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# *Total Retail V Survey United States (US)*

October 2014

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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 19 territories: Australia, Belgium, Brazil, Canada, Chile, China/Hong Kong, Denmark, France, Germany, India, Italy, Japan, Middle East, 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 2014 includes updated questions and answer options in addition to new questions on payment methods. 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 August and September 2014, 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 Brewster.

This document contains the results of the Total Retail V research conducted in United States (US).

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# *Methodology*

# *Global research: Consumer shopping behaviour & activity across the world*



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## ***Methodology***

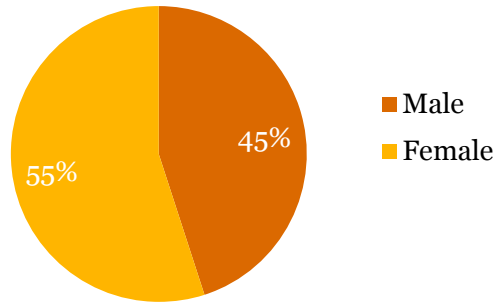
- 19,068 online interviews conducted across 19 territories during August/September 2014.
- In order to survey the most appropriate audience, online survey respondents in each country are nationally representative by the Research Now (RN) panel profile or online users for the following demographics:
  - Age
  - Gender
  - Employment status
  - Region
- The RN panel profile was used for the majority of the countries except UK, Denmark, France, Germany, India and Italy where the national online user profiles were available and applied.

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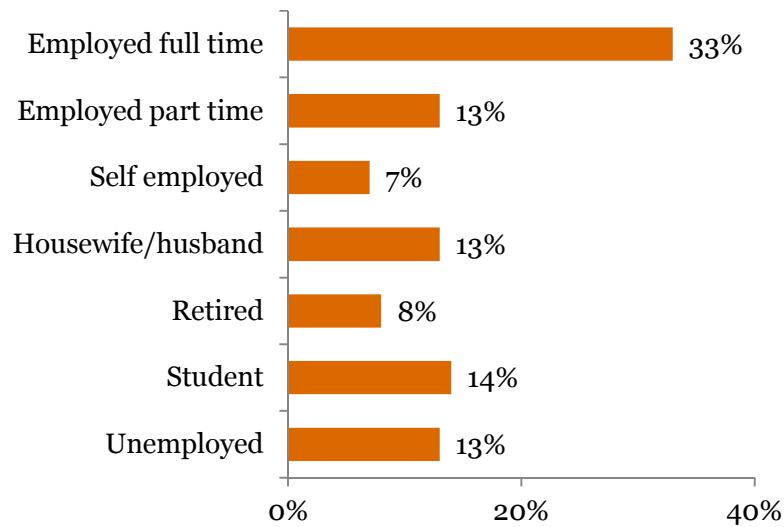
# *Section I - Demographics*

# Demographic profile of respondents – United States (US)

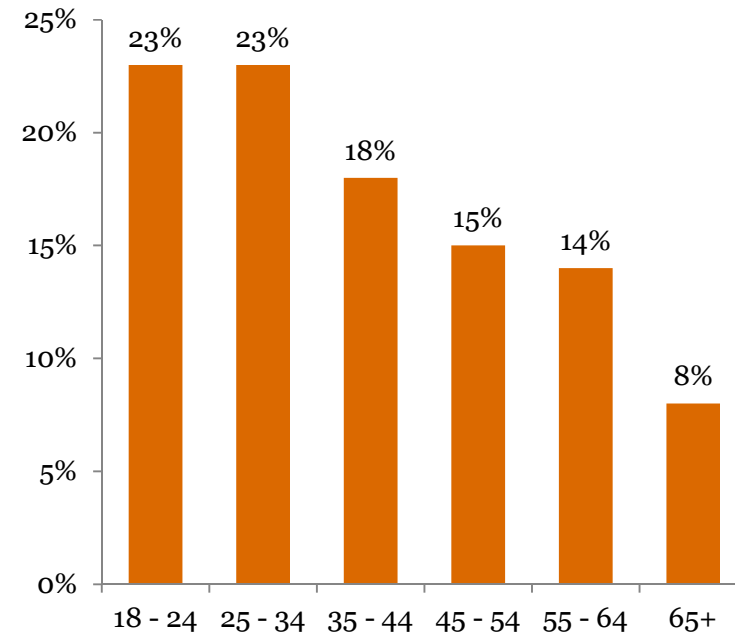
## Gender



## Employment Status



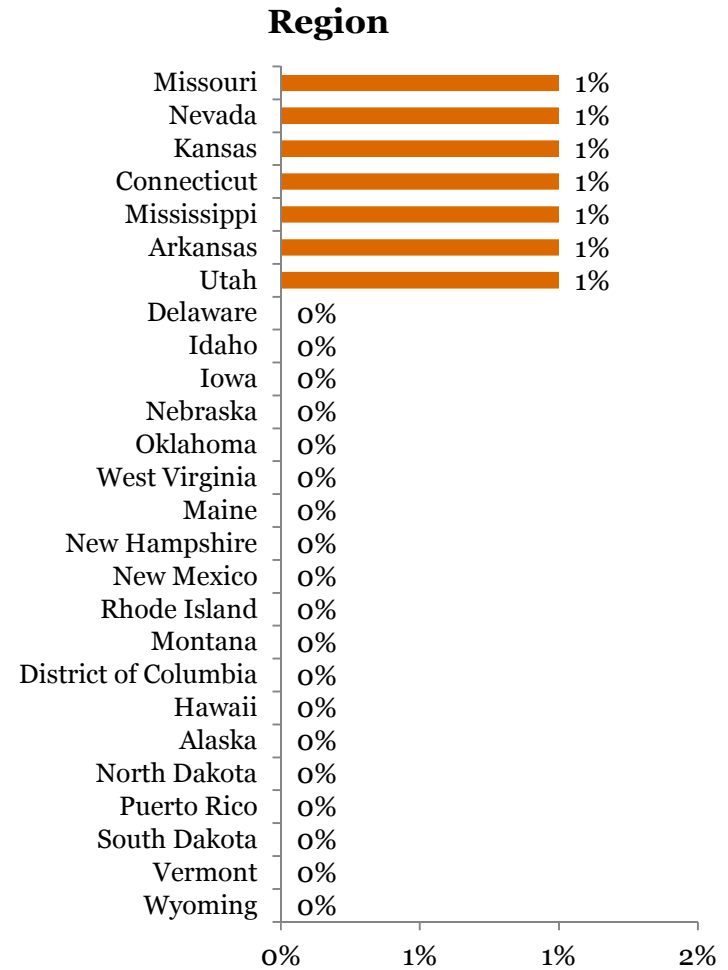
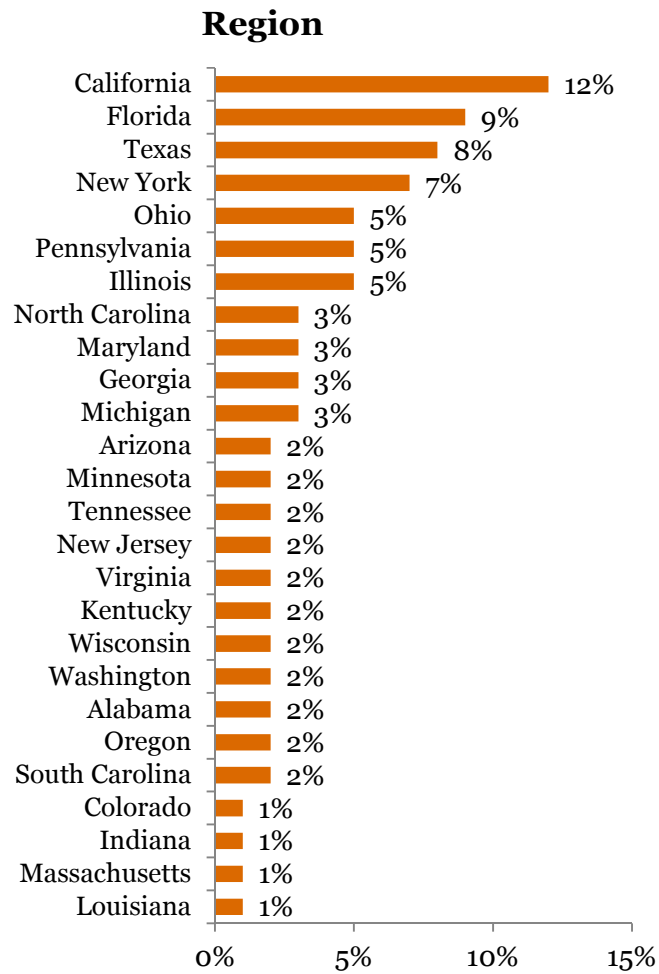
## Age



Base: 1011



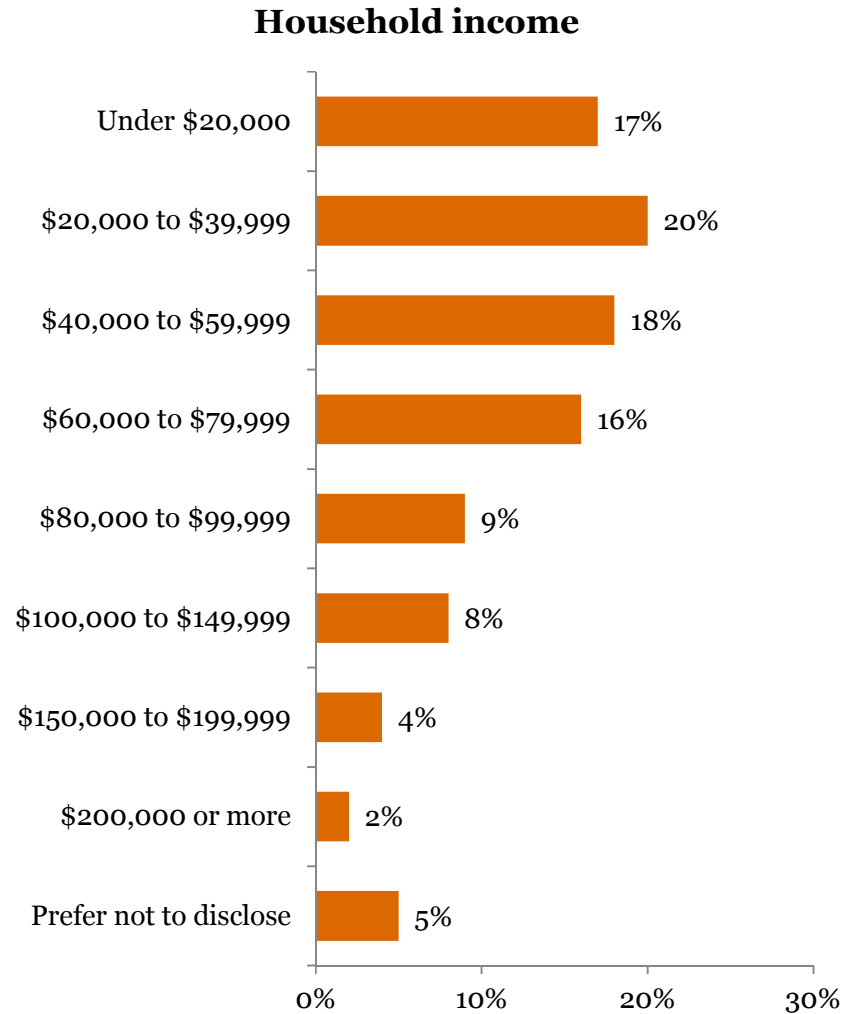
# Region breakdown – United States (US)



Base: 1011

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## Household income breakdown - United States (US)



Base: 1011

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## *Section II - Buying behaviours*

Q6. On average, how often do you buy products online?

Q7. How long since you made your first ever online purchase?

Q8. Why do you buy products online instead of in-store?

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

Q10. Have you ever intentionally browsed products at a store, but decided to purchase them online?

Q10b. What factors influenced your decision to intentionally browse products in-store then purchase those products online?

Q11. Have you ever intentionally browsed products online but decided to purchase them in-store?

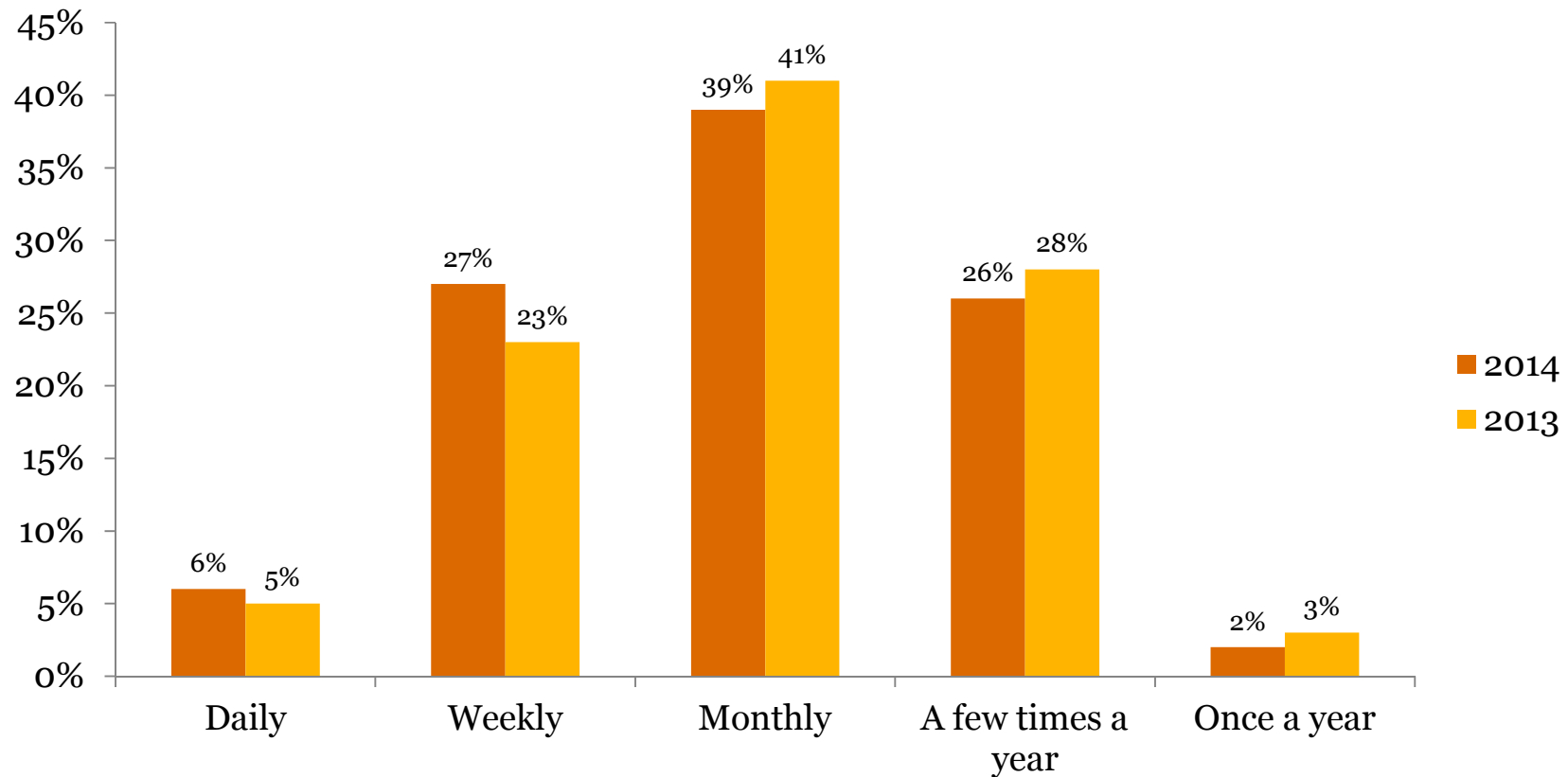
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Q11b. What factors influenced your decision to intentionally browse products online then purchase those products in-store?

Q12. Which of the following in-store technologies would make your shopping experience better?

Q13. How often do you buy products using the following shopping channels?

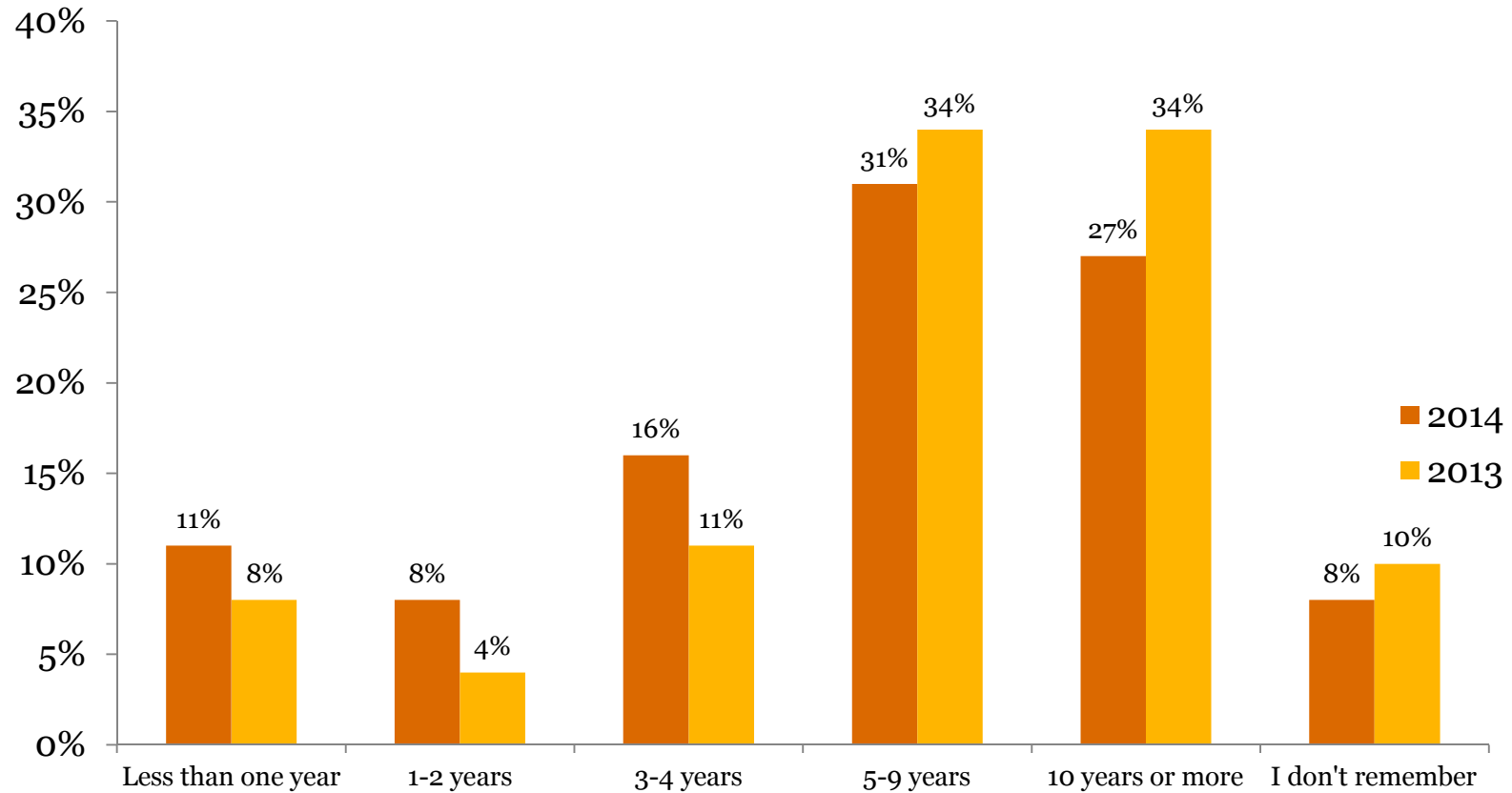
## Q6. On average, how often do you buy products online?



