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# Introducing Norrelle Goldring

## Head Shopper Insight & Retail Strategy, GfK Australia

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A woman with long dark hair, wearing a light-colored trench coat, is standing in front of a store window. She is holding a smartphone up to take a photo of the window display. The window display features mannequins wearing various outfits, including a red jacket and a blue patterned dress. The background shows a city street with buildings and a car.

# Young, Ethical, Mobile:

One and the same shopper?

Norrelle Goldring, Head Shopper Insight & Retail Strategy  
09 June 2015

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# **1** Who are the ethical shoppers?

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# **2** Who are the mobile instore shoppers?

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# **3** Young shoppers: physical store more important than ever

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# 1. Who are the ethical shoppers?

# Half of Australian shoppers say they only buy products appealing to their beliefs, values or ideals



1

This lags the two thirds who believe brands and companies should be environmentally responsible

2

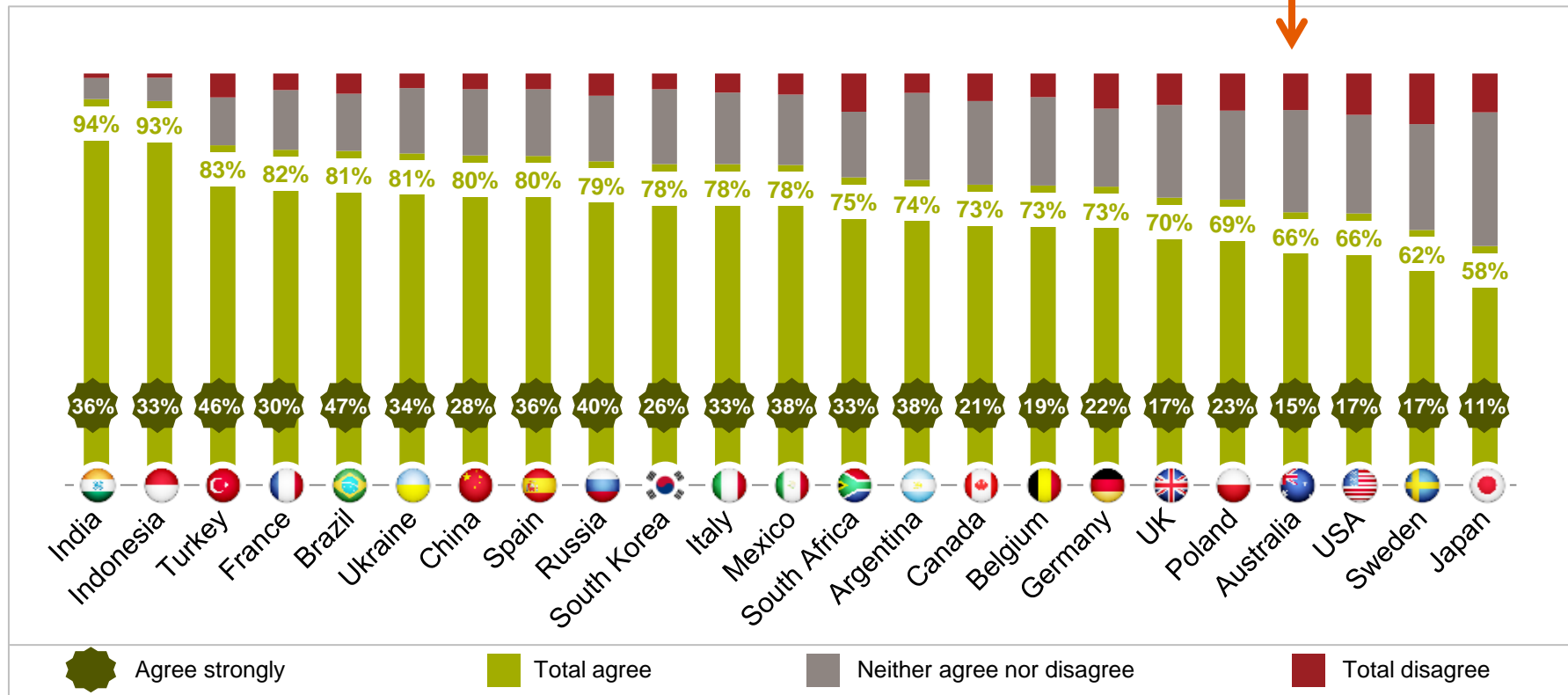
Nearly half of Australians feel guilty when doing something that is not environmentally friendly

3

But Australians place less importance on all of these than many other countries.



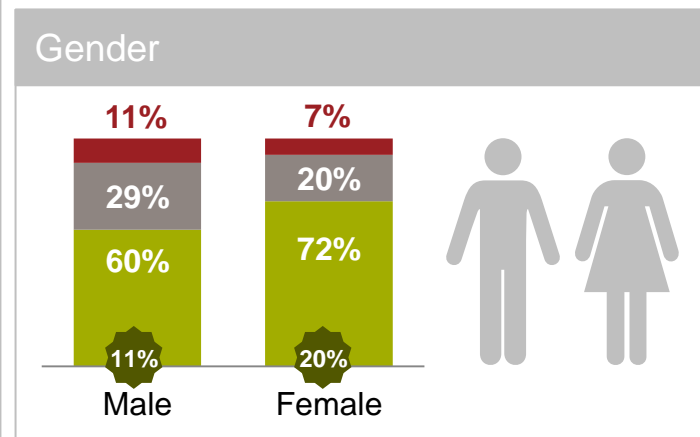
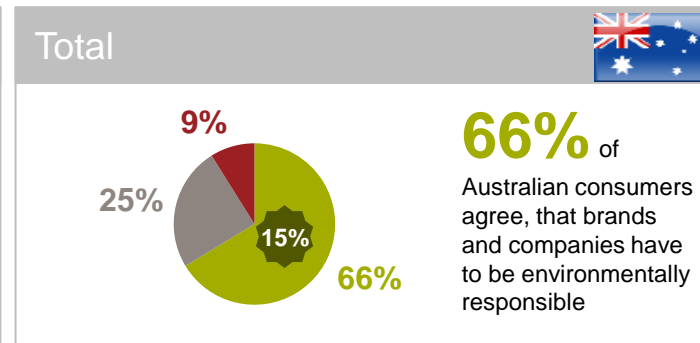
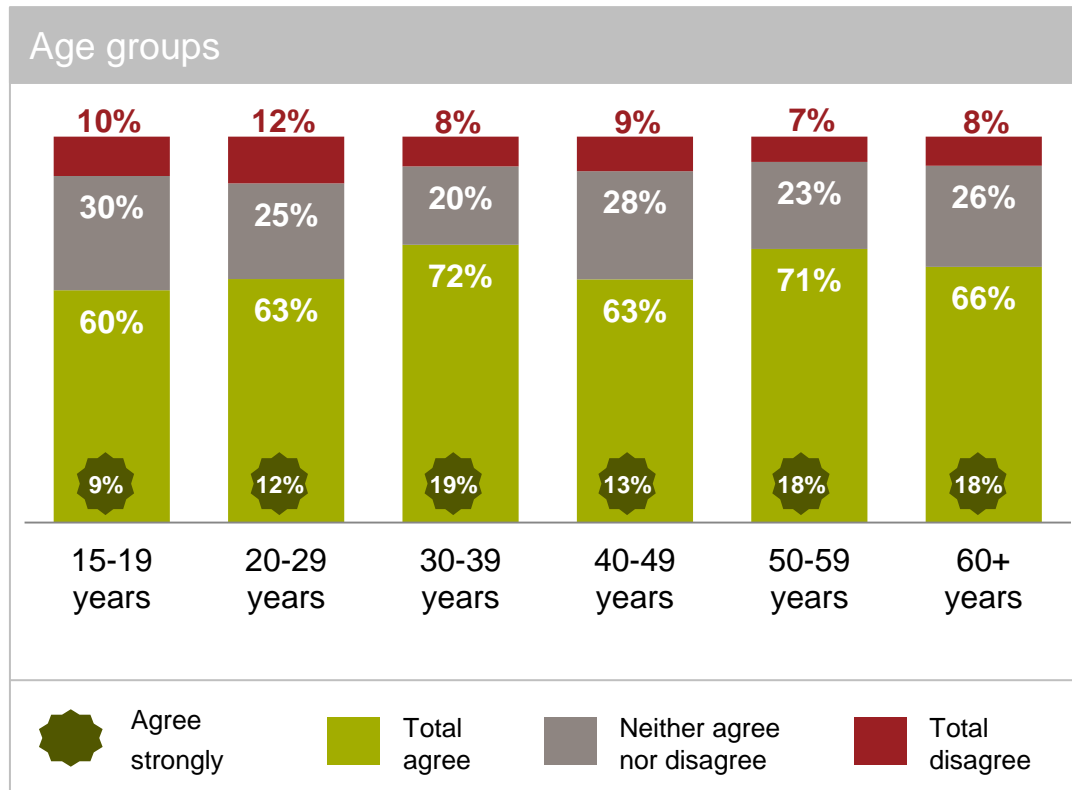
Although 2/3 agree, Australia is third last in believing that brands and companies have to be environmentally responsible



