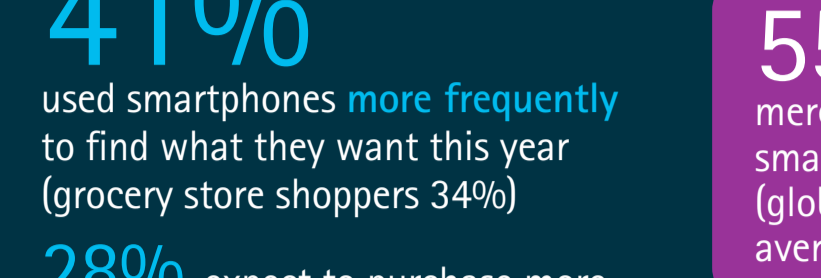


2016 Global Research: Customers are shouting, are global discount, mass merchant and hypermarket stores listening?

High performance. Delivered.

Accenture's new survey of global discount, mass merchant and hypermarket store shoppers reveals a rising intensity that's forcing companies to adapt more quickly to the shifting retail reality that defines the customer experience. Below are the key findings from our research.

1 More discount, mass merchant and hypermarket store shoppers are shopping on the go



41%

used smartphones **more frequently** to find what they want this year (grocery store shoppers 34%)

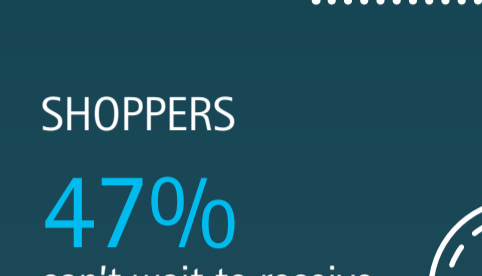
28% expect to purchase more via smartphones this year

46% of shoppers find it easy to purchase via mobile devices



55% of global discount, mass merchant and hypermarket stores have smartphone apps with purchase capabilities (global grocery store average 39%; global average across all segments 58%)

2 Discount, mass merchant and hypermarket store shoppers are demanding more services via their mobile phone while shopping in store



Discount, mass merchant and hypermarket store shoppers are demanding more services via their mobile phone while shopping in store

SHOPPERS

47%

can't wait to receive real-time promotions (up 8% from last year)



GLOBAL DISCOUNT, MASS MERCHANT AND HYPERMARKET STORES

14%

can send real-time promotions (global average across all segments 7%)

43%

want the ability to automatically credit coupons and discounts (up 8% from last year)



24%

can automatically credit coupons and discounts at checkout (global average across all segments 16%)

38%

want to use shopping list / item locators / navigators (up 8% from last year)



45%

have apps with shopping list capabilities (global average across all segments 31%)

3 Retailer capabilities that were nice to have are becoming must haves

What would most improve the connected shopping experience?

SHOPPERS

26%

The ability to check product availability online prior to going to the store

2015

46%

2016

18%

The ability to easily order out of stock items in stores

2015

27%

2016

GLOBAL DISCOUNT, MASS MERCHANT AND HYPERMARKET STORES

24%

provide store-specific stock availability information



45%

have store staff who can order out of stock items for customers

10%

have in-store kiosks that can be used by customers to order out of stocks



4 Percentage of discount, mass merchant and hypermarket store shoppers who are satisfied with...



Shoppers expect more...

SHOPPERS

Expectations were met:

49%

Return policies

Were not satisfied:

11%

48%

Delivery

11%

47%

Interaction with store staff

17%

GLOBAL DISCOUNT, MASS MERCHANT AND HYPERMARKET STORES

52%

allow shoppers to return online orders to the store for a refund or replacement (global average 39%; global average across all segments 57%)

69%

have next day delivery options (global average across all segments 56%)

21%

have same day delivery options (global grocery store average 11%; global average across all segments 11%)

59%

enable delivery scheduling on a specific day (global grocery store average 67%; global average across all segments 49%)

28%

have click & collect capabilities (global average across all segments 39%)

55%

have knowledgeable sales staff

3%

with access to tablets in order to check purchase history

5 Discount, mass merchant and hypermarket store shoppers are online more to find what they want to purchase

Shopping for GROCERIES

60%

2015

66%

2016

Shopping for HEALTH AND BEAUTY PRODUCTS

72%

2015

79%

2016

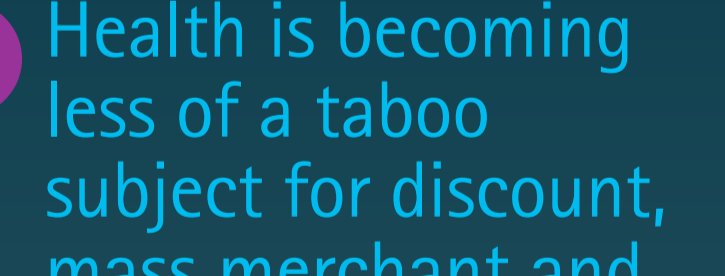
Going online to purchase (global average across ALL segments)

76%

2015

80%

2016

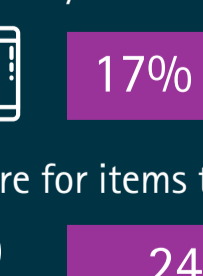
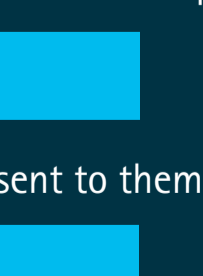


6 Health is becoming less of a taboo subject for discount, mass merchant and hypermarket store shoppers



7 Discount, mass merchant and hypermarket store shoppers want retailers to improve the customer experience (without invading their privacy)

Percentage of SHOPPERS think that the following are:



Items automatically discounted for loyalty points and discounts

75%



7%

Websites optimized by device

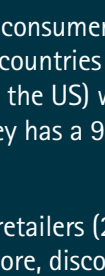
56%



17%

Promotional offers sent to them in store for items they are considering

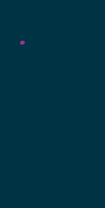
49%



24%

Reminders of what they need to replenish while shopping in store

41%



26%

Websites that provide recommendations based upon social media activity

34%

37%

Retailers showing feedback left by their friends on products they're considering

31%

37%

Sales associates who know what is in their online wishlist/basket

30%

42%