



Offline Shoppers who Research Online Spend More

Quantifying the Role of the Web on In-Store TV Purchases at Fnac
Google/Fnac
Spain, September 2010

Agenda

1 Objectives & Methodology

2 Quantifying The Online2Store Effect

3 Profile of Online Researchers vs Offline Researchers

4 Purchase Process of Online Researcher

5 Conclusions

Objectives and Methodology



Objectives



1 Quantify the role of the internet in the TV purchase process



2 Identify the differences between those that use the web in the purchase process vs those that don't



3 Understand purchase process of online researcher

Methodology




357 offline TV purchasers @ Fnac recruited via contest entry at point of purchase (in store)



Follow up telephone interview then conducted 10 days after purchase

thinkretail
with Google

**PARTICIPA EN EL SORTEO DE
4 TARJETAS REGALO POR VALOR DE 250€**

 www.fnac.es

Rellena esta ficha con tus datos personales y las características de la televisión que acabas de adquirir, entrégala en cualquier tienda Fnac de España y participarás en el sorteo de cuatro tarjetas regalo por valor de 250€ cada una*.

Nombre _____ Apellidos _____
Teléfono móvil _____ ¿Eres Socio de Fnac? _____ N° Socio _____
Marca del televisor _____ Firma _____
Tecnología: LCD Plasma LED Otra (especificar) _____
Tamaño: Menos de 15" Entre 15" y 21" P.V.P. _____
Entre 22" y 26" Entre 27" y 32"
Entre 33" y 42" Más de 42" Firma: _____

* Se entregará una tarjeta regalo Kadeos cargada con 250€ a cada uno de los 4 ganadores del sorteo.

En cumplimiento de la LOPD sus datos serán incorporados a un fichero automatizado de titularidad de The Cocktail Analysis S.L., para participar en el sorteo para el que han sido recabados y para participar en encuestas de opinión. Usted podrá en todo momento ejercer sus derechos de acceso, rectificación y/o cancelación mediante solicitud dirigida a The Cocktail Analysis S.L. C/ Salamanca 17 Madrid 28002. Si no quiere ser objeto de comunicaciones comerciales y/o encuestas por parte de The Cocktail Analysis S.L. marque esta casilla.
 No quiero recibir comunicaciones comerciales y/o encuestas.

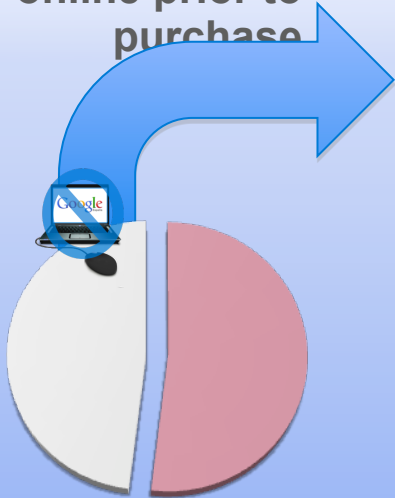
1 Quantifying the online2store effect



52% of those buying a TV offline in-store at Fnac had previously used the internet for research

Quantifying the online2store effect

Amongst those not researching online prior to purchase



I prefer other means of research (friends, visit shop, etc...)

Already knew what I wanted

I don't have access to online

I don't trust the Internet

Didn't occur to me

Other/Don't know

46%

36%

15%

12%

8%

5%

Those not using the internet prefer other means of research, whilst a significant number either don't trust, don't know or don't have access to the web