Source: GfK survey among 28,000+ consumers (ages 15+) in 23 countries – rounded

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15-29yos actually LOWER in agreement than other lifestages that brands and companies have to be environmentally responsible

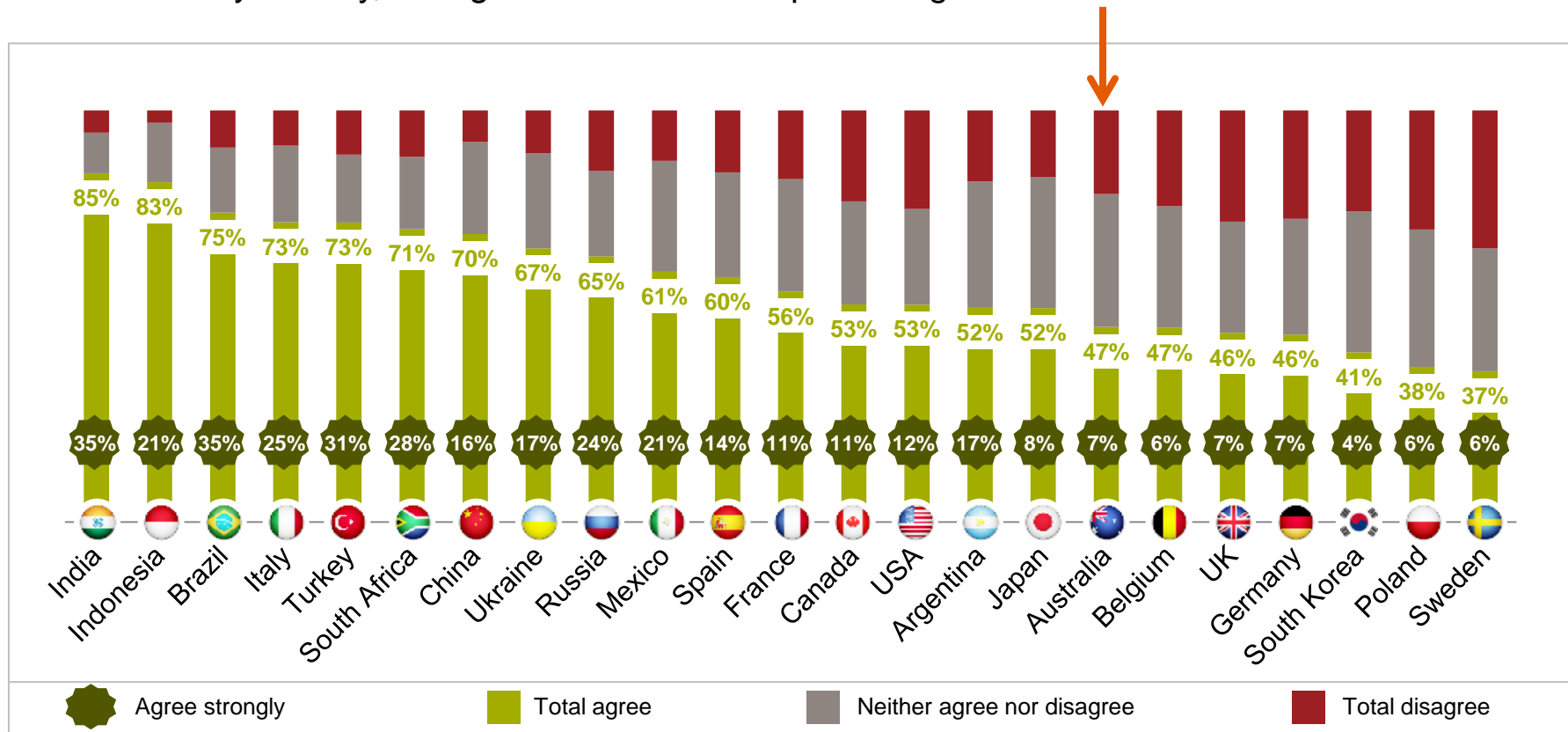


Source: GfK survey among 28,000+ consumers (ages 15+) in 23 countries – rounded

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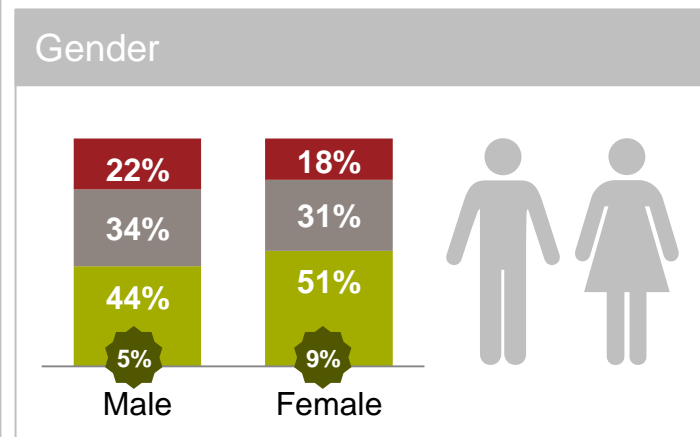
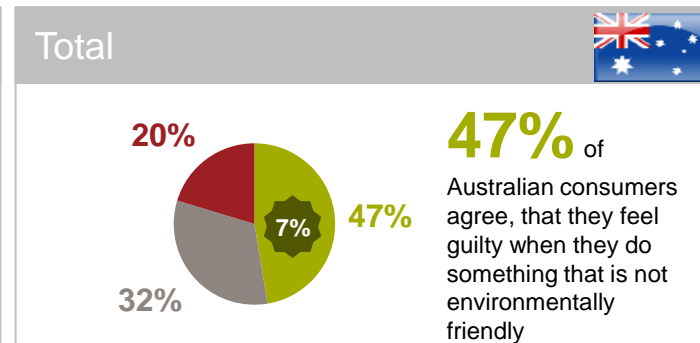
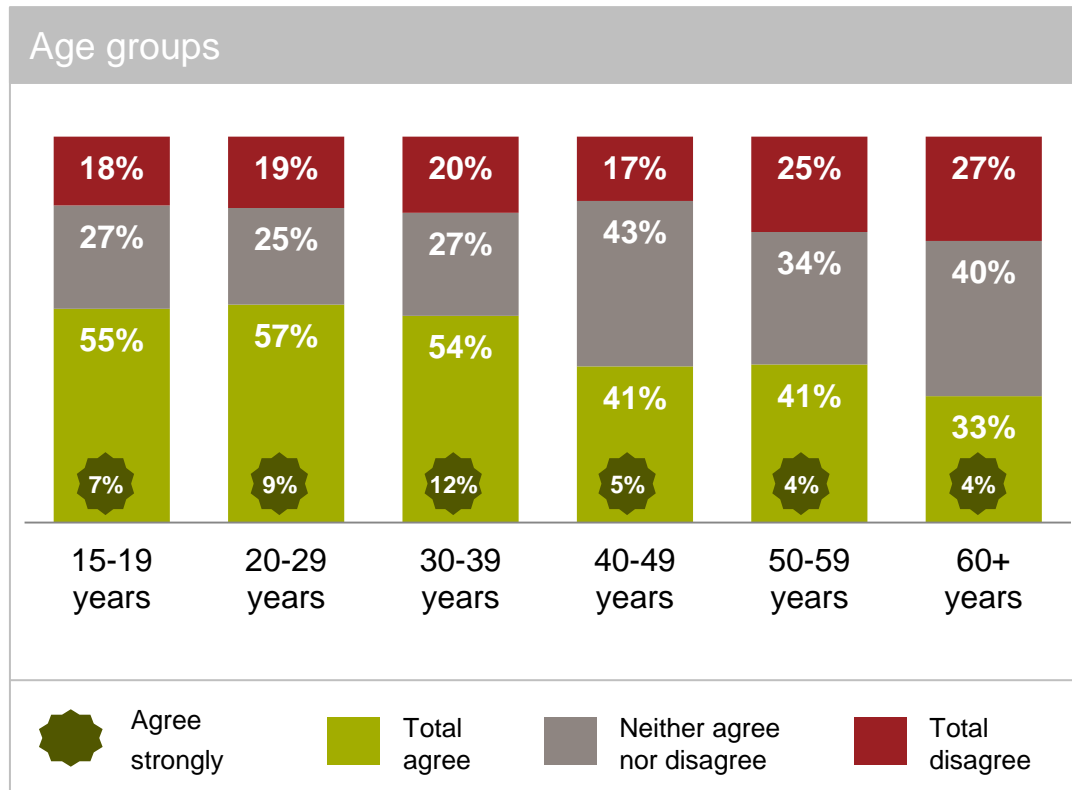
Just under half of Australians feel guilty when they do something that is not environmentally friendly, but again we're 5<sup>th</sup> last in percentage terms



