

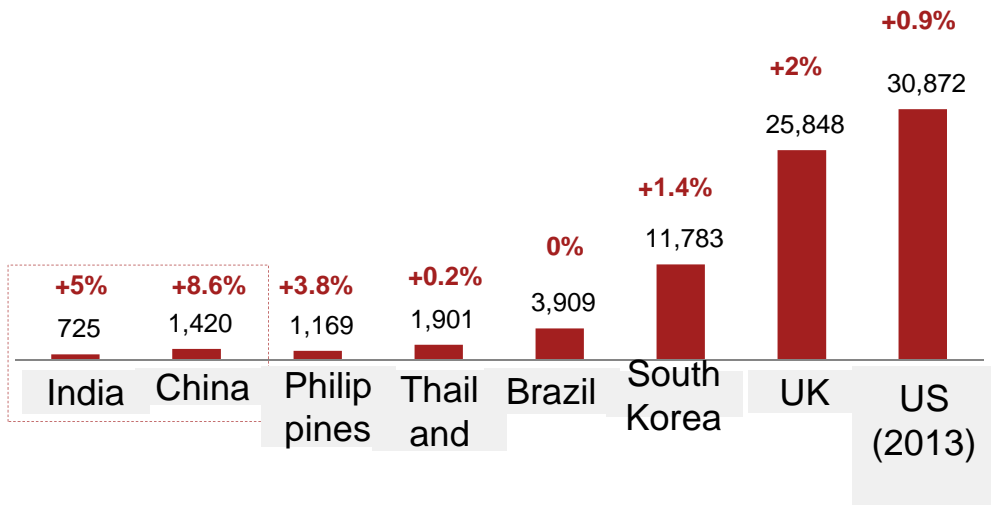
# Building retail businesses for tomorrow today

## Retail Leadership Summit 2016

*Strictly Private  
and Confidential*

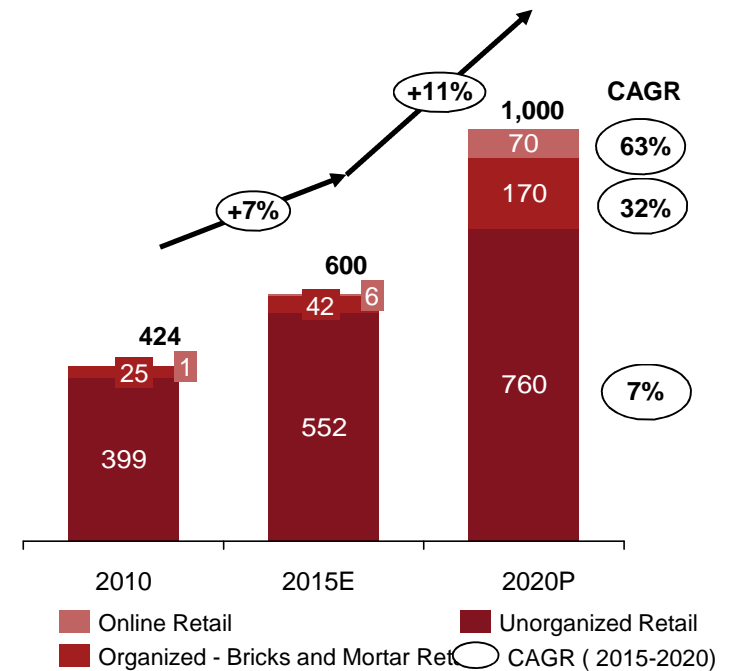
# Consumption trends are seeing a revival and India remains poised for growth in organised retail – Physical & Digital