Please note: 40 respondents said they never shop online

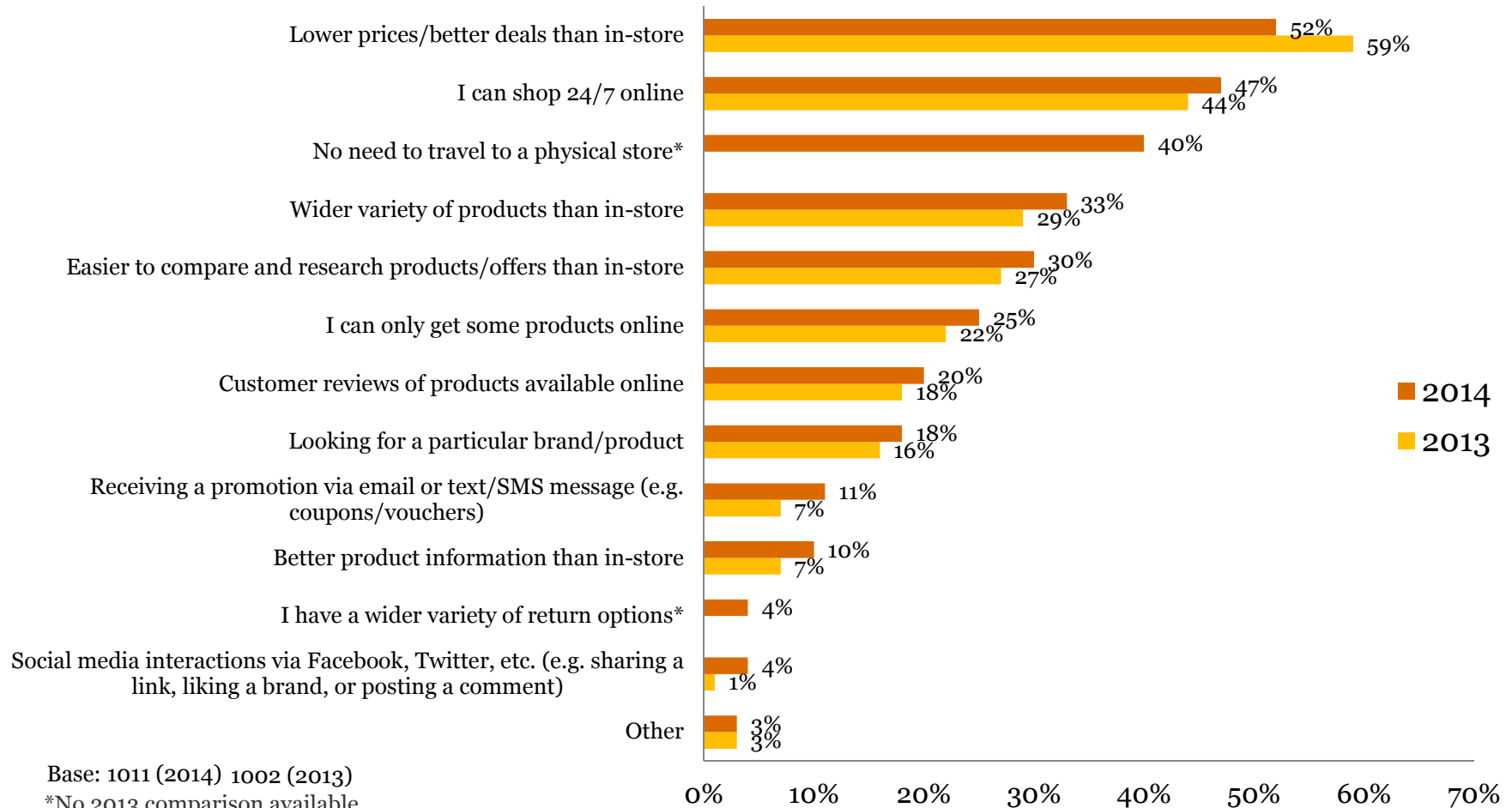
Base: 1011 (2014) 1002 (2013)

## Q7. How long since you made your first ever online purchase?



Base: 1011 (2014) 1000 (2013)

## Q8. Why do you buy products online instead of in-store?

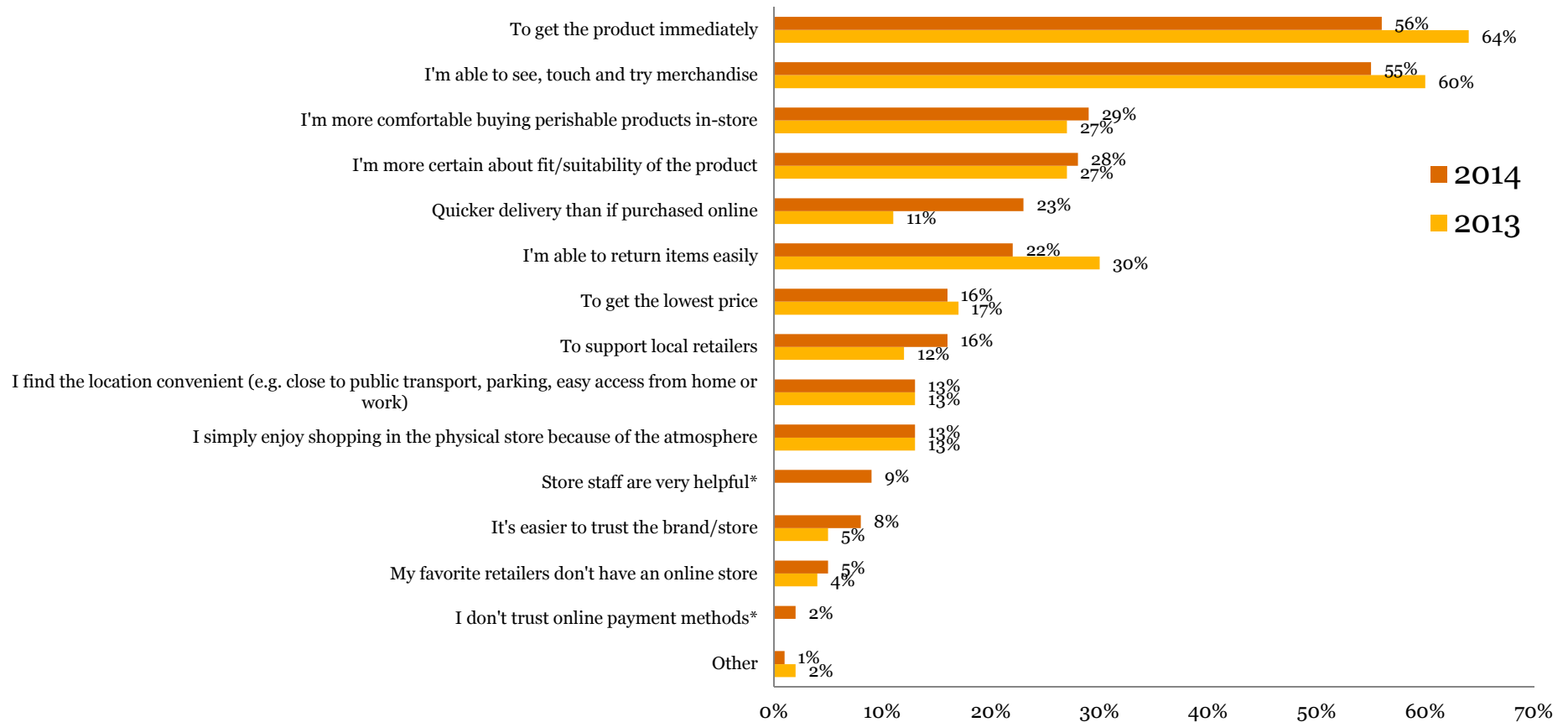


Base: 1011 (2014) 1002 (2013)

\*No 2013 comparison available

Note: Respondents had to rank their THREE most important factors.

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



Base: 1011 (2014) 1042 (2013)

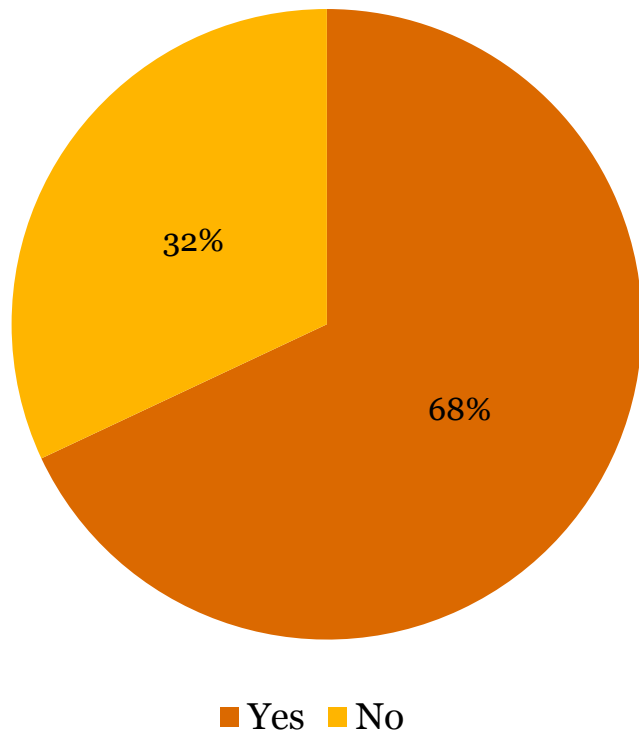
Note: Respondents had to rank their THREE most important factors. Please approach 2013 comparisons with caution due to slight wording variations.

\*No 2013 comparison available

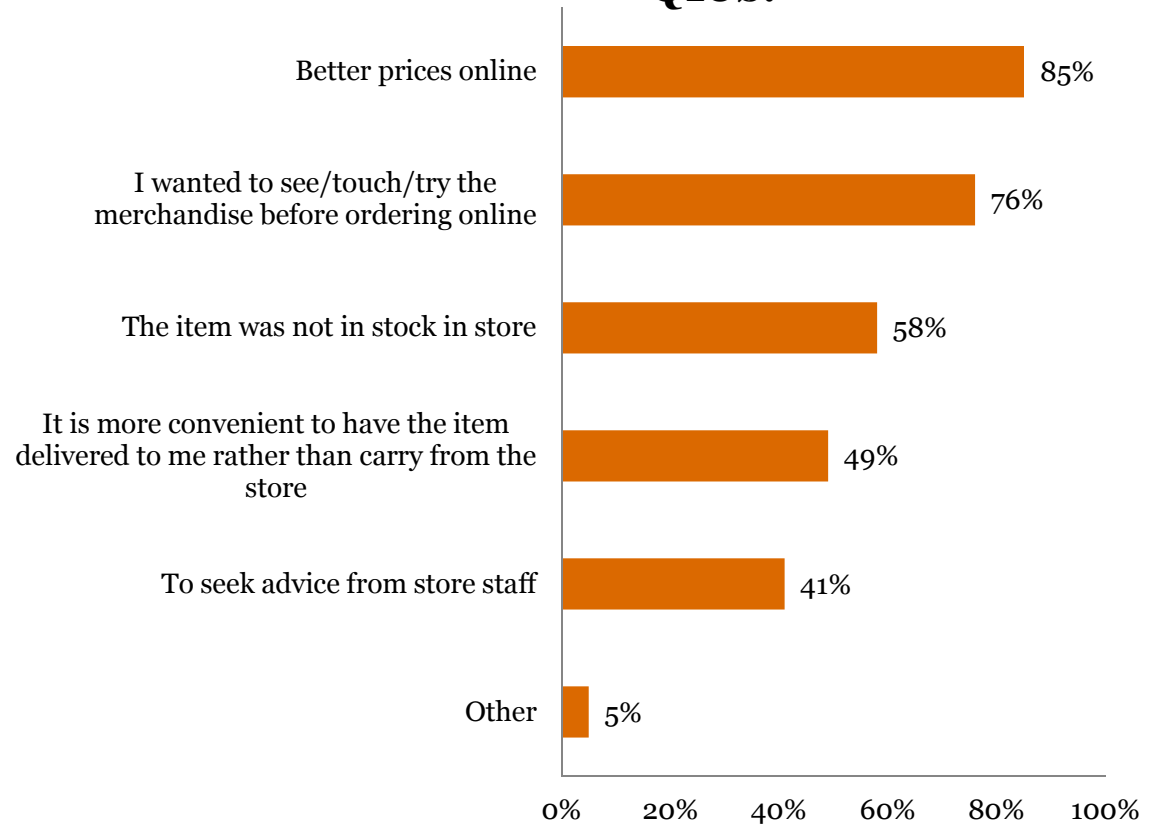


**Q10 & Q10b. Have you ever intentionally browsed products at a store but decided to purchase them online? What factors influenced your decision?**

Q10.



Q10b.



Base: 1011

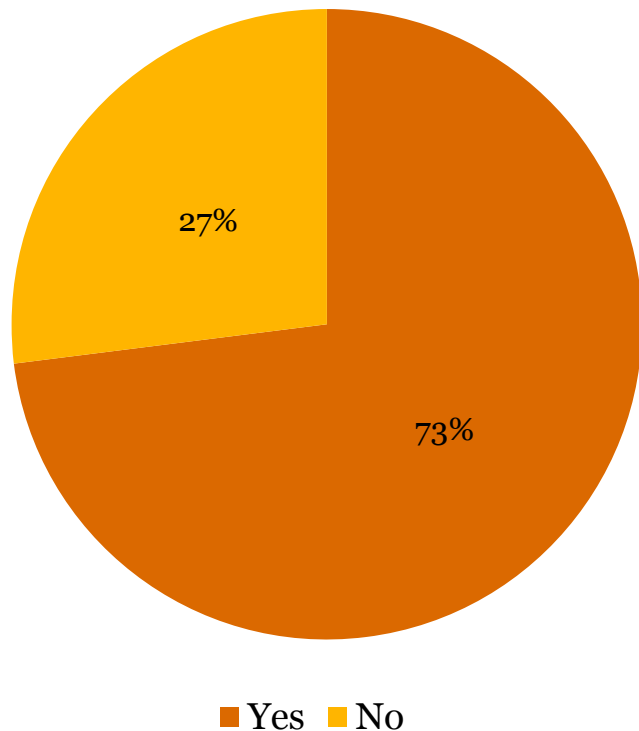
PwC

Note: Question only asked to those who said 'Yes' at Q10  
Base: 684

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**Q11 & Q11b. Have you ever intentionally browsed products online but decided to purchase them in-store? What factors influenced your decision?**

**Q11.**



**Q11b.**



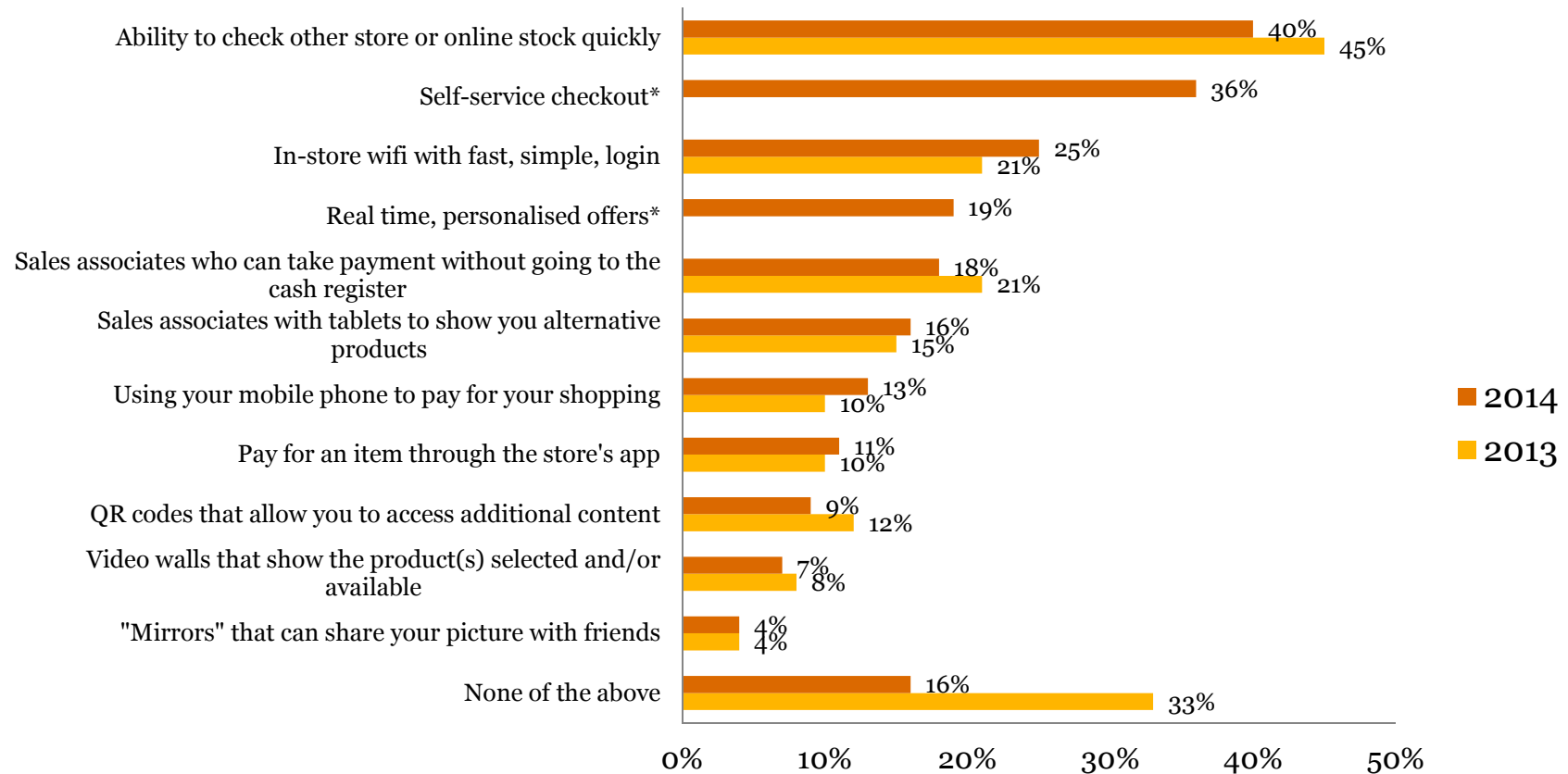
Base: 1011

PwC

Note: Question only asked to those who said 'Yes' at Q11  
Base: 734

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## Q12. Which of the following in-store technologies would make your shopping experience better?

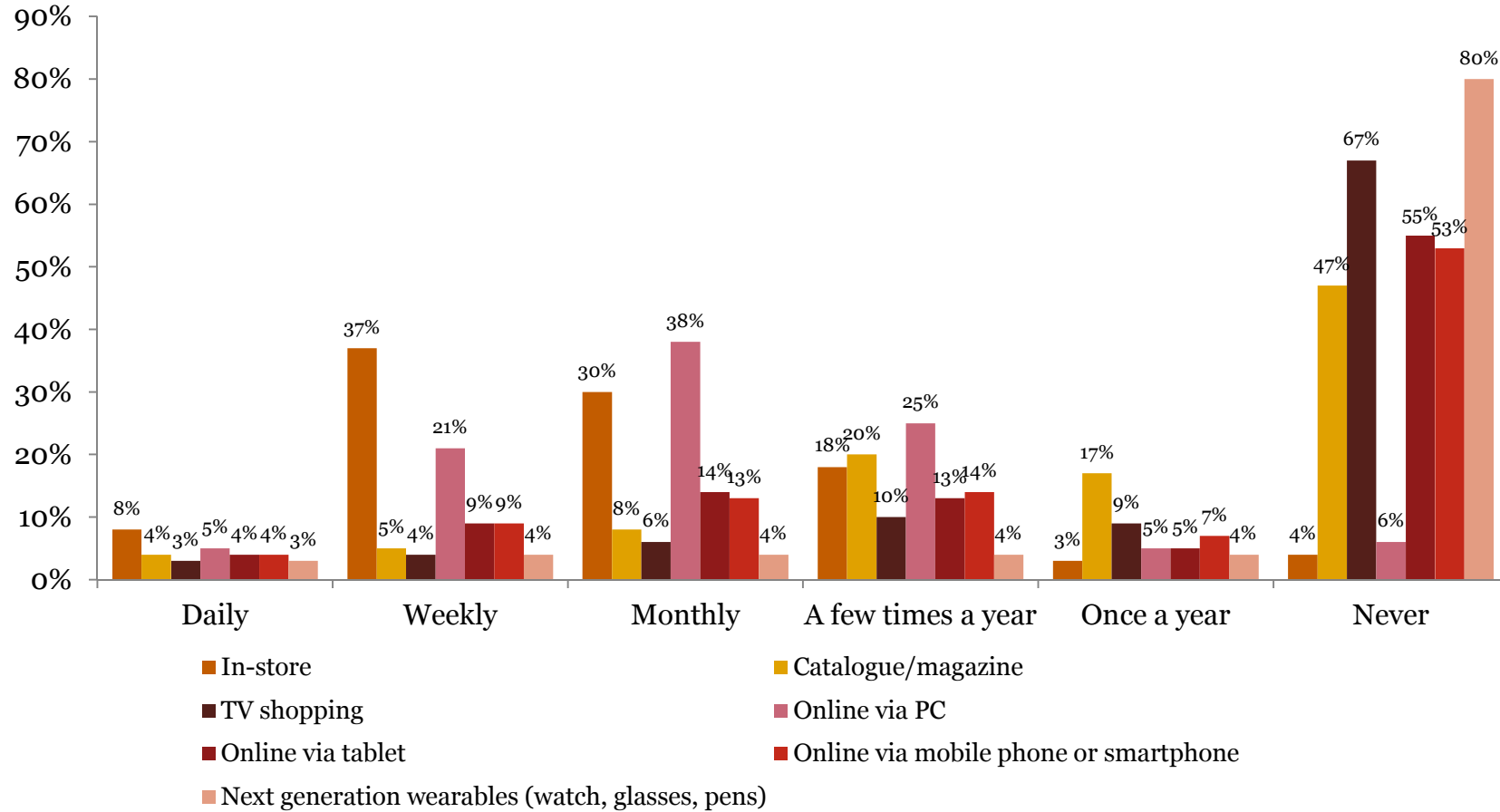


Base: 1011 (2014) 1002 (2013)

\*No 2013 comparison available

Note: Respondents were asked to select up to THREE options.

