

A woman with blonde hair, wearing a dark blue sweater, is shown in profile, interacting with a large, vertical digital display. The display is illuminated with a glowing blue network diagram of interconnected nodes and lines. The background is a dark, out-of-focus city street at night, with blurred lights from buildings and street lamps. The overall scene conveys a sense of modern technology and data analysis.

# Consumer Insights

FutureBuy 2018 Update

# Overview of FutureBuy 2018

# FutureBuy 2018 - 2019: Our syndicated cross-category survey...



...covers 18 categories spanning a wide spectrum of retail & services

## FMCG

- Beauty and Personal Care
- Packaged Food & Beverages
- Household Washing and Cleaning Products
- OTC Healthcare
- Baby Care (i.e. diapers, baby cosmetics)
- Shaving (non-electric; i.e. razors, shaving cream)
- Pet food and accessories

## Other

- Financial Services
- Replacement car & truck tires
- Toys
- Apparel

## Consumer Durables

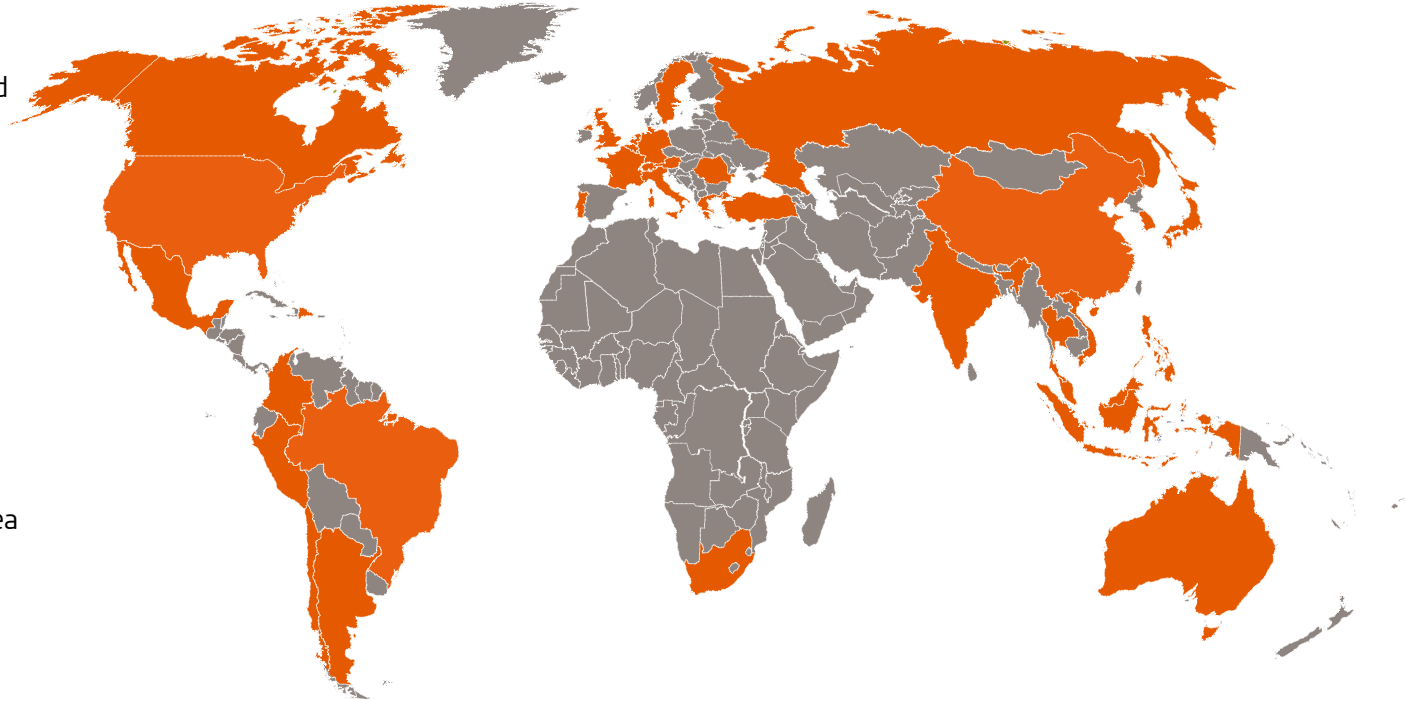
- TV & Video Devices (TV, Camcorder, Action Cameras, 3D cameras, DVD/Blu-ray/4K video players)
- Audio devices (Hi-Fi, Audio Home System, Radios, Loudspeakers, Portable / Connected Audio Devices)
- Wearables (fitness or health trackers, smart watches, smart glasses, virtual reality glasses)
- Computing (desktop, notebook, tablet PC, printers)
- Smartphones / cell phones (smartphones, mobile phones)
- Major Home Appliances (i.e. refrigerators, washers & dryers, ovens, dishwashers)
- Small domestic appliances (i.e. coffee makers, toasters, mixers, blenders, hair dryers/irons, electric shaver/trimming/epilation, etc.)