RESEARCHED
ONLINE

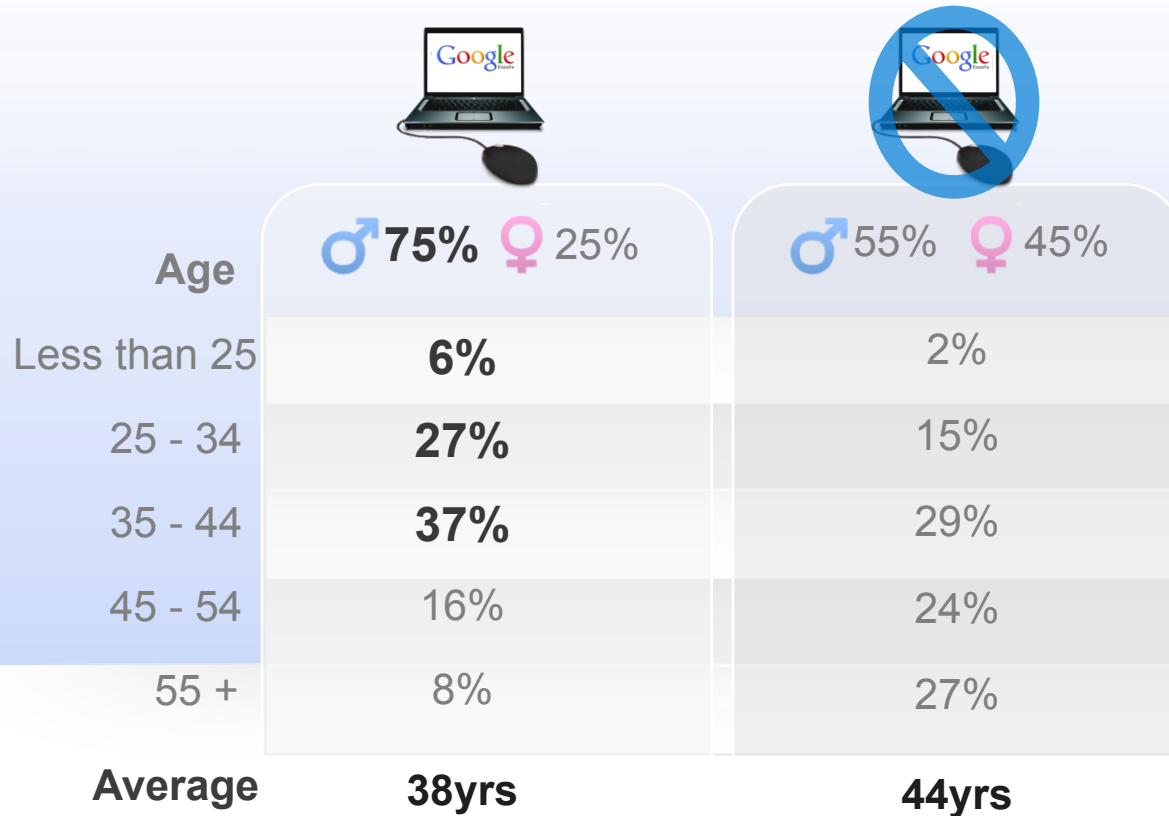


DID NOT
RESEARCH
ONLINE



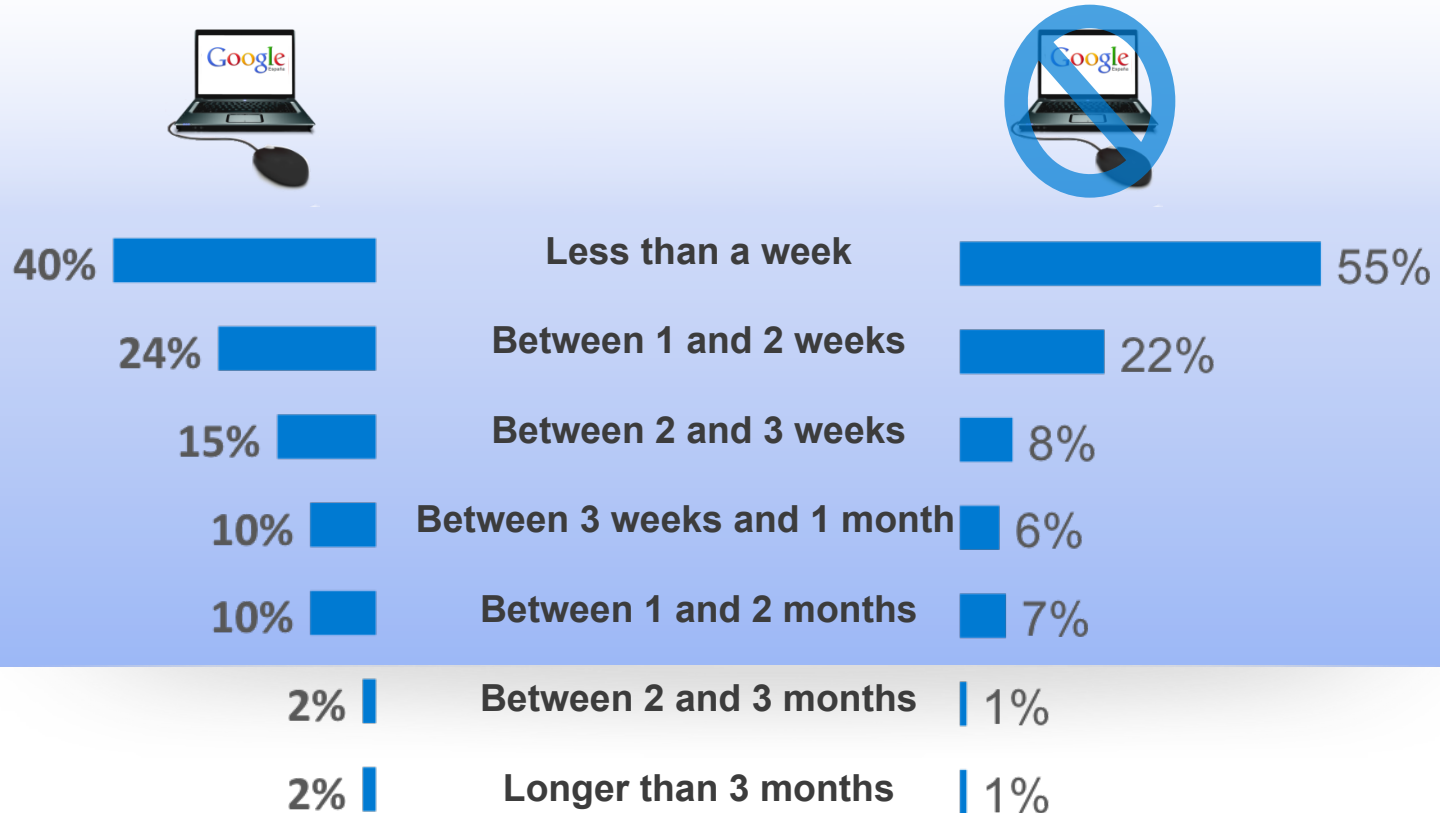
Profile of online researchers vs. offline researchers

Shopper profiles



The online researcher is significantly more male and younger than his offline counterpart

Length of time before final purchase



The online researcher is a more considered shopper, spending longer researching before purchase