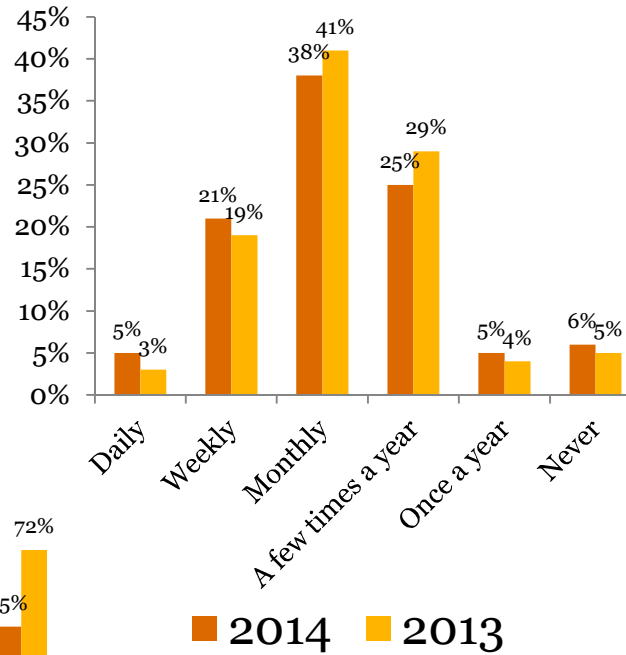
## Q13. How often do you buy products using the following shopping channels?



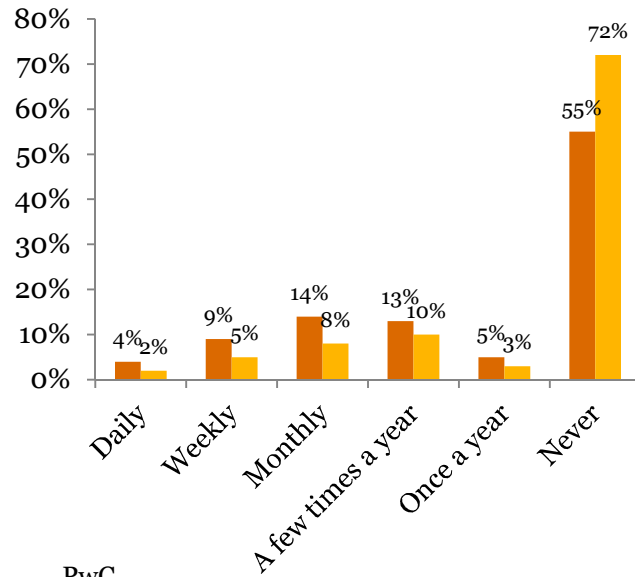
Note: The definition provided for next generation wearables in the survey was (e.g. Google glass).

## Q13. Spotlight on online channels...

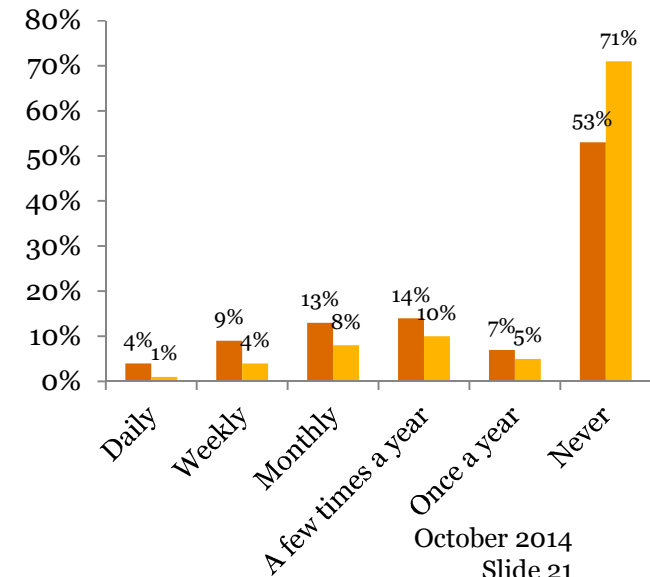
### PC



### Tablet



### Mobile/smartphone



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## *Section III - Social media shopping*

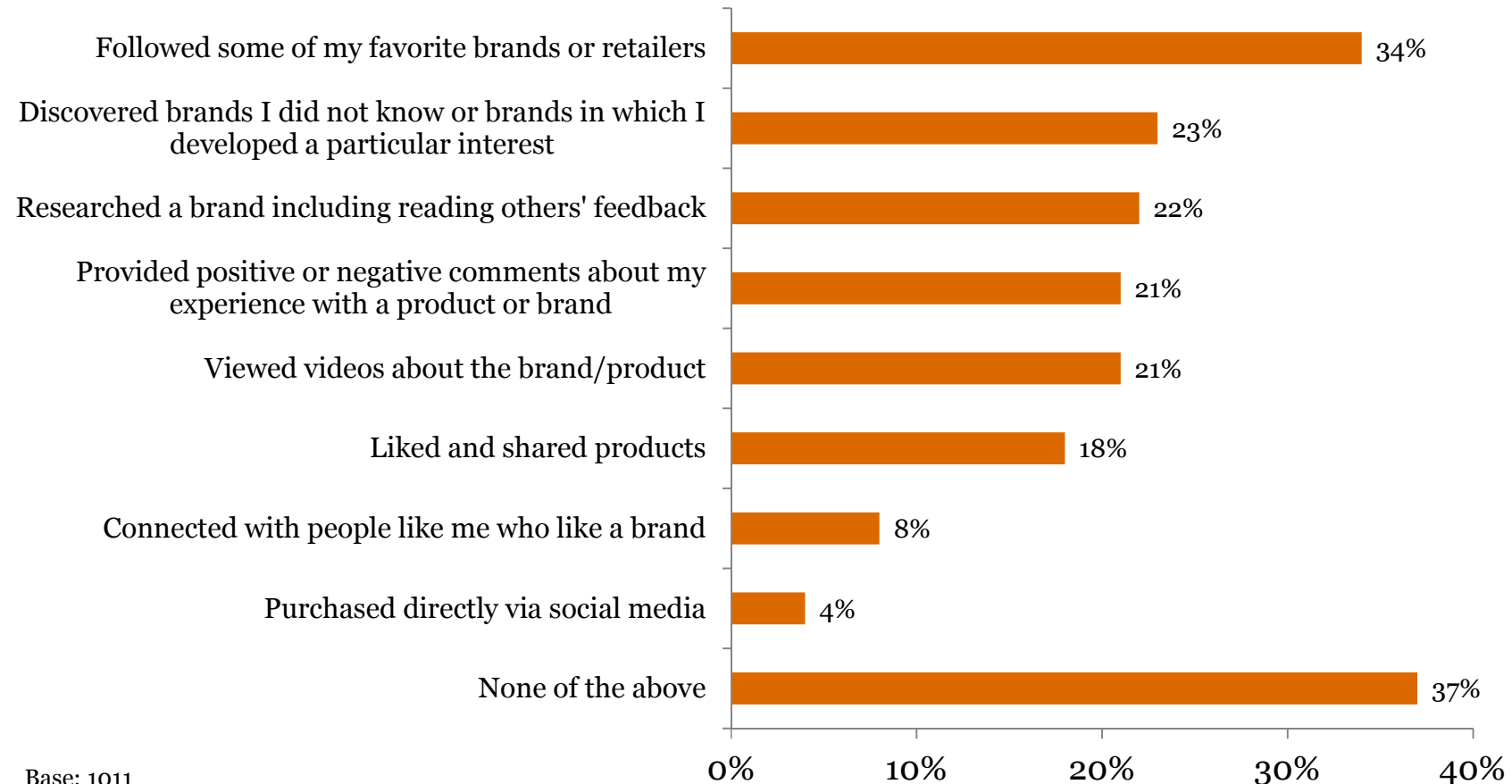
Q14. Which of the following have you done using social media...

Q14b. Has any interaction you have had with your favorite brands on social media driven you to buy more?

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

Q16. Which social media do you regularly use as part of your shopping experience?

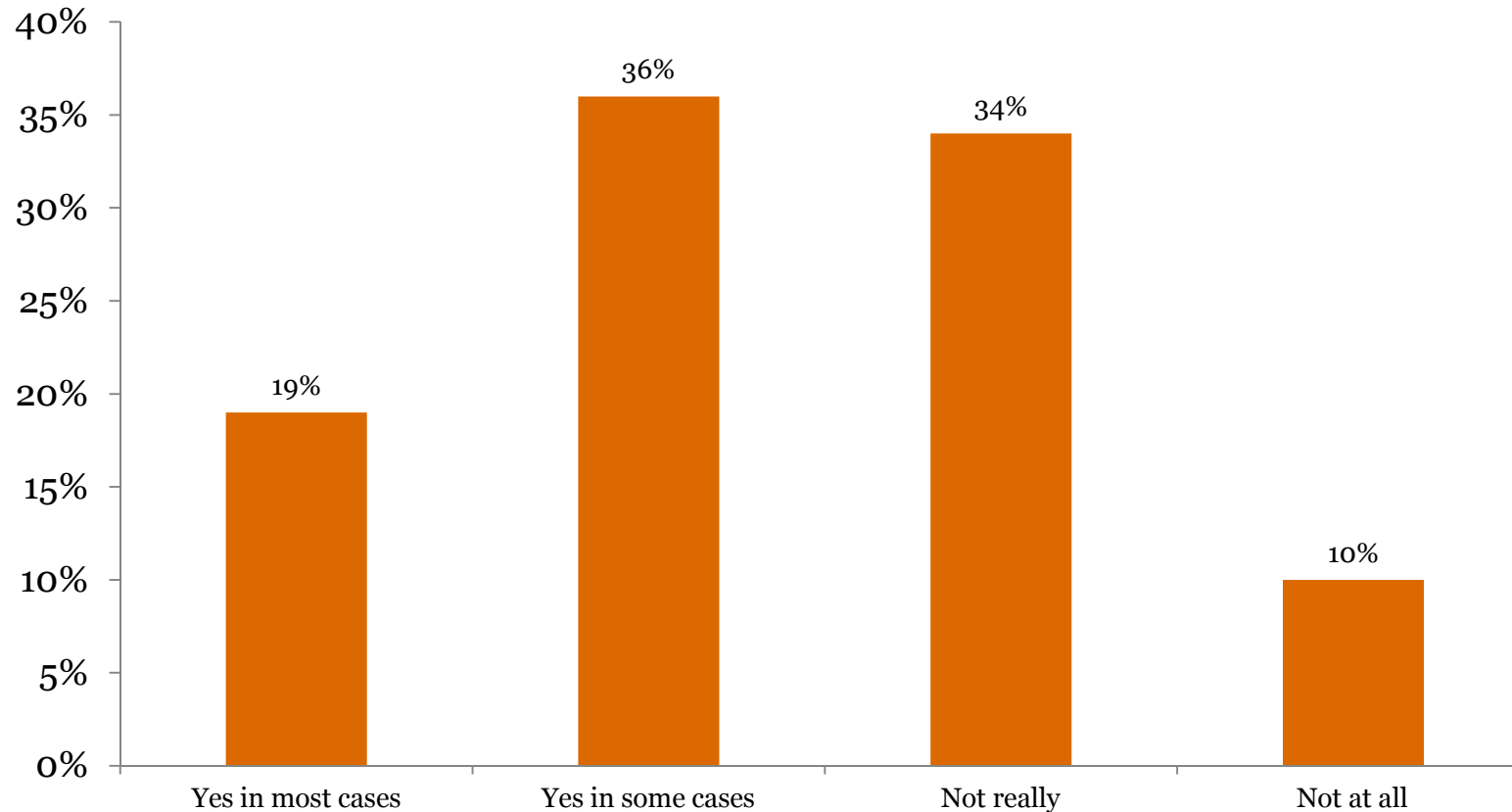
## Q14. Which of the following have you done using social media...



Base: 1011

Note: Respondents were asked to select up to THREE options.

## ***Q14b. Has any interaction you have had with your favorite brands on social media driven you to buy more?***

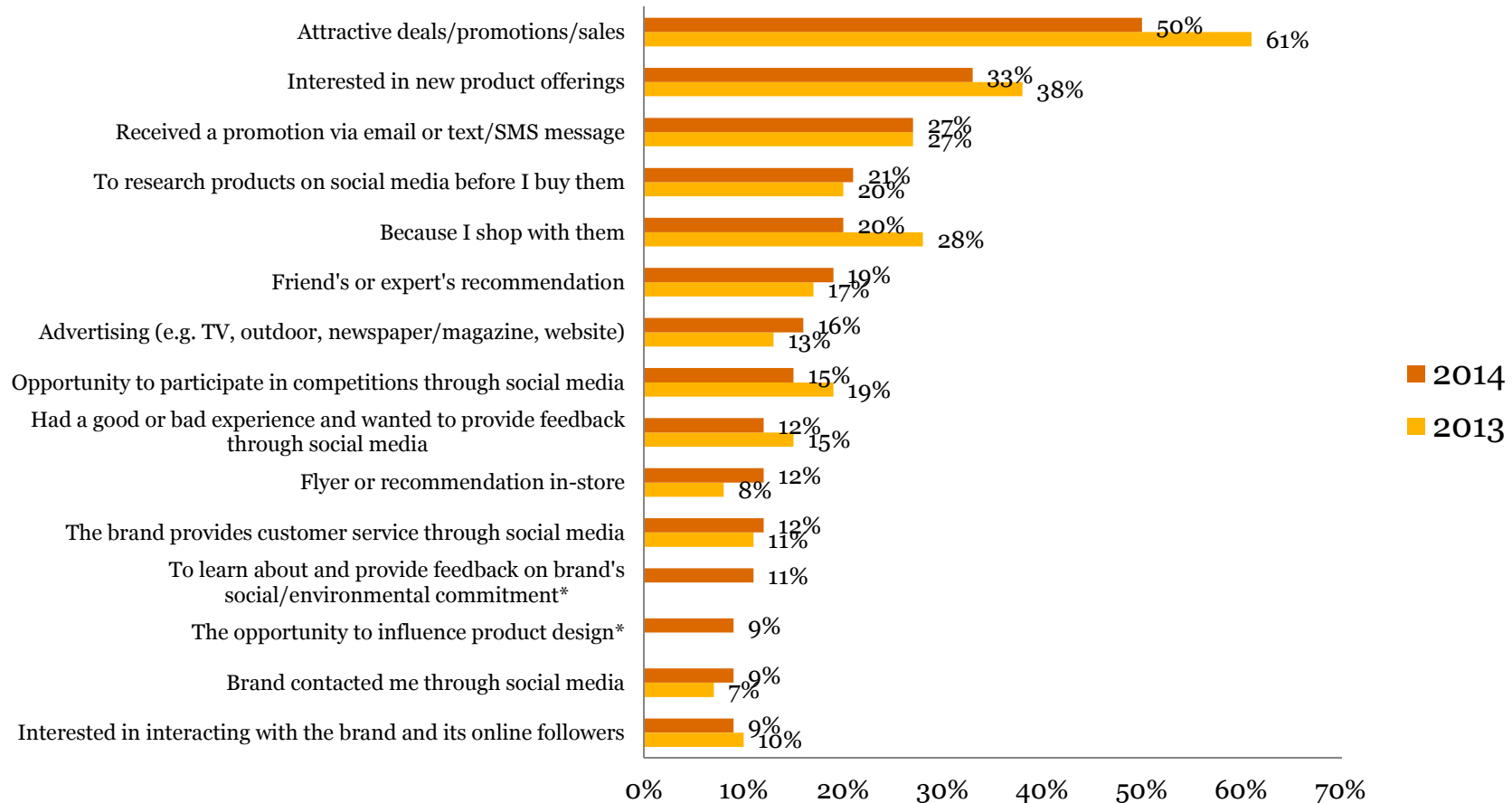


Base: 634

Note: Question asked to respondents who selected anything other than 'None of the above' at Q14.



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

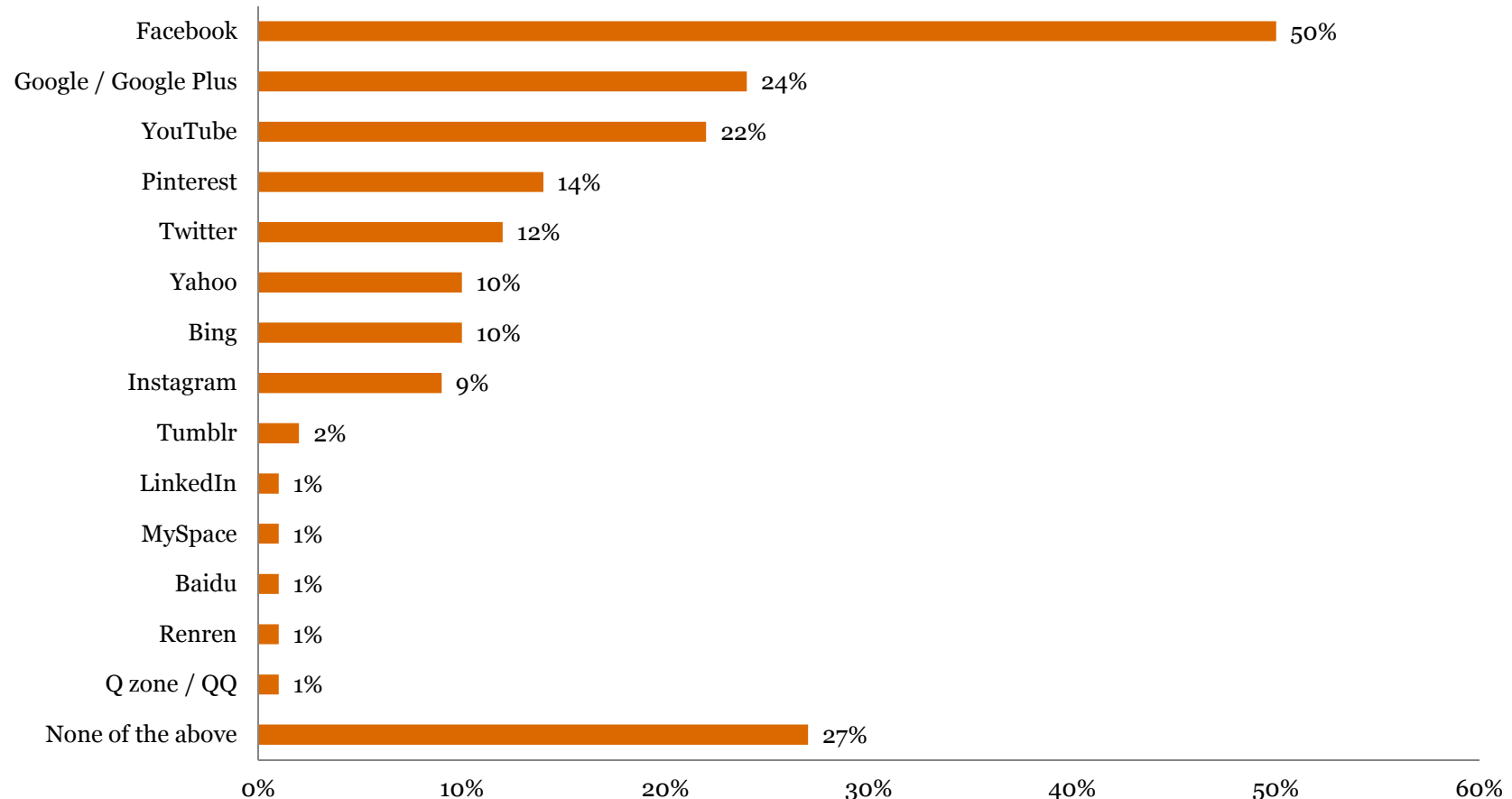


Base: 937 (2014) 562 (2013)

\*No 2013 comparison available.

Note: Respondents had to rank their THREE most important factors.

## Q16. Which social media do you regularly use as part of your shopping experience?



Base: 1011

Note: Respondents were asked to select up to THREE options.

Note: Take caution when making comparisons as some options are not used globally.

Note: We have only shown options selected by United States (US) respondents.

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## *Section IV - Mobile shopping/Payment methods*

Q17. Which of the following have you done using your mobile/smartphone/tablet/pc?

Q18. Why don't you use your mobile/smartphone/tablet/pc for shopping?

Q19. Which payment method do you prefer?

Q20. So-called “digital” or “virtual” currencies such as Bitcoin could enable users to pay for products and services electronically without using the local established currency. Up until now, have you been aware of these types of currencies?