Source: GfK survey among 28,000+ consumers (ages 15+) in 23 countries – rounded

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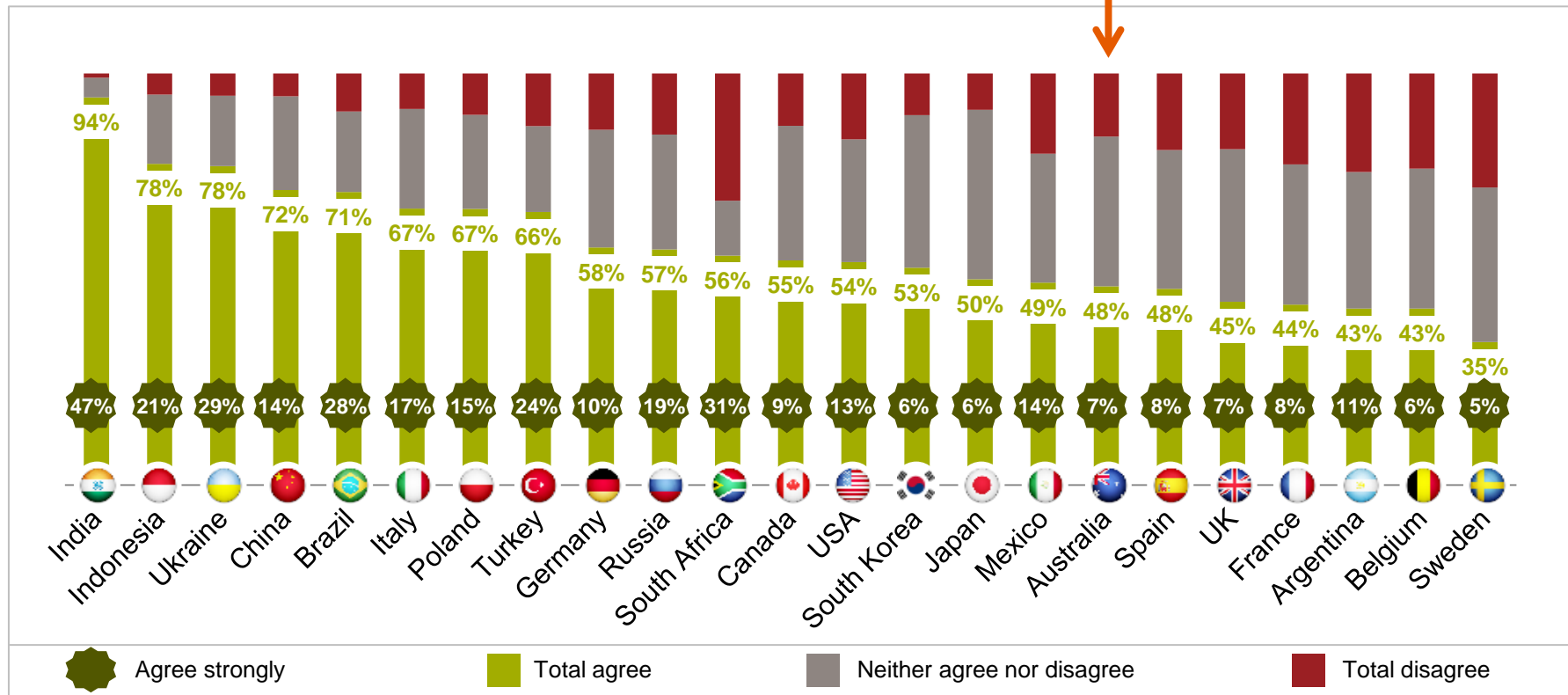
Interestingly it's the 15-29yos who feel guilty when they do something that is not environmentally friendly



Source: GfK survey among 28,000+ consumers (ages 15+) in 23 countries – rounded

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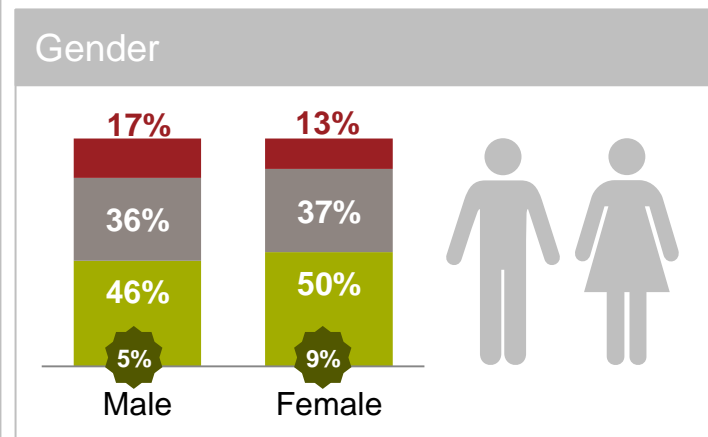
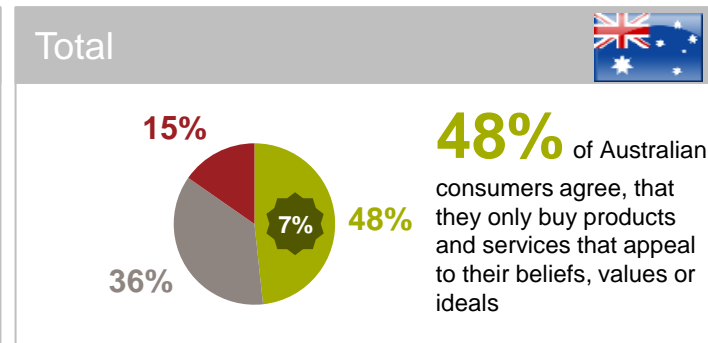
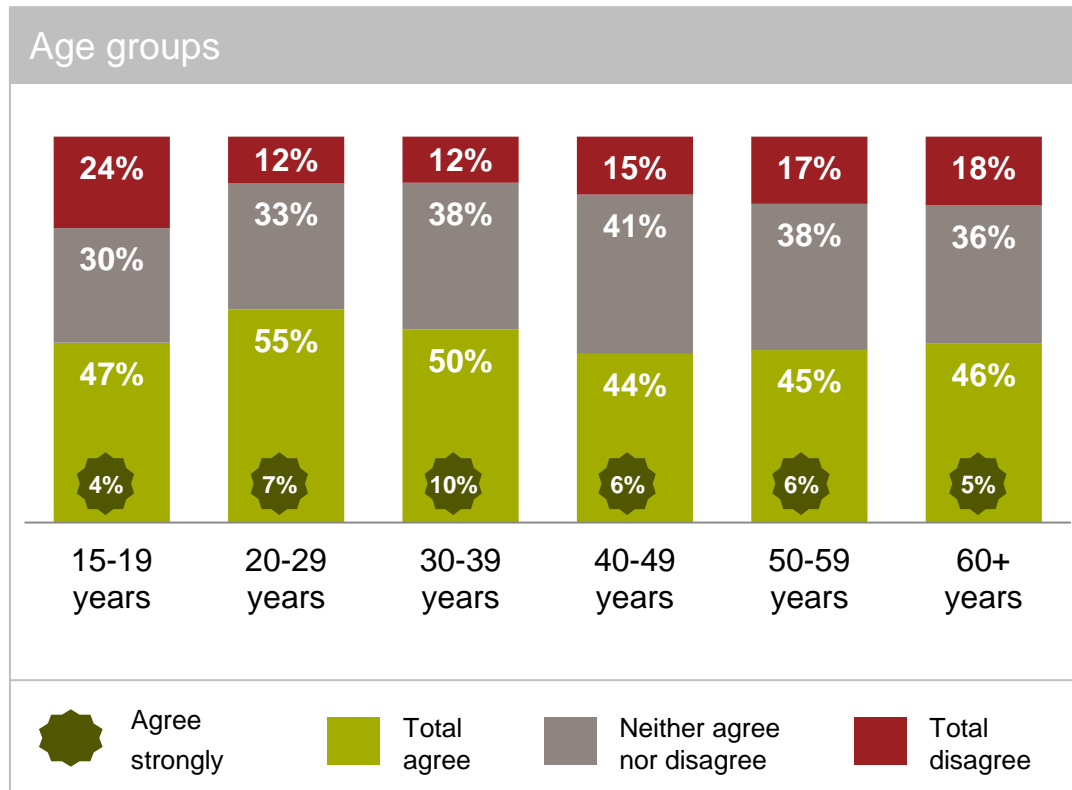
And Australian shoppers are 5<sup>th</sup> last for only buying products and services that appeal to beliefs, values or ideals – although nearly half say they're doing it



