GfK FutureBuy® 2015

Select US Market Findings Highlights

Jan 2016

GfK FutureBuy® 2015 overview

25 Countries…

Austria	India	Russia
Australia	Italy	Spain
Belgium	Japan	Sweden
Brazil	Korea	Switzerland
Canada	KSA (Saudi Arabia)	Turkey
China	Mexico	UK
Denmark	Netherlands	US
France	Norway	
Germany	Poland	

17 Categories…

FMCG
- Beauty and Personal Care
- Packaged Food/Bev
- Household Washing and Cleaning products
- OTC Healthcare

Consumer Durables
- Consumer Electronics
- Mobile Phones
- Home Appliances
- Furniture & Furnishings

Services
- Financial Services
- Healthcare Services
- Food & Beverage out of Home
- Travel, Hospitality, Leisure, & Entertainment

Other
- Automotive
- Toys
- Clothing/Fashion
- Home Improvement
- Lawn and Garden

20 minute

Online Survey

N = 1000 per country (18+)

25,000 shoppers!

Source: GfK FutureBuy® 2015

GfK FutureBuy® shopper survey topics

Bricks and Clicks

- Drivers of channel choice
- How utilizing mobile devices
- Shopper loyalty

Touchpoints

- Sources of info
- Most influential in shopping process
- Online and in-store elements

Special Topics

- Showrooming
- Privacy/security
- Generational differences
- Leading edge consumers (LEC)

Mobile Payments

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

Source: GfK FutureBuy® 2015

GfK FutureBuy® 2015 overview

Survey spans a broad range of key shopper topics

Bricks and Clicks

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- Shopper loyalty

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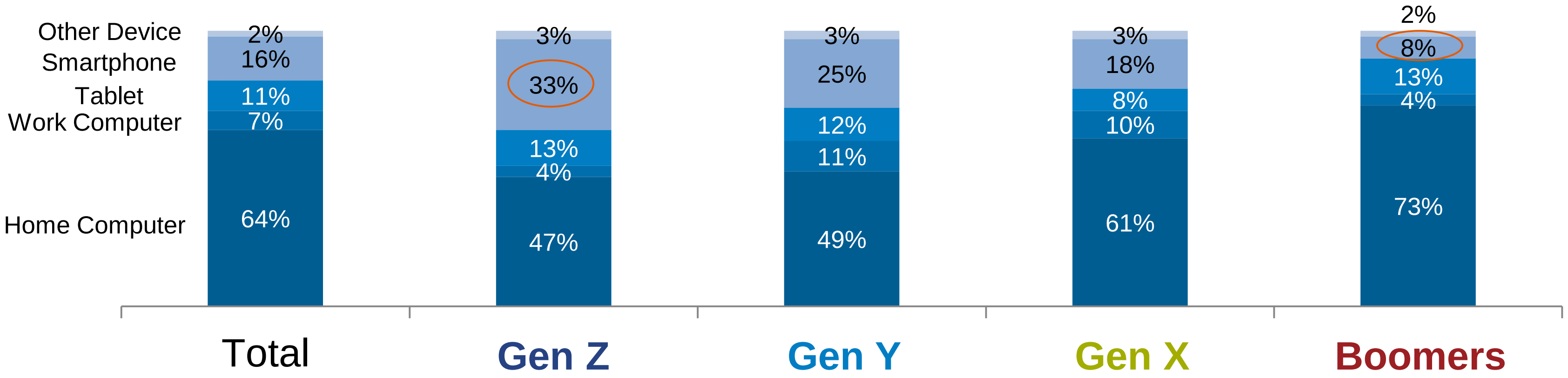
Source: GfK FutureBuy® 2015

Selected Findings

Use of mobile phone for shopping tracks directly with age

- Gen Z shoppers are doing at four times the levels of Boomers
- Women also more likely overall to use mobile devices vs men (32% share of shopping vs 22% for men)

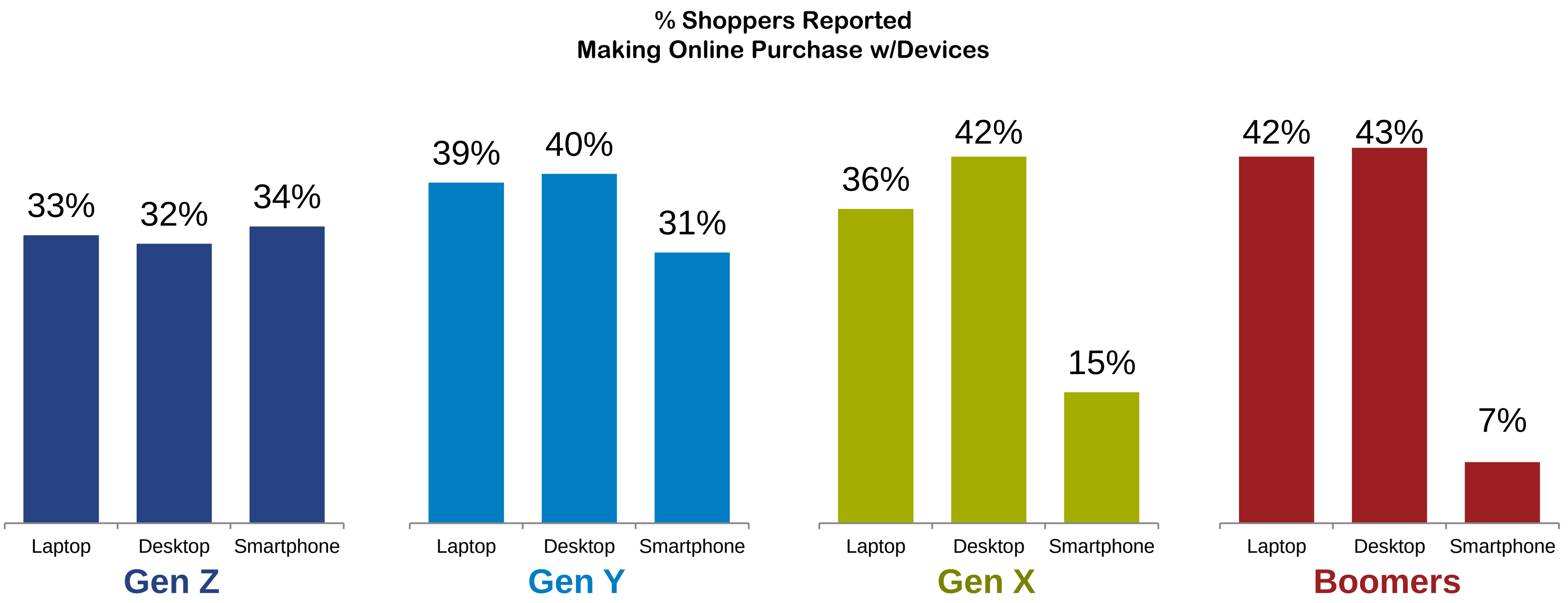
Share of All Online Shopping Activity by Device (US) – Online Shoppers



Q3A: Below are different statements about shopping. Please indicate how much you agree or disagree with each as it relates to your shopping experience in general across the many different products and services you shop for. (Base = shoppers who reported some online shopping activity)
Source: GfK FutureBuy® 2015

Youngest generations most likely to make online purchases on mobile devices

Older generations strongly prefer to buy on desktop/laptop computers



Q2B: For each of your online purchases below, which devices did you use to make that purchase? (Base= those who reported making an online purchase in at least one of the categories shopped)
Source: GfK FutureBuy® 2015

Previous experience and in-store environment rise to top of touchpoint influence hierarchy

Top touchpoints are consistent across most categories.

"Dominant"

Previous Experience w/

- Retailer
- Brand

"Vital"

- Shelf info
- Coupons
- In store displays
- WOM-friends and family

"Influential"

- Store circulars
- Gen. shop sites
- Product samples/demos
- Consumer opinion sites
- Packaging
- Retailer sites
- Brand sites
- Price sites
- TV/Print
- Brochures

"Incidental"

- Online advertising
- Online expert reviews
- Ability to pay with mobile
- Social media
- Shopping apps
- Retailer apps
- Manufacturer apps

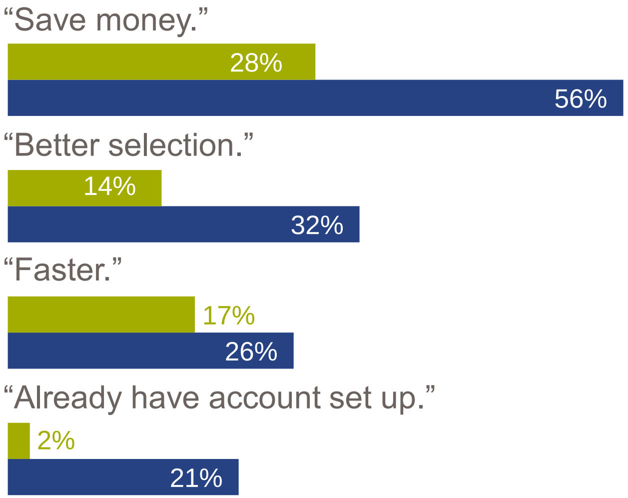
Q8: When shopping for [category], how important was each of the following factors in your shopping decisions?
Source: GfK FutureBuy® 2015

Drivers of channel choice reveal divergent strengths for each format

Brick and mortar now seen as “easier” vs online

Advantage-Brick & Mortar

Advantage-Online



Q4A/B: Thinking about the last time you were deciding whether to purchase something online vs in a store and decided to purchase [online/in store] what factors were most important in driving your choice to purchase there? (select up to 5 items)

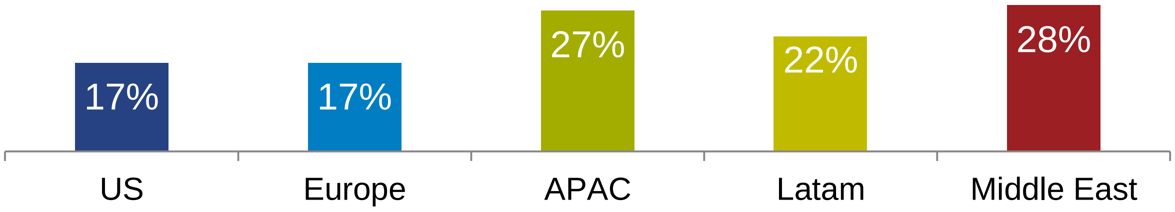
Source: GfK FutureBuy® 2015

Brick & Mortar   Online

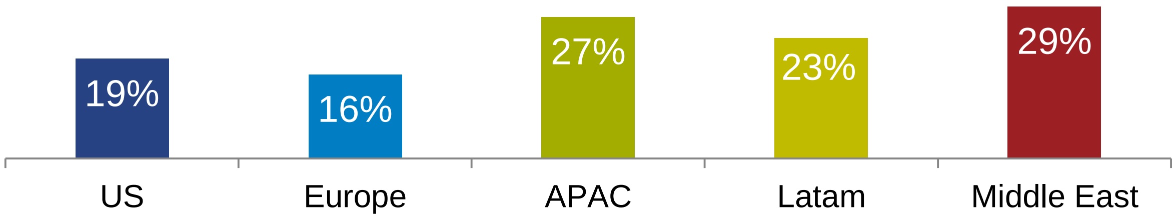
US showrooming levels at low end globally and consistent with European levels

2015 Reported Levels of Showrooming

“Saw product in store then purchased on phone elsewhere.”



“Saw product in store then purchased on tablet elsewhere.”