# FutureBuy 2018: Global scope...



...which now includes 35 key markets

- USA
- Canada
- Mexico
- Brazil
- Chile
- Colombia
- Dominican Republic
- Argentina
- Peru
- UK
- Italy
- Austria
- Belgium
- Netherlands
- France
- Germany
- Russia
- Portugal
- Romania
- Switzerland
- Sweden
- Greece
- Turkey
- China
- Indonesia
- Malaysia
- Philippines
- India
- Japan
- South Korea
- Singapore
- Thailand
- Vietnam
- Australia
- South Africa





# FutureBuy 2018: Topic coverage...



...which illuminates the most vital shopper issues



## Bricks and Clicks

- Rise of omni-channel
- How mobile transforming shopping
- Shopper loyalty
- Role of the store



## Touchpoints

- Sources of information
- Most influential in shopping process
- Online and in-store



## Mobile payments

- Attitudes about benefits of mobile payment
- How utilizing
- Barriers to adoption
- Generational differences



## Special topics

- Showrooming
- Attitudes about privacy/security
- Peek into future with Leading Edge Consumers (LEC)

All of the above topics can be viewed from a category perspective (category or category-buyer), profiled by generation and compared across 35 countries.

## Appendix: detailed topic list



### The where of category shopping & purchase

- Incidence of category shopping
- Where category shopped – on/offline
- Brick & mortar channel preferences per category
- Where device (smart/tablet) used last time



### Shopping channel drivers & barriers

- Online & offline drivers
- Importance of online purchase factors & shopping decision factors
- Barriers to online purchase



### Shopping devices

- Incidence of device use for online shopping
- Device ownership
- Device usage for shopping per category
- Last shopped category using smartphone/tablet
- How device used to shop per category



### Shoppers habits, attitudes & trends

- Shopping attitudes
- Leading Edge Consumers' attitudes
- Product/service recommendation
- Development of shopping behaviors
- What are they doing more or less of
- Online shopping activities
- Device usage (esp. smartphone / tablet) & location
- Showrooming



### Methods of payment & delivery

- Payment methods used in stores
- Incidence of online & in-store mobile payment
- Payment method use & frequency
- Mobile app & platform use
- Delivery method use (now & future)
- Attitudes towards mobile payment

