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Digital
Shopper
Relevancy
Research Report 2014

Understanding and anticipating the changing perspectives of Digital Customers

People matter, results count.

Introduction

» Understanding Shopper Psychology

» Digital Shopping Evolution

Introduction

Understanding Shopper Psychology | Digital Shopping Evolution

Introduction

Understanding Shopper Psychology

The way that consumers behave and shop is changing considerably. Shoppers now have a multitude of new options at their disposal to find just the right solution for their specific needs. Moreover, the psychology of their decision-making is also changing, with the application of new sets of criteria to guide their purchasing, and their loyalty to any one of 1,000s of different consumer brands being stretched and strained.

Against this context, the physical presence of a retail store has remained important in the purchase journey, but digital channels are increasingly triggering many kinds of new buying-behavior considerations by consumers.

Being relevant to shoppers is key

For some time now, the complexity of these additional shopping options and multi-layered journey online has forced retailers and Consumer Product (CP)

companies to evaluate, on an increasingly frequent basis, the relevancy of the channels and media selected to communicate with their consumers.

The concept of Digital Shopper Relevancy is about retailers and CP companies understanding, anticipating and addressing the appropriate set of shopper needs and perceptions across the buying journey, from access to service provision. The criteria have evolved from the traditional criteria for physical channels to include the additional criteria for digital channels in the mix.

When categorizing all possible consumer considerations into five attributes (Access, Experience, Price, Product, Service) it becomes clear how shopper considerations are evolving with the inclusion of specific criteria in relation to digital channels in each of those attributes, see Figure 1.

Introduction

Understanding Shopper Psychology | Digital Shopping Evolution

Companies need to be relevant to consumers in the context of how they live their lives, and to provide a point of differentiation from both new and existing competitors. But the key question for retailers and CP companies is: where to focus, where to differentiate? Our DSR research and methodology helps retailers and CP companies to gain this insight into the needs and perceptions of the shoppers they want to serve, and helps them make these key decisions on focus and competitive positioning.

Changing market dynamics

Since our study of 2012, we have witnessed a significant change in both the market and market behavior, most notably: the widespread adoption of the smart phone for calls, texts, entertainment and transactions ; the explosion in the use of social media channels such as Facebook and Twitter to publish and consume real-time information ; and the issues surrounding Big Data. What this has led to is an ever-larger digital footprint left by a sizeable proportion of society, with a growing trail of personal data and consumer concerns about privacy.

Figure 1: An illustrative example of shopper needs, considerations and perceptions across the five attributes

▶ Illustrative	Access	Experience	Price	Product	Service
Traditional Relevancy Criteria for Physical Channels	▶ Easy to reach stores ▶ Easy to navigate stores ▶ Maximum opening hours	▶ Friendly and clean store ▶ No damaged goods in store ▶ Inspirational Atmosphere	▶ Competitive pricing ▶ Compelling promotions	▶ Wide and deep assortmen ▶ Freshness/Quality Availability (no stock-outs)	▶ Customer Service ▶ Complaints handling/ return policy ▶ Loyalty program
Additional Relevancy Criteria for Digital Channels	▶ Buying anytime, anywhere, anyhow (mobile, social, web) ▶ Flexible delivery- options (home, store-pick-up etc.) ▶ Mobile in-store Shopping support	▶ Inspirational Content ▶ Community engagements (share experiences) ▶ Social Shopping	▶ Dynamic Pricing ▶ Location-based pricing ▶ Personalized Pricing ▶ Solution Pricing ▶ Price Matching	▶ Wider and deeper assortment ▶ Advanced/visualized product information and (usage) advice ▶ Product Comparison	▶ Personalized offers ▶ Technology-enabled staff – support in-store ▶ Interactive service via digital channels (e.g. click-to-chat, social media)

Introduction

Digital Shopping Evolution

18,000
Interviews

18
Countries

So how have these economic, political factors impacted on consumer attitudes and action, and how can a retailer or CP company know which the most relevant value attributes to digital shoppers are? With such a rapidly developing market, it is difficult for retailers and CP companies to gather and analyze the latest market information across a number of sectors and countries.

Capgemini has been tracking consumer shopping since 2002, surveying over 50,000 consumers worldwide, and gathering insights into the changing patterns of purchasing behavior from originally predominantly traditional physical stores to now multi-channel shopping.

Our most recent research, *Digital Shopper Relevancy Report 2014*, surveyed more than 18,000 digital shoppers from 18 countries. Our aim: to provide in-depth information on the key role technology plays in the buying behavior of online shoppers and provide insight to retailers and CP manufacturers to help them shape their approach to key market segments in today's fast-paced environment now and in the future.

Leveraging the benchmark set by our previous report, *Digital Shopper Relevancy 2012*, we kept many of the research parameters: digital and physical channels; five product categories (food, health and personal care, fashion (clothing, footwear and accessories), DIY, and electronics); and interviews with consumers who had used digital technology during the shopping process in the last three months.

Our online questionnaire covered many of the same topics as in 2012, to understand how a range of channels and devices are used and valued as part of the shopping journey, segmentation of shoppers based on behavior and preferences, and differences between mature and high-growth (maturing) markets.

We also expanded the geographical scope of the data collection, with additional countries, providing a sample representing high-growth as well as mature markets. The 18 countries were: Australia, Brazil, Canada, China, Finland, France, Germany, India, Italy, Japan, Mexico, the Netherlands, Portugal, Russia, Spain, Sweden, the United Kingdom and the United States. In each country we interviewed 1,000 online shoppers, with a balance across the age group, sexes, employment and education; in all 18,000 respondents in total, our largest survey to date.

We hope you find the research, analysis and commentary interesting and that it both informs your own customer experience decisions and maybe even challenges some of your current thinking.

We are sure that Capgemini's Digital Shopper Relevancy Research 2014 will provide organizations with valuable insights into today's digital shopper, leading to a better understanding of how and where to invest in capabilities across all channels.

Executive Summary

Executive Summary

IIn the period since our last report in 2012, the multiple channels available to the consumer, across a broad range of product categories, have continued to expand, and it is clear that shoppers are continuing to drive the pace of change in retail, a change that is both distinct and steady.

However this dynamism challenges the retailer and consumer products producers to respond, particularly as consumers are no longer loyal to a particular channel, but pick and choose according to the specific stage in their purchase journey or their shopping preferences. Our DSRS seeks to provide some of the answers to these challenges.

Key Research Findings of the Digital Shopper Relevancy Report 2014

- **Social media: overhyped?**
  Social media as part of the shopping journey has shown a comparative decline since 2012. Less importance is being placed on following retailers on social media (such as Twitter and Facebook), finding out about new products through blogs, and participating in online retail customer communities. Conventional retail store experience, Internet,

email, smartphone apps, or the use of technologies in-store are rated significantly higher. Fewer shoppers expect the use of social media will change their shopping in the future.

- **Physical store reigns - for now**
  For point-of-sale, the physical store is still the favored destination for global shoppers, particularly in mature markets. For transactions, 72% of respondents, in all categories except for electronics, see the store as important or very important, compared to 67% for the Internet.

- **Digitally-savvy, high-growth markets**
  High-growth markets show a significantly stronger preference for digital technologies - smartphone, social media and in-store technology - than all the thirteen mature markets polled, particularly for sourcing product information, price-comparisons and purchasing. They are also more interested in receiving personalized offers and recommendations, compared to low interest in Western Europe.

Executive Summary

- **Distrust over use of personal data**
  Globally, over 33% of consumers don't feel that they are currently being provided with clear information by retailers on how their personal data is used. Personal expectations regarding retailers are low: one in four respondents doesn't expect their favorite retailers to know their history to provide a better service, and 33% do not agree to their social media data being used by retailers.

- **No 'One' Digital Shopper**
  We identified seven new digital shopper profiles, across mature and high-growth markets, which use using digital channels differently:

Mature Markets

(Australia, Canada, Finland, France, Germany, Italy, Japan, Netherlands, Portugal, Spain, Sweden, the United Kingdom and the United States)

- **Reluctant Digital Shoppers** (11% of total mature market sample): Not comfortable using technology, prefer physical stores and avoid social media and smartphone as shopping channels

- **Value-Conscious Digital Shoppers** (29%): Prefer in-store shopping, use Internet and email, but less comfortable using smartphones, tablets and social media

- **Socially-Engaged Digital Shoppers** (41%): Heavy users of digital technologies, comfortable using social media and relaxed entrusting their data to retailers

- **True Digital Shoppers** (19%): Purchase online the most frequently, use apps to compare products, track delivery and are happy sacrificing personal data for customized deals.