Source: GfK survey among 28,000+ consumers (ages 15+) in 23 countries – rounded

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And it's the 20-29yos for whom only buying products and services that appeal to beliefs, values or ideals is most important ... but not by much



Source: GfK survey among 28,000+ consumers (ages 15+) in 23 countries – rounded

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## 2. Who are the mobile shoppers?

## Shoppers bringing online competition inside bricks-and-mortar stores

### New considerations for physical retailers:

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# 1

One in three Australian shoppers are using their mobile phones while shopping inside a store to compare prices

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# 2

One in three are contacting friends or family for advice

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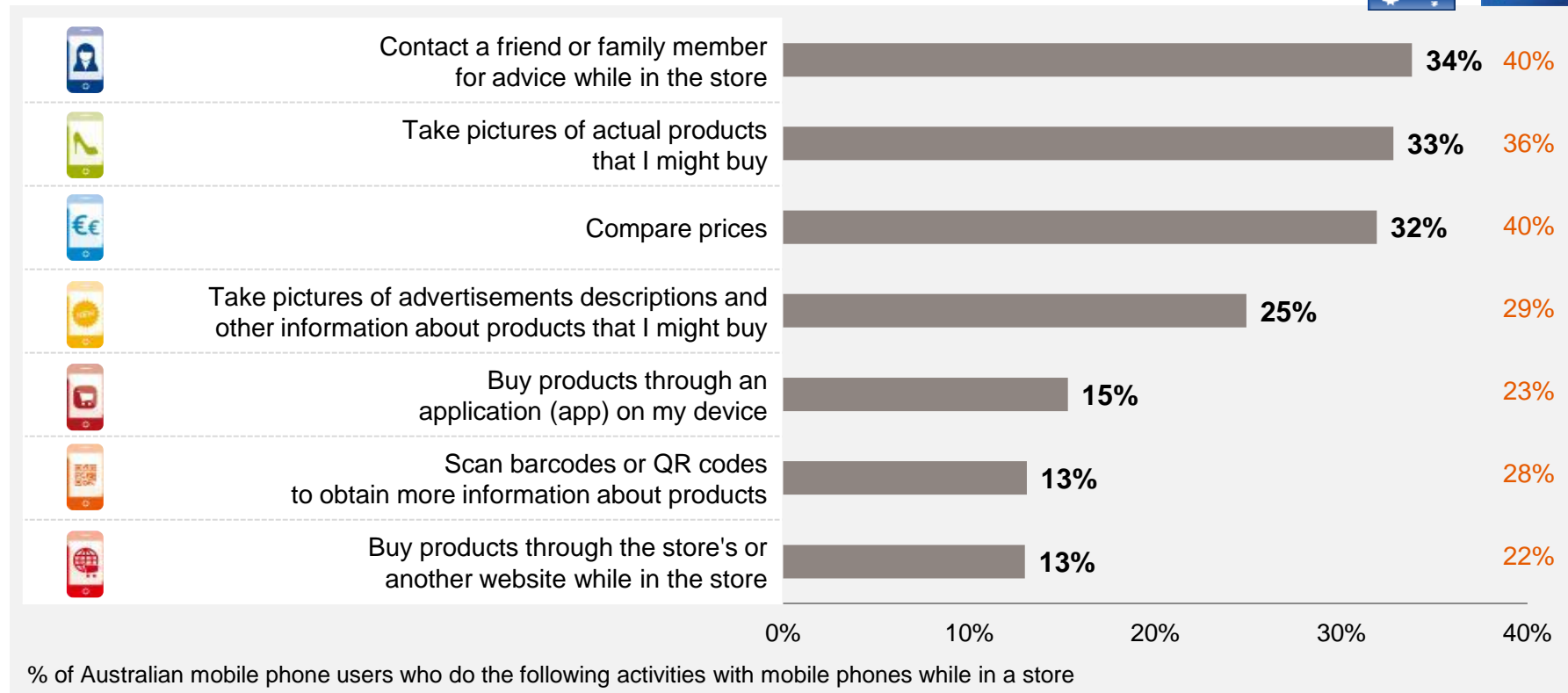
# 3

And one in three take pictures of products they might buy

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# When you are in a store, which of the following, if any, do you regularly do with your mobile phone?



Source: GfK survey among 25,000+ mobile users (ages 15+) in 23 countries – rounded