# Data Split by Generations and Leading-Edge Consumers (LEC)

## Group definition

### Generations



GenZ: aged 18-27

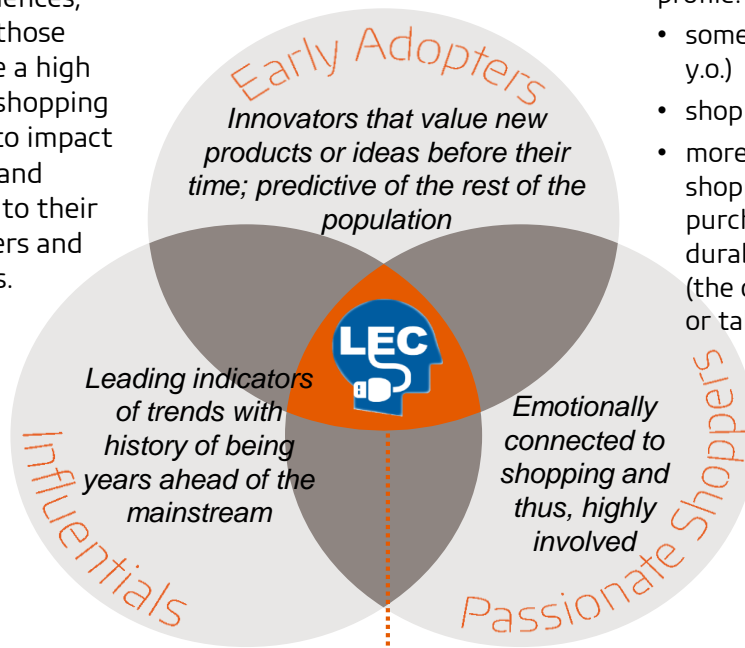
GenY: aged 28-37

GenX: aged 38-52

Boomers: aged 53-71

### Leading-Edge Consumers

When thinking of offering new shopping experiences, you want to look at those consumers who have a high level of interest for shopping and are more likely to impact your attractiveness and conversion rate due to their roles as early adopters and shopping influencers.



Romanian Leading Edge Consumers profile:

- somewhat younger (under 52 y.o.)
- shop for more product categories
- more likely to finalize the shopping process with a purchase, esp. when it comes to durables and to financial services (the others either window-shop or take more time to decide)

**16%**

of sample identified via proprietary questions and analytics

The background image shows a close-up of a person's hand in a dark suit, holding a large, dark grey mechanical gear. The gear is part of a series of interlocking gears that recede into the background. Overlaid on the gears are glowing blue digital wireframe patterns, suggesting a connection between physical machinery and digital technology. A semi-transparent orange horizontal bar is positioned across the middle of the image, containing the text 'Online Reporting' in white.

# Online Reporting

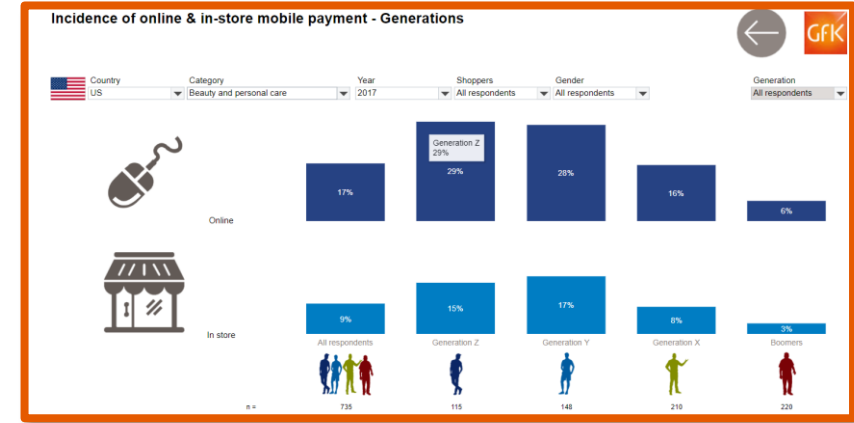


# Online reporting via dashboard (MarketingTracker)



## Seamless client access to:

- Wide range of standard easy-to-use dashboards covering key topics
- 2015, 2016, 2017 & 2018 data for Y-on-Y trending
- Embedded statistics options
- Standard filters:
  - Countries, regions & global
  - Categories OR Category-buyers
  - Generations
  - Gender
  - Leading Edge Consumers
- Easy export of dashboards to PowerPoint
- Embedded pivot tables for additional analyses
- Save within MT or easy export to Excel
- All dashboard filters available in pivot tables



MarketingTracker Explorer

Search: Q12A Device used for payment (C)