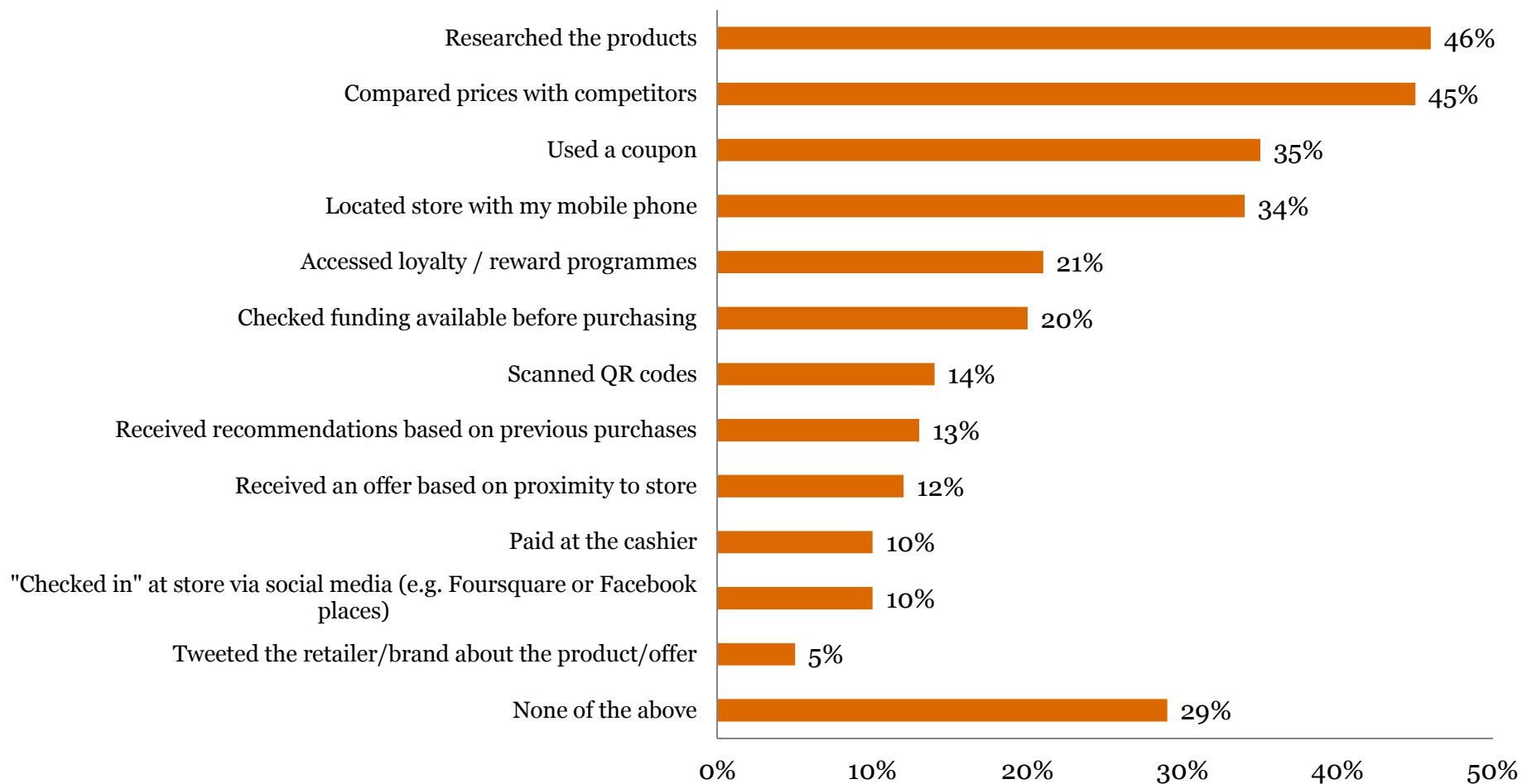
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Q21. Could you see yourself using such a digital currency in the future?

Q22. Please indicate how strongly you agree or disagree with the following statements:

- I am wary of having my personal credit information hacked using my mobile phone
- My mobile phone will become my main tool for which to purchase items
- I am willing to load credit onto my mobile phone to provide payment for products
- I am happy to receive offers or coupons via my mobile phone
- I am happy for stores to establish my location through my mobile phone
- I am happy to store my payment and delivery information in an app on my mobile phone

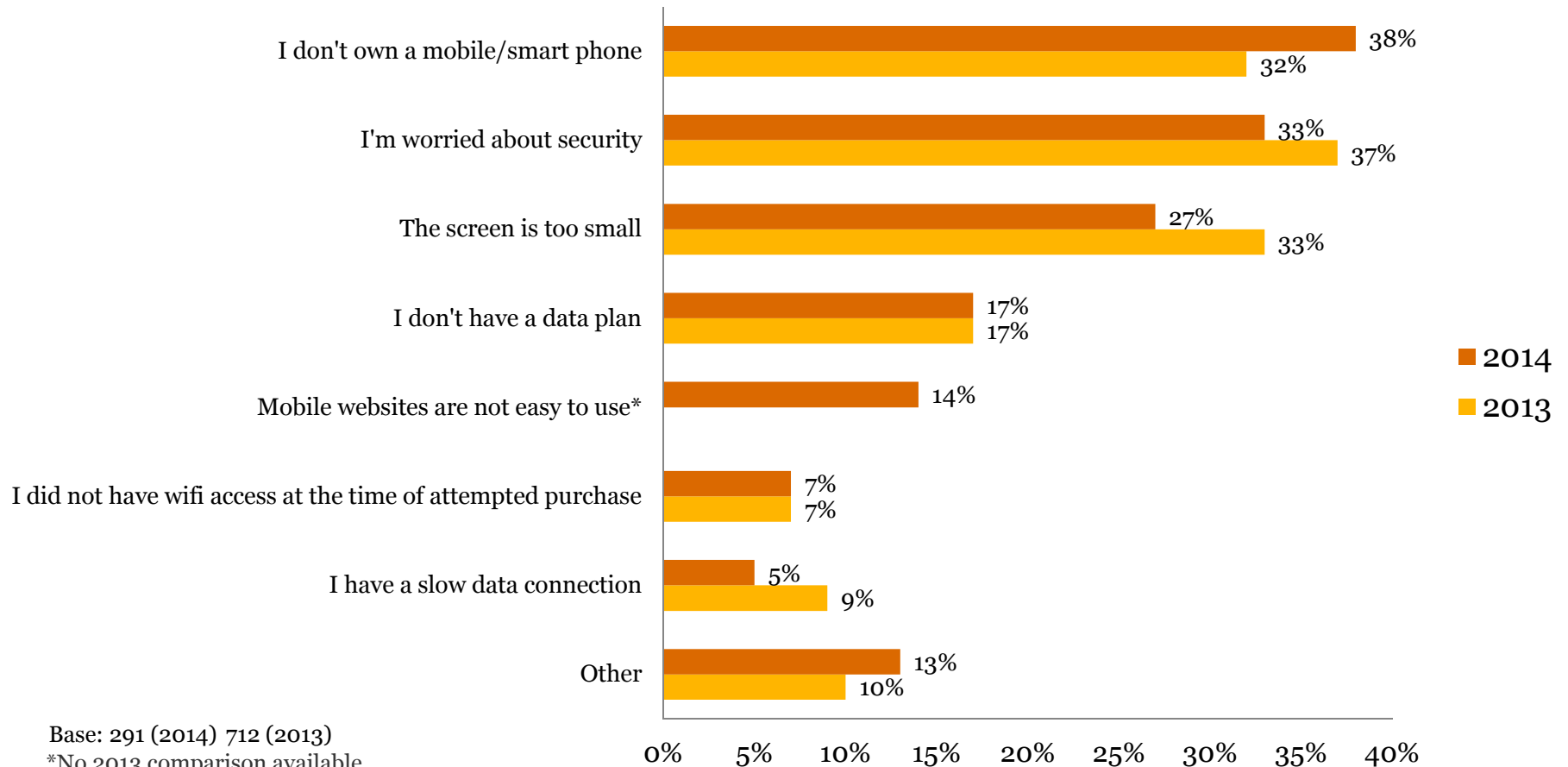
## Q17. Which of the following have you done using your mobile/smartphone/tablet/pc?



Base: 1011

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# Q18. Why don't you use your mobile/smartphone/tablet/pc for shopping?



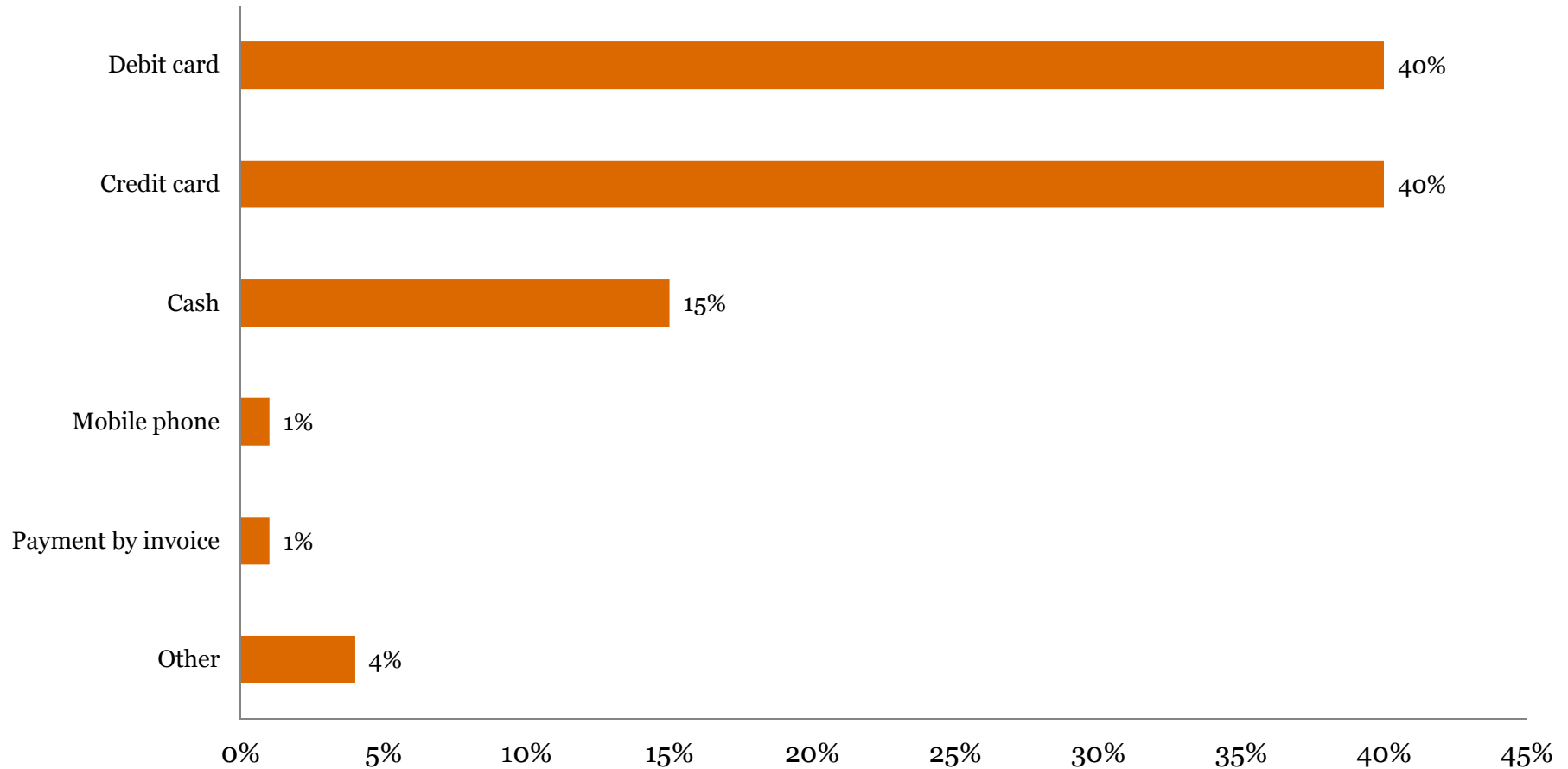
Base: 291 (2014) 712 (2013)

\*No 2013 comparison available.

Note: Respondents were asked to select up to THREE options.

Note: Question only asked to those who selected 'None of the above' at Q17. Please approach 2013 comparisons with caution due to wording changes in the question.

## Q19. Which payment method do you prefer?

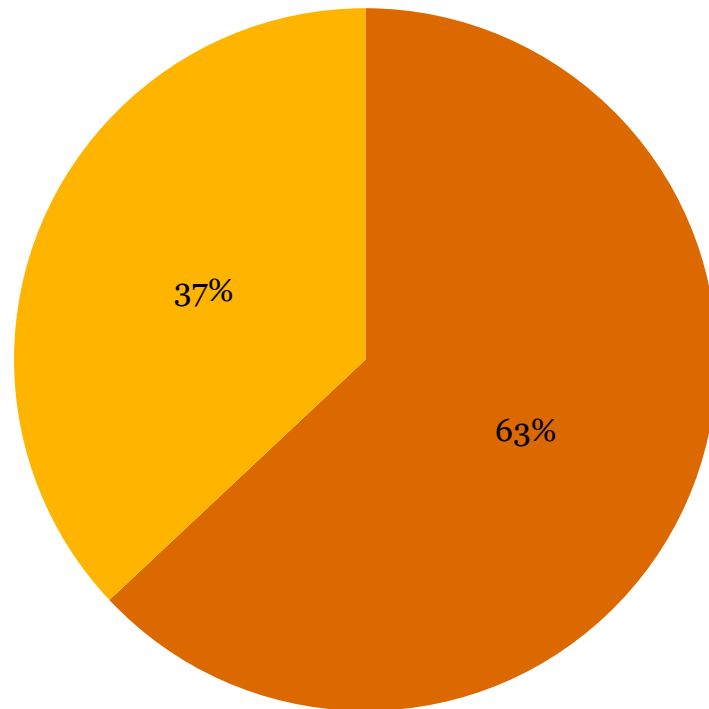


Base: 1011  
Note: Respondents were asked to select ONE option only.

*So called “digital” or “virtual” currencies such as Bitcoin could enable users to pay for products and services electronically without using the local currency.*

**Q20. Up until now, have you been aware of these types of currencies?**

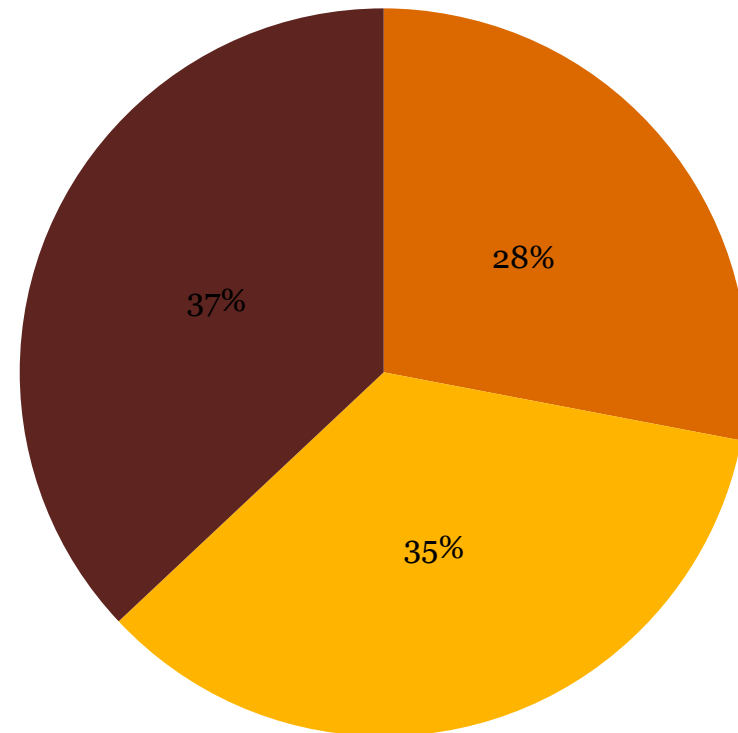
**Q21. Could you see yourself using such a digital currency in the future?**



■ Yes, I was aware of these  
■ No, I was not aware of these

Base: 1011

PwC

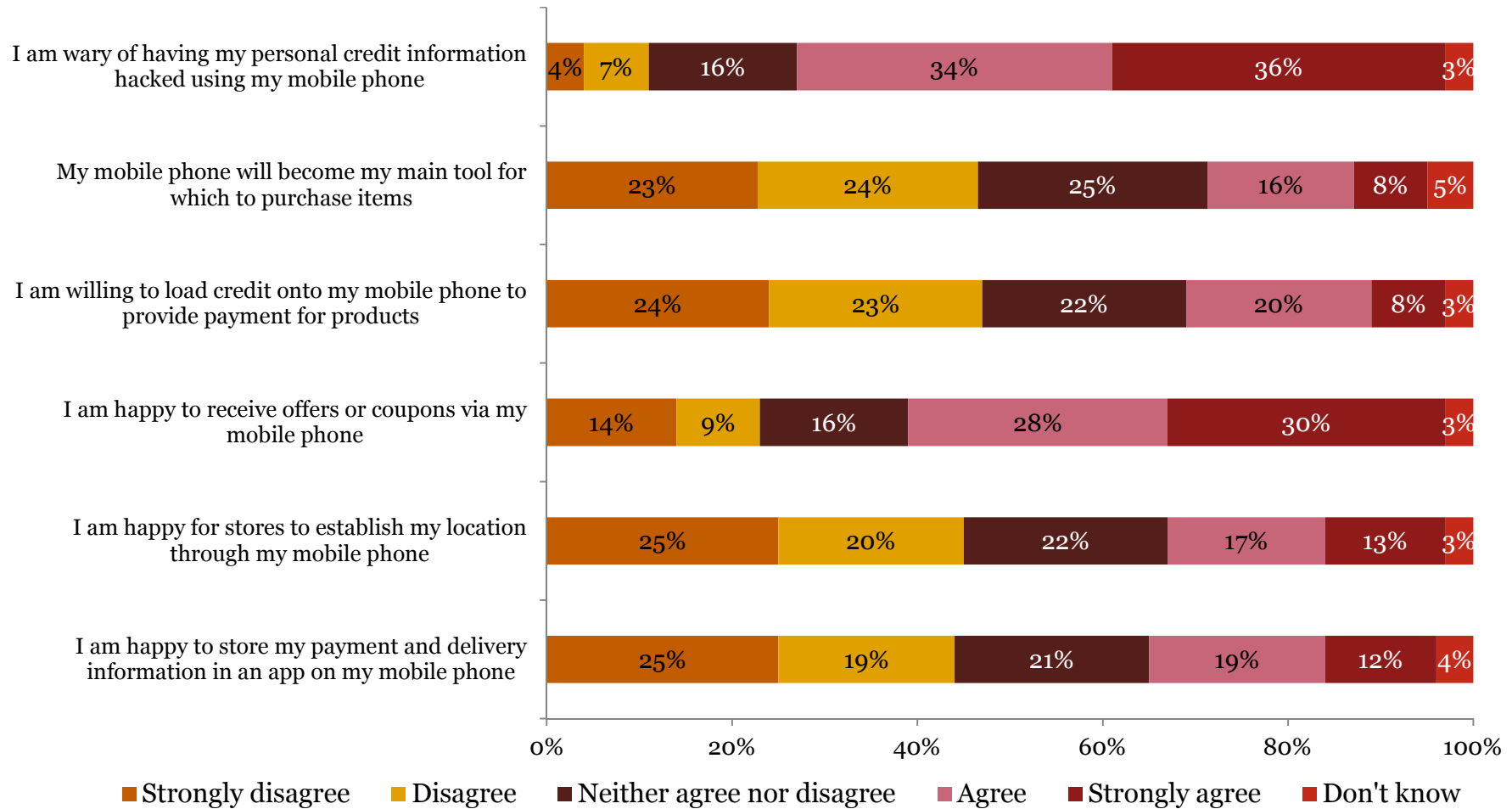


■ Yes ■ No ■ I'm not sure/Don't know

Base: 1011



## Q22. Please indicate how strongly you agree or disagree with the following statements?



Base: 1011

PwC

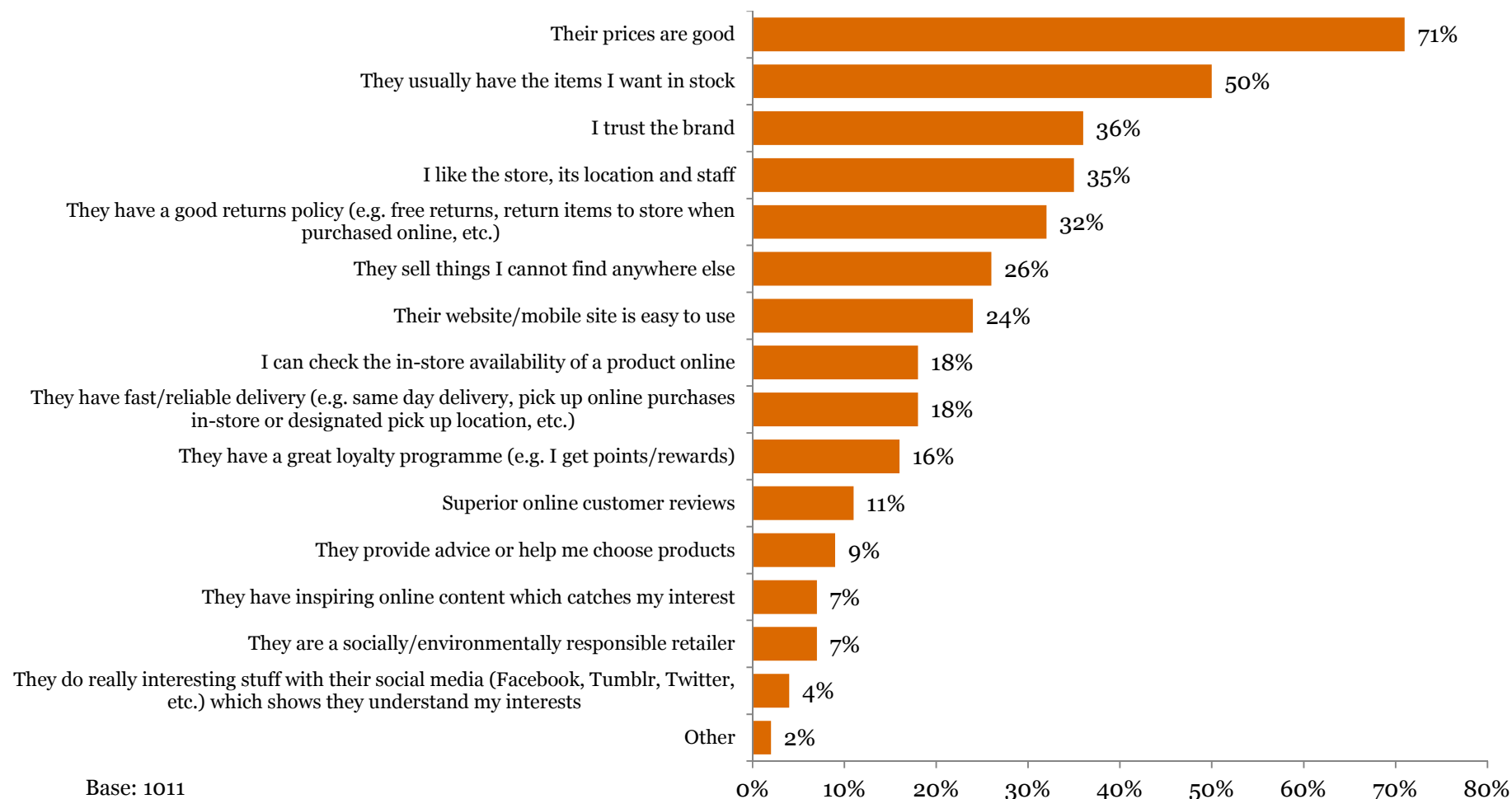
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## *Section V – Your favorite retailers*

Q23. Thinking of your favorite retailer, why do you shop here?

