



Retail Ireland Summit 2016

The Omnichannel Challenge

A consumer perspective

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Behaviour & Attitudes



A woman with long dark hair, wearing a light orange long-sleeved top and black leggings, is standing in a brightly lit retail clothing store. She is holding up a purple and blue patterned garment to inspect it. In the background, there are various clothing racks, a mannequin wearing a blue and purple outfit, and a display of shoes. The store has a modern, clean aesthetic with bright overhead lighting.

Survey to explore underpinnings & drivers of Omnichannel retailing

Fielded online 25th – 30th September 2016

Nationally representative sample of 1,004 adults aged 16+

Scope

How we like to shop?

Extent of online drift

Role and importance of technology

Influence of social media

Online relationship with brands and retailers

Categories drifting online

Cyber Monday & Black Friday: size and impact

Online share last Christmas & predictions for 2016

Does this change what we want?

**How do
we like
to shop?**

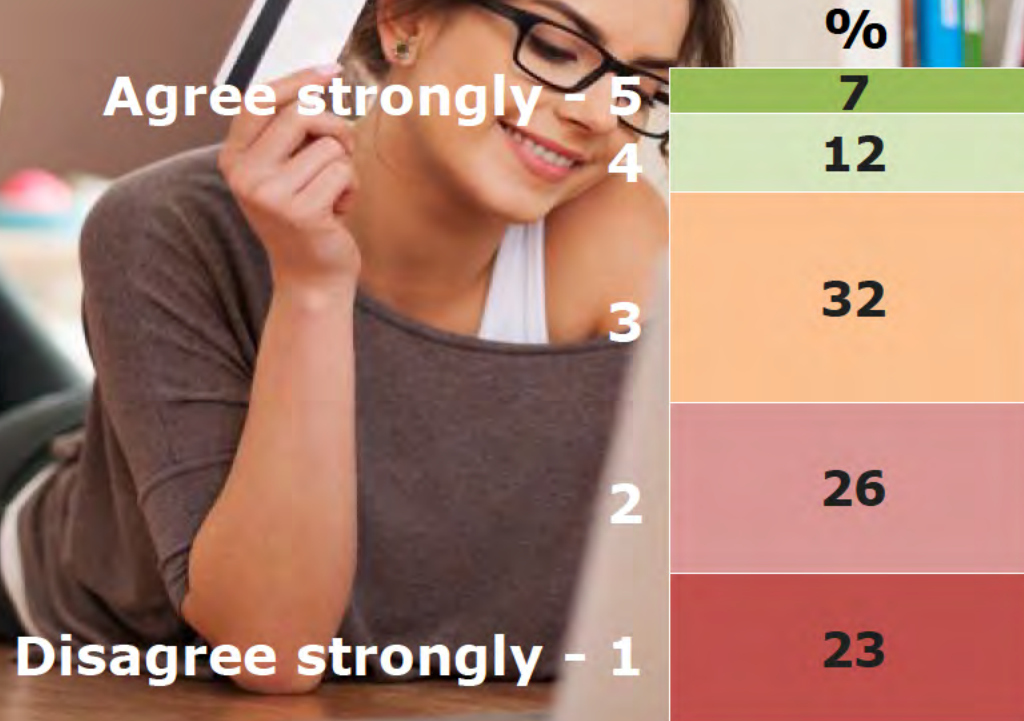


When it comes to shopping I would much rather visit a bricks and mortar store

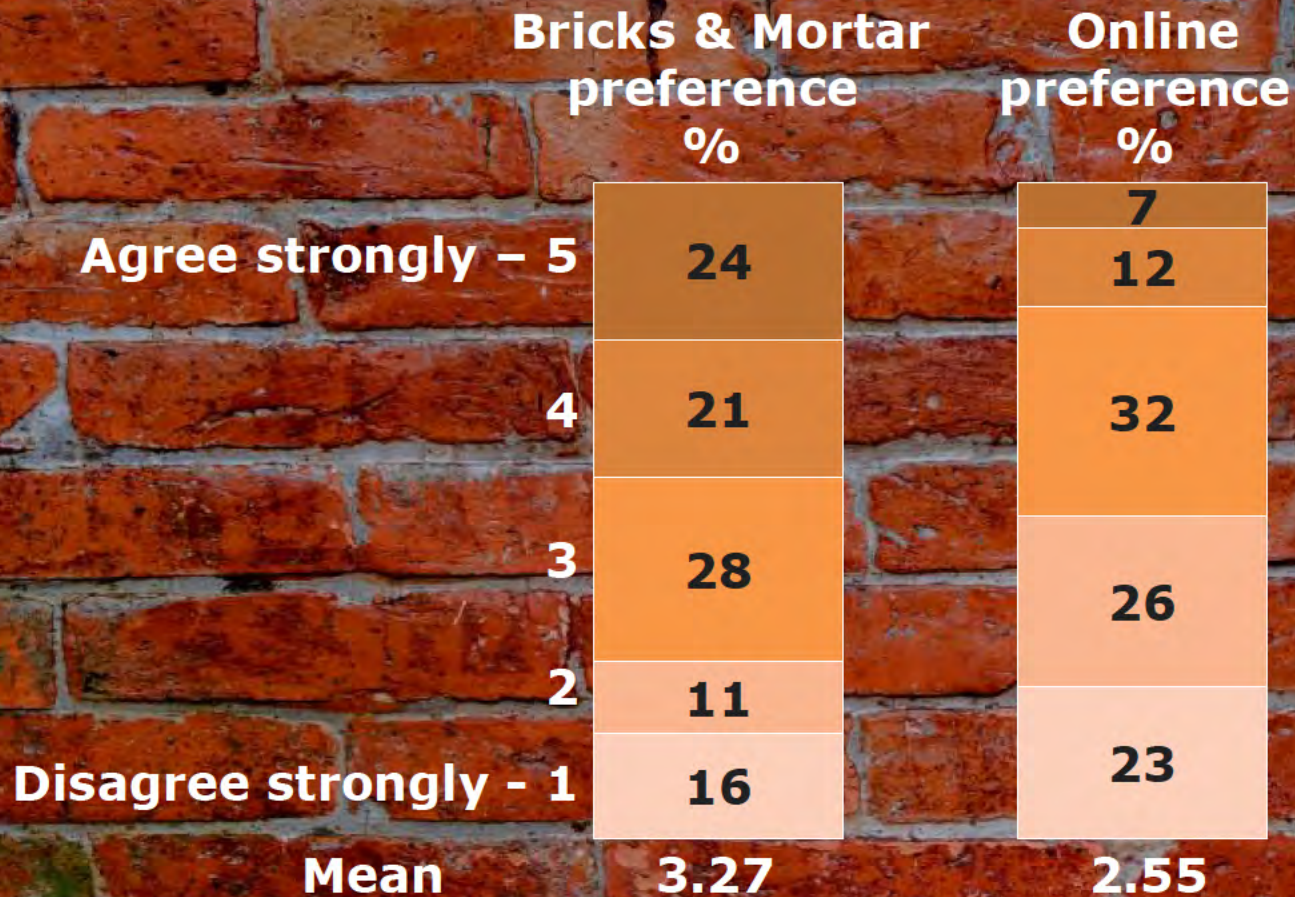
	%
Agree strongly – 5	24
4	21
3	28
2	11
Disagree strongly - 1	16



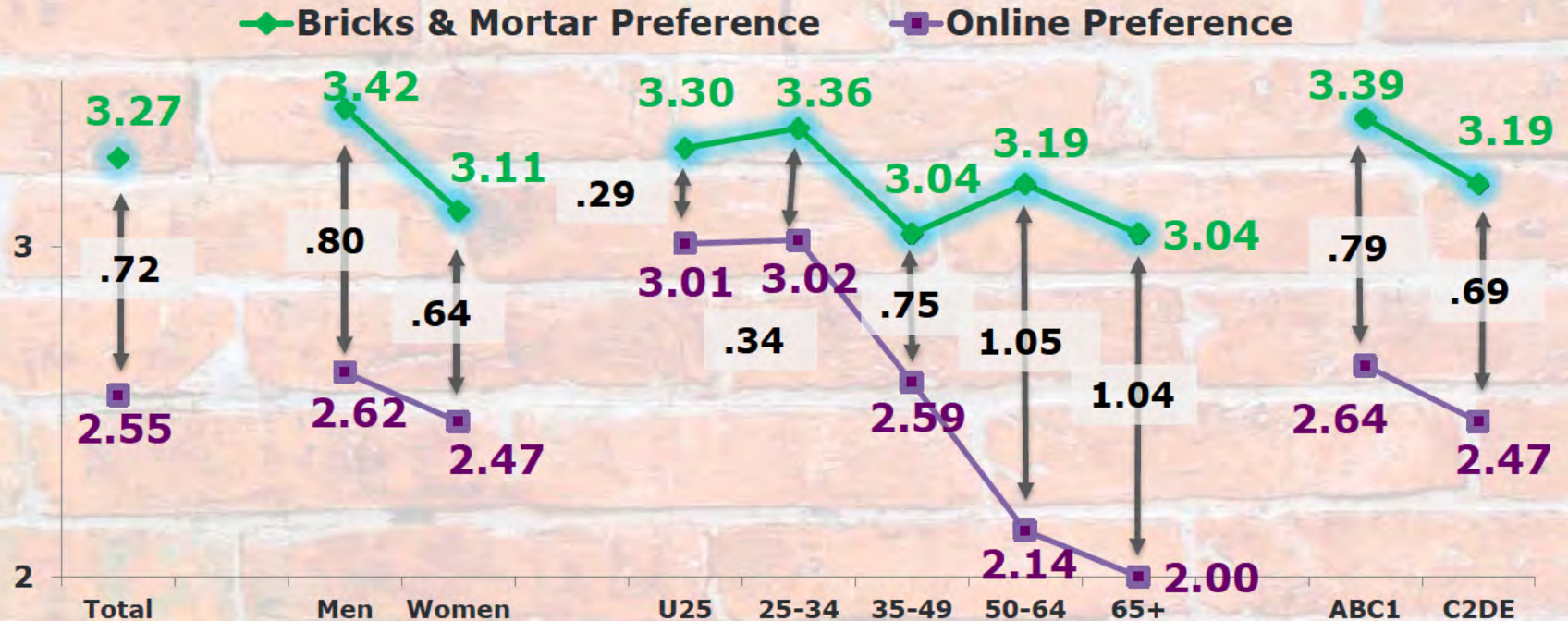
When it comes to shopping I am much keener to do it online



Bricks and mortar wins



But the margin under 35 is very tight



There is substantial overlap between these groups

Bricks &
Mortar
Preference



13% of these
often shop online

Online
Preference

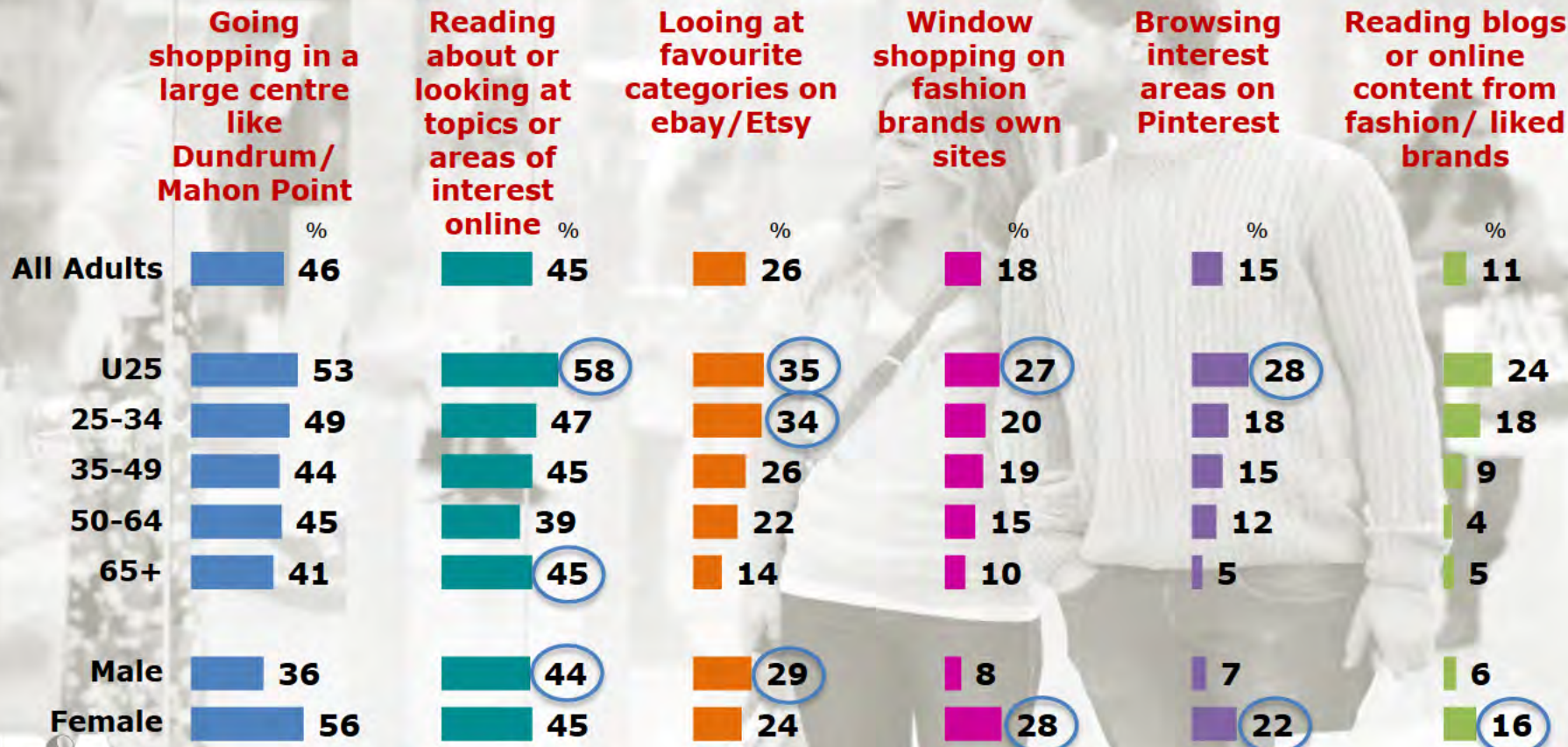


29% of these
often shop in
bricks and mortar
stores too

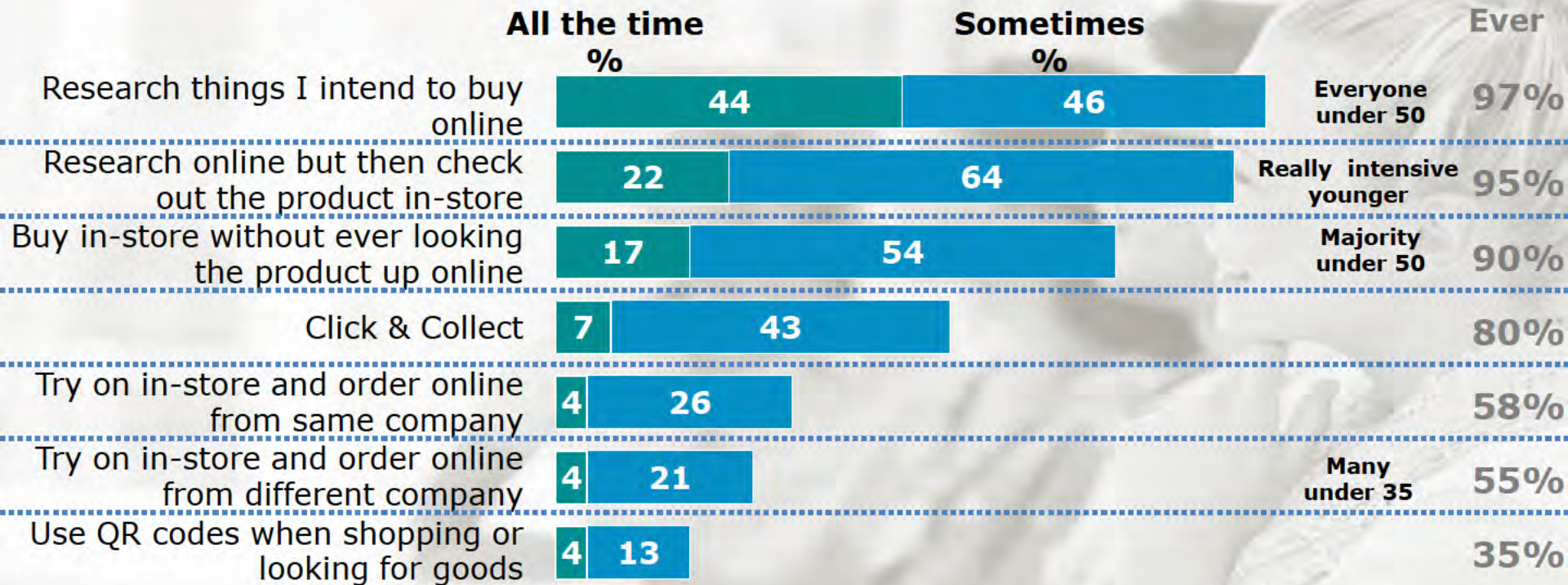
**Is online as engaging
for shoppers?**



What really excites/engages you?



Digital impact on shopping

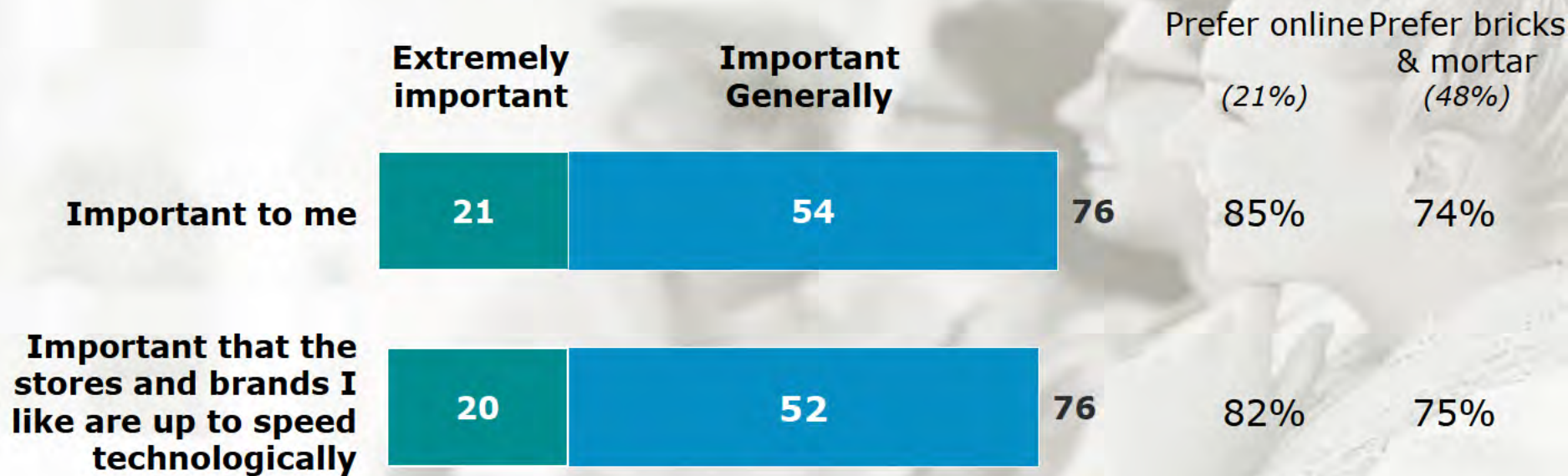




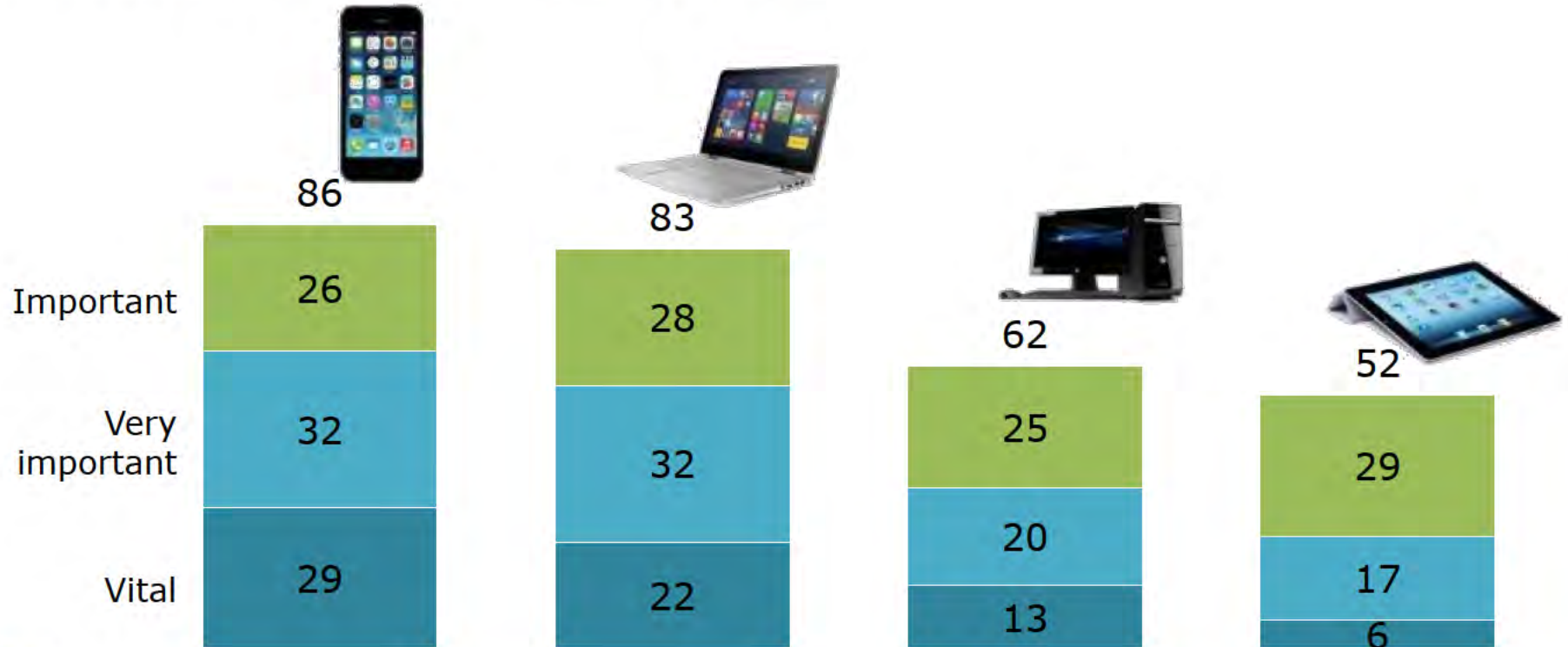
How important is technology?



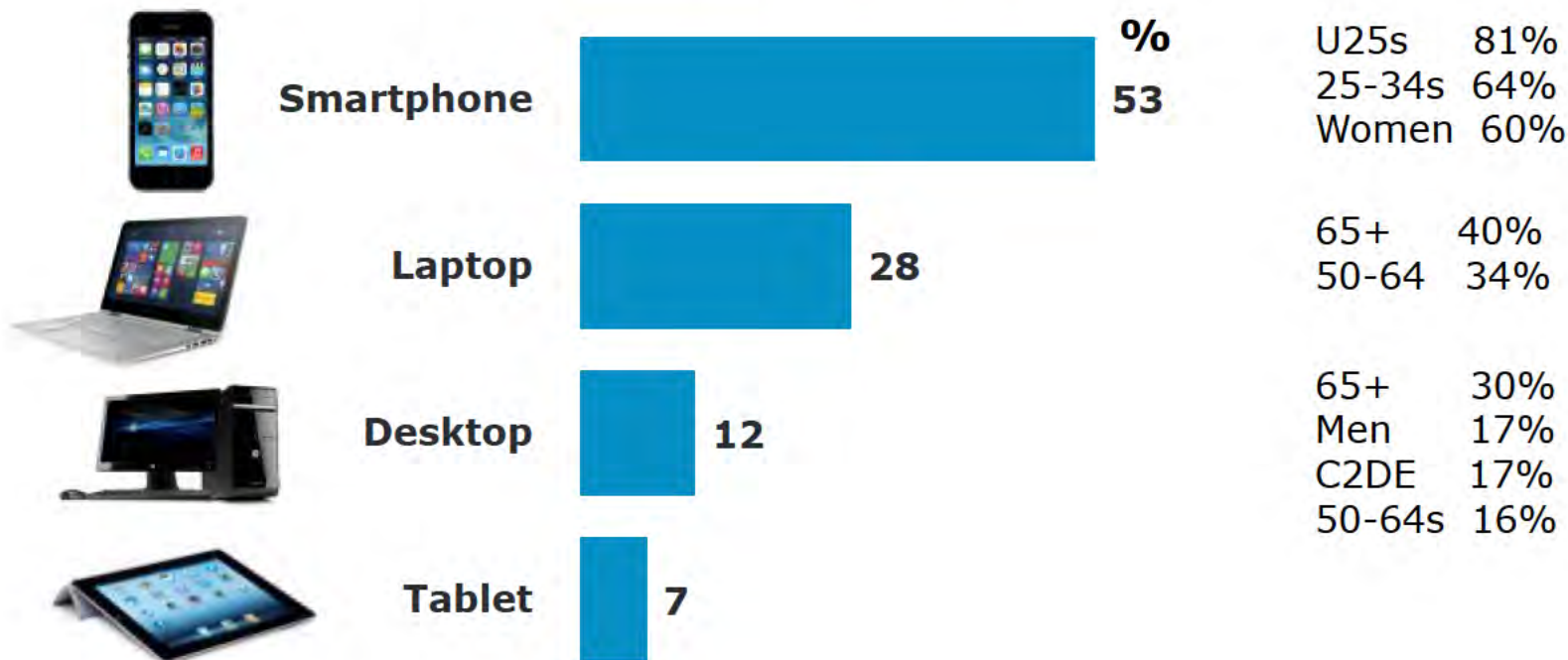
Importance of staying up-to-date with technology



How important are different technologies to you?



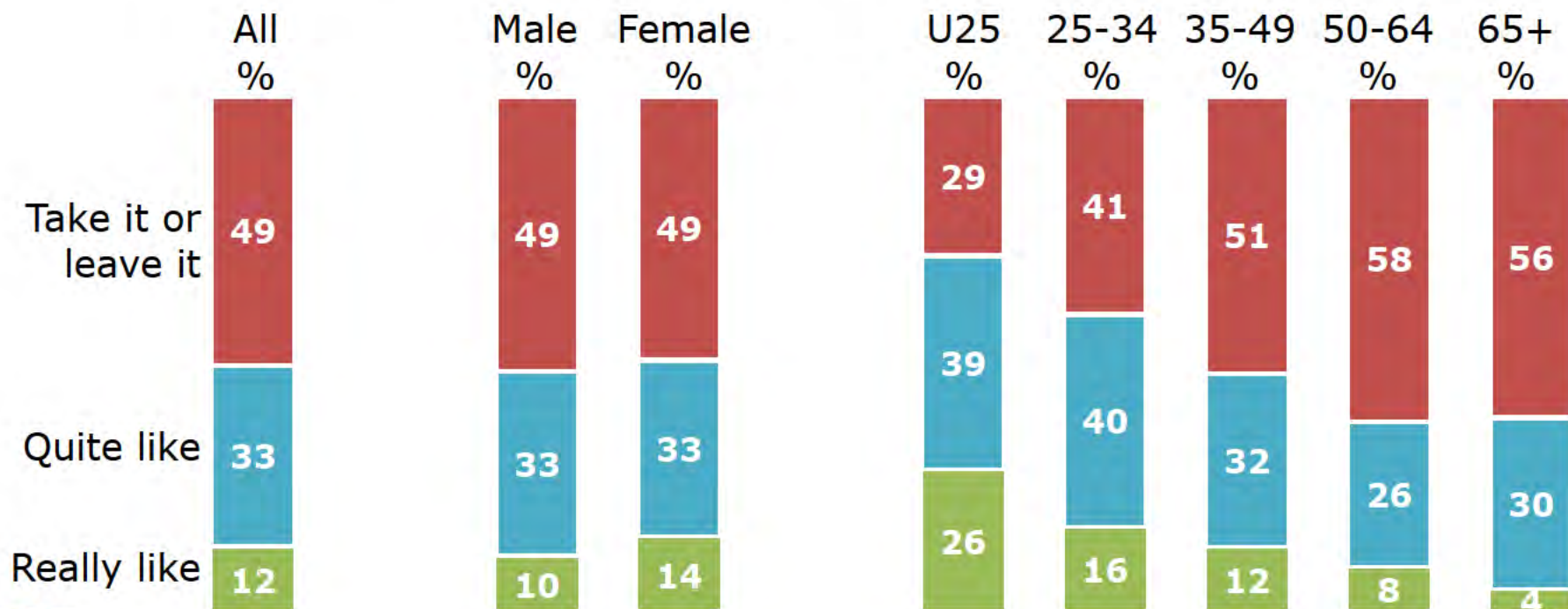
If you could only keep one.....



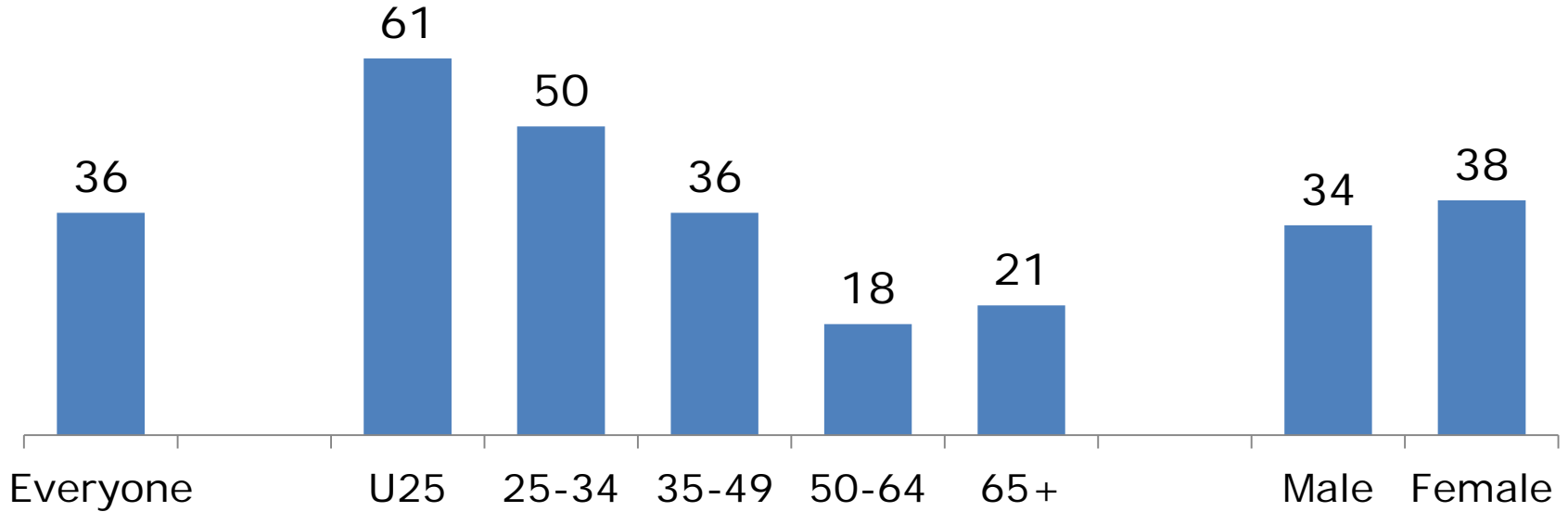


Role of social media & loyalty schemes

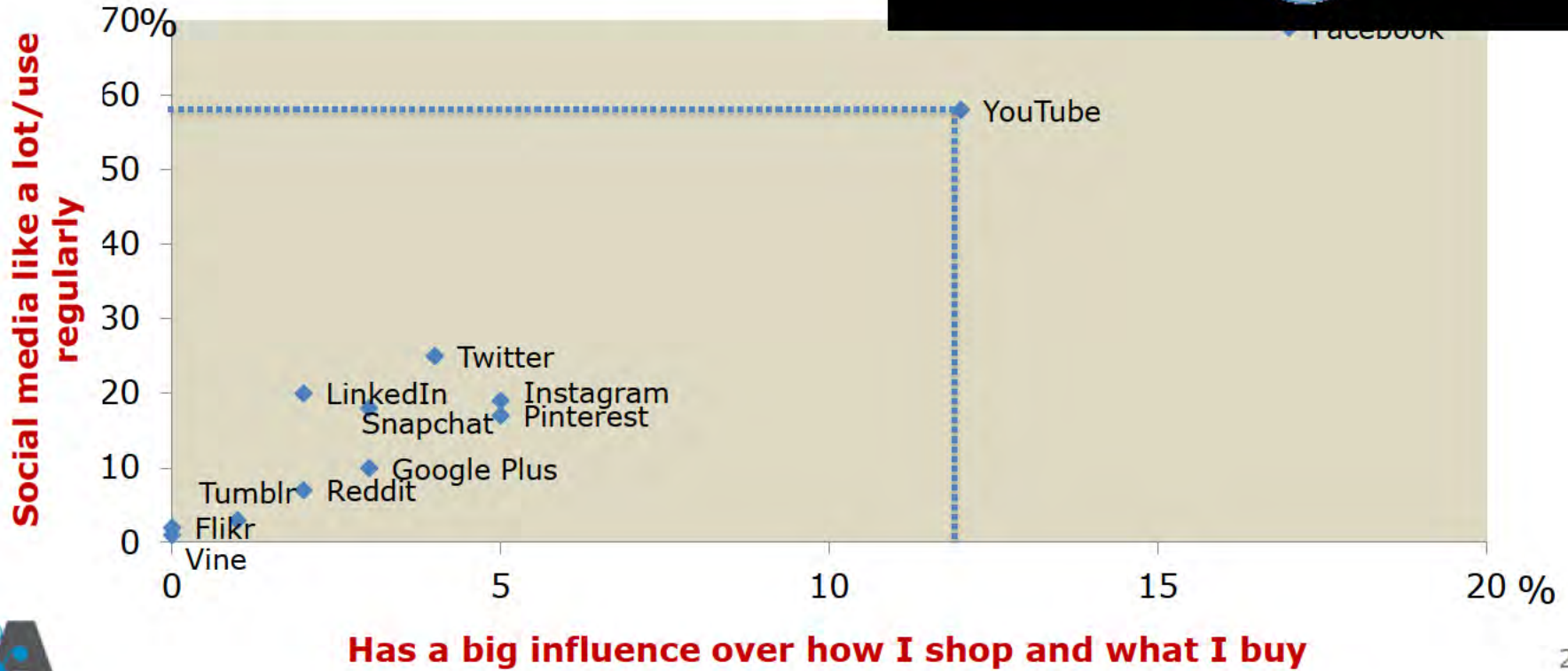
Like to have ongoing relationship with brands or stores online, reading newsletters, browsing their site, looking at tips & blogs



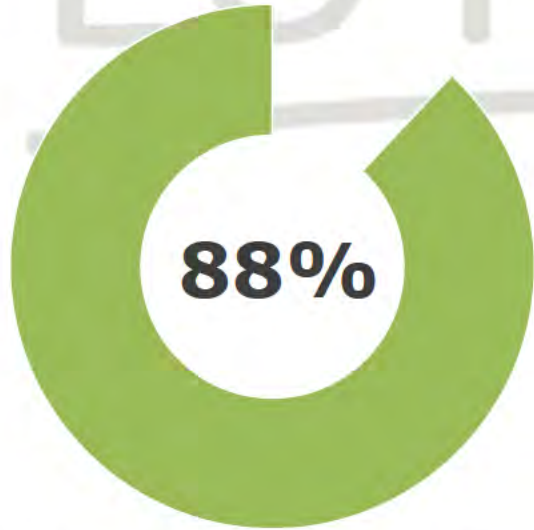
Social media has an influence over how I shop and what I buy



Which social media influence how we shop

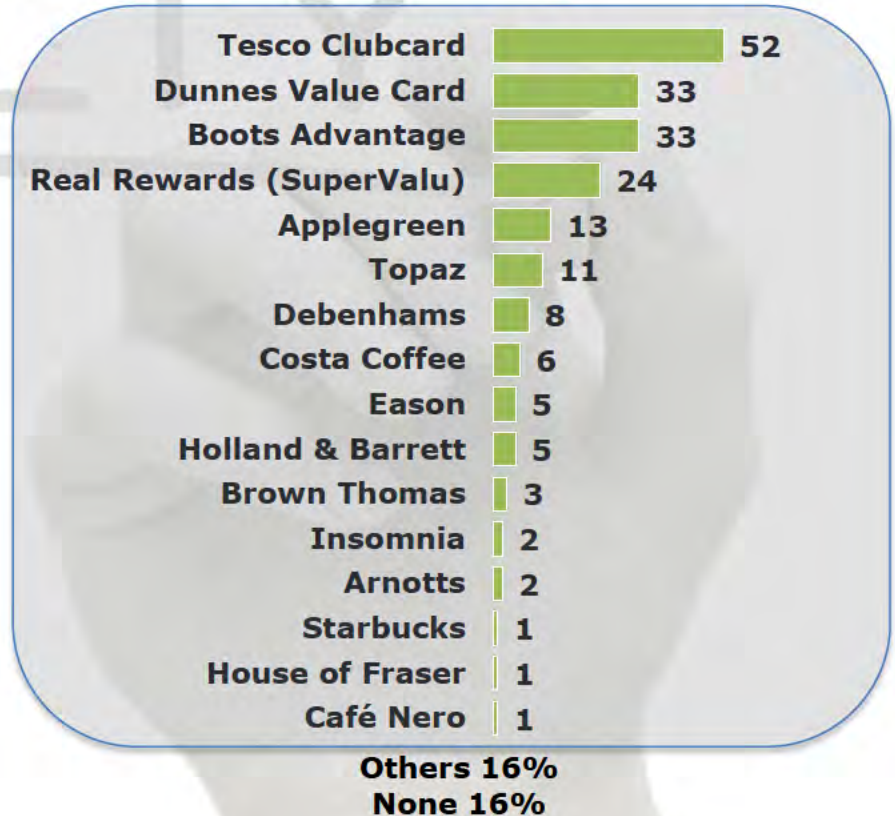


Participate in loyalty schemes



3.9 the average number of schemes 'consciously & deliberately participate in'.

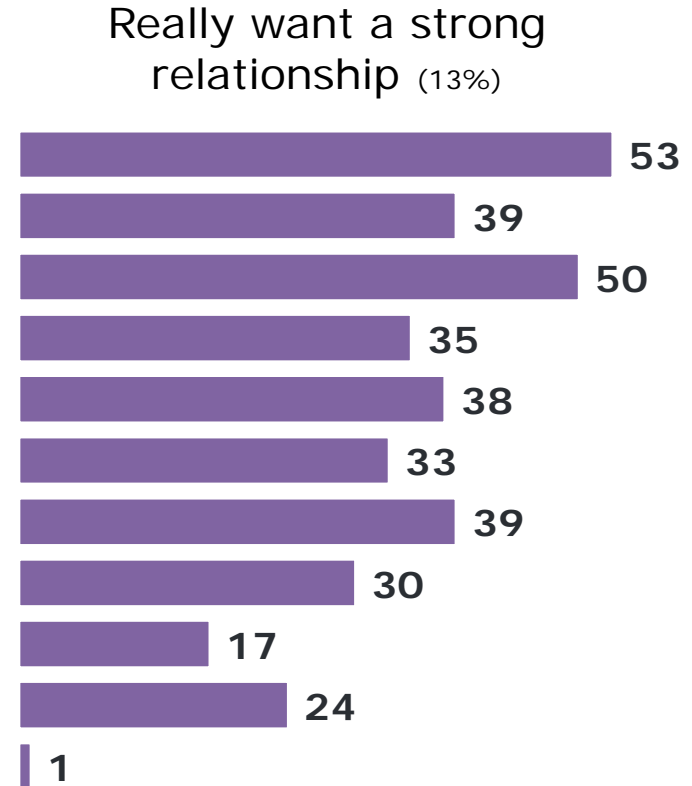
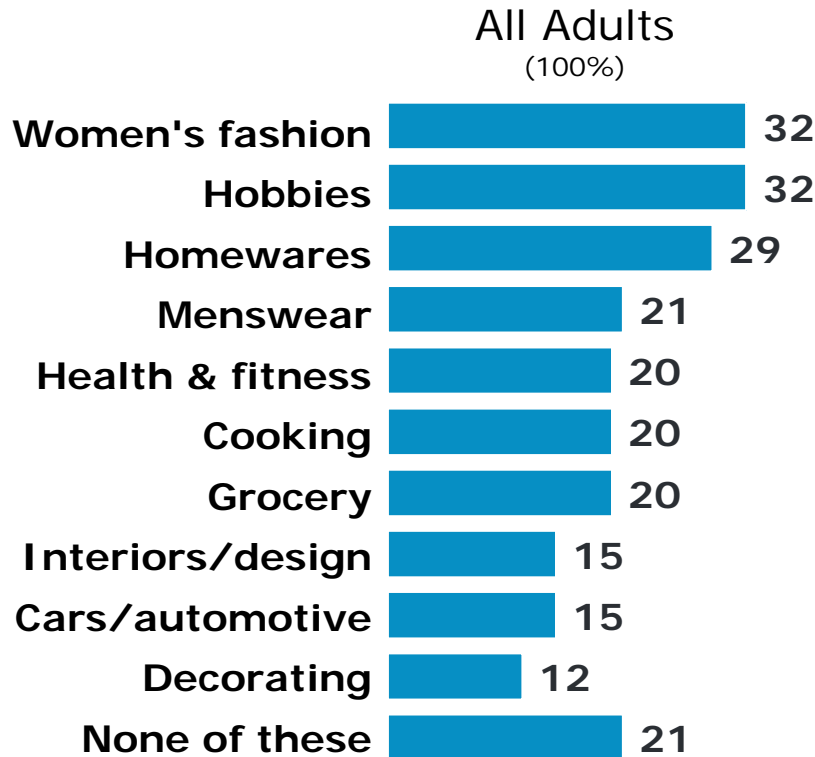
Loyalty schemes that deliberately cause me to shop differently



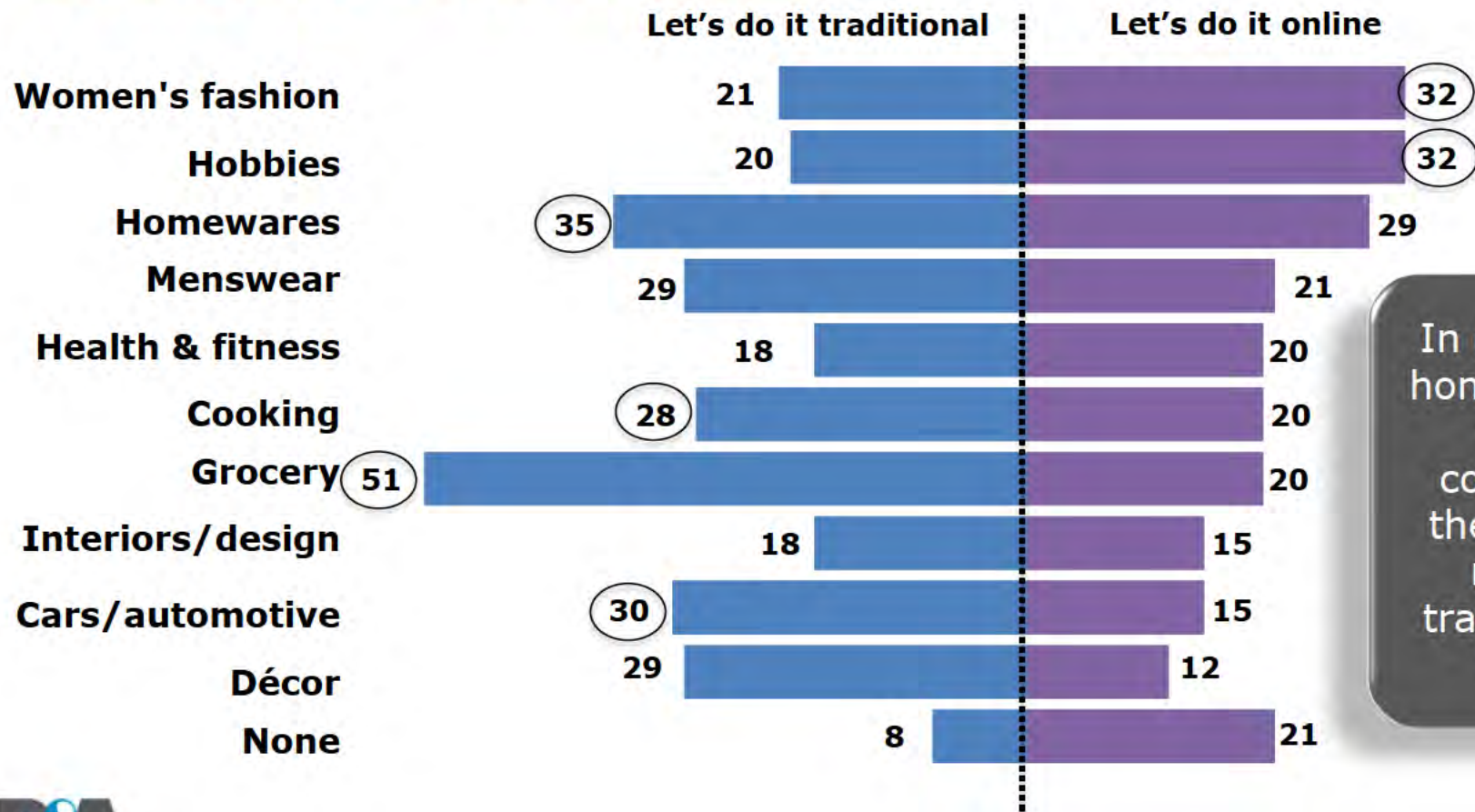


**Does our
behaviour
differ by
category?**

Categories where I want an ongoing online brand relationship

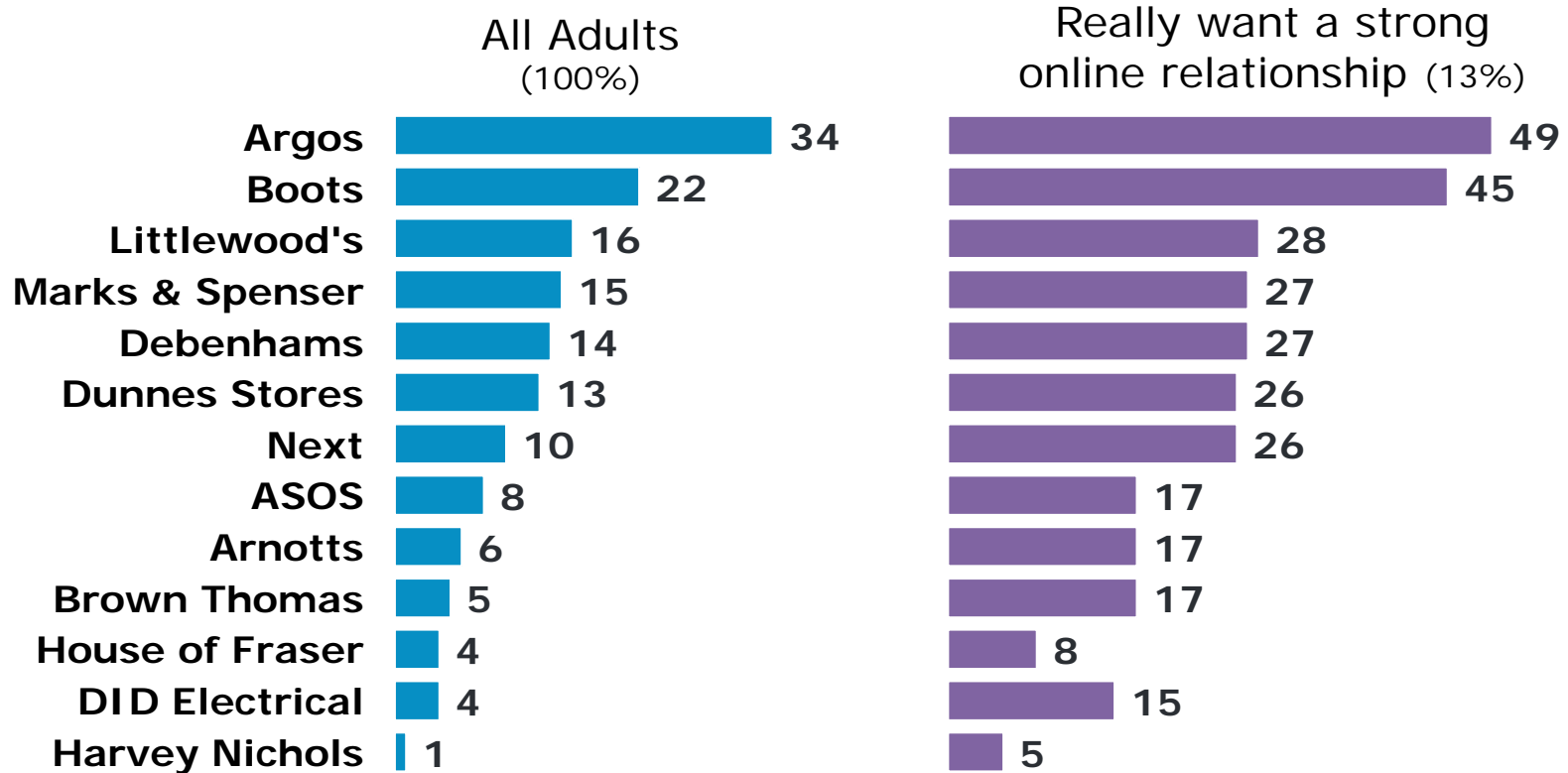


Category differences

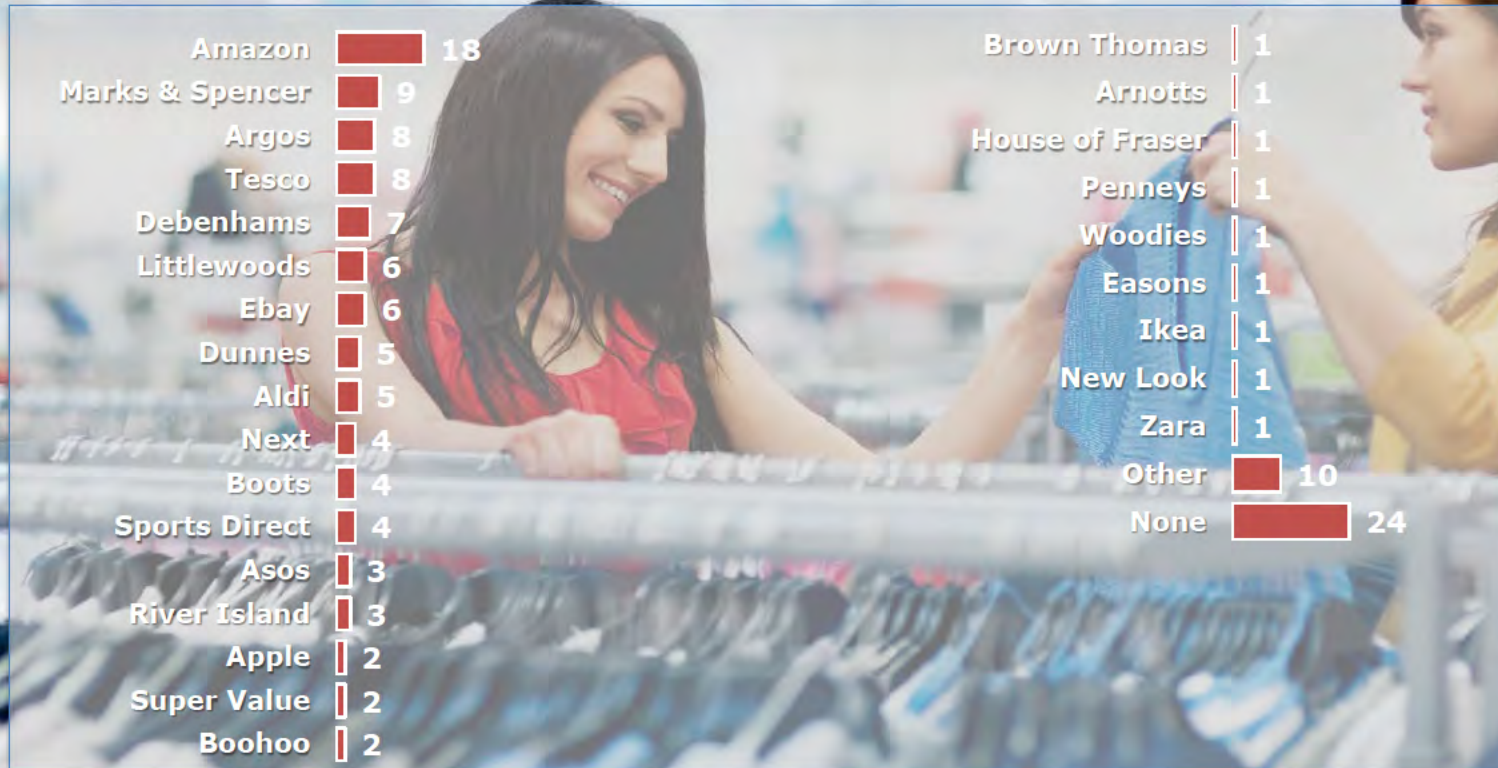


In grocery homewares and cooking, there is a more traditional bias

Retailers with which I have a good & active online relationship



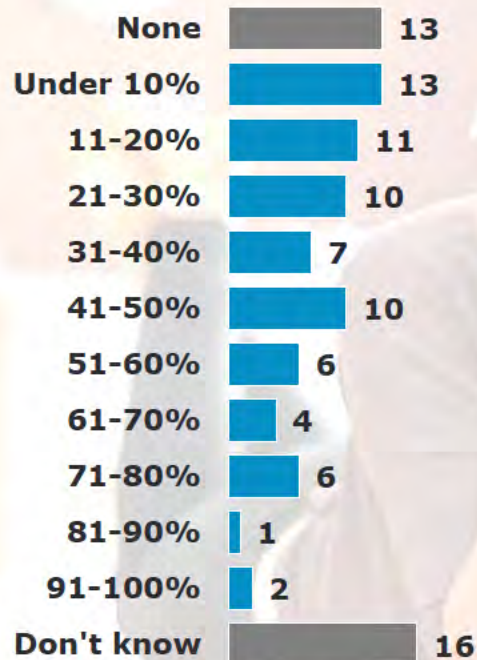
Brand & store online relationships 'particularly value'



**Online at
Christmas**



Online at Christmas



2015 Online
Average
33%

Rate of
Growth
+21%

2016 Prediction

2016 Online
Average
Prediction
40%



Participation in big sales events



Black Friday 2015
(in-store only)

All 20

U25 28

25-34 28

35-49 20

50-64 17

65+ 8

Male 19

Female 21



Cyber Monday 2015
(online only)

20

37

31

23

15

5

20

24

Either

34

51

48

34

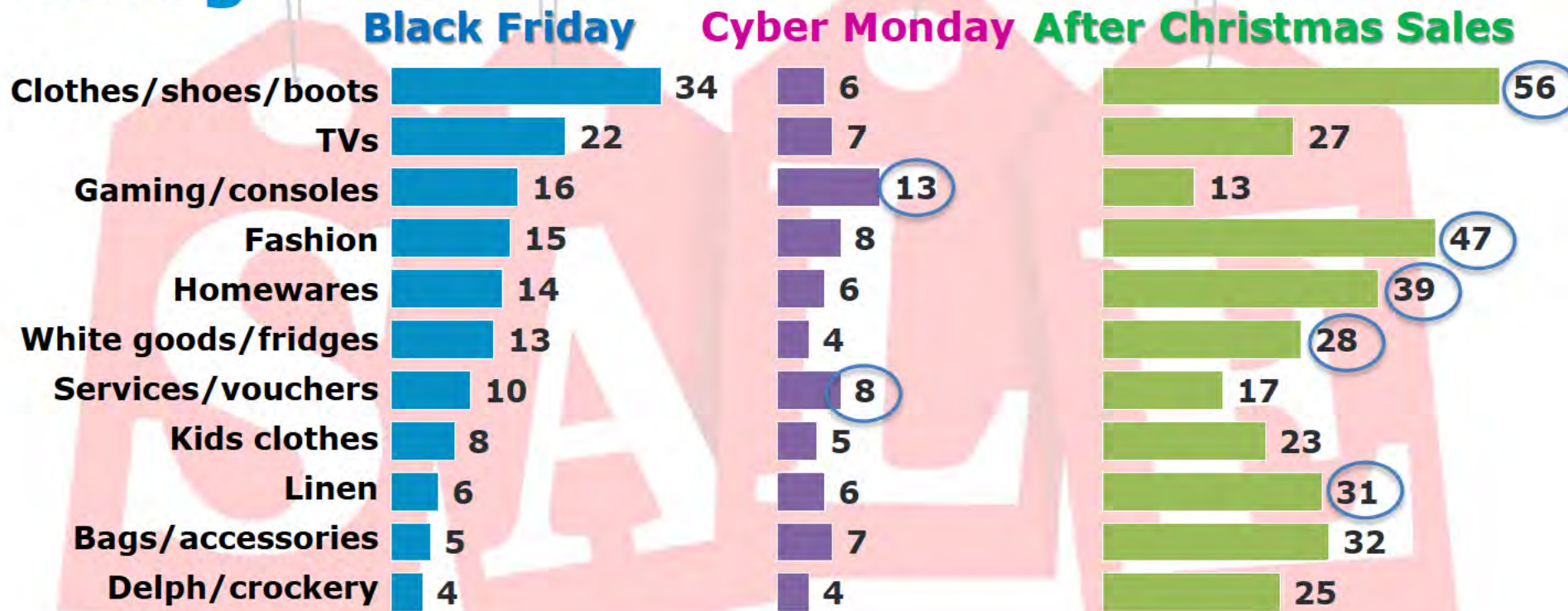
26

11

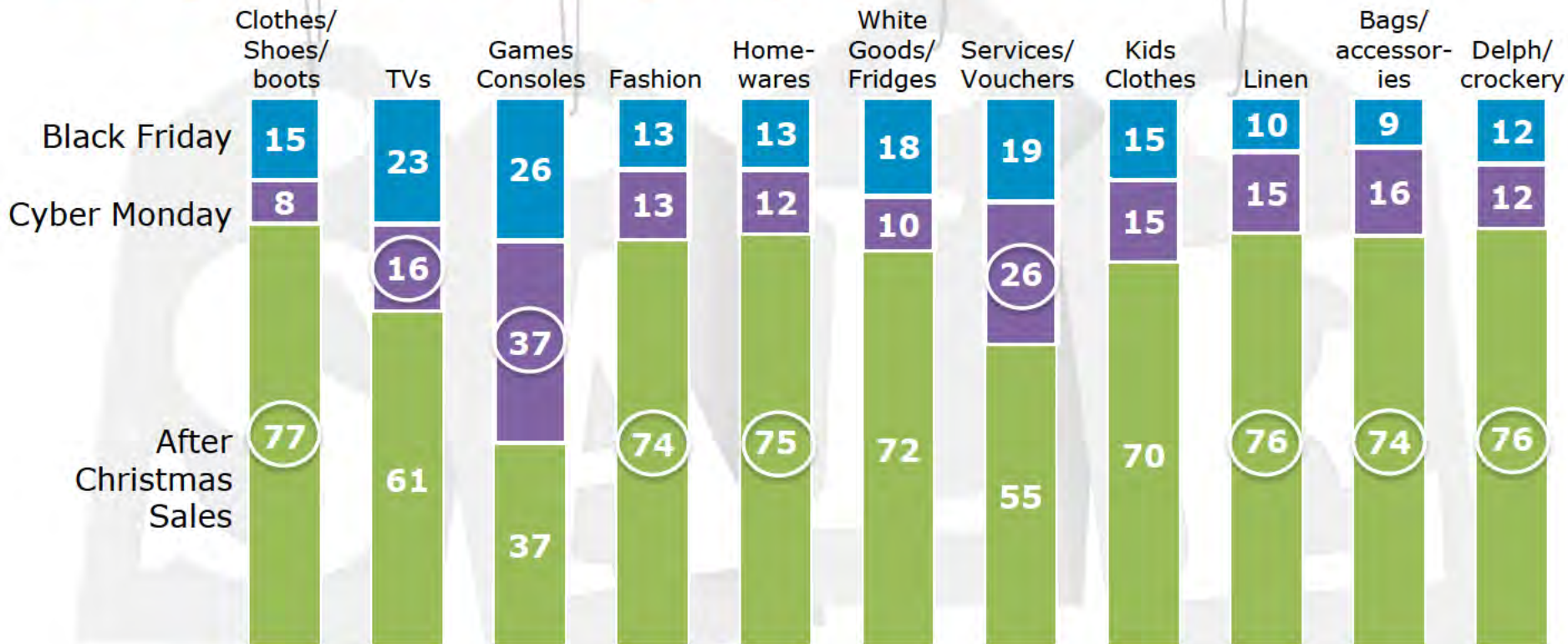
31

37

When most likely to buy specific categories



Projected category shares

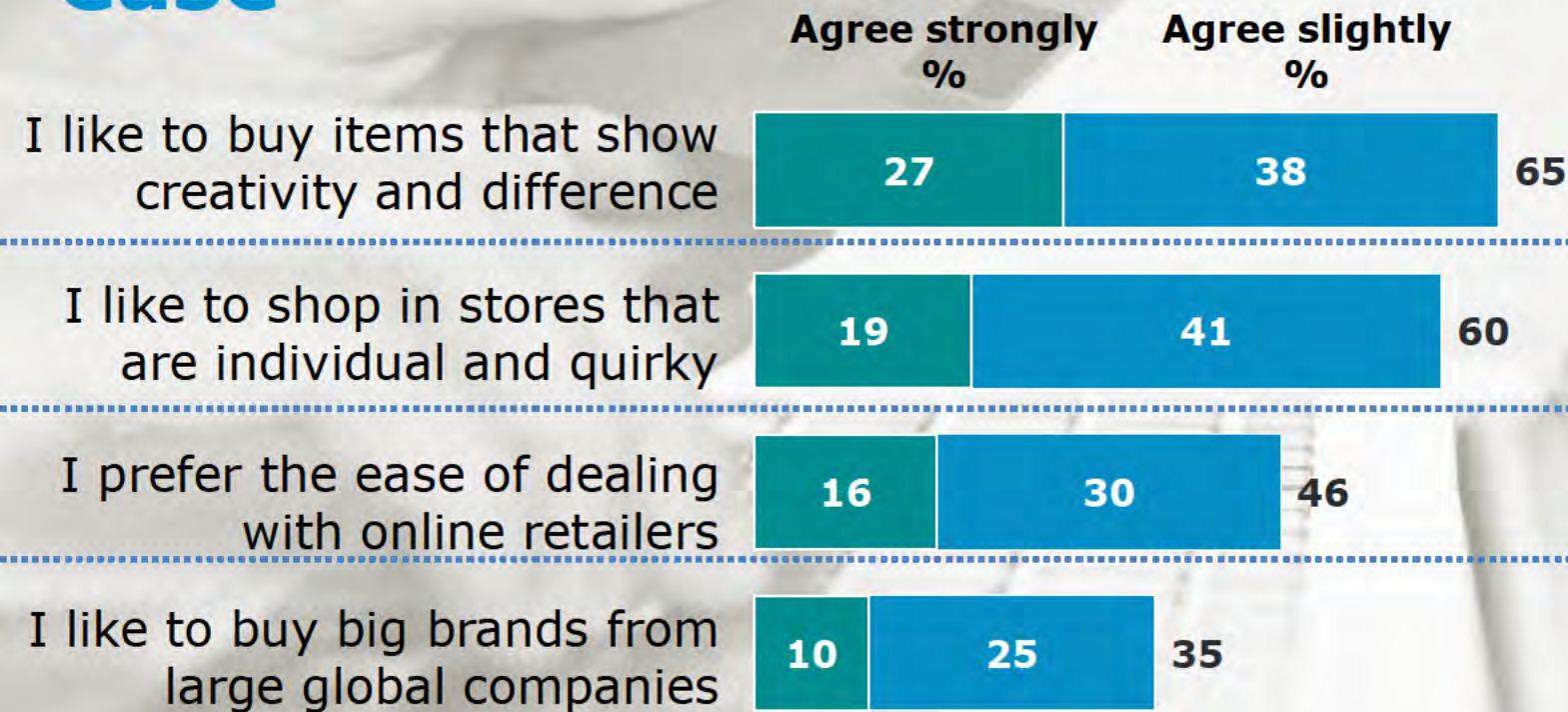


Some retailers get an earlier and more profitable start to the season

**Does this all
change what
we want?**



Individual & distinctive trumps size & ease



Key Insights

- **We might prefer shops but we all have to do digital.**
- **The margin under 35 is negligible and many traditionalists are online sometimes.**
- **Younger shoppers are more engaged by everything and much more integrated with retailers and brands online.**
- **Digital impact probably depressing retailer margins to online levels and leading to promiscuity.**
- **Technology is vital and 45% want an enduring relationship with brands and retailers: international brands are further ahead.**
- **36% are influenced by social media when shopping and choosing products.**
- **Fashion is very online oriented.**
- **A third of Christmas was online last year....40% predicted for 2016.**
- **20% bought on Cyber Monday with vouchers and home electronics/gaming prominent.**
- **We still show a strong bias towards quirky and creative products over big brands from global corporations: omnichannel doesn't change our tastes.**

Thank You



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