Publications: Q1 Any shopping done (C), Q12A Device used for payment (C), Q2B Device used online (C), Q2C Payment method (C), Q3A Statements about shopping (C), Q3B Shopping behaviour (C), Q3C Recommended to (C), Q4 Reasons for choice (C), Q7 Level of activity versus last year (C), Q8 Important shopping factors (C), Q9 Owned device (C), Q11 Average % time spent online sh., Q12 Device used to shop LHM (C), Q13 Activities in LHM, Q14 Engagement in online activity (C), Q15A Device used for help (C), Q15B Last bought using smartphone, Q16C Device used last time (C), Q16 How device was used last time, Q17AB Usage device in LHM (C), Q17C Found in store, bought online, Q18A Used mobile for payment (C)

Report: Q12A Shopping method (C)

2015

World

Gender: All shoppers

Pct: Off

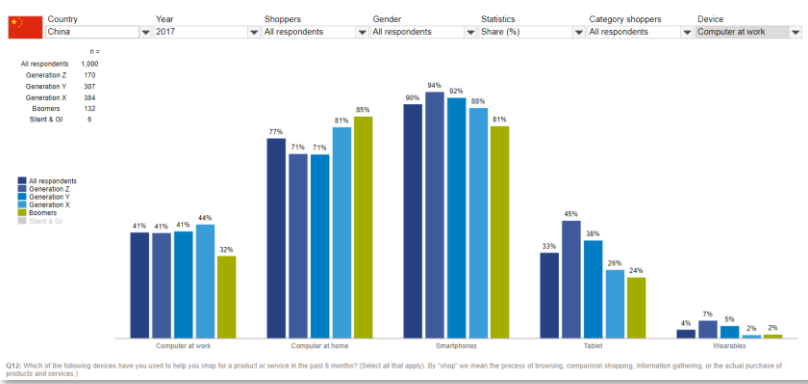
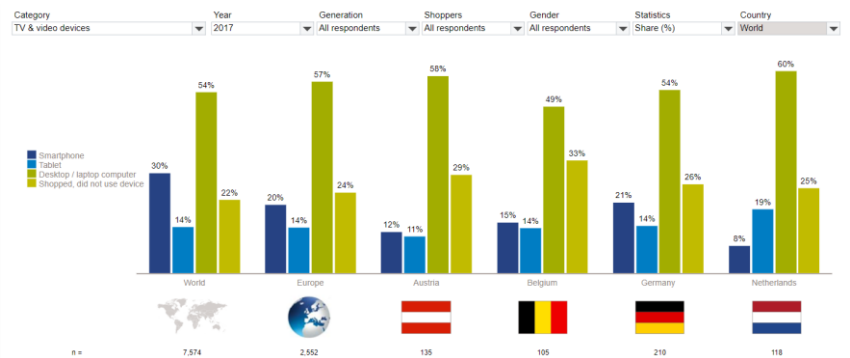
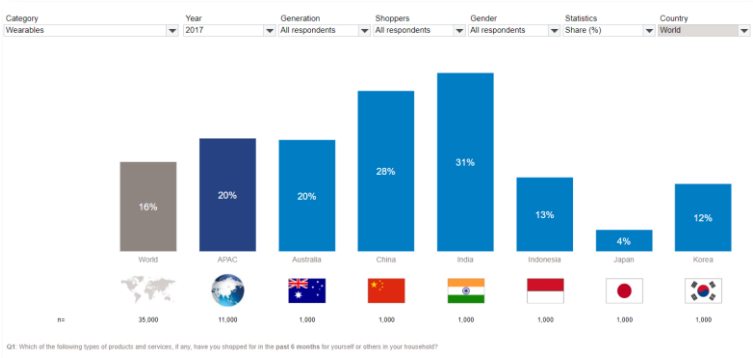
Weighted: All profiles

All respondents

	All respondents	Exclusively Online	Exclusively in a store/location	Both
Consumer Electronics	100 %	25 %	30 %	45 %
Mobile phones	100 %	29 %	37 %	34 %
Home improvement	100 %	6 %	65 %	28 %
Lawn and garden	100 %	6 %	73 %	22 %
Households washing and cleaning products	100 %	3 %	81 %	16 %
Beauty and personal care	100 %	6 %	62 %	32 %
Package food and beverage	100 %	3 %	80 %	17 %
Toys	100 %	12 %	41 %	47 %
Home appliances	100 %	19 %	41 %	40 %

