Consumer Barometer

Country Report – Vietnam
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What is the Consumer Barometer?

The Consumer Barometer 2015 is a tool to help you understand how people use the internet.
Executive Summary

The Top 3 Trends that define Vietnam
The 3 Trends in Vietnam

**The future is mobile**
The Vietnamese use a variety of devices with **smartphone being the most popular**. 1 out of 3 people are using their smartphone **while watching TV**, and they are looking at unrelated content.

**Today's shopper is an online shopper**
Many **purchases are online** today, but online research is also a **key driver in offline purchases**. Consumers use a variety of **devices**, meaning that advertisers can’t just rely on computer ads, but also need to focus on mobile.

**Millions of online video views**
More than 6 out of 10 young people are watching online video every day! Most consumers use online video to relax, but 50% actively want to learn something.
The Online and Multiscreen World

Quantify and understand internet usage and attitudes across various devices.
Where are the consumers? **Online!**

8 out of 10 of the Vietnamese consumers are online at least once a day.
Vietnam is online

Especially consumers under 34 years old are online often

How often do you go online? (%)

- Daily: 78%
- Weekly: 18%
- Monthly or less: 3%

Do you go online every day?

- Yes:
  - Under 25: 89%
  - 25-34: 87%
  - 35-44: 77%
  - 45-54: 54%
  - Over 55: 54%

- No:
  - Under 25: 11%
  - 25-34: 13%
  - 35-44: 23%
  - 45-54: 46%
  - Over 55: 46%

Source: The Connected Consumer Survey 2015
Base: Internet users (accessing via computer, tablet, or smartphone)
Why do people go online?

The consumers go online for personal reasons and to look for information

71% use the internet for personal reasons

Consumers state that the internet is the first place they look for information

77%
People are even online when they’re watching TV

The consumers are **online** while watching TV

- **36%** use devices to go online while watching TV
- **90%** use smartphones
- **13%** use computers
- **9%** use tablets

Source: The Connected Consumer Survey 2015
Question: Do people go online on their devices while watching TV?
Base: Internet users (accessing via computer, tablet or smartphone) | TV Viewers | Use Internet in Parallel to TV
Vietnam has more screens than ever

There are 1.4 devices connected to the internet per person in Vietnam in 2015.

This is a 75% growth from 2013

Source: The Connected Consumer Survey 2015
55% are smartphone users

Which devices do people use?

Tablet: 12%
Smartphone: 55%
Computer: 46%
How does Vietnam compare?

More than half of the consumers under 44 use a smartphone

Which devices do people use?

How does the demographics look?

Smartphone usage rate

- Under 25 years: 76%
- 25 - 34 years: 70%
- 35 - 44 years: 57%
- 45-54 years: 34%
- 55 and over: 19%

Source: The Connected Consumer Survey 2015
Base: total online and offline population
How do people use their smartphone?

What online activities do people do on their smartphones at least weekly?

- Listen to music: 43%
- Look up maps and directions: 13%
- Look for product information: 23%
- Purchase products/services: 6%
- Watch online videos: 54%
- Play games: 28%
- Check email: 23%
- Visit social networks: 59%
- Use search engines: 56%

Source: The Connected Consumer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone)
Search is mobile

6 out of 10 are using search engines via smartphones at least weekly

…making it crucial for businesses to think mobile.
The Smart Shopper

Focuses on the consumer purchase journey and the role of the Internet in making purchase decisions.
3 out of 4 go online when researching products

Did people do any online or offline research prior to their recent purchase?

Offline: 91%
Online: 73%

5% are researching online only.
In which industries are consumers researching online?

