

Consumer Barometer

Country Report – France

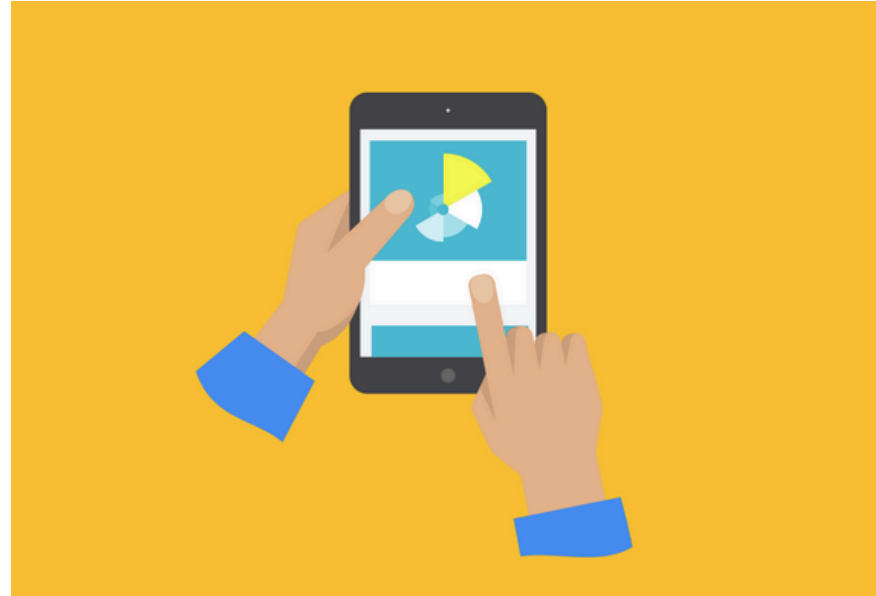


Table of Content

Where to find what



The Multiscreen World

- Internet usage 06-10
- Devices 11-15

The Smart Shopper

- Research behavior 16-26
- Purchase behavior 27-32
- Local shopper 33-36
- International 37-40
- Industries 41-90

The Smart Viewer

- Online Video 91-97

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 France

The 3 Trends in France



The future is **mobile**

8 out of 10 in France are online at least once a day. Especially consumers under 34 years old are online often.



Today's **shopper** is an **online shopper**

More than every second of all sales – online or offline – are driven by **online research**. 45% of all French consumers, who conducted online research used a search engine prior to a recent purchase.



Millions of **online video** views

5 out of 10 watch online video because they **want to be entertained**. 57 % of the French consumers prefer watching videos shorter than 5 minutes.



The Online and Multiscreen World

Quantify and understand internet usage and attitudes across various devices.

Where are the consumers? **Online!**

8 out of 10

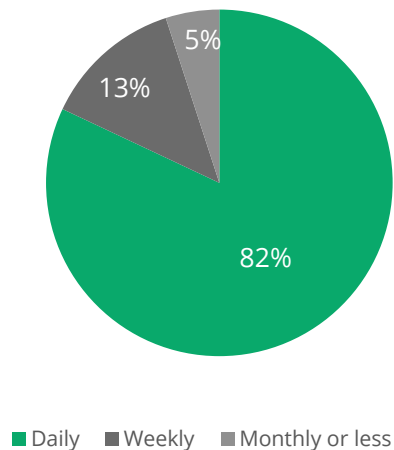
of the consumers
are online at least once a day



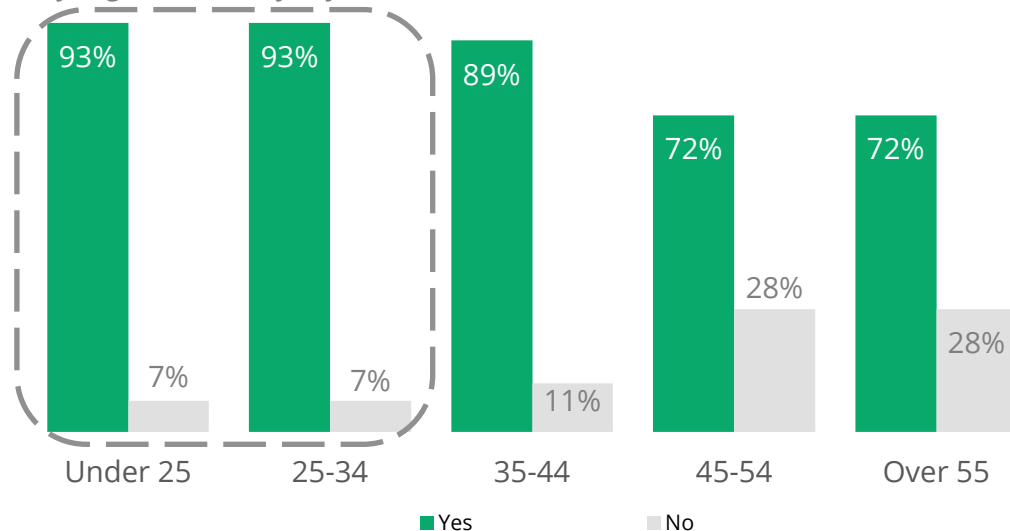
France is online

Especially consumers under 34 years old are online often

How often do you go online?



Do you go online every day?



Why do people go online?

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

80 % use the internet for personal reasons

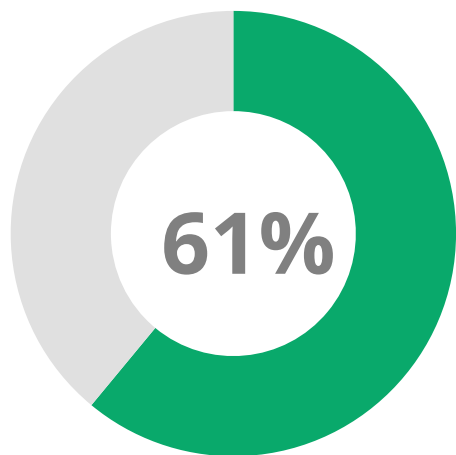


Consumers state that the internet is the first place they look for information*

83%

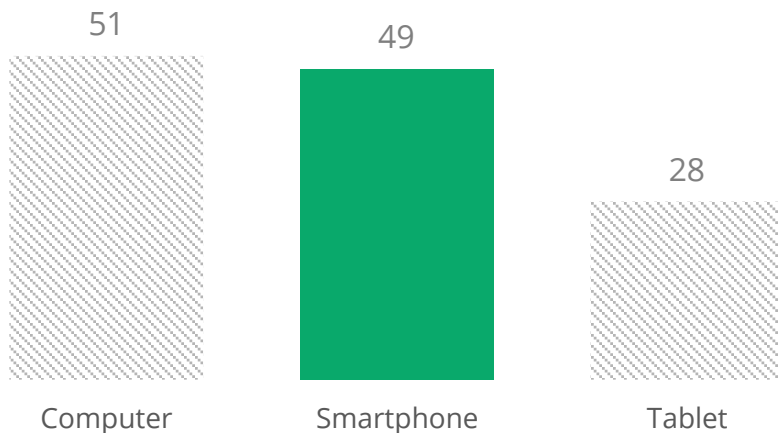
People are even online when they're watching TV

The consumers are **online** while watching TV



Use devices to go online while watching TV

Which devices do people use to go online while watching TV



France has more screens than ever



2,5
devices pr. person



There are 2,5 devices connected to the internet pr. person in France in 2015.

This is a 9 % growth from 2013.

3 out of 5 have a smartphone

Which devices do people use?

