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Global Multichannel Survey 2013 India

September 2013

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Introduction

PwC's Global Retail and Consumer practice, in conjunction with the International Survey Unit (ISU), administered a global survey to understand and compare consumer shopping behaviours and the use of different retail channels across 15 territories: Brazil, Canada, China/Hong Kong, France, Germany, India, Italy, Middle East, Netherlands, Russia, South Africa, Switzerland, Turkey, UK and US.

A team of subject matter specialists representing each participating territory developed the survey based on last year's survey. The final survey for 2013 includes updated questions and answer options in addition to a new section on mobile shopping. Where possible and appropriate, last year's questions have been retained in order to conduct year-on-year comparisons. Research Now, an external provider, carried out the survey in July and August 2013, resulting in 1,000 completed responses in every territory.

Chart packs are available for both global results and country-specific results and can be requested through Claire-Louise Moore and Michael Brigoli.

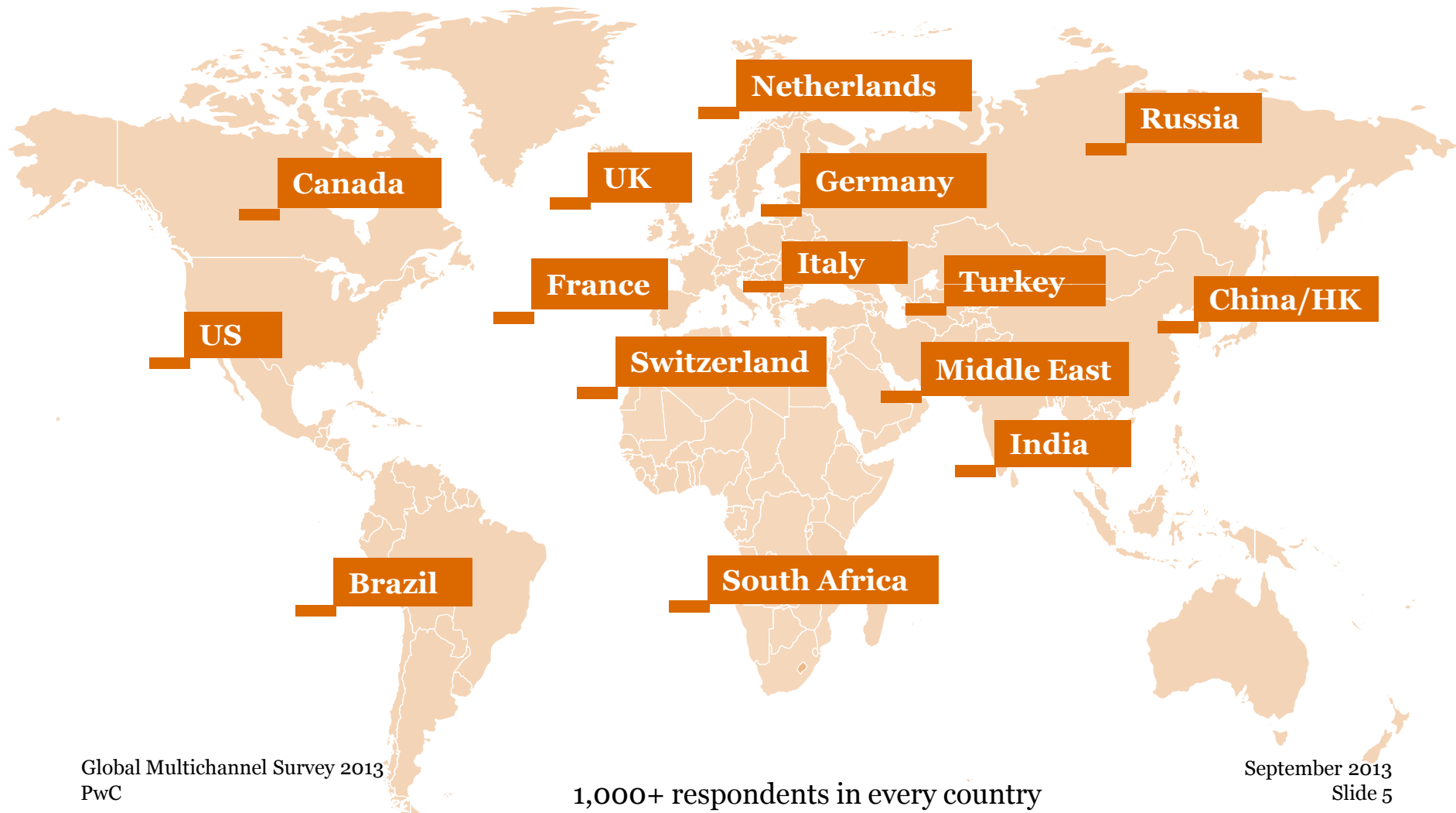
This document contains the results of the multichannel research conducted in India.

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Methodology

Global research: Consumer shopping behaviour & Multichannel activity across the world



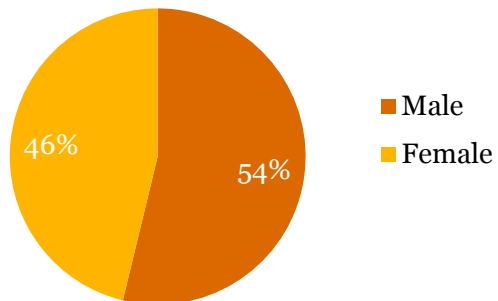
Methodology

- 15,080 online interviews conducted across 15 territories during July/August 2013.
- In order to survey the most appropriate audience, online survey respondents in each country are nationally representative by the Research Now (RN) panel profile or online users for the following demographics:
 - Age
 - Gender
 - Employment status
 - Region
- The RN panel profile was used for the majority of the countries except UK, France, Germany and Italy where the national online user profiles were available and applied.

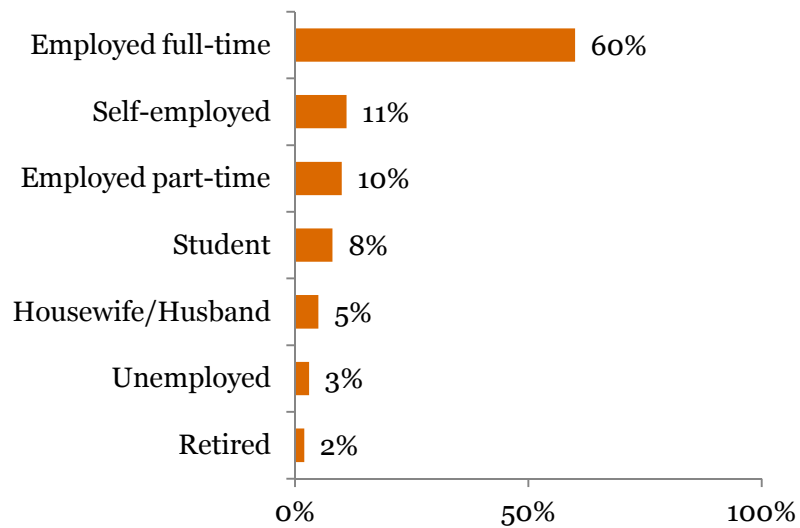
Section I - Demographics

Demographic profile of respondents - India

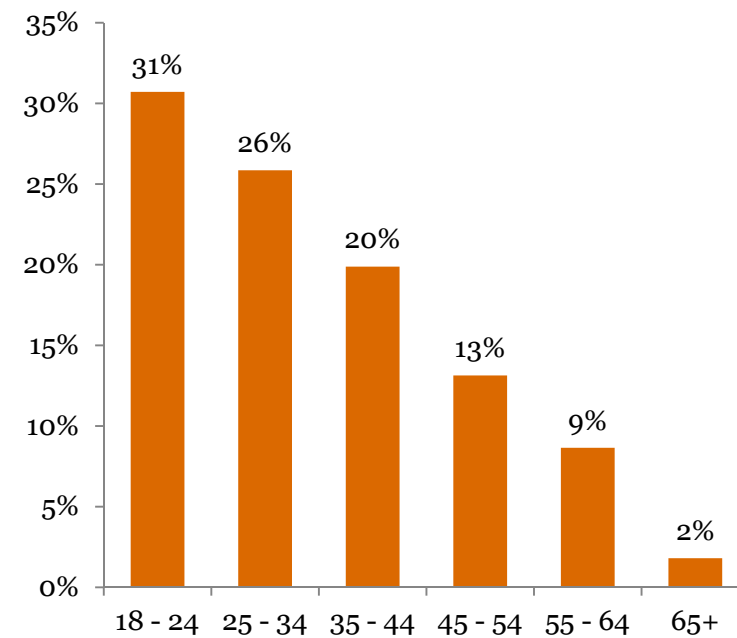
Gender



Employment Status

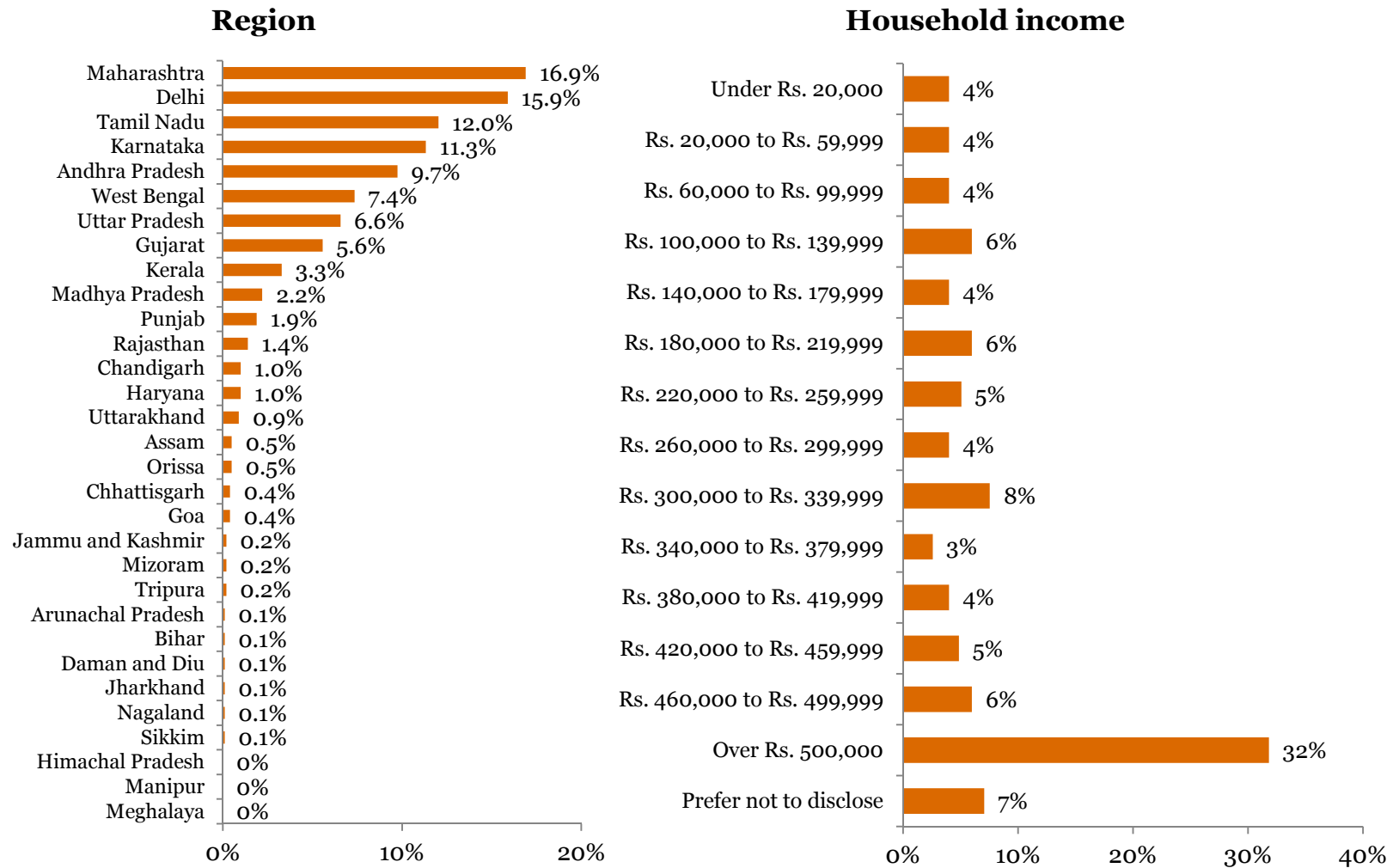


Age



Base: 1006

Region and household income breakdown - India



Section II - Buying behaviours

Q6. On average, how often do you buy products online via your most used device for online shopping?

Q7. Why don't you buy products online?

Q8. How long since you made your first ever online purchase?

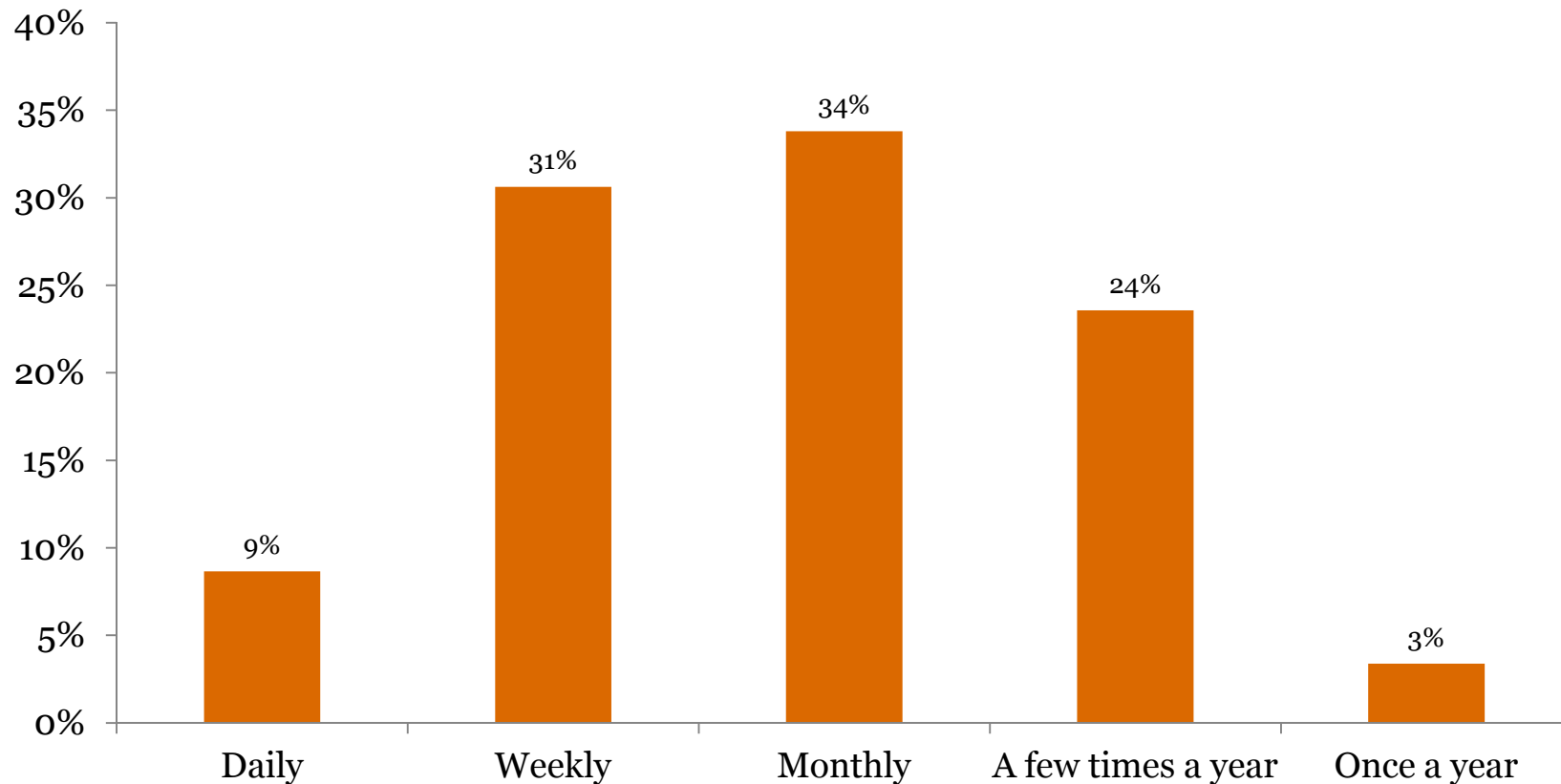
Q9. Why do you buy products online instead of in-store?

Q10. Why do you buy products in-store instead of online?

Q11. Which of the following in-store technologies would make your shopping experience better?

Q12. How often do you buy products using the following shopping channels?

Q6. On average, how often do you buy products online via your most used device for online shopping?



Please note: 42 said they never shop online

Base: 1006

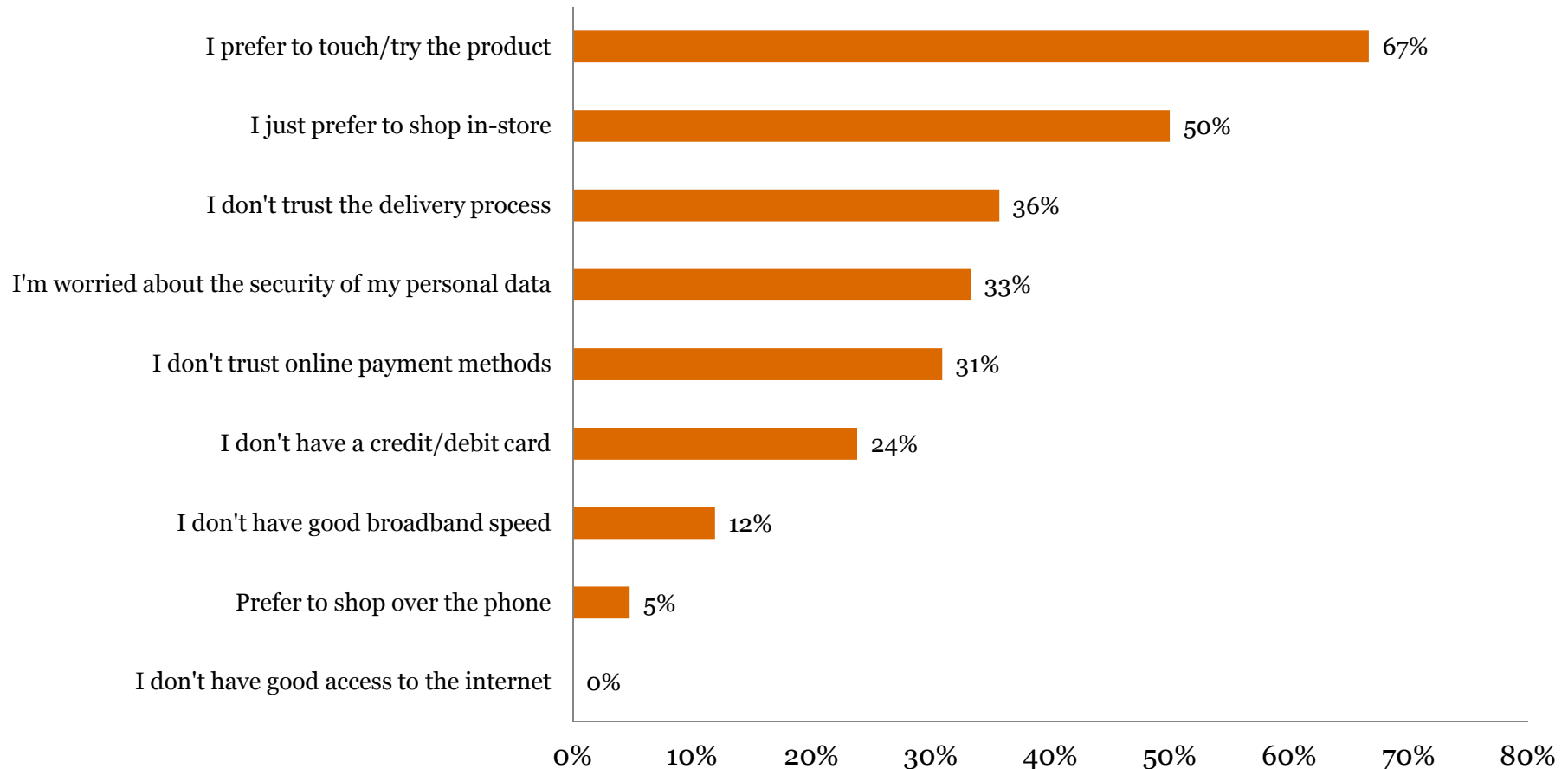
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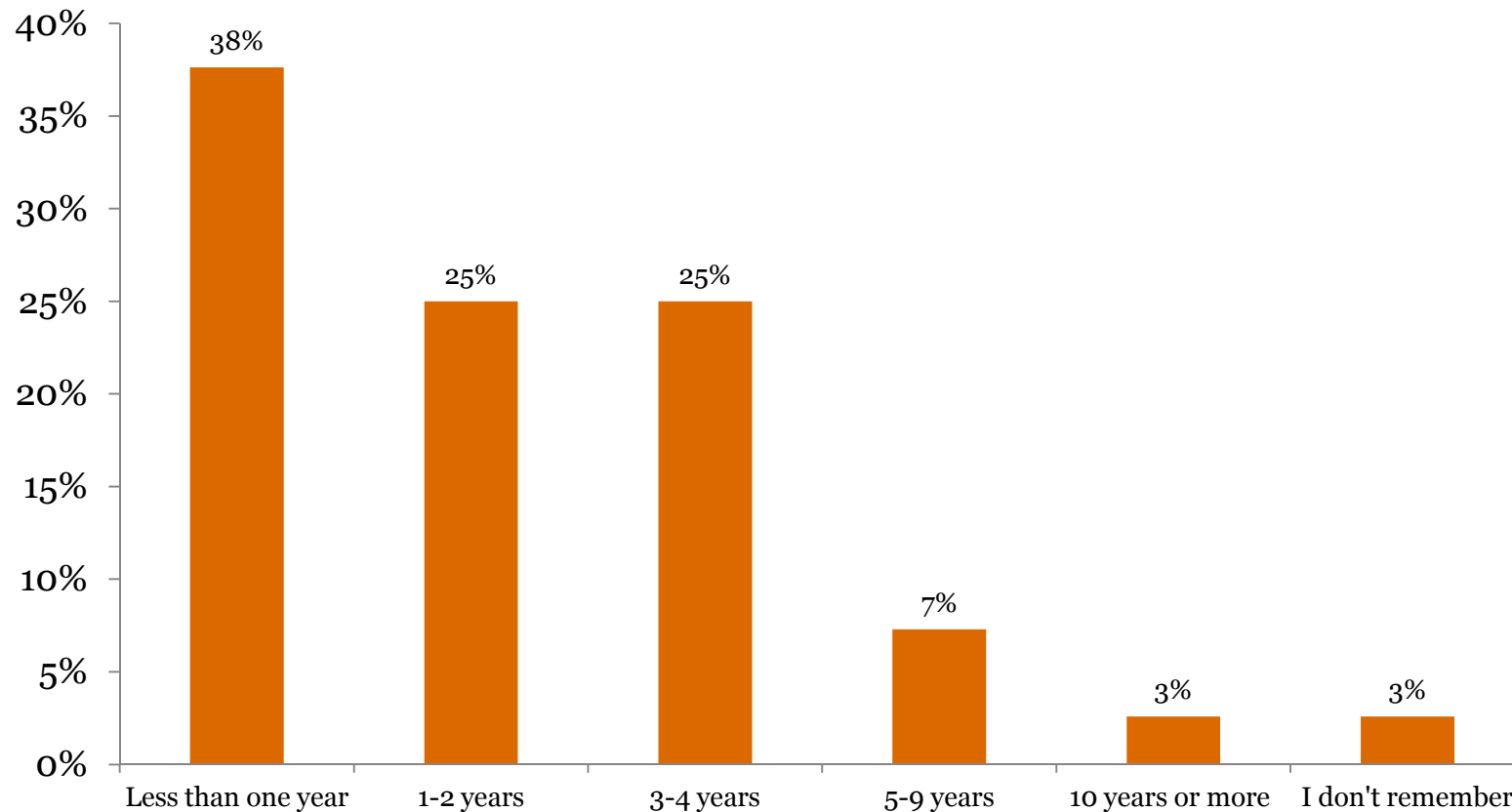
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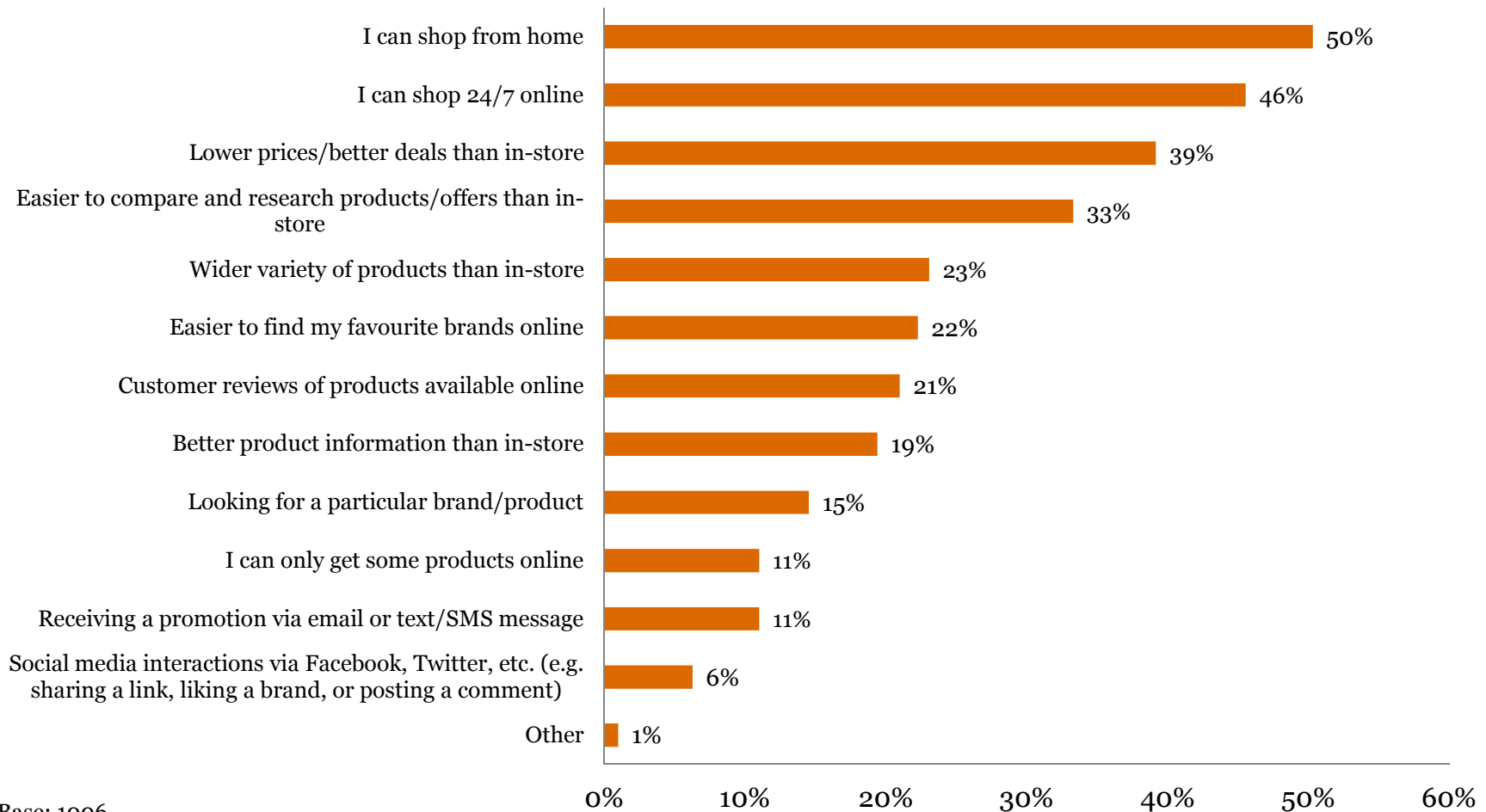
Q7. Why don't you buy products online?



Q8. How long since you made your first ever online purchase?



Q9. Why do you buy products online instead of in-store?



Base: 1006

Note: Respondents had to select their top THREE options.

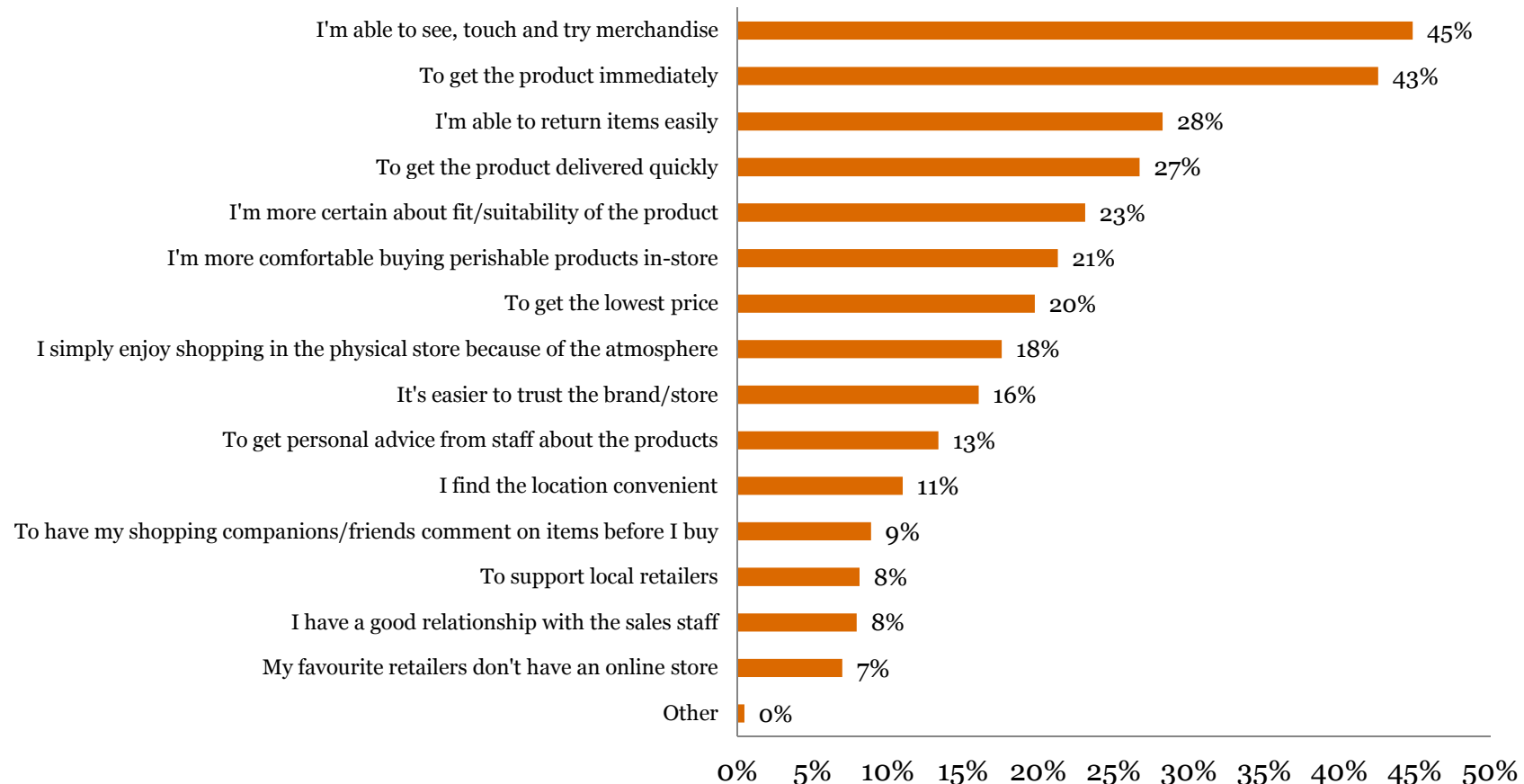
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Q10. Why do you buy products in-store instead of online?



Base: 1048

Note: Respondents had to select their top THREE options.

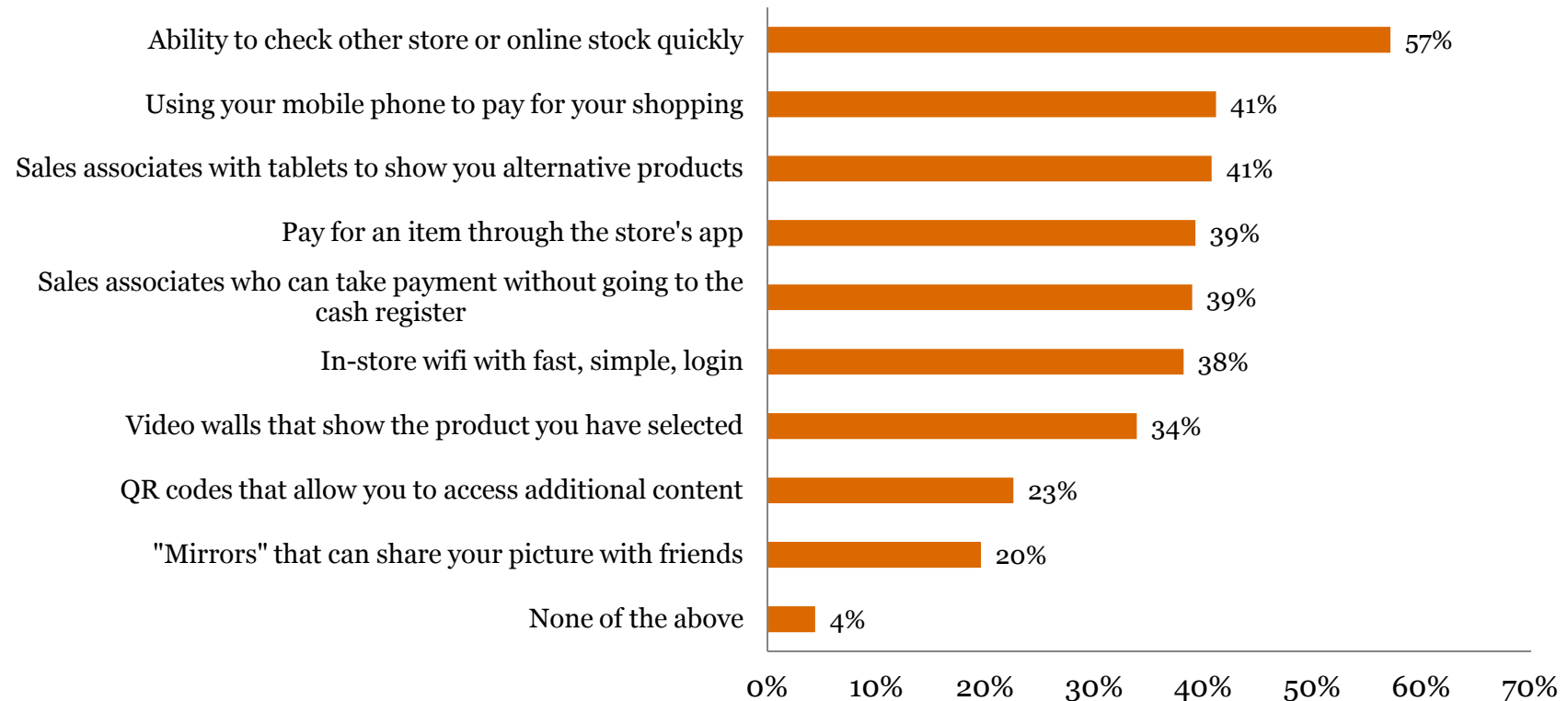
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Q11. Which of the following in-store technologies would make your shopping experience better?

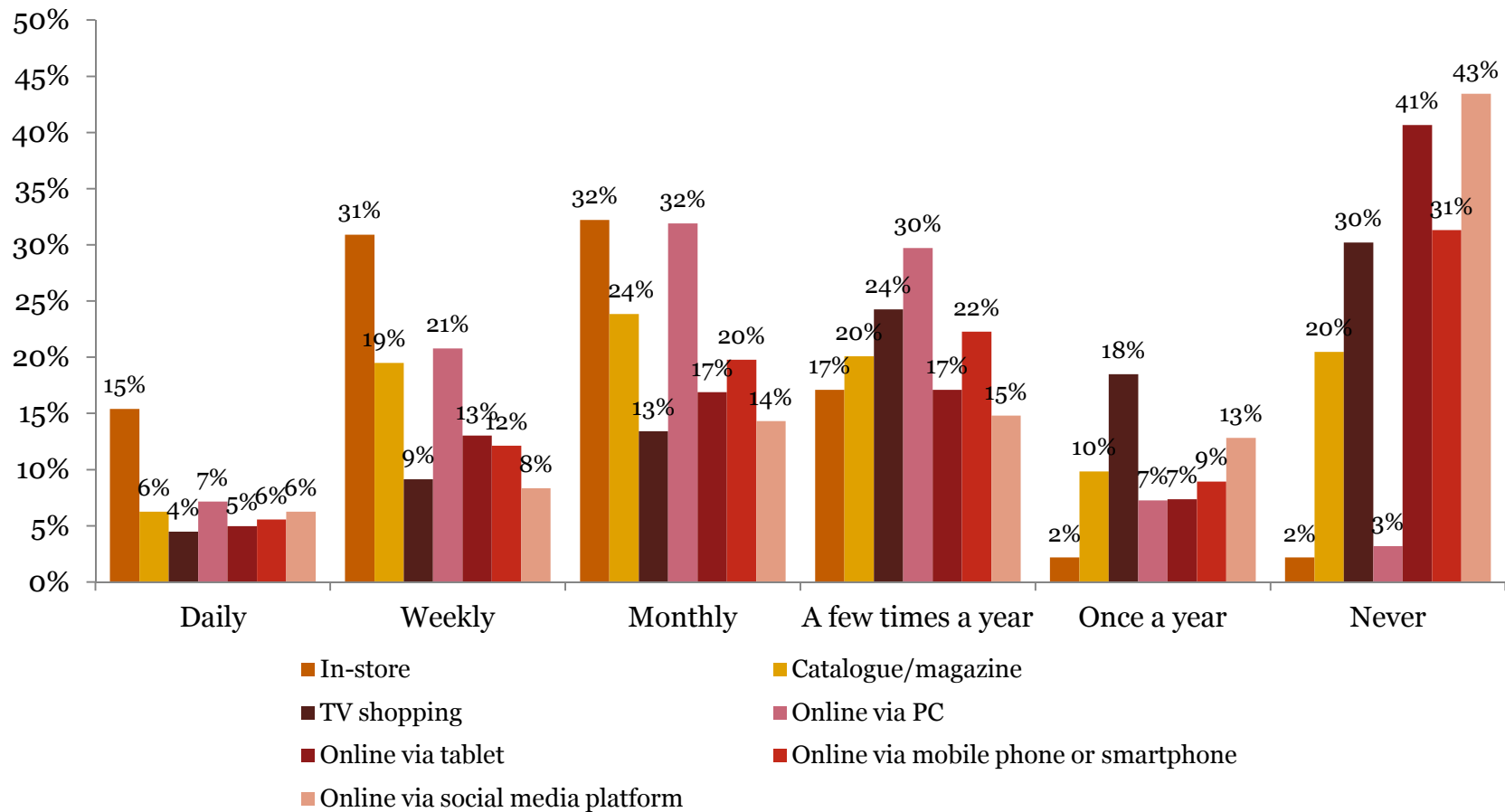


Base: 1006

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Q12. How often do you buy products using the following shopping channels?



Base: 1006

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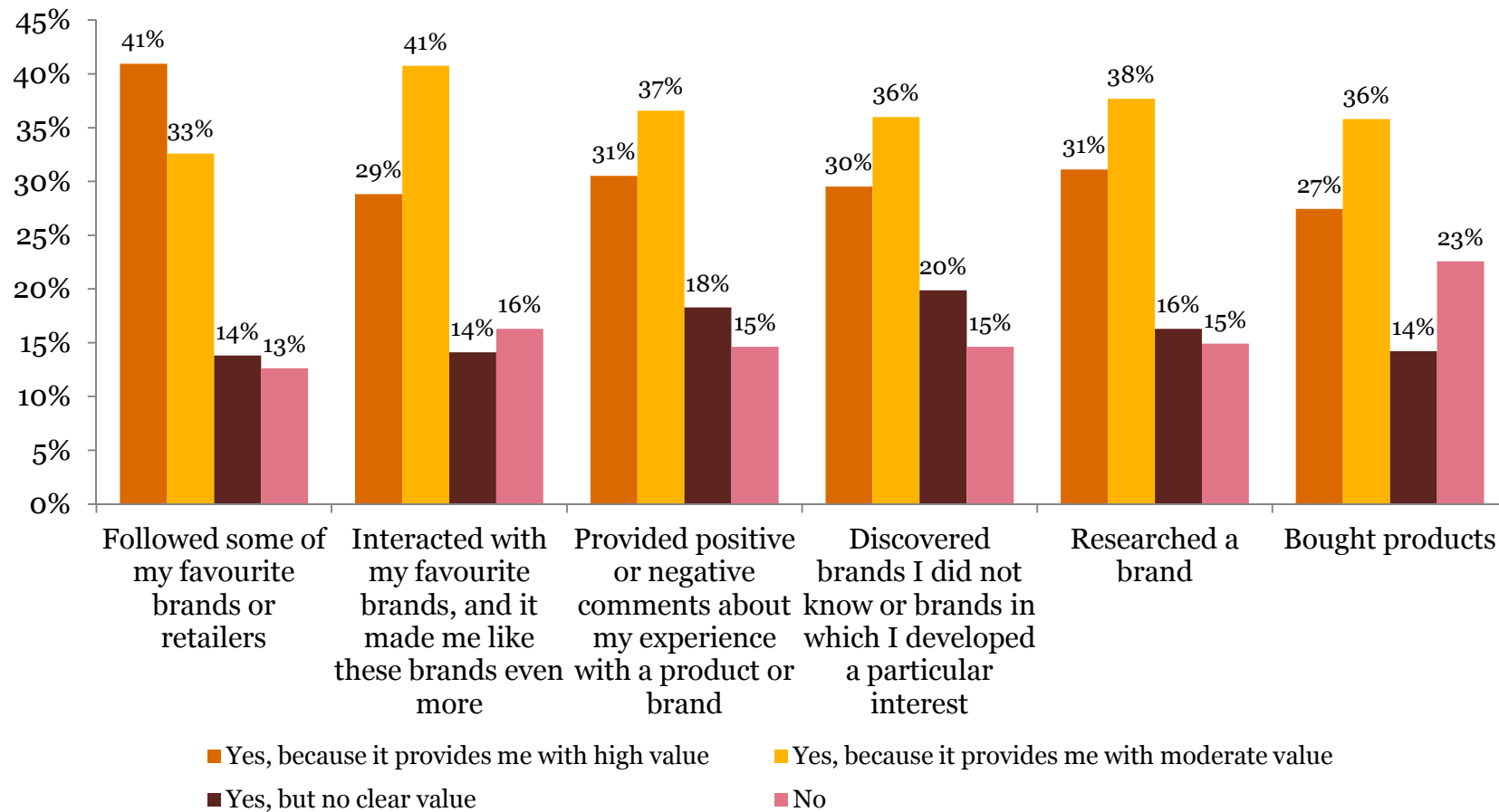
Section III - Social media shopping

Q13. Which of the following have you done using social media...

Q14. Have you researched, browsed or bought products using social media in any of the following product categories?

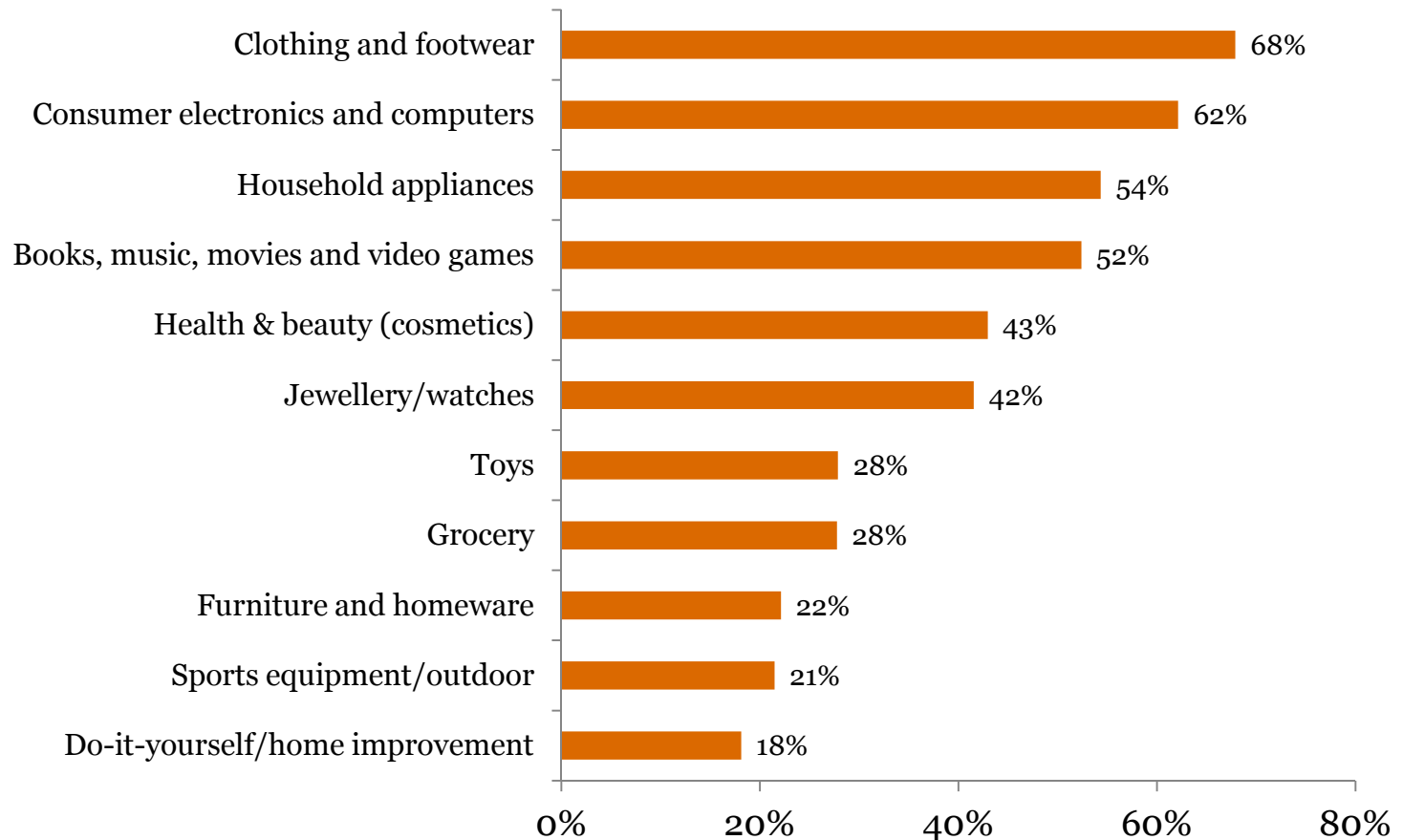
Q15. What attracts you to go to a particular brand's social media site?

Q13. Which of the following have you done using social media...

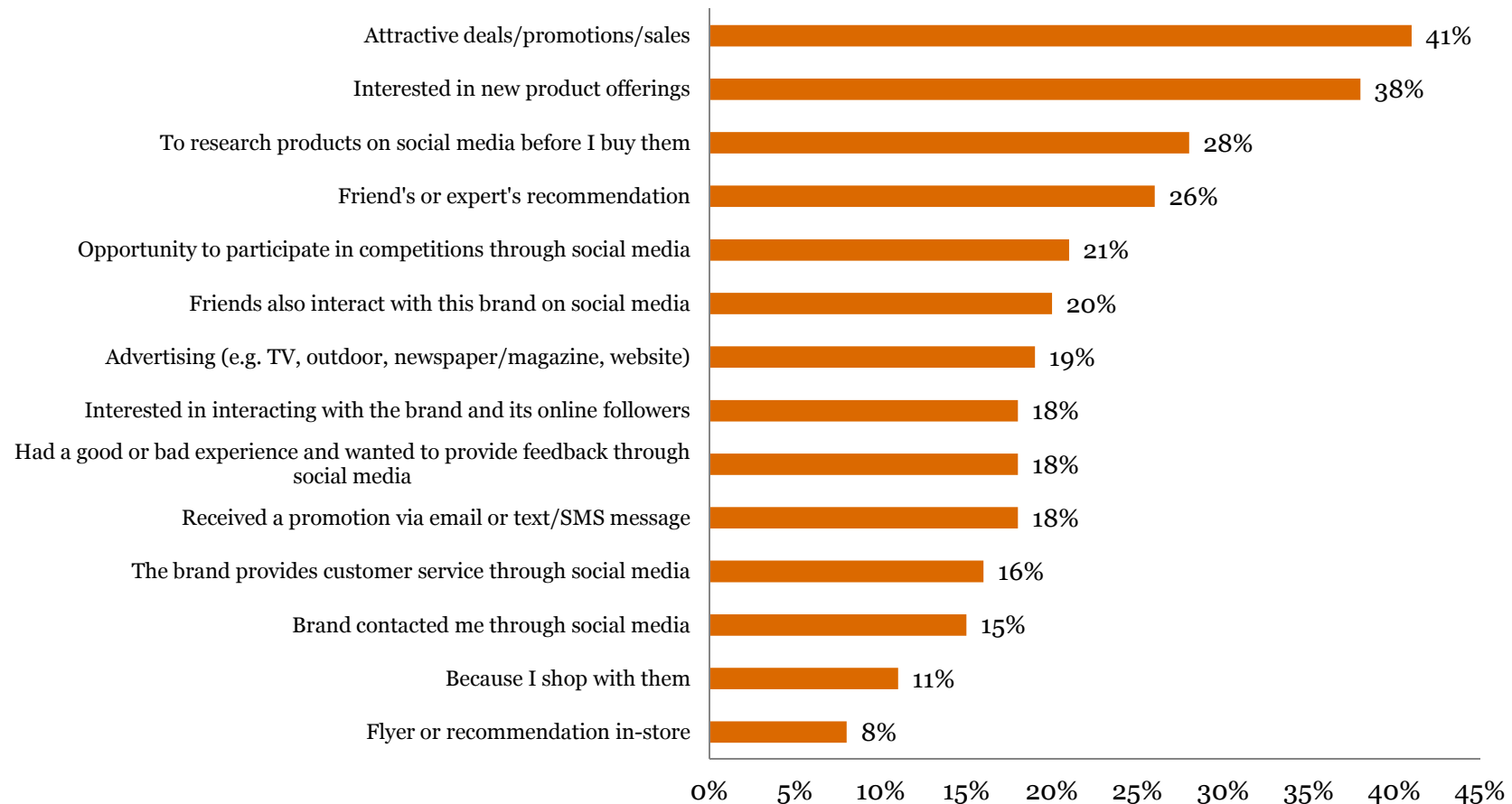


Base: 1006

Q14. Have you researched, browsed or bought products using social media in any of the following product categories?



Q15. What attracts you to go to a particular brand's social media site (e.g. on Facebook)?



Section IV - Mobile shopping

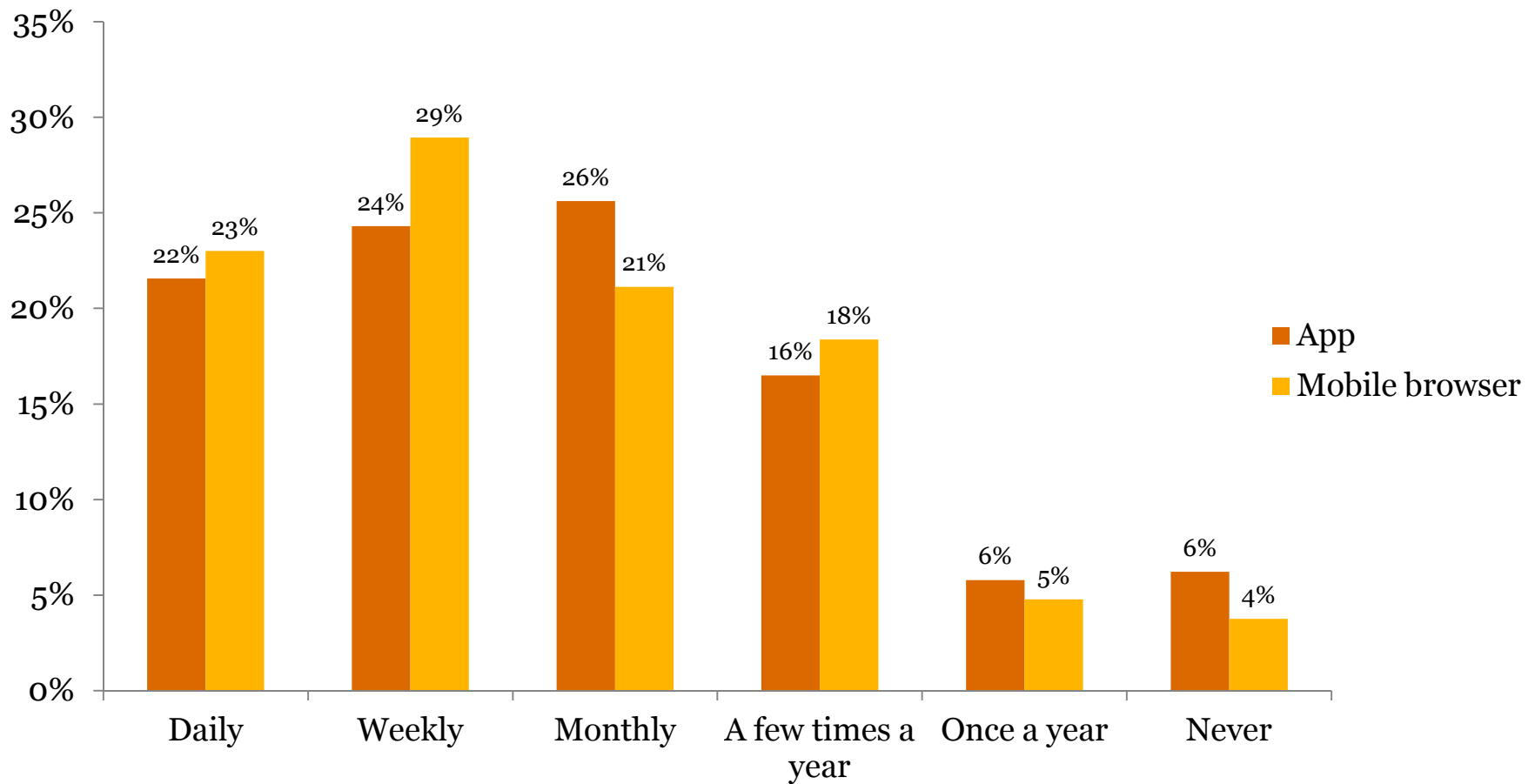
Q16. How often do you use either an app or the mobile browser on your mobile/smartphone for shopping?

Q17. Why do you prefer an app or a mobile browser over the other?

Q18. Which of the following have you done using your mobile/smartphone?

Q19. Why don't you use your mobile/smartphone for shopping?

Q16. How often do you use either an app or the mobile browser on your mobile/smartphone for shopping?

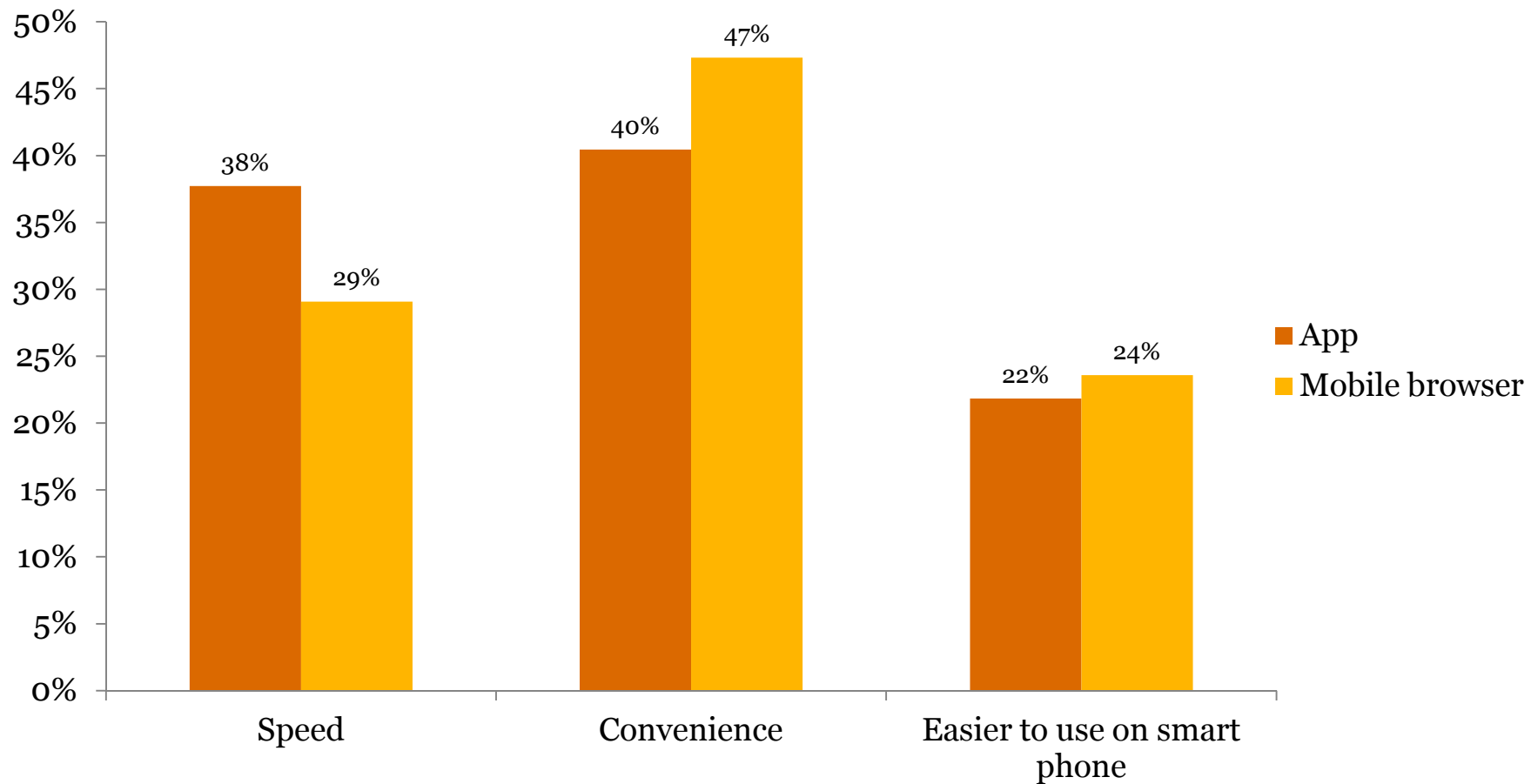


Base: 691

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Q17. Why do you prefer an app or a mobile browser over the other?



Base (App): 623 Base (Mobile Browser): 636

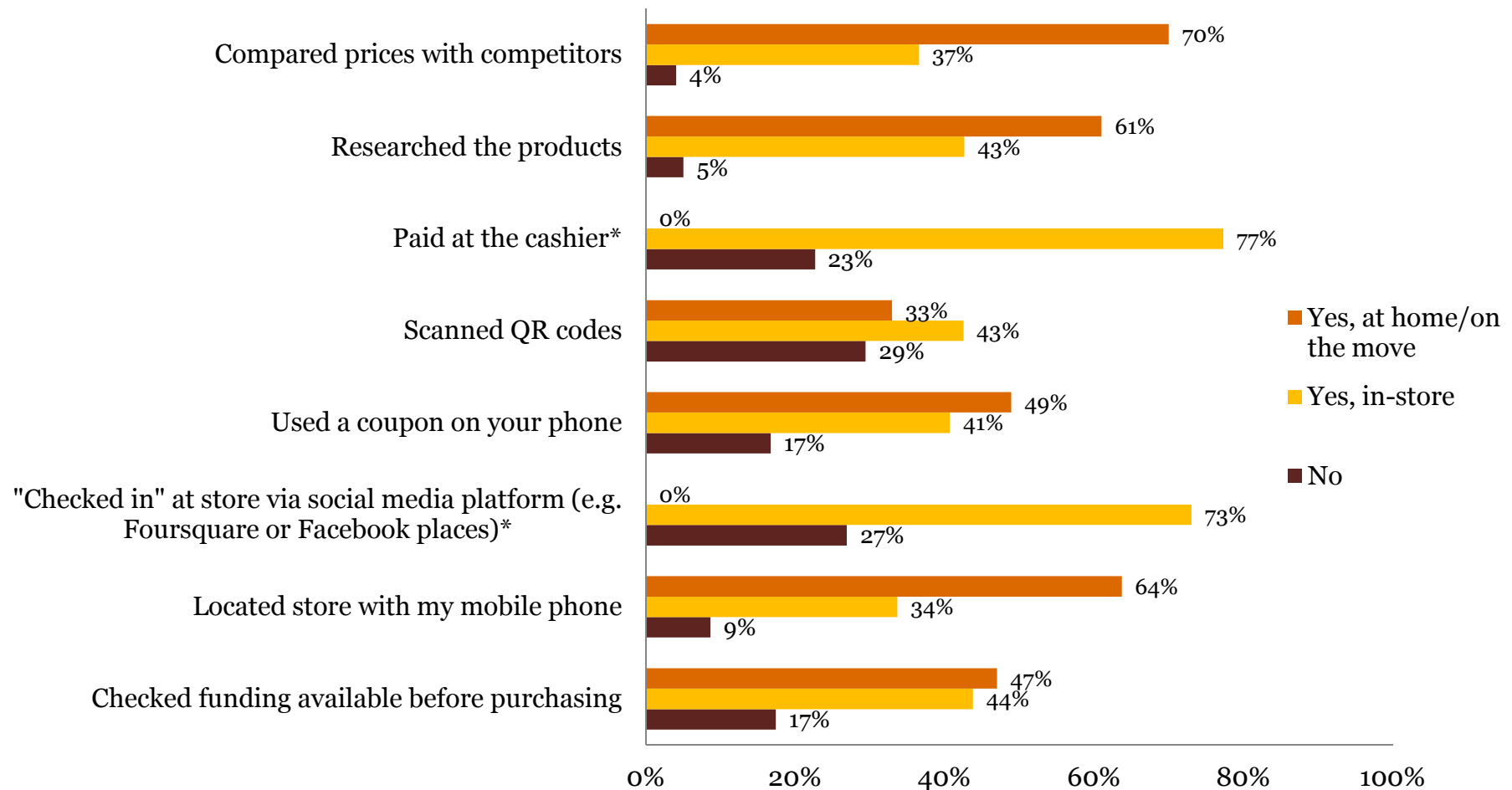
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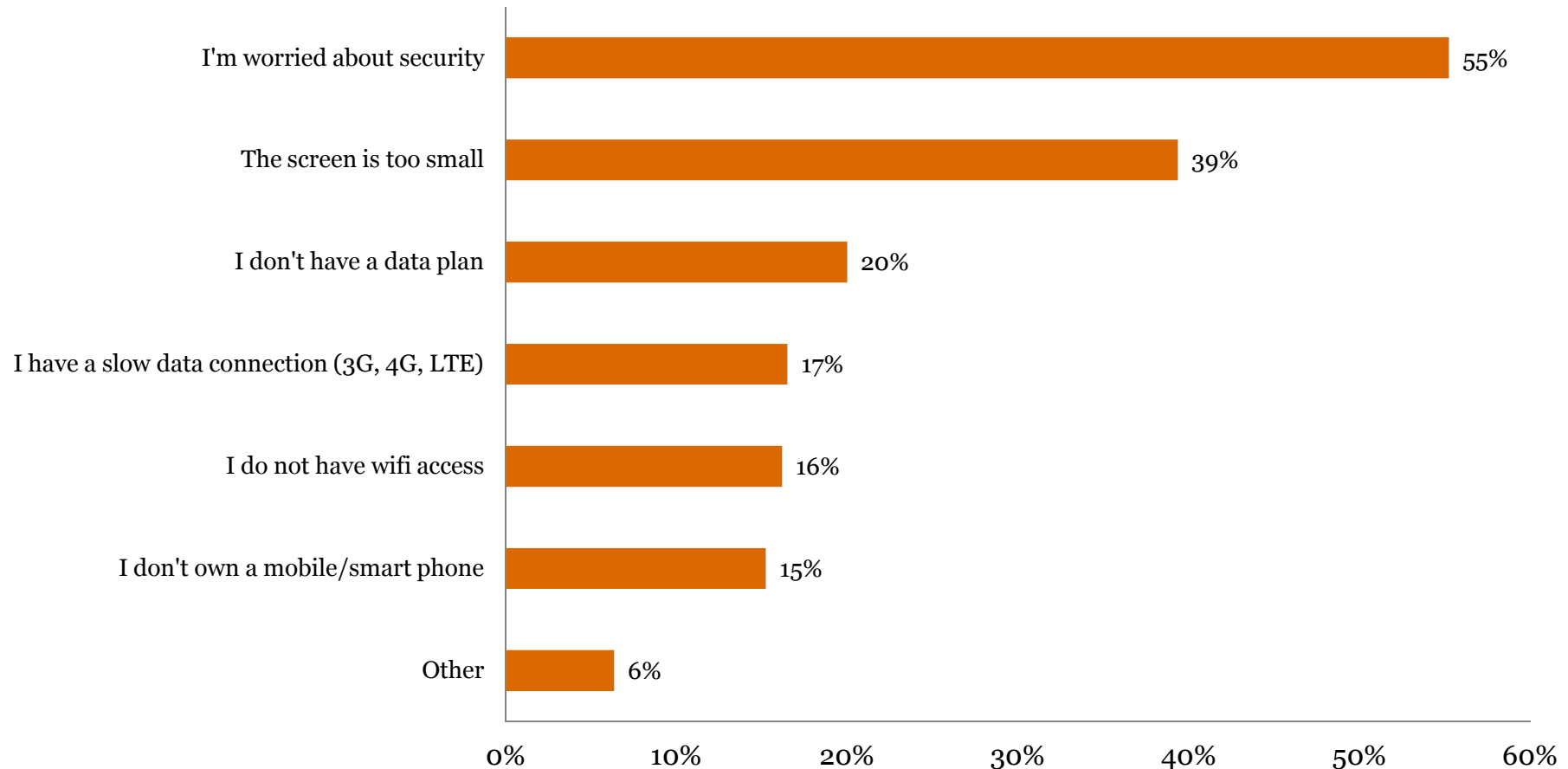
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Q18. Which of the following have you done using your mobile/smartphone?



*For Paid at cashier and "checked in" at store, respondents were not able to select yes at home/on move.

Q19. Why don't you use your mobile/smartphone for shopping?



Section V - Favourite retailers in India

Q20. Have you shopped with any of the following retailers over the last 12 months through any channel (in store, PC, tablet, mobile/smartphone, or social media)?

Q21. Of those you have chosen, please specify if you have purchased something from them in-store and/or online.

Q22. Of those you have chosen, which are your favourite retailers/brands?

Q23. Why do you shop at your top 3 favourite retailers/brands?

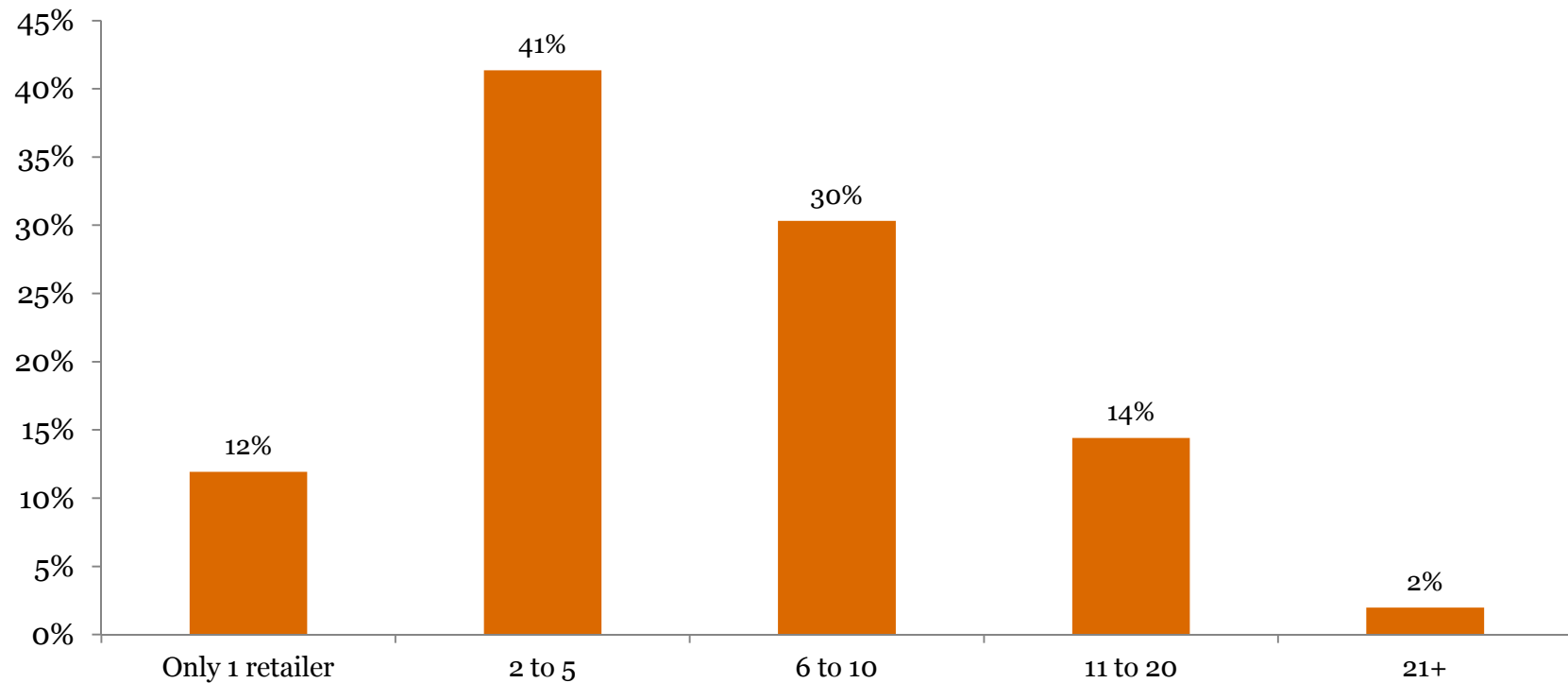
Q24. What would you do if your favourite retailer closed down your local store?

Q25. Please state which online only retailers you have shopped with over the last 12 months, indicating if you have made purchases from your PC, from a tablet, from a mobile/smartphone or via a social media platform.

Q26. Today, companies are increasingly offering products directly to consumers, bypassing retailers. If you do shop from brand websites, why do you buy directly from the brand's website?

Q27. In each of these product categories, please indicate if you have bought directly from a brand online.

Q20. Number of retailers shopped with over the last 12 months



Note: Information calculated from specified list of India retailers. Please note options excluded online only retailers.

Base: 1006

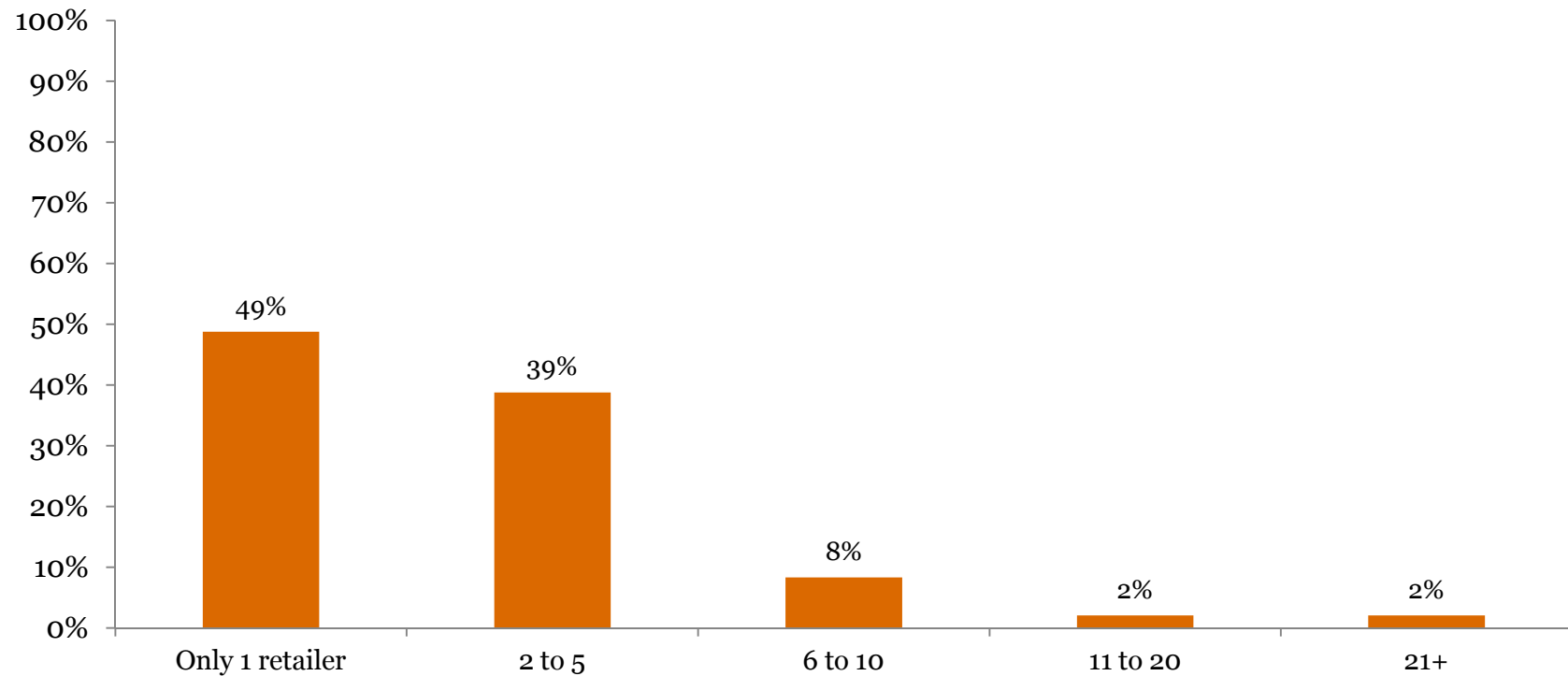
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Q21a. Number of retailers used by multichannel shoppers



Note: We have defined a multichannel shopper as someone who purchases from at least two of the following channels; physical store; online via tablet /PC or via mobile/smartphone.

Base: 240

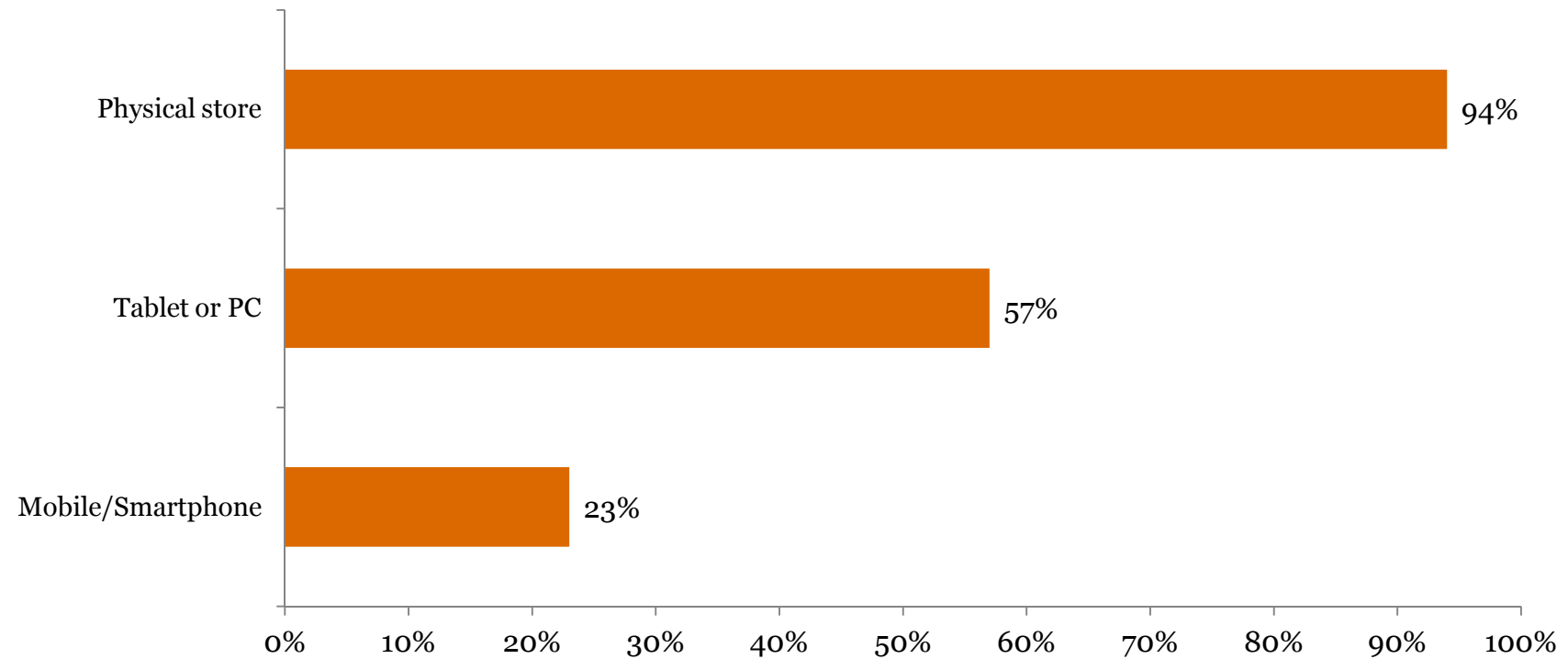
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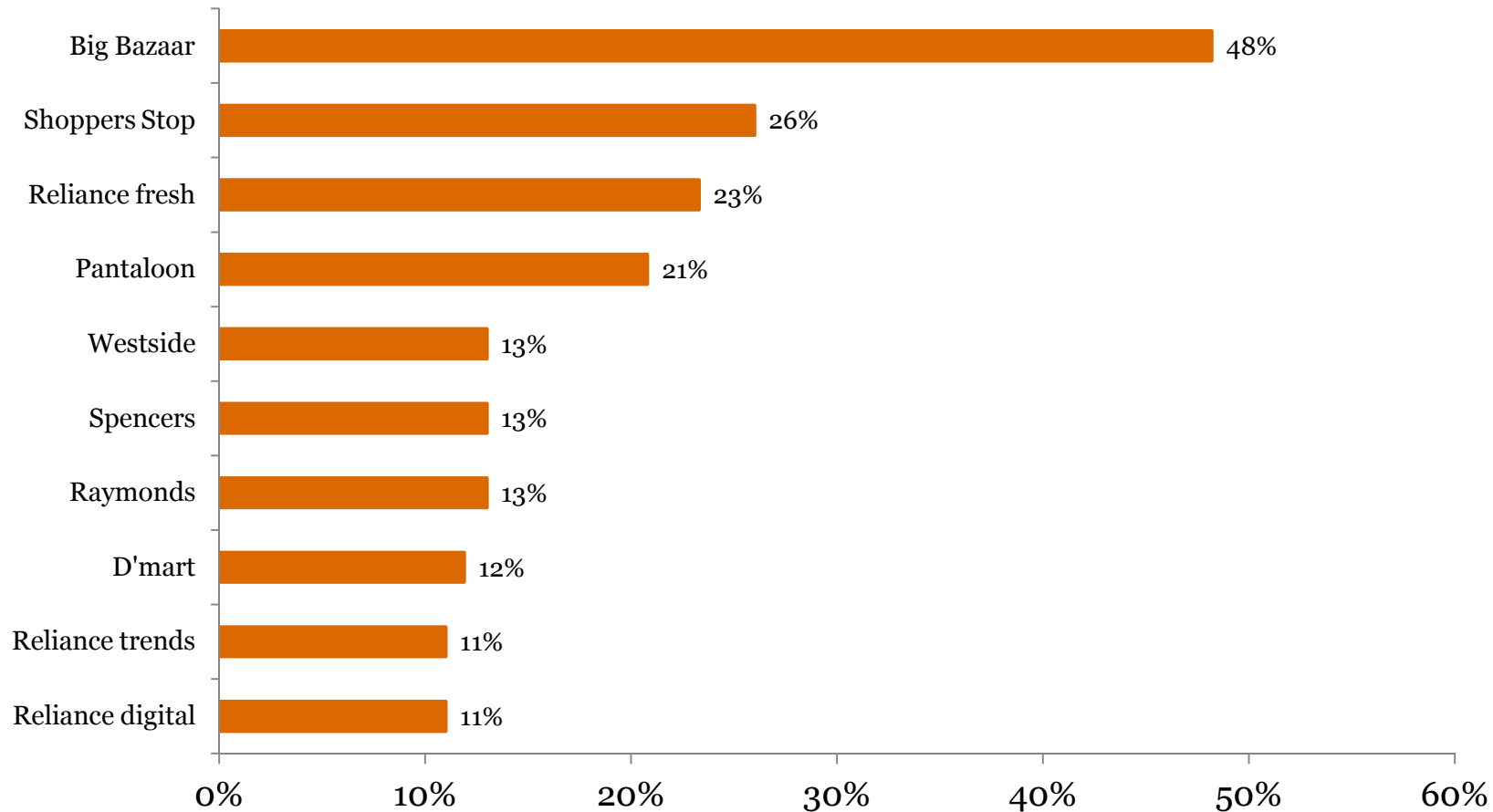
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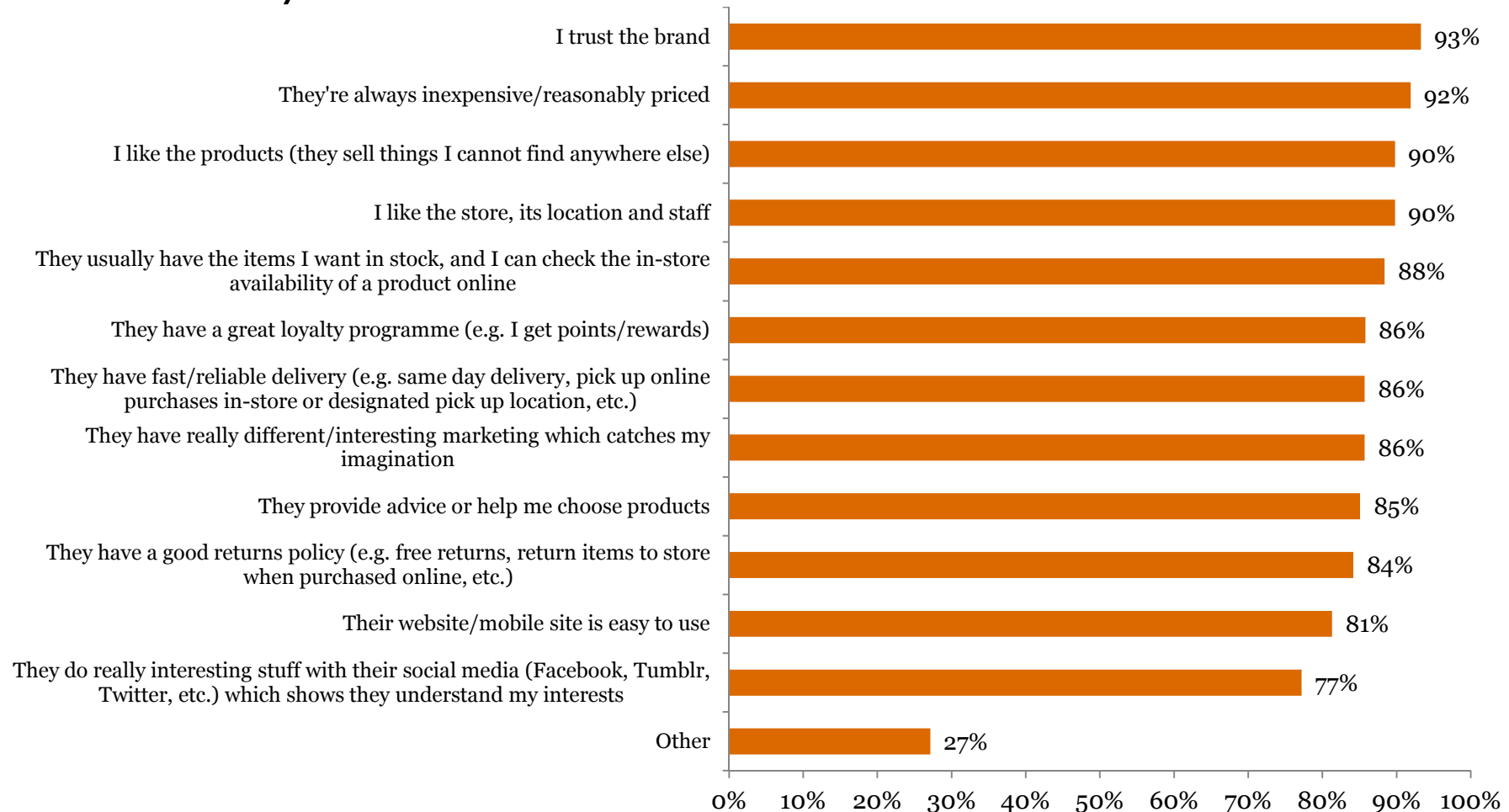
Q21b. Frequency of channels used for retailers selected



Q22. Of those you have chosen, which are your favourite retailers/brands? (top 10 mentioned)



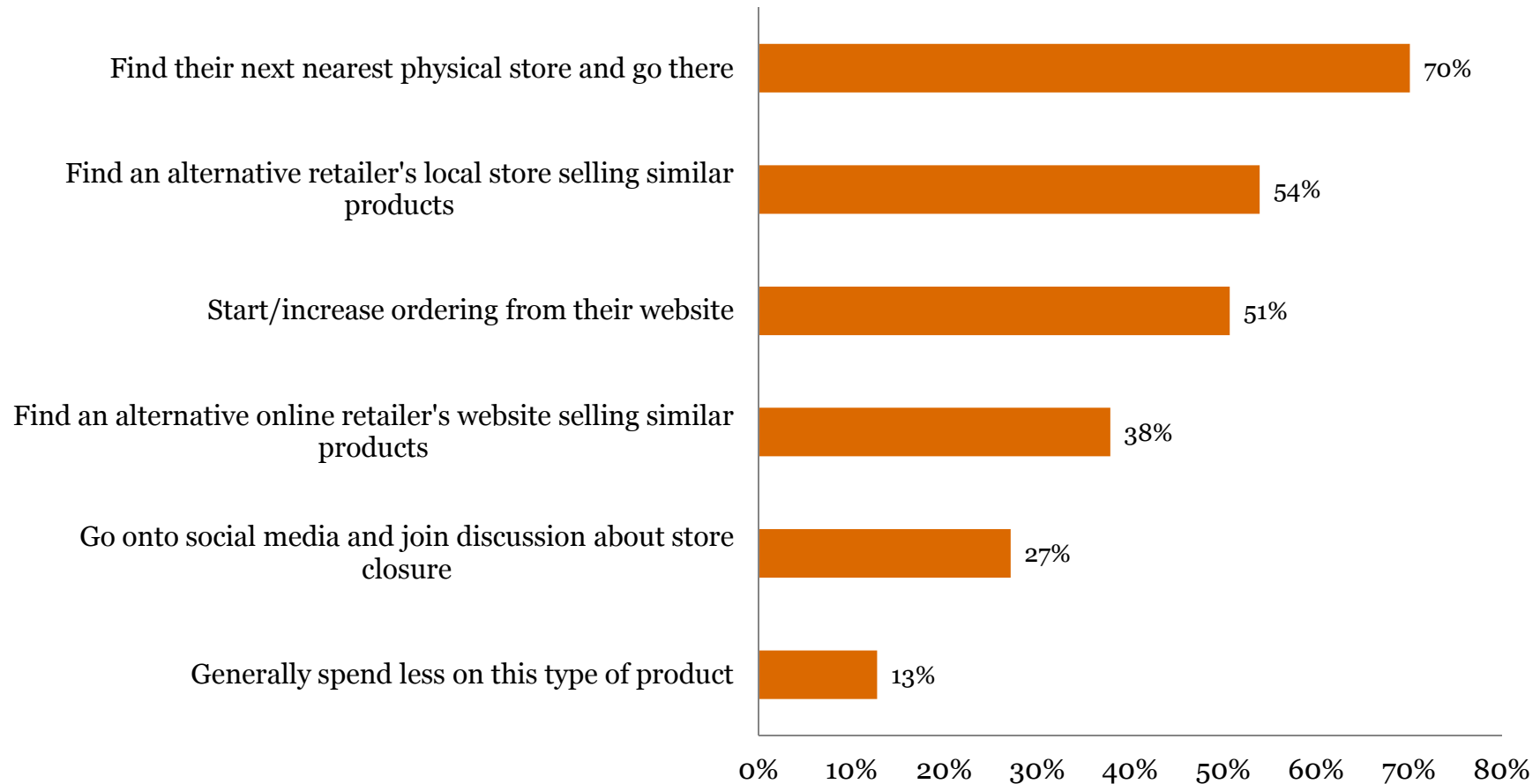
Q23. Why do you shop at your top three favourite retailers/brands?



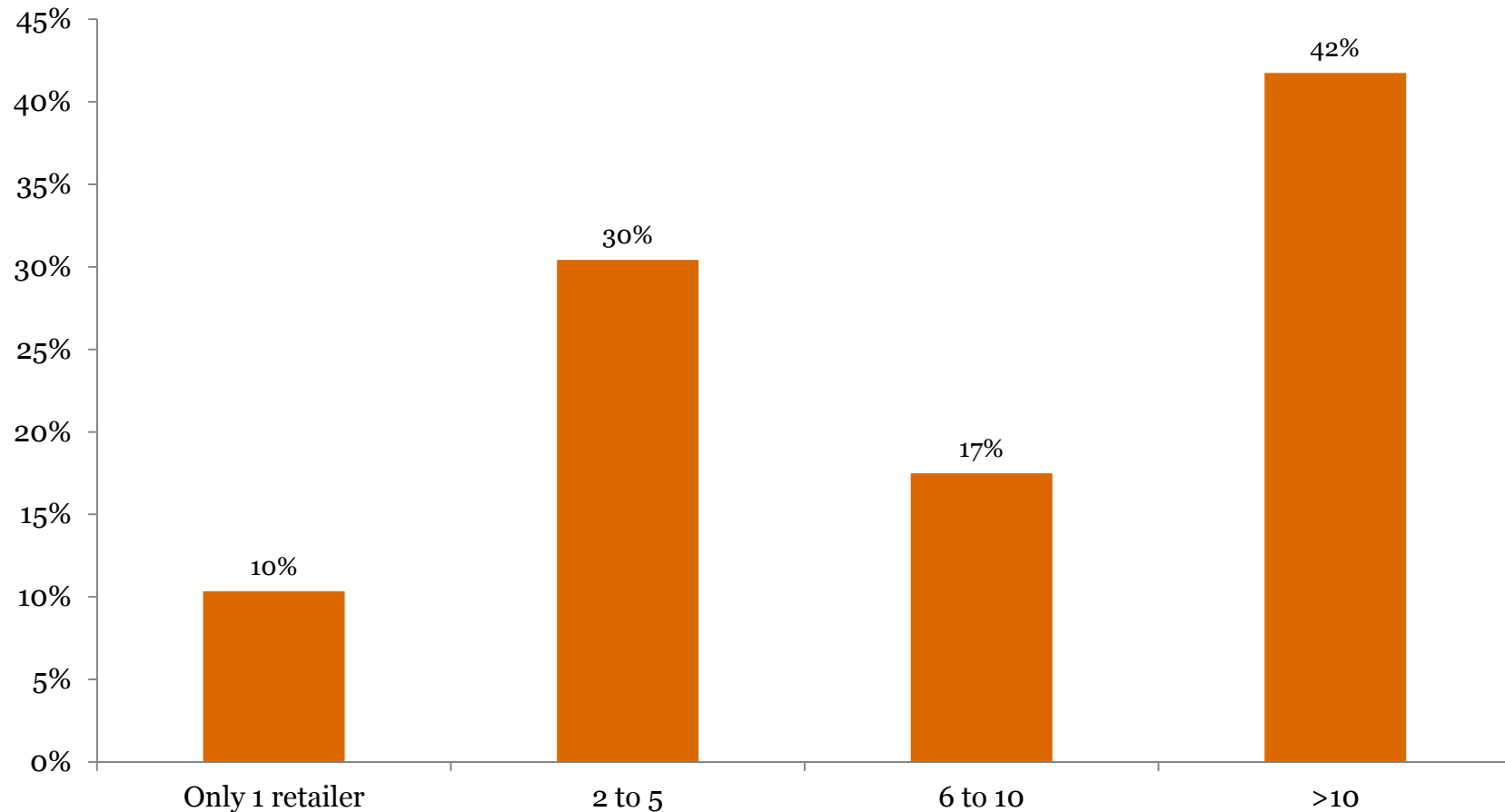
Base: 998 Total responses selected for up to three retailers.
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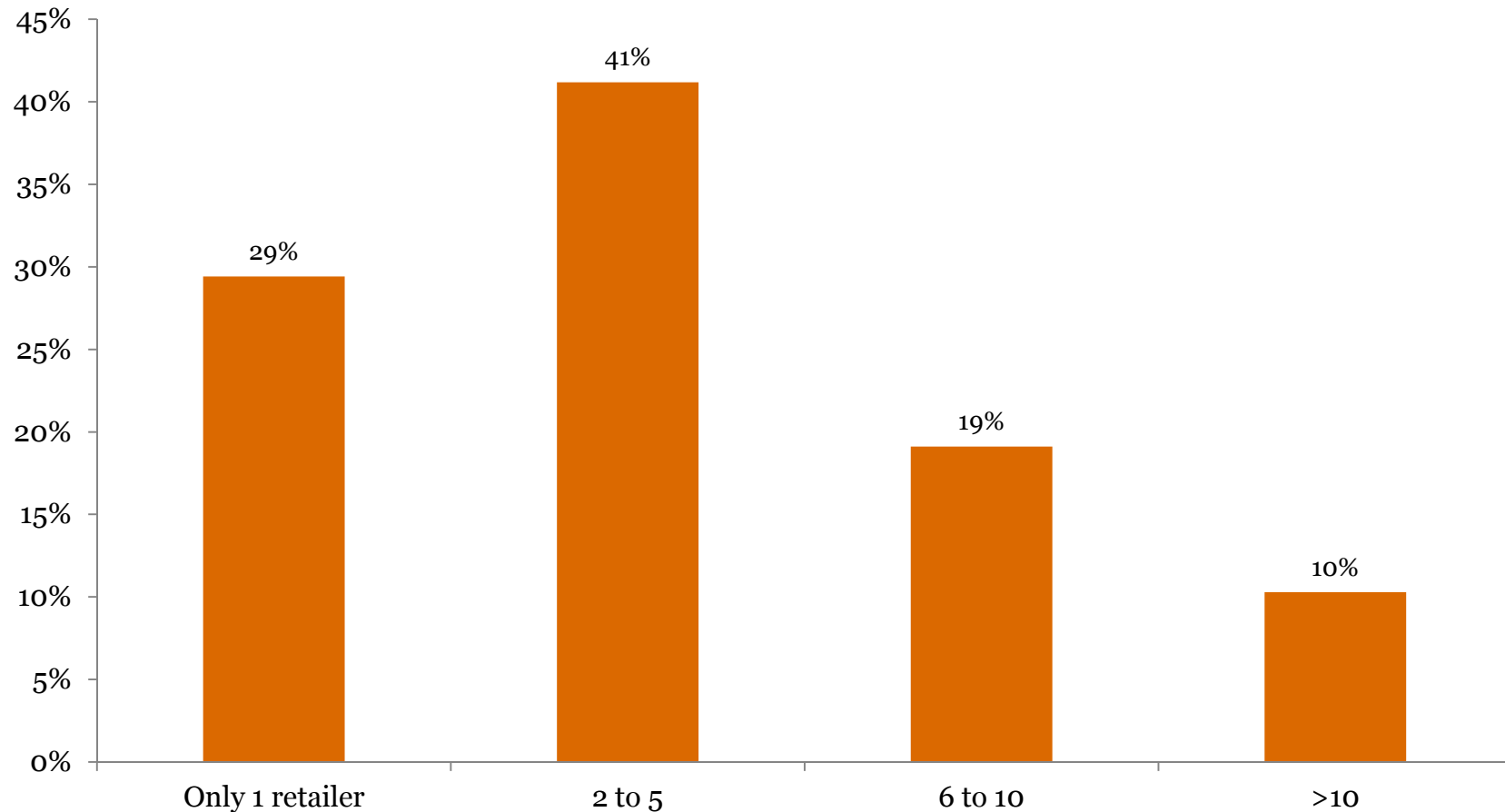
Q24. What would you do if your favourite retailer closed down your local store?



Q25a. Number of online only retailers shopped with over the last 12 months



Q25b. Respondents who use multiple digital platforms – number of online only retailers shopped with



Note: respondents could select whether they purchased from online retailers via PC, Tablet, mobile/smartphone or social media platform.

Base: 340

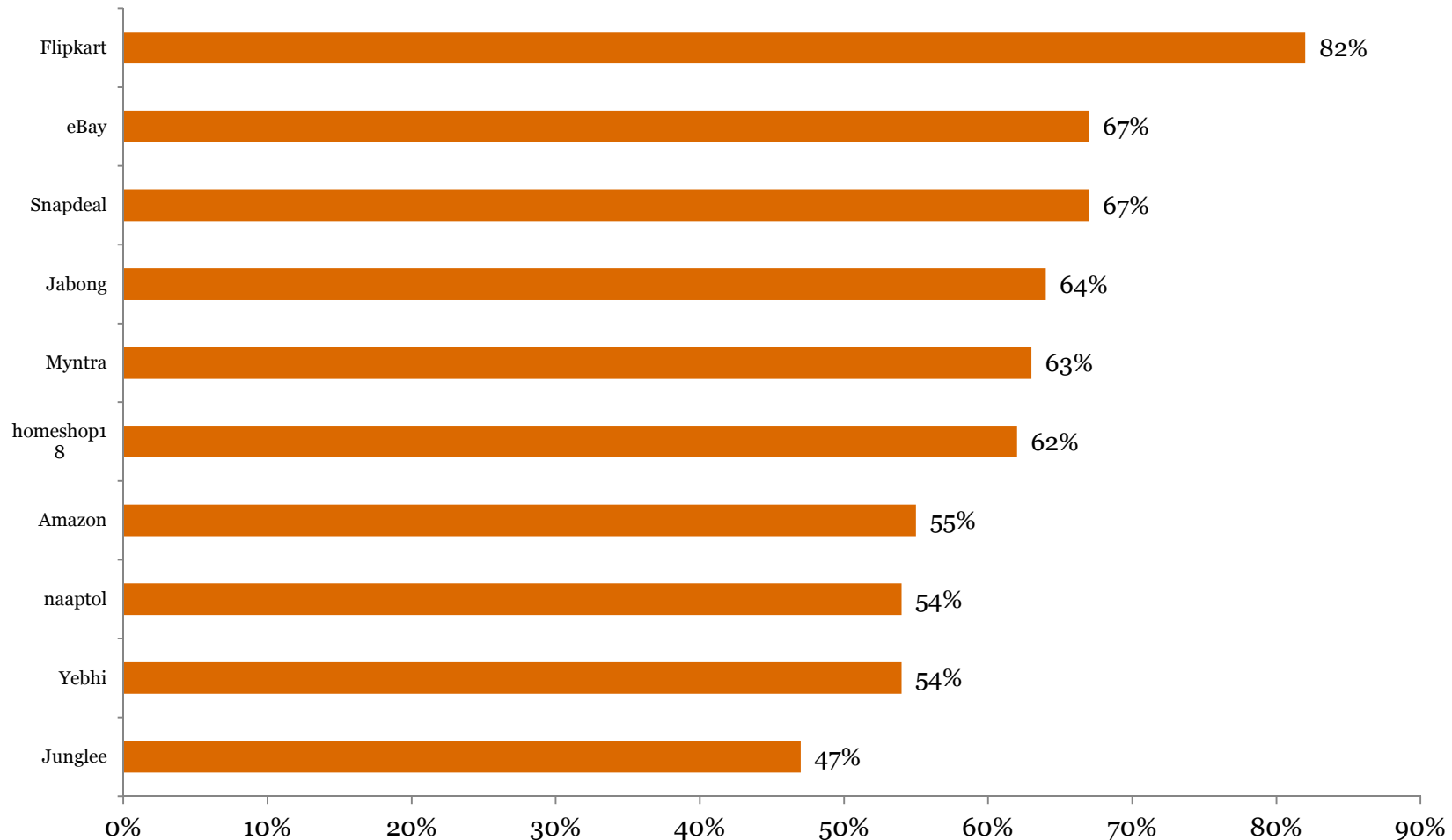
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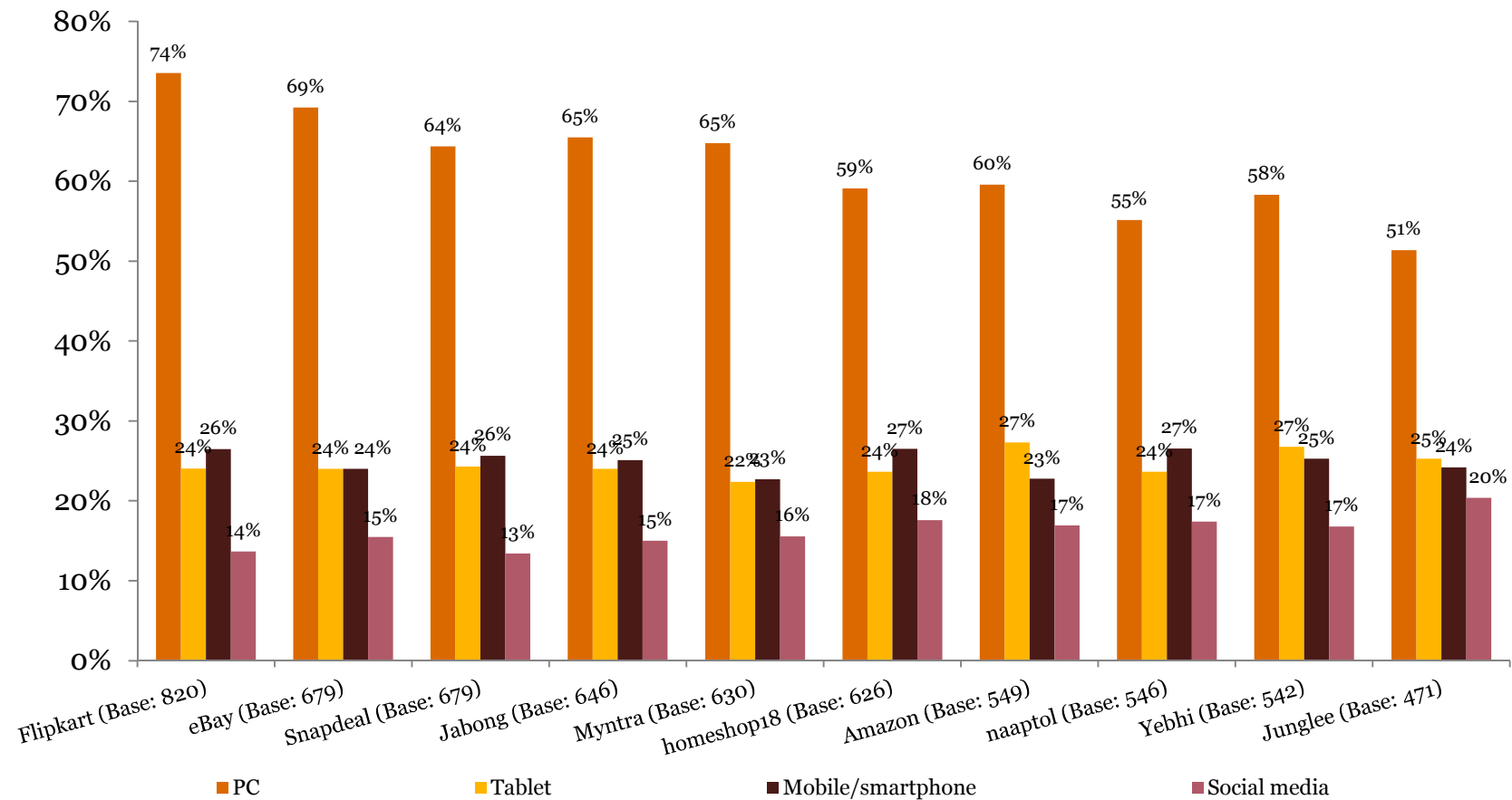
Q25c. Top 10 online only retailers you have shopped with over the last 12 months (top 10 mentioned)



Base: 1006
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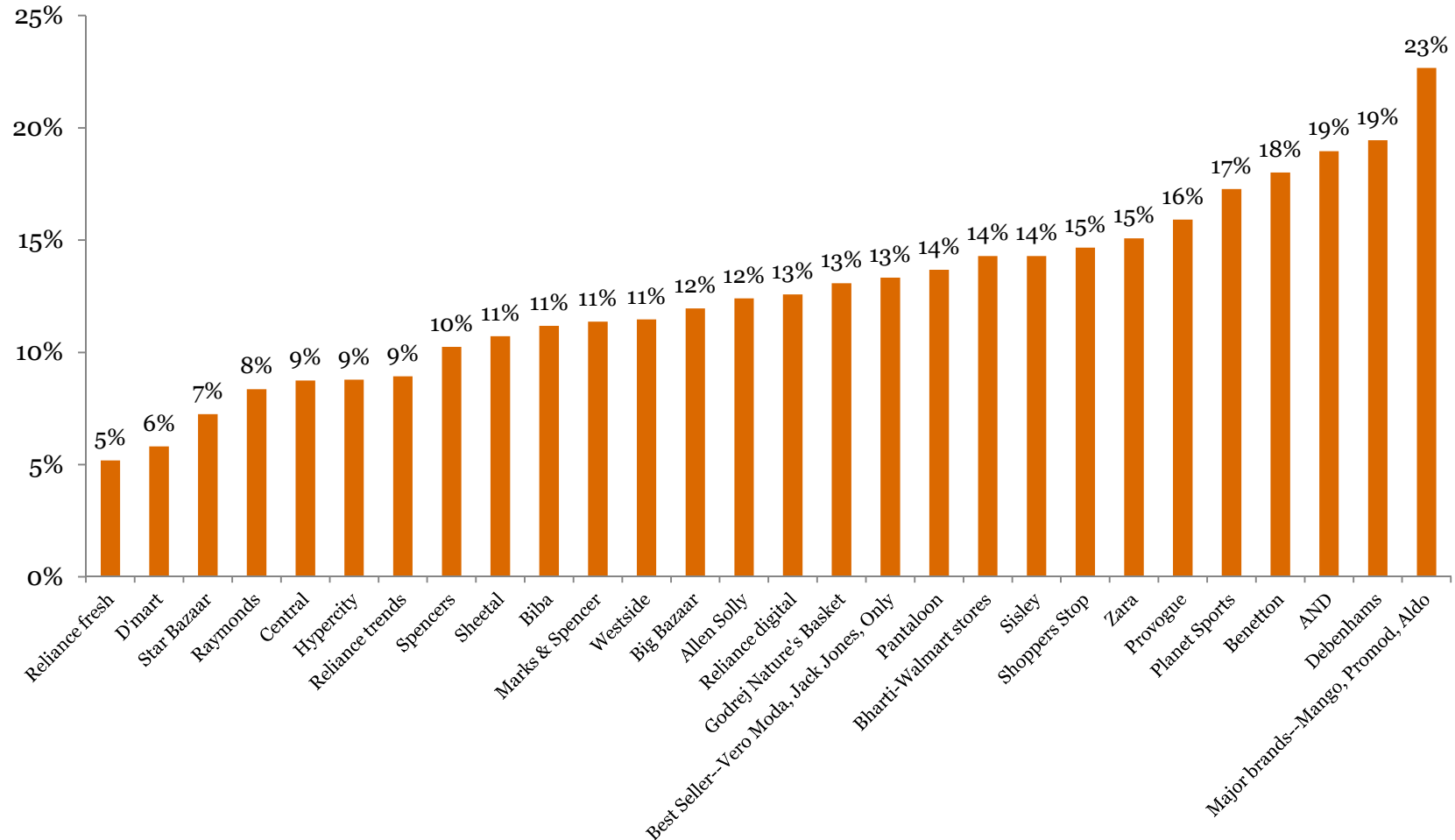
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Q25d. Top 10 online only retailers you have shopped with over the last 12 months, indicating from where you have made purchases (top 10 mentioned) – India



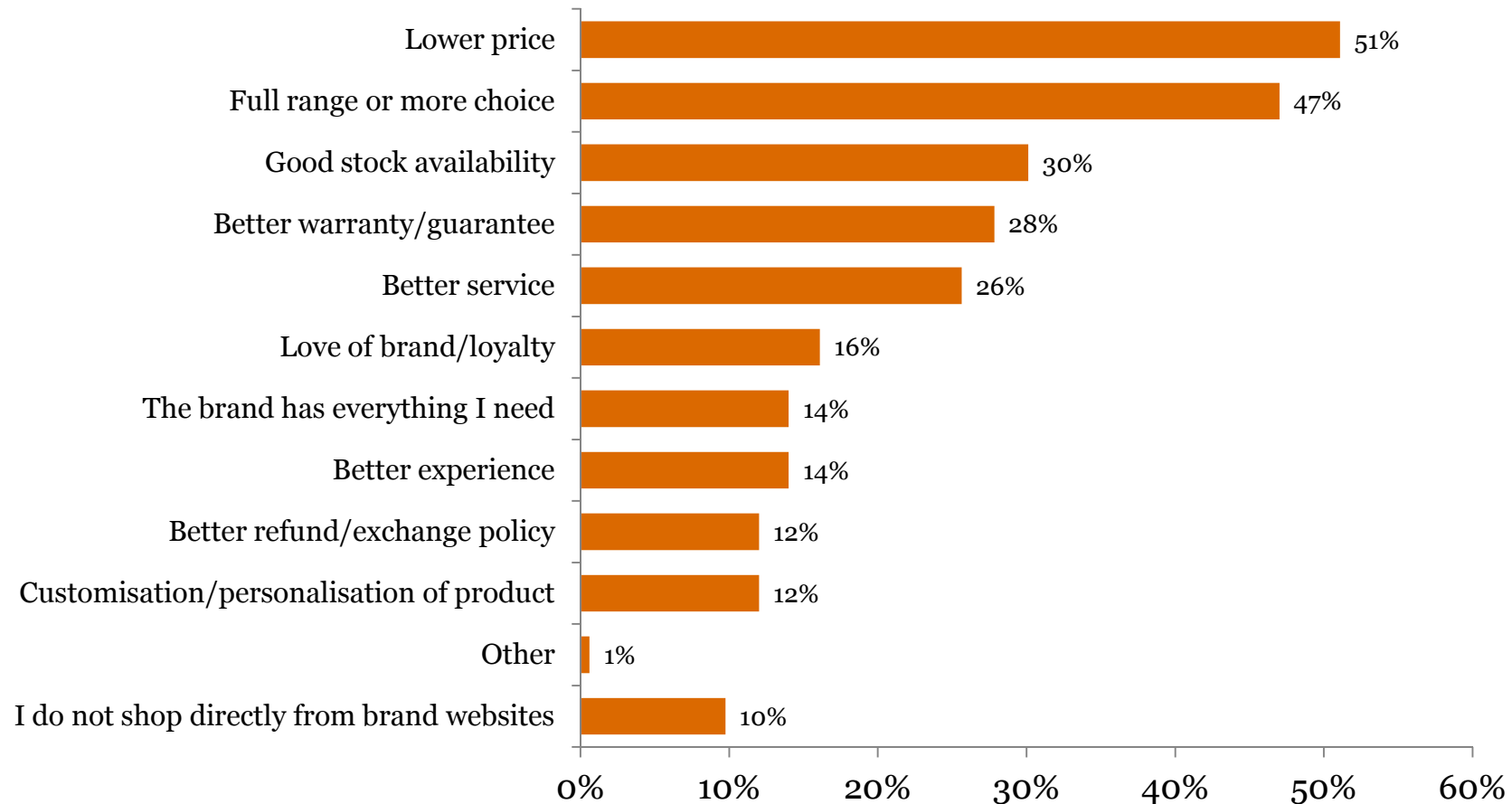
Note: Multi-response question
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Multichannel Ratio - India

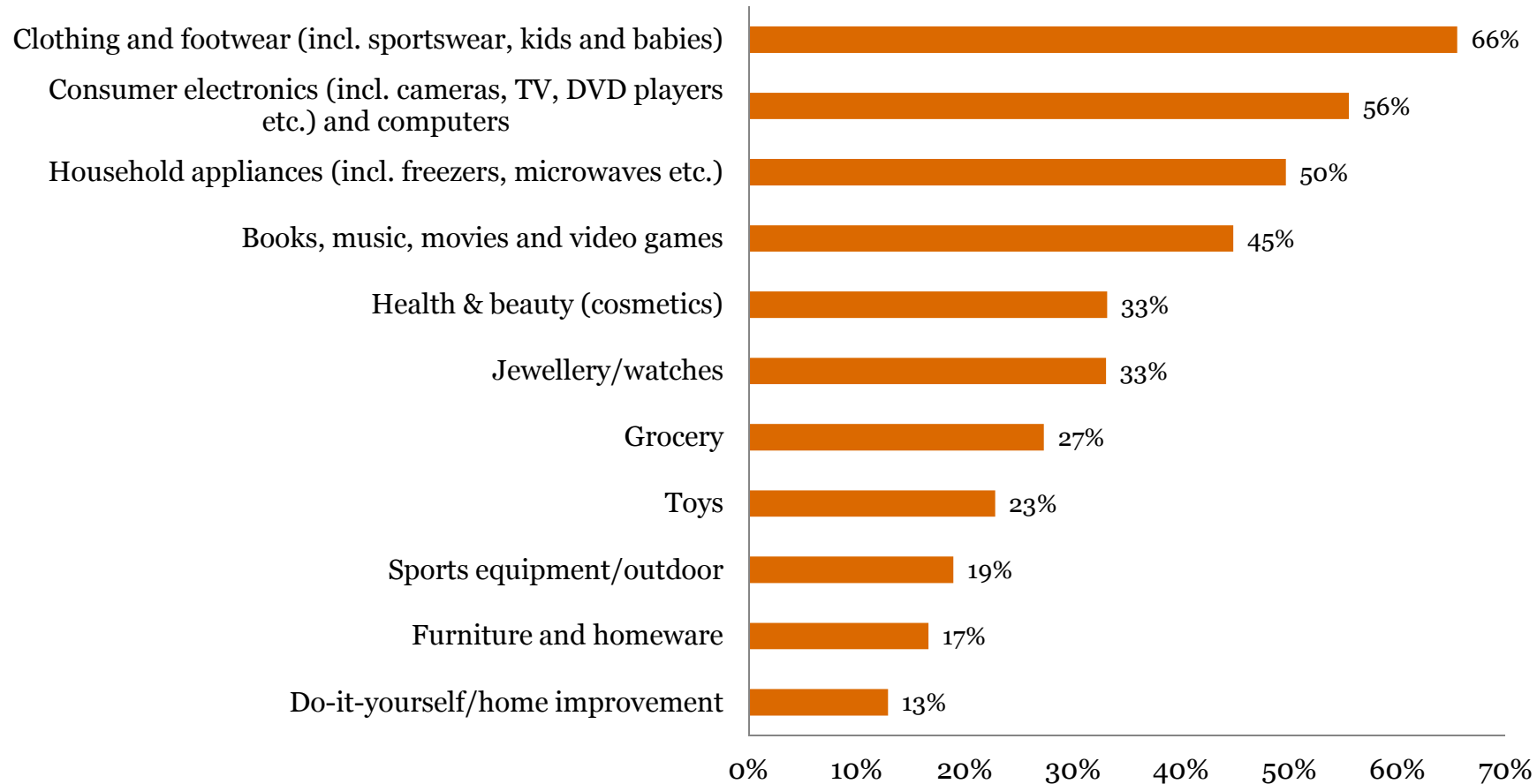


Note: For each retailer, the multichannel ratio is the number of shoppers who have made purchases from more than one channel divided by the total number of shoppers.

Q26. If you do shop from brand websites, why do you buy directly from the brand's website?



Q27. In each of these product categories, please indicate if you have bought directly from the brand online



Section VI - The purchase journey

Q28. For each of the following product categories, how many of your purchases have you made online over the last 12 months?

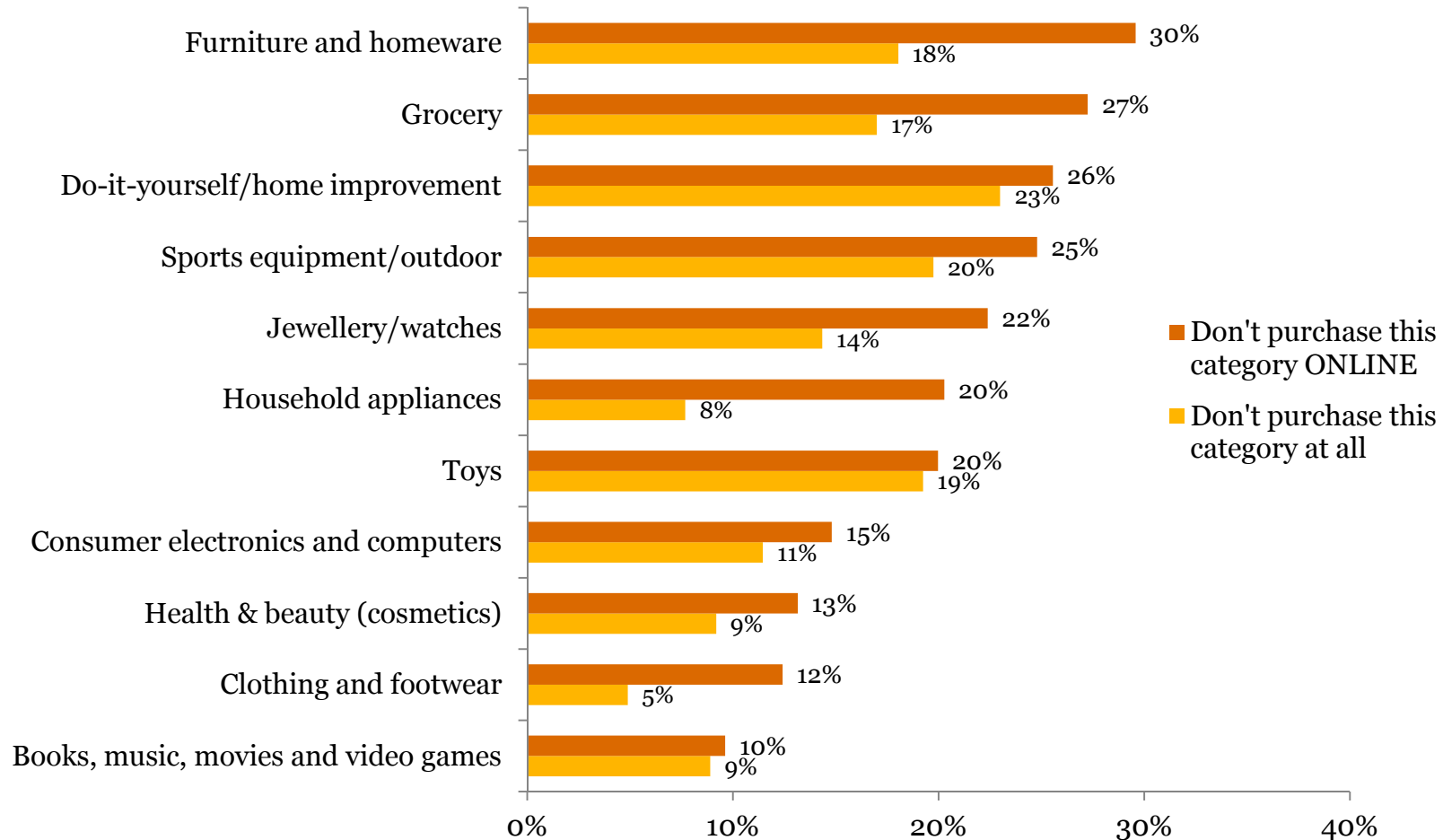
Q29. Which method do you most prefer for RESEARCHING your purchases?
Please select only one option per category.

Q30. Which method would you most prefer for BUYING your purchases? Please select only one option per category.

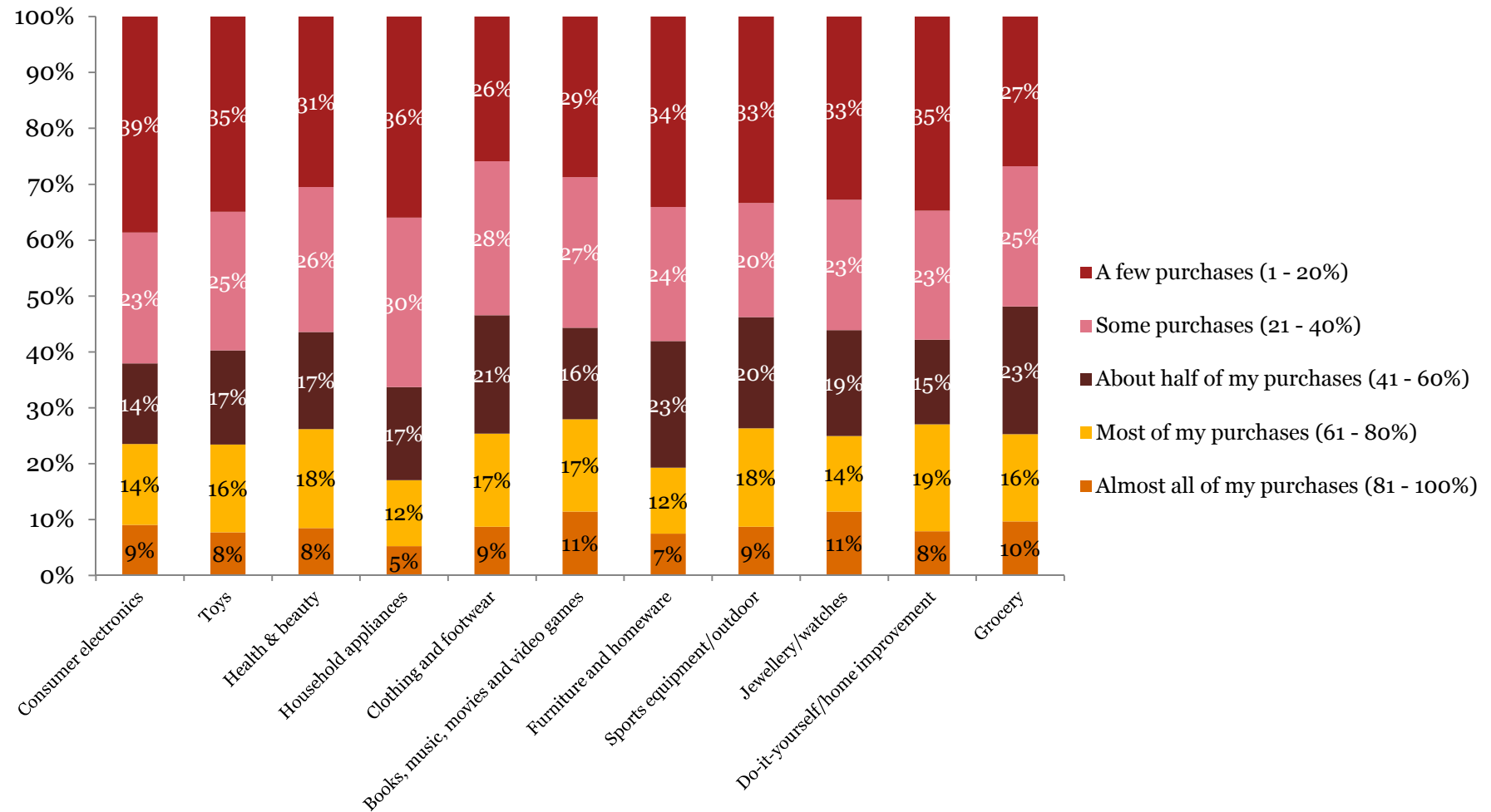
Q31. Which are the most important delivery options for you when making a purchase online?

Q32. Which are the most important return options for you when making a purchase online?

Q28a. Those who have not purchased online/at all over the last 12 months for each of the product categories.

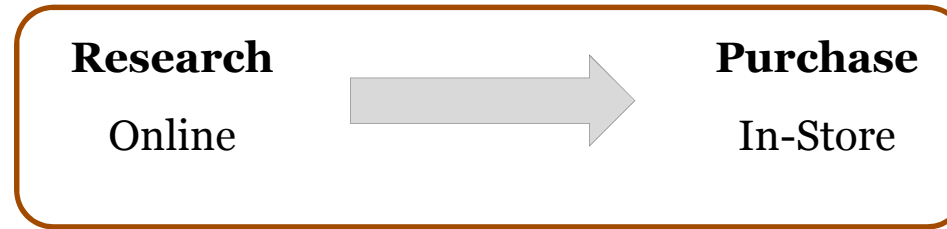
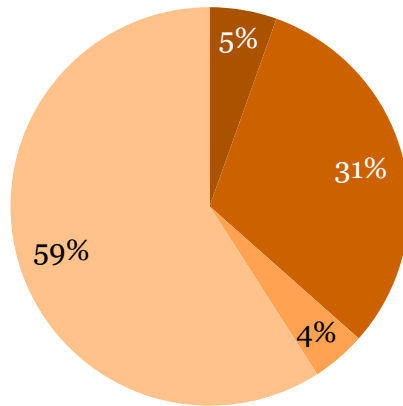


Q28b. For each of the following product categories, how many of your purchases have you made online over the last 12 months?

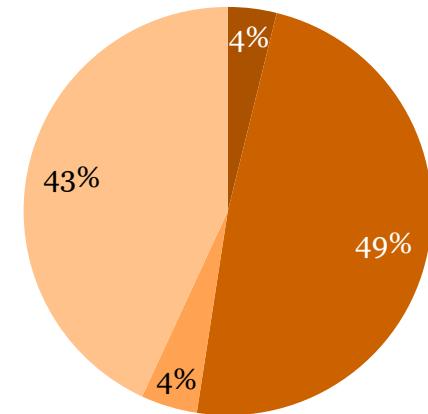


Consumer electronics and computers

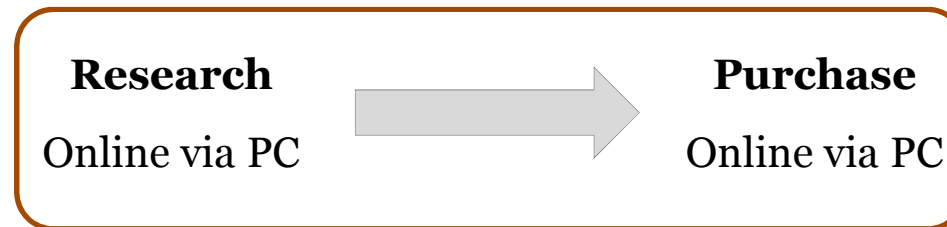
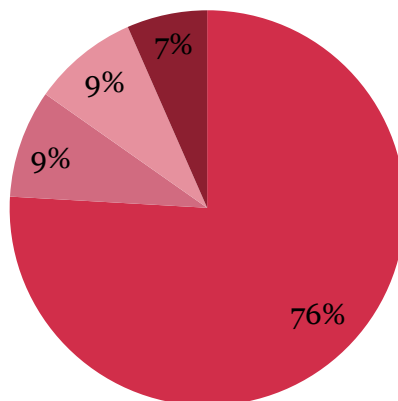
Preferred purchase journey



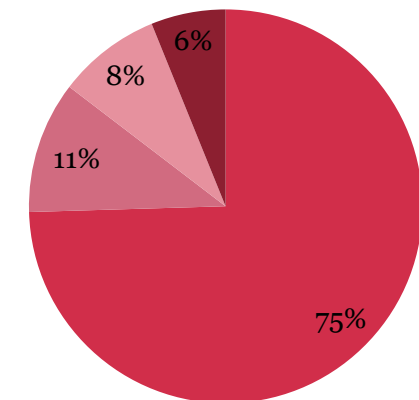
■ Catalogue/magazine ■ In-Store
■ TV Shopping ■ Online



Online channels separated



■ Online via PC ■ Online via tablet
■ Online via mobile/smartphone ■ Online via social media platform

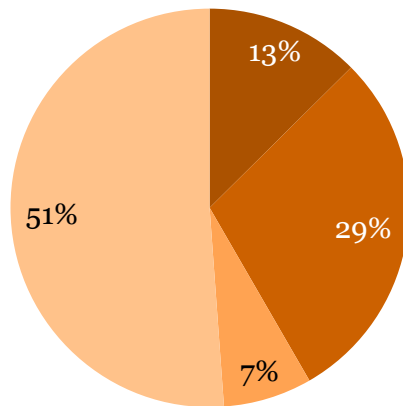


Note: % totals may range from 99 to 101 due to rounding.
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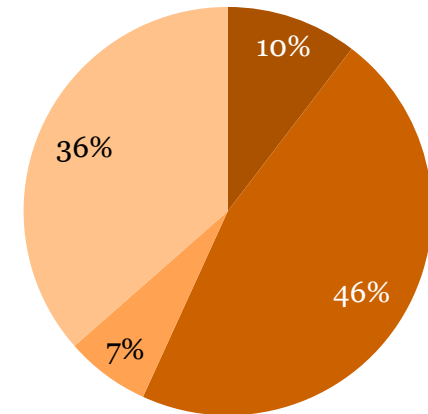
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Household appliances

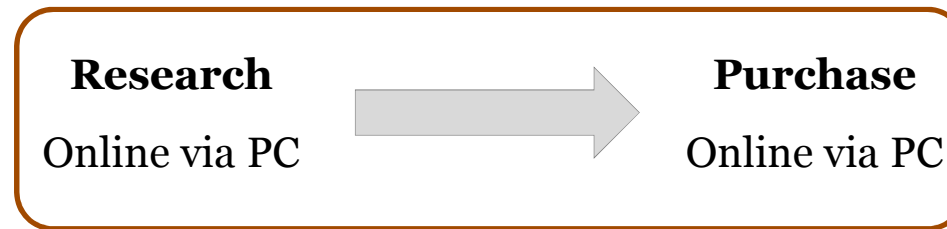
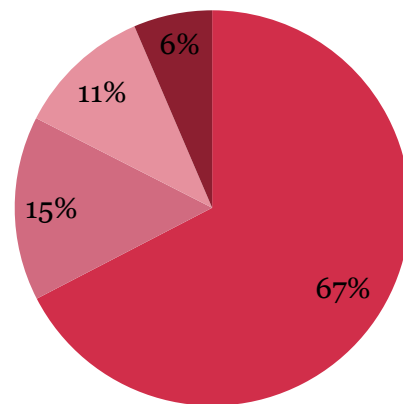
Preferred purchase journey



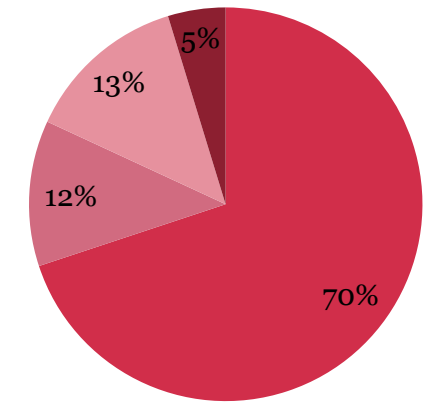
■ Catalogue/magazine ■ In-Store
■ TV Shopping ■ Online



Online channels separated



■ Online via PC ■ Online via tablet
■ Online via mobile/smartphone ■ Online via social media platform

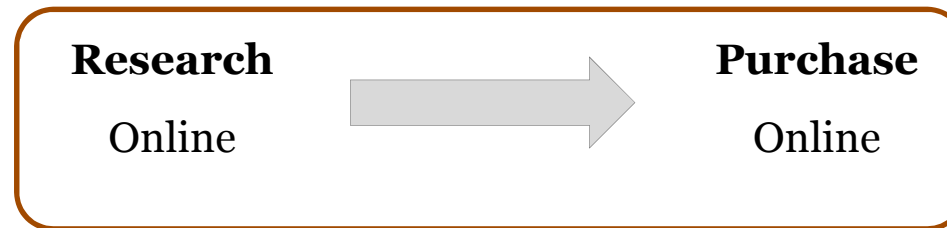
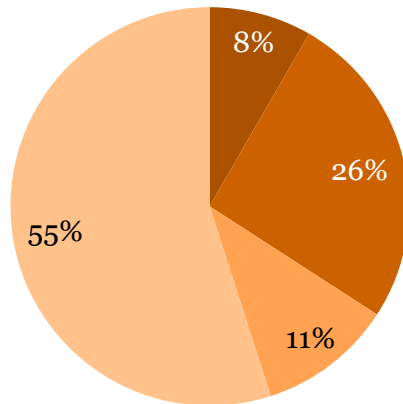


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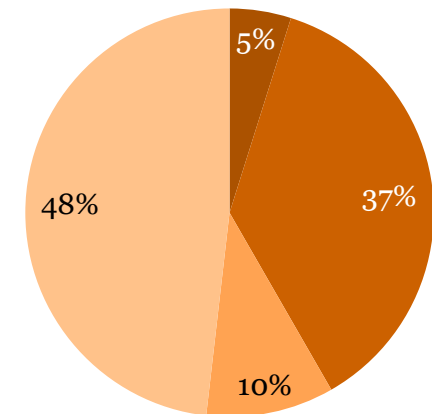
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Clothing and footwear

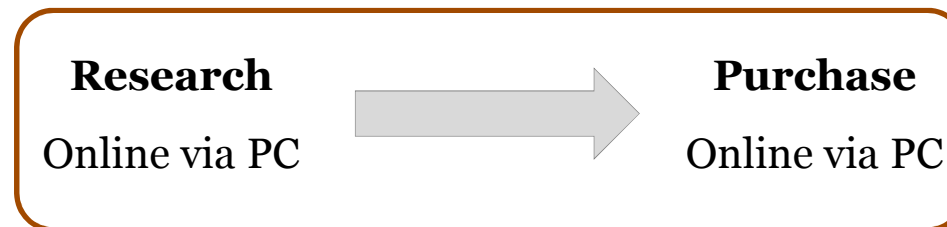
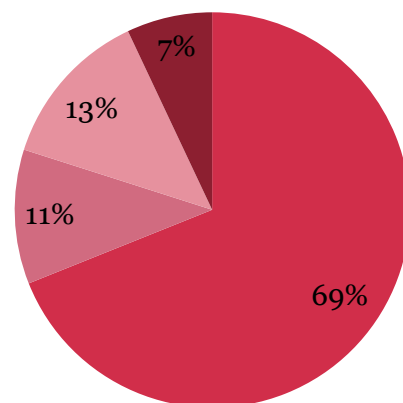
Preferred purchase journey



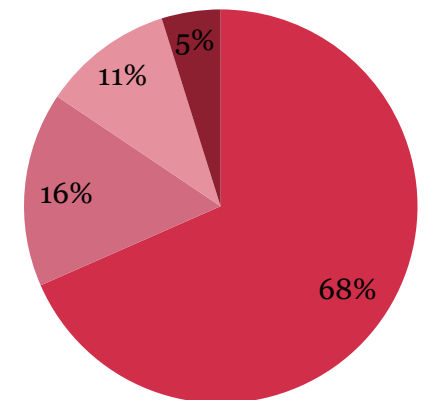
■ Catalogue/magazine ■ In-Store
■ TV Shopping ■ Online



Online channels separated



■ Online via PC ■ Online via tablet
■ Online via mobile/smartphone ■ Online via social media platform

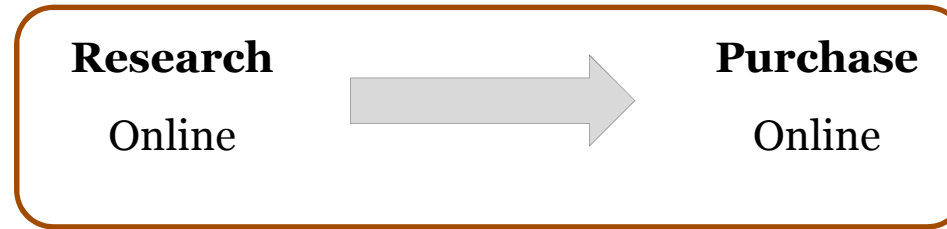
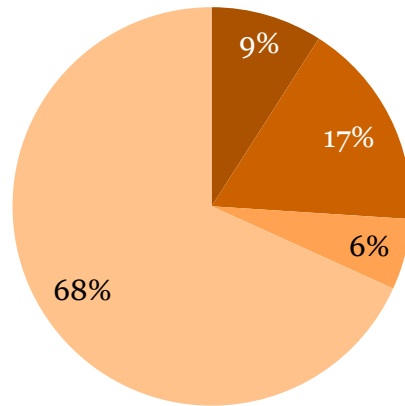


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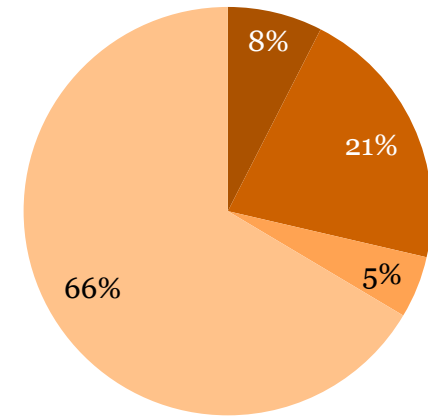
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Books, music, movies and video games

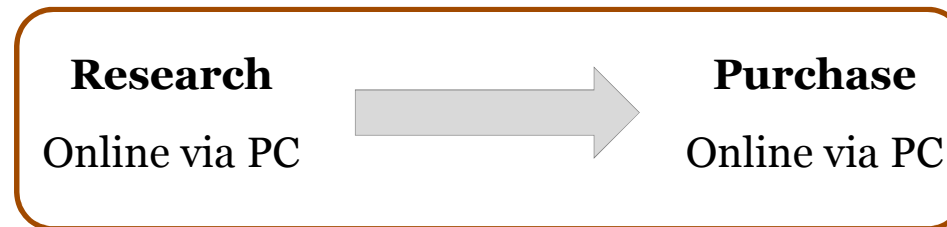
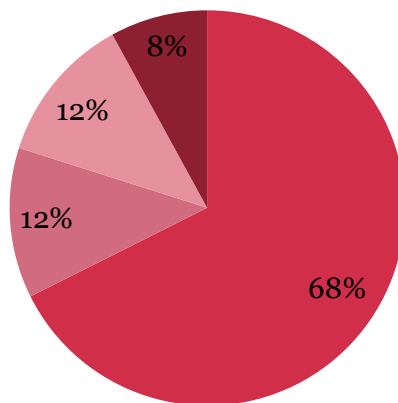
Preferred purchase journey



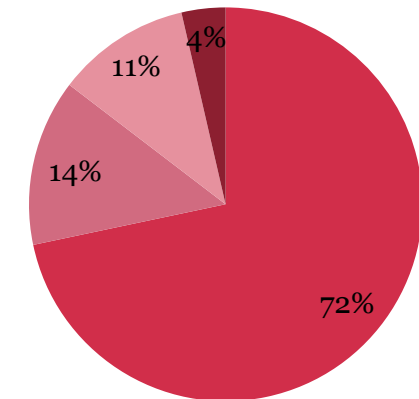
■ Catalogue/magazine ■ In-Store
■ TV Shopping ■ Online



Online channels separated



■ Online via PC ■ Online via tablet
■ Online via mobile/smartphone ■ Online via social media platform

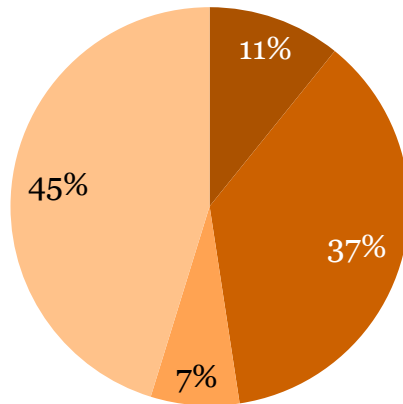


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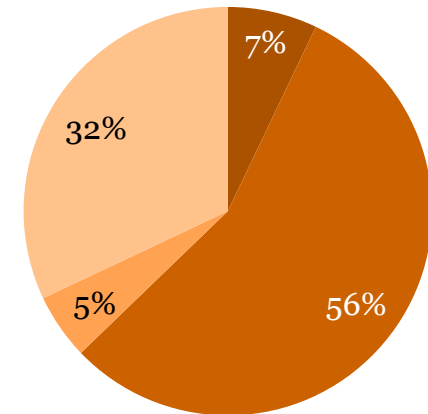
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Furniture and homeware

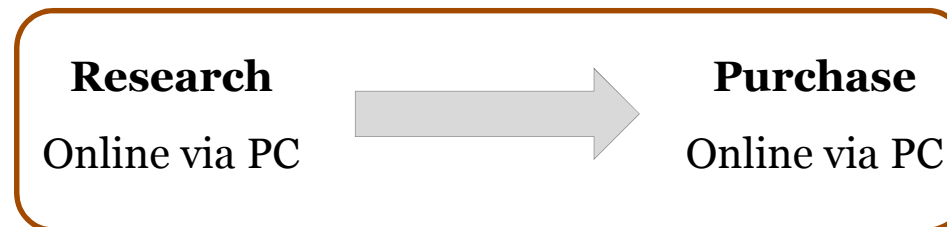
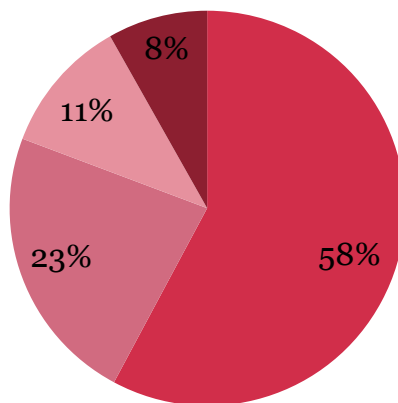
Preferred purchase journey



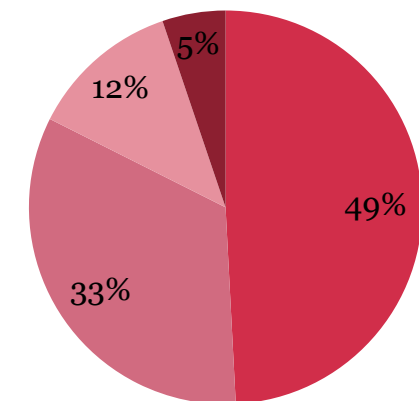
■ Catalogue/magazine ■ In-Store
■ TV Shopping ■ Online



Online channels separated



■ Online via PC ■ Online via tablet
■ Online via mobile/smartphone ■ Online via social media platform

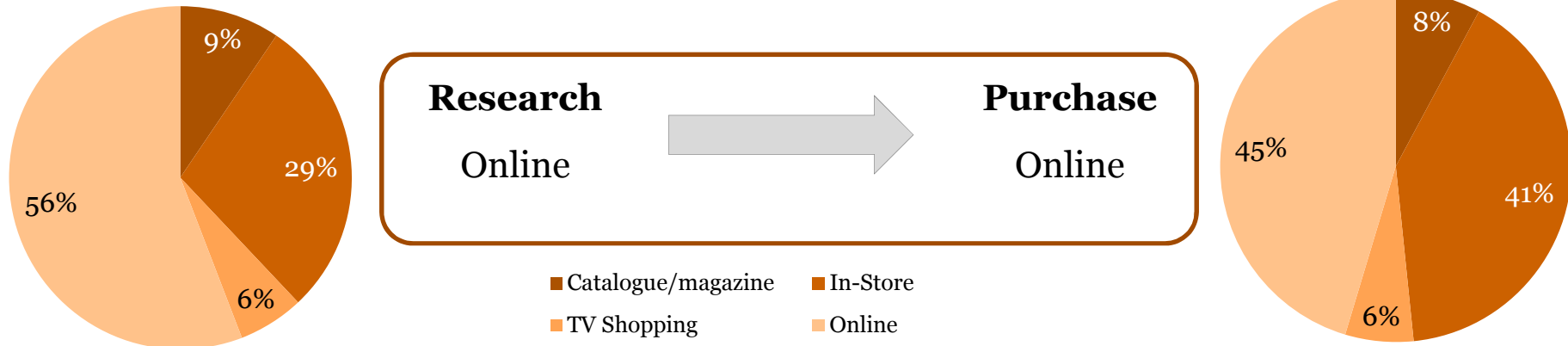


Note: % totals may range from 99 to 101 due to rounding.
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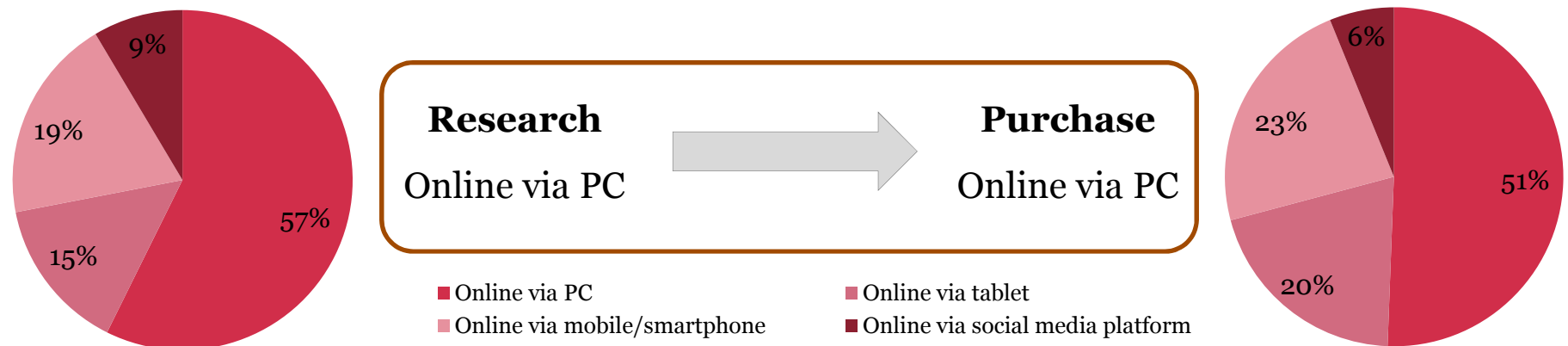
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Sports equipment/outdoor

Preferred purchase journey



Online channels separated

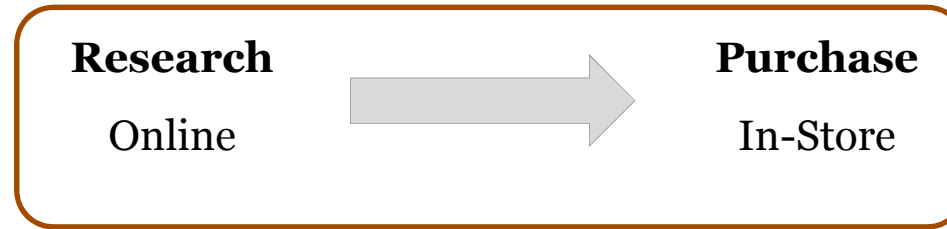
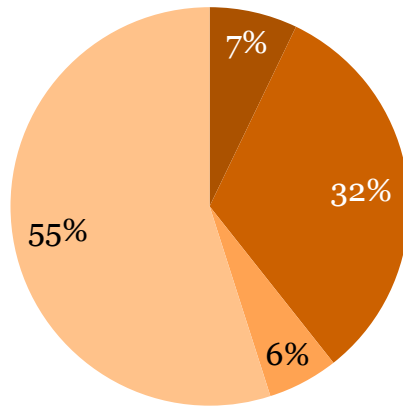


Note: % totals may range from 99 to 101 due to rounding.
Global Multichannel Survey 2013
PwC

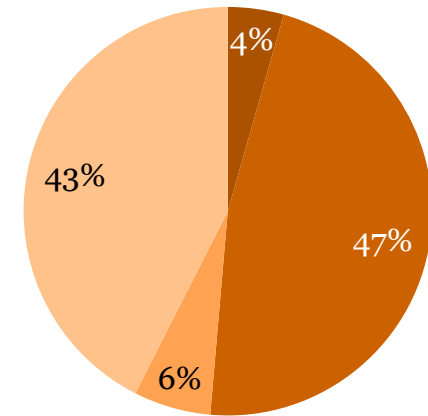
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Jewellery/watches

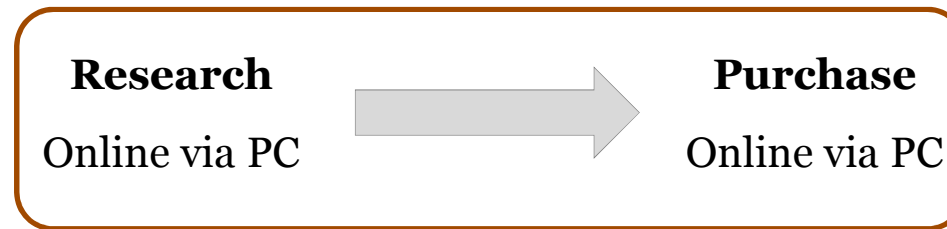
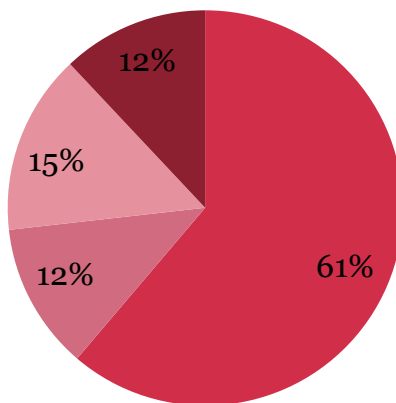
Preferred purchase journey



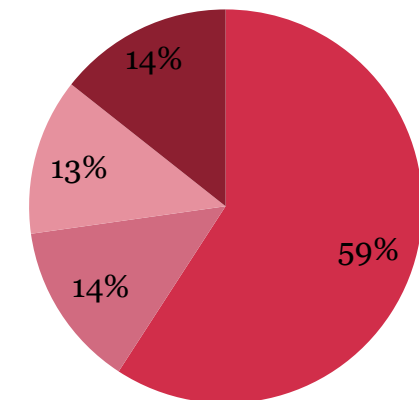
■ Catalogue/magazine ■ In-Store
■ TV Shopping ■ Online



Online channels separated



■ Online via PC ■ Online via tablet
■ Online via mobile/smartphone ■ Online via social media platform



Note: % totals may range from 99 to 101 due to rounding.
Global Multichannel Survey 2013
PwC

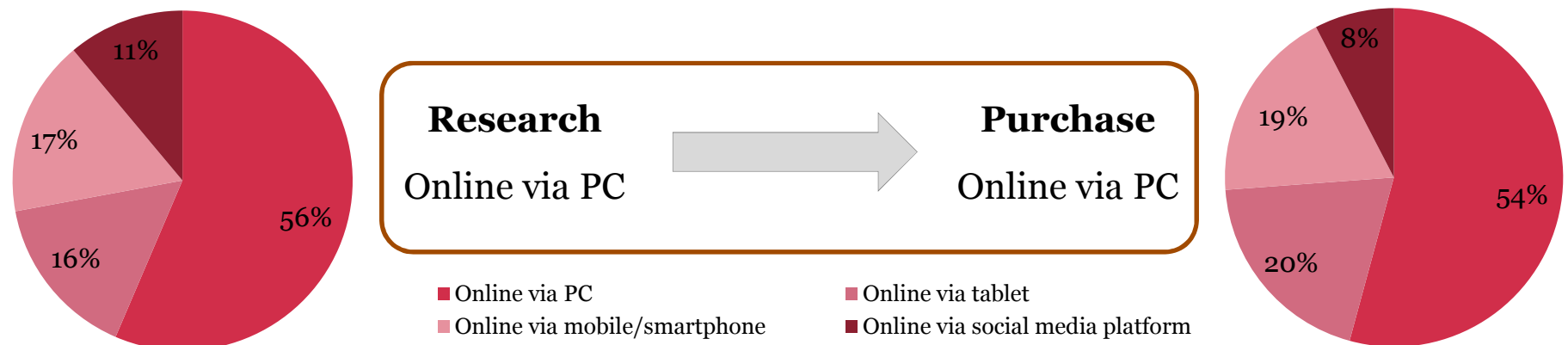
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Do-it-yourself/home improvement

Preferred purchase journey



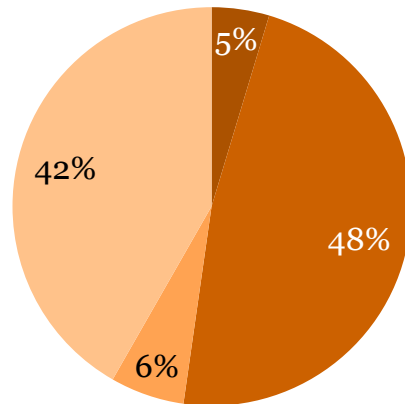
Online channels separated



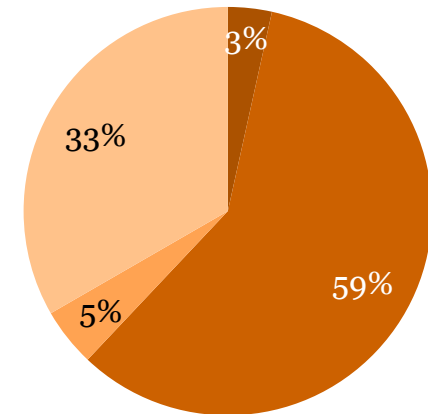
Note: % totals may range from 99 to 101 due to rounding.
Global Multichannel Survey 2013
PwC

Grocery

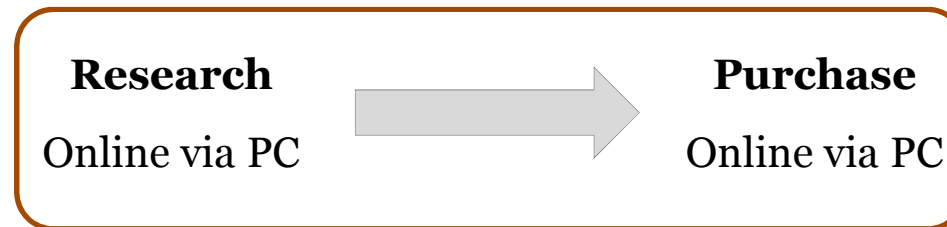
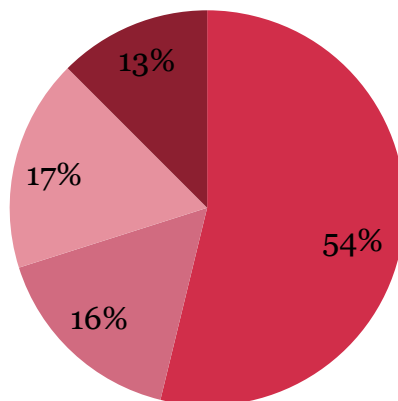
Preferred purchase journey



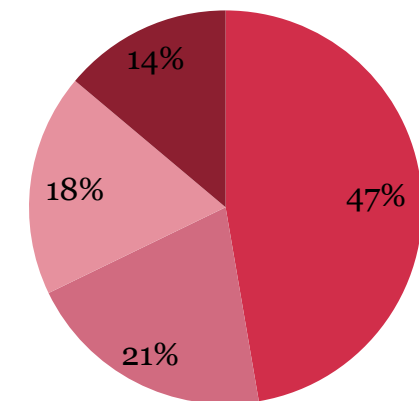
■ Catalogue/magazine ■ In-Store
■ TV Shopping ■ Online



Online channels separated



■ Online via PC ■ Online via tablet
■ Online via mobile/smartphone ■ Online via social media platform

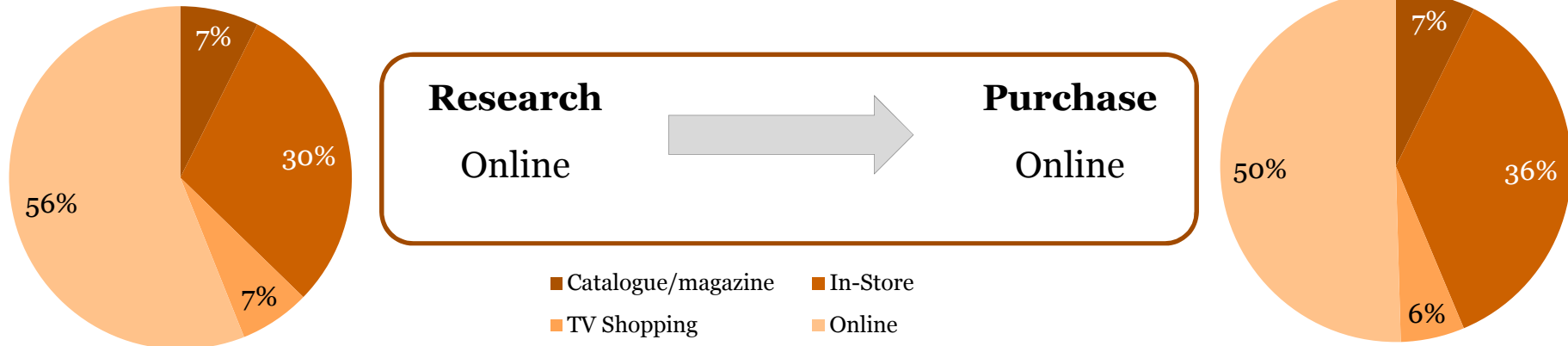


Note: % totals may range from 99 to 101 due to rounding.
Global Multichannel Survey 2013
PwC

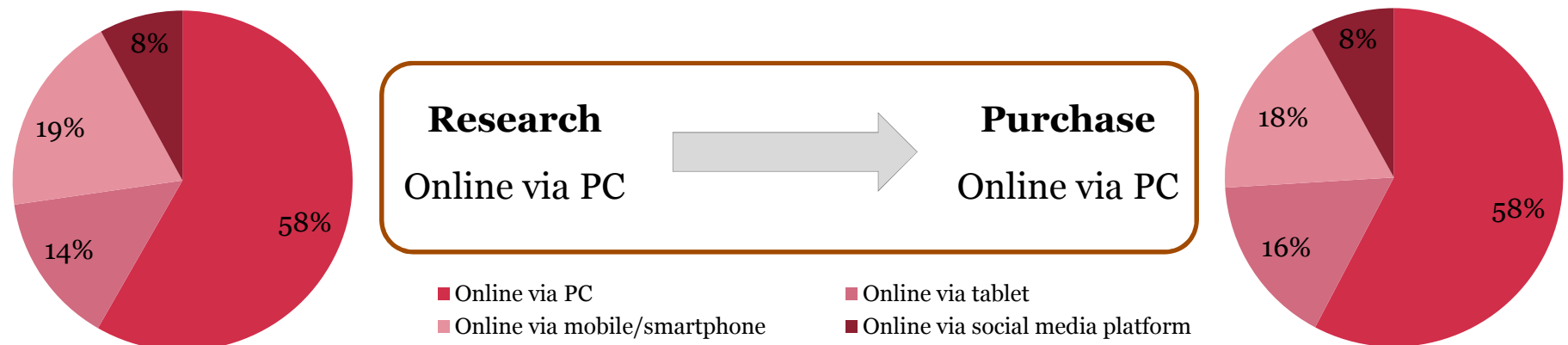
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Toys

Preferred purchase journey



Online channels separated

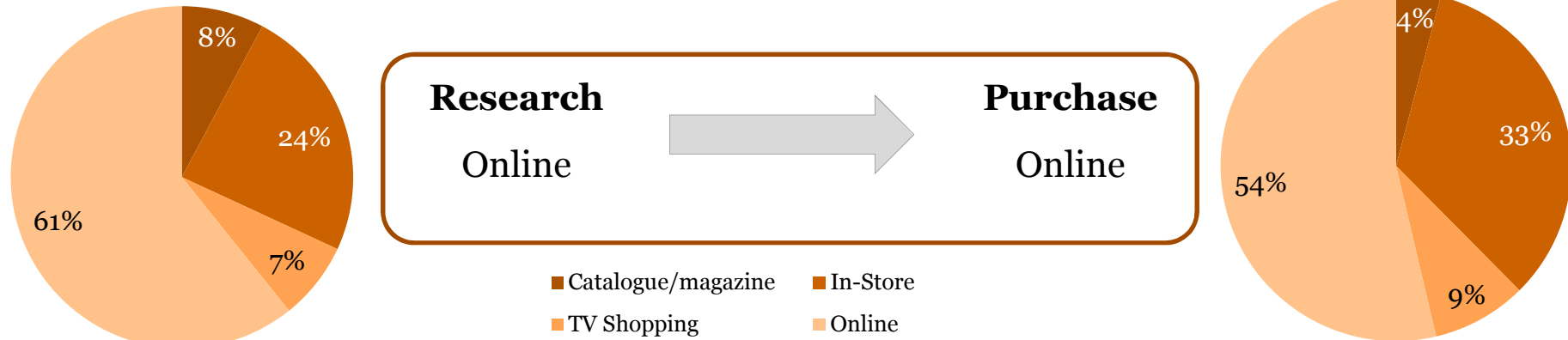


Note: % totals may range from 99 to 101 due to rounding.
Global Multichannel Survey 2013
PwC

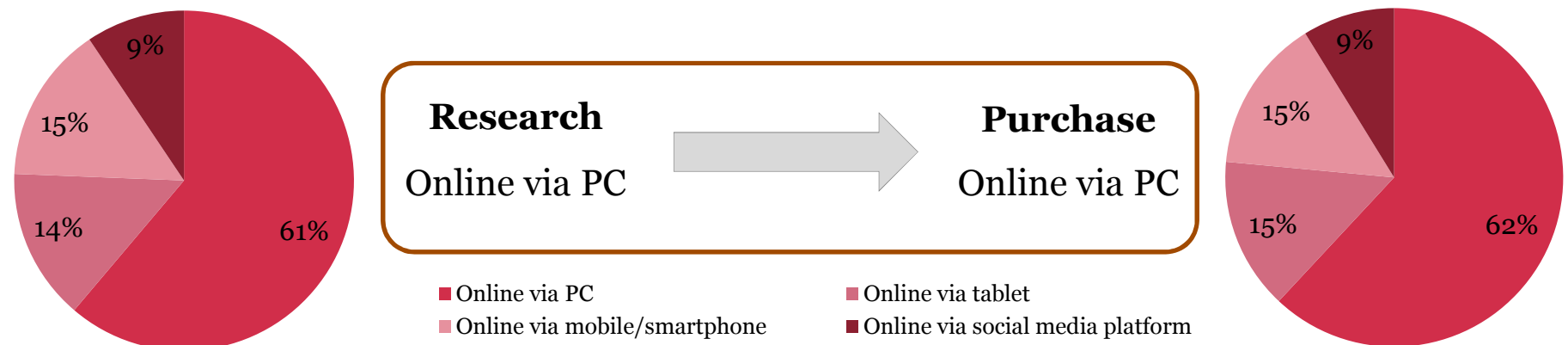
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Health and beauty (cosmetics)

Preferred purchase journey



Online channels separated

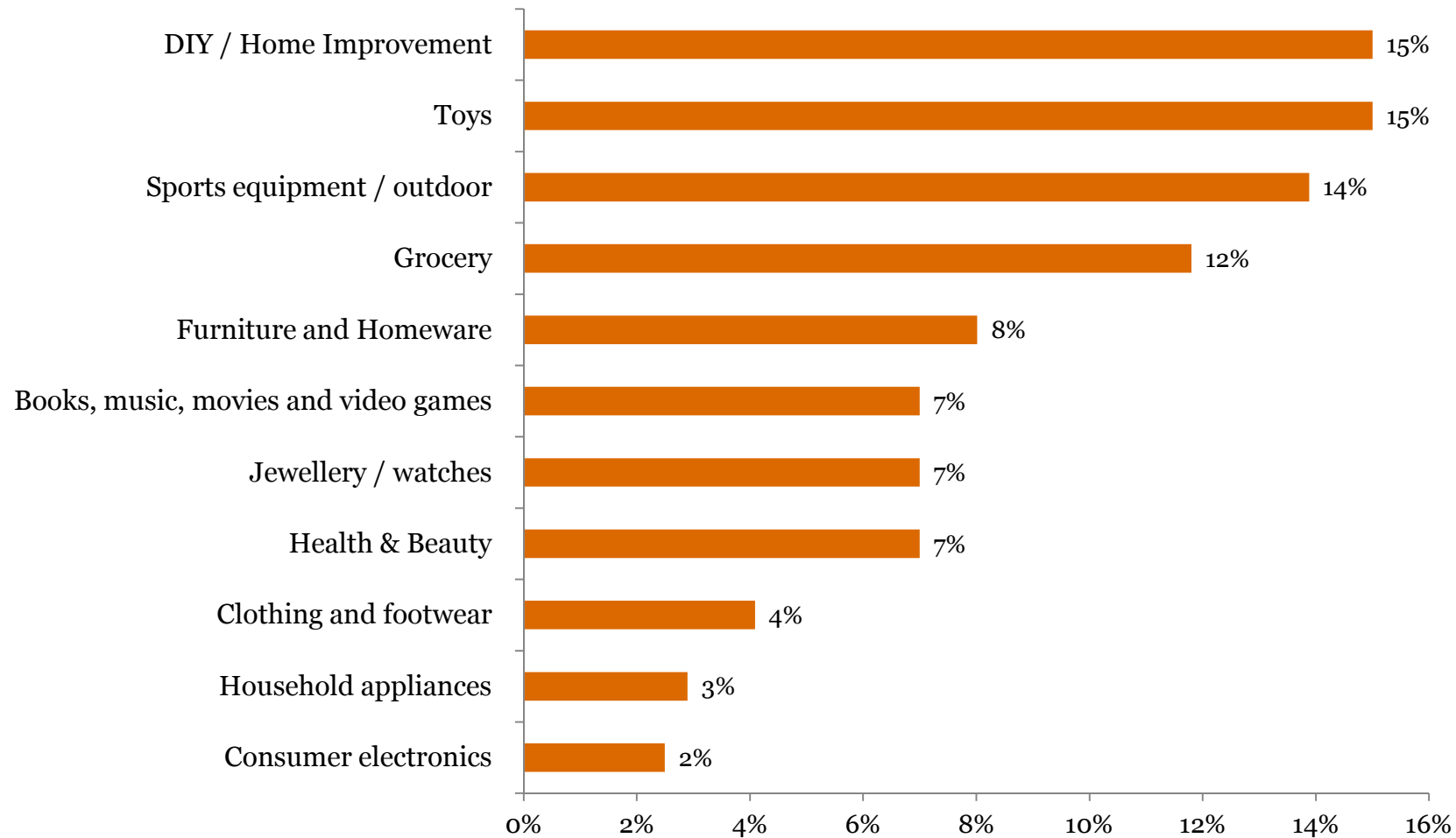


Note: % totals may range from 99 to 101 due to rounding.
Global Multichannel Survey 2013
PwC

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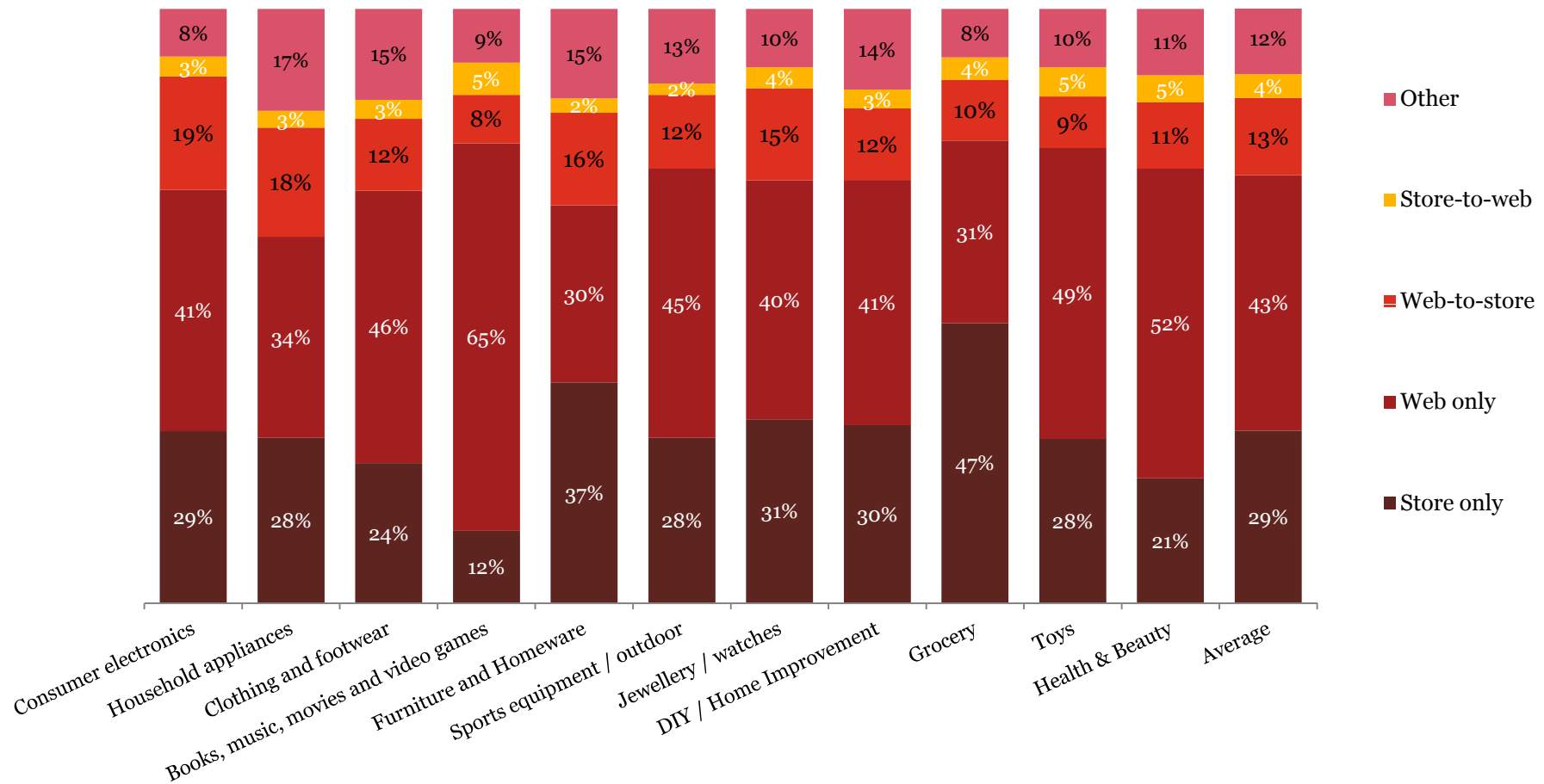
Cross-channel shopping behaviour

Those who do not research before purchasing



Cross-channel shopping behaviour

Research to purchase



Q31. Which are the most important delivery options for you when making a purchase online?

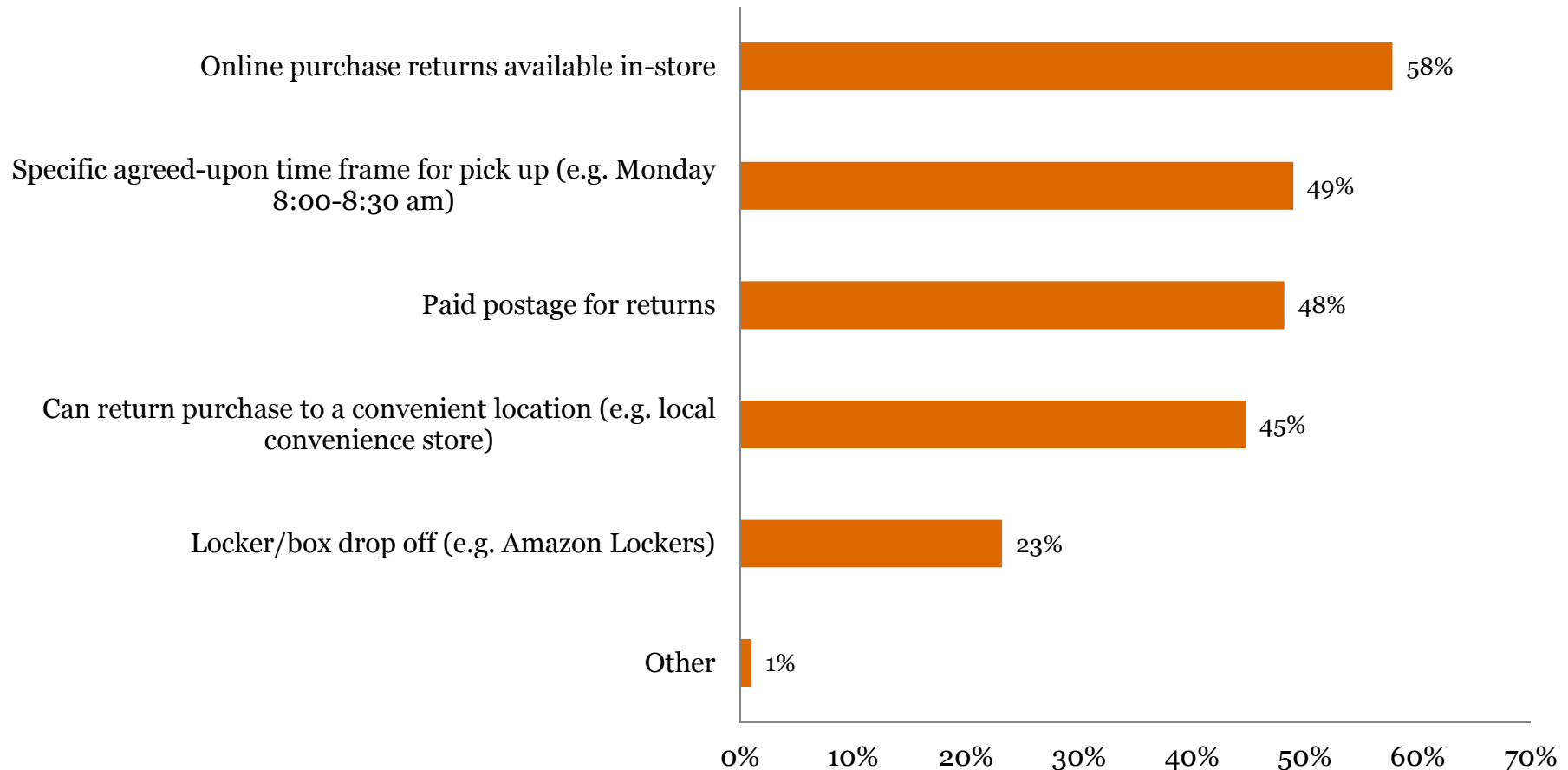


Base: 1006

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Q32. Which are the most important return options for you when making a purchase online?



Base: 1001

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PwC

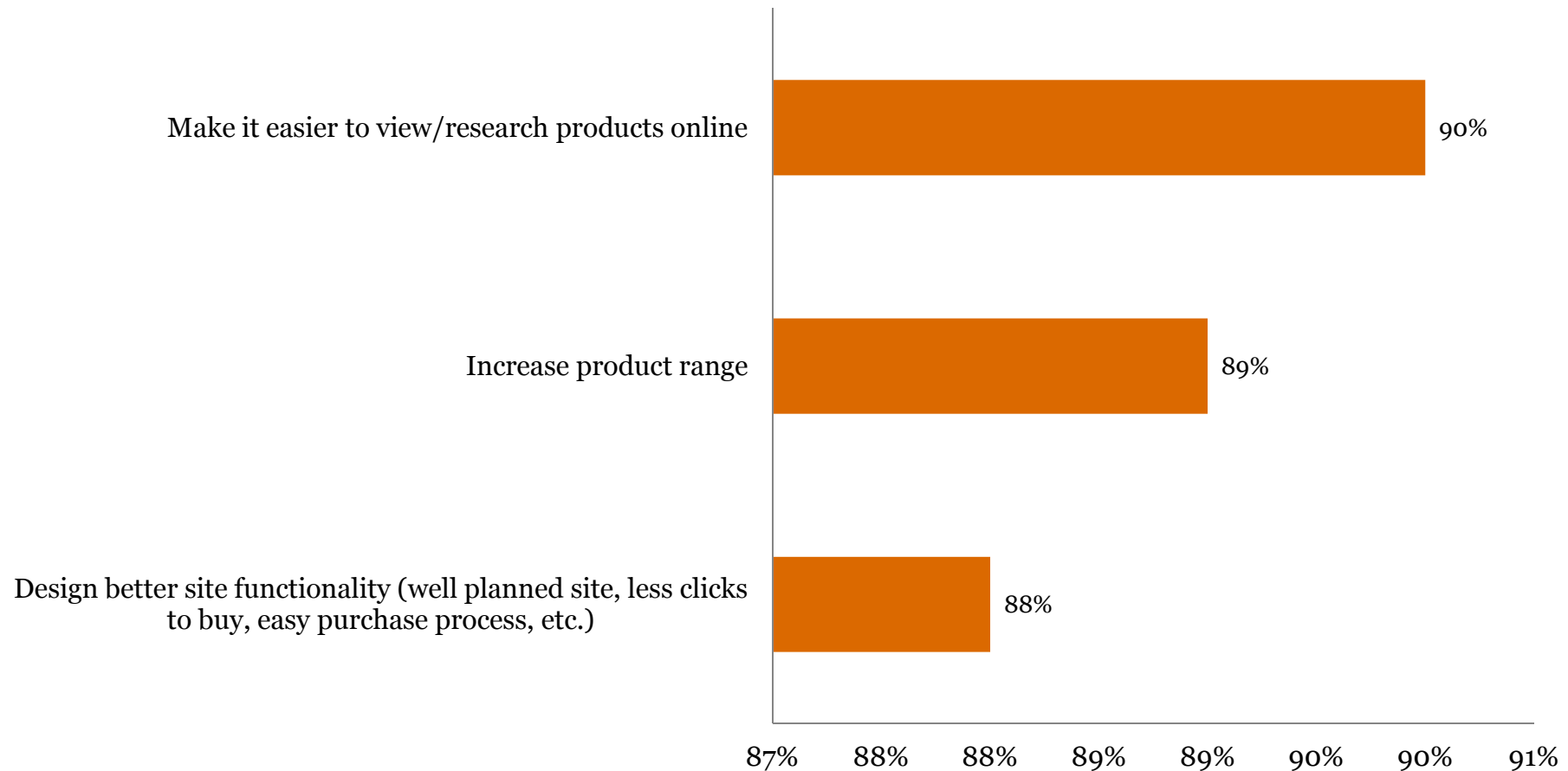
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India specific questions

Q33. What do you wish Indian online retailers would do to make you research, browse and shop online more?

Q34. Which product categories do you prefer to buy through your phone?

Q33. What do you wish Indian online retailers would do to make you research, browse and shop online more? (India specific question)

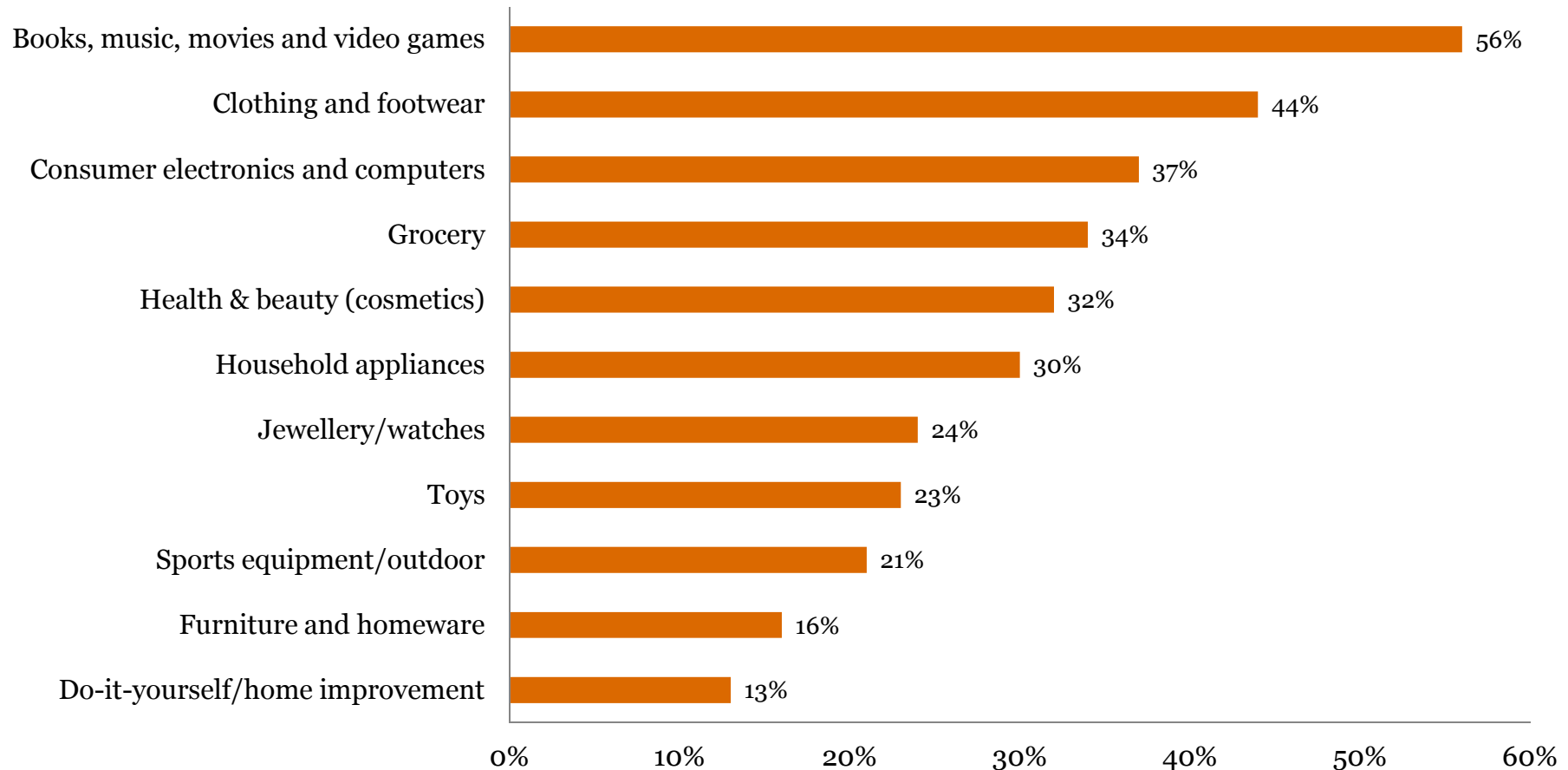


Base: 1002

Global Multichannel Survey 2013
PwC

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Q34. Which product categories do you prefer to buy through your phone? (India specific question)



Base: 974

Global Multichannel Survey 2013
PwC

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