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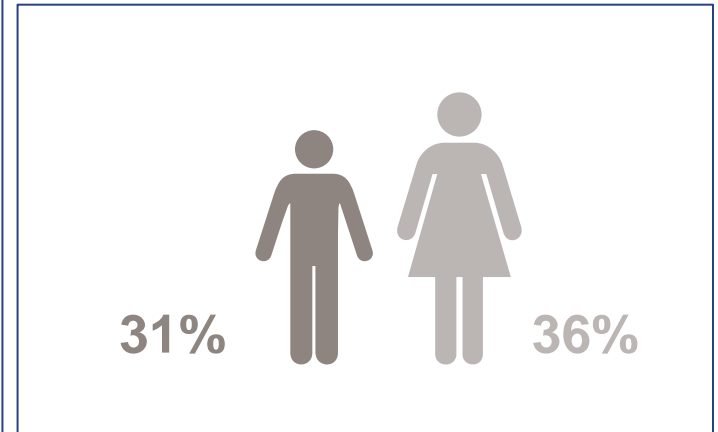
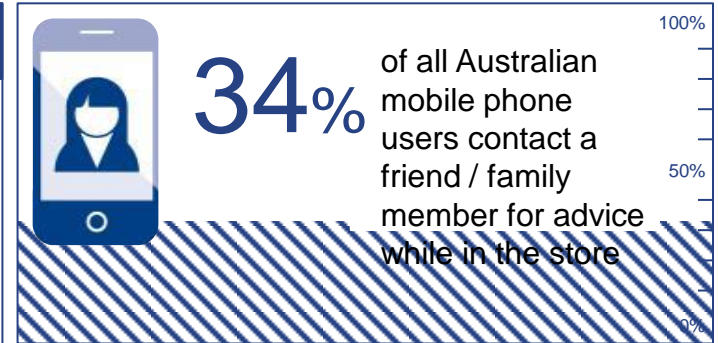
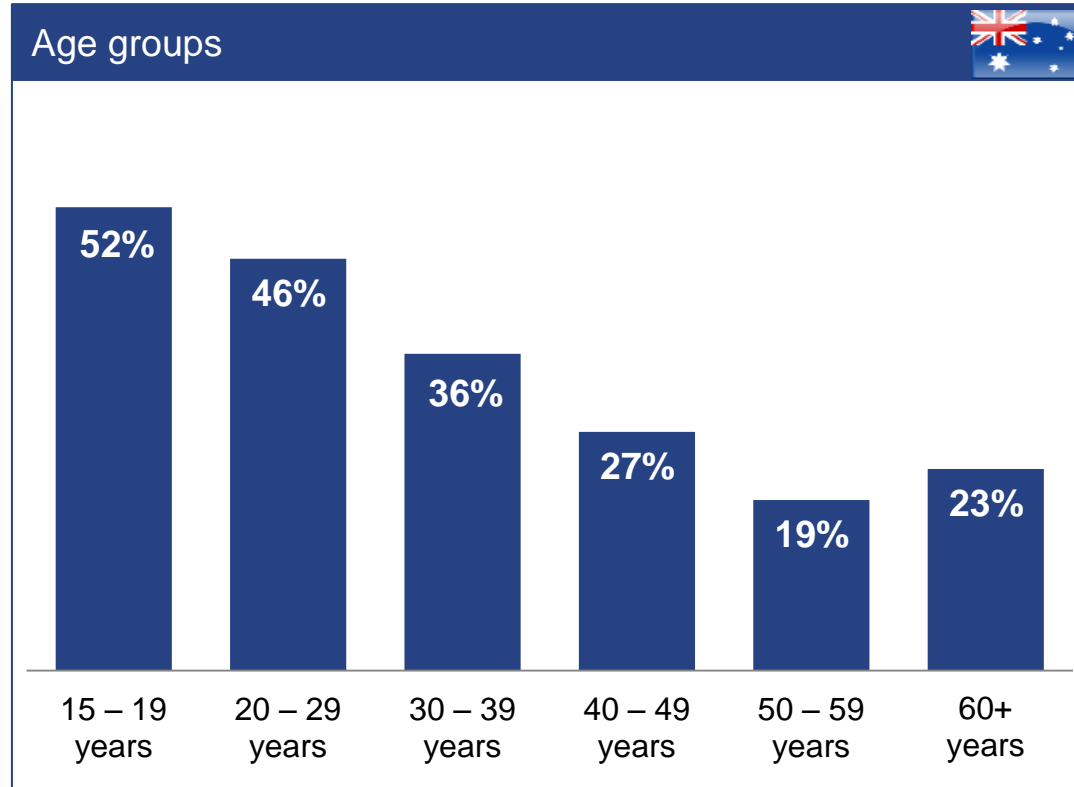
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A quick look at who is doing each of these activities  
(Yes, it's more likely the younger age groups)

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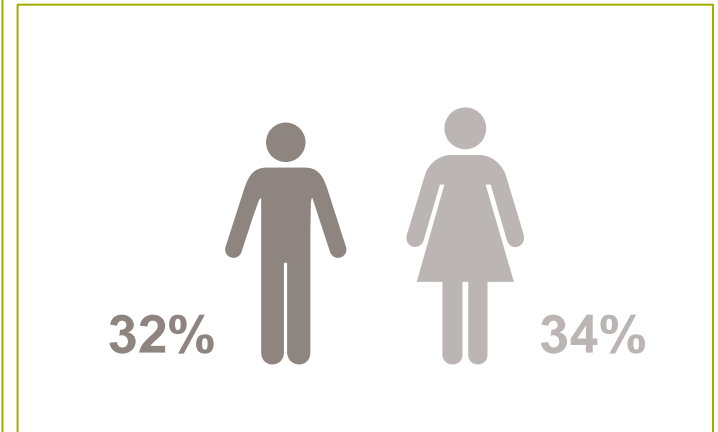
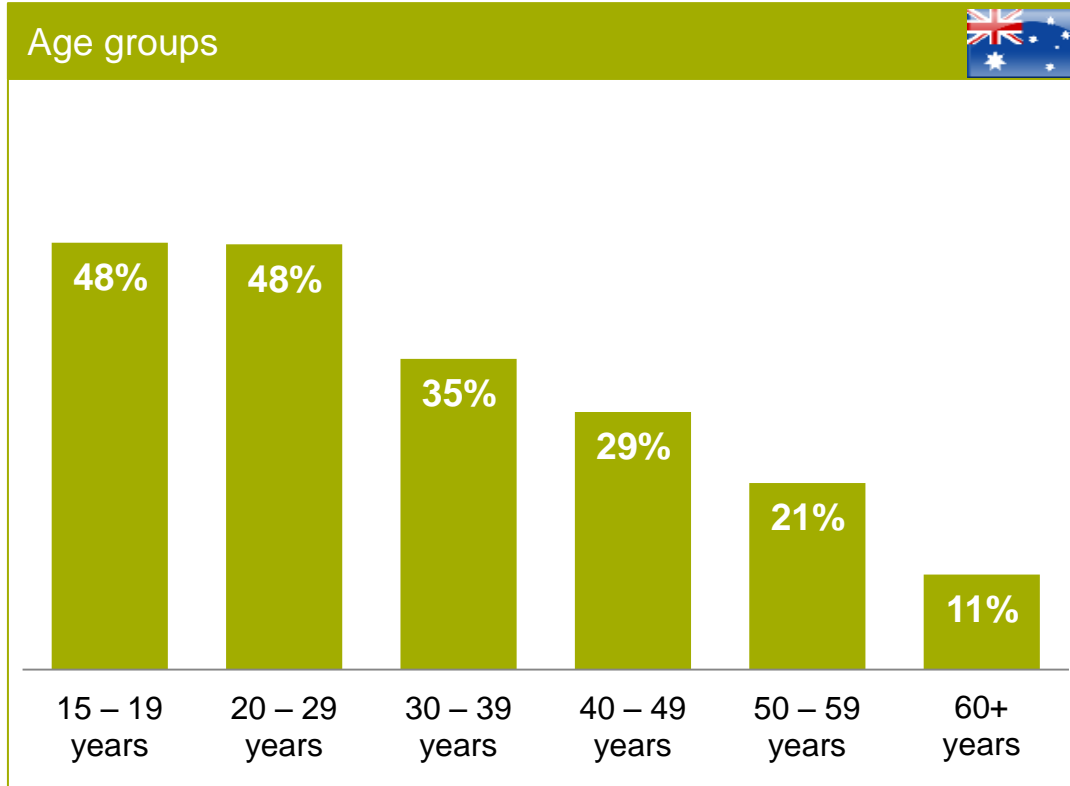
# Contact a friend/family member for advice: Here's where the younger age groups and the sharing culture come in