<table>
<thead>
<tr>
<th>Industry</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car Insurances</td>
<td>91%</td>
</tr>
<tr>
<td>Cinema Tickets</td>
<td>86%</td>
</tr>
<tr>
<td>Clothing &amp; Footwear</td>
<td>54%</td>
</tr>
<tr>
<td>Do it yourself</td>
<td>78%</td>
</tr>
<tr>
<td>Flight Tickets</td>
<td>94%</td>
</tr>
<tr>
<td>Groceries</td>
<td>47%</td>
</tr>
<tr>
<td>Ground Travels</td>
<td>86%</td>
</tr>
<tr>
<td>Hair Care</td>
<td>58%</td>
</tr>
<tr>
<td>Home appliances</td>
<td>80%</td>
</tr>
<tr>
<td>Home Furnishings</td>
<td>71%</td>
</tr>
</tbody>
</table>

Source: The Consumer Barometer Survey 2015
Question: Did people do any online or offline research prior to their recent purchase?
Base: Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories)
In which industries are consumers researching online? (continued)

<table>
<thead>
<tr>
<th>Industry</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel Stays</td>
<td>87%</td>
</tr>
<tr>
<td>Laptops</td>
<td>84%</td>
</tr>
<tr>
<td>Make-up</td>
<td>74%</td>
</tr>
<tr>
<td>Mobile Phones</td>
<td>83%</td>
</tr>
<tr>
<td>Music</td>
<td>74%</td>
</tr>
<tr>
<td>Personal Loans</td>
<td>79%</td>
</tr>
<tr>
<td>Real Estate</td>
<td>76%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>63%</td>
</tr>
<tr>
<td>Televisions</td>
<td>80%</td>
</tr>
<tr>
<td>Vitamins &amp; OTC Remedies</td>
<td>62%</td>
</tr>
</tbody>
</table>

Source: The Consumer Barometer Survey 2015
Question: Did people do any online or offline research prior to their recent purchase?
Base: Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories)
How are people researching?

The consumers use the internet to compare choices prior to purchase.

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

- Looked for early inspiration: 51%
- Compared choices online: 66%
- Sought advice online: 50%
- Prepared for immediate purchase*: 52%

What online sources did people use to make a purchase decision?

- Brand websites: 36%
- Retailer websites: 28%
- Search Engine: 70%

Source: The Consumer Barometer Survey 2015

*found where to buy/found location/made contact

Base: Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories)
Online advertising and research is essential

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

- Previous experience: 40%
- Other people: 13%
- Research: 12%
- Advertising: 10%
- Other: 25%

For 37% of the consumers online is the first source of product awareness during pre-purchase research.

What specific source informed people who first learned of their purchased product via product research?
Research leading to a purchase

Search engines are essential in the purchase decision

70%

Use a search engine to get informed before making a purchase.

| Source: The Consumer Barometer Survey 2015 |
| Base: Internet users (accessing via computer, tablet or smartphone) |
| Answering based on a recent purchase (in select categories) |

- Search engine: 70%
- Social networks: 26%
- Retailer websites: 28%
- Brand websites: 36%
- Online video sites: 17%
- Advice sites: 12%
- Price comparison sites: 11%
Smartphones and product research

Which devices did people use for product research? (Smartphone)

- **Under 25 years**: 44%
- **25-34 years**: 47%
- **35-44 years**: 45%
- **45-54 years**: 32%
- **55 and over**: 35%

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone)
Answering based on a recent purchase (in select categories)
Researched online
Smartphone users are more likely to purchase or research products online

Do you research or purchase online?

- **Smartphone Users**: 78%
- **Smartphone Non-Users**: 65%
How are smartphones used for online research?

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

- Looked for early inspiration: 42%
- Compared choices online: 43%
- Sought advice online: 47%
- Prepared for immediate purchase: 42%

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories) | Researched online on a smartphone
People are going mobile, but some issues occur

70% are experiencing issues when accessing websites via their smartphone.

And 37% find another website that works better on smartphone.

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via smartphone) | Encountered difficulties accessing websites via smartphone
19% shop online

Where did people make their purchase?

- 19% Online*
- 81% Offline/other

Source: The Consumer Barometer Survey 2015
*Online/Email
Base: Internet users (accessing via computer, tablet or smartphone) |
Answering based on a recent purchase (in select categories)
The Online Customer Journey

Online research

Online purchase

Offline purchase

73%

17%

56%

Source: The Consumer Barometer Survey 2015
Question: Did people do any online or offline research prior to their recent purchase?
Base: Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories)
## Consumer behavior in different ages

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Research online</th>
<th>Purchase offline</th>
<th>Research online</th>
<th>Purchase online</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 55 years</td>
<td>44%</td>
<td></td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>45-54 years</td>
<td>45%</td>
<td></td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>35-44 years</td>
<td>50%</td>
<td></td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>25-34 years</td>
<td>58%</td>
<td></td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Under 25</td>
<td>60%</td>
<td></td>
<td>20%</td>
<td></td>
</tr>
</tbody>
</table>