Q24. Thinking of your favorite retailer, please specify if you have purchased something through the following shopping channels.

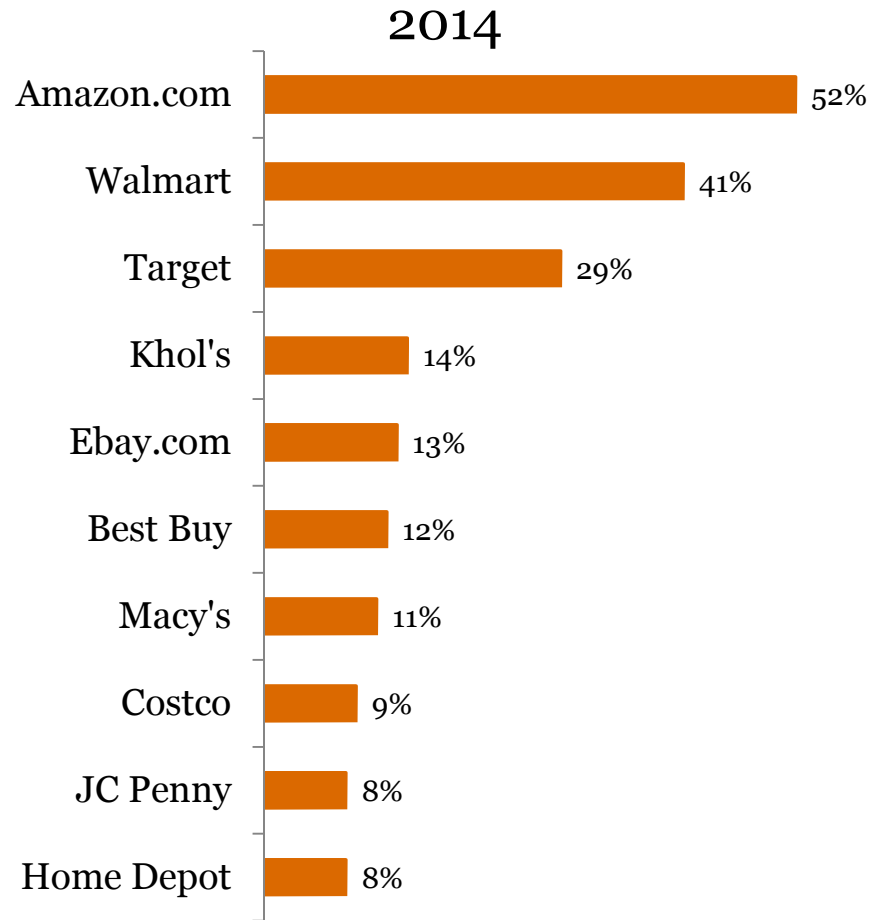
## Q23. Thinking of your favorite retailer, why do you shop here?



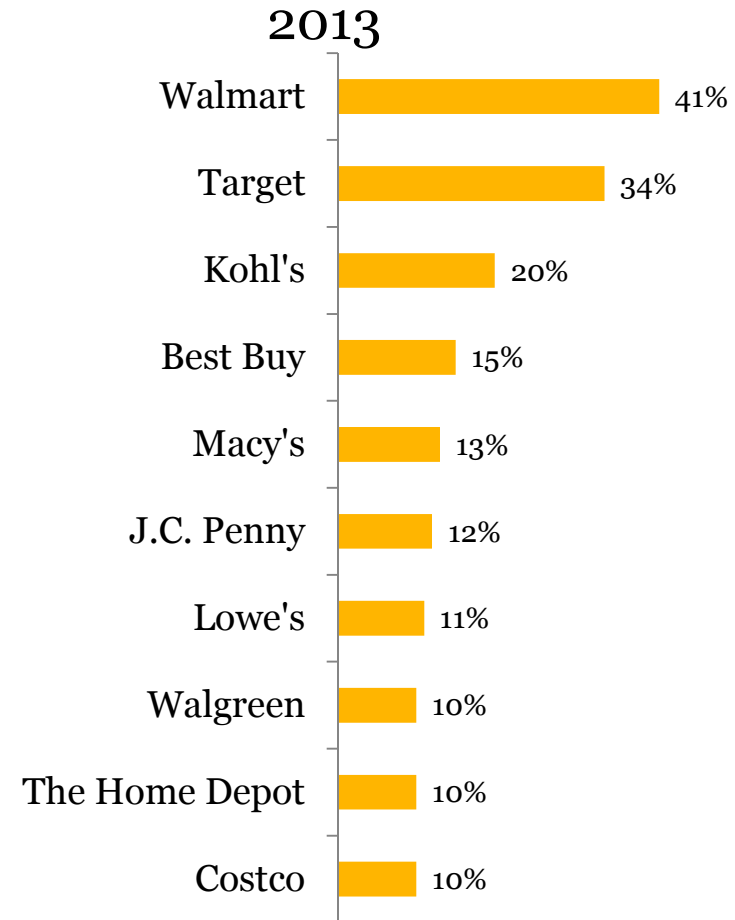
Base: 1011

Note: Respondents were asked to select up to FIVE options.

## Q23c. Please select your top three favorite retailers? (top 10 mentioned)

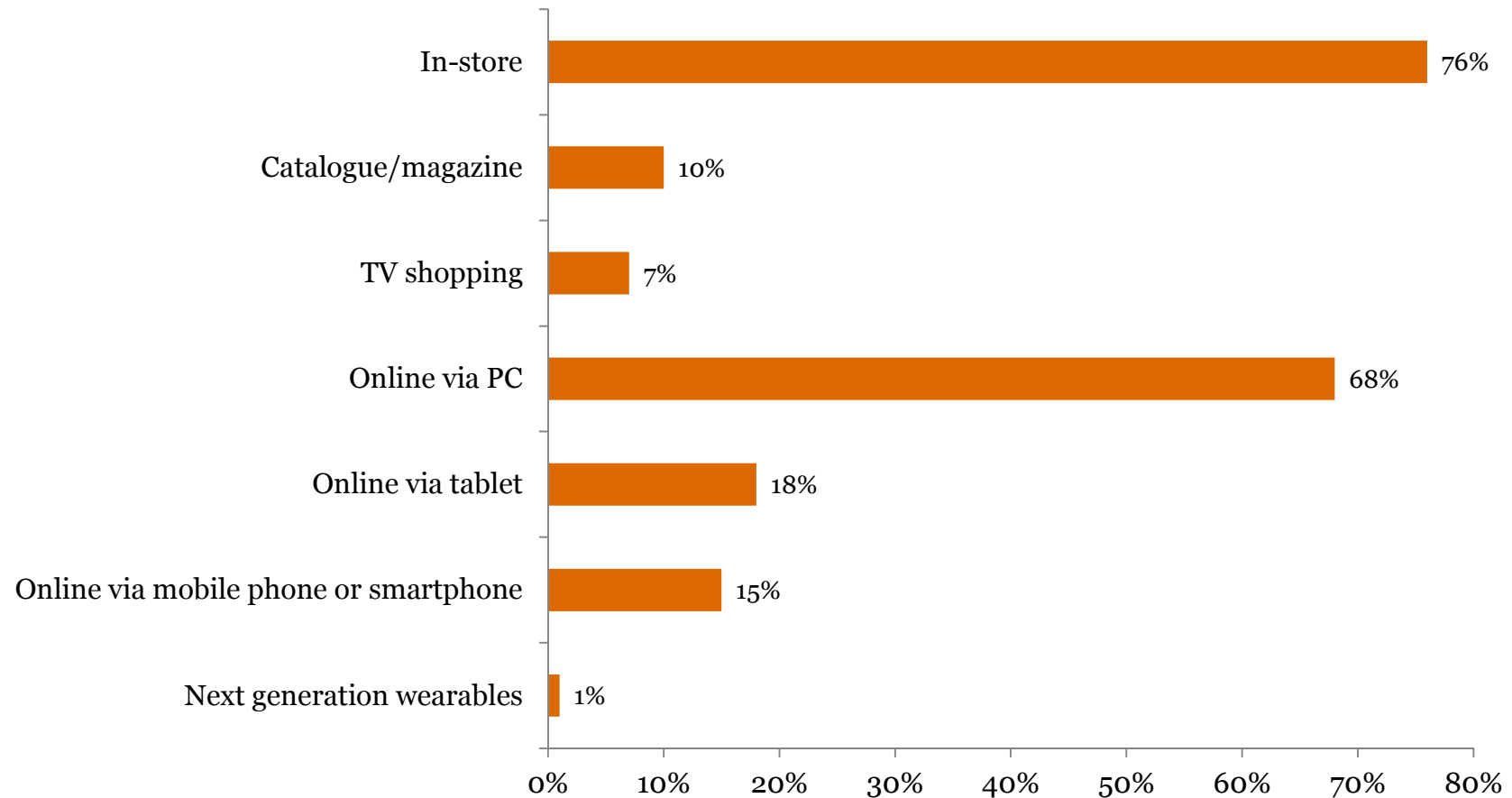


Base: 1011  
 Note: Please approach 2013 comparisons with caution, as 2014 question used a combined list of retailers and pure players  
 PwC



Base: 993

**Q24. Thinking of your favorite retailer, please specify if you have purchased something through the following shopping channels.**



Base: 1011

PwC

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## *Section VI - The purchase journey*

Q25. What's your FIRST step in researching a purchase?

Q26. Which method do you most prefer for RESEARCHING your purchases in each of the following product categories?

Q27. Which method would you most prefer for BUYING your purchases?

Q28. Today, product manufacturers are increasingly offering products directly to consumers, bypassing retailers. Thinking about your online purchases, does it matter to you whether you purchase from a traditional retailer or a product manufacturer?

Q29. Thinking about your last online purchase, did you buy from...

Q30. If you bypassed a retailer for your last online purchase, why did you buy directly from the product manufacturer's website?

Q31. Please indicate from which of these product categories you have bought directly from a product manufacturer online.

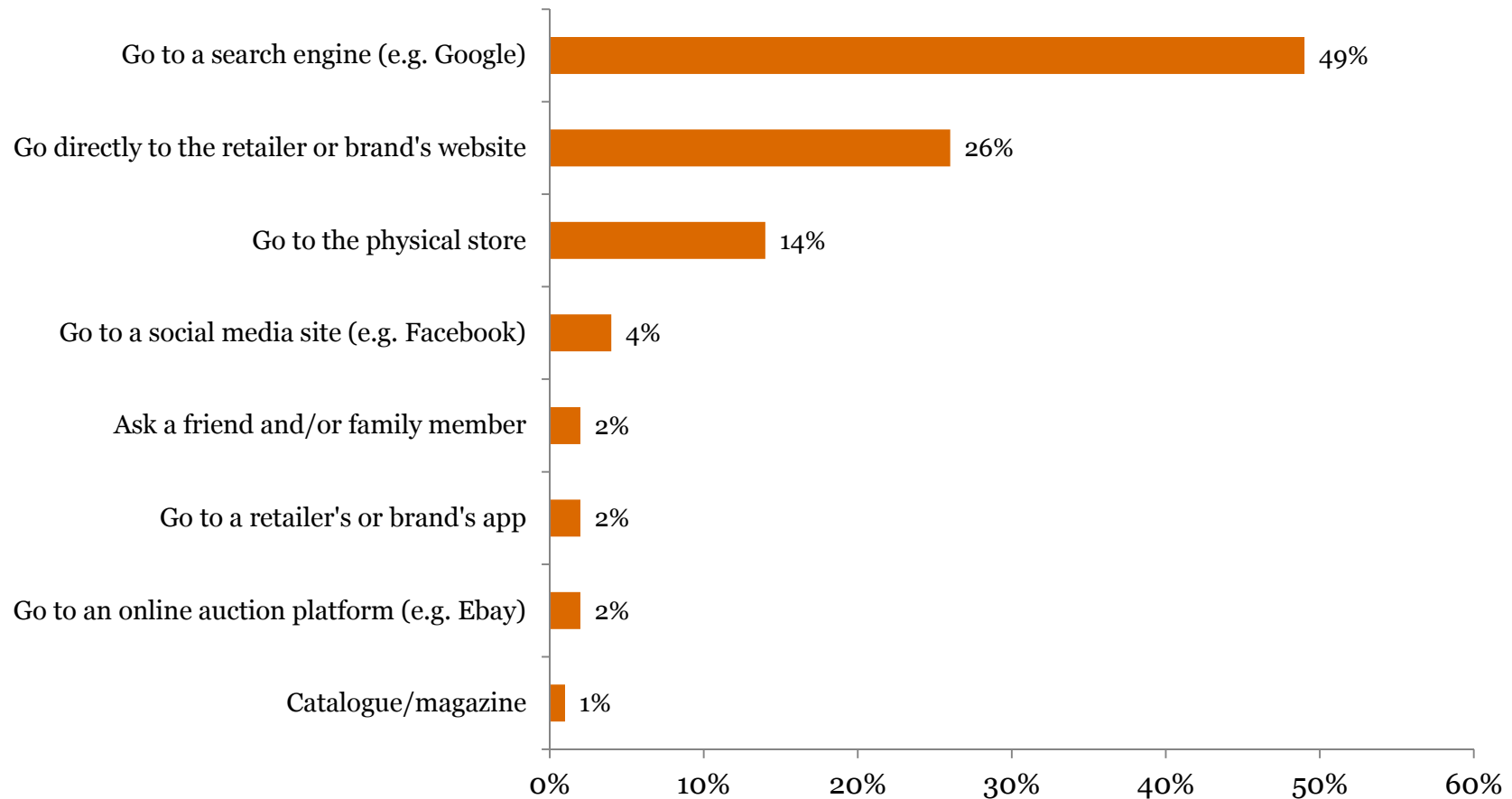
Q32. for each of the following product categories, how many of your purchases have you made online over the least 12 months?

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Q33. Assuming you have free standard delivery, which of the following other delivery options would you be willing to pay for?

Q34. Which are the most important return options for you when making a purchase online?

## Q25. What's your *FIRST* step in researching a purchase?



Base: 1008

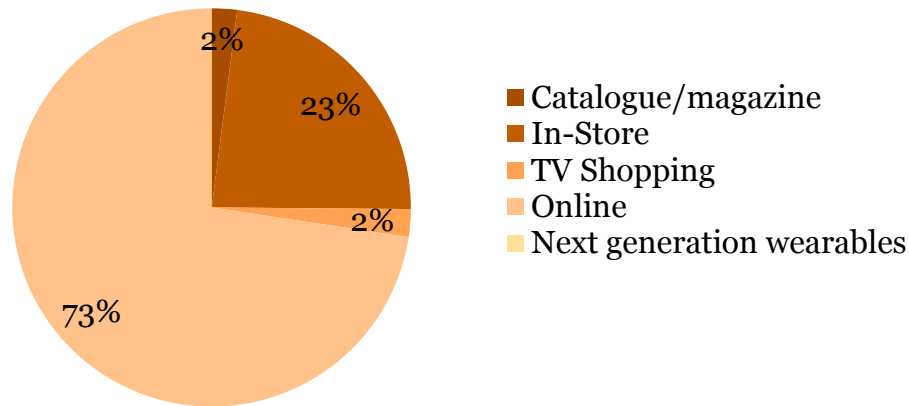
Note: Respondents were asked to select ONE option only.



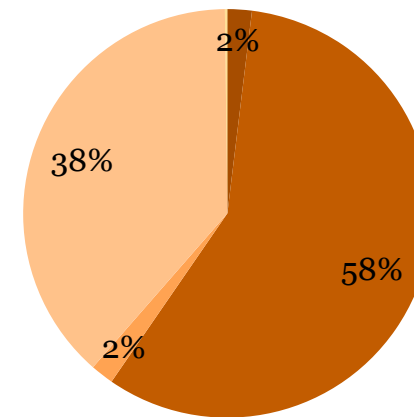
# Consumer electronics and computers

## Preferred shopping methods

Research

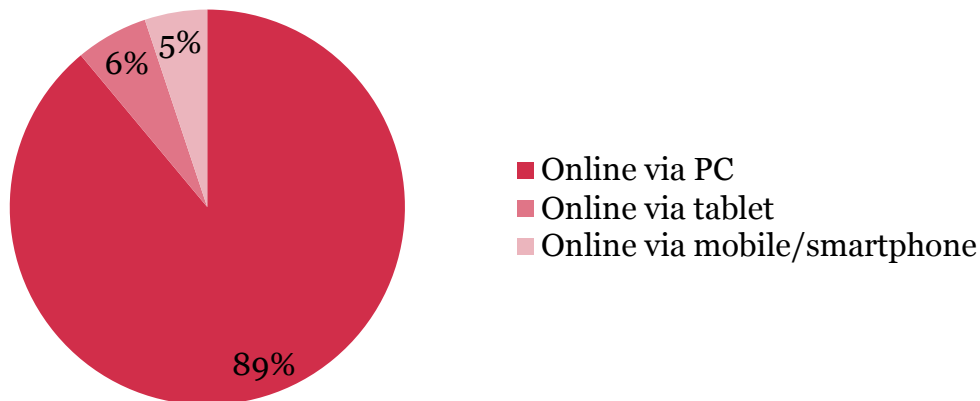


Purchase

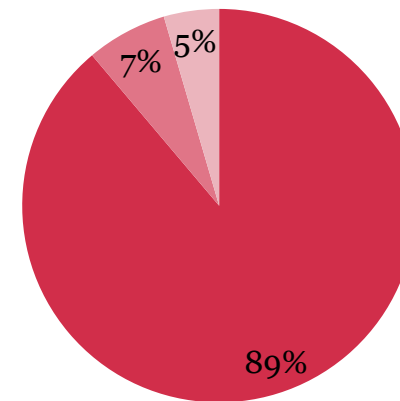


## Online channels breakdown

Research



Purchase

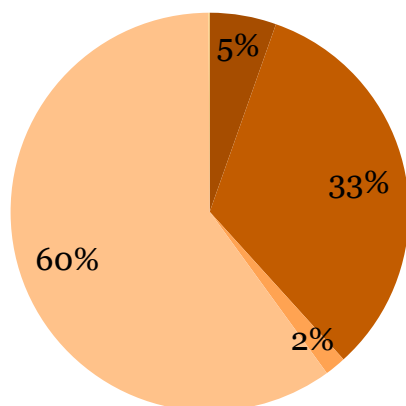


Note: Values in pie charts may total 99 or 101 due to rounding  
PwC

# Household appliances

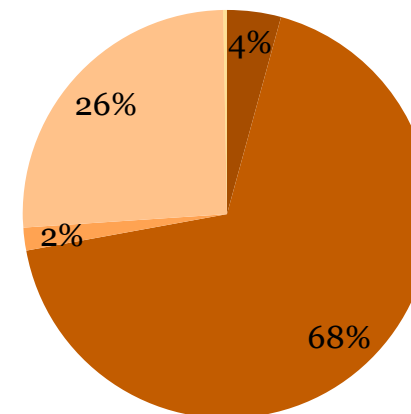
## Preferred shopping methods

Research



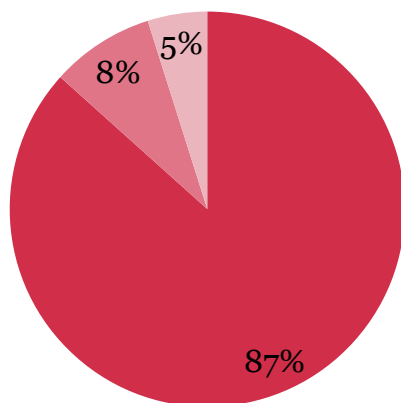
- Catalogue/magazine
- In-Store
- TV Shopping
- Online
- Next generation wearables