High-growth Markets

(Brazil, China, India, Mexico and Russia)

- **Digitally-Indifferent Shoppers** (23% of total high-growth market sample): Uninterested in digital technologies, prefer stores, and share personal data with retailers, but not via social media

- **Interactive Digital Shoppers** (50%): At ease with all digital technologies, regular online shoppers, and love retailers that embrace technology like QR codes and mobile apps

- **Technophile Digital Shoppers** (27%): Willingly adopted digital technology, make online purchases regularly, trust retailers with personal data, but want opt in/out flexibility.

- **Fashion showing the way**
  The category with the highest degree of online momentum is Fashion with 9% growth; 61% of respondents indicate that they had shopped online for fashion items in the last six months. This contrasts with minimal growth in the other product categories, which have remained largely unchanged since 2012. The home handyman is the least likely to have purchased online, more than half purchased electronics, 44% bought health products, and 3 in 10 food online.

Executive Summary

- **Internet – the preferred channel**
  Overall our report highlights the trend since 2012 of the continued importance of the Internet as the preferred channel to inform retail decisions (compared to smartphone apps, social media or in-store technologies), with 75% of respondents saying it was important or very important to shopping research. Internet sites and email are also the preferred digital channels for consumers to conduct many of their shopping experiences, with greater relevancy for large or specialist purchases like electronics and DIY products.

- **The Future Use of Digital Channels**
  Looking three years ahead, shoppers expect increased flexibility in their shopping, with digital technologies playing a major role. For example consumers, especially in emerging markets, expect ordering online direct from brand manufacturers to change their shopping process considerably in the next three years, while 51% predict that they will spend more money online than in-store.

  Moreover, they anticipate more in-store browsing prior to buying online, and also a limited desire for human contact in the store. Despite that, the physical store will remain important particularly in mature markets, but with significant improvements in the in-store technology.

  Financially, consumers will increasingly look for rewards for their loyalty and recommendations, and they expect online prices to be lower than those in physical store and catalogs, with 72% agreeing or strongly agreeing.

Conclusion

This is a momentous time in the industry with new technologies and channels increasingly converging and transforming the way we shop and consume. These new technologies raise the consumers' expectations, and demands, of a seamless customer experience - irrespective of channel, device, location or activity, as the power in the transaction relationship continues to move steadily towards the consumer.

Therefore, for retailers and consumer products companies, it has never been so critical to understand and anticipate the changing perspectives of their digital customers and to maximize the opportunities and manage the threats. The challenge is to identify the attributes that are the most relevant to the target customer, and for retailers in particular to balance in-store and online investment, and between personalization and intrusion.

Most companies are already on their 'digital journey' in some shape or form. However, many are uncertain whether they are truly addressing the changing needs of their consumers, the right priorities or the right initiatives.

Capgemini's Digital Shopper Relevancy insights can help retailers and consumer goods companies better understand shopper behavior and deliver a more tailored all-channel experience. This helps them to become more relevant and differentiated to the shoppers they want to serve.

We now provide more in-depth data and analysis of these findings of today's digital shopper, their behavior and preferences across the All-Channel Shopping Journey.

Key Findings

- » Social Media: overhyped?
- » Physical store reigns
- » Digitally-savvy high-growth markets
- » No 'One' Digital Shopper
- » The Privacy Issue
- » Fashion showing the way

Key Research Findings

Social Media: overhyped? | Physical store reigns | Digitally-savvy high-growth markets | No 'One' Digital Shopper | The Privacy Issue | Fashion showing the way

Key Findings

Social Media: overhyped?

"Separating hype from reality is critical for emerging digital channels like social media and smartphone apps". Just one conclusion from our 2012 Digital Shopper Relevancy survey, and in 2014, we are starting to see this separation taking place and that the social media hype in the consumer goods and retail sector has not materialized.

Our study concludes that consumers consider social media to be a less important part of their customer journey – from awareness to post-sale activity – compared to two years ago (see Figure 2).

These responses indicate not only a comparative decline, but also demonstrate that social media globally is less important to the shopper journey compared with conventional retail store experience, Internet, email, smartphone apps, or the use of technologies in-store

This is further evidenced in our respondents' low rating of the importance of social media compared to other channels to:

- Find out about new products through recommendations in blogs, social media and consumer review websites;

- Follow retailers through for example on Twitter and Facebook;

- Shop with friends online, looking and selecting together, although physically apart;

- Share reviews about products with other consumers;

- Share comments about products with the retailer and participate in online customer communities set up by retailers.

Key Research Findings

Figure 2: The change in the importance of social media 2012 to 2104 across the shopper journey

Trend	Awareness		Choice		Transaction		Delivery		Post Sales	
	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014
Food	2.86	2.83	2.78	2.74	n/a	2.56	n/a	2.59	2.82	2.73
Health	3.15	3.07	3.02	2.98	n/a	2.79	n/a	2.80	3.03	2.91
Fashion	3.22	3.14	3.13	3.06	n/a	2.88	n/a	2.87	3.12	2.97
DIY	3.11	3.06	3.04	3.00	n/a	2.86	n/a	2.87	3.04	2.94
Electronics	3.20	3.00	3.07	2.89	n/a	2.68	n/a	2.68	3.04	2.80
Total	3.09	3.02	2.99	2.93	n/a	2.75	n/a	2.76	2.99	2.87

Based on a scale of 1 to 5 where 1 = not at all important, and 5 = extremely important

Mean score = <2.0> = ● 2.0-3.0 = ● >4= ●

Key Research Findings

Social Media: overhyped? | Physical store reigns | Digitally-savvy high-growth markets | No 'One' Digital Shopper | The Privacy Issue | Fashion showing the way

The importance of the smartphone, as a digital channel, by contrast has grown in importance over the same period . This is interesting because, as over the past two years, smartphones and social media have interchanged in importance as a channel supporting shopping.

The use of social media throughout the shopping journey is certainly not insignificant; it is most relevant in the 'awareness' and 'choice' phases of shopping journeys (particularly in fashion), but much less in 'transaction, delivery and post-sales' stages

Further scrutiny reveals that a global view masks regional variations. Countries such as India, Mexico, China and Brazil consistently place much higher importance on social media compared to say Finland, Sweden and UK which place the least importance on social media.

Despite the surge in Facebook's ad revenues and marketing innovations like Twitter's new 'Buy' button, there is definitely a question mark over where and how social media fits into, or adds real value in, the shopper journey.

Our report suggests that retailers and CP companies still have work to do at every stage of the purchasing journey if they are going to convince customers that social media has a useful, valuable role in buying a product or service.

Retailers and CP companies should take a realistic and pragmatic view of the return any investment in social media is likely to make. Social media certainly has its place in an advisory capacity and needs to be proactively managed, but we would caution against an over-reliance on its ability to enhance the overall customer experience.

We also identified that:

- Fewer digital shoppers expect the use of social media to change their shopping process in the future (2014, 3.35 mean importance down from 3.39); and

- Only 29% of respondents indicated that they do not mind if the retailer uses their social media data.

Key Research Findings

Social Media: overhyped? | **Physical store reigns** | Digitally-savvy high-growth markets | No 'One' Digital Shopper | The Privacy Issue | Fashion showing the way

Physical store reigns

Maybe of relief to some readers is the finding that for point-of-sale, particularly in mature markets, the physical store is still the favored destination for global shoppers, but only just, with the Internet slightly behind. When carrying out retail transactions, 72% of respondents identify the store as important or very important compared to 67% for the Internet. (Figure 3) This is true for all categories except for electronics.

Only 14% of respondents strongly indicate that physical stores have become less important for them. However, in the future, the majority of shoppers (51%) say they will spend more money online than in-store.

In addition to the smartphone's ubiquitous growth, in-store digital interactions (such as kiosks) are also popular amongst shoppers, suggesting that the introduction of more technology into retail stores would be a welcome addition to the shopping experience.

As we found 2 years ago, different channels are preferred by consumers at different points along the shopper journey. While the shop is still king when transacting, the Internet is now preferred globally, for finding product and promotion information and choosing what products to buy – ahead of the store; 75% say it is very important or important.

This is particularly evident in categories such as fashion, DIY and electronics, whereas, not unsurprisingly, in food the stores have kept their edge, no doubt because of the sensory aspects of shopping for food.

Key Research Findings

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Figure 3: The relative importance of the physical store in the purchase and payment of a product

	1 Not at all important ➝ 5 Extremely important	Mean 2014	Mean 2012
Traditional store experience	4 / 5 / 18 / 32 / 40	3.99	N/A
Internet site	8 / 6 / 19 / 31 / 36	3.81	3.80
In-store technology (such as kiosks)	14 / 10 / 23 / 30 / 23	3.37	3.41
Email (e.g. newsletters and offers)	17 / 12 / 23 / 27 / 21	3.25	3.34
Smartphones (both mobile websites and apps)	27 / 12 / 20 / 23 / 19	2.94	2.81
Social media (e.g. Facebook, Twitter)	32 / 12 / 19 / 20 / 16	2.75	N/A
Phone – via call center	35 / 14 / 20 / 18 / 13	2.59	2.70

Key Research Findings

After the transaction, online comes into own in providing post-sales service, in all categories except food where online and stores have a similar level of importance. Only 63% rate the store as important or very important as a channel to get their post-purchase questions resolved, compared to 71% rating online. Shoppers are certainly in our experience calling out for choices in returns options, 24/7 customer service, and sharing reviews.

Against this background, looking ahead the future looks less positive for the store retailer. Consumer expectations over the next three years include:

- 65% of shoppers expect the option of ordering direct from brand manufacturers (across the categories) to increase, particularly in Mexico, India and Brazil

- 53% anticipate an increase in ordering direct from a manufacturer via an app or a 3rd party app (50%)

- Over half (51%) agree that they will spend more money on-line than in the store

- 48% agree they will use stores increasingly as showrooms rather than purchase destinations

The traditional main street store remains one of the most important channels of the shopping experience, particularly for food and in mature markets, where the retail infrastructure is long-established within cities and towns and consumer thinking.

However, the predicted increase in not only ordering online, but ordering direct from the brand manufacturers signifies a continued and significant longer-term erosion of the dominance of the physical retail store, and even a shortening of the traditional supply chain.

72% say
Store is important or very important

48% agree
Store will be showroom not shop

65% expect
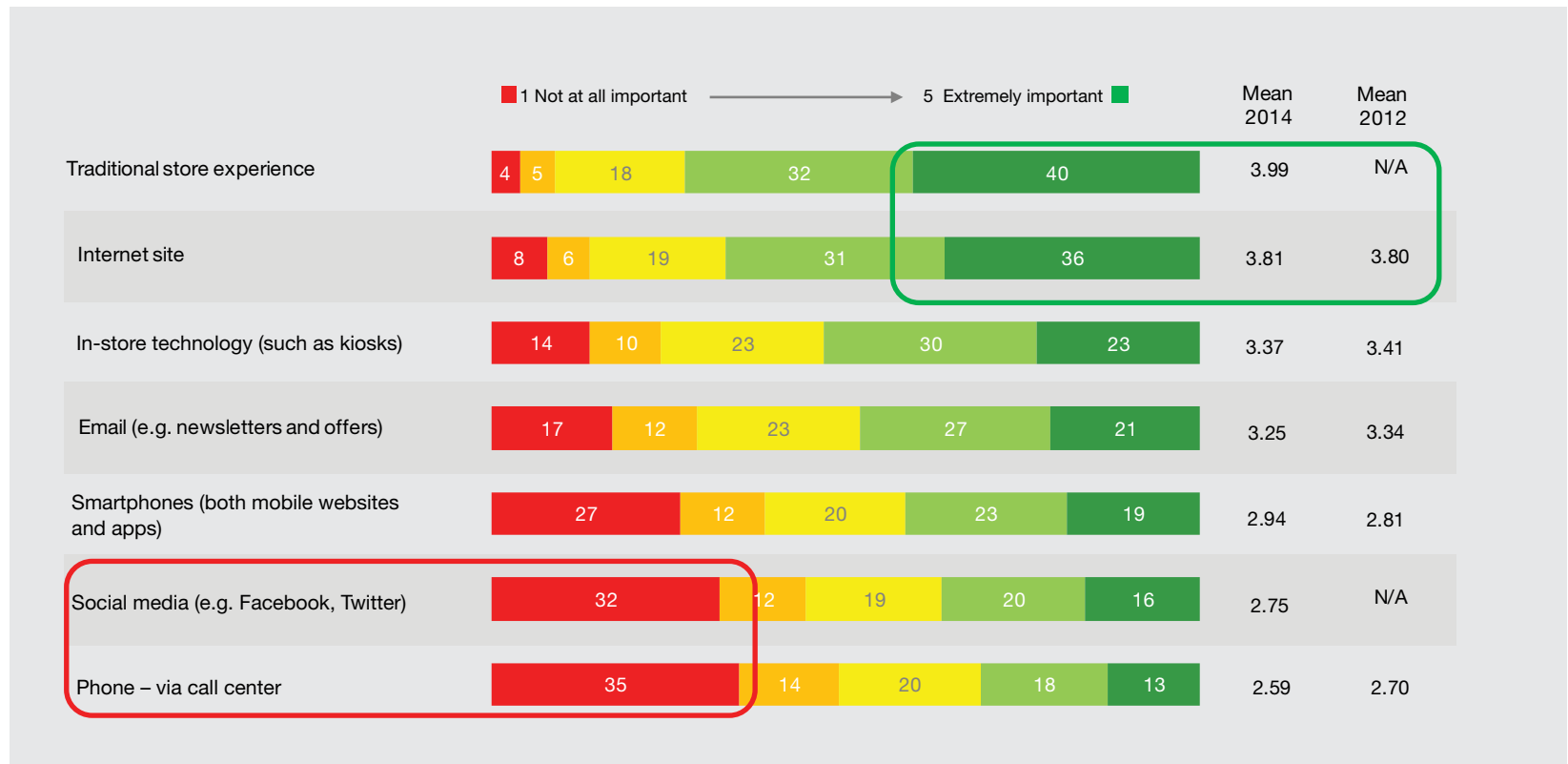**to order direct and by-pass the store**

Key Research Findings

Social Media: overhyped? | Physical store reigns | **Digitally-savvy high-growth markets** | No 'One' Digital Shopper | The Privacy Issue | Fashion showing the way

Digitally-savvy high-growth markets

As we found in 2012, there are significant differences between digital shoppers in emerging or high-growth markets and those in mature markets.

High-growth markets all show a significantly stronger preference for digital technologies than mature markets. For example, when it comes to searching for product information, doing price-comparisons and purchasing products, Brazil, Mexico, India and China all place a much greater importance on the smartphone, social media and in-store technology than all the other 13 mature markets polled (Figure 4).

Key Research Findings

Figure 4: The relative importance of the physical store in the purchase and payment of a product, by country

	Phone – via call center	Smartphones (both mobile websites and apps)	Social Media (e.g. Facebook, Twitter)	In-store technology (such as kiosks)	Email (e.g. newsletters and offers)	Internet site	Traditional store experience
Australia	2.18	2.51	2.19	3.09	2.93	3.63	4.11
Canada	2.14	2.40	2.26	3.17	2.86	3.51	4.12
Finland	1.85	2.20	1.97	2.72	2.82	3.58	3.94
France	2.28	2.48	2.30	3.18	3.03	3.60	3.78
Germany	1.98	2.52	2.19	2.86	2.85	3.44	4.08
Italy	2.79	3.30	3.10	3.74	3.60	4.00	4.16
Japan	2.60	2.72	2.56	2.91	3.11	3.65	3.45
Netherlands	1.94	2.43	2.28	2.88	2.91	3.54	3.82
Portugal	2.76	3.14	3.15	3.53	3.55	4.02	3.85
Spain	3.03	3.17	3.04	3.55	3.38	3.86	4.13
Sweden	2.25	2.43	2.04	2.84	2.81	3.35	3.49
UK	2.05	2.36	2.04	2.95	2.72	3.72	4.04
USA	2.48	2.51	2.34	3.08	2.94	3.55	4.13
Brazil	3.11	3.71	3.72	4.03	3.90	4.35	4.14
China	3.30	4.00	3.65	3.97	3.75	4.23	4.04
India	3.58	4.10	3.93	4.15	4.01	4.41	4.21
Mexico	3.22	3.80	3.73	4.16	3.82	4.28	4.22
Russia	3.08	3.18	3.07	3.78	3.47	3.91	4.07
Total	2.59	2.94	2.75	3.37	3.25	3.81	3.99

Based on a scale of 1 to 5 where 1 = not at all important, and 5 = extremely important

Mean score = <2.0 = ● 2.0-3.0 = ● >4= ●

Key Research Findings

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High-growth markets are also significantly more interested in receiving personalized offers and recommendations, with India (46%), Mexico (40%) and Brazil (38%) rating them as 'extremely important'. This is in stark contrast to the equivalent statistics for the UK (13%), France (15%) and Germany (24%); see Figure 5.

Figure 5: The relative importance of personalized offers at the Awareness stage, by country

	Receive inspirational content	Follow the retailer through social media	Find out about new products through recommendations in blogs	Receive messages and offers on mobile device based on location in the store	Receive messages and offers on mobile device based on location outside the store	Personalized offers and recommendations from retailers and manufacturers	Use a mobile application to support your shopping inside the physical store	Check prices from competing retailers through mobile device	Use QR codes or automated tags to learn about products and promotions
Australia	2.76	2.39	2.87	2.40	2.35	3.02	2.52	2.93	2.41
Canada	2.79	2.50	2.96	2.32	2.27	3.19	2.47	2.81	2.44
Finland	2.67	2.32	2.78	2.25	2.25	3.03	2.46	2.93	2.19
France	2.79	2.40	2.81	2.64	2.58	3.05	2.66	2.95	2.60
Germany	2.94	2.32	2.81	3.02	2.71	3.18	2.82	3.24	2.64
Italy	3.47	3.28	3.73	3.24	3.17	3.65	3.46	3.89	3.34
Japan	2.91	2.73	3.10	2.75	2.76	3.02	3.01	3.28	3.00
Netherlands	2.76	2.32	2.85	2.42	2.31	2.90	2.52	3.07	2.32
Portugal	3.49	3.33	3.75	3.52	3.45	3.80	3.43	3.78	3.37
Spain	3.38	3.16	3.60	3.19	3.15	3.62	3.23	3.66	3.30
Sweden	2.75	2.28	2.78	2.25	2.21	3.02	2.43	2.93	2.39
UK	2.58	2.22	2.66	2.32	2.26	2.95	2.36	2.72	2.28
USA	2.74	2.50	2.83	2.49	2.45	3.17	2.60	2.82	2.55
Brazil	3.82	3.30	4.06	3.58	3.45	3.91	3.83	4.13	3.71
China	3.76	3.78	3.95	3.91	3.88	4.02	3.97	4.09	3.82
India	4.02	3.90	4.21	4.05	3.97	4.18	4.09	4.32	3.94
Mexico	3.95	3.75	4.12	3.79	3.73	4.00	3.94	4.25	3.86
Russia	3.46	3.37	3.64	3.20	3.18	3.56	3.42	3.87	3.39
Total	3.17	2.88	3.30	2.96	2.89	3.40	3.07	3.42	2.97

Based on a scale of 1 to 5 where 1 = not at all important, and 5 = extremely important

Mean score = <2.0 = ⬤   2.0-3.0 = ⬤   >4= ⬤

Key Research Findings

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46% in India say Personalized communication is very important

More broadly, other significant differences are emerging between the high-growth (or maturing markets) and the mature markets.

In high-growth markets, digital shoppers are more likely to:

- Embrace the digital revolution, leading the way in the use of mobile apps and social media in online shopping activity (particularly in India)

- Look for rewards and to recommend that retailer if they receive one

- Provide retailers with their personal information to enhance and speed up the shopping process

- Predict physical shops to turn into showrooms for selecting and ordering

- Expect deliveries to be made separately at their convenience

- Regard the bar code as very important to search for information, choose and compare products (particularly in India and Mexico).

By contrast, mature market digital shoppers are:

- Less likely to be high-frequency, socially-active digital shoppers

- Confident online shoppers, but security and privacy doubts have not receded, with techno-shy shoppers still very evident, especially in the European markets

- Using the Internet as a well-established technology throughout the shopping process, while their usage of other digital technologies and social media is less prevalent

- Expecting clear price information, a number of payment options, digital receipts, delivery tracking, and product return flexibility.

In the high-growth market, these findings indicate that there is a significant opportunity for brands present in, or expanding into, these regions to use the digital channels that are obviously resonating with consumers in these countries.

There is currently a willingness by consumers to openly engage with retailers and brands and the industry should ensure that it does not squander this dynamic momentum.

However, in the mature markets, companies need to be aware of the greater resistance and be more transparent and intelligent than ever about how they engage with customers, to ensure the trust and engagement of mature markets shoppers.

Key Research Findings

No 'One' Digital Shopper

As in 2012, our conclusion is that there is no 'one' digital shopper. Moreover, with the proliferation of digital channels and a proactive stance to engaging with customers taken by retailers and CP manufacturers, the task of profiling our respondents has become more layered and complex. Key factors influencing the experience and requirements of digital shoppers include age, gender, product category, journey phase, attitudes and expectations towards technology, and market maturity.

Our advanced analysis across all dimensions showed that taking a global approach was producing skewed results. So we developed our profiles based on the two market groups - mature markets and high-growth markets, arriving at seven distinct categories of shoppers, who use digital channels in different ways during their shopping journey.

As customer profiling has become more multifaceted, it is very challenging for retailers and CP companies to develop the most appropriate strategy to engage their customers online. While most companies have already embarked on a 'digital journey' in some shape or form, many are uncertain about whether they are truly addressing the changing needs of their consumers, with the right priorities or the right initiatives.
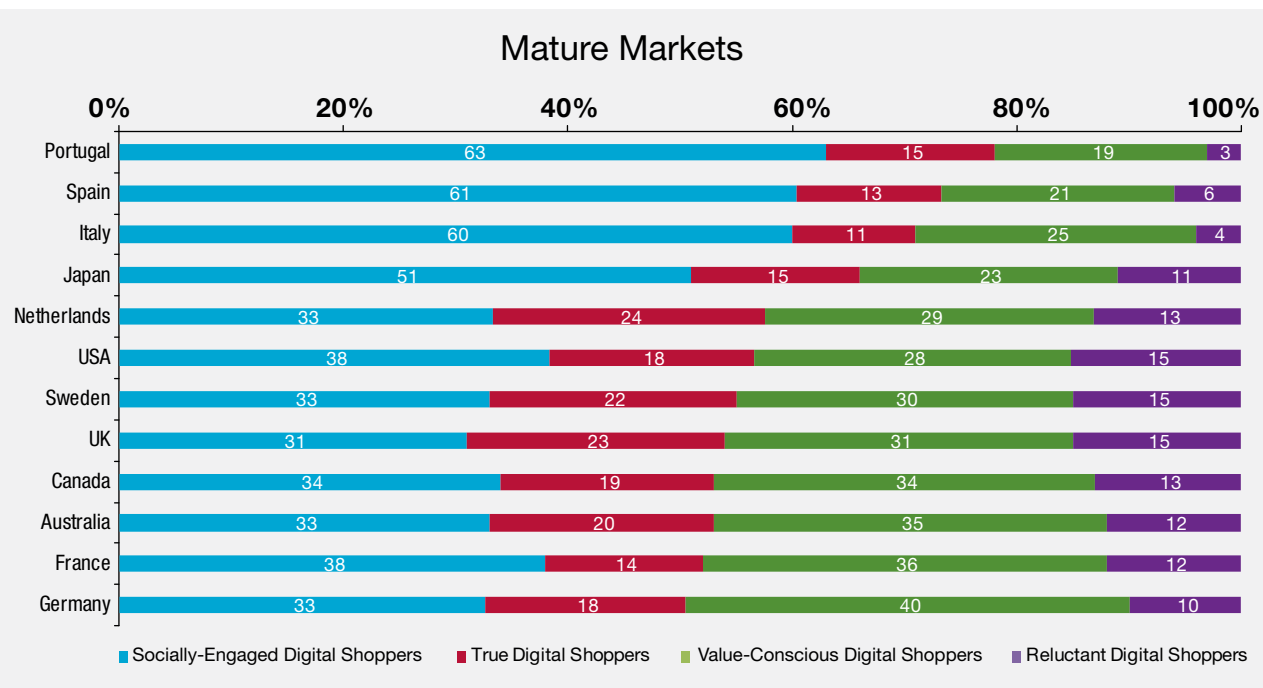
Analysis and the resulting insights can provide companies with a better understanding of shopper behavior and preferences. This is the building block for developing and delivering a more tailored all-channel experience, appropriate to the customer profile.

Key Research Findings

Figure 6: Digital Shopper profiles in Mature Markets ranked according to their level of being digitally-savvy, by country

Mature Markets

Country	Socially-Engaged	True Digital	Value-Conscious	Reluctant
Portugal	63	15	19	3
Spain	61	13	21	6
Italy	60	11	25	4
Japan	51	15	23	11
Netherlands	33	24	29	13
USA	38	18	28	15
Sweden	33	22	30	15
UK	31	23	31	15
Canada	34	19	34	13
Australia	33	20	35	12
France	38	14	36	12
Germany	33	18	40	10

■ Socially-Engaged Digital Shoppers ■ True Digital Shoppers ■ Value-Conscious Digital Shoppers ■ Reluctant Digital Shoppers

Digital Shopper profiles in the Mature Markets (which included Australia, Canada, Finland, France, Germany, Italy, Japan, Netherlands, Portugal, Spain, Sweden, the United Kingdom and the United States); see Figure 6.
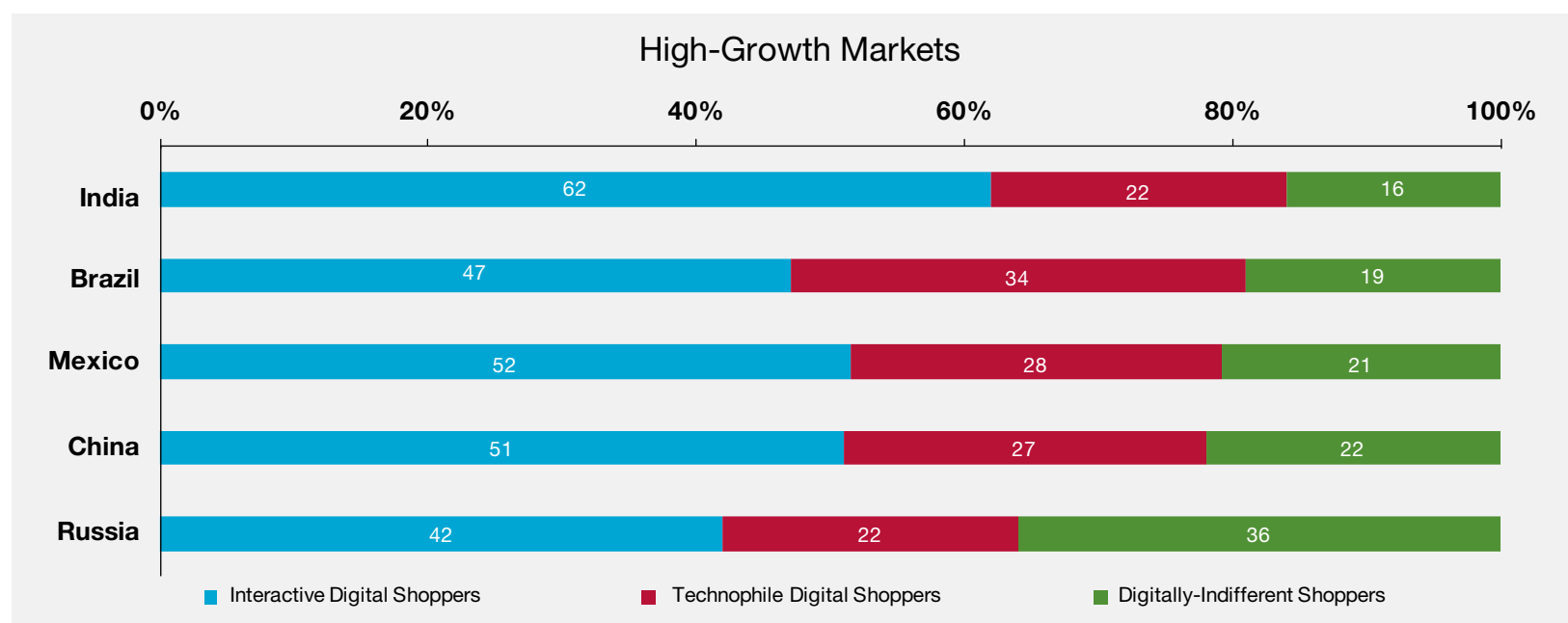
- **Reluctant Digital Shoppers** (11% of the total mature market sample): This group is not comfortable using technology and typically shies away from it. They prefer purchasing from physical stores versus online and avoid social media and smartphone as shopping channels.

- **Value-Conscious Digital Shoppers** (29%): This group prefers in-store shopping, but is comfortable using the Internet and email as part of the purchasing journey. They are less comfortable using smartphones, tablets and social media.

- **Socially-Engaged Digital Shoppers** (41%): Heavy users of digital technologies and comfortable using social media. The group is relaxed entrusting its data to retailers and using all channels to research products.

- **True Digital Shoppers** (19%): This group purchases online the most frequently of any other in the mature market segment. True Digital Shoppers use apps to compare products, track delivery and are happy sacrificing personal data for customized deals.

Key Research Findings

Figure 7: Digital Shopper profiles in High-growth Markets ranked according to their level of being digitally-savvy, by country

High-Growth Markets

Country	Interactive Digital Shoppers	Technophile Digital Shoppers	Digitally-Indifferent Shoppers
India	62	22	16
Brazil	47	34	19
Mexico	52	28	21
China	51	27	22
Russia	42	22	36

Digital Shopper profiles in the High-growth Markets (which included Brazil, China, India, Mexico and Russia); see Figure 7.

- **Digitally-Indifferent Shoppers** (23% of the total high-growth market sample): This group is uninterested in digital technologies like smartphone and mobile apps, and prefers stores. They are comfortable sharing personal information with retailers, but not through social media channels.

- **Interactive Digital Shoppers** (50%): Interactive Shoppers are at ease shopping across all digital technologies, are regular online shoppers, and love retailers that embrace technology like QR codes and mobile apps.

- **Technophile Digital Shoppers** (27%): This group has willingly adopted digital technology and makes online purchases regularly. Although they trust retailers with their personal information, they like the opportunity to opt in and out of notifications.

Key Research Findings

The Privacy Issue

As shopping has changed, so the digital trail of personal data has grown. We are now seeing the emergence of what are known as 'data lakes', aggregations of Big Data from the trillions of transactions and communications at every level of society, together with the power of analytics tools to aggregate, analyze and predict user behavior.

This, together with publicized 'digital landmine accidents' or data breaches, the pace of technology development, and the 'Snowden effect', have generally led consumers to become much more aware of the ownership and value of their data and issues of data privacy. We are witnessing a shift in the power balance between retailers and CP companies, and the consumer.

Our study focused a number of questions on this aspect of digital shopping, and it is clear that there is a significant distrust over the use of personal data, particularly in mature markets. Globally, over 28% of respondents feel strongly that they currently are not being provided with clear notice, choice and control of how their personal data is collected, used and shared by retailers, and 6% do not even know (Figure 8).

The ability to opt in and out from messages and targeted offers is something consumers strongly agree with across all markets. Over 50% would like the flexibility to opt in and out of receiving offers from retailers, across all markets, particularly in Russia (4.29 score) compared to Japan with the lowest score (3.13)

Moreover, personal expectations regarding retailers' personal data usage are low: one in four consumers do not expect their favorite retailers to know their history to provide better service, particularly in Canada, Finland, Netherlands and Sweden.

Other findings relating to privacy include:

- 46% of respondents do not mind being observed in store, particularly in Mexico and India; consumers in the Netherlands and Finland are not so comfortable with this
- While 50% do trust their favorite retailers to use their personal data responsibly (particularly Mexico)
- 34% strongly disagree to a retailer using their social media data, particularly in the Nordic countries
- As indicated before, high-growth markets are considerably more interested in receiving offers based on their personal data, whereas many in mature markets do not
- Respondents prefer to read other people's reviews (63%) rather than provide their own personal reviews (52%).

It is clear that a combination of data privacy concerns, and apathy towards poorly-targeted advertisements in the early days of online marketing, has turned consumers in mature markets away from personalized offers. For retailers and CP companies, how to address the trade-off between the commercial value of gathering detailed consumer insights and the value of the trust in maintaining consumer privacy is complex. Companies need to understand the shifting attitudes of consumers and be prepared to act individually or collectively.

Creating mutual value is certainly key to improved digital engagement and in establishing and retaining trust. Initiatives such as that of the development of

Key Research Findings

the Consumer Engagement Principles by the Consumer Goods Forum are looking to develop a common approach to improve the way the retail and

CP companies can bridge this 'trust gap' and ensure a balance between the values of the different stakeholders; consumer, society and business.

Figure 8: Global responses to questions relating to the use by retailers and CP companies of personal data

	Mean 2014	Mean 2012
I would like to be able to opt in and opt out from messages and offers form retailers — 4 4 4 20 28 40	4.01	N/A
I trust my favorite retailers to use my personal data responsibility and for my benefit. — 4 10 11 25 27 23	3.46	N/A
I am clear about the privacy policies of the retailers I interact with — 5 9 14 28 25 18	3.31	N/A
I do not mind if my behavior in store is observed — 3 16 12 25 26 20	3.22	N/A
Currently I am provided with clear notice. Choice and control of how many personal data is collected. Used and shared by retailers — 6 13 15 28 23 15	3.13	N/A
I do not mind when a retailer uses my social media data — 4 34 14 19 17 12	2.56	N/A

Legend: Don't know | 1 Strongly disagree | Strongly agree

Key Research Findings

Fashion showing the way

Looking now from a product category perspective, across all countries, the frequency of online purchasing has remained largely unchanged from 2012 to 2014, with only a 1-2% growth in most categories. This is as might be expected, as many mature markets continue their protracted climb out of recession and into low-level growth and even the high-growth markets have slowed.

The significant exception to this is the fashion category, which shows an increase of 9 percentage points of consumers having purchased a product online in the last 6 months, up to 61% in 2014 from 52% in 2012. More than half purchased electronics, 44% bought health products, and 3 in 10 food online; see Figure 9.

Figure 9: Online purchasing behavior by categories, measured over the last six months

Category	% of consumers purchasing products online in the last 6 months	
Year	**2014**	**2012**
Electronics	56%	54%
Fashion	61%	52%
Health	44%	42%
Food	30%	29%
DIY	22%	21%
None of these	10%	15%

Key Research Findings

Social Media: overhyped? | Physical store reigns | Digitally-savvy high-growth markets | No 'One' Digital Shopper | The Privacy Issue | **Fashion showing the way**

A second key finding is that Internet sites are of increasing relevance across the whole shopper journey for all categories. They are most important as a source of information at the awareness and choice stages across all markets, but particularly high-growth markets, and for high-value products, particularly electronics, across all markets; see Figure 10.

Figure 10: The importance of Internet sites, by category

Trend	Awareness		Choice		Transaction		Delivery		Post Sales	
	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014
Food	3.59	3.70	3.62	3.64	3.43	3.43	3.62	3.62	3.70	3.67
Health	3.91	3.98	3.87	3.90	3.78	3.78	3.92	3.91	3.93	3.91
Fashion	3.99	4.11	3.95	4.03	3.88	3.94	3.99	4.05	3.98	3.95
DIY	4.04	4.11	4.02	4.05	3.90	3.91	4.00	4.01	4.02	3.98
Electronics	4.18	4.26	4.16	4.19	4.04	4.00	4.12	4.11	4.11	4.04
Total	**3.94**	**4.03**	**3.92**	**3.96**	**3.80**	**3.81**	**3.92**	**3.94**	**3.94**	**3.91**

Based on a scale of 1 to 5 where 1 = not at all important, and 5 = extremely important

Mean Source: <2.0 = ● 2.0-3.0= ● >4= ●

Key Research Findings

Fashion: Certainly the category with a high degree of online momentum with its 9 percentage points growth, this begs the question why this sector is so far ahead of the rest. Part of the answer lies, we believe, in a high degree of segmentation and carefully tailored offers for certain previously 'hard to reach' segments, in addition to the core markets of females buyers of 15-25 years. In the majority of countries, consumers are most interested in receiving personalized offers and recommendations for fashion purchases, particularly in India and Mexico;

Apparel companies have taken a very proactive approach and made significant investment and progress in engaging with the consumer across as many digital channels as possible, turning the home into a 'fitting room'. The most important element of post-sales is the option to return goods easily (71% indicated this was important or extremely important), whether or not this option is taken up, and online retailers have made strides in making this option an integral part of the purchase 'promise';

Electronics: There is a clear trend towards researching and choosing high-value products such as electronics and DIY via digital channels, and electronics buyers are particularly keen on using the Internet in general, no doubt because of ease of choice, (including the ability to source product details and make price comparisons) and ease of delivery (such as tracking progress);

DIY products: the home handyman is the least likely to have purchased online, with just under a quarter purchasing this way in the last six months – the smallest retail category. This percentage is similar to 2012, and is due most likely to the relative infrequency purchase of high-value, engineered DIY products, compared with FMCG goods such as food, health, and to some extent fashion. Not surprisingly of the 22% of digital shoppers who had bought DIY online, the majority were men;

Food: The 'traditional' in-store experience remains the most important channel for the food category compared to digital channels, particularly in the awareness, choice and transaction stages. Social media and smartphone apps, in contrast, are of relatively low importance, compared to other categories;

Health and Personal Care: These shoppers are likely to turn to social media and smartphones to search for product information and promotions. They are also very likely to buy other categories such as food and fashion online, making them a good candidate for cross-selling.

Retailers and CP companies can certainly learn from studying the way other categories maximize the opportunities provided by channels and even to cross-sell. By providing a richer experience online, with multiple options, buyer advice and reviews, integrated video, fashion is showing how it can be done, but not just up to the point of sale, but also in the post sales stages, with returns flexibility and payment options.

There is certainly room for more creative thinking to be applied in the delivery and post sales phases, including review, feedback and delivery alternatives.
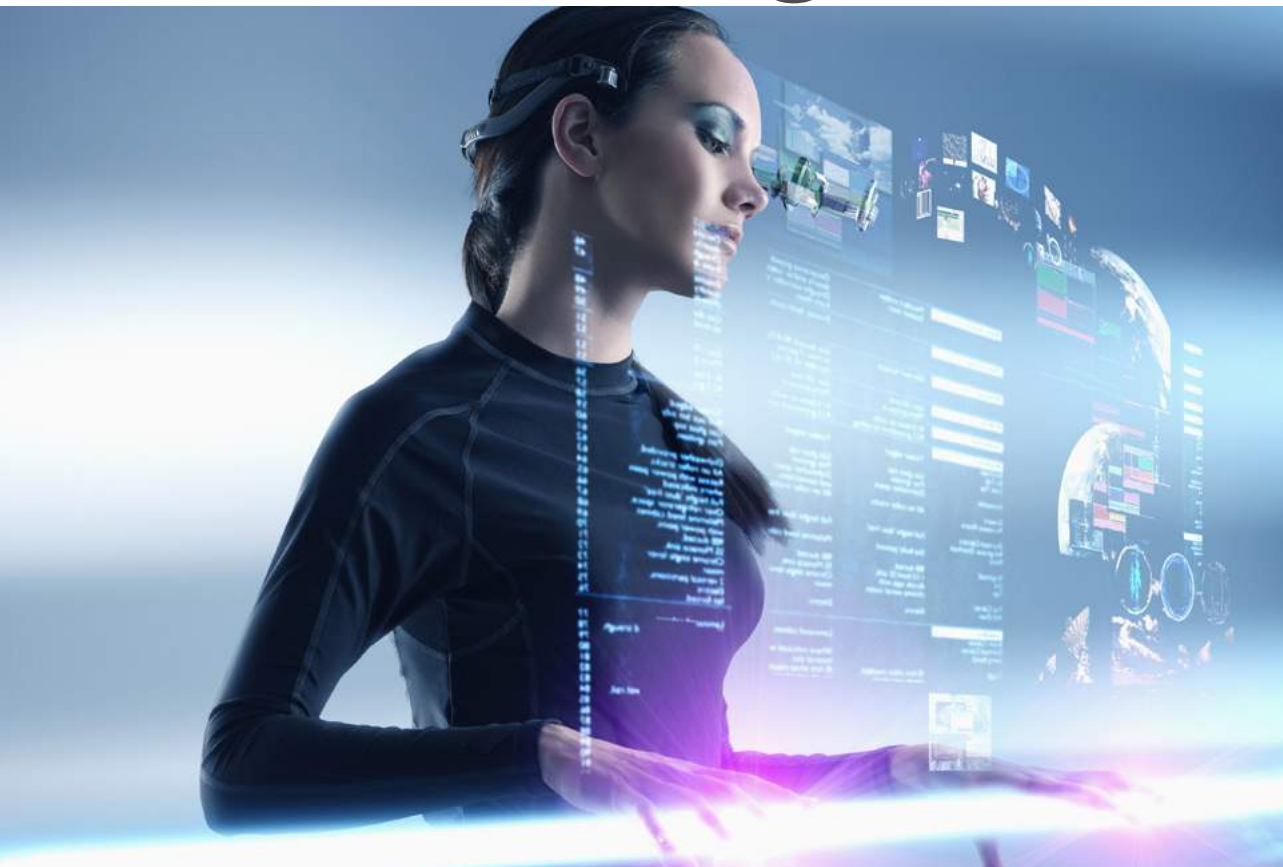
Looking Ahead

» The Future Use of Digital Channels

» The way we see it

» From Shopper Relevance to Digital Differentiation

The Future Use of Digital Channels | The way we see it | From Shopper Relevance to Digital Differentiation

Looking Ahead

The Future Use of Digital Channels

In addition, respondents were asked for their predictions about how the role of various digital shopping channels was likely to change their shopping process over the next three years and to identify developments they would like to see to improve their shopping experience across channels.

Key findings for future online shopping behavior, (see Figure 11) include:

Bypass the middle man: As in 2012, consumers expect the option to order online directly from brand manufacturers to continue to increase; 65% expect this to increase online, while 53% expect an increase ordering direct via a retailer's mobile app or 3rd party app (50%), and to drive improved convenience in their end-to-end shopping experience. This is particularly notable in high-growth markets, (particularly in India and Mexico), and Mediterranean Europe, but not in technology-driven countries such as Japan;

Store at the core: However, the physical store remains important for consumers particularly in mature markets. Two in five disagreed that the physical store was less important, particularly in emerging markets, and half agreed they spend more online if they can see the product in store (although not in France and Germany);

The Future Use of Digital Channels | The way we see it | From Shopper Relevance to Digital Differentiation

Figure 11: How the role of Digital Channels will change over the next three years, by country

	Social media	Mobile apps from retailers	Mobile apps from third parties	Mobile apps from brand manufactures	In-store digital devices	Online retail stores	Online ordering from brand manuf
Australia	35%	39%	38%	40%	46%	61%	60%
Canada	37%	37%	37%	38%	44%	58%	56%
Finland	31%	33%	38%	33%	35%	57%	59%
France	33%	40%	42%	41%	47%	67%	62%
Germany	36%	37%	37%	38%	48%	66%	61%
Italy	42%	45%	48%	47%	46%	61%	63%
Spain	47%	44%	47%	47%	51%	55%	62%
Sweden	24%	31%	30%	32%	34%	53%	53%
UK	30%	39%	37%	40%	40%	63%	57%
USA	36%	41%	36%	41%	45%	62%	61%
Brazil	69%	62%	72%	67%	74%	84%	82%
China	64%	65%	66%	67%	64%	78%	76%
India	76%	75%	77%	78%	77%	81%	81%
Mexico	71%	72%	73%	73%	75%	79%	81%
Russia	56%	56%	61%	60%	62%	78%	79%
Turkey	72%	68%	69%	71%	64%	75%	78%
Total	47%	49%	50%	51%	53%	67%	67%

Looking Ahead

The Future Use of Digital Channels | The way we see it | From Shopper Relevance to Digital Differentiation

Just browsing: Moreover, there is a move towards browsing in store and then buying online, but also a limited desire for human contact in the store. In Russia, Brazil and Mexico, more than three fifths would prefer to be offered additional product suggestions online, not in-store. However the role of social media is also predicted to decrease over the next three years;

More in the Store: Consumers are also expecting to see significant improvements in in-store technology (55%), such as interactive screens, most strongly in Brazil, India and Mexico.

In terms of pricing and value, we found the following:

What's my reward? Consumers are looking for a reward and are more likely to recommend the retailer if they receive one, especially in emerging markets;

Pay less online: There is a strong expectation of price deflation. Over 70% of respondents agree or strongly agree that they expect online prices to be lower than those in physical store and catalogs. This is consistent across all markets.

Finally shoppers were also asked to assess how future innovations would influence the shopping process:

The Internet of Things: Consumers predicted that intelligently connecting devices such as 'smart' fridges (44%) and wearable devices, such as Google Glass or the Apple Watch (42%), plus digital links such as QR codes (45%) will all grow in importance in the shopping journey, but not become dominant. However, 2 in 10 also expect to see them decrease in importance.

These findings are certainly challenging in some respect, with markets, particularly the high-growth ones, anticipating the greatest changes. There are some strong clear messages for retailers of the weakening of the relationship with the consumer, and lower revenues through the physical store as a channel.

With so many different types of digital shoppers, so many diverse channels and different cultural considerations, it's very challenging for retailers to figure out the right strategy now and even more so when trying to predict future buying behavior.

Looking Ahead

The Future Use of Digital Channels | **The way we see it** | From Shopper Relevance to Digital Differentiation

The way we see it

It is clear from these findings that digital shopper behavior is altering considerably with specific requirements and expectations. It is therefore critical that retailers and CP companies understand and anticipate the changing perspectives of their digital customers and to maximize significant opportunities, particularly in high-growth markets, and manage the threats.

Digital Shopper Relevancy

In 2012, shoppers had expectations of a seamless experience across all channels, with the integration of online, physical and mobile shopping by 2014. As our results prove, there is still some way to go to achieve this enhanced engagement.

This is more than organizing a social media campaign, developing a mobile app or providing a commerce website. It is about evaluating and addressing what really matters to a shopper and that guides their behavior. The challenge is to identify the considerations that are the most relevant to target customers.

The Digital Shopper Relevancy model, developed and used successfully by Capgemini for over 12 years, categorizes all possible consumer considerations into five attributes, Access, Experience, Price, Product and Service.
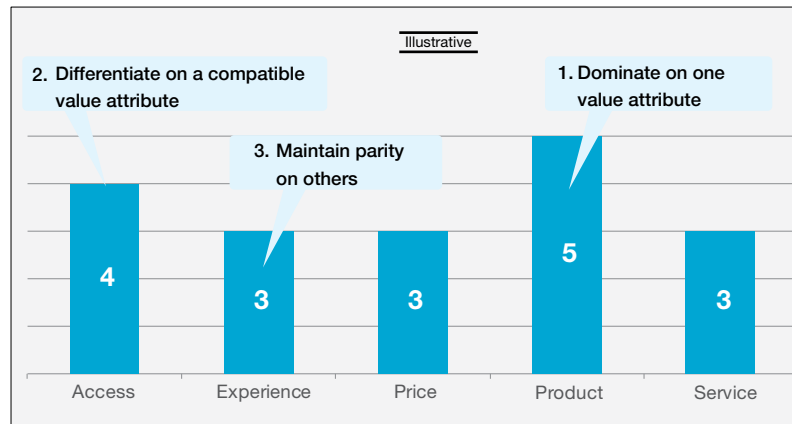
We advise clients to analyze their digital and physical presence against the consumer criteria in each of the five different attributes to understand relevancy strengths and weaknesses, opportunities and threats. Mapping their current performance and desired positioning with consumer expectations provides useful insights.

We recognize that it is practically impossible for companies to excel on all criteria and considerations – we call this 'the myth of excellence'. Therefore, we advise retailers and consumer goods companies to make clear choices:

- Which attribute do I want to dominate? "My consumers think of no other company but mine for these considerations"

- Where do I want to differentiate? "For these considerations, I'm clearly much better than the pack"

- Where will I be at par with the pack? But remember: you can never be below par!

Looking Ahead

The Future Use of Digital Channels | **The way we see it** | From Shopper Relevance to Digital Differentiation

Figure 12: Capgemini's Relevancy Model: dominate, differentiate and compete at parity

To visualize this, we apply a scoring of 1 to 5 for each attribute in our Digital Shopper Relevancy model; 5 = dominate, 4 = differentiate, 3 = at par, 2 and 1 = below par. The secret to success is to score 5, 4, 3, 3 and 3, in other words, dominate on one attribute, differentiate on another, and compete on par for the rest, as illustrated in Figure 12.

The choices and priorities any two retailers make could be very different and result in different strategies as illustrated in two examples. One retailer may want to excel in its performance, and could decide to dominate on Product (by offering the best range and quality), to differentiate on Access (by making it as easy and convenient as possible for the consumer to interact), and to be at par for the rest.

Alternatively, another retailer might be most successful by dominating on Experience (the customers love the inspiration of the retailer, and believe it

elevates their social status), differentiating on Service (by taking a strongly personalized approach) and be at par for the rest.

Both approaches are equally valid and specific to the retailer's overall strategy.

Recommendations

Although the all-channel environment brings challenges, it also offers compelling opportunities. We suggest a number of actions to achieve a step change in shopper-relevance:

- Change from a product- or feature-focused approach, to a consumer- and shopper-focused approach across all channels;

- Global companies need to take note of the differences between high-growth and mature markets, and retailers in general needs to reassess the countries where they are present and exercise caution in any market entry strategy;

- Establish processes for integrated merchandising, order fulfillment and inventory management across all channels rather than individual channel;

- Incrementally and iteratively grow via a 'test & learn' approach to customer-centric initiatives;

- Build organizational structures and goals around value propositions that cut across all channels, with incentive and commission programs to promote cross-channel selling;

- Develop and implement cross-channel benchmarks and metrics.

Looking Ahead

The Future Use of Digital Channels | The way we see it | **From Shopper Relevance to Digital Differentiation**

From Shopper Relevance to Digital Differentiation

Most retail and consumer goods companies are looking for ways to anticipate these consumer behavior changes. Most companies have started their 'digital journey' already in some shape or form, some better and more advanced than others. But many executives are uncertain whether they are addressing the changing needs of their consumers, and making the right decisions.

Our *Digital Shopper Relevancy Report 2014* insights can help retailers and CP companies to better understand digital shopper behaviors as the basis to define and deliver the most relevant and differentiating proposition for their consumers.

Capgemini has developed a number of ways to help retailers and manufacturers to get two steps ahead in their engagement with customers at each stage of the purchasing journey.

Capgemini's Digital Shopper Relevancy Scan

Designed to develop client-specific recommendations to improve customer relevance and differentiation, we combine a client's customer experience data and strategy, with our Digital Shopper Relevancy Report 2014 benchmark data and insights.

We look not only at the cross-channel shopping behaviors and needs, but also how the proposition and positioning of our client is differentiated from its competitors, by measuring the 'outside-in' view of the all-channel performance against international benchmarks. We also assess the organization's structure all-channel competencies, and processes, as well as technologies that drive a successful retail performance.

Carried out in a 3-week project of analysis and workshops, this results in a competitive view of a client's relevance to its target customers, and a clear set of concrete recommendations. This helps clients to validate or reshape their digital customer-centric strategy, accelerate the right initiatives, enter new markets or channels, create new business models, or develop new capabilities (people, process, technology, such as new digital platforms).

Managing an All-Channel Experience

We use our All-Channel Experience Framework to help clients design and deploy specific solutions to manage their customer engagement and interactions across these multiple channels. Driven by an all-channel strategy, at the core is the development of a set of specific capabilities for managing customer relationships, content, commerce and fulfillment across all channels used to engage with consumers. The framework will also help accelerate the best initiatives, identify new markets, channels or business models and to develop new capabilities.

More data for your region or category?

We can only provide a small proportion of the wealth of data we have gathered in this summary report. If you would like to see the research results for a specific data sub-set, such as for a product category, or region, please contact your Capgemini account manager, who will be able to arrange for a specific data set to be produced for you.

About our
Research

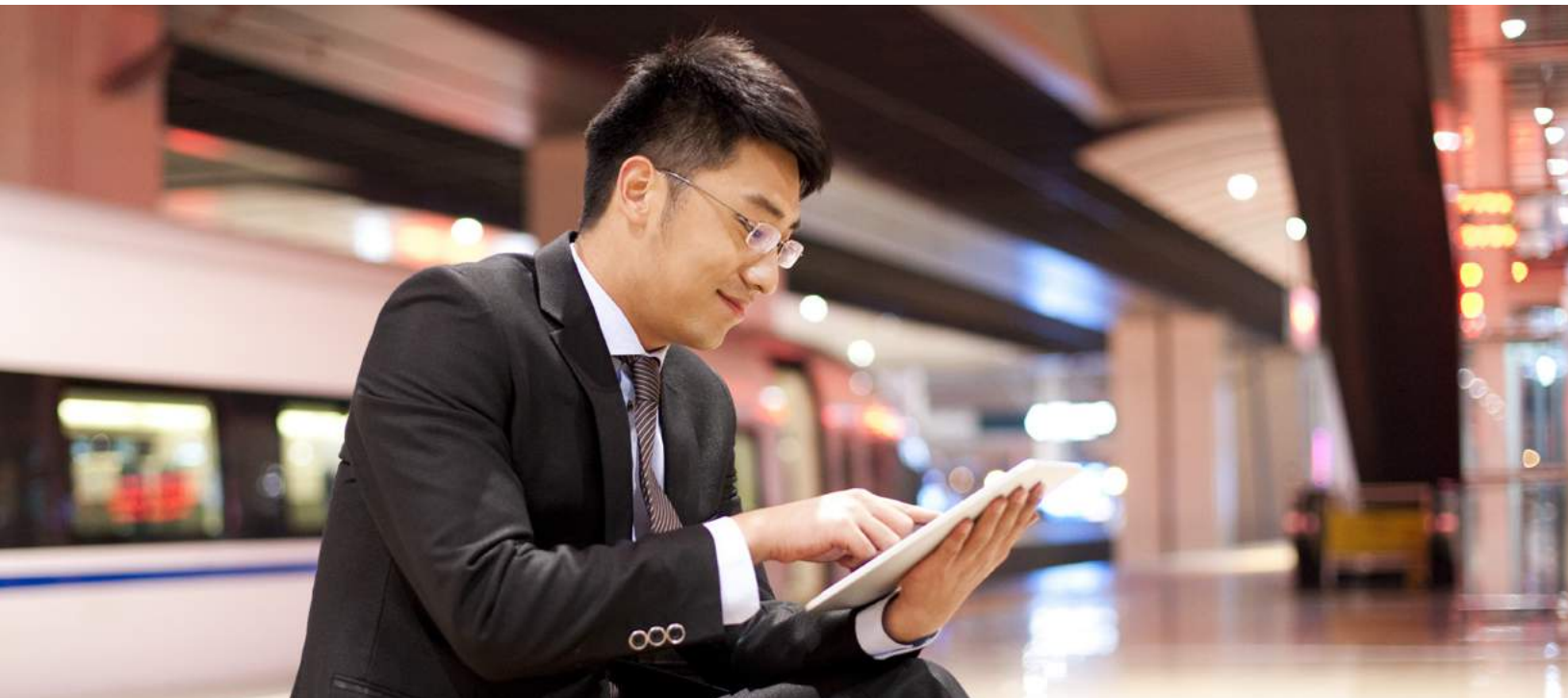» Research Methodology

» Thanks and Credits

» Who to contact

About our Research

Research Methodology | Thanks and Credits

About our Research

Capgemini has been carrying out bespoke research, tracking consumer shopping since 2002, gathering insights into the changing patterns of purchasing behavior from predominantly a traditional physical store-based experience to the multi-channel shopping we see today.

We have now surveyed over 50,000 consumers worldwide as part of our 'Consumer Relevancy' and 'Future Consumer' research programs and our Digital Shopper Relevancy research and methodology has helped many retailers and CP clients to understand better their consumers and adjust, for example, their channel or communication strategies accordingly.

We believe our Digital Shopper Relevancy research is unmatched in its scope and scale.

About our Research

Research Methodology | Thanks and Credits

Survey Sample and Methodology

Countries: 18 countries representing mature and high-growth markets, including Australia, Brazil, Canada, China, Finland, France, Germany, India, Italy, Japan, Mexico, Netherlands, Portugal, Russia, Spain, Sweden, UK, and USA;

Sample: Our online sample panel was made up of 18,000 consumers - 1,000 from each of 18 countries - aged 18+. The composition of the consumer sample in each country was based on projectable national samples representative of the population from the standpoint of age and gender. Additional demographic factors examined included income, education, employment and marital status;

Selection Criteria: All respondents had used digital channels and/or devices at least once or more during the shopping process in the three months prior to taking the survey, and they were asked about their degree of online shopping, use of mobile apps and technology adoption rate;

Questionnaire design: The survey questionnaire was devised by Digital Customer Experience experts in Consumer Products and Retail at Capgemini, in consultation with ORC International, an independent London-based global research firm;

Survey execution: The fieldwork, comprising a 15-minute online survey of 26 multi-choice questions, providing data points for 135 variables of the dataset, was carried out during the period 12th May – 23rd June 2014 and was programmed and hosted by ORC International. The survey was anonymous and presented in the respondents' native tongue. The study's quantitative data was supported by additional qualitative comments from the respondents;

Product categories: We focused our study on five product categories: food, health and personal care, fashion (clothing, footwear, and accessories), do-it-yourself home improvement (DIY) and electronics to provide a broad picture of the retail market as a whole;

Statistical Relevance: In order to ensure the production of a dependable and substantive piece of market research, the recruited sample needed to be statistically representative of the population in terms of its size and profile;

Data Protection: All research was carried out by ORC International, and conducted in compliance with the code of conduct and guidelines set out by the UK MRS, as well as the legal obligations under the UK Data Protection Act 1998.

About our Research

Research Methodology | Thanks and Credits

Thanks and Credits

In accordance with the UK's Market Research Society Code of Conduct (under which this survey was carried out), all respondents were anonymous. However, Capgemini would like to thank all of the respondents who provided their input.

We would also like to thank all of the business leaders and subject matter experts who provided valuable insight into their respective areas of expertise and market experience:

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Market Research: ORC International

ORC International is a leading global research firm with offices across the US, Europe and Asia Pacific. The company's combination of cutting-edge technology, skilled researchers and in-depth industry experience provides clients with the insight to help solve their most pressing business challenges. ORC International offers innovative customer research solutions to a range of public and private sector clients and offers solutions to the consumer and business-to-business markets. To learn more about ORC International, visit www.orcinternational.com

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About Capgemini

With almost 140,000 people in over 40 countries, Capgemini is one of the world's foremost providers of consulting, technology and outsourcing services. The Group reported 2013 global revenues of EUR 10.1 billion.

Together with its clients, Capgemini creates and delivers business and technology solutions that fit their needs and drive the results they want. A deeply multicultural organization, Capgemini has developed its own way of working, the Collaborative Business Experience™, and draws on Rightshore®, its worldwide delivery model.

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