EXECUTIVE SUMMARY

July 2015

The "*Omnichannel Shopper*" and their new consumer goods purchasing practices

Are there new consumer goods purchasing practices?

Distribution has widely been reinvented and shoppers have followed this shifting dynamic with, for some, obvious enthusiasm.
68% of shoppers say they have changed their purchasing habits in recent years.

- They are increasingly using the Internet (22%)
- The drive-in has revolutionised their habits and changed their expectations (19%)
- Their usages of conventional stores are changing (16%)
- And the crisis is forcing them to buy differently (19%)

The shoppers interviewed showed a certain interest in new purchasing practices (subscription, comparison ...) especially for **routine** shopping with Amazon.

Is there an "Omnichannel shopper"?

On average, for consumer goods categories, shoppers have used 2.1 channels during their last 10 purchases.

- 61% are "one main channel" users (1 channel): young families and families
- 26% are "plurichannel" users (2 to 3 channels): silver surfers and "budgetary constraints"
- 13% are "multichannel" users (more than 4 channels): hyper connected, urban and in a hurry, as well as exclusively omnichannel (2%) for whom "*shopping is a full-time job*!" The latter are players, shopping strategists, searching for good deals, they use all the distribution channels at their disposal, in store by day and on the Internet by night...

In summary, 1 in 3 Shoppers is already omnichannel for some of their routine purchases for which they use over 3 purchasing channels. This may of course vary for the same individual depending on the categories, the occasions, the moments.
This omnichannel shopper presents a profile characteristic of an "early adopter".

An informed and demanding shopper

Whatever their preferences, their lifestyle or their degree of "*omnichannelness*", the study shows that the informed consumer has become a ***demanding shopper*** with extremely high requirements towards the channels on a majority of the criteria: quality, value for money, availability, choice, time flexibility ... They know the channels perfectly well and they know exactly what to expect of each one, what they can and cannot find there.

Shopping strategies

All shoppers have developed a strategy for their consumer goods purchasing. This can be:

- **narrow** (concentrated on a small number of channels) vs **wide** (more diversified channels)
- **fixed** (by inertia and / or lack of motivation to optimize this) vs **evolutive** (for those who are willing to invest their time to adapt their strategy to the new possibilities of the offer)

Mixing channels (taking information from the Internet followed by in-store purchase) is seen as only "worthwhile" for products with a value higher than that of routine shopping...

The **reverse mix** (in-store search followed by purchase over the Internet) appears more frequent, but it is reserved for certain categories and is often motivated by the unavailability of the desired product in store…

Shopping is classified into 3 groups: chore purchases, pleasure purchases, purchases for storage. **80% of purchases of consumer goods are associated with the notion of pleasure.**

The sample has identified 7 groups of shoppers:

- ***Efficient (13%)*** *"Internet is convenient for filling up, for all shopping; no need to see, feel, touch the products; as much fun shopping on the Internet as in-store; chore of shopping; gain time ; temptations in-store. "*

- ***Web aficionados (11%)*** *"Internet is choice, it's cheaper, it's convenient; I love being delivered, fast delivery, chore of routine shopping."*

- ***Pure Sensorial (13%)*** *"Seeing, touching, feeling the products; product quality as a selection criterion; need accurate information on the products; purchase according to the desires of the moment; pay more for quality; pleasure of shopping; important choice of products / brands "*

- ***Resourceful (13%)*** *"I like to take my time when I shop; pleasure of shopping; I like shopping, wandering around the aisles; I pay attention to the price of products; I go to several stores to find the bargains ... "*

- ***Traditional (17%)*** *"No routine shopping on the Internet; not more choice on the Internet; I like to go into the store, not the pleasure of this on the Internet; not interested in large quantities at cut-prices on the Internet; seeing, touching, feeling the products is important, being able to test them, try them; Internet is for shopping, not for routine shopping... "*

- ***Scouts (16%)*** *"Don't respect the planned budget; struggle to resist temptation; products in advance at home; ready to buy large quantities if discounts; take advantage of promotions to stock up; finding great deals is a game; I take my time for shopping ... "*

- ***Disengaged (16%)*** *"Don't like to wander around the store; chore of routine shopping; no purchases according to desires; not in search of innovations: no difficulty in resisting temptation; no time for shopping; not tempted in stores; do not trust the Internet..."*

In conclusion

The universe of routine shopping still seems to be "binary". 39% of shoppers **remain attached** to the physical and 24% are already elsewhere.

At one extreme, the "Traditional" are emblematic in their purchasing patterns and selection of channels for the pleasure of the senses; at the other extreme, users of digital.

Technology is making the bridge between the two worlds (local vs global, virtual vs physical).

The question of the ability and willingness of shoppers to mix channels is obsolete. The real challenge for professionals is to live up to their demanding requirements through a consistent service offering, whatever the channel, which is easy to use and somehow "human" to respond optimally to their new expectations.

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