Purchase



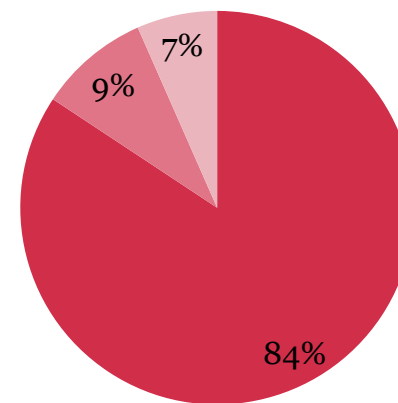
## Online channels breakdown

Research



- Online via PC
- Online via tablet
- Online via mobile/smartphone

Purchase

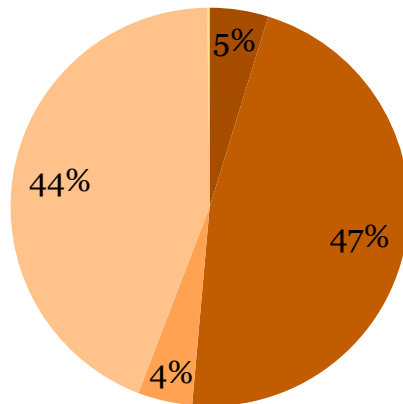


Note: Values in pie charts may total 99 or 101 due to rounding  
PwC

# Clothing and footwear

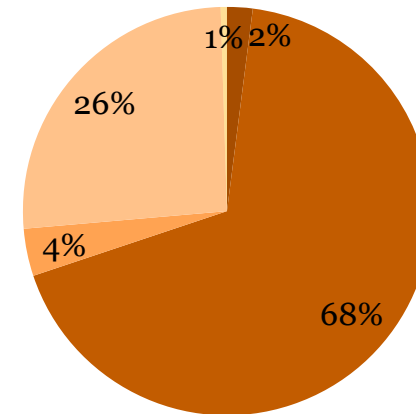
## Preferred shopping methods

Research



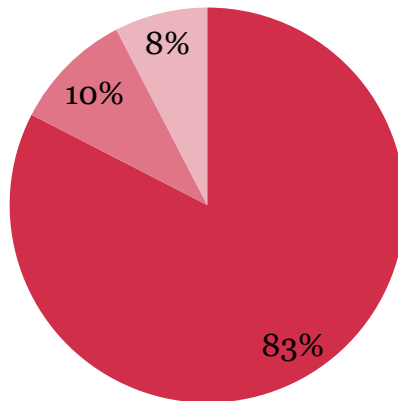
- Catalogue/magazine
- In-Store
- TV Shopping
- Online
- Next generation wearables

Purchase



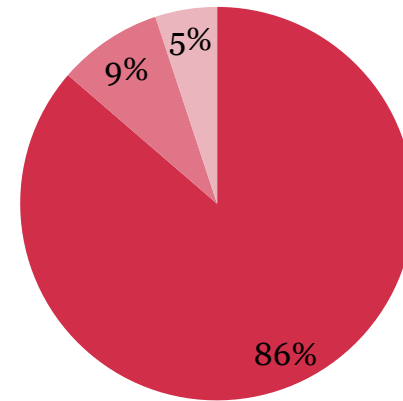
## Online channels breakdown

Research



- Online via PC
- Online via tablet
- Online via mobile/smartphone

Purchase

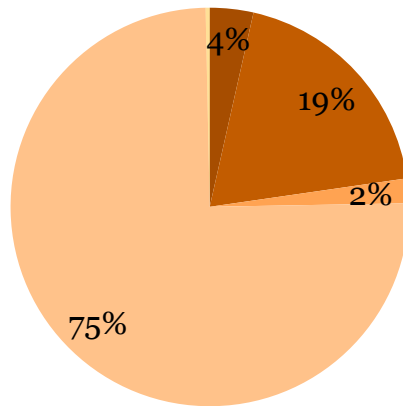


Note: Values in pie charts may total 99 or 101 due to rounding  
PwC

# Books, music, movies and video games

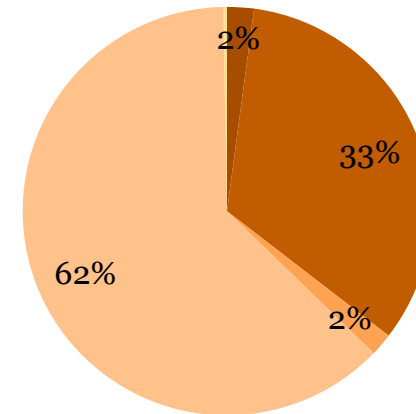
## Preferred shopping methods

Research



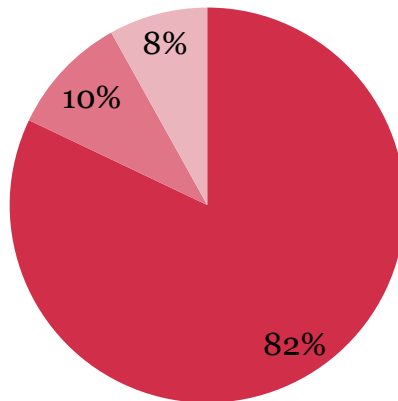
- Catalogue/magazine
- In-Store
- TV Shopping
- Online
- Next generation wearables

Purchase



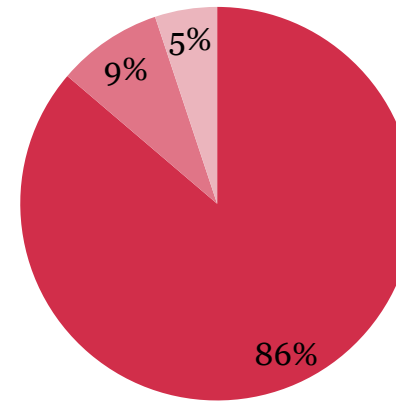
## Online channels breakdown

Research



- Online via PC
- Online via tablet
- Online via mobile/smartphone

Purchase

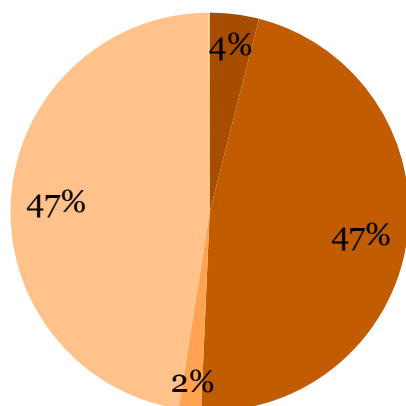


Note: Values in pie charts may total 99 or 101 due to rounding  
PwC

# Furniture and homeware

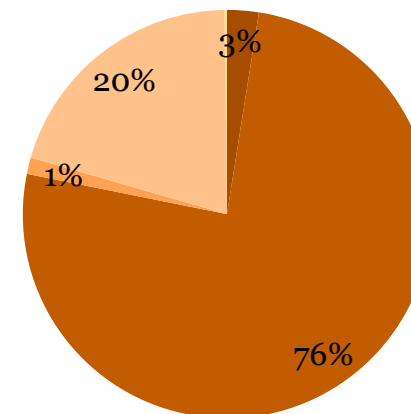
## Preferred shopping methods

Research



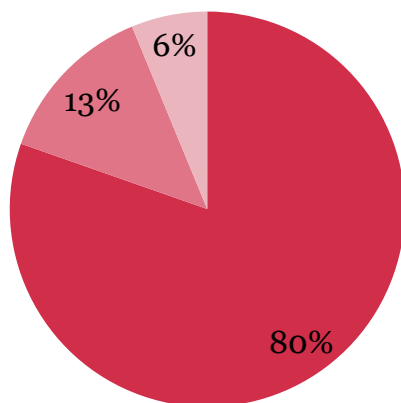
- Catalogue/magazine
- In-Store
- TV Shopping
- Online
- Next generation wearables

Purchase



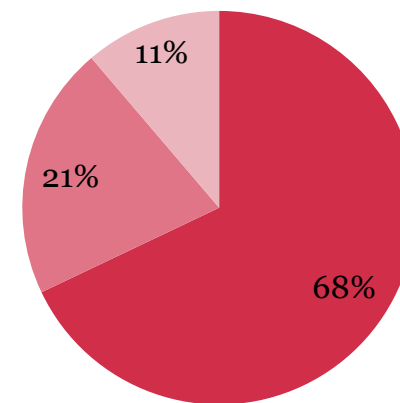
## Online channels breakdown

Research



- Online via PC
- Online via tablet
- Online via mobile/smartphone

Purchase

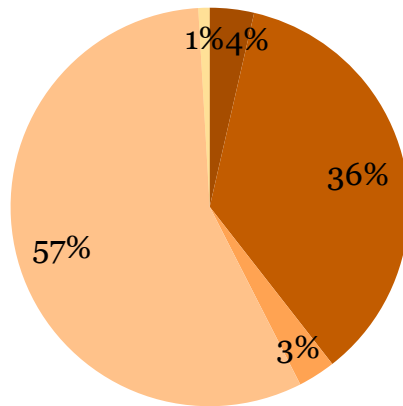


Note: Values in pie charts may total 99 or 101 due to rounding  
PwC

# Sports equipment/outdoor

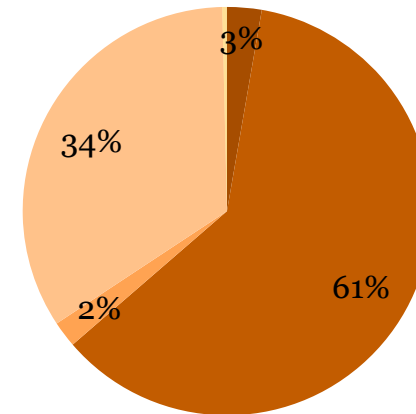
## Preferred shopping methods

Research



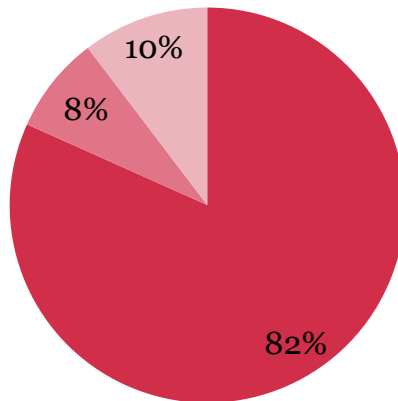
- Catalogue/magazine
- In-Store
- TV Shopping
- Online
- Next generation wearables

Purchase



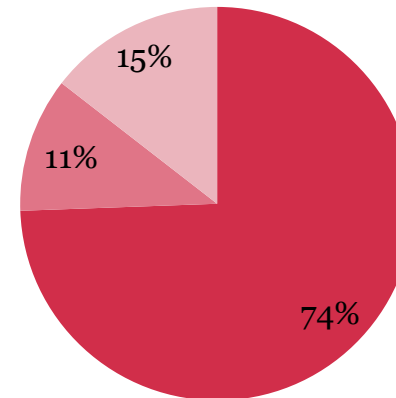
## Online channels breakdown

Research



- Online via PC
- Online via tablet
- Online via mobile/smartphone

Purchase

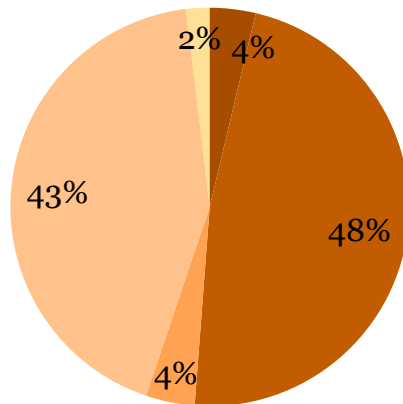


Note: Values in pie charts may total 99 or 101 due to rounding  
PwC

# Jewelry/watches

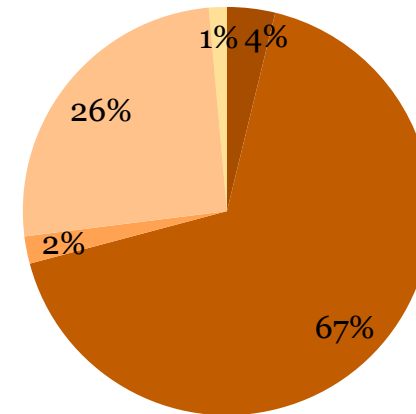
## Preferred shopping methods

Research



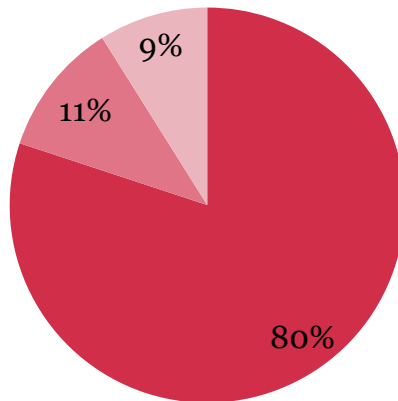
- Catalogue/magazine
- In-Store
- TV Shopping
- Online
- Next generation wearables

Purchase



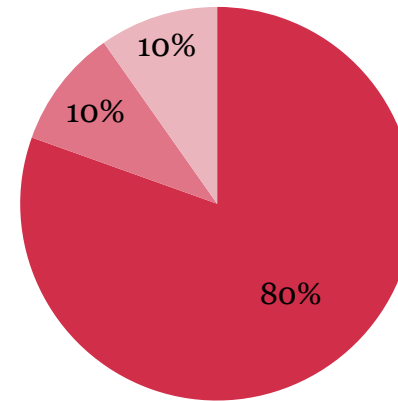
## Online channels breakdown

Research



- Online via PC
- Online via tablet
- Online via mobile/smartphone

Purchase

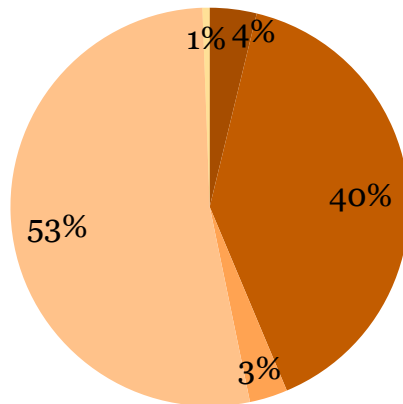


Note: Values in pie charts may total 99 or 101 due to rounding  
PwC

# Do-it-yourself/home improvement

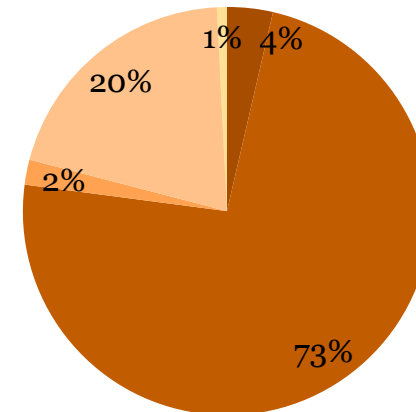
## Preferred shopping methods

Research



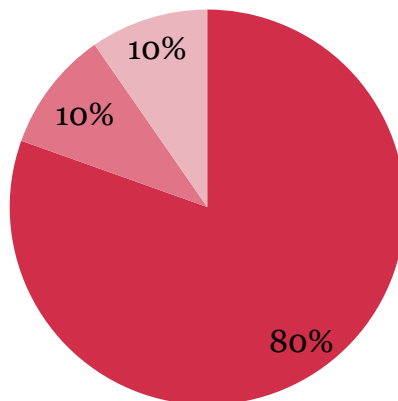
- Catalogue/magazine
- In-Store
- TV Shopping
- Online
- Next generation wearables

Purchase



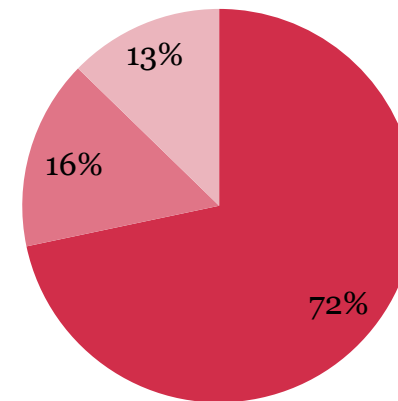
## Online channels breakdown

Research



- Online via PC
- Online via tablet
- Online via mobile/smartphone

Purchase



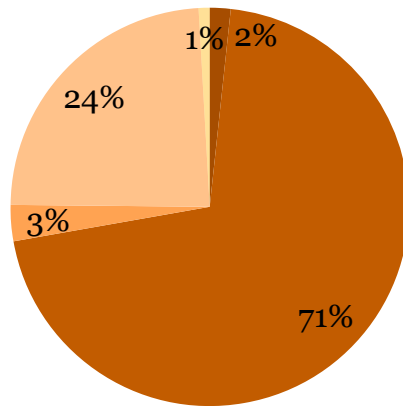
Note: Values in pie charts may total 99 or 101 due to rounding  
PwC



# Grocery

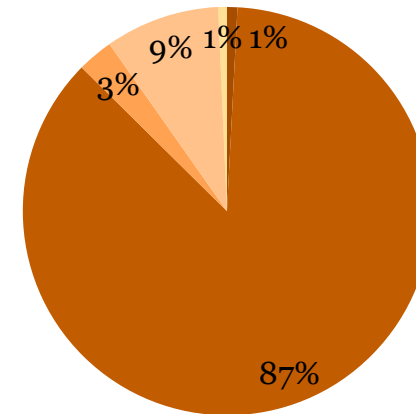
## Preferred shopping methods

Research



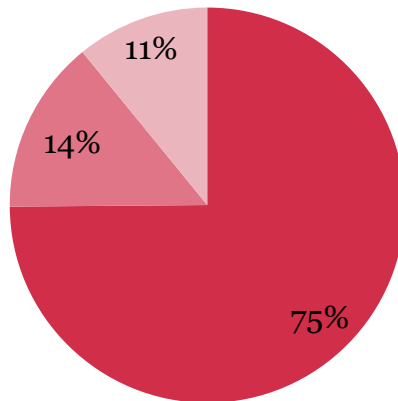
- Catalogue/magazine
- In-Store
- TV Shopping
- Online
- Next generation wearables

Purchase



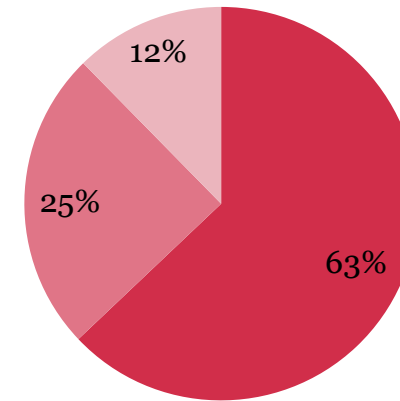
## Online channels breakdown

Research



- Online via PC
- Online via tablet
- Online via mobile/smartphone

Purchase

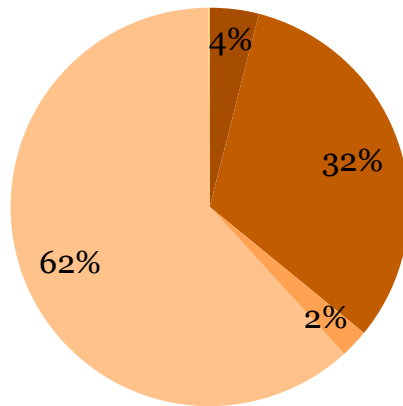


Note: Values in pie charts may total 99 or 101 due to rounding  
PwC

# Toys

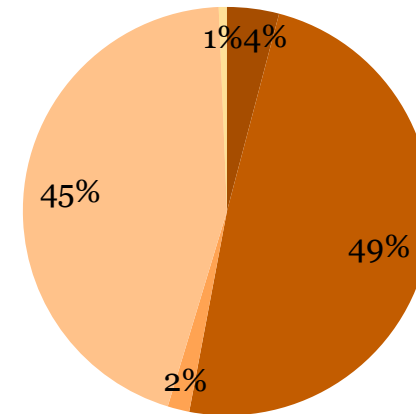
## Preferred shopping methods

Research



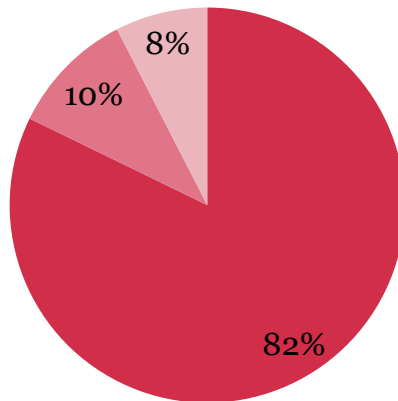
- Catalogue/magazine
- In-Store
- TV Shopping
- Online
- Next generation wearables