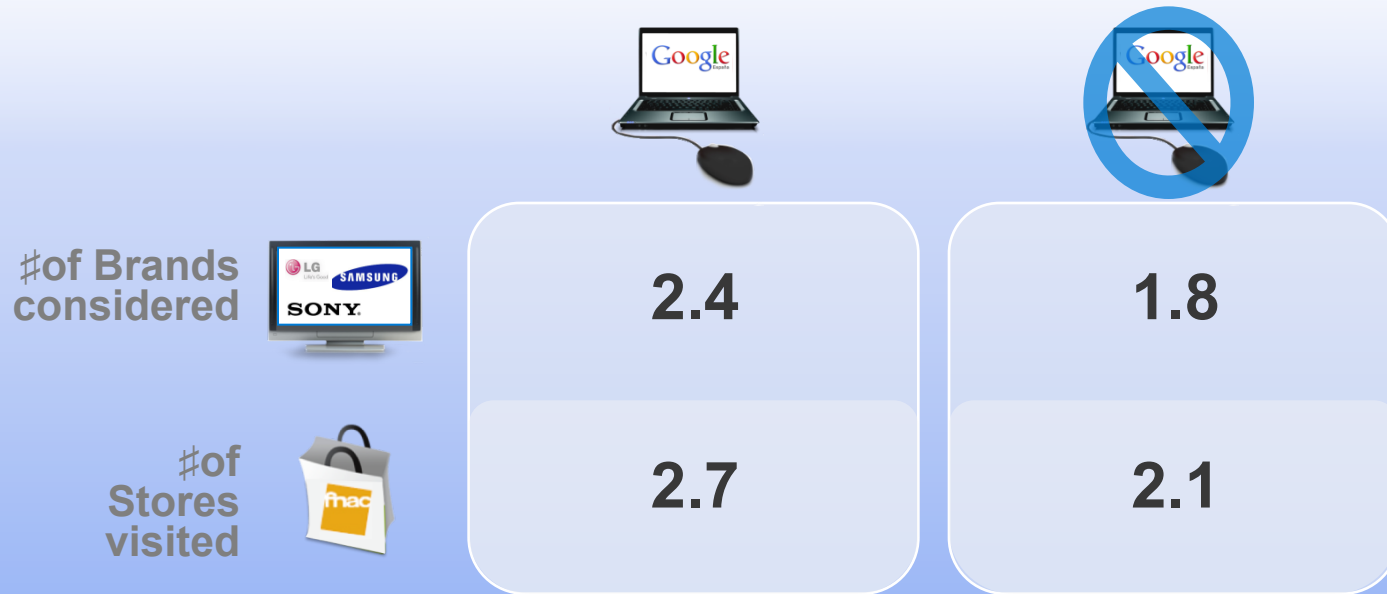
Basket size

Amount Spent

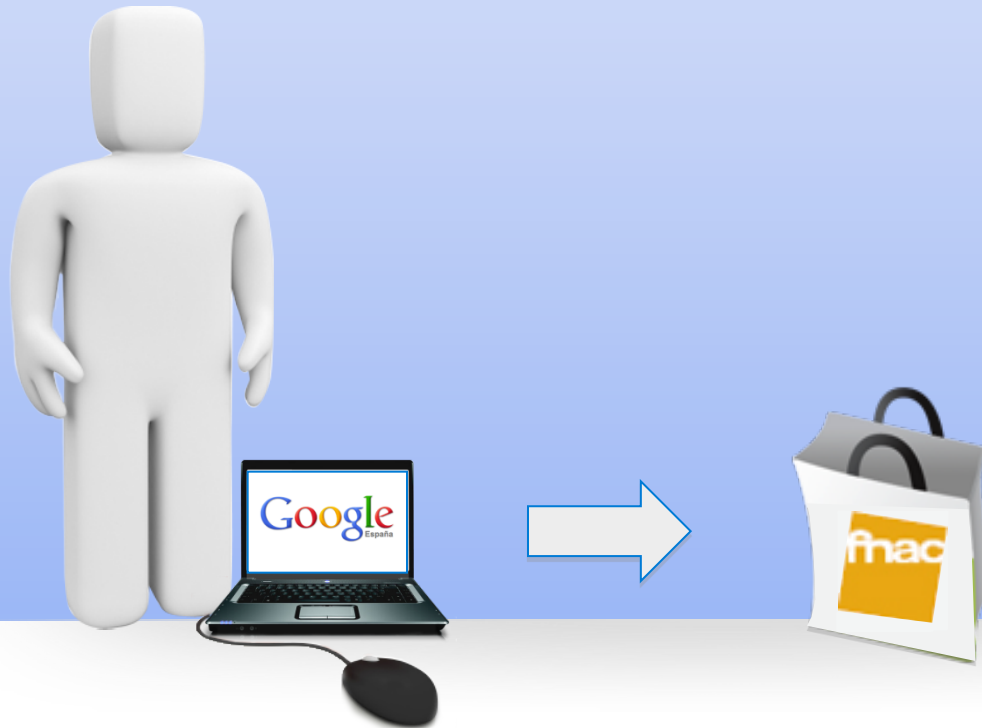


Those researching online spend on average 33% more than those that do not

Brands and Stores considered



Again the online researcher is significantly more considered, reviewing more brands and visiting more stores



Purchase process of online researcher

Reasons for not buying online



54%

Wanted to see
TV before
purchase



16%

Wanted to take
away
immediately



12%

Lack of
confidence of
buying online



11%

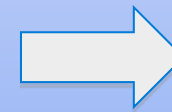
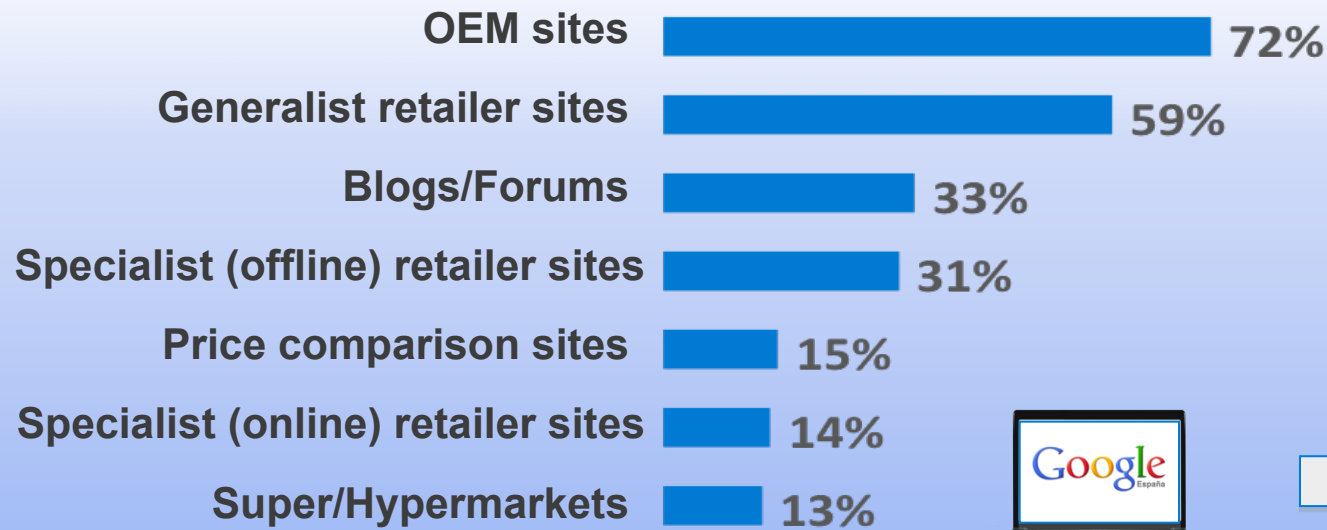
Product
availability



8
%
Questions
about the
product

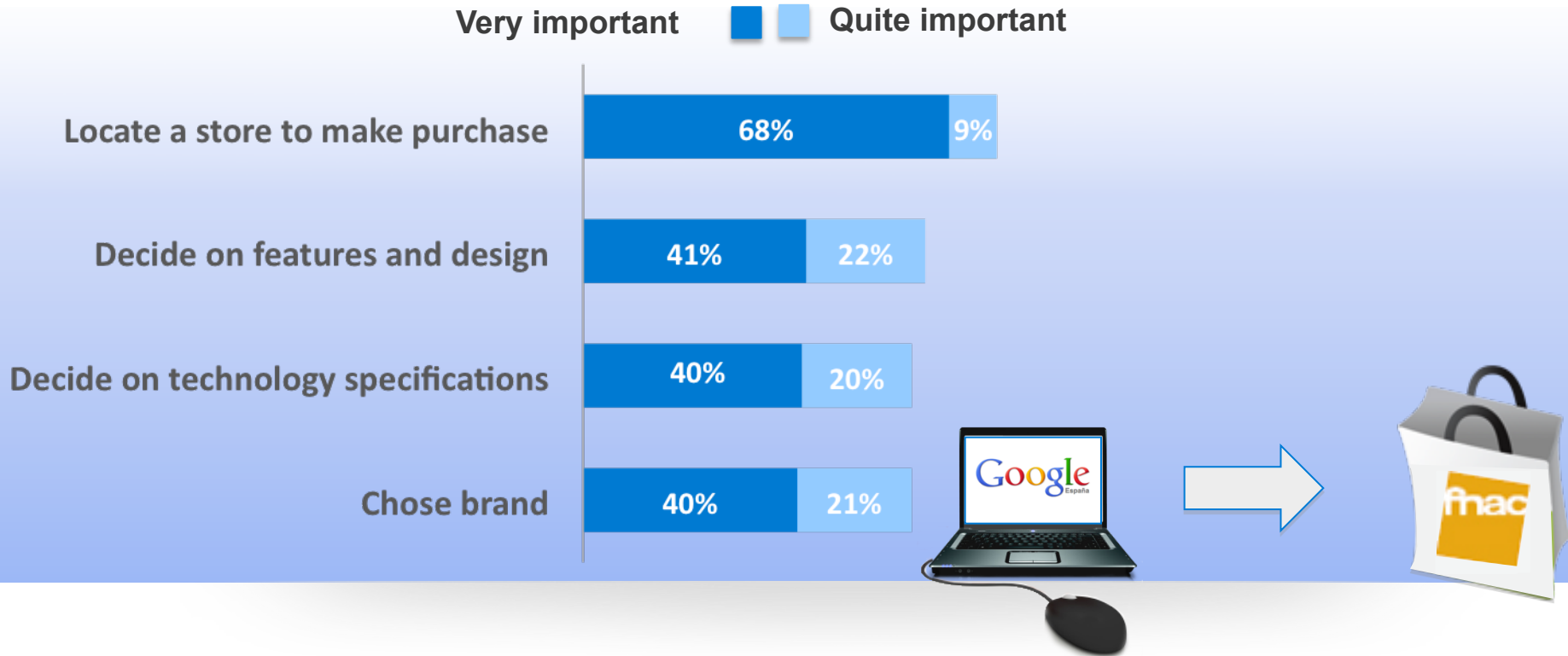
Amongst those researching online physically needing to see the product is the biggest barrier to e-commerce; instant gratification of taking away immediately is also significant