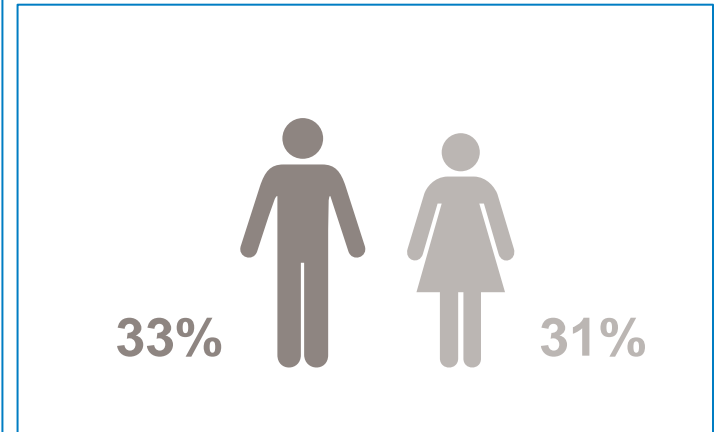
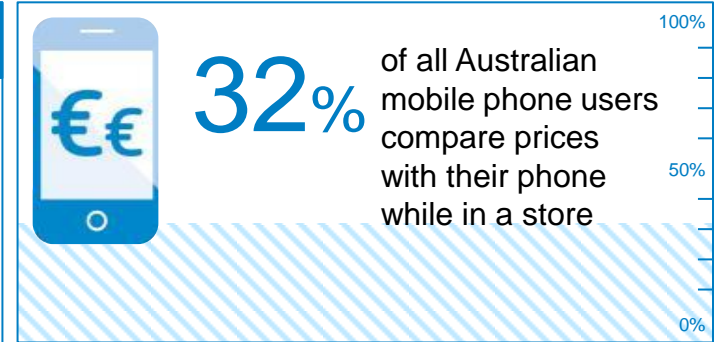
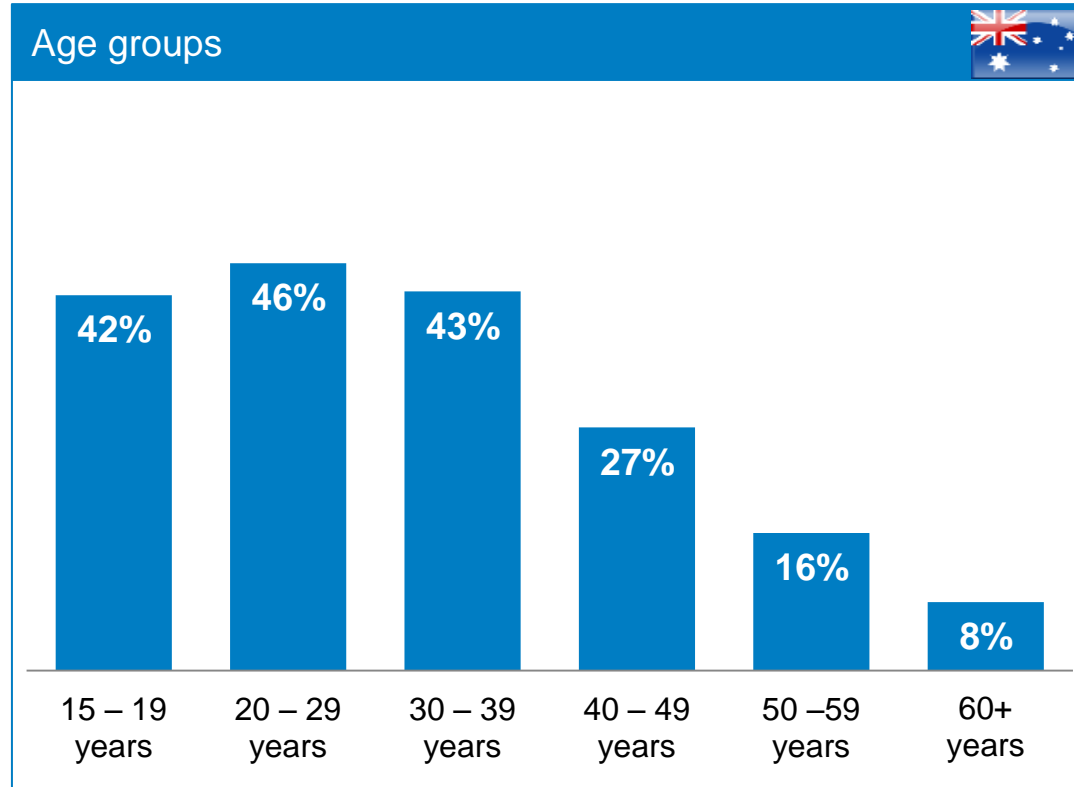
Source: GfK survey among 25,000+ mobile users (ages 15+) in 23 countries – rounded

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# Take pictures of actual products they might buy: Again the two youngest age groups



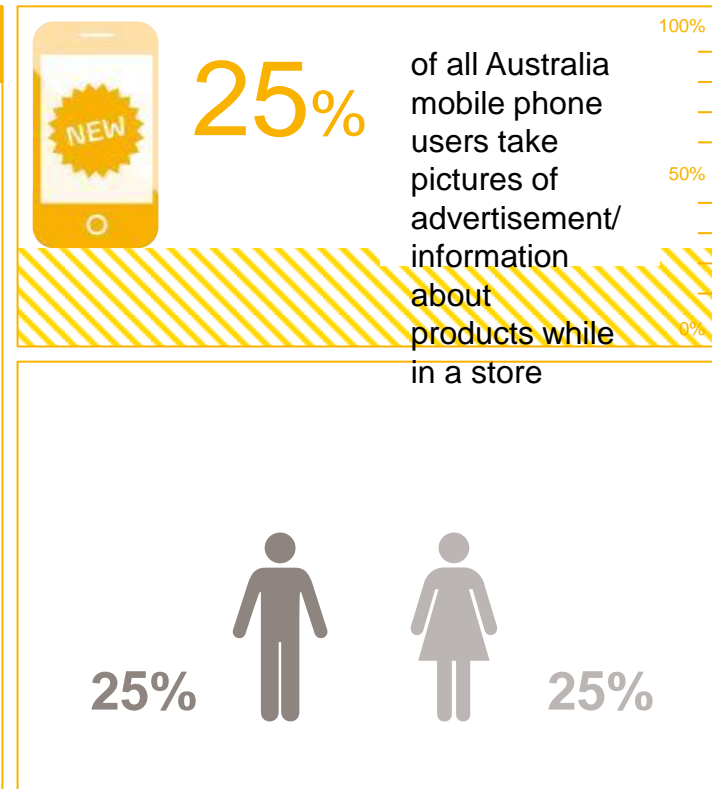
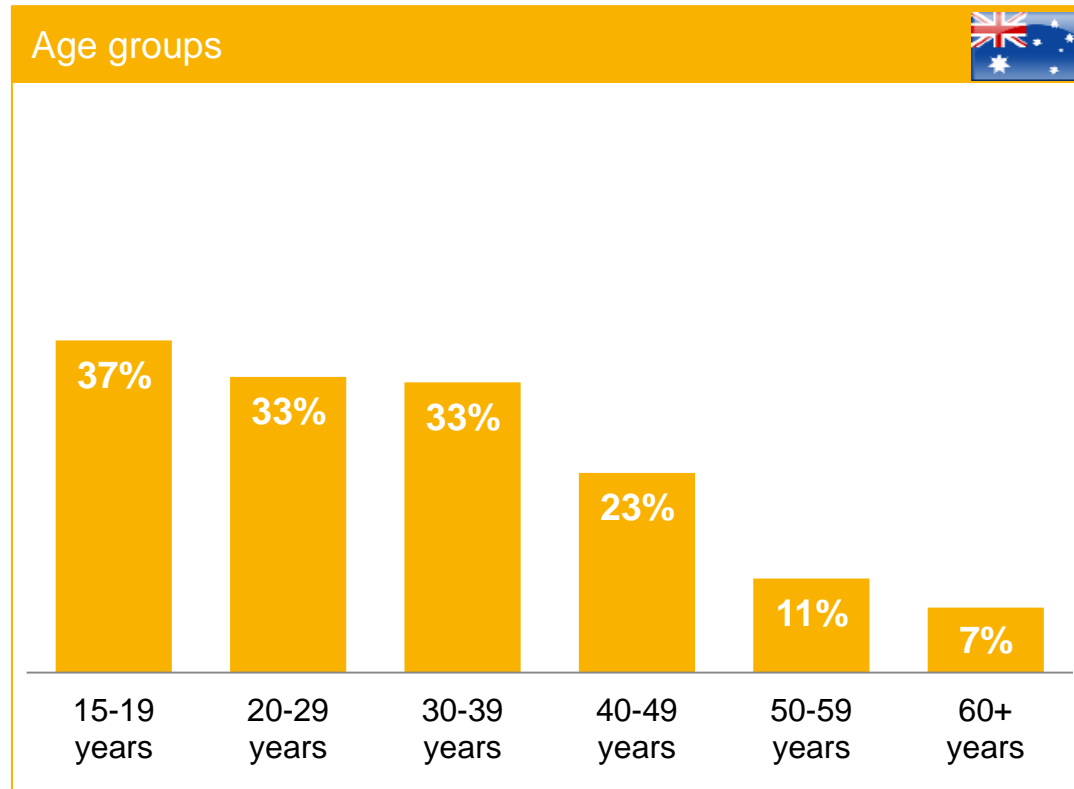
# Comparing prices: a more evenly spread behaviour across age groups



Source: GfK survey among 25,000+ mobile users (ages 15+) in 23 countries – rounded

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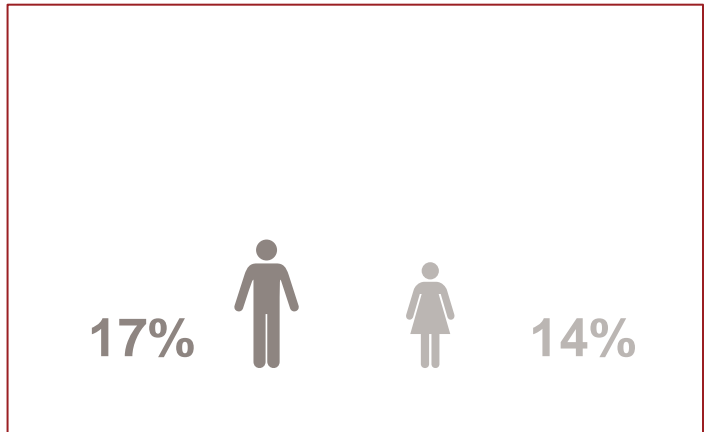
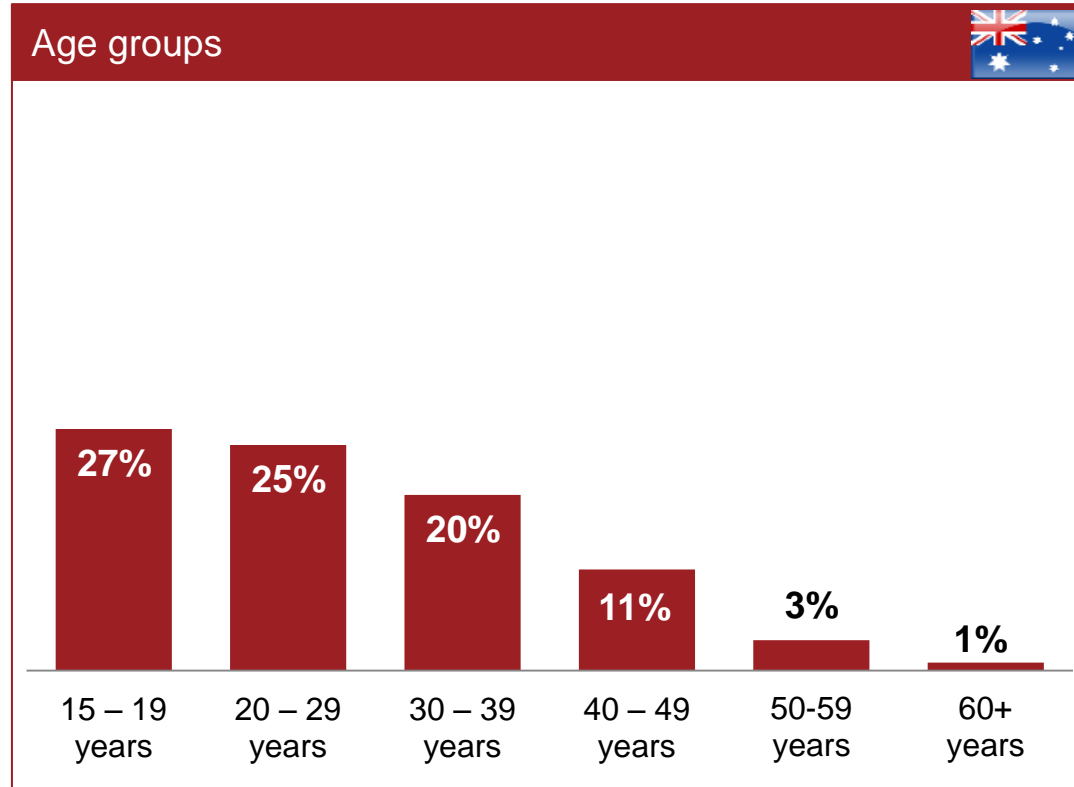
Take pictures of advertisement / information about products:  
Slightly younger skew but not by much.



Source: GfK survey among 25,000+ mobile users (ages 15+) in 23 countries – rounded

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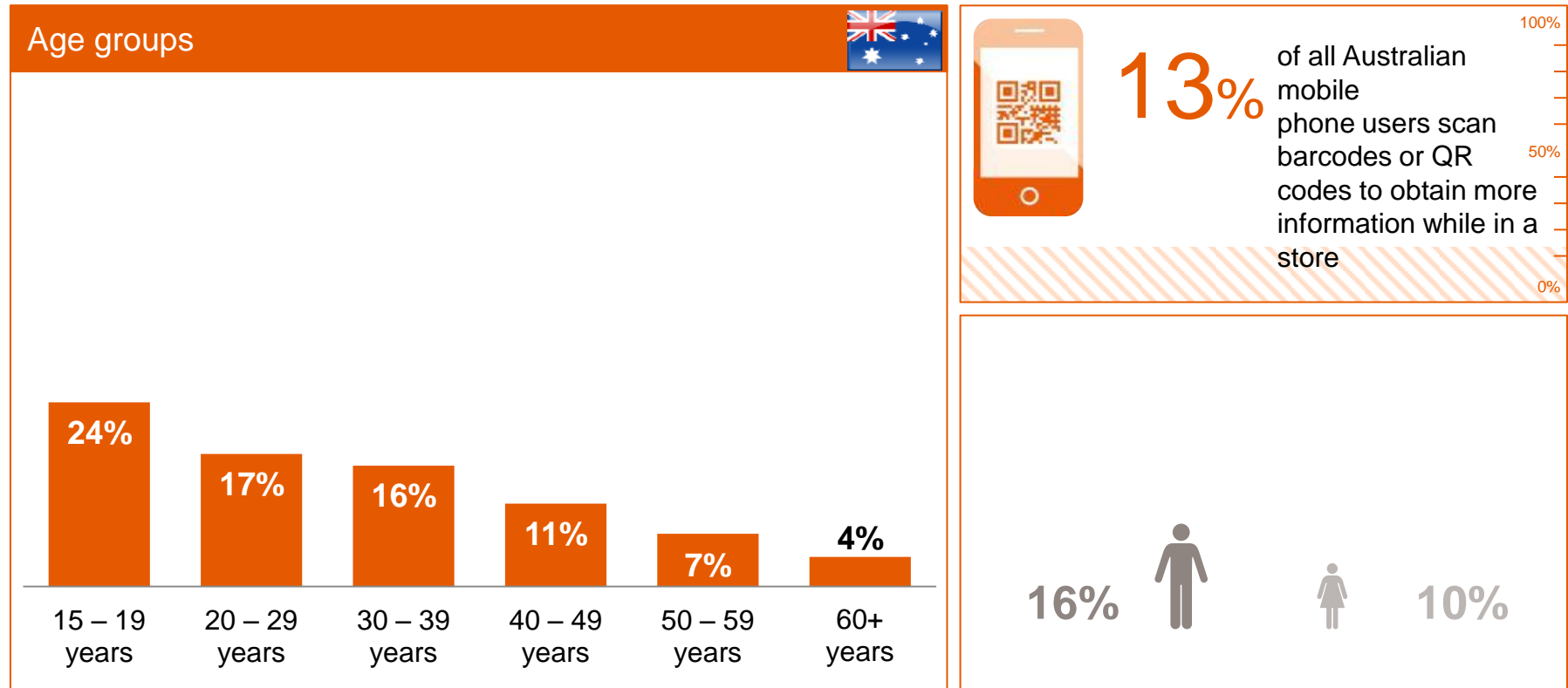
# Buy products through an application (app) on their device: Two youngest age groups



Source: GfK survey among 25,000+ mobile users (ages 15+) in 23 countries – rounded

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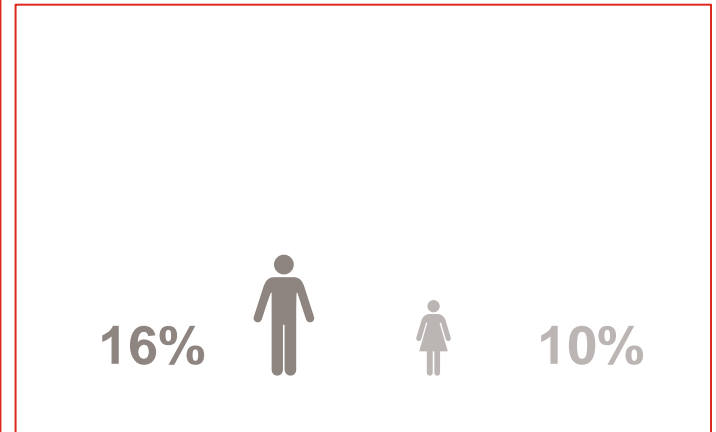
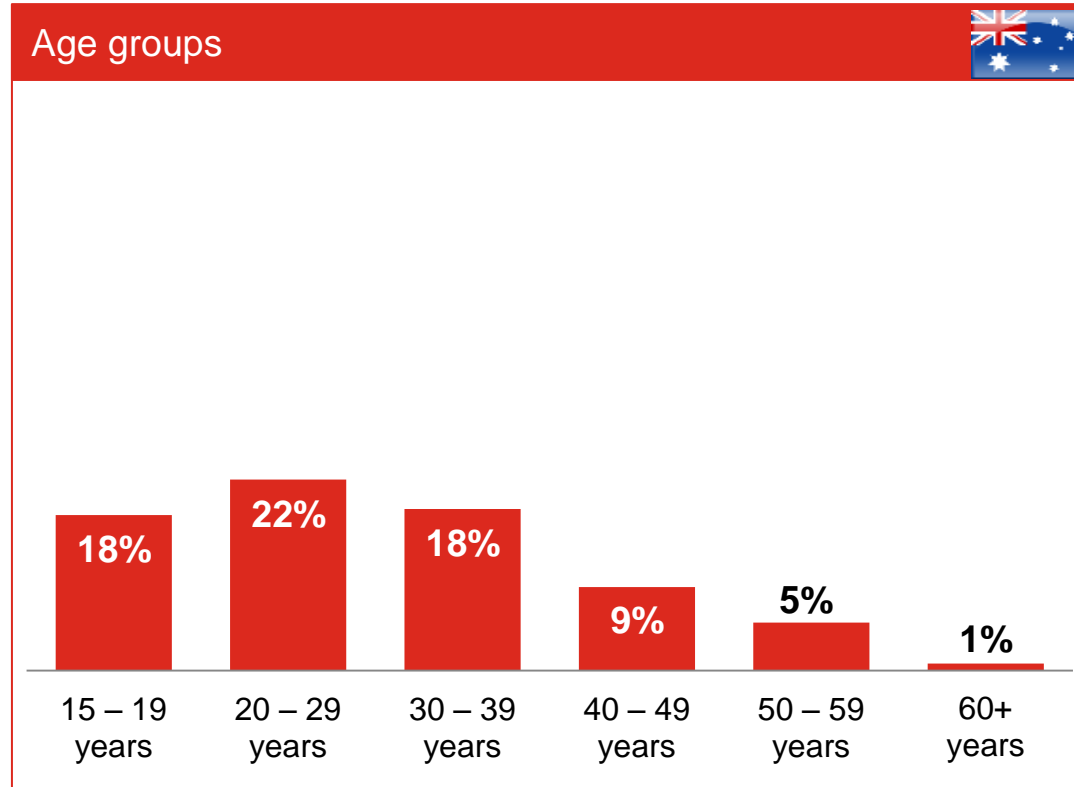
Scan barcodes or QR codes to obtain more information:  
And the youngest age group here, and male skew



Source: GfK survey among 25,000+ mobile users (ages 15+) in 23 countries – rounded

© GfK June 11, 2015 | Young, Ethical, Mobile Shopping – POPAI PDS

Buy products through the store's or another website whilst instore:  
Even spread in the first 3 age groups, and skew male



## 2. What are young shoppers doing now?



## It's as much about the physical store as online or mobile

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# 1

Shoppers aged 16-21 are significantly more likely to say that they only buy online from shops that have a physical store

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# 2

Experiencing the product is most important for high ticket items. 16-21 year olds were more likely to shop exclusively in stores for mobile phones

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More young people say they will only buy from retailers that have a physical presence.

---

1

Younger shoppers are slightly more likely than older people to shun shopping online altogether, however only a small percentage of 16-21 year olds never shop online.

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2

In every single retail category, shoppers aged 16-21 are significantly more likely to say that they only buy online from shops that have a physical store.

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3

The gulf is widest in the personal electronics category, where 12 percentage points separate younger and older shoppers (26% and 18% respectively say they would only buy online from shops that have a bricks and mortar presence).

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# The shopper of the future: Why young shoppers won't turn their backs on physical stores



When deciding which shops to buy from online which of the following statements would you agree with?



I only buy from online shops that also have physical stores

I almost only buy from online shops that have physical stores

I see it as a benefit to buy from online shops that have physical stores but I am happy to consider buying from an online-only retailer if necessary

I do not care if an online retailer has physical stores I buy from where is most convenient / has the best offer

I do not buy online



† all figures from GfK's Global Young Shopper Survey which explores current and future shopping behavior and use carried out in UK, Germany, Italy, South Korea, Brazil, Russia, India, China and South Africa. Total sample of 7,265 includes 5,000 16-21 year olds.

# Retailers must join the dots to satisfy the omnichannel generation – and their customer journeys



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1

Young shoppers are an omnichannel generation, expecting a seamless experience between the two environments.

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2

Two thirds think that retailers should provide customer support in stores, even if they have bought online.

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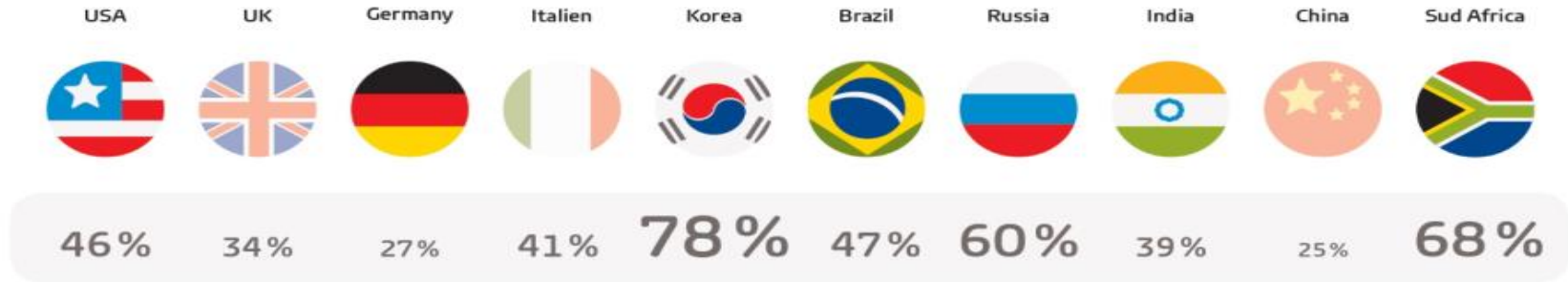
3

This means retailers must offer a fully integrated service, with products and information available across all channels. Young people expect to be able go online to check stock in a physical store, to return their online purchases to physical stores, and to access customer support wherever and whenever they need it.

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In 7 out of 10 markets we researched, 16-21yos were likely to shop exclusively in PHYSICAL stores for mobile phones



Source: all figures from GfK's Global Young Shopper Survey which explores current and future shopping behavior and was carried out in US, UK, Germany, Italy, South Korea, Brazil, Russia, India, China and South Africa. Total sample of 7,266 includes 5,000 16 – 21 year olds.

## Takeouts: Online shopping is not the default option for young shoppers

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1

Retail markets are not progressing relentlessly towards 100% e-commerce. Instead, physical stores and virtual shopping are likely to co-exist with improved synergy, supported by solutions such as Virtual Fitting Rooms and Click & Collect.

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2

While they are completely at ease shopping on mobile phones and tablets, 16-21 year olds continue to value visiting a physical store, particularly when they are purchasing more expensive and higher engagement items. They also see a shop as the place to go for customer support, regardless of where an item was bought. It is essential that retailers understand these attitudes, and the nuances within each category, if they are to meet the demands of the next generation of customers.

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## Takeouts: Young, Ethical, Mobile – the same?

**ETHICAL &  
ENVIRONMENTAL?**

**Sort of**



**MOBILE INSTORE  
SHOPPING?**

**Absolutely!**



**ONLINE SHOP BY  
DEFAULT?**

**No!**



## Data Sources

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1

Mobile Shoppers, Ethical Shoppers: GfK ConsumerLife. 25,000 – 28,000 shoppers globally in 22 – 28 countries depending on topic. Average sample n = 1000 per country. Australian sample n = 1000

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2

Young Shoppers: GfK Global Young Shopper Survey, total sample n = 7,266 including 5,000 16-21 year olds.

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