Tablet



32%

Smartphone



62%

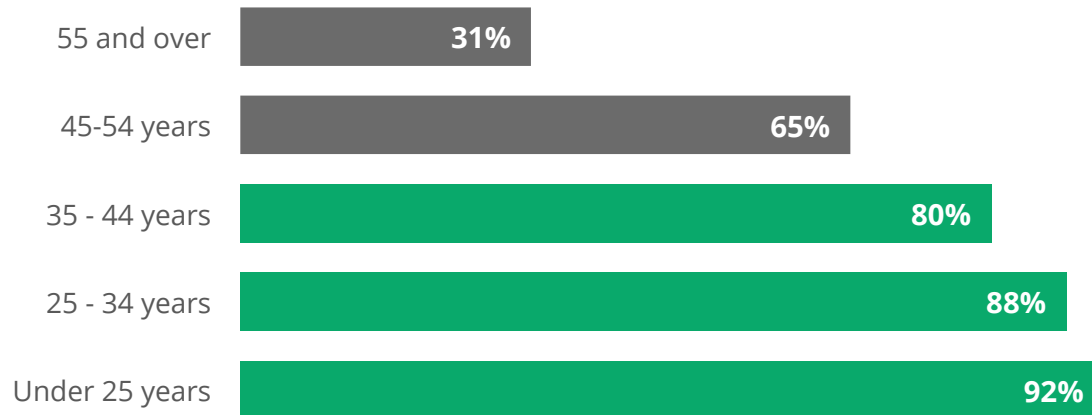
Computer



74%

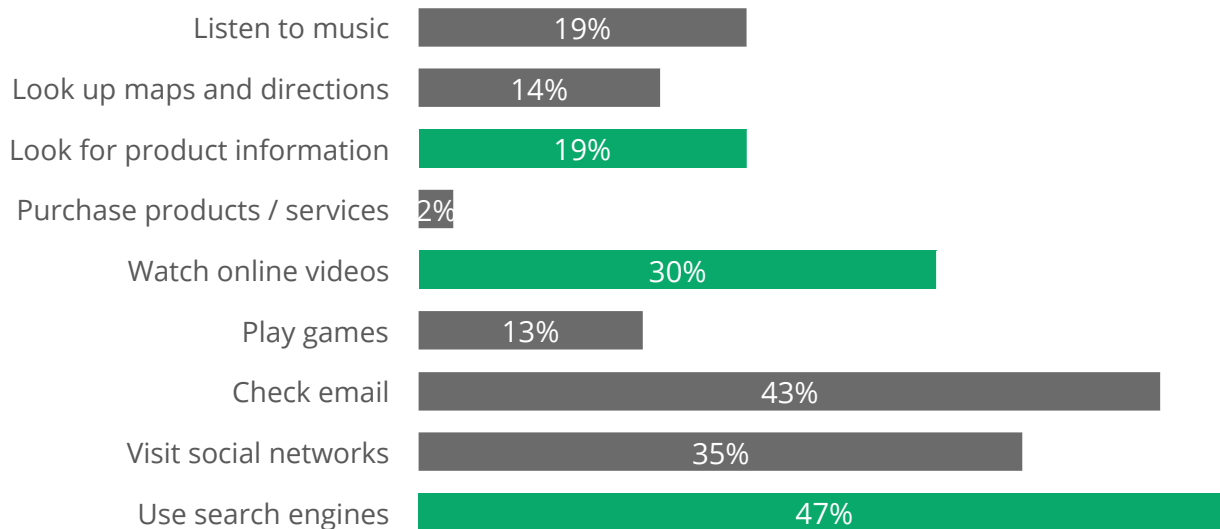
The young French are mobile

Smartphone usage rate



How do people use their smartphone?

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



Search is mobile



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

...making it crucial for businesses to think mobile.

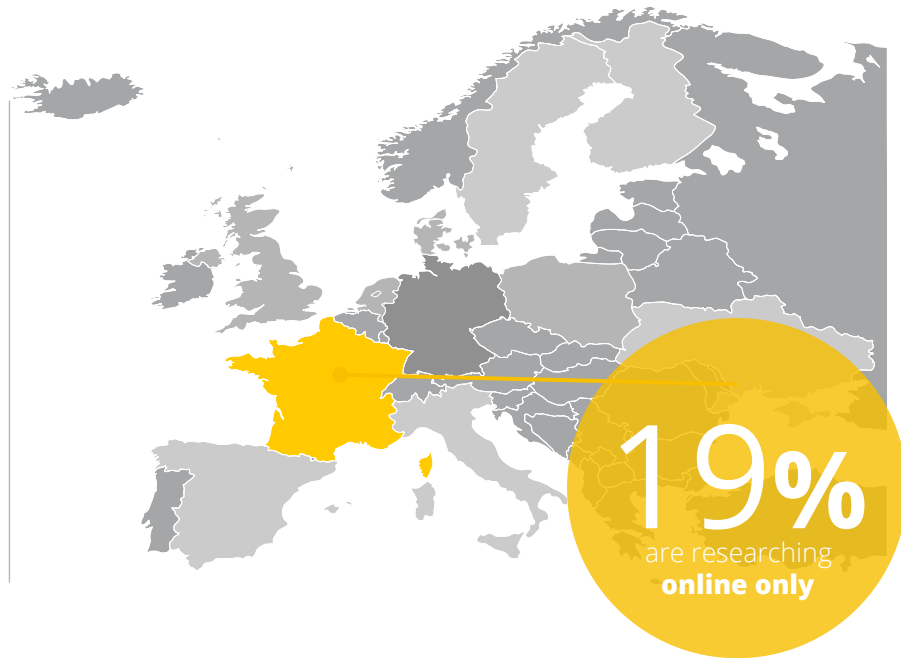


The Smart Shopper

Focuses on the consumer purchase journey and the role of the Internet in making purchase decisions.

Many consumers prefer **online** research

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



In which industries are consumers researching online?

Car Insurances



Cinema Tickets



Clothing & Footwear



Do it yourself



Flight Tickets



Groceries



Ground Travels



Hair Care



Home appliances



Home Furnishings



In which industries are consumers researching online? (continued)

Hotel Stays



Laptops



Make-up



Mobile Phones



Music



Personal Loans



Real Estate



Restaurants



Televisions



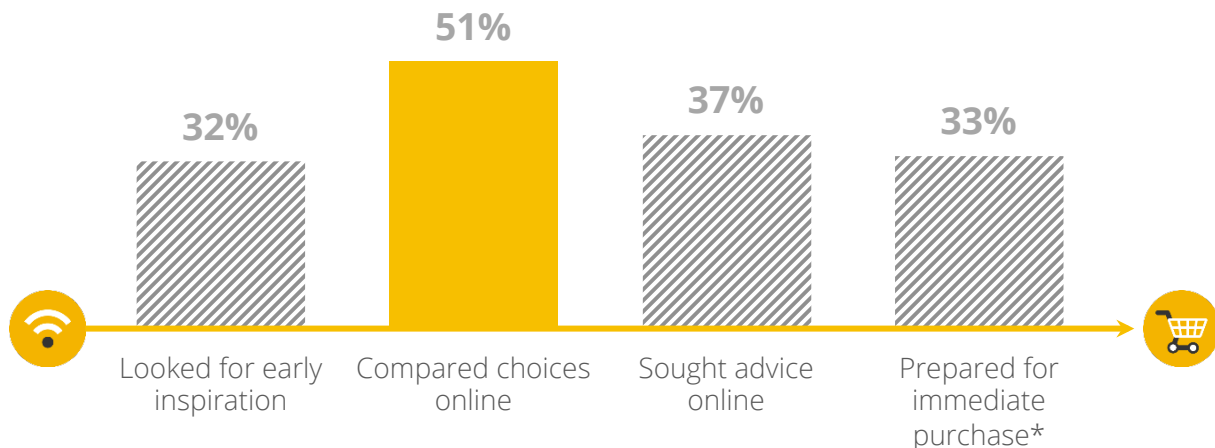
Vitamins & OTC Remedies*



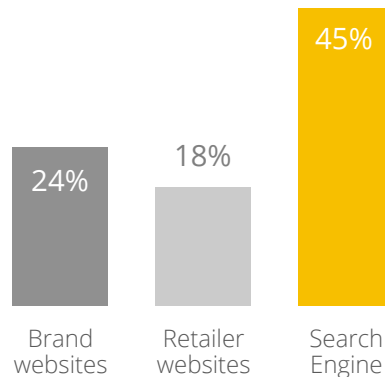
How are people researching?

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

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

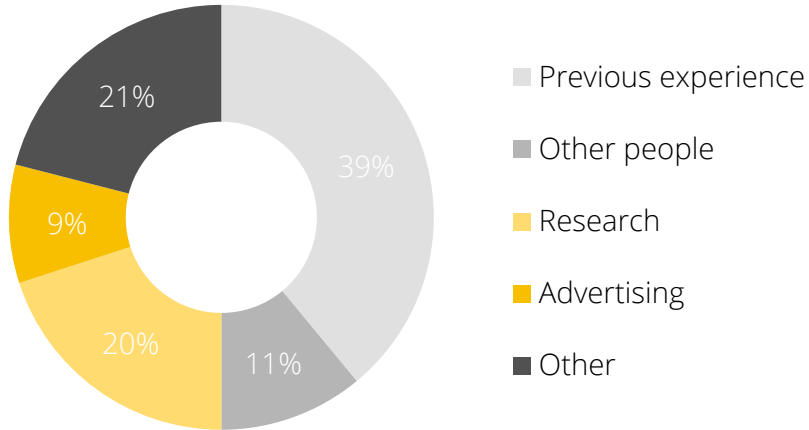


What online sources did people use to make a purchase decision?