## Household consumption per capita in 2014 (US \$ Bn)



Source: World Bank country data

## India Retail Sector Growth (US \$ Bn)

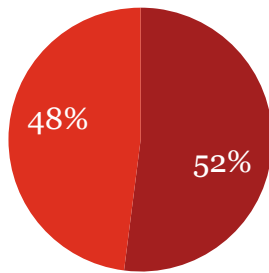


Source: PwC Strategy & analysis, CRISIL research, IBEF

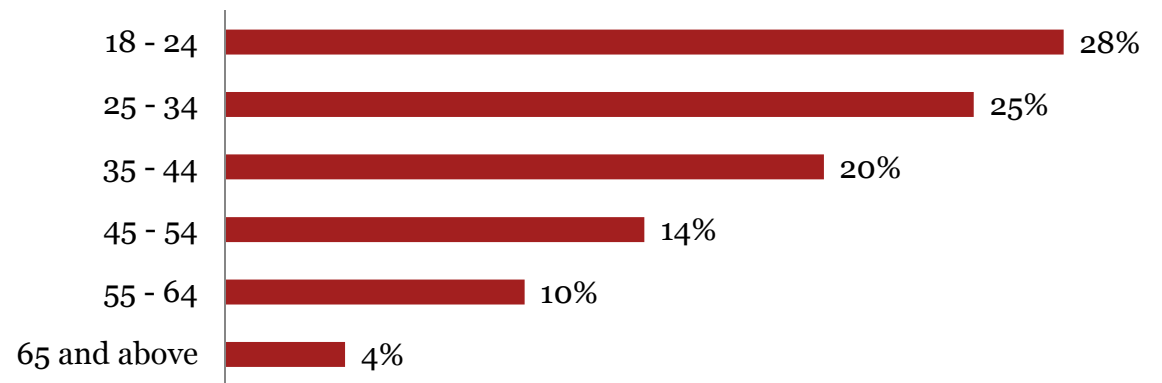
# *The Total Retail 2015 survey has covered over 23,000 respondents globally and 1,000 in India*

## Gender

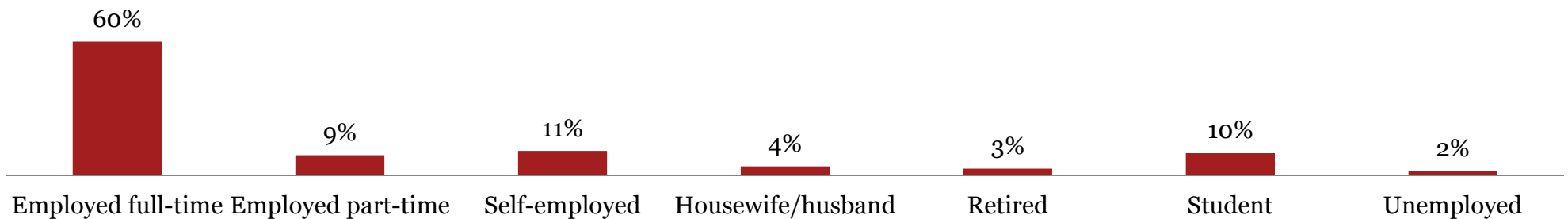
■ Male ■ Female



## Age



## Employment status



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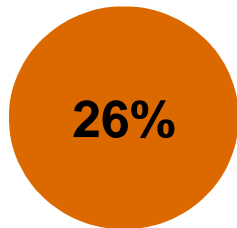
***The year has been a watershed moment for many trends that have been percolating over the past few years***

- **The Reality of Omni channel shopping gains scale**
- **Social Influence dominates engagement & grows beyond**
- **Digital Payments enabling growth realistically**
- **Deeper demands on the In store experience – Retail talent matters(finally)**
- **“Loyalty” beginning to earn its spurs**

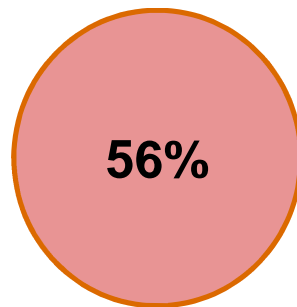
## *Growth of Omnichannel retail led by online*

