

2016 UK Research:

Customers are shouting, are retailers listening?

High performance. Delivered.

Accenture's new survey of shoppers in the UK 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 shoppers are shopping on the go



30% used smartphones **more frequently** to find what they want this year (global average 40%)

17% expect to purchase more via smartphones this year (global average 27%)

Only **50%** find it easy to purchase via mobile devices (global average 48%)

20% expect to use their tablet more to purchase this coming year

92% of retailers have smartphone apps with purchase capabilities (global average 58%; US average 74%)

56% of retailers have tablet apps with purchasing capabilities

2



Shoppers are demanding more services via their mobile phone while shopping in store

SHOPPERS

38% can't wait to receive real-time promotions (global average 47%)

27% want the ability to automatically credit coupons and discounts (global average 42%)

30% want to use shopping list / item locators / navigators (up 8% from last year)

RETAILERS

None can send real-time promotions (global average 7%)

8% can automatically credit coupons and discounts at checkout (global average 16%)

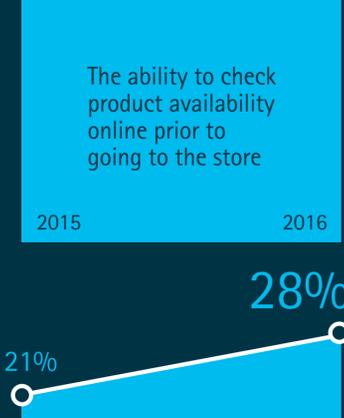
8% have apps with shopping list capabilities (global average 31%); 0% have virtual store display capabilities for the mobile phone

3

Retailer capabilities that were nice to have are becoming must haves

What would most improve the connected shopping experience?

SHOPPERS



RETAILERS

40% provide store-specific stock availability information (global average 28%)

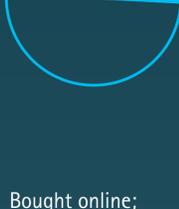
84% provide the ability to order out of stock items via mobile phone (global average 41%)

4

More shoppers are taking advantage of new fulfillment methods

SHOPPERS

Bought in store; had items shipped home more often



Bought online; picked items up in store more often



RETAILERS

80% have buy in store ship to home capabilities (global average 58%)

76% have click & collect capabilities (global average 39%)

5

Shoppers are online more to find what they want to purchase



Going online to purchase across all segments



GLOBAL AVERAGE



Shopping for health and beauty products



UK SHOPPERS



Shopping for groceries



UK SHOPPERS

6

Only a few brands have influenced shopper lifestyles

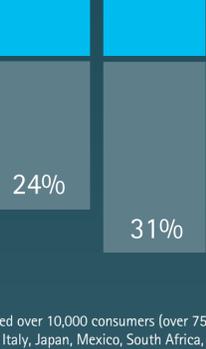


In the UK, Google and Amazon had the biggest impact on shopper lifestyles. Brands that have not had that much impact: Apple, Facebook, Netflix, Uber.

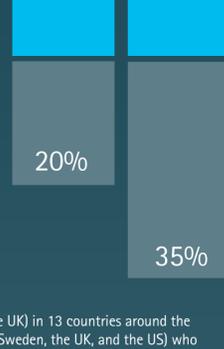
DID change their lifestyle

Did NOT change their lifestyle

UNITED KINGDOM



GLOBALLY



Global sample of consumers: Accenture surveyed over 10,000 consumers (over 750 in the UK) in 13 countries around the globe (Brazil, Canada, China, France, Germany, Italy, Japan, Mexico, South Africa, Spain, Sweden, the UK, and the US) who have shopped online and in stores in the last three months who indicated regular internet and smartphone use. This survey has a 95% confidence level with a margin of error of +/- 3.6%. Survey conducted in November 2015.

Global retailer benchmark: Accenture benchmarked over 160 retailers (25 in the UK) representing the apparel, consumer electronics, department store, discount/mass/hypermarket, grocery, drug/health & beauty, and home improvement sectors in 10 countries: Brazil, China, Japan, UK, US, Canada, Spain, Sweden, Italy, Germany.