Online advertising and research is essential

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



For 60% of the consumers online is the first source of product awareness during pre-purchase research.

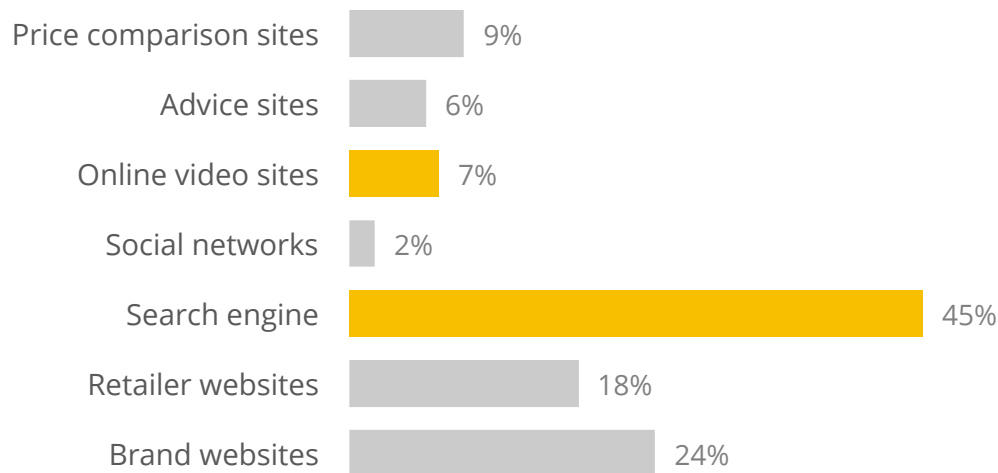
What specific source informed people who first learned of their purchased product via product research?

Research leading to a purchase

Search engines are essential in the purchase decision

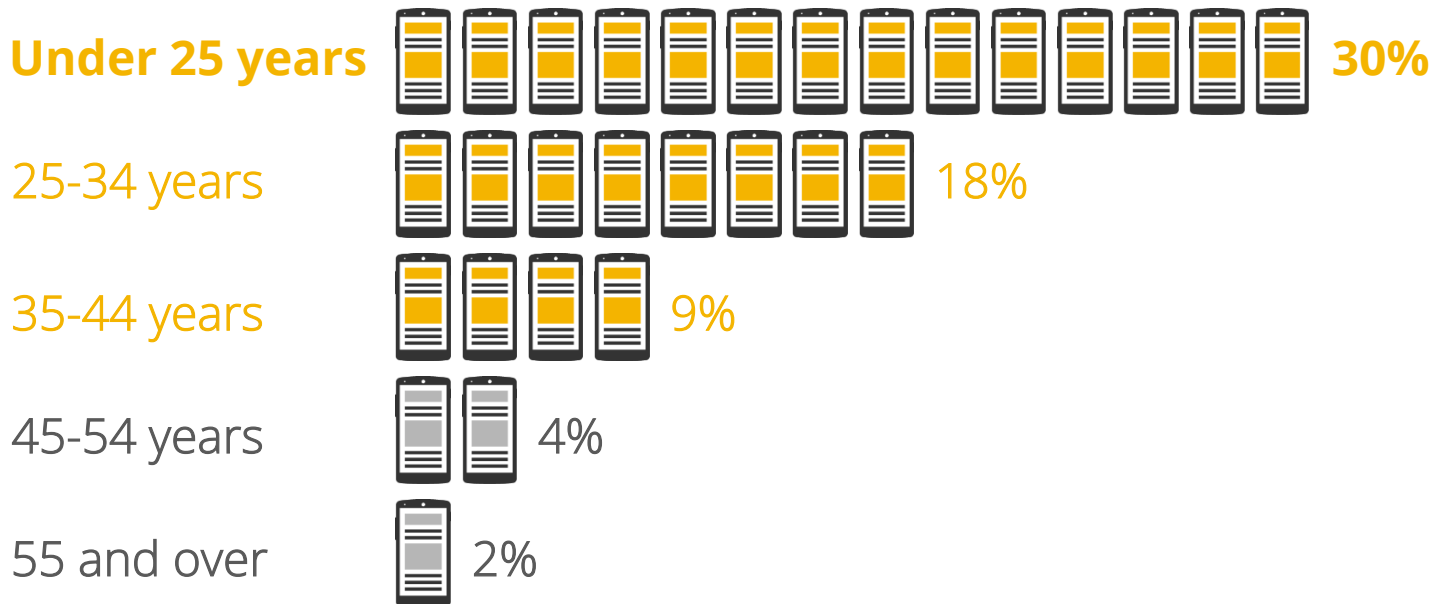
45% 

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



Smartphones and product research

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



Smartphone users are online users

Smartphone users are more likely to purchase or research products online

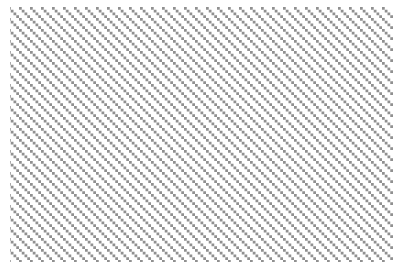
How many people research or purchase online?

64%



Smartphone Users

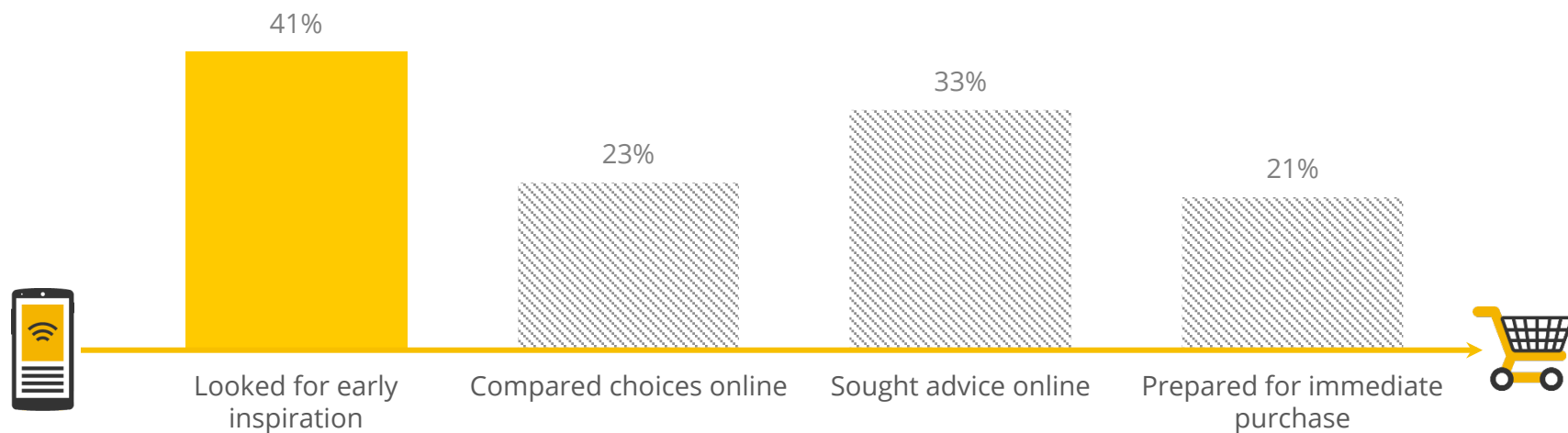
54%



Smartphone Non-Users

How are smartphones used for online research?