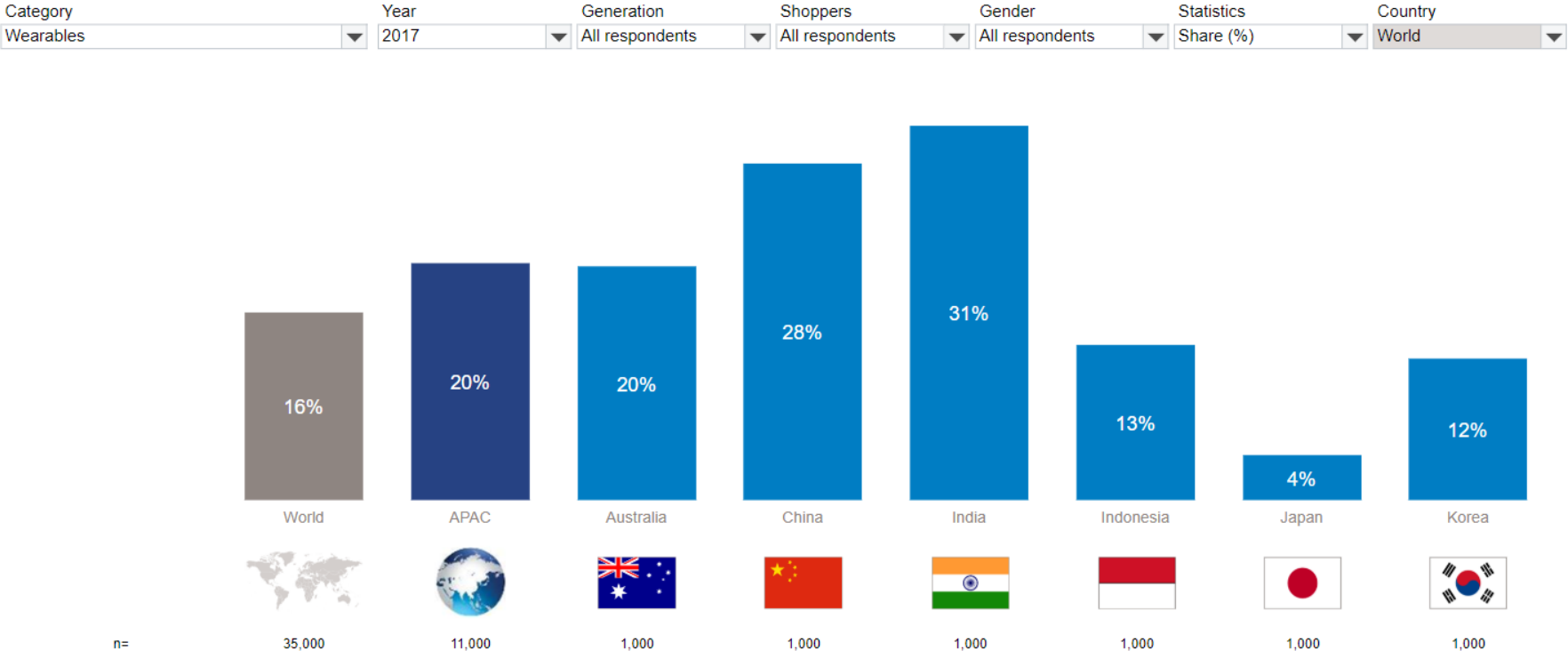
Copyright © 2009-2016 GfK

# Dashboards for Online Reporting - Examples



# Category-specific results for multiple markets

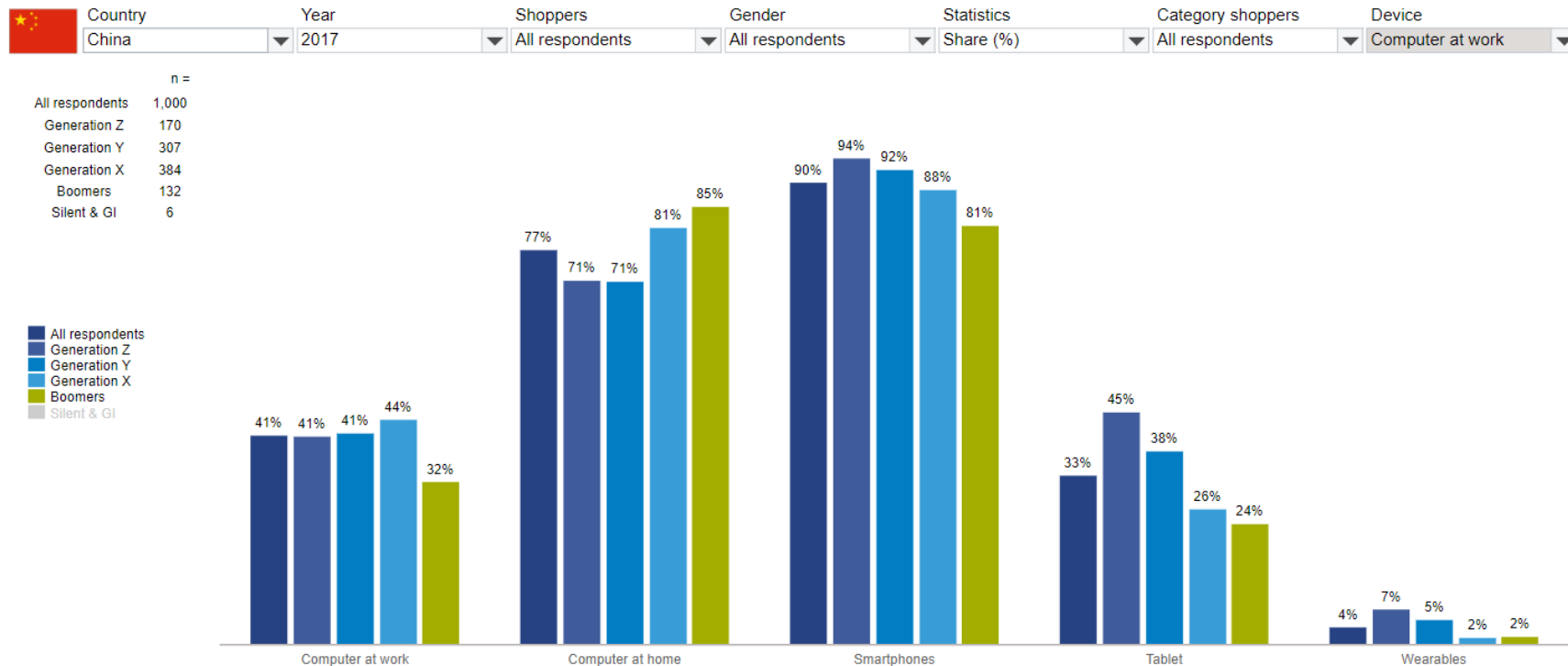
## Incidence of category shopping



Q1: Which of the following types of products and services, if any, have you shopped for in the past 6 months for yourself or others in your household?