Q17A/B: During any of your shopping occasions over the past 6 months have you used your [device] for any of the following? (select all) (Base – Shoppers who reported using subject device to help turn shop for product or service)

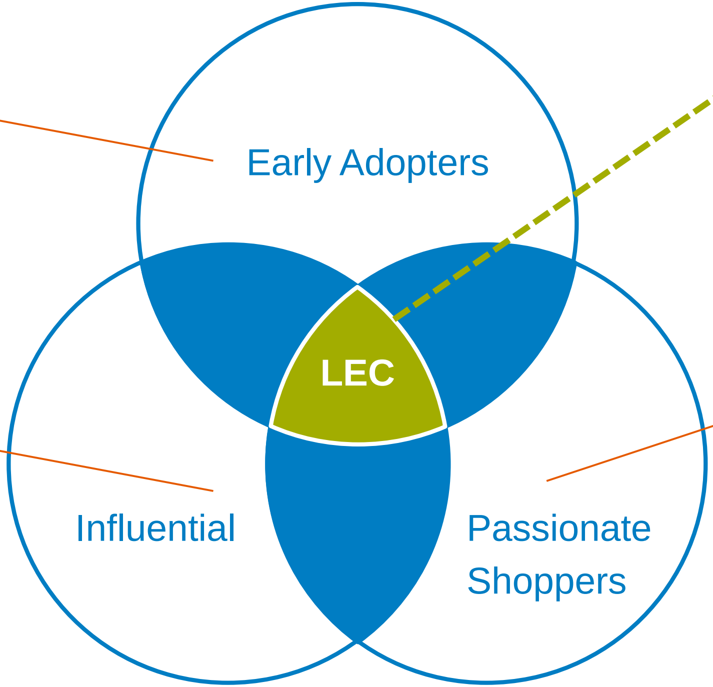
Source: GfK FutureBuy® 2015

Leading Edge Consumers (LEC) – illuminating the new shopping horizons

LECs have potential to signal coming shopper trends

Innovators that value new products or ideas before their time; predictive of the rest of the population

Leading indicators of trends with history of being years ahead of the mainstream



15% of sample identified via proprietary questions and analytics

Emotionally connected to shopping and thus, highly involved

Source: GfK FutureBuy® 2015

Relevance of brick and mortar retail will continue to be challenged by the LEC mindset

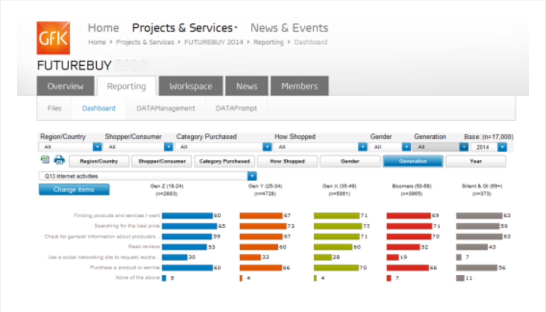
		LEC		Non-LEC
LEC	**Traditional stores much less important** to my shopping than few years ago	69%		35%
LEC	I can shop for **nearly 100% of things I need online**	78%		35%
LEC	I can see future were traditional **retail stores are not a big factor** in my shopping	73%		30%

Q3A: Below are different statements about shopping. Please indicate how much you agree or disagree with each as it relates to your shopping experience in general across the many different products and services you shop for.
Source: GfK FutureBuy® 2015

Pricing

Custom options available to fit your needs

Insights portal access



Live interface access to all FutureBuy® survey data spanning 25 countries and 17 categories

1 year full portal access to all countries/categories for 2015, includes: ▪ Webinar training session on portal navigation ▪ Up to 10 users at single client site	$20,000

Custom presentations

Fully prepared, custom category and/or market-specific insights presentations

Customized findings report on 1 category in 1 market (assumes 30-35 page report)	$10,000
Additional presentations in same category with different market	$5,000 per market

Source: GfK FutureBuy® 2015

Thank you!

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