Sites visited in the decision making process



Brand websites are the clear go-to destination for online research

Reasons for internet research before purchase

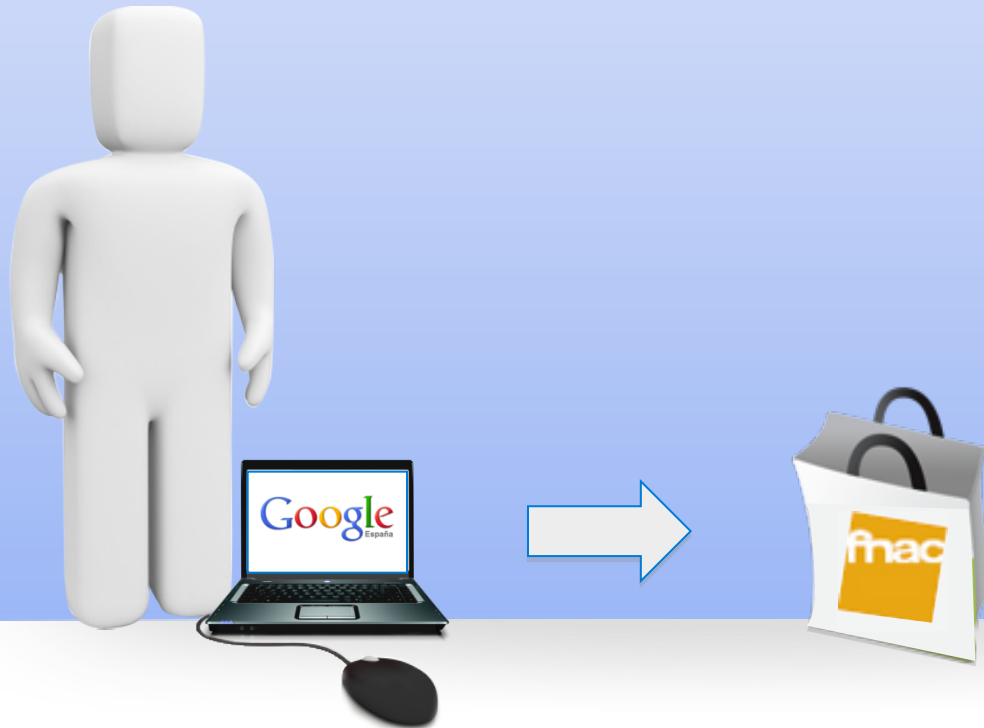


Having a strong presence when consumers are deciding on aspects of their purchase is critical to OEMs and retailers alike

Reasons for internet research before purchase



In store availability and in store pricing/promotion the main “mind changers”



Conclusions



The Majority of offline shoppers research online before purchase



Offline shoppers that research online are more valuable spending 33% more than those that don't research online



They are also more considered shoppers, viewing more brands and visiting more stores



Wanting to see the physical product is the principal barrier to online transaction

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