# Generational view of results for a single markets

## Device use for shopping - Generations

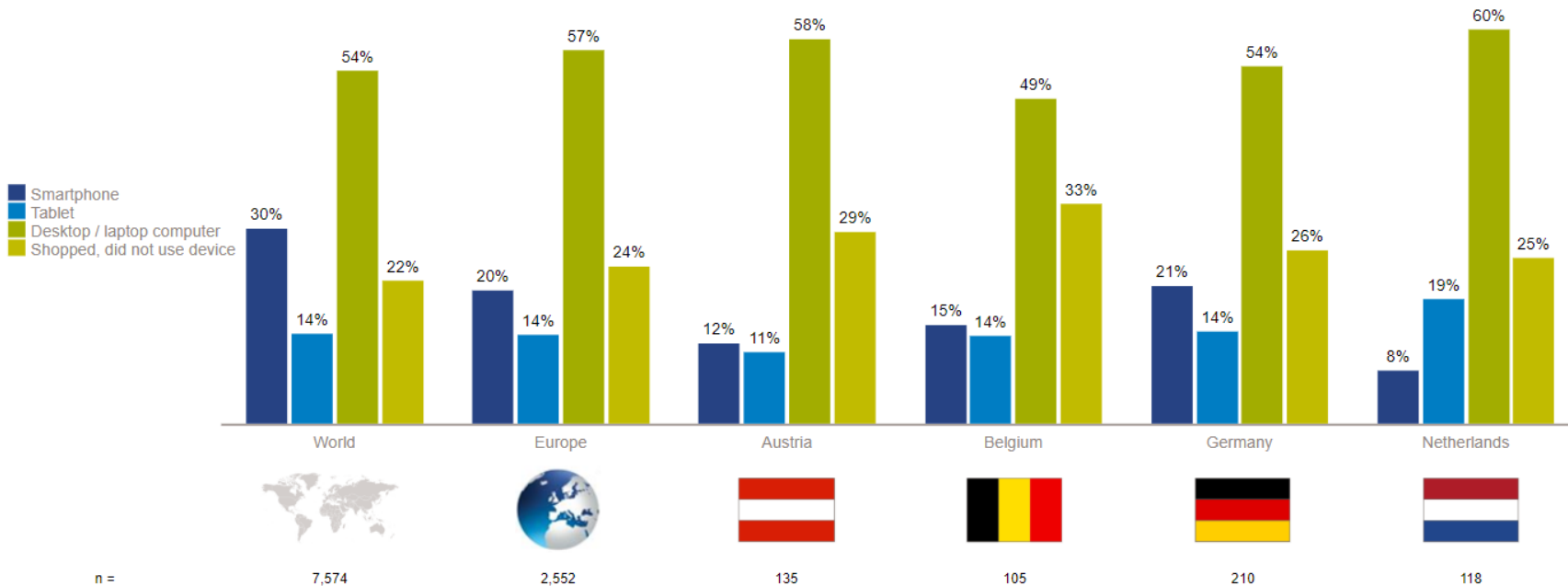


Q12: Which of the following devices have you used to help you shop for a product or service in the past 6 months? (Select all that apply). By "shop" we mean the process of browsing, comparison shopping, information gathering, or the actual purchase of products and services.)

# Category view of YoY growth for a multiple markets

## Device use for shopping per category

Category: TV & video devices Year: 2017 Generation: All respondents Shoppers: All respondents Gender: All respondents Statistics: Share (%) Country: World





# Generational view of category results for a single market

## Incidence of online & in-store mobile payment - Generations



Q18A: In the past 6 months, have you used your mobile device (including smartphones, tablets and wearable devices) to pay for any of the products or services below? (Select all that apply)

# Options & Pricing

# Reporting and data access options



## Online Reporting Portal



- Live interface access to all categories for 1 year
- Includes 2015, 2016, 2017 and 2018 FB data (2017 – 2018 for Romania)
- Up to 5 users per client
- Global, regional and country access packages available
- Training session on portal navigation

## Custom Presentations



Custom category and/or market-specific insights presentations

Priced individually based upon their scope

# FutureBuy 2018: Online portal access pricing

## Global & Regional Access Pricing

### Country Access

1 year portal access to <b>Romania</b>	€ 4 980
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### Global Access

1 year portal access to <b>all 35 countries</b>	€ 39 960
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### Regional Access

1 year portal access to: <b>Europe (including Turkey and Russia) (15 markets)</b>	€ 26 840
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### Additional User Access

Additional users above the <b>5 included</b> in the prices of all access packages	€ 1 000 per user
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A man and a woman are standing in a store, both wearing VR headsets and holding controllers. They are smiling and appear to be enjoying the experience. The man is wearing a maroon sweater and blue jeans, while the woman is wearing a light green jacket and blue jeans. They are standing in front of a display of large flat-screen TVs. The background shows more TVs and store shelving.

Thank you.

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