### **First Ever Online Purchase (India)**

**Last Year**

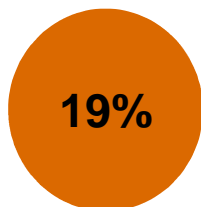


**1- 4 Years**

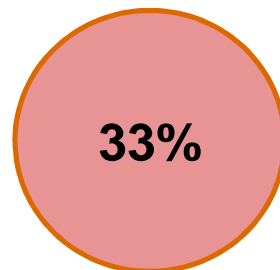


### **First Ever Online Purchase (Global)**

**Last Year**



**1- 4 Years**



### **Online Purchase over the last 12 months**

**Daily or Weekly (India)**

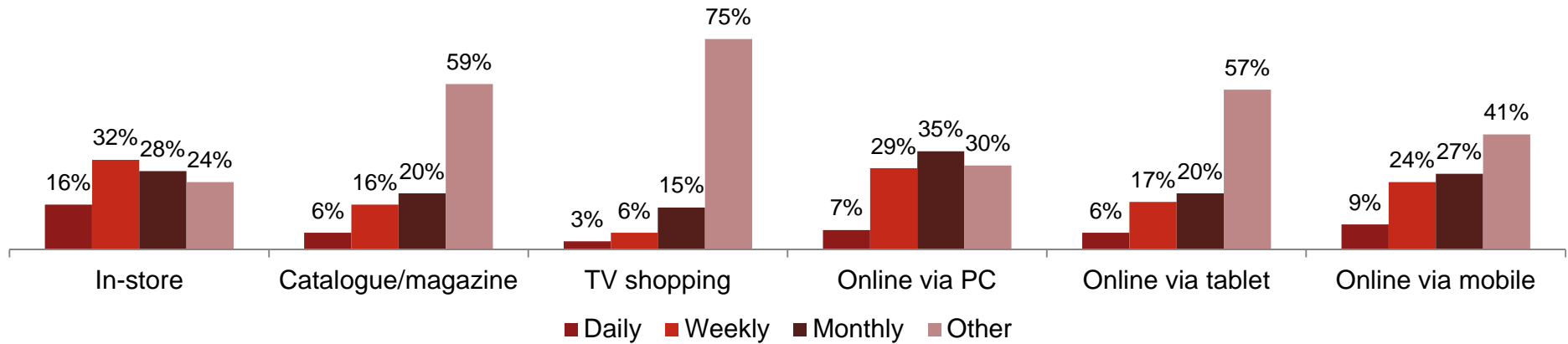


**Daily or Weekly (Global)**

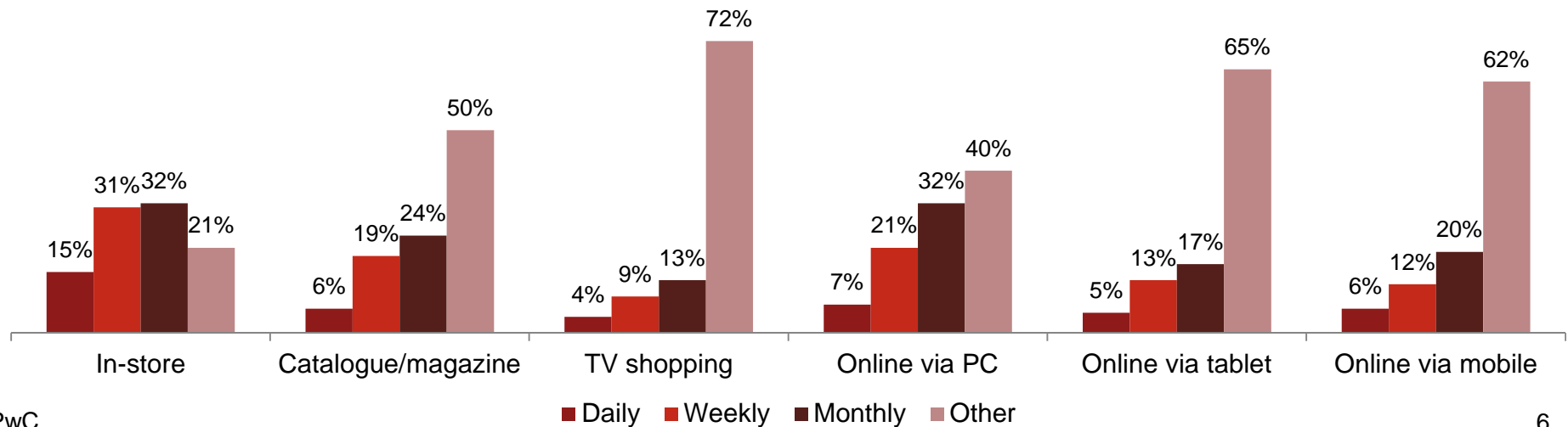


# *Omnichannel patterns have become more relevant and visible*

## India - Cross channel shopping behaviour: 2015

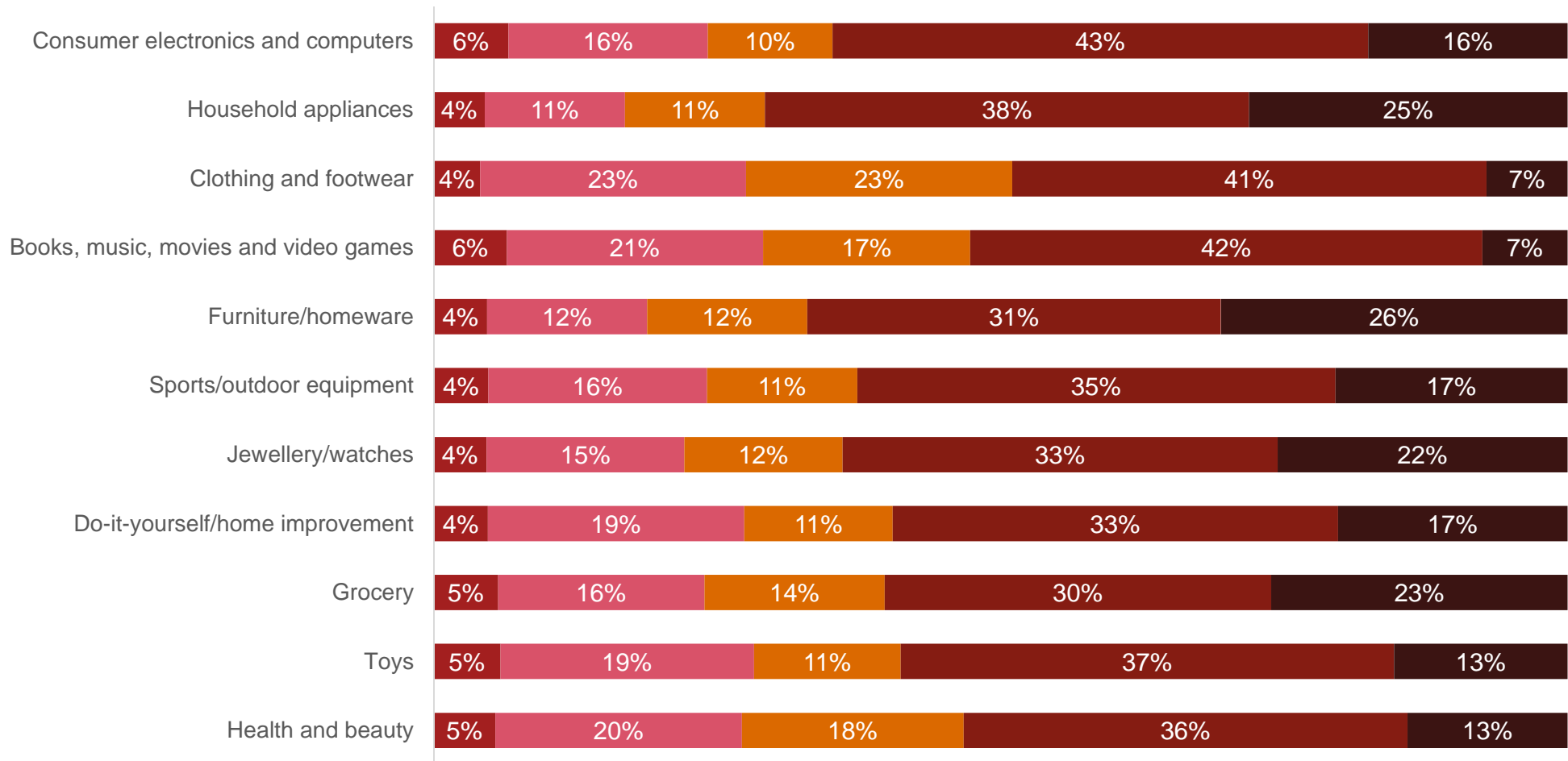