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



People are going mobile, but some issues occur

38% 

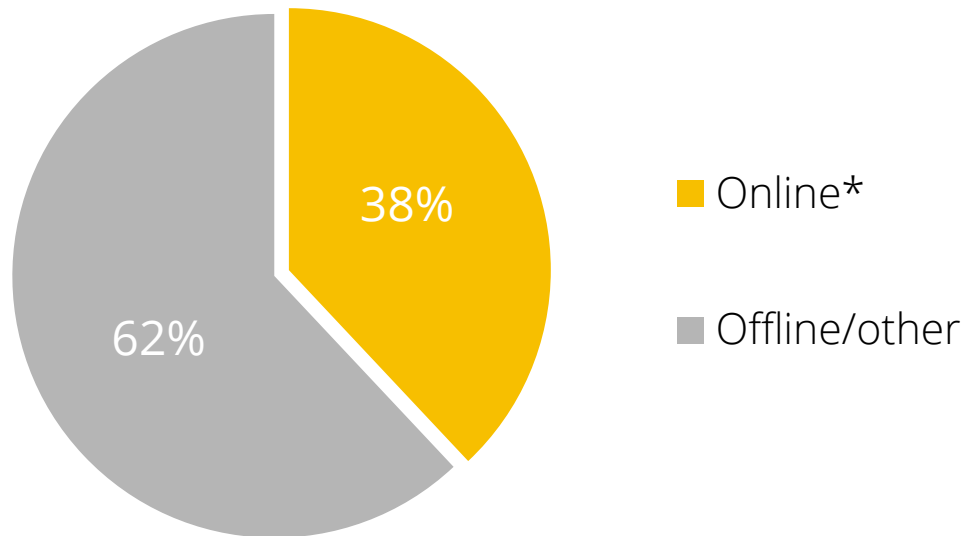
are experiencing issues when accessing websites via their smartphone



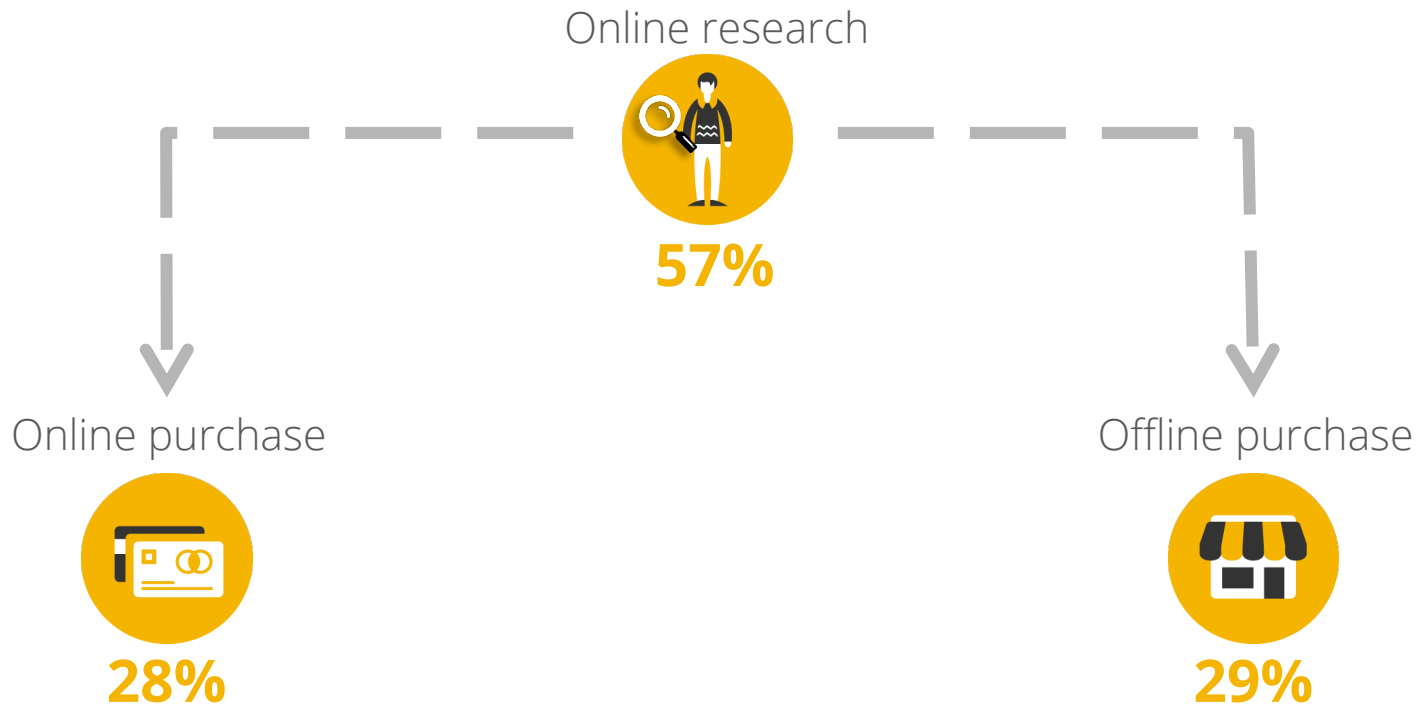
And 20% find another website that works better on smartphone

Many prefer online shopping

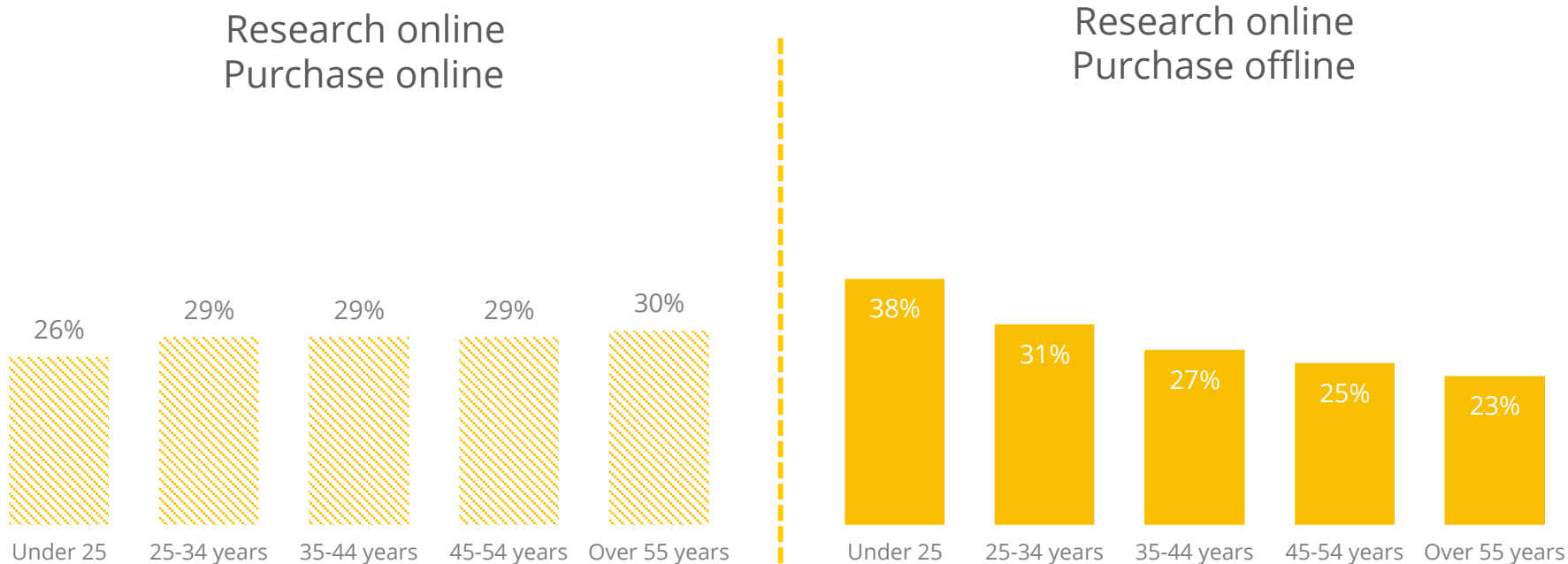
Where did people make their purchase?