Source: The Consumer Barometer Survey 2015
Question: Did people research or purchase their product online or offline?
Base: Internet users (accessing via computer, tablet, or smartphone)
## Consumer behavior in various industries

<table>
<thead>
<tr>
<th>Category</th>
<th>Research online, purchase online</th>
<th>Research online, purchase offline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car Insurance</td>
<td>75%</td>
<td>17%</td>
</tr>
<tr>
<td>Cinema Tickets</td>
<td>68%</td>
<td>17%</td>
</tr>
<tr>
<td>Clothing &amp; Footwear</td>
<td>36%</td>
<td>18%</td>
</tr>
<tr>
<td>Do It Yourself</td>
<td>61%</td>
<td>18%</td>
</tr>
<tr>
<td>Flights (Leisure)</td>
<td>63%</td>
<td>2%</td>
</tr>
<tr>
<td>Groceries</td>
<td>46%</td>
<td>23%</td>
</tr>
<tr>
<td>Ground Travel</td>
<td>61%</td>
<td>6%</td>
</tr>
<tr>
<td>Hair Care</td>
<td>51%</td>
<td>18%</td>
</tr>
<tr>
<td>Home Appliances</td>
<td>62%</td>
<td>17%</td>
</tr>
<tr>
<td>Home Furnishings</td>
<td>54%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Source: The Consumer Barometer Survey 2015

Question: Did people research or purchase their product online or offline?

Base: Internet users (accessing via computer, tablet or smartphone)

Answering based on a recent purchase (in select categories)
Consumer behavior in various industries (continued)

- Research online, purchase online
- Research online, purchase offline

<table>
<thead>
<tr>
<th>Industry</th>
<th>Research Online, Purchase Online</th>
<th>Research Online, Purchase Offline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>50%</td>
<td>35%</td>
</tr>
<tr>
<td>Laptop</td>
<td>14%</td>
<td>71%</td>
</tr>
<tr>
<td>Make-up</td>
<td>13%</td>
<td>61%</td>
</tr>
<tr>
<td>Mobile Phones</td>
<td>20%</td>
<td>63%</td>
</tr>
<tr>
<td>Music</td>
<td>48%</td>
<td>11%</td>
</tr>
<tr>
<td>Personal Loan</td>
<td>68%</td>
<td>17%</td>
</tr>
<tr>
<td>Real Estate</td>
<td>57%</td>
<td>4%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>60%</td>
<td>9%</td>
</tr>
<tr>
<td>Television</td>
<td>71%</td>
<td>6%</td>
</tr>
<tr>
<td>Vitamins &amp; OTC</td>
<td>56%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: The Consumer Barometer Survey 2015
Question: Did people research or purchase their product online or offline?
Base: Internet users (accessing via computer, tablet or smartphone)
Answering based on a recent purchase (in select categories)
Easy to find, easy of purchase!

5 out of 10 of the consumers only consider 1-2 brands before purchase

...which makes it crucial for the brands to be top of mind
The Local Shopper

*The consumer purchase journey and the role of the internet for local business*
How does people research for local businesses?

66% Researched locally a day or less before visiting.

… and 75% only consider 1-3 local businesses before deciding where to buy.

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Searched for information about local business(es) in the past month
Local Shoppers research practical information

What information do people look for?

![Graph showing percentages for different types of information.]

- **Promotions**: 50%
- **Prices**: 66%
- **Business hours**: 28%

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet, or smartphone) who searched for information about local businesses in the past month.
5 out of 10* use a smartphone when looking for local information

Source: The Consumer Barometer Survey 2015
*54%
Base: Internet users (accessing via computer, tablet or smartphone) | Searched for information about local business(es) in the past month
The international Shopper

The consumer purchase journey and the role of online for international purchases
How big is international purchase?

Half of the consumers have made an international purchase

Which products do people purchase in other countries?

- Beauty and health: 26%
- Books, CDs, DVDs or games: 19%
- Clothing, accessories and footwear: 28%
- Computer Hardware: 23%

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Ever purchased a product/service online from abroad
Why do people purchase products online from foreign countries?

54% shop in foreign countries to get a better quality products

26% Expect more expensive delivery prices

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Ever purchased a product/service online from abroad
Challenges of international purchase

Most consumers have made an international purchase, but some issues occur:

- 5 out of 10 experience issues concerning the website usability.
- A common issue is that delivery time is too long.

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Ever purchased a product/service online from abroad
The Smart Shopper – Car insurance

The consumer purchase journey and the role of the internet in making their last purchase decision
Car insurance: Highlights

The consumers compare insurance policies online

Online research has a substantial impact on offline purchases

Search engines are a key driver in online purchase

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

- Compared choices: 63%
- Got ideas: 34%
- Look for opinions: 61%

Did people research or purchase their product online or offline?

- Researched online before purchasing offline: 75%

What online sources did people use to make a purchase decision?

- Brand websites: 56%
- Retailer websites: 29%
- Search Engine: 86%
- Price Comparison: 21%
Car insurance: Highlights

More than half are using their smartphone when researching car insurance

70% are encountering issues accessing websites via smartphone*

People will try to find another website that works better on their smartphone*

Which devices did people use for product research?

How often do people encounter issues accessing websites via smartphone?

What do people do after encountering issues accessing websites via smartphone?

53%

37%

Source: The Consumer Barometer Survey 2015

Based on 20 different categories: Car Insurance, Cinema Tickets, Clothing & Footwear, Do It Yourself (DIY), Flights (Leisure), Groceries, Ground Travel (Long Distance), Hair Care, Home Appliances, Home Furnishings, Hotels (Leisure), Laptop, Make-up, Mobile Phones, Music, Personal Loan, Real Estate, Restaurants, Television, Vitamins & OTC Remedies
The Smart Shopper – Cinema tickets

The consumer purchase journey and the role of the internet in making their last purchase decision
Cinema tickets: Highlights

Many consumers buy cinema tickets online

6 out of 10 of all purchases are made for a social gathering

17% Research online, purchased online
68% Research online, purchased offline

Where did people make their purchase?

What motivated people’s purchase?

Did people research or purchase their product online or offline?
Cinema tickets: Highlights

44% are using their smartphone when researching for cinema tickets

70% are encountering issues accessing websites via smartphone

People will try to find another website that works better on their smartphone

Which devices did people use for product research?

How often do people encounter issues accessing websites via smartphone?

What do people do after encountering issues accessing websites via smartphone?

Find another website

Source: The Consumer Barometer Survey 2015
*Based on 20 different categories: Car Insurance, Cinema Tickets, Clothing & Footwear, Do It Yourself (DIY), Flights (Leisure), Groceries, Ground Travel (Long Distance), Hair Care, Home Appliances, Home Furnishings, Hotels (Leisure), Laptop, Make-up, Mobile Phones, Music, Personal Loan, Real Estate, Restaurants, Television, Vitamins & OTC Remedies Base: Internet users (accessing via computer, tablet or smartphone)
The Smart Shopper – Clothing & footwear

The consumer purchase journey and the role of the internet in making their last purchase decision
Clothing & footwear: Highlights

The consumers research online prior to purchase

3 out of 10 the consumers use a smartphone to research clothing & footwear

54%

Research online

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

Which devices did people use for product research?

81%

30%

5%

Computer

Smartphone

Tablet

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories) | Researched online
Clothing & footwear: Highlights

18% of the consumers made their latest purchase online

The consumers research online and buy offline afterwards

More than half purchase clothing and footwear to meet an urgent need

Where did people make their purchase?

Did people research or purchase their product online or offline?

What motivated people’s product purchase?

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories) | Researched online
The Smart Shopper – Do it yourself

The consumer purchase journey and the role of the internet in making their last purchase decision
Do it yourself: Highlights

The internet has a substantial impact on purchase

78%

Research online / Purchase online

Research online / Purchase offline

Research offline / Purchase online

18%

61%

16%

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

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories) | Researched online
Do it yourself: Highlights

59% are using the internet for comparing prices and products

People make their purchase because they had an urgent need

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

What motivated people’s product purchase?

46%
The Smart Shopper – Flights (leisure)

The consumer purchase journey and the role of the internet in making their last purchase decision
Flights (leisure): Highlights

93% use search engines when purchasing flight tickets

94% of the consumers research flight tickets online

Among the consumers 63% buy flight tickets online

What online sources did people use to make a purchase decision?

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

Where did people make their purchase?

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories) | Researched online
Flights (leisure): Highlights

Consumers use airline websites to purchase flight tickets

The consumers compare flights online

63% of the consumers only research and purchase online

89% of the consumers only research and purchase online

69%

Compared choices

On what type of website did people make their online purchase?

Airline 89%
Travel Agent 8%

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

Did people research or purchase their product online or offline?

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories) | Researched online
The Smart Shopper – Groceries

The consumer purchase journey and the role of the internet in making their last purchase decision
Groceries: Highlights

In Vietnam the consumers use a smartphone for online research

61% use the Internet to compare prices

1 out of 4 buy their groceries on offer

Which devices did people use for product research?

- Compared prices: 61%
- Get Locations: 35%

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

What motivated people’s product purchase?
The Smart Shopper – Ground Travel

The consumer purchase journey and the role of the internet in making their last purchase decision
Ground travel: Highlights

8 out of 10 of the consumers use search engines for their purchase decision

9 out of 10 research online prior to purchase

61% of people both research online before purchasing offline

What online sources did people use to make a purchase decision?

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

Did people research or purchase their product online or offline?

83%

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) |
Answering based on a recent purchase (in select categories) |
Researched online
The Smart Shopper – Hair Care

The consumer purchase journey and the role of the internet in making their last purchase decision
Hair Care: Highlights

24% only consider one brand prior to purchase

...but 58% research online before making a purchase

The consumers use the internet to compare products and prices

How many brands did people consider before product purchase?

Did people research or purchase their product online or offline?

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

60%

Used the internet to make comparisons

Source: The Consumer Barometer Survey 2015

*Based on 20 different categories: Car Insurance, Cinema Tickets, Clothing & Footwear, Do It Yourself (DIY), Flights (Leisure), Groceries, Ground Travel (Long Distance), Hair Care, Home Appliances, Home Furnishings, Hotels (Leisure), Laptop, Make up, Mobile Phones, Music, Personal Loan, Real Estate, Restaurants, Television, Vitamins & OTC Remedies

Data: Internet users (accessing via computer, tablet or smartphone) | Answering based on
The Smart Shopper – Home appliances

The consumer purchase journey and the role of the internet in making their last purchase decision
Home appliances: Highlights

2 out of 10 purchases home appliances online

Where did people make their purchase?

The consumers compare products, prices and features online before purchase

82%

How did people use the Internet to help make their purchase decision?
Home appliances: Highlights

8 out of 10 consumers buy home appliances based on a urgent need

The consumers research their purchased products online

Online determines offline! 62% researched online before purchasing offline

80% research online prior to purchase

What motivated people’s product purchase?

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

Did people research or purchase their product online or offline?
The Smart Shopper – Home furnishings

The consumer purchase journey and the role of the internet in making their last purchase decision
Home furnishings: Highlights

The consumers’ purchases were driven by online research.

- 71% research online prior to purchase.
- 17% Research online, purchase online.
- 54% Research online, purchase offline.

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

Did people research or purchase their product online or offline?

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories) | Researched online
The Smart Shopper – Hotel (leisure)

The consumer purchase journey and the role of the internet in making their last purchase decision
Hotels (leisure): Highlights

1 out of 3 purchases their hotel stay online

87% research hotels online before purchase

…..but what online research are the consumers doing?

Where did people make their purchase?

Did people do any online or offline research prior to their recent purchase?

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

- Watch online video: 27%
- Compared choices: 68%
- Looked up reviews: 44%
Hotels (leisure): Highlights

Half the consumers research online prior to offline purchase

Did people research or purchase their product online or offline?

50%

Hotel chain websites is the most popular place to purchase hotel stays

On what type of website did people make their online purchase?

- Hotel chain: 29%
- Price comparison websites: 28%
- Travel Agent: 26%

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) |
Answering based on a recent purchase (in select categories) | Researched online
The Smart Shopper – Laptops

The consumer purchase journey and the role of the internet in making their last purchase decision
Laptops: Highlights

29% of the consumers purchase their laptop on promotion

...but 84% research online before making a purchase

And over half use smartphone for doing online research

What motivated people’s purchase?

Did people research or purchase their product online or offline?

Which devices did people use for product research?

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories) | Researched online
The Smart Shopper – Make-up

The consumer purchase journey and the role of the internet in making their last purchase decision
Make-up: Highlights

24% of the consumers purchase on promotion

Consumers research online prior purchase

61% of the consumers who makes a purchase in a store research online prior to purchase

74% Did online research before making a purchase

13% Research online/purchase online

61% Research online/purchase offline

What motivated people’s purchase?

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

Did people research or purchase their product online or offline?
Make-up: Highlights

42% are researching for make-up on their smartphone

70% are encountering issues accessing websites via smartphone

Many will try to find another website that works better on their smartphone

42%

Which devices did people use for product research?

How often do people encounter issues accessing websites via smartphone?

What do people do after encountering issues accessing websites via smartphone?

Source: The Consumer Barometer Survey 2015

*Based on 20 different categories: Car Insurance, Cinema Tickets, Clothing & Footwear, Do It Yourself (DIY), Flights (Leisure), Groceries, Ground Travel (Long Distance), Hair Care, Home Appliances, Home Furnishings, Hotels (Leisure), Laptop, Make-up, Mobile Phones, Music, Personal Loan, Real Estate, Restaurants, Television, Vitamins & OTC Remedies

Base: Internet users (accessing via computer, tablet or smartphone) | Answering based on recent purchase (in select categories) | Researched online
The Smart Shopper – Mobile phones

The consumer purchase journey and the role of the internet in making their last purchase decision
Mobile phones: Highlights

Did people research or purchase their product online or offline?

Did online research before making a purchase offline

82% are influenced by search engines when making a purchase decision

Online research is big

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories) | Researched online
Mobile phones: Highlights

26% are researching using their smartphone

Which devices did people use for product research?

23% are buying their mobile phones on a supermarket website

On what type of website did people make their online purchase?

- Supermarket: 44%
- Retailer: 20%
- Other: 13%
- Auction: 23%
The Smart Shopper – Music

The consumer purchase journey and the role of the internet in making their last purchase decision
Music: Highlights

53% of the consumers are purchasing music online.

74% research online before purchasing music.

5 out of 10 use a smartphone for doing online research.

Where did people make their purchase?

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

Which devices did people use for product research?
The Smart Shopper – Personal Loan

The consumer purchase journey and the role of the internet in making their last purchase decision
Personal Loan: Highlights

The consumers research online prior to taking out a loan

...and 75% do so via a search engine

...while 1 out of 10 end up making their purchase online

79%
Research online

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

What online sources did people use to make a purchase decision?

Where did people make their purchase?

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories) | Researched online
The Smart Shopper – Real Estate

The consumer purchase journey and the role of the internet in making their last purchase decision
Real Estate: Highlights

The consumers research online prior to purchasing real estate

76%
Research real estate online prior to purchase

57% use a smartphone for online research

57% of offline real estate sales begin online

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

Which devices did people use for product research?

Did people research or purchase their product online or offline?
The Smart Shopper – Restaurants

*The consumer purchase journey and the role of the internet in making their last purchase decision*
Restaurants: Highlights

- Restaurant guests are often motivated by a promotion/discount
- 50% use a smartphone for online research
- 63% of all sales are driven by online research

39%

What motivated people’s purchase?

Which devices did people use for product research?

What online or offline research did people do prior to their recent purchase?
The Smart Shopper – Television

The consumer purchase journey and the role of the internet in making their last purchase decision
The consumers use a search engine when making their purchase decision.

- 79% Used
- 21% Not used

What online sources did people use to make a purchase decision?

45% of the consumers use a smartphone for online research.

Which devices did people use for product research?

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories) | Researched online
Television: Highlights

The consumers use a variety of websites for their online purchases

- Supermarket: 39%
- Electronics Retailer: 38%
- Others: 23%

Online research has a substantial impact on offline purchase

71%

- Researched online before purchasing offline

20% bought their latest TV-set on promotion

Did people research or purchase their product online or offline?

On what type of website did people make their online purchase?

What motivated people's product purchase?

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories) | Researched online
The Smart Shopper – Vitamins & OTC remedies

The consumer purchase journey and the role of the internet in making their last purchase decision
Vitamins & OTC remedies: Highlights

Consumers use the internet to compare prices and products

53%

Compare products/prices online to make a purchase decision

40% researches just moments before Making their purchase

62% use the internet for research

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

When did people start researching their product purchase?

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

Source: The Consumer Barometer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) |
Answering based on a recent purchase (in select categories) | Researched online
The Smart Viewer

Provides insight into people's recent online video use across different devices.
The Smart Viewer is a Mobile Viewer

9 out of 10 consumers are watching online video on their smartphones*

*At least once a month
Base: Internet users (accessing via smartphone)
The users watch online video at home and alone

89% of the consumers are watching online video at home

6 out of 10 watch online video alone

Source: The Connected Consumer Survey 2015
*Question: With how many people did you watch video in the last week?
Base: Internet users (accessing via computer, tablet or smartphone) | Watched online video in the past week | Answering based on a recent online video session
Why are we watching online video?

7 out of 10 of the consumers are watching videos because they want to relax.

What motivated people to watch online videos in the last week?

- To relax: 67%
- To be entertained: 65%
- To learn: 46%
- To pursue a hobby: 41%
- Find product information: 30%

Source: The Connected Consumer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Watched online video in the past week | Answering based on a recent online video session
78% Of the users are watching **Online video** every week

**What are the users watching?**

- **57%** are watching music videos
- **22%** are watching gaming videos
- **28%** are watching sport

Source: The Connected Consumer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Watched online video in the past week | Answering based on a recent online video session
Long videos in the evening

47% of the consumers watch videos that are 10 minutes or longer

10:00

How long were the online videos people watched in the last week?

Most people are watching online video in the evening

At what time did people watch online video in the last week on a weekday?

Source: The Connected Consumer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Watched online video in the past week | Answering based on a recent online video session weekday
5 out 10 watch online video content related to their surroundings

68% are focused when watching online video

Source: The Connected Consumer Survey 2015
Base: Internet users (accessing via computer, tablet or smartphone) | Watched online video in the past week | Answering based on a recent online video session
Methodology

Data in the Consumer Barometer is pulled 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.
Consumer Barometer 2015
Methodology

Connected Consumer Survey

Population
- Target population: total population (online & offline) 16+ in each country surveyed except:
  - 18+ in Argentina, Brazil, China, India, South Korea, Malaysia, Mexico, Philippines, Vietnam, Japan

Sampling
- Random sampling aimed to be representative of the total population ages 16+ in all countries.
- Sample size: n=1,000 in each country surveyed (except India, where n=4,000)

Survey administration
- Survey data was collected in all countries via telephone (CATI) or face-to-face interviewing (CAPI/PAPI).
- Questionnaires were administered in local language(s) for all countries surveyed
- Interview length was 25 min. on average for telephone interviews and 30 minutes for face-to-face interviews.

Weighting
- Data was weighted according to local Census data

Timing
- Enumeration surveys were administered between in Q1 2014 and 2015.
Consumer Barometer 2015

Methodology

Consumer Barometer Survey

Population
Target population: online population who use at least one connected device and made a purchase of at least one of the relevant products from the product list. Depending on the country we focused on the population 16+ except:
- Argentina, Brazil, China, India, South Korea, Malaysia, Mexico, Philippines, Vietnam, the US, Japan

Sampling
- Sample size was set at a minimum of n=3,000 in each country except some Asian and African countries
- Quotas were applied in the sampling process with regard to age, gender, educational level and region as well as online activities and smartphone usage to ensure local representativeness for the online population

Survey administration
- Surveys were conducted through online panels, face-to-face or a combined method of online panel and face-to-face interviews
- Questionnaires were administered in local language(s) for all countries surveyed
- Questionnaire length was 20 minutes for online-surveyed markets, 40 minutes for face-to-face countries

Weighting
- The reported data was weighted against the Connected Consumer Survey. Bases displayed are unweighted

Timing
- Consumer Barometer surveys were administered in 2014 and 2015.
THANK YOU!

CONTACTS: