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# Overview of our Research

Who did we speak to?

Background

- Tryzens commissioned an extensive research project targeted at both eCommerce Directors and Consumers

- This research identified what consumers really want when shopping online and in store, and the current priorities of eCommerce Directors

- We wanted to answer the following questions;
  - What makes a consumer buy from a website, and what doesn't?
  - Are delivery methods and payment options really that important?
  - What do you think retailers should be focused on?
  - Were the priorities of eCommerce directors aligned with consumers?

We spoke to … Consumers

- 1,000 UK based online consumers
- From all age groups over 16
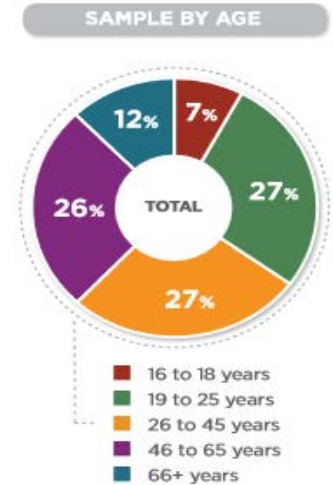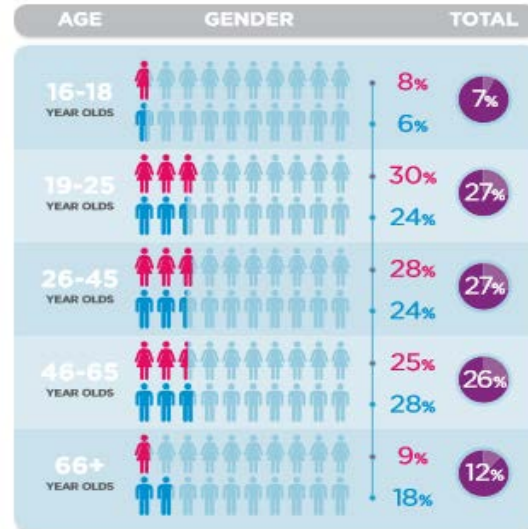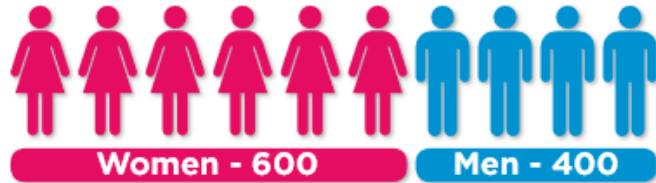
We spoke to … eCommerce Directors

- 100 decision makers in retailer organisations (IT & eCommerce)

- Retailers had to have at least one physical store and one website

- Minimum £2 million turnover in UK

Consumer demographics

What did we learn about our consumers?
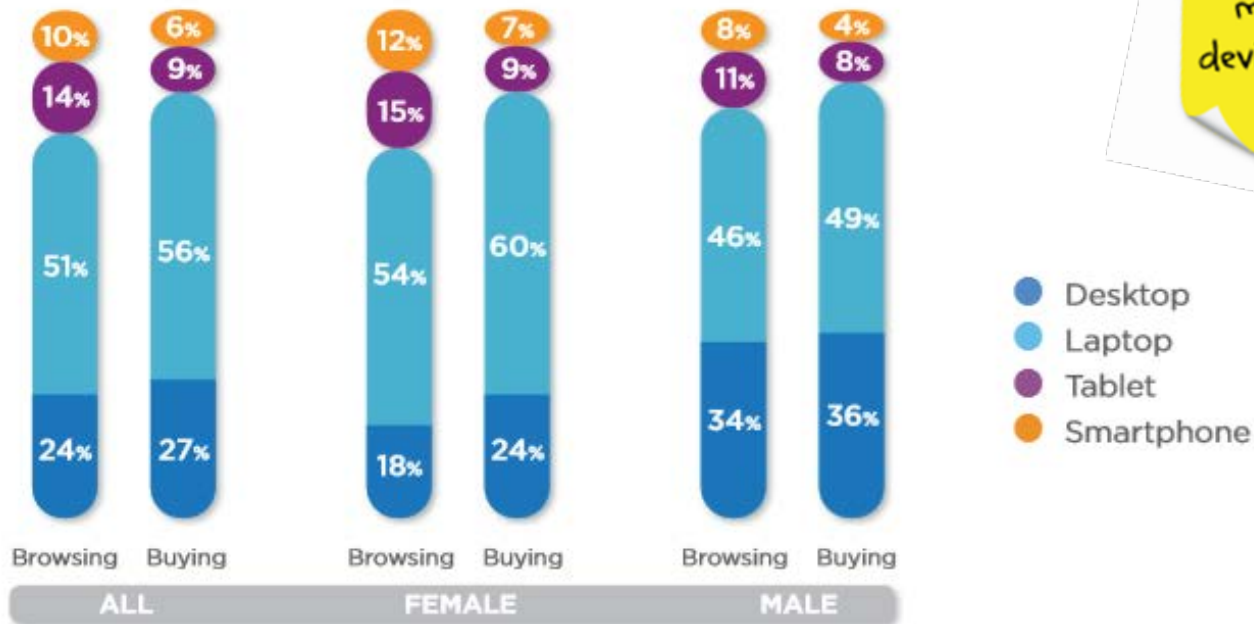
The average person spends >£6k online annually

Approximately how much does your household spend online in a month?

Women £475

Men £686

£ spend   0   100   200   300   400   500   600   700   800   TOTAL

Legend:
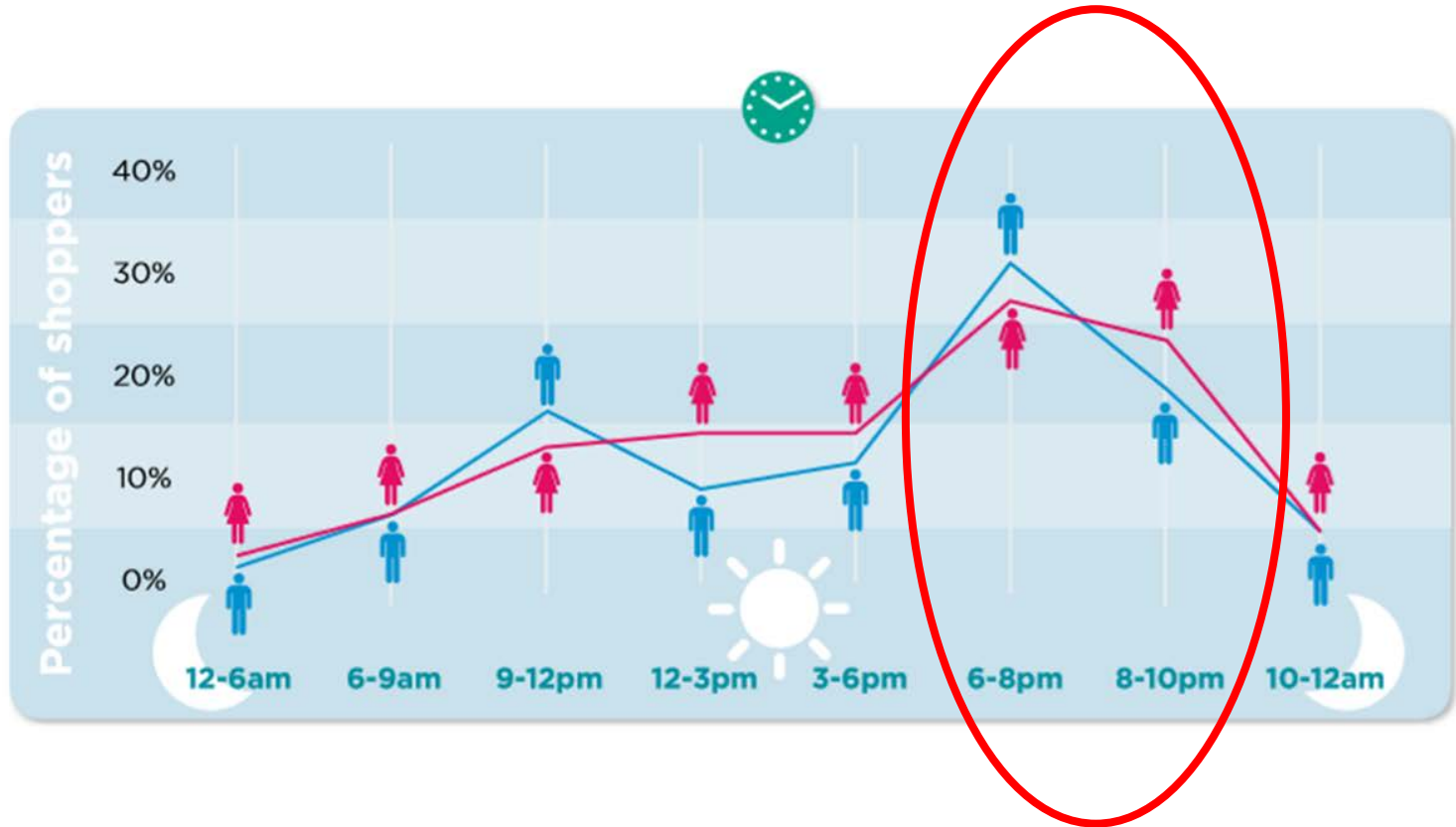- Travel
- Food/grocery shopping
- Fashion/apparel
- Events/tickets
- Sportswear
- Electronics
- Health & beauty
- Physical books/games/videos/music CDs
- Digital books/ games/videos/music
- Gifts
- Luxury goods
- Furniture & furnishings

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Using a laptop the majority of the time

Laptops represent the most popular device for online shopping

Between 6pm and 10pm

Frequency of shopping is not a Gender issue

LAST PURCHASED ONLINE?	TOTAL	FEMALE	MALE
Last week	64%	66%	63%
Last month	29%	27%	32%
Last 3 months	7%	8%	6%
Base	1000	600	400

Women spend 14% more time shopping online
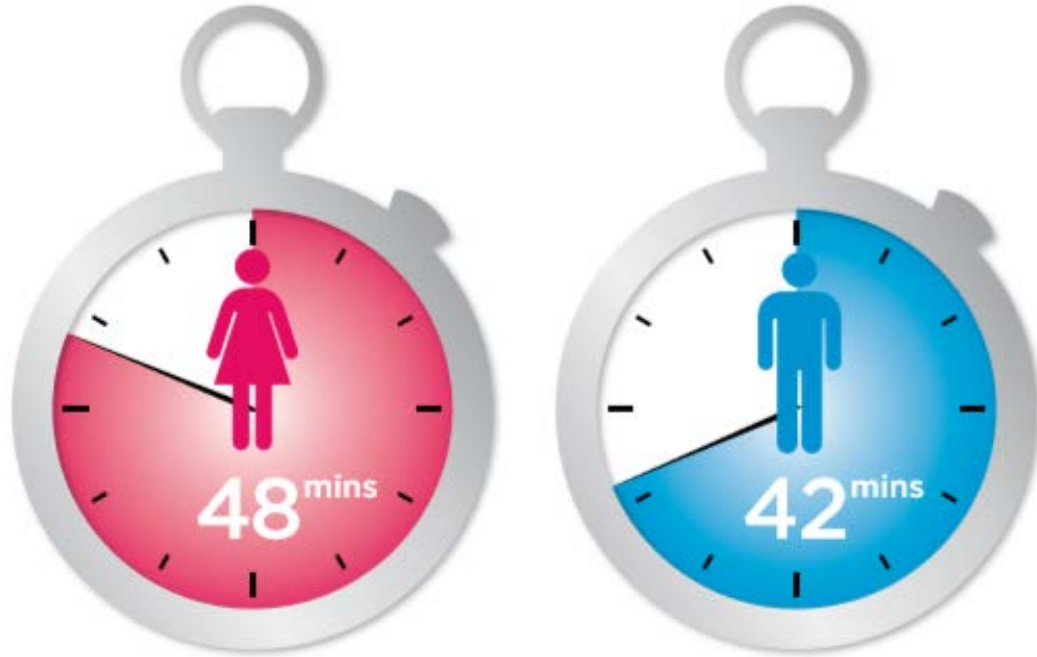
But Men outspend Women by 44%

UK average spend online is £559.41 per month

£475

£686

Travel
Food/grocery shopping
Fashion/apparel
Events/tickets

Sportswear
Electronics
Health & beauty
Physical books/games/
videos/music CDs

Digital books/ games/
videos/music
Gifts
Luxury goods
Furniture & furnishings

Male spending in these categories is at least twice females

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26-45 year olds are the most active online…

LAST PURCHASED ONLINE?	16-18	19-25	26-45	46-65	65+
Last week	51%	64%	71%	63%	61%
Last month	44%	29%	24%	30%	29%
Last 3 months	5%	7%	5%	8%	10%
Base	**73**	**274**	**266**	**263**	**124**

PURCHASES ONLINE	16-18	19-25	26-45	46-65	66+
Average monthly spend	£585	£685	£728	£389	£269
Average			**£559**		

Shopping across verticals is the 'norm'
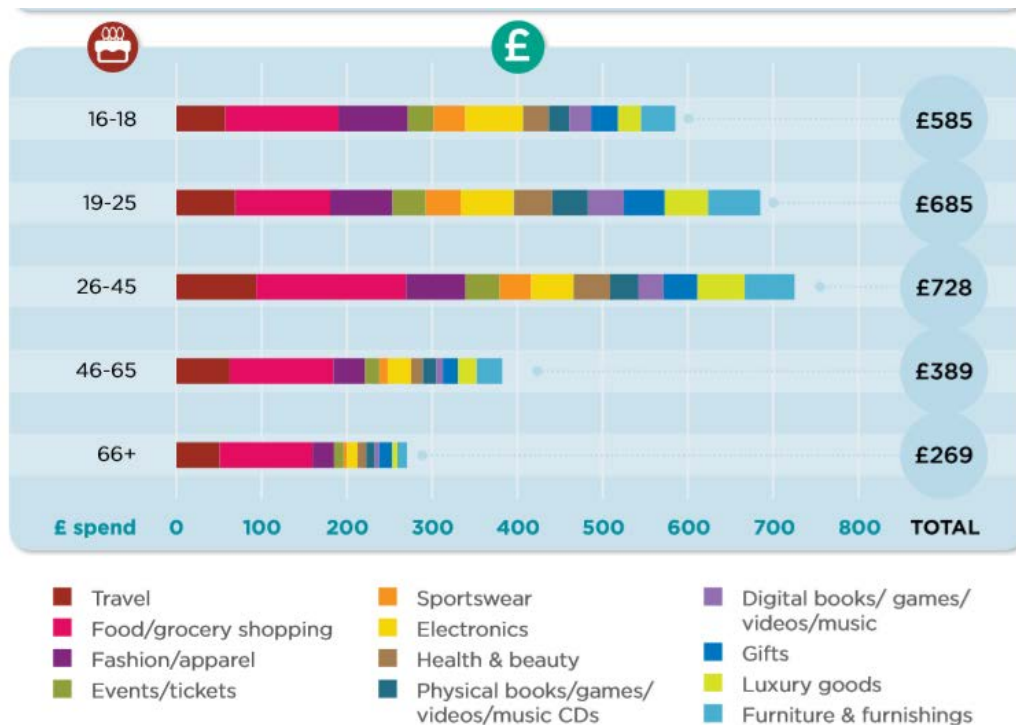
Online shopping is common place across all verticals by gender, age and income