Purchase



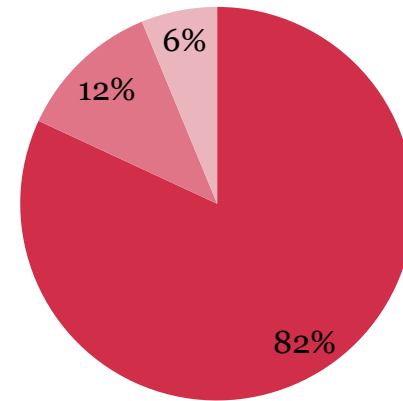
## Online channels breakdown

Research



- Online via PC
- Online via tablet
- Online via mobile/smartphone

Purchase

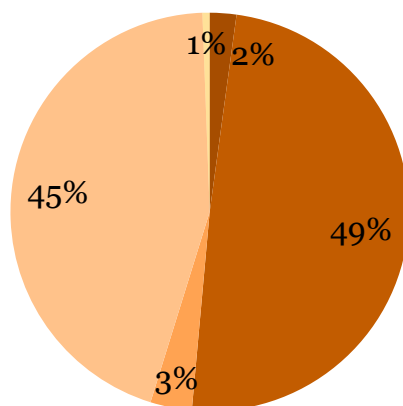


Note: Values in pie charts may total 99 or 101 due to rounding  
PwC

# Health and beauty (cosmetics)

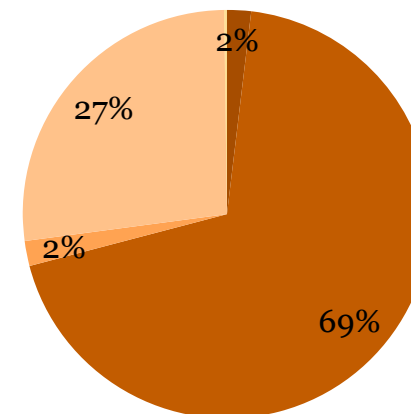
## Preferred shopping methods

Research



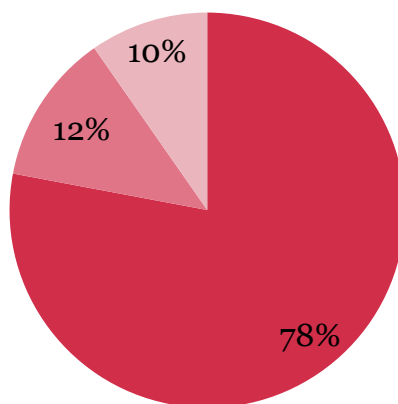
- Catalogue/magazine
- In-Store
- TV Shopping
- Online
- Next generation wearables

Purchase



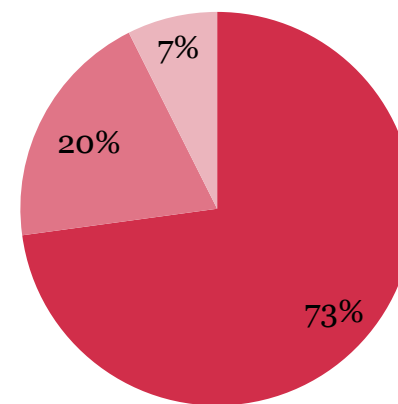
## Online channels breakdown

Research



- Online via PC
- Online via tablet
- Online via mobile/smartphone

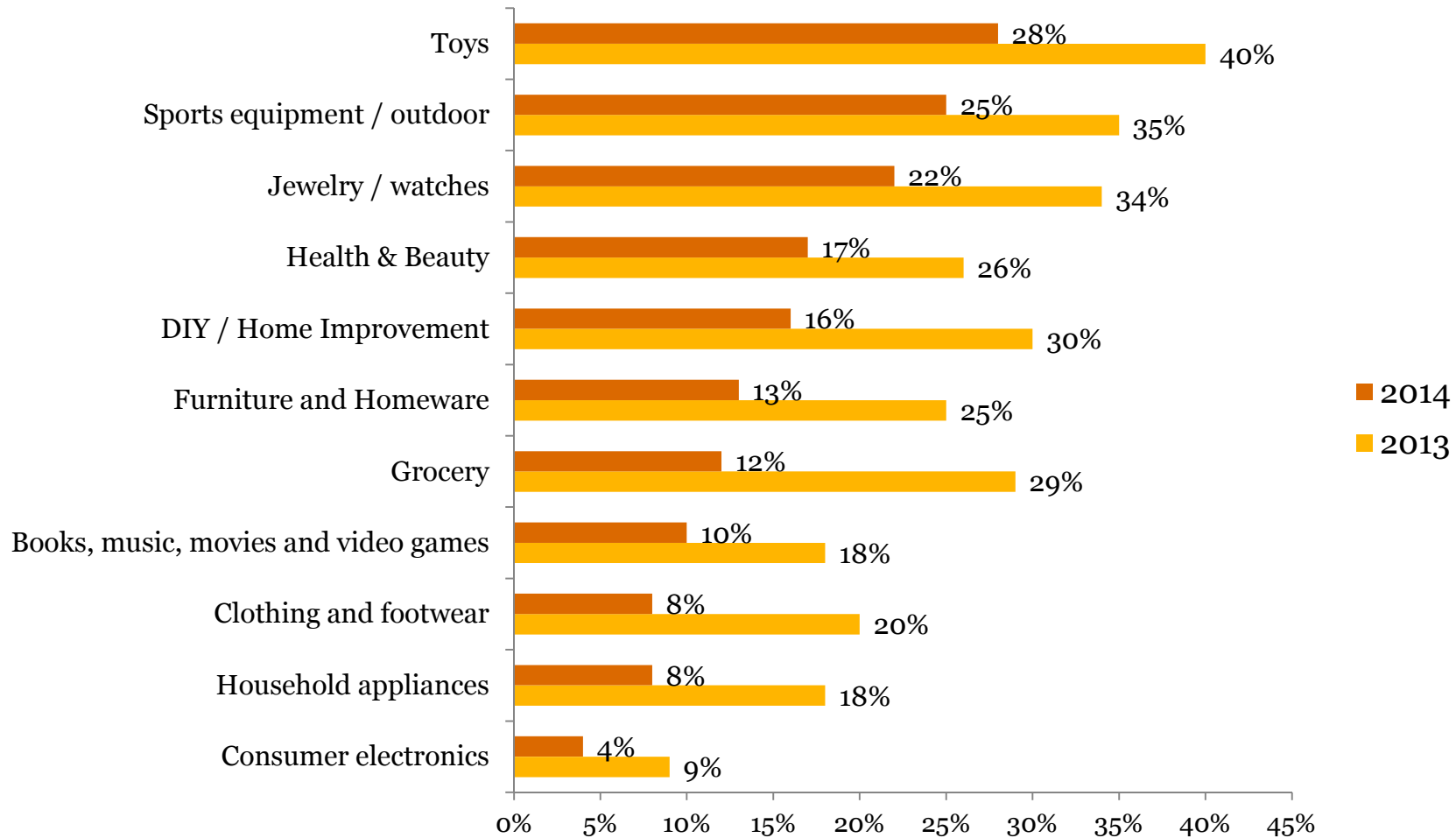
Purchase



Note: Values in pie charts may total 99 or 101 due to rounding  
PwC

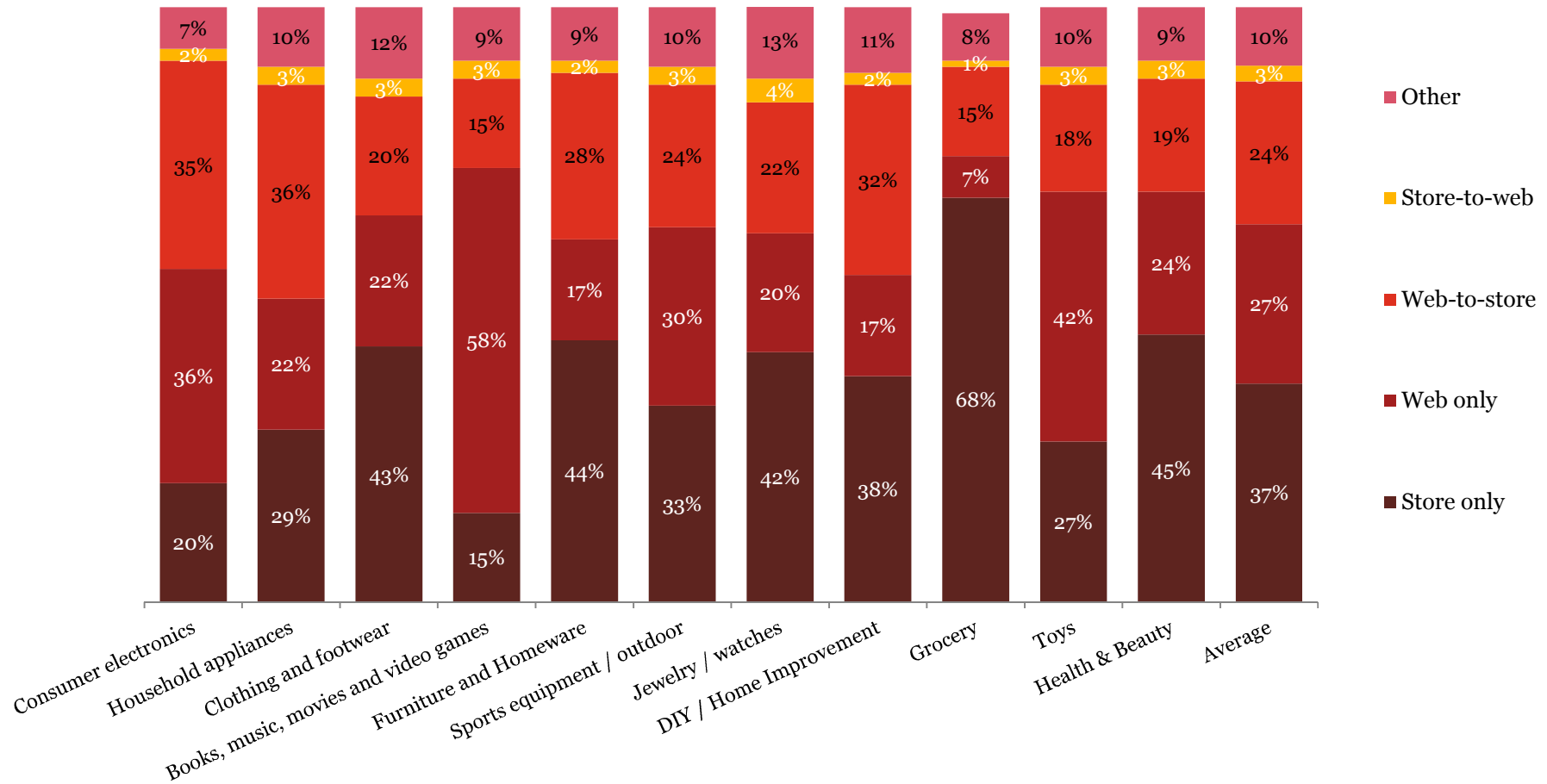
# Cross-channel shopping behaviour

## Those who do not research before purchasing

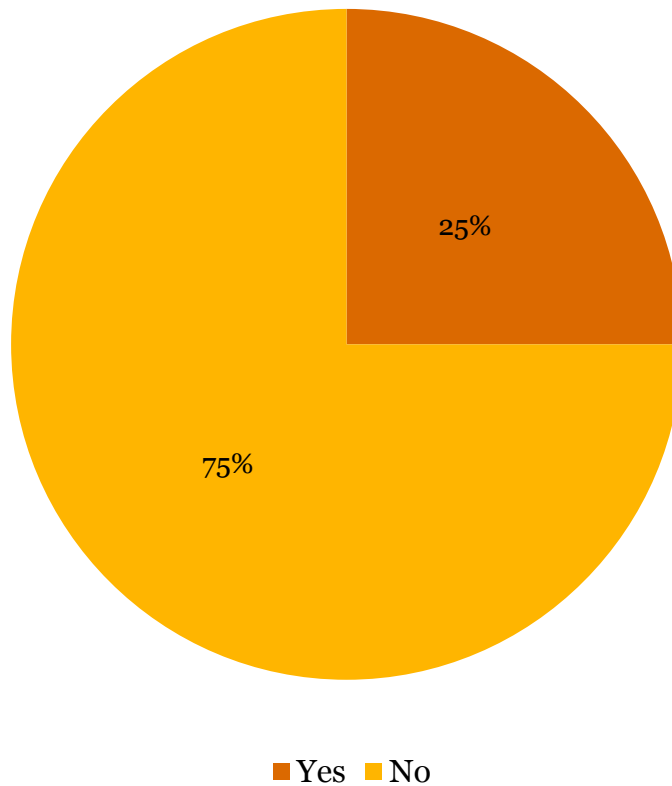


# Cross-channel shopping behaviour

## Research to purchase



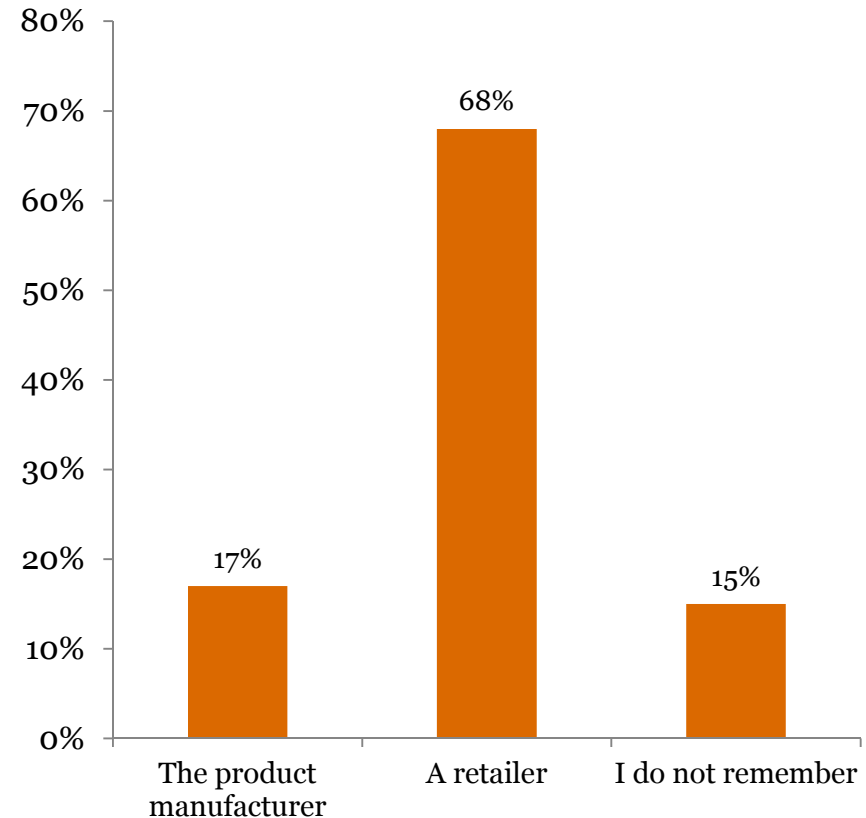
**Q28. Thinking about your online purchases, does it matter to you whether you purchase from a traditional retailer or a product manufacturer?**



Base: 1011

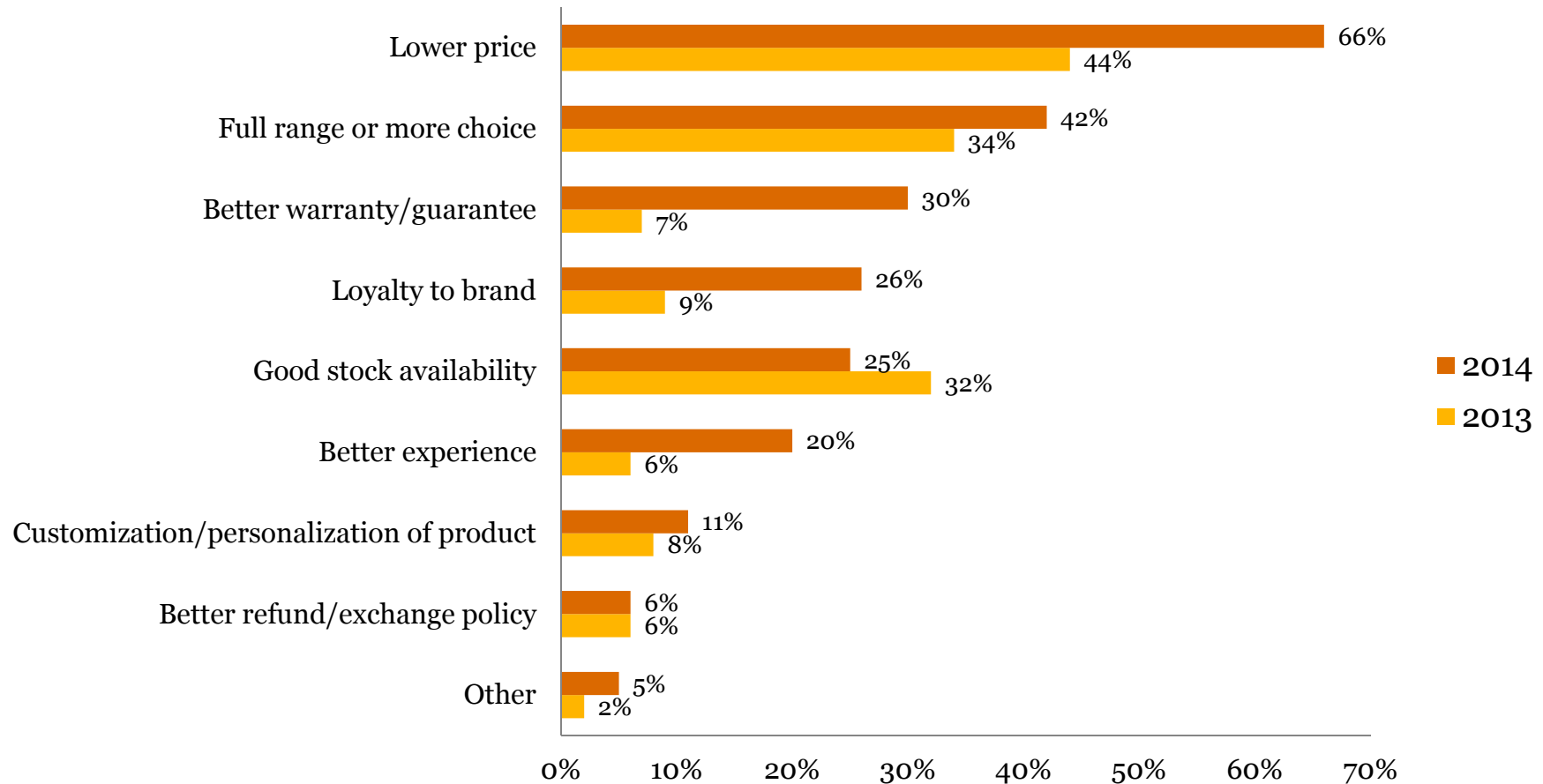
PwC

**Q29. Thinking about your last online purchase, did you buy from...**



Base: 1011

**Q30. If you bypassed a retailer for your last online purchase, why did you buy directly from the product manufacturer's website?**

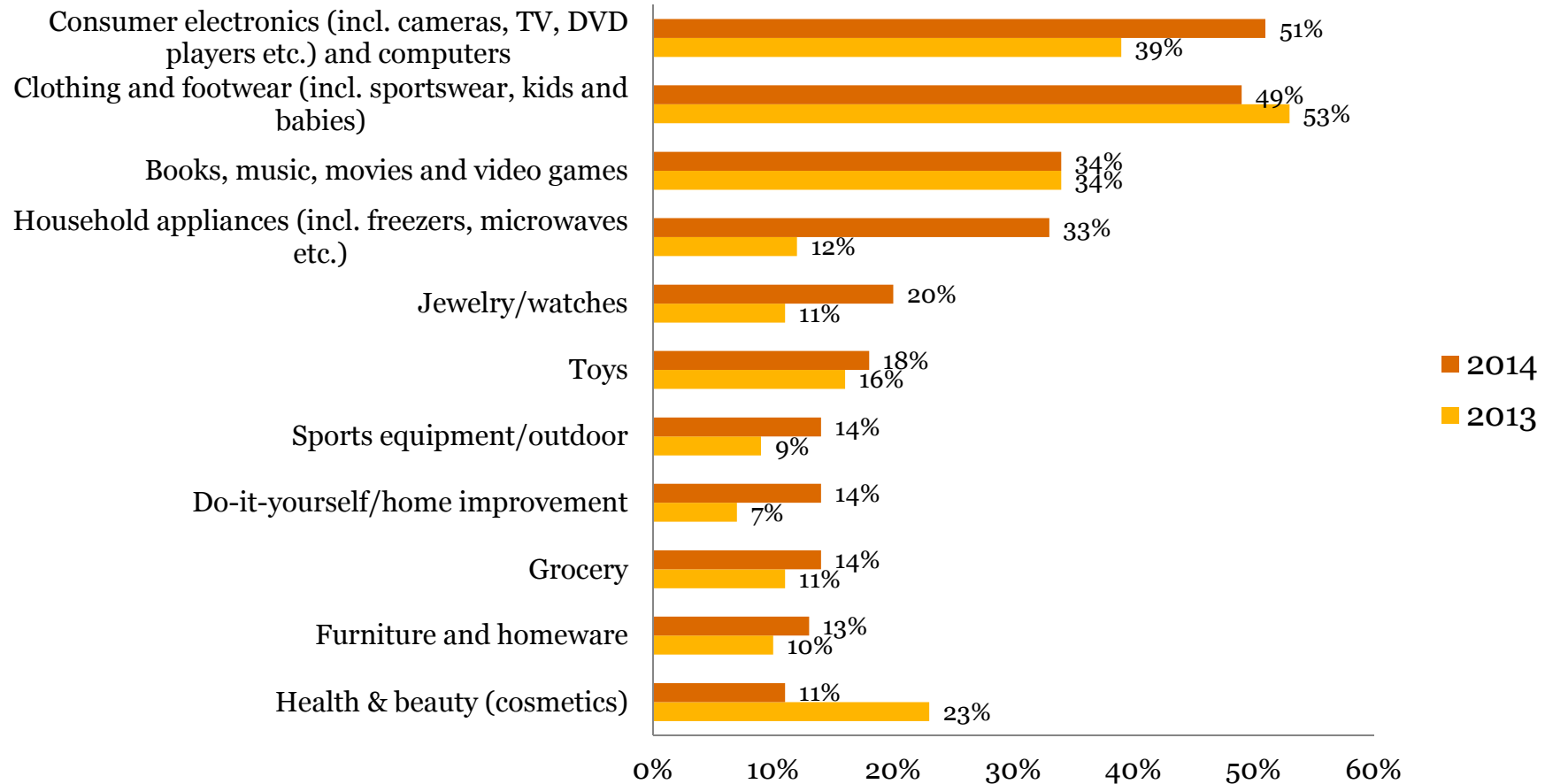


Base: 168 (2014) 1002 (2013)

Note: Respondents were asked to select the THREE most important factors.