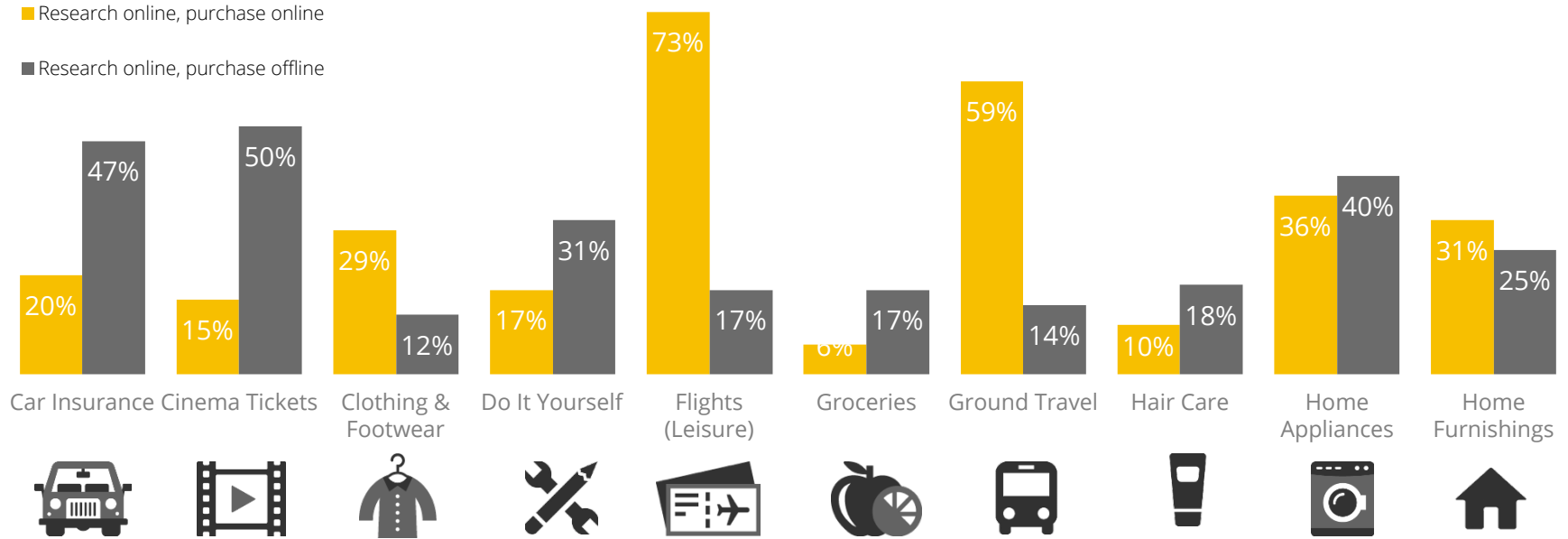
The Online Customer Journey



Consumer behavior in different ages



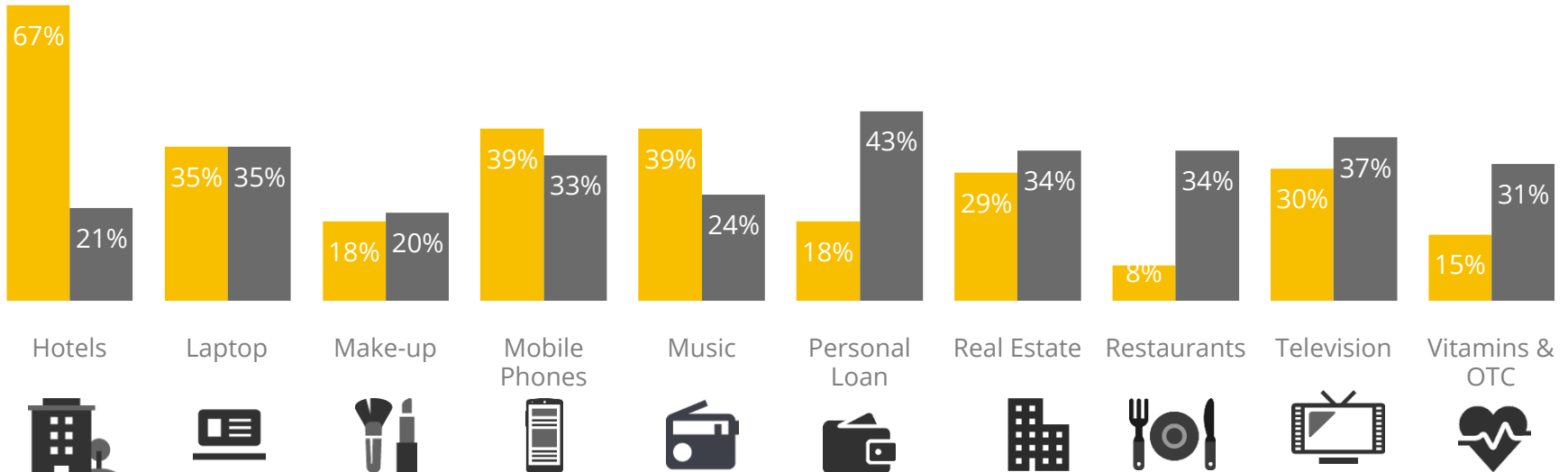
Consumer behavior in various industries



Consumer behavior in various industries (continued)

■ Research online, purchase online

■ Research online, purchase offline



Easy to find, easy of purchase!

7 out of 10

of the consumers
only consider 1-3 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

Local Behavior

How does people research for local businesses?

66%

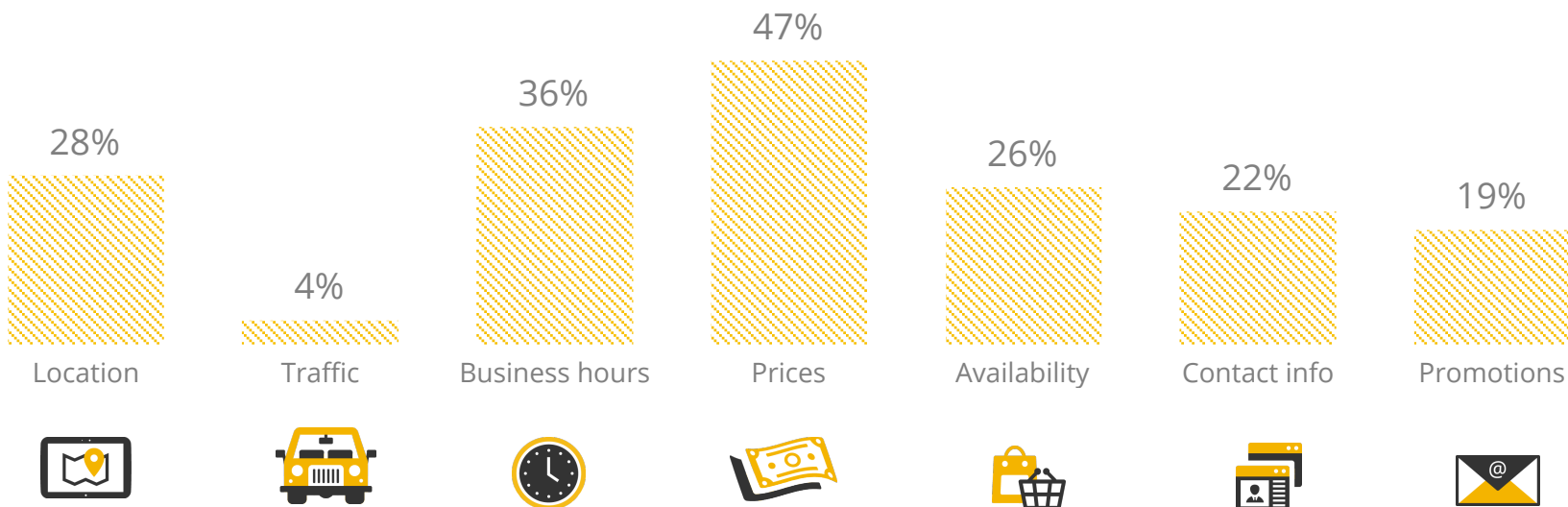


Researched locally
a day or less before
visiting.

... and 86 % only consider 1-3
local businesses before deciding
where to buy.

Local Shoppers research practical information

What information should a local business have on their website?



Smartphones and local business

2 out of 10 use a smartphone when looking for local information





The international Shopper

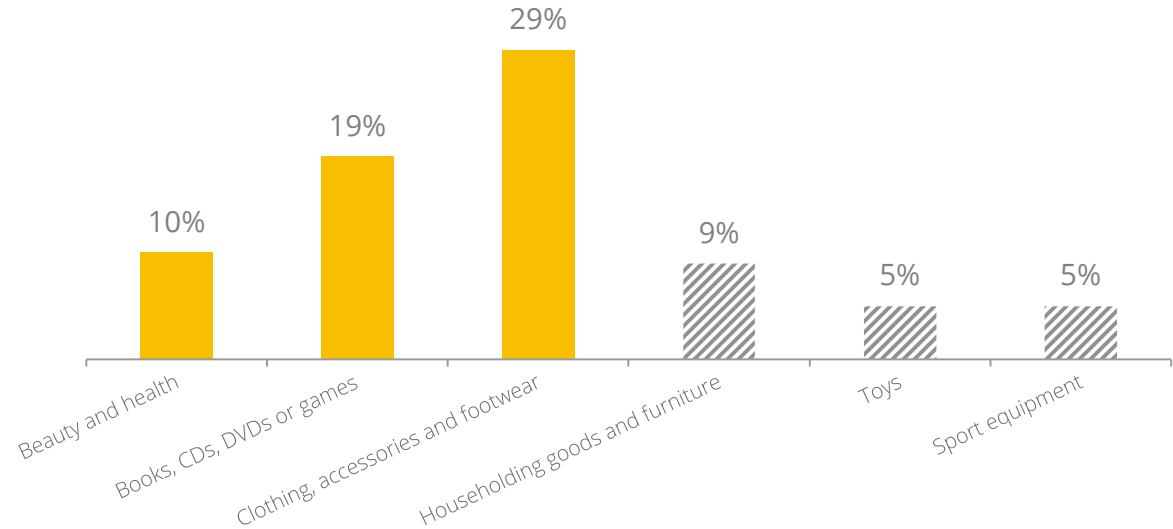
The consumer purchase journey and the role of online for international purchases

How big is international purchase?

54 % of the consumers
have made an
international purchase



Which products do people purchase in other countries? (most commonly)



Why do people purchase products online from foreign countries?

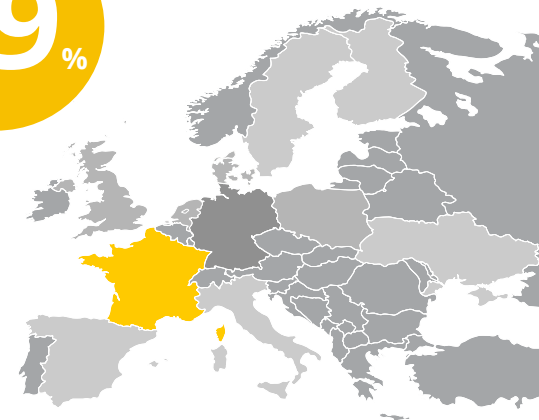
44 % buy from foreign countries because they receive an **appealing offer**



30 % shop in foreign countries to get better conditions (service, terms of payment or price)

Are willing to accept longer delivery time.

19 %



Challenges of international purchase

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

3 out of 10 experience issues concerning the website usability

The most common issue is that websites seem insecure



30% 



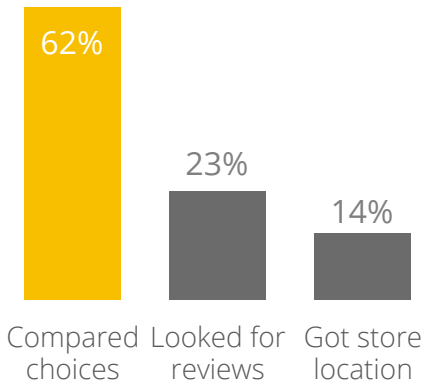
The Smart Shopper – Car insurance

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



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

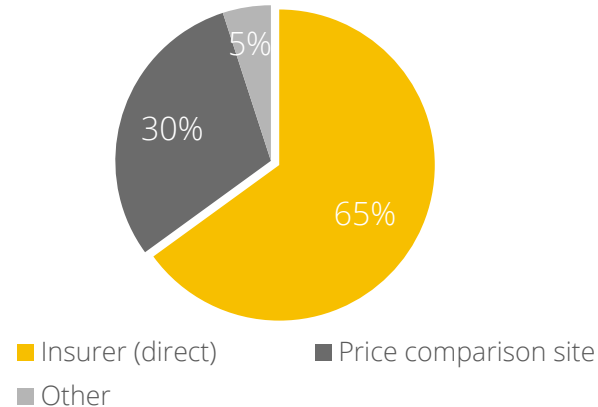
Online research has a substantial impact on offline purchases



Researched online before purchasing offline

Did people research or purchase their product online or offline?

The insurer's website is a **key driver** in online purchase



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



Car insurance: Highlights

People are using their **smartphone** when researching for car insurance

12%

Which devices did people use for product research?

But **38 %** are encountering issues accessing websites via smartphone*



How often do people encounter issues accessing websites via smartphone?

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

20%

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



The Smart Shopper – Cinema tickets

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



Cinema tickets: Highlights

The consumers
buy cinema tickets online



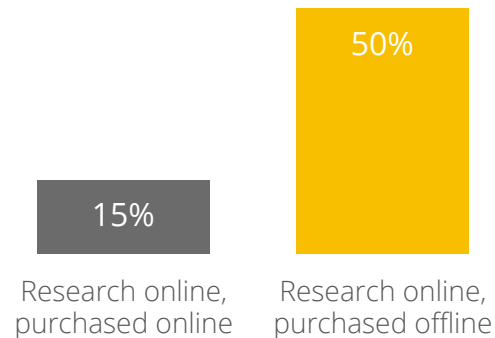
Where did people make their purchase?

2 out of 10 consumers
purchase on promotion



What motivated people's purchase?

65 % of the consumers
did online research



Did people research or purchase their product online or offline?



Cinema tickets: Highlights

21 % are using their **smartphone** when researching for cinema tickets



Which devices did people use for product research?

38% are encountering issues accessing websites via smartphone*



How often do people encounter issues accessing websites via smartphone?

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

20%

Find another website

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



The Smart Shopper – Clothing & footwear

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



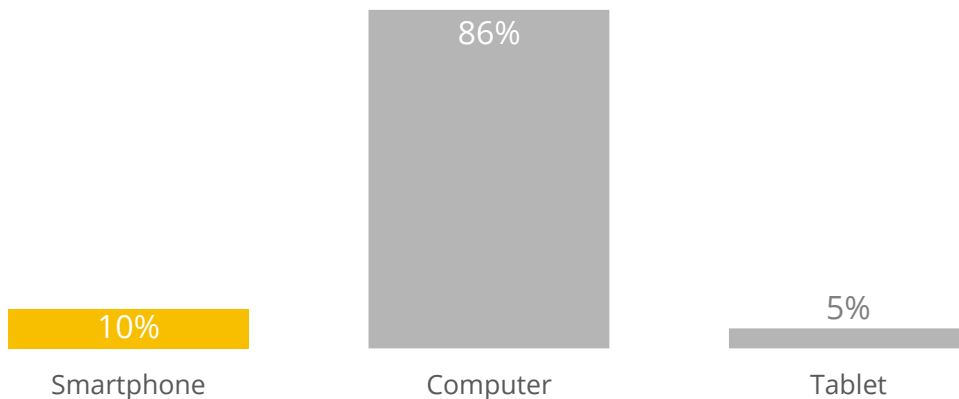
Clothing & footwear: Highlights

The consumers do **online research** prior to purchase

41 %

Research online

1 out of 10 consumers use a **smartphone to research** clothing & footwear



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

Which devices did people use for product research?



Clothing & footwear: Highlights

Many consumers
purchase online (46 %)

Store purchases
begin online

Consumers purchase clothing
and footwear on promotion



Where did people make their purchase?



*Did people research or purchase
their product online or offline?*



What motivated people's product purchase?



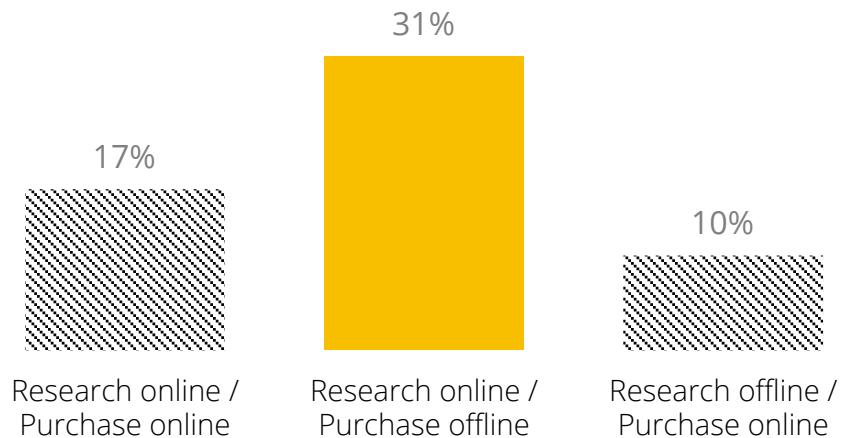
The Smart Shopper – Do it yourself

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



Do it yourself: Highlights

Offline purchases **begin online**



Did people research or purchase their product online or offline?

The internet has a substantial impact on **purchase**

48%

Does online research prior to purchase

Did people research or purchase their product online or offline?



Do it yourself: Highlights

48 % are using the internet for comparing prices and products



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

40% make their purchase because they had an urgent need

40%

What motivated people's product purchase?



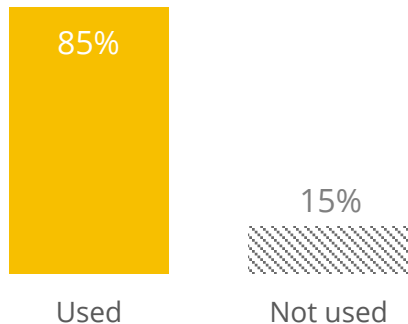
The Smart Shopper – Flights (leisure)

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



Flights (leisure): Highlights

85% use search engines when purchasing flight tickets



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

90% of the consumers research flight tickets online



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

Among the consumers

80%

buy flight tickets online

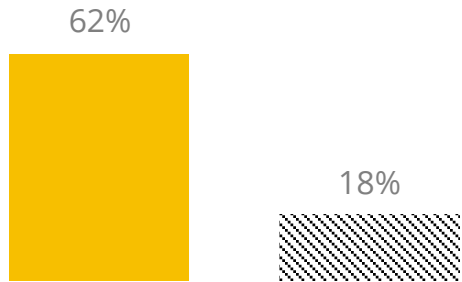


Where did people make their purchase?



Flights (leisure): Highlights

The consumers use **airline websites** to purchase flight tickets



■ Airline ■ Price comparison website

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

The consumers **compare prices online**



Compared choices online

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

73 % of the consumers **only research and purchase online**



Did people research or purchase their product online or offline?



The Smart Shopper – Groceries

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



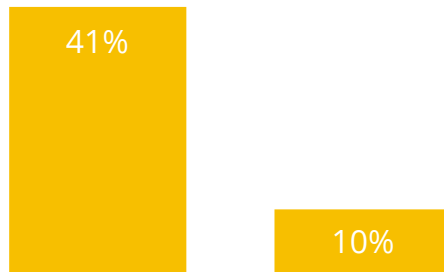
Groceries: Highlights

In France 16 % of the consumers use a smartphone for online research



Which devices did people use for product research?

People use the Internet to compare prices

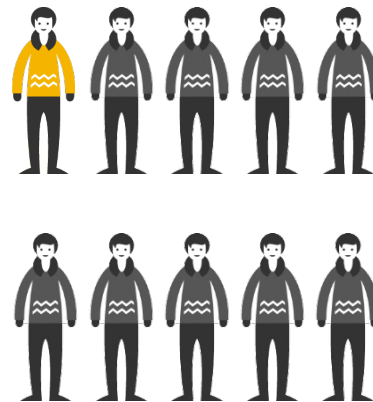


Compared prices

Got ideas

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

12 % buy their groceries on offer



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

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



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

7 out of 10 research online prior to purchase



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

59 % of people both research and purchase online only



Did people research or purchase their product online or offline?



The Smart Shopper – Hair Care

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



Hair Care: Highlights

39 % only consider one brand prior to purchase



How many brands did people consider before product purchase?

...but 28 % does online research before making a purchase



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

The consumers use the internet to compare products and prices

25%

Used the internet to make comparisons

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



The Smart Shopper – Home appliances

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



Home appliances: Highlights

4 out of 10 purchases home appliances online



Where did people make their purchase?

The consumers compare products, prices and features online before purchase

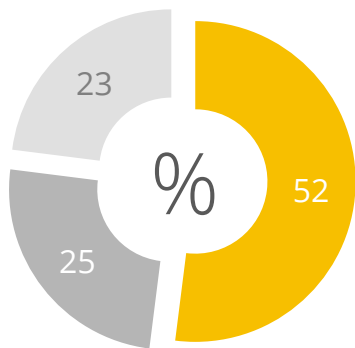


How did people use the Internet to help make their purchase decision?



Home appliances: Highlights

Consumers buy home appliances based on a urgent need or on discount/promotion



■ Urgent need ■ Promotion
■ Other

What motivated people's product purchase?

The consumers research their purchased products online

76%

Do online research prior to purchase

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

Online determines offline!
40 % researched online before purchasing offline



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

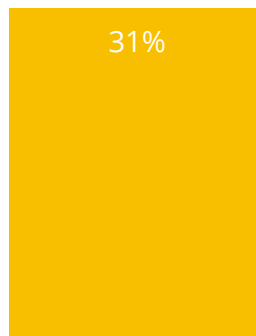
The consumers' purchases were driven by **online research**

55%

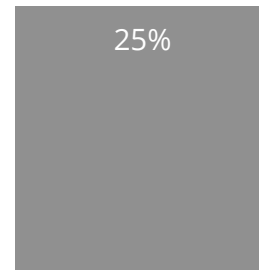
Do online research prior to purchase

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

Online research effect both online and offline sales



Research online, purchase online



Research online, purchase offline

Did people research or purchase their product online or offline?



The Smart Shopper – Hotel (leisure)

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

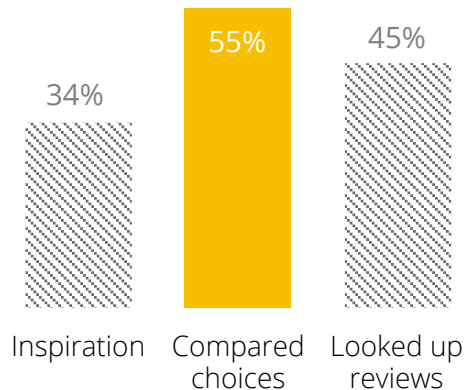


Hotels (leisure): Highlights

4 out of 5 purchases their hotel stay online

89% research hotels online before purchase

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



Where did people make their purchase?

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

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



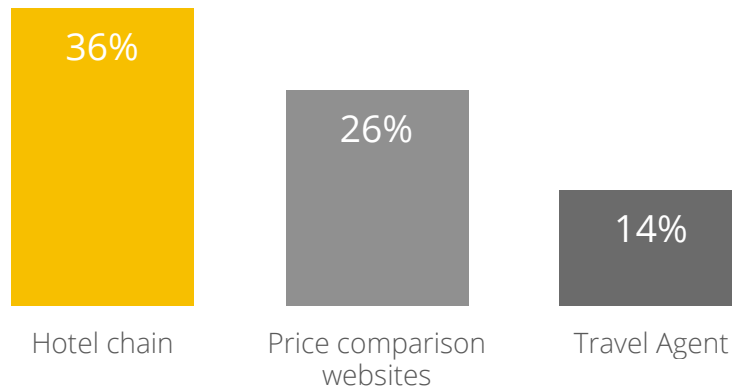
Hotels (leisure): Highlights

Many consumers
research and purchase
online only

67%

Did people research or purchase their product online or offline?

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



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



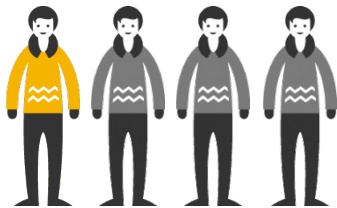
The Smart Shopper – Laptops

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



Laptops: Highlights

26 % of the consumers purchase their laptop on promotion



What motivated people's purchase?

...but 71 % does online research before making a purchase



Did people research or purchase their product online or offline?

1 out of 5 use a smartphone for doing online research



Which devices did people use for product research?



The Smart Shopper – Make-up

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



Make-up: Highlights

28 % of the consumers purchase on promotion

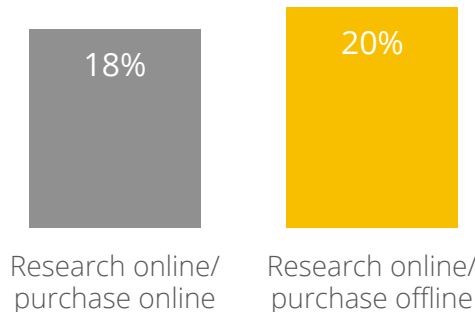


Consumers do online research prior purchase

38%

Did online research before making a purchase

20% of the consumers who makes a store purchase does online research prior to purchase



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?



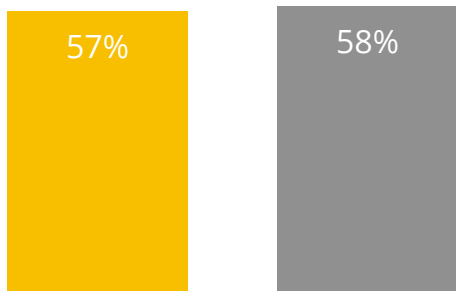
The Smart Shopper – Mobile phones

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



Mobile phones: Highlights

Online goes head-to-head with offline research



Online

Offline

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

Offline sales begin online.

33%

Did online research before making a purchase offline

Did people research or purchase their product online or offline?

62% are influenced by search engines when making a purchase decision



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



The Smart Shopper – Music

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



Music: Highlights

61 % of the consumers are purchasing music online

61 %

Where did people make their purchase?

64 % does online research before purchasing music



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

1 out of 5 use a smartphone for doing online research



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
does online research
prior to taking out a loan

61%

Research online

...and 48% do so via
a search engine



...while 2 out of 10 end up making
their purchase 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?



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
does online research
prior to purchasing real estate

65%

Research real estate online
prior to purchase

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

18 % use a **smartphone**
for online research



*Which devices did people use
for product research?*

34 % of offline real estate
sales **begin online**



*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

31 % use a smartphone
for online research



*Which devices did people use
for product research?*

43 % of all sales are
driven by online
research



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



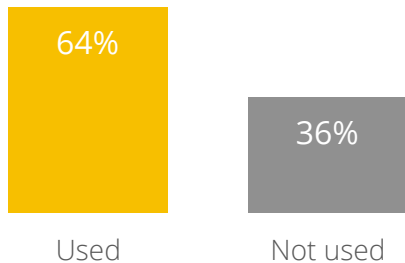
The Smart Shopper – Television

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



Television: Highlights

The consumers use a search engine when making their purchase decision



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

22 % state that their purchases were motivated by a promotion



What motivated people's purchase?

9 % of the consumers use a smartphone for online research.

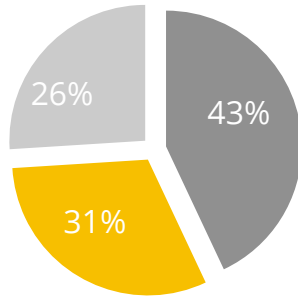


Which devices did people use for product research?



Television: Highlights

The consumers use **electronics retailer websites** for their online purchases



■ Retail ■ Department Store ■ Others

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

Online research has a substantial impact on **offline purchase**

37%

Researched online before purchasing offline

Did people research or purchase their product online or offline?



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

29%

Compare products/prices online to make a purchase decision

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

47% researches just moments before making their purchase



When did people start researching their product purchase?

17% use the internet for making their purchase



Where did people make their purchase?



The Smart Viewer

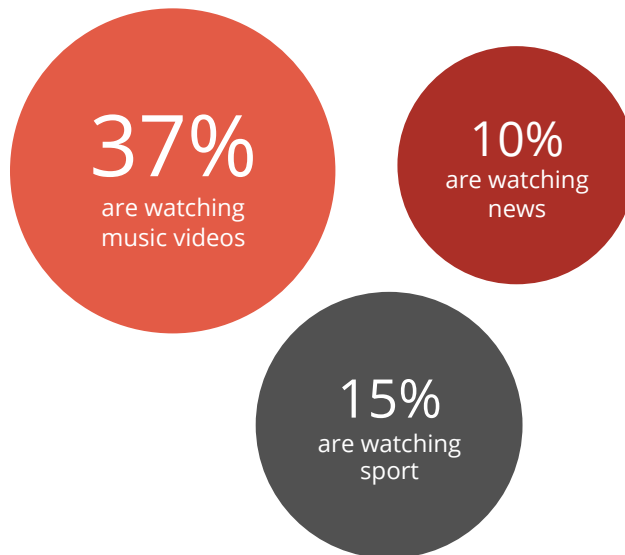
Provides insight into people's recent online video use across different devices.

Tomorrow's TV is Online

58%

Of the users are watching
Online video every week

What are the users watching?




The Smart Viewer is a Mobile Viewer

7 out of 10

consumers
are watching online video
on their smartphones*



The users watch online video at home and alone

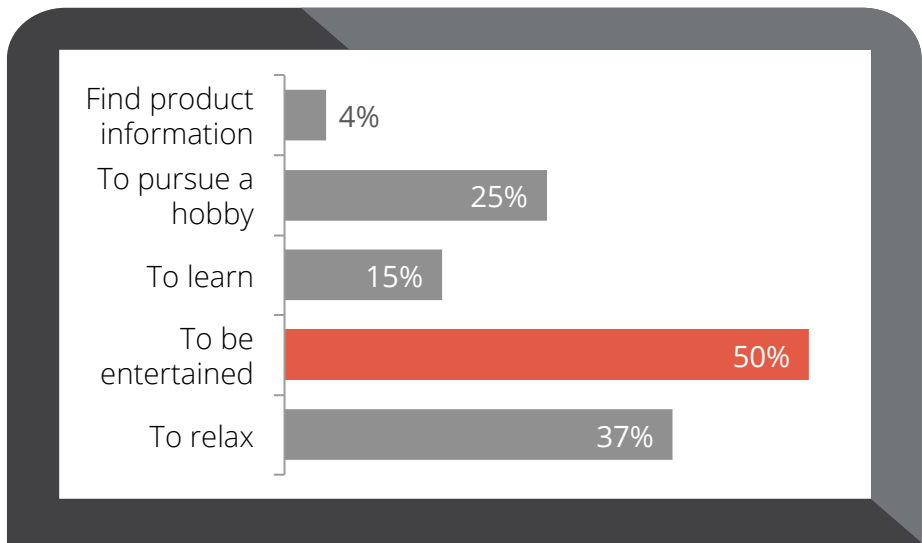
93% 

of the consumers are watching
online video at home

7 out of 10 watch online video alone



Why are we watching online video?



5 out of 10 of the consumers are watching videos because they want to be entertained

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

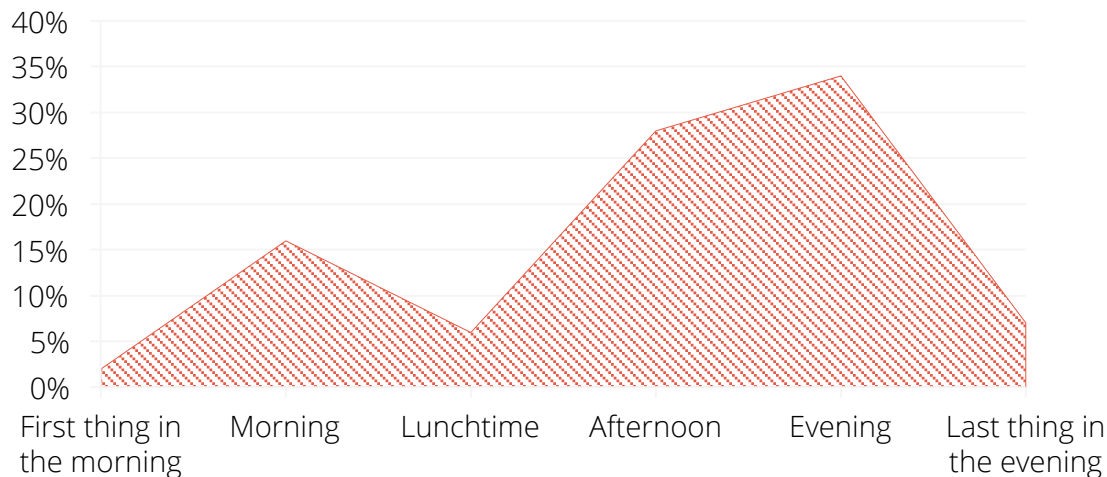
Short videos in the evening

57 % of the consumers watch videos that are 5 minutes or shorter



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?

The Smart Viewer is a Focused Viewer

6 out 10

watch **online video content** unrelated to their surroundings



64%

are focused when watching online video



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
 - 20+ in 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 January and March 2014.

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

- o Sample size was set at a minimum of n=3,000 in each country except some Asian and African countries
- o 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

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

Weighting

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

Timing

- o Consumer Barometer surveys were administered between May and September 2014.

THANK YOU!

CONTACTS: