

Moments that matter Research - France

June 2015



Methodology

Quantitative Attitudinal Survey

A total of 1,001 respondents in France age 18+ completed an online survey focusing on macro-level insights on consumer's overall Mobile Path to Purchase. In addition, it also gathered compelling and actionable insights across 4 key verticals: Retail, Health & Beauty, Travel, Media & Entertainment

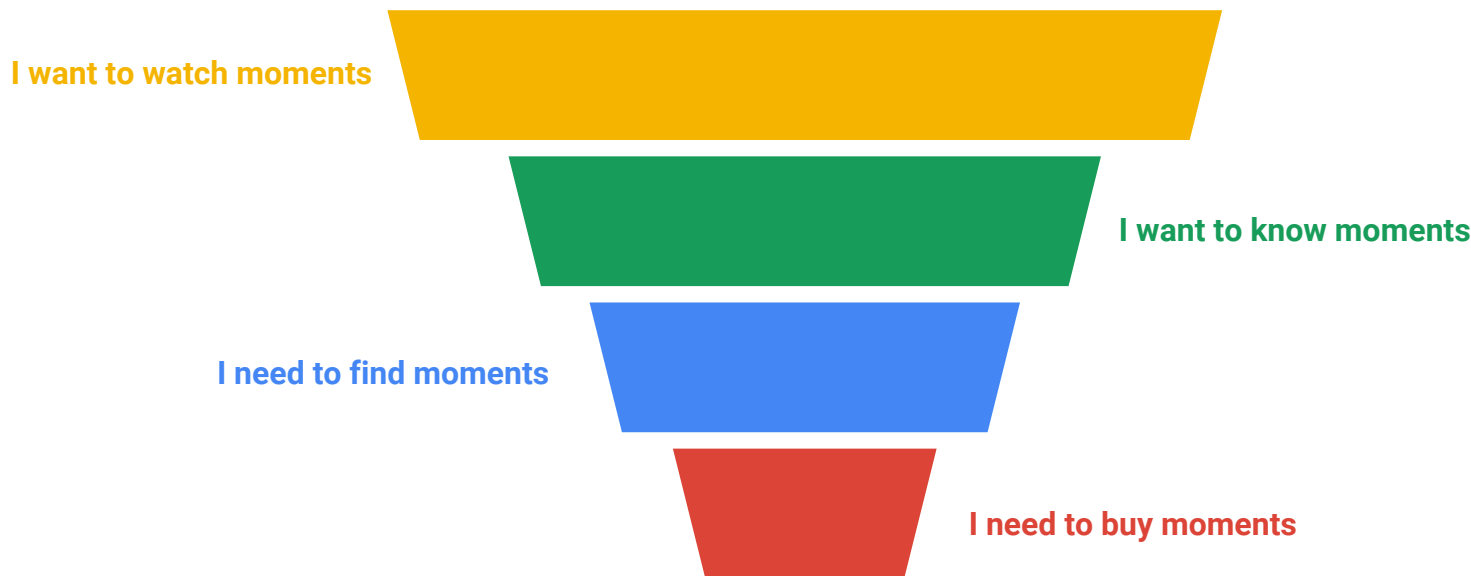
The study was fielded between June 15, 2015 and June 17, 2015

Respondents met the following criteria for inclusion in this research:

- Internet users 18+
- Smartphone/tablet or desktop/laptop users
- Have purchased at least 1 type of product from specific category in the past 6 months: Retail, Health & Wellness, Travel, or Media & Entertainment

Summary

Constant connectivity has not only transformed behaviour, but also expectations. Now, more than ever, we turn to our devices during real intent-driven moments where we want to do, need to find, or need to buy something, and expect immediate and relevant answers. These moments are crucial for brands because they are where decisions are being made and preferences are being shaped - these are moments that matter.



I want to watch moments

Mobile video viewers are almost

1.1x

as likely as television viewers to consider it
important that advertising fits
with the content they're watching



Within the past month, 50% of online consumers looked on **YouTube** for ideas on...

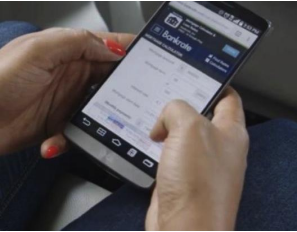
22% Fixing a product

18% Cooking instructions

17% Comparing products


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Source: Ipsos Moments that Matter Research EMEA, June 2015, France

I want to know moments



69% of under 25s agree that they can find a YouTube video on ANYTHING they want to learn

72% of under 35s agree that they can find a YouTube video on ANYTHING they want to learn

A close-up photograph of a person's hands interacting with a tablet device. The hands are positioned over the screen, with fingers touching and moving across it. The background is blurred, showing what appears to be a desk or office environment. A dark, semi-transparent hexagonal shape is overlaid on the left side of the image, containing white text.

In a typical week, 81% of online consumers say they've turned to a device for immediate information or ideas as a reaction to a:

34% TV commercial

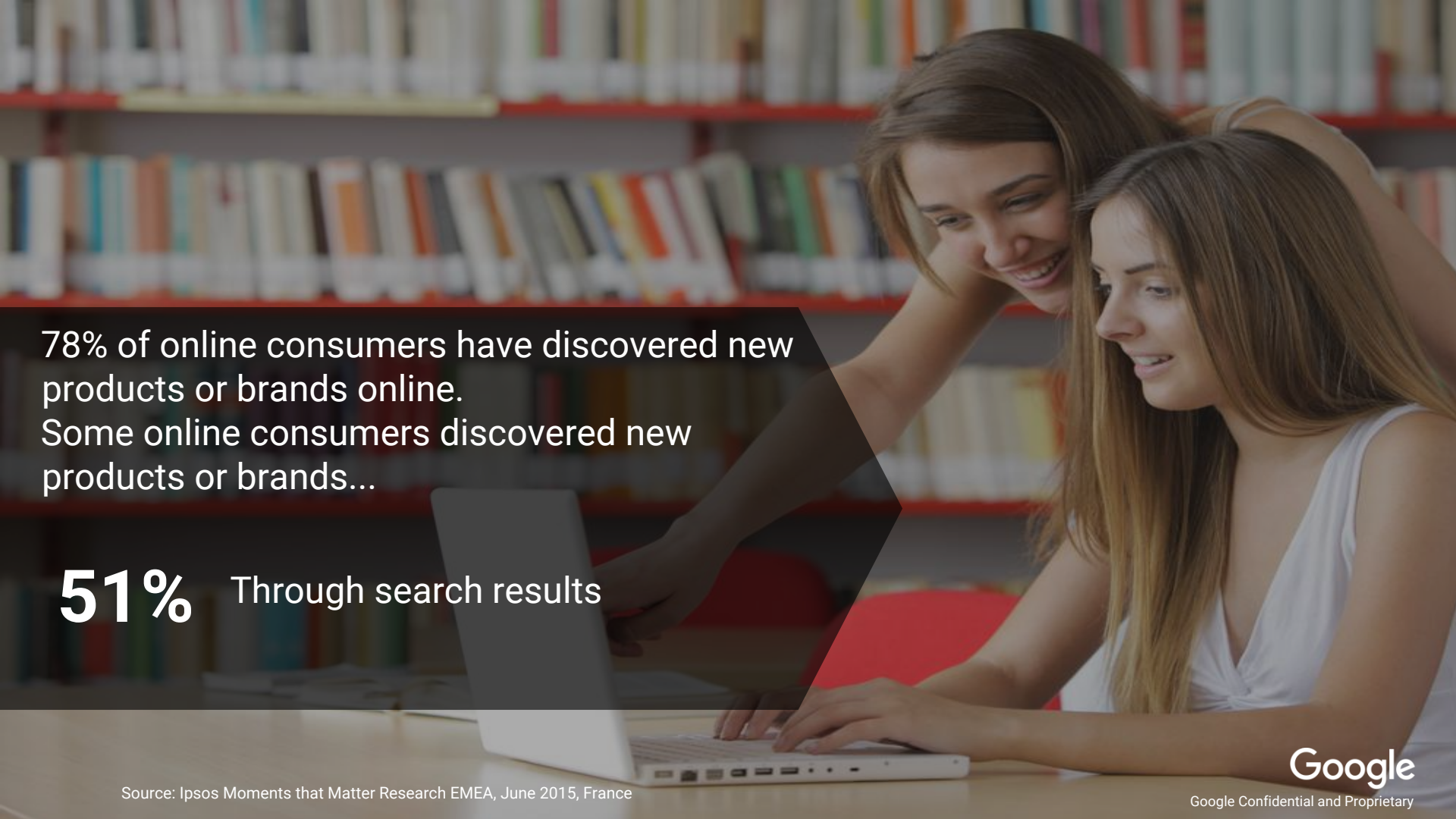
27% Magazine or newspaper ad

64%

**of smartphone users
regularly turn to their
smartphone for ideas while
doing a given task**

(e.g. finding "how to" information
when cooking, exercising, making
repairs)

I need to find moments

A photograph of two young women with long hair sitting at a desk in a library. They are looking at a laptop screen. The woman on the left is pointing at the screen, and the woman on the right is typing on the keyboard. The background shows bookshelves filled with books.

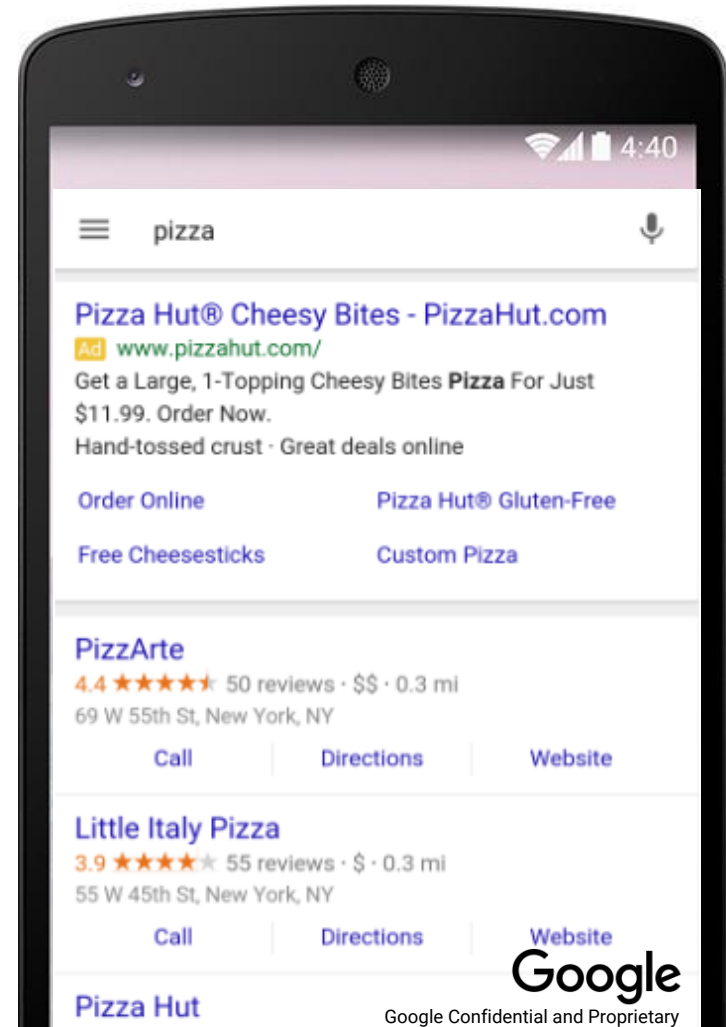
78% of online consumers have discovered new products or brands online.
Some online consumers discovered new products or brands...

51% Through search results


62%

of smartphone users agree "When conducting a search on my smartphone, I like that there is an option to easily call a business directly from search results."

Source: Ipsos Moments that Matter Research EMEA, June 2015, France



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A close-up photograph of a person's hands interacting with a tablet device. The hands are positioned over the screen, with fingers touching and moving across it. The background is blurred, showing what appears to be a desk or office environment. A dark, semi-transparent hexagonal overlay is placed over the top-left portion of the image, containing white text.

In a typical week, 81% of online consumers say they've turned to a device for immediate information or ideas as a reaction to a:

34% TV commercial

27% Magazine or newspaper ad

I need to buy moments

A person in a purple shirt is shown from the side, looking down at a smartphone. The background is a balcony railing and a sunset sky with a silhouette of another person in the distance. A semi-transparent dark grey box is overlaid on the image, containing text.

60%

of consumers conducting research on their smartphone have thought about purchasing a brand they would not normally consider because of relevant information available on their smartphone in the moment



54%

of consumers conducting research on their smartphone have thought about purchasing a retail brand they would not normally consider because of relevant information available on their smartphone in the moment



45%

of consumers conducting research on their smartphone have thought about purchasing a **health & beauty** brand they would not normally consider because of relevant information available on their smartphone in the moment



43%

of consumers conducting research on their smartphone have thought about purchasing a **travel services** brand they would not normally consider because of relevant information available on their smartphone in the moment



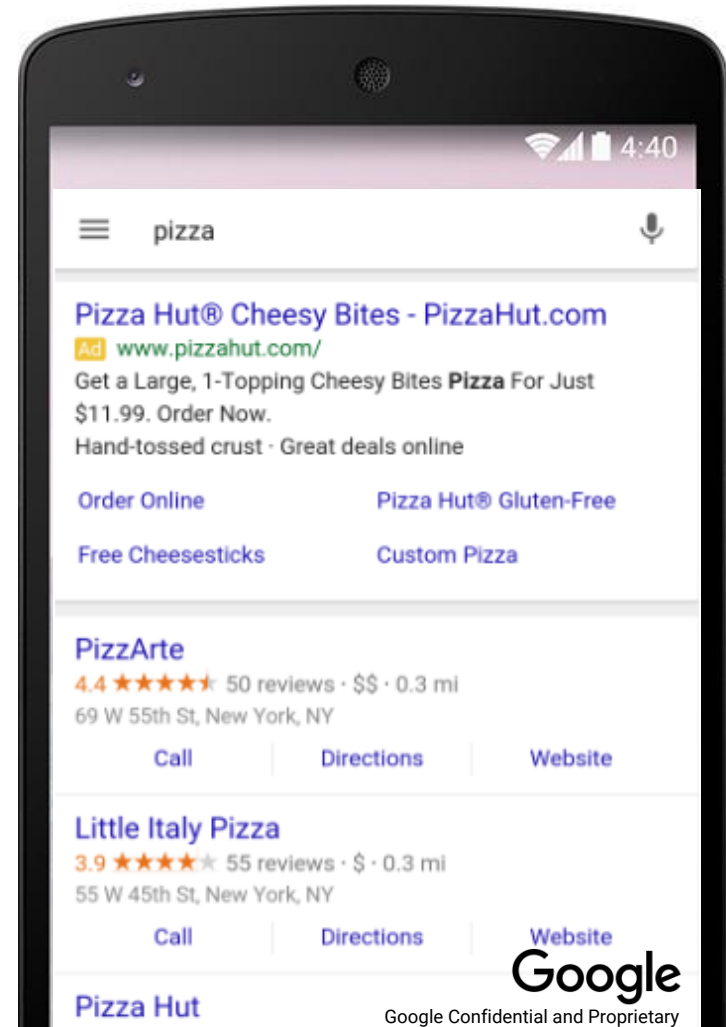
56%

of consumers conducting research on their smartphone
have thought about purchasing a
media & entertainment
brand they would not normally consider
because of relevant information available on their
smartphone in the moment

62%

of smartphone users agree "When conducting a search on my smartphone, I like that there is an option to easily call a business directly from search results."

Source: Ipsos Moments that Matter Research EMEA, June 2015, France



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48%

of smartphone users agree that the last time they used their smartphone while shopping at the store, the information found impacted their purchase decision



21%

of smartphone users agree that the last time they used their smartphone while shopping at the store, the information found helped them choose what to buy



Smartphones are used
in the following ways when shopping for
retail products...

35% To research prices

29% Search for product information

21% To locate a store / business

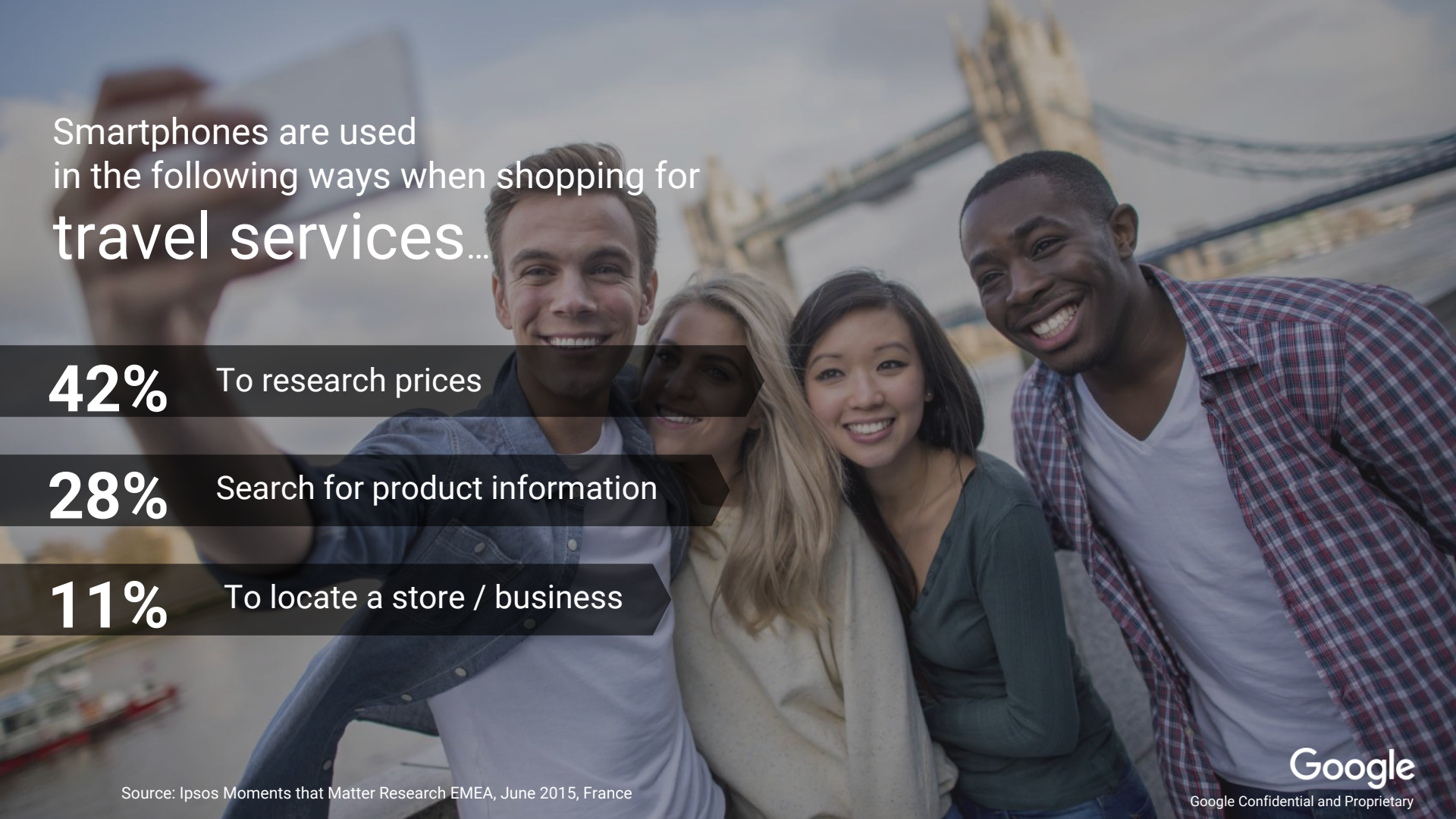
Smartphones are used
in the following ways when shopping for
health & beauty products...

23% Search for product information

21% To research prices

13% To locate a store / business





Smartphones are used
in the following ways when shopping for
travel services...

42% To research prices

28% Search for product information

11% To locate a store / business



Smartphones are used in the following ways when shopping for media & entertainment products...

31% To research prices

30% Search for product information

22% To locate a store / business



33%

of online consumers agree that the relevance of a company's message influences their opinion of a brand

71%

**of smartphone users
have used their
smartphone to gather
information for the
purchase of a product or
service**

Source: Ipsos Moments that Matter Research EMEA, June 2015, France

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7%

**of people who conduct
research on their smartphone
know the exact brand/product
they want to buy when they
begin their research online**



93% of consumers who researched a product/brand on their smartphone have taken the following actions

58% Searched for more information on a brand

57% Visited a store or related website

39% Considered purchasing a brand

27% Watched a related YouTube video



52%

of consumers conducting research on their smartphone have purchased a brand they would not normally purchase because of relevant information available on their smartphone in the moment



40%

of consumers conducting research on their smartphone have actually purchased a **retail** brand they would not normally purchase because of relevant information available on their smartphone in the moment



34%

of consumers conducting research on their smartphone have actually purchased a **health & beauty** brand they would not normally purchase because of relevant information available on their smartphone in the moment



35%

of consumers conducting research on their smartphone have actually purchased a **travel services** brand they would not normally purchase because of relevant information available on their smartphone in the moment

A person is holding a smartphone in the foreground, with a television in the background showing a soccer game. The scene is dimly lit, suggesting an indoor setting like a living room.

45%

of consumers conducting research on their smartphone have actually purchased a **media & entertainment** brand they would not normally purchase because of relevant information available on their smartphone in the moment

A person is shown from the chest up, looking down at a smartphone held in both hands. They are standing on a balcony with a wooden railing, and the background is a bright, hazy outdoor setting. The image is split vertically, with the left side being a dark overlay containing text and the right side showing the person and the balcony.

45%

of consumers conducting research on their smartphone have actually purchased a **Media & Entertainment** brand they would not normally purchase because of relevant information available on their smartphone in the moment

40%

of consumers conducting research on their smartphone have actually purchased a **Retail** brand they would not normally purchase because of relevant information available on their smartphone in the moment

35%

of consumers conducting research on their smartphone have actually purchased a **Travel** brand they would not normally purchase because of relevant information available on their smartphone in the moment

34%

of consumers conducting research on their smartphone have actually purchased a **Health & Beauty** brand they would not normally purchase because of relevant information available on their smartphone in the moment

48%

of smartphone users agree that the last time they used their smartphone while shopping at the store, the information found impacted their purchase decision

Source: Ipsos Moments that Matter Research EMEA, June 2015, France

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Online consumers agree that the following things they see or hear have a very strong/strong/moderate influence on their opinion of a retail brand...

- 75% What I hear from friends or family
- 59% What I see specifically from companies offline
- 58% What I see specifically from companies online

Online consumers agree that the following things they see or hear have a very strong/strong/moderate influence on their opinion of a

health & beauty brand...

75%

What I hear from friends or family

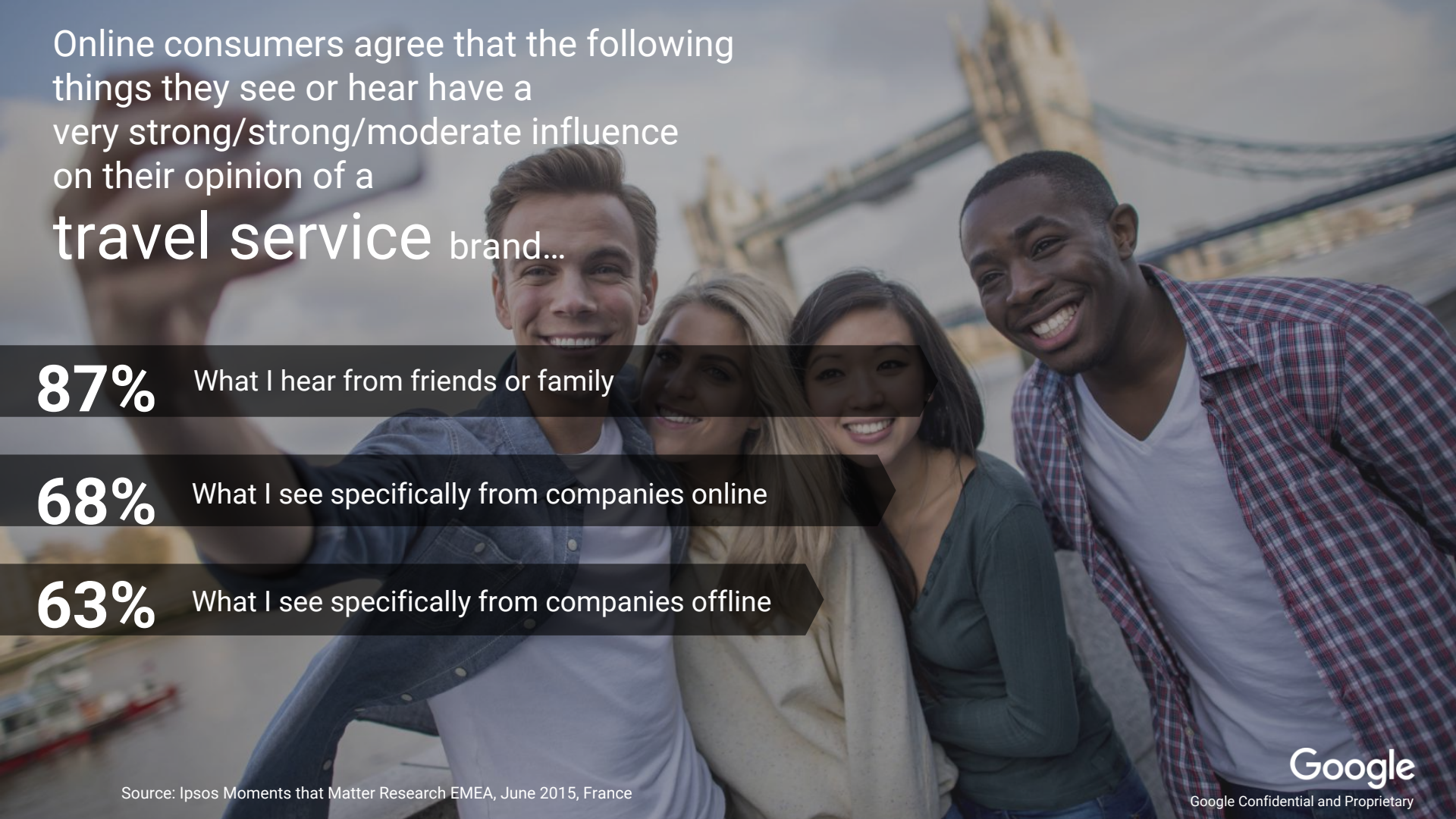
58%

What I see specifically from companies offline

51%

What I see specifically from companies online





Online consumers agree that the following things they see or hear have a very strong/strong/moderate influence on their opinion of a **travel service** brand...

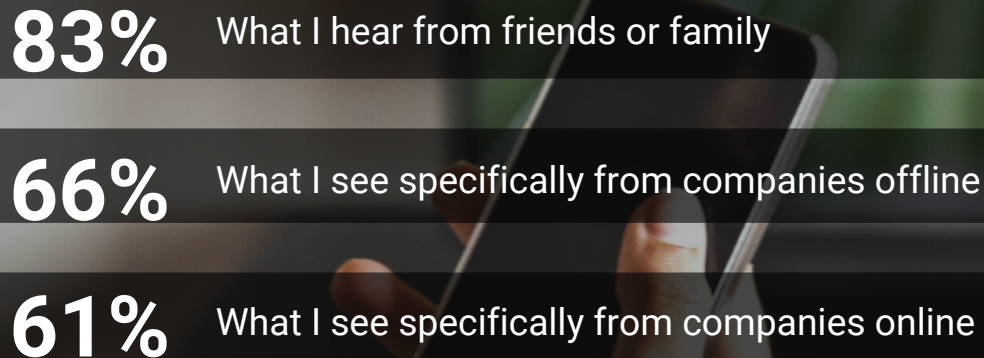
87% What I hear from friends or family

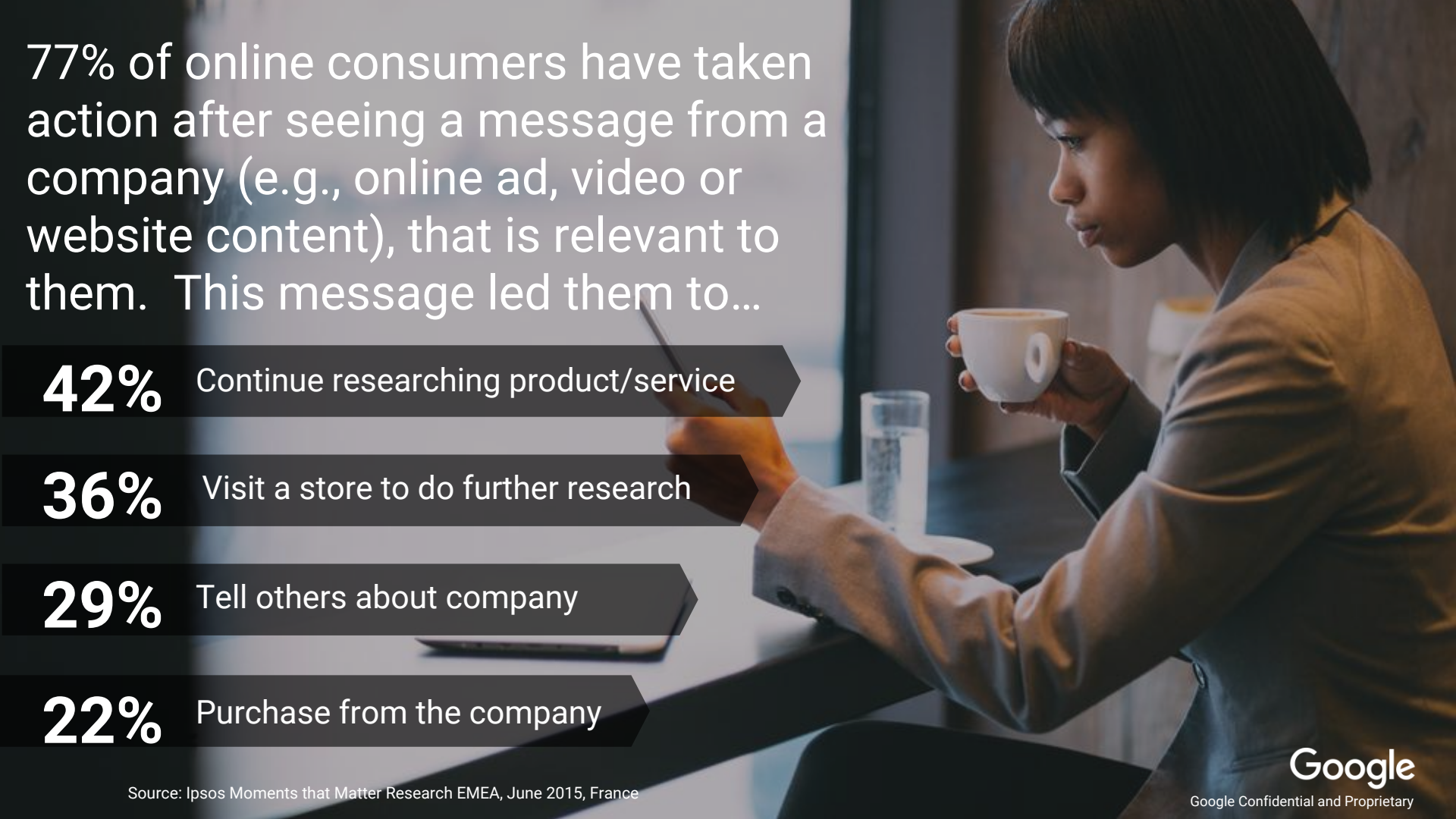
68% What I see specifically from companies online

63% What I see specifically from companies offline

Online consumers agree that the following things they see or hear have a very strong/strong/moderate influence on their opinion of a

media & entertainment brand...





77% of online consumers have taken action after seeing a message from a company (e.g., online ad, video or website content), that is relevant to them. This message led them to...

42% Continue researching product/service

36% Visit a store to do further research

29% Tell others about company

22% Purchase from the company



32%

of online consumers agree that their opinion of a
retail
brand is influenced by seeing a company's
messaging (e.g. advertising, video, website)
when it's most relevant to them



29%

of online consumers agree that their opinion of a
health & beauty
brand is influenced by seeing a company's
messaging (e.g. advertising, video, website)
when it's most relevant to them



42%

of online consumers agree that their opinion of a
travel services
brand is influenced by seeing a company's
messaging (e.g. advertising, video, website)
when it's most relevant to them



43%

of online consumers agree that their opinion of a
media & entertainment
brand is influenced by seeing a company's
messaging (e.g. advertising, video, website)
when it's most relevant to them

Smartphone users would take action right away for at least one of the following occasions using their device...

58%

When an unexpected problem arises

49%

For more information on a brand/product

32%

When I need to buy something

32%

When a new task arises

A man in a blue suit and glasses is looking down at a tablet computer he is holding in his left hand. He is also holding a credit card in his right hand. The background is a blurred outdoor setting with wooden planks.

71%

**of smartphone users
have used their
smartphone to gather
information for the
purchase of a product or
service**

Source: Ipsos Moments that Matter Research EMEA, June 2015, France

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93%

of people who conduct research on their smartphone have used their smartphone to research a product or brand they are thinking about buying

Source: Ipsos Moments that Matter Research EMEA, June 2015, France



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Appendix



68%

**of smartphone users feel
their smartphone enables
them to act
spontaneously when their
interests or passions are
sparked**

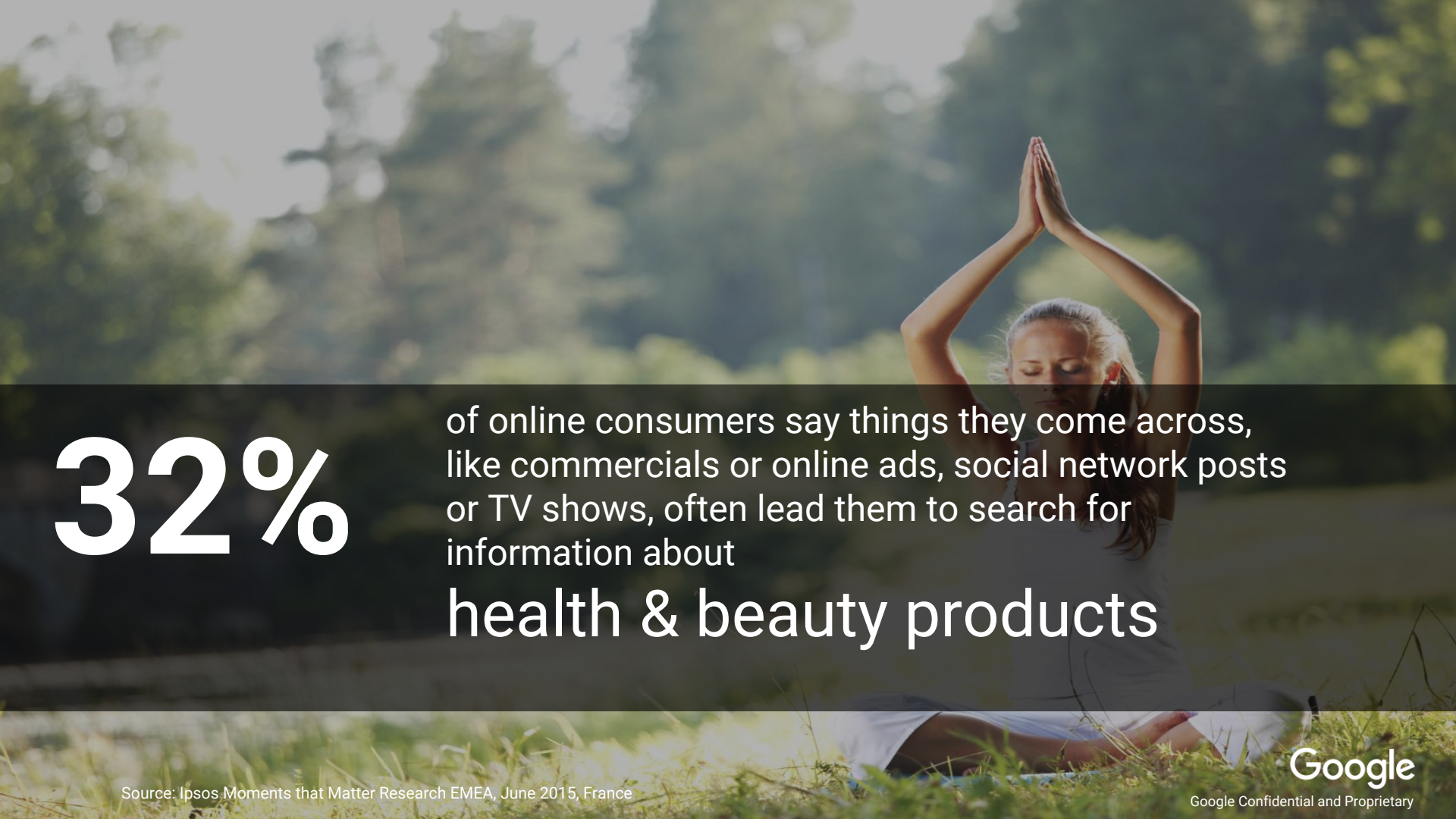


35%

of online consumers say things they come across, like commercials or online ads, social network posts or TV shows, often lead them to search for information about
retail products

Source: Ipsos Moments that Matter Research EMEA, June 2015, France

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32%

of online consumers say things they come across, like commercials or online ads, social network posts or TV shows, often lead them to search for information about
health & beauty products



46%

of online consumers say things they come across, like commercials or online ads, social network posts or TV shows, often lead them to search for information about
travel services



41%

of online consumers say things they come across, like commercials or online ads, social network posts or TV shows, often lead them to search for information about

media & entertainment products

36%

**of online consumers
strongly agree/agree that
brands that consistently
show in their searches
are relevant to them**

Source: Ipsos Moments that Matter Research EMEA, June 2015, France



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45%

of people doing research on their smartphone agree that they have been influenced to visit a store or make a purchase of

retail products

by seeing a company's messaging (e.g. advertising, video, website) when it's most relevant to them



36%

of people doing research on their smartphone agree that they have been influenced to visit a store or make a purchase of

health & beauty products

by seeing a company's messaging (e.g. advertising, video, website) when it's most relevant to them



38%

of people doing research on their smartphone agree that they have been influenced to visit a store or make a purchase of

travel services

by seeing a company's messaging (e.g. advertising, video, website) when it's most relevant to them



50%

of people doing research on their smartphone agree that they have been influenced to visit a store or make a purchase of

media & entertainment products

by seeing a company's messaging (e.g. advertising, video, website) when it's most relevant to them