Note: Question only asked to those who selected 'The product manufacturer' at Q29

**Q31. Please indicate from which of these product categories you have bought directly from a product manufacturer online**

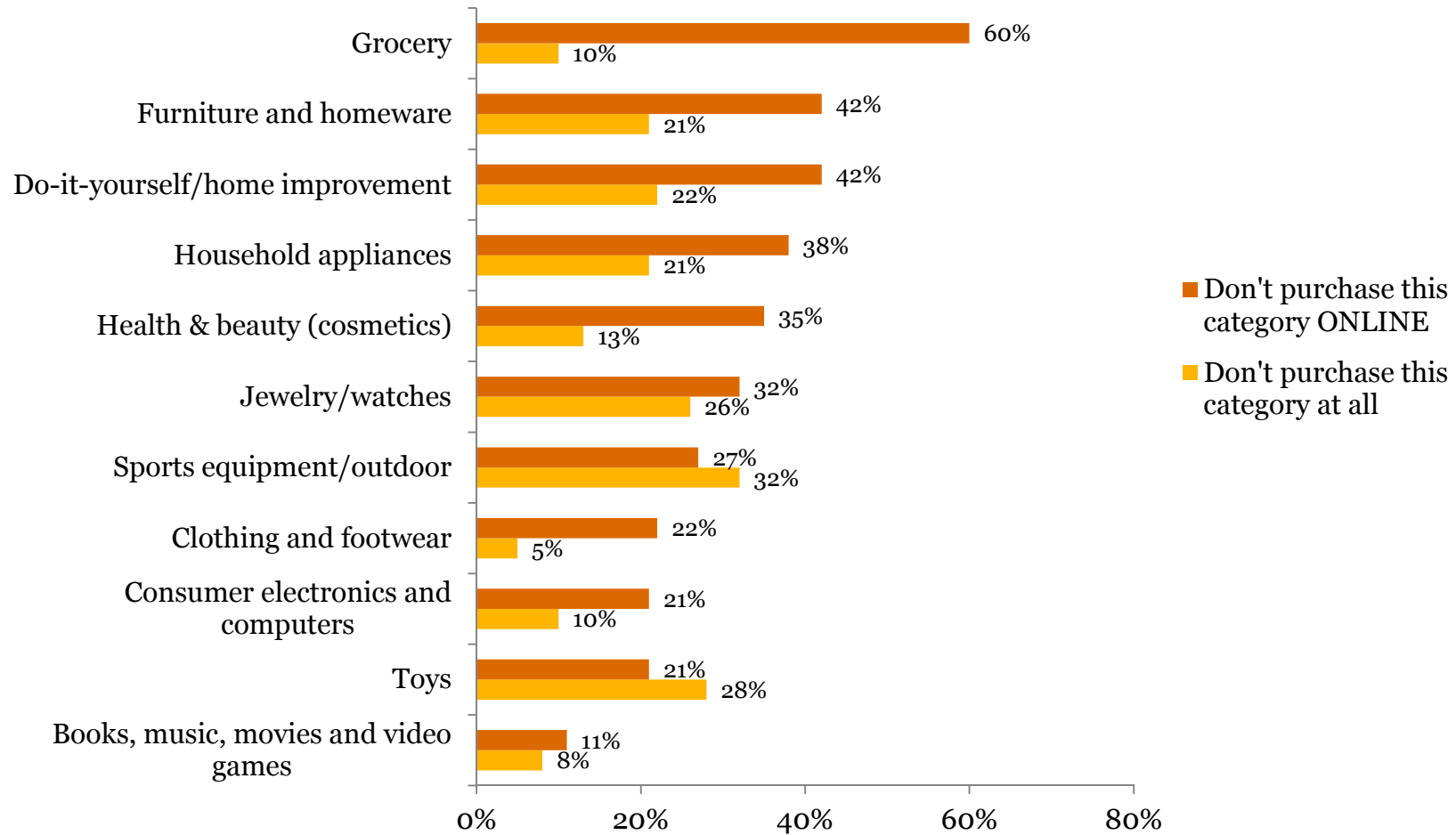


Base: 168 (2014) 698 (2013)

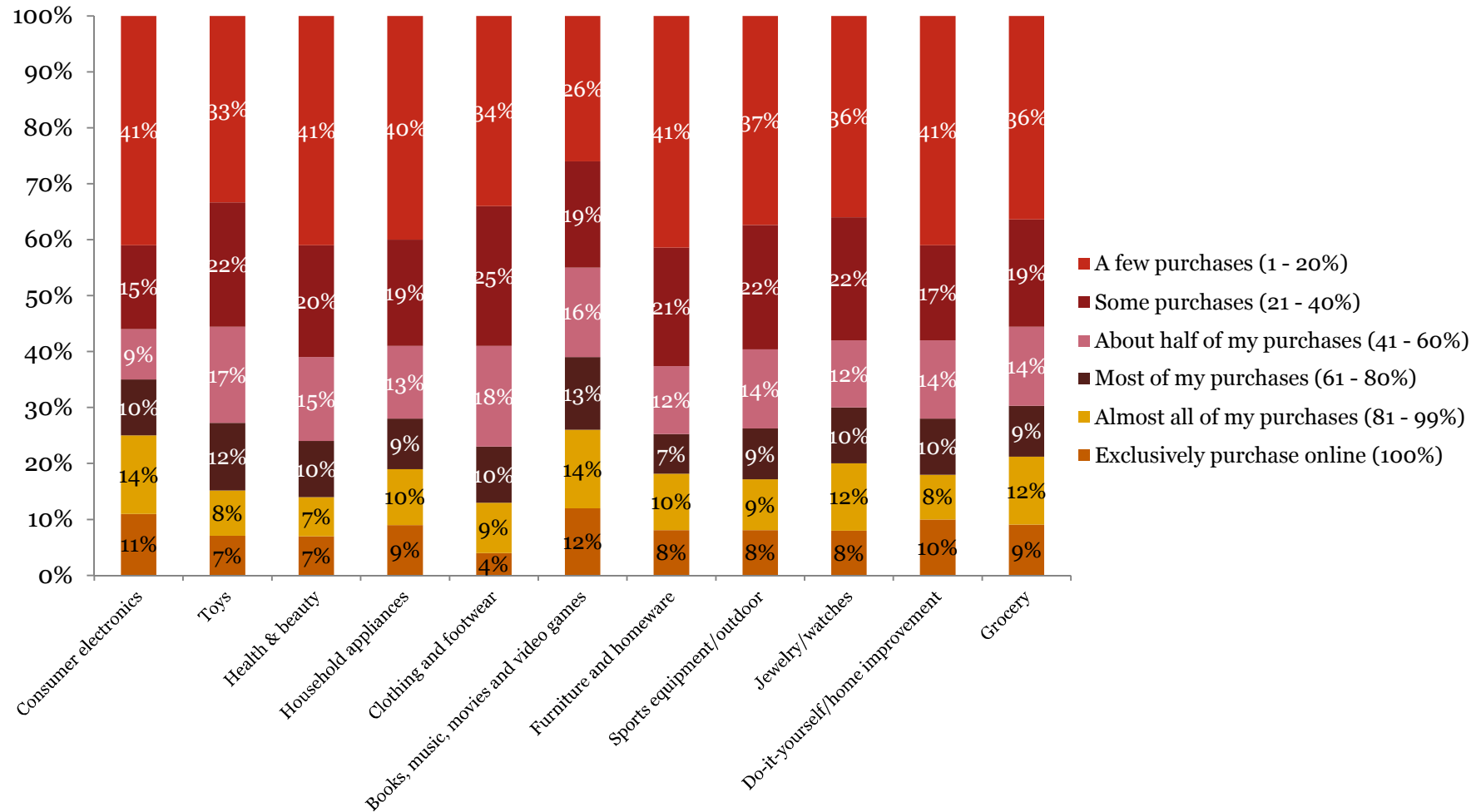
Note: Question only asked to those who selected 'The product manufacturer' at Q29



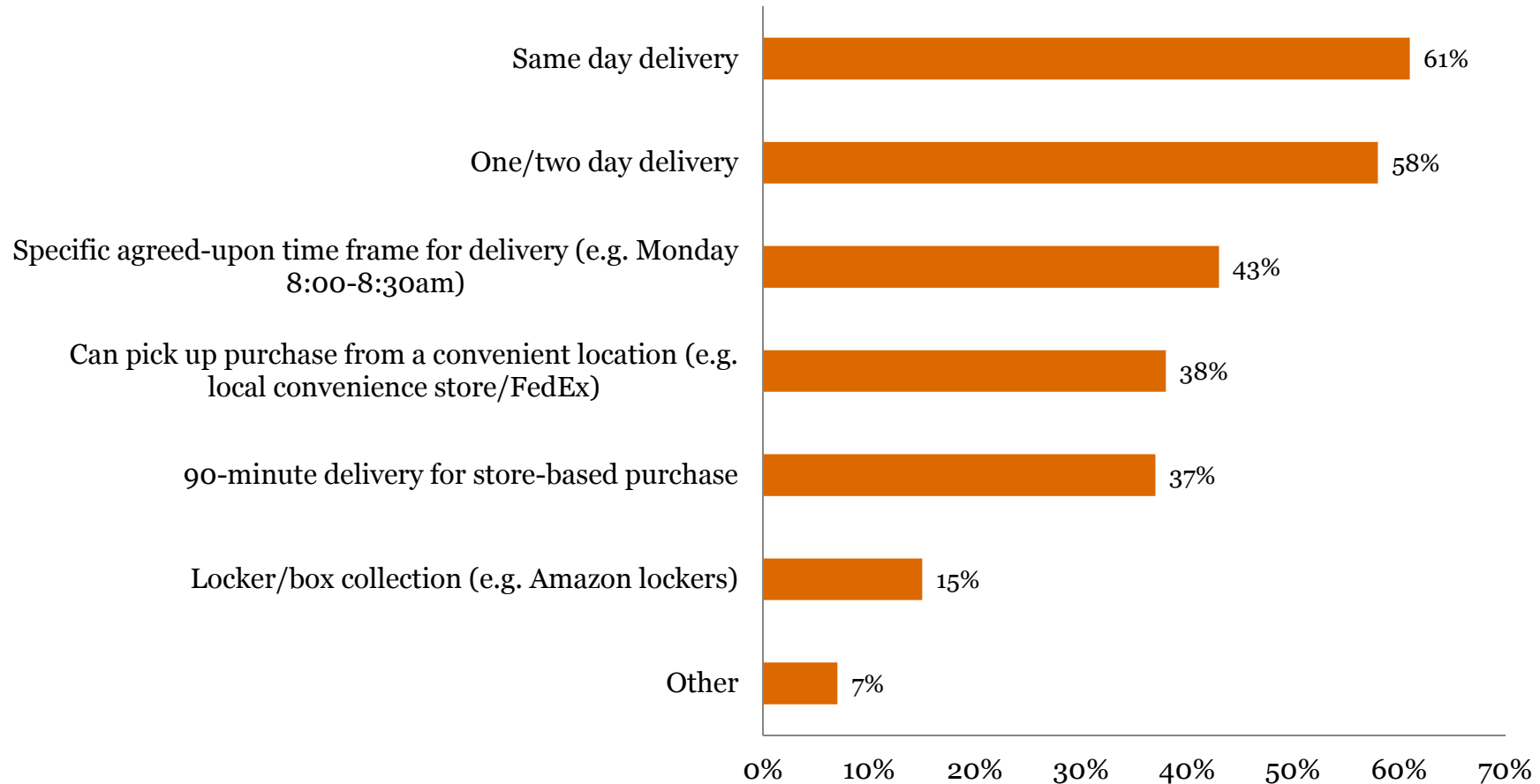
**Q32a. Those who have not purchased online/at all over the last 12 months for each of the product categories.**



**Q32b. For each of the following product categories, how many of your purchases have you made online over the last 12 months?**



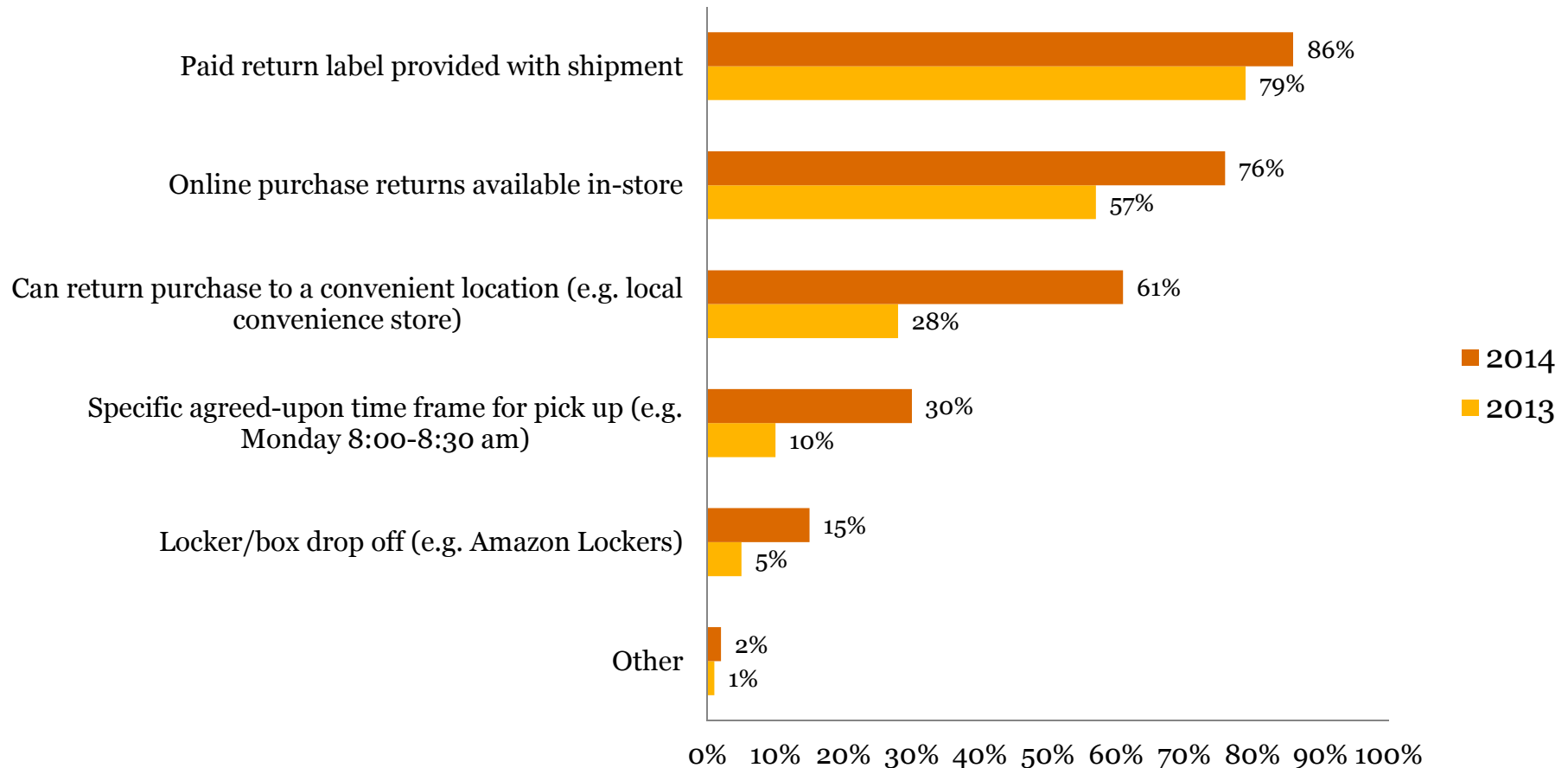
**Q33. Assuming you have free basic delivery, which of the following other delivery options would you be willing to pay for?**



Base: 964

Note: Respondents had to rank their THREE most important factors.

## Q34. Which are the most important return options for you when making a purchase online?



Base: 1000 (2014) 996 (2013)

Note: Respondents had to rank their THREE most important factors.

Note: Please approach 2013 comparisons with caution due to slight wording variations.

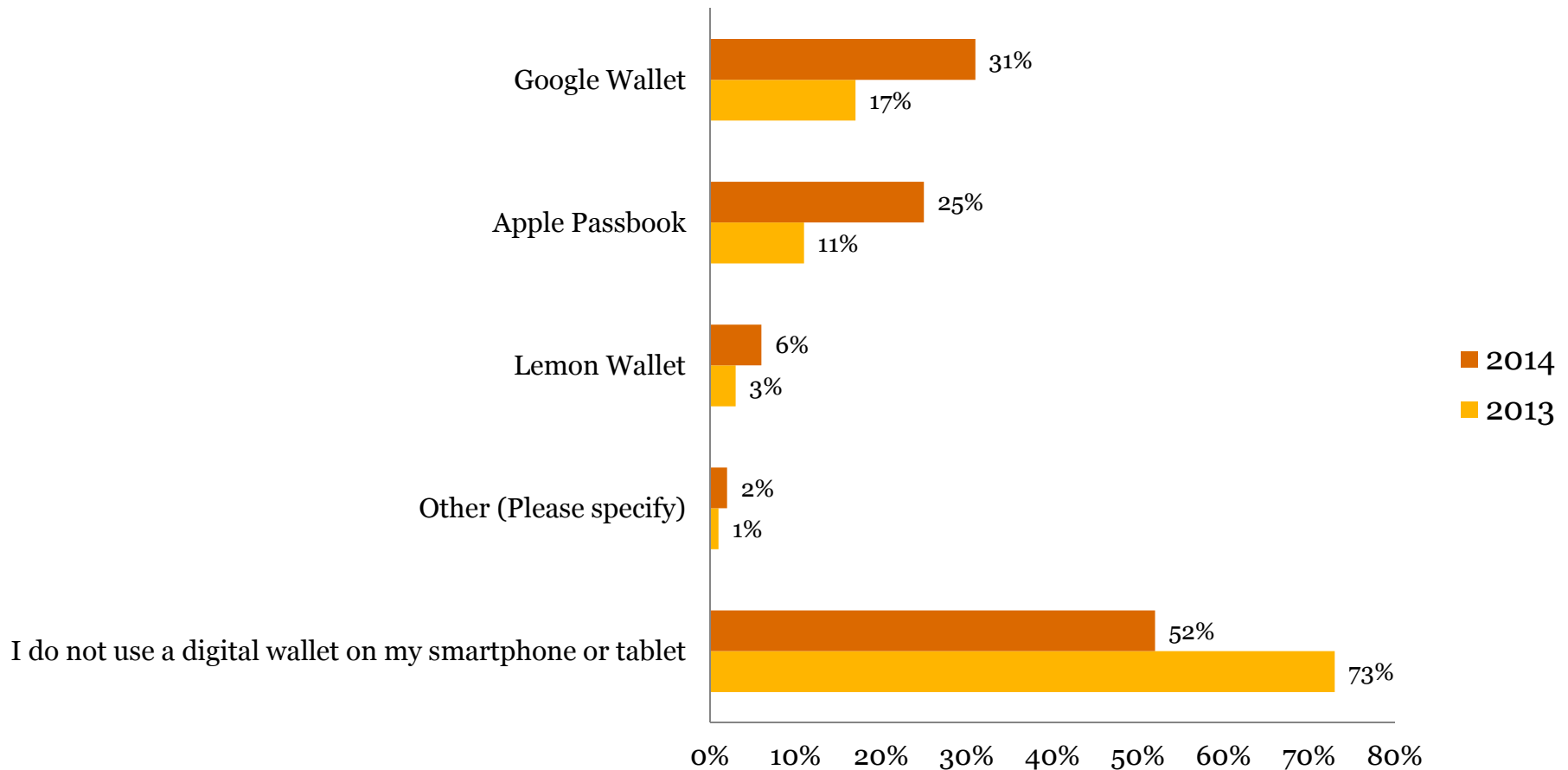
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## *US specific questions*

Q35. Which digital wallet do you use on your smartphone or tablet to manage coupons or loyalty cards?

Q36. How important is "ship from store" option for getting the products you want delivered in the following categories?

# Q35. Which digital wallet do you use on your smartphone or tablet to manage coupons or loyalty cards? (US specific question)



Base: 168 (2014) 391 (2013)

## Q36. How important is "ship from store" option for getting the products you want delivered in the following categories? (US specific question)

