (accessing via computer, tablet or smartphone); Answering based on a recent purchase (n=185369)

While European people are happy to research on smaller screens, they find it easiest to use a computer to complete their purchases



89% used a computer

 95% Under 35s 85%
 93%



4% smartphone

 8% Under 35s 7%
 7%
 7%
 7%



4% tablet

 9% Under 35s 4%
 9%

Which devices did people use to make their online purchase?

Base: Internet users (accessing via computer, tablet or smartphone); Answering based on a recent purchase and bought online (n=72515)

Over a quarter of European people convert to online purchase after online research; 4 in 10 go on to purchase offline

Research

Purchase



41% research offline/purchase offline, under 35s 38%



33% research online/purchase offline, under 35s 38%



27% research online/purchase online, under 35s 28%



10% research offline/purchase online, under 35s 11%



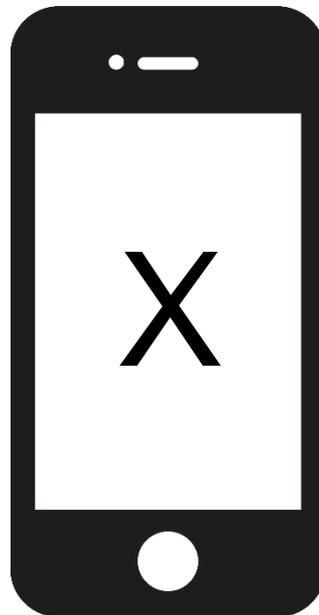
Did people research or purchase their product online or offline?

Base: All internet users (n=185369) and 16-34 year old internet users (n=70407) (accessing via computer, tablet or smartphone); Answering based on a recent purchase

Problems accessing websites on smartphones suggest room for improvement regarding mobile optimisation

49% have issues accessing websites via smartphones and after encountering issues...

50% use the same site on another device



27% find another site that works better on a smartphone

22% try the same site via a smartphone again at a later time

15% continue to use the same site on a smartphone

- With a third of Europeans purchasing online, brands and advertisers have an opportunity to build up awareness and secure consumer intent to purchase via digital channels. Enhancing their e-commerce experience is important to ensure consumers complete their purchases.
- Europeans find it easiest to use a computer to complete their purchase but are happy to research on smaller screens; if brands improve their mobile marketing offering to include user friendly mobile ecommerce sites and apps European people may convert to completing a transaction, from research to purchase stage, on one mobile device.
- Encountering problems with a mobile website drives people to another device or another site – poor mobile sites can lead to brands/retailers losing business and potentially going to a competitor.

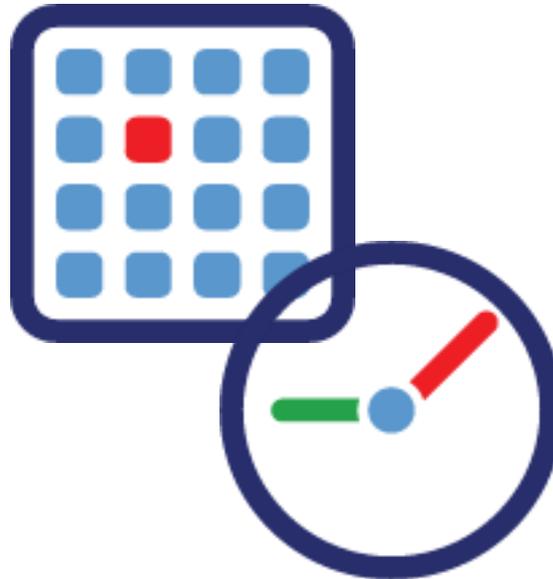
International purchases

Approximately 4 in 10 European internet users purchase products online from foreign countries at least once a year

41% at least once a year



11% less than once a year



37% have never bought products online from abroad

8% have bought products from abroad once

51% prefer to buy products from within their own country

How often do people purchase products online from foreign countries?

What attitudes do people have towards making online purchases from foreign countries?

Base: Internet users (accessing via computer, tablet or smartphone) and purchased online via computer, tablet or smartphone (n=80460)

Europeans are most likely to buy clothing, accessories or footwear from foreign countries

Top products purchased internationally...



37% purchase **clothing, accessories or footwear**



20% purchase **books, CDs, DVDs or games**



17% purchase **computer hardware, software or peripherals**



15% purchase **cosmetics, beauty or health products**

Which products have people purchased online from foreign countries?

Base: Internet users (accessing via computer, tablet or smartphone) and ever purchased a product / service online from abroad (n=51748)

Value for money is the main reason for buying from a foreign country

39% appealing offer

32% better availability

13% better quality of products



34% better conditions

26% broader range of products

12% recommendations from others

Why did people purchase products online from foreign countries?

Base: Internet users (accessing via computer, tablet or smartphone) and ever purchased a product / service online from abroad (n=51748)

- The majority of Europeans prefer to make purchases in their own country, however 4 in 10 do purchase products from foreign countries.
- Amongst those that purchase products internationally the key reason is value for money with 4 in 10 buying abroad due to an appealing offer and over a third for better conditions – including service, terms of payment, price.

Insights and recommendations

- A cross-device campaign and marketing portfolio can enable brands to better engage with their audiences during the purchase cycle – brands should ensure their websites are accessible across devices (mobile, tablet and desktop).
- Brands should decide how to follow the consumer journey and how to feedback the information from consumers to refine their strategy.
- Think about the intended audience and ensure a relevant online presence – more than half of Europeans go going online to compare products/prices/features and a quarter are discovering relevant brands.

- It is important to consider a cross-screen strategy and how online can work with other channels to engage with audiences as just as many European people find out about products via online advertising as they do TV advertising.
- The delivery of timely advertising and content is important as many Europeans start their product purchase cycle very shortly before purchasing. Online advertising can provide the opportunity to deliver relevant information to consumers at different stages of the purchase cycle to ensure effective outcomes in terms of sales or branding KPIs.

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