	£ spend
16-18	£585
19-25	£685
26-45	£728
46-65	£389
66+	£269

£ spend: 0 100 200 300 400 500 600 700 800 TOTAL

Legend:
- Travel
- Food/grocery shopping
- Fashion/apparel
- Events/tickets
- Sportswear
- Electronics
- Health & beauty
- Physical books/games/videos/music CDs
- Digital books/games/videos/music
- Gifts
- Luxury goods
- Furniture & furnishings

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What Consumers Like

What do consumers most value?

Note: 79% of consumers most value the "shop anytime" eCommerce experience

RETAIL PREFERENCES	TOTAL	FEMALE	MALE
I can shop at any time	79%	80%	79%
Search best rates/prices	62%	63%	61%
Range of products	57%	57%	57%
Delivery options	43%	45%	39%
Speed of service	38%	37%	40%
None of the above	2%	2%	2%
Base	1000	600	400

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And how do they like to keep in touch?

Email is still the most accepted method of contact between retailers and consumers

| Preferred communication method	Combined %	Ranked		Top choice %
Email	77%	«« 1	1 »»	51%
Online catalogue	41%	««« 2	7 »»	6%
Loyalty programme	38%	««« 3	3 »»	8%
In-store experience	32%	««« 4	4 »»	7%
Physical catalogue	29%	««« 5	5 »»	7%
Social media	23%	««« 6	6 »»	7%
Text message	14%	««« 7	8 »»	1%
Notifications via an app	11%	««« 8	9 »»	1%
I never want to hear from retailers	10%	««« 9	10 »»	0%
Telephone call	3%	««« 10	11 »»	0%
Other	2%	««« 11	2 »»	10%

How do consumers find offers online?

Search engines remain the primary tool used by consumers to find retailers or offers

SEARCH METHOD	TOTAL	FEMALE	MALE
Search engine	48%	46%	50%
Email from retailer	42%	43%	41%
Friend's	32%	33%	31%
TV ad	30%	29%	32%
Retailer's social media	13%	14%	12%
Print ad	9%	7%	13%
An app	5%	5%	4%
Other	3%	3%	3%
Base	1000	600	400

…but there are variances by age…

Generation Consumer rely on social media over print advertising
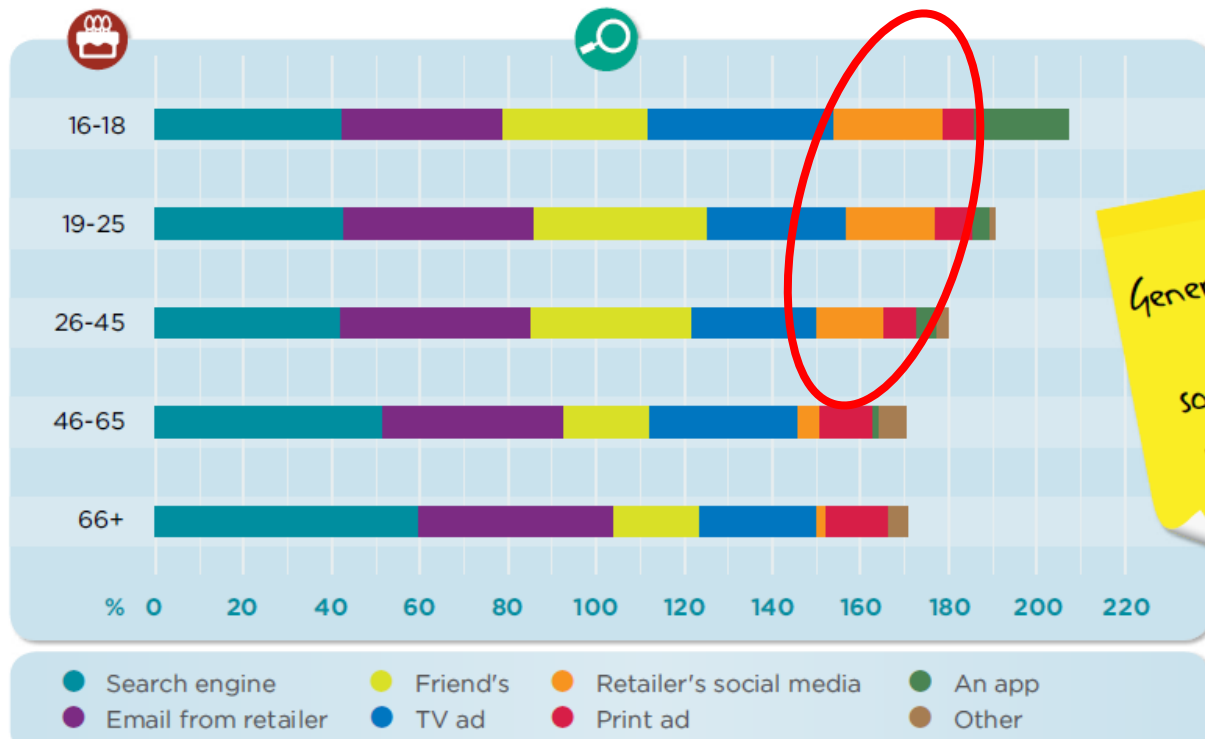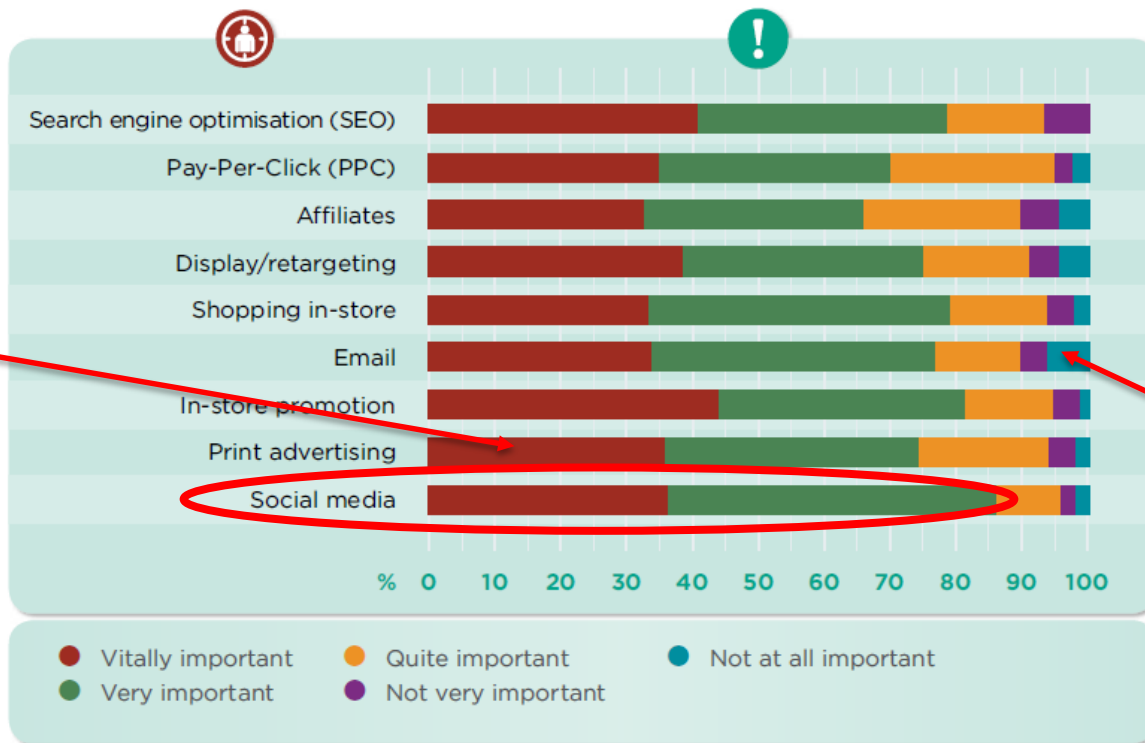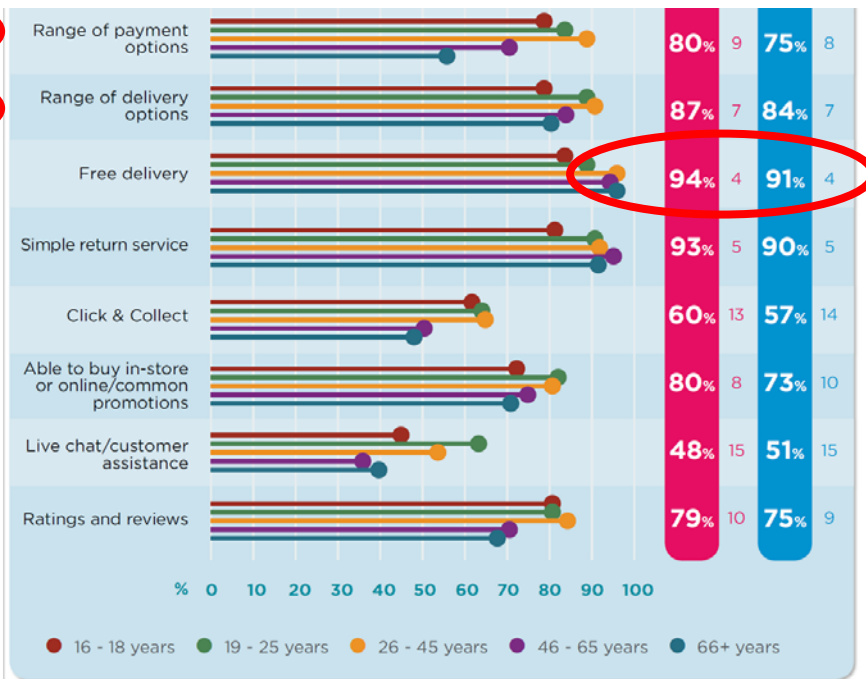
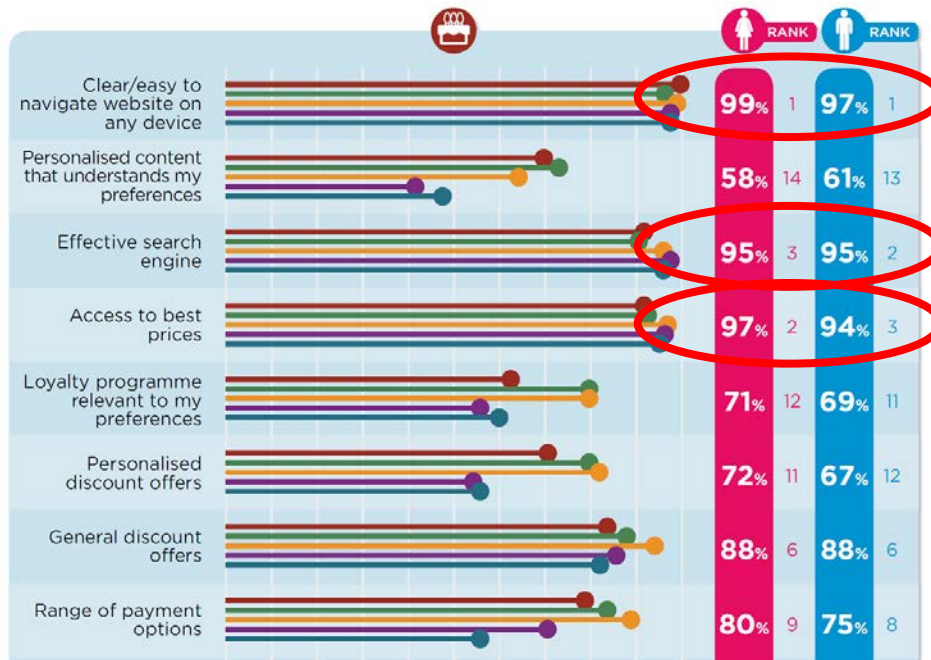# …and how are retailers promoting offers?

Retailers are investing heavily in anticipation of social media returns

35% of retailers view as vitally important – only 9% of consumers agree

Over 10% of retailers don't view as important, 77% of consumers do

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Which features are most important?
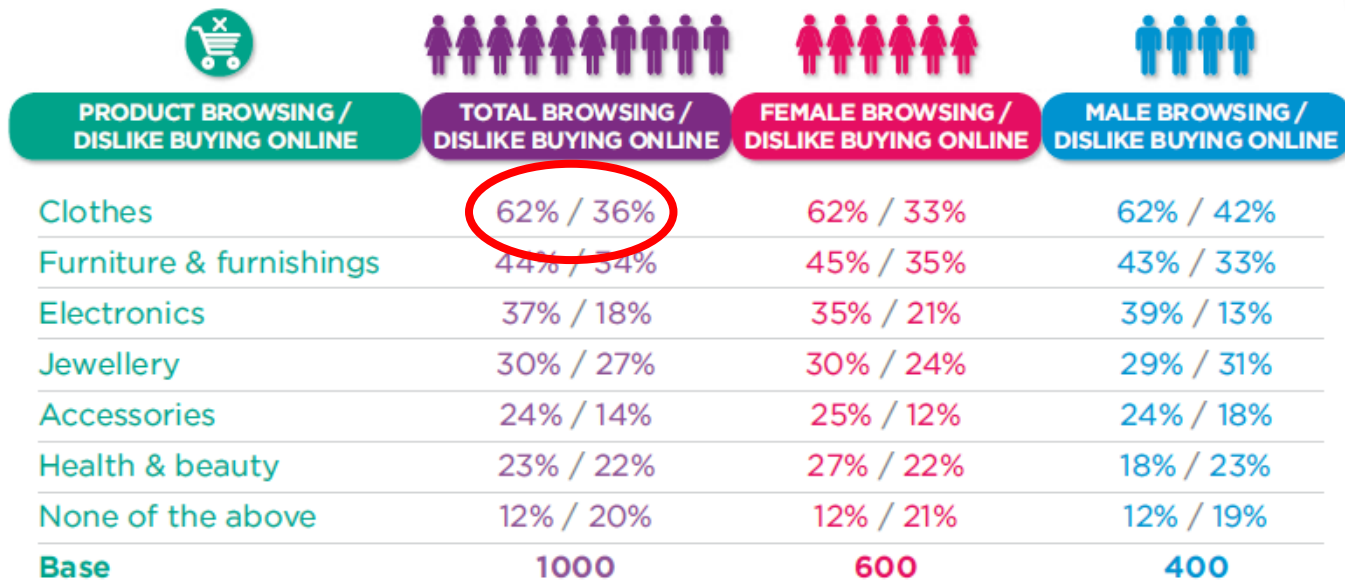
And how does this vary be age?

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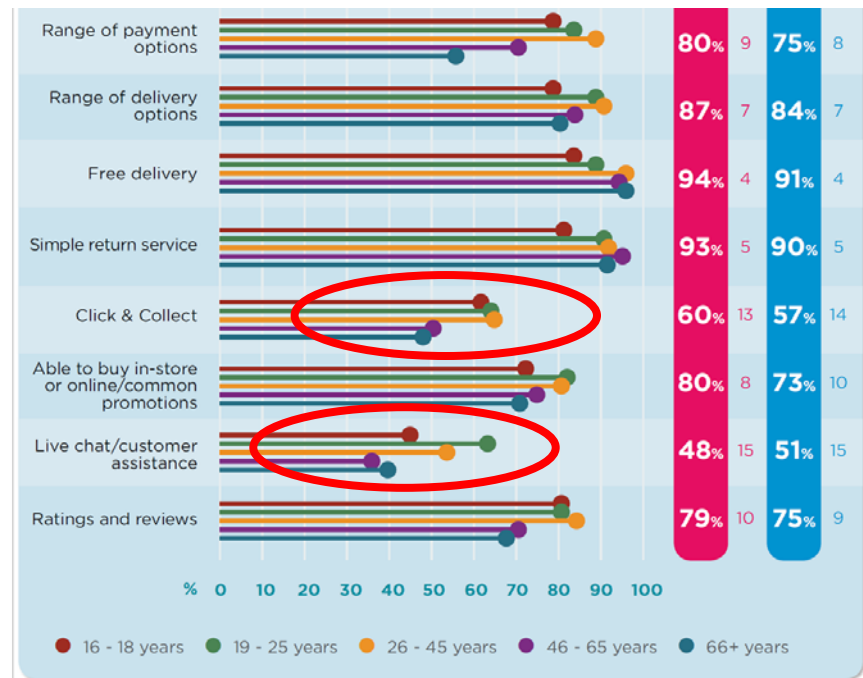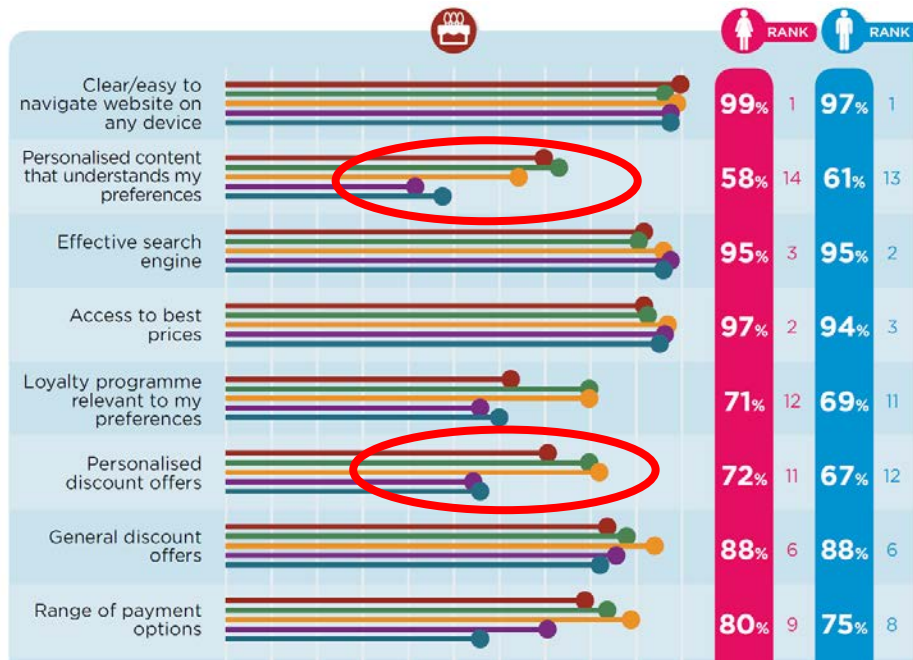
Key reasons not to shop online

Credit card security fears around online shopping collectively weigh heavy on the minds of consumers

Which products do you prefer to buy in store?

PRODUCT BROWSING / DISLIKE BUYING ONLINE	TOTAL BROWSING / DISLIKE BUYING ONLINE	FEMALE BROWSING / DISLIKE BUYING ONLINE	MALE BROWSING / DISLIKE BUYING ONLINE
Clothes	62% / 36%	62% / 33%	62% / 42%
Furniture & furnishings	44% / 34%	45% / 35%	43% / 33%
Electronics	37% / 18%	35% / 21%	39% / 13%
Jewellery	30% / 27%	30% / 24%	29% / 31%
Accessories	24% / 14%	25% / 12%	24% / 18%
Health & beauty	23% / 22%	27% / 22%	18% / 23%
None of the above	12% / 20%	12% / 21%	12% / 19%
Base	**1000**	**600**	**400**

62% of consumers still prefer to try clothes in-store before buying online

What stops consumers buying?
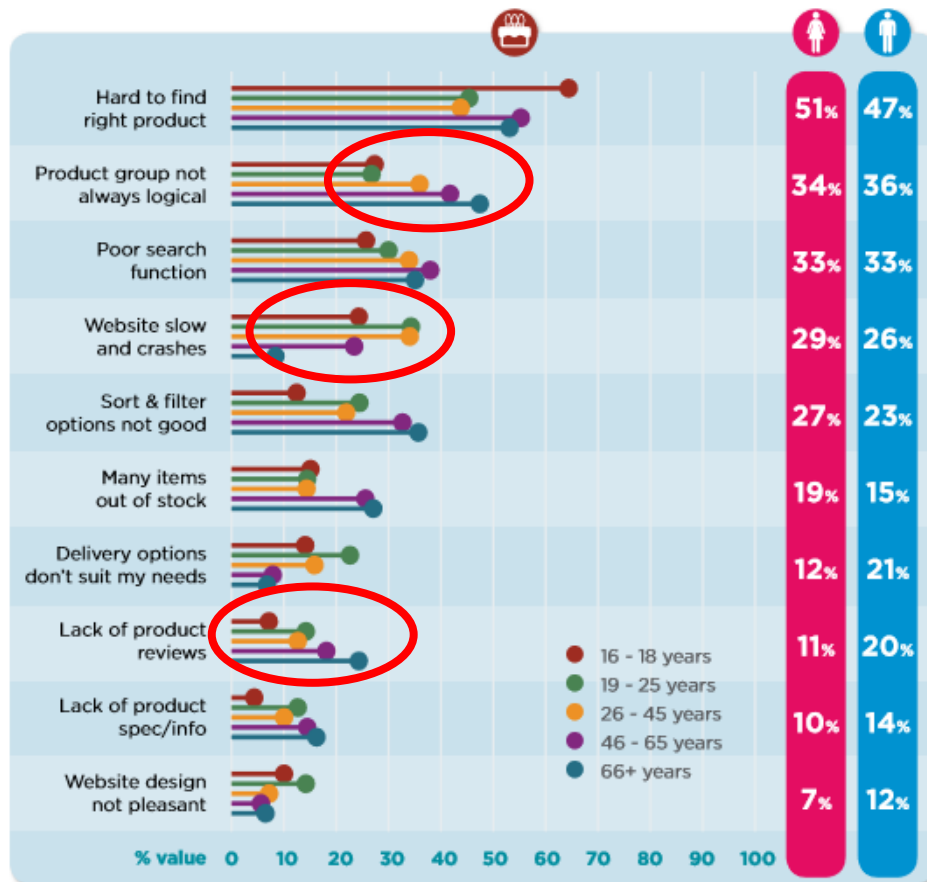
Where do consumers think retailers can improve

42% More sorting / filter options
24% More consumer reviews
12% Customise website to my tastes (personalisation)
12% Customise product groups
5% More professional reviews
5% Other

35% More sorting / filter options
23% More consumer reviews
16% Customise website to my tastes (personalisation)
9% Customise product groups
10% More professional reviews
7% Other

Legend:
- More sorting / filter options
- More consumer reviews
- Customise website to my tastes (personalisation)
- Customise product groups
- More professional reviews
- Other

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In summary

Key things to consider on your way back to the office…

In summary

- Getting the basics right is key for consumers
  - Have you asked your customers what they would like to see?
  - Is your website ranking as well as it could in search engines?
  - Have you optimised your e-mail campaigns?
  - Do you make use of extended SSL certificates and trust icons in checkout?
  - Does onsite search provide a high level of relevance in the results?
  - Are you focused on increasing conversion of existing users, before adding more traffic?
- Online preferences vary significantly by age, but not by gender
  - Do you know the age profile of your consumers?
  - Are you focused on the right features for your target customer?
  - For younger customers : are you personalising your offers, offering live chat and social customer service
  - For older customers : are you providing the right search refinements and options, are reviews credible and prominent and is it easy to find the product you want

Any questions?

To download the full report:

www.tryzens.com/expertresearch

Further information:

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