## India - Cross channel shopping behaviour: 2013



# Omnichannel behaviour is growing across retail categories

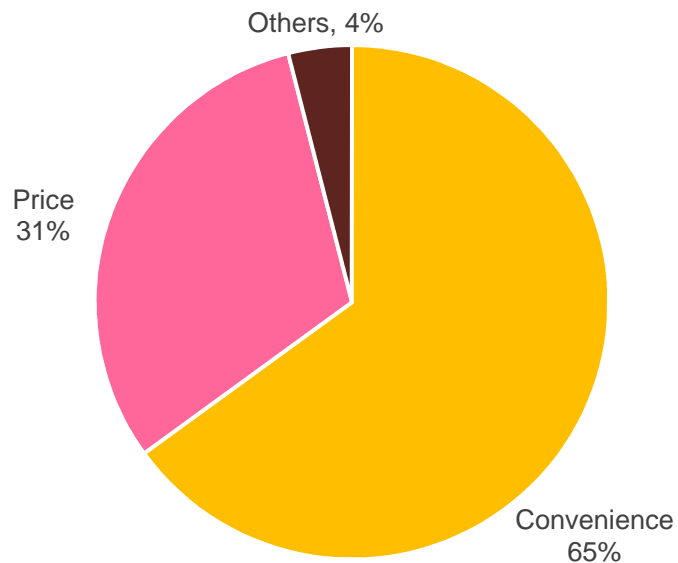
Category-wise online shopping 2015: India



■ Exclusively purchase online (100%) 
 ■ Most Purchase (61-99%) 
 ■ About half of my purchases (41-60%)  
■ Some Purchase (1-40%) 
 ■ Don't purchase this category online

## ***‘Convenience’ is the biggest factor driving of choice of channel; ‘Value’ is driving choice of retailer***

**What has been your main influencer for buying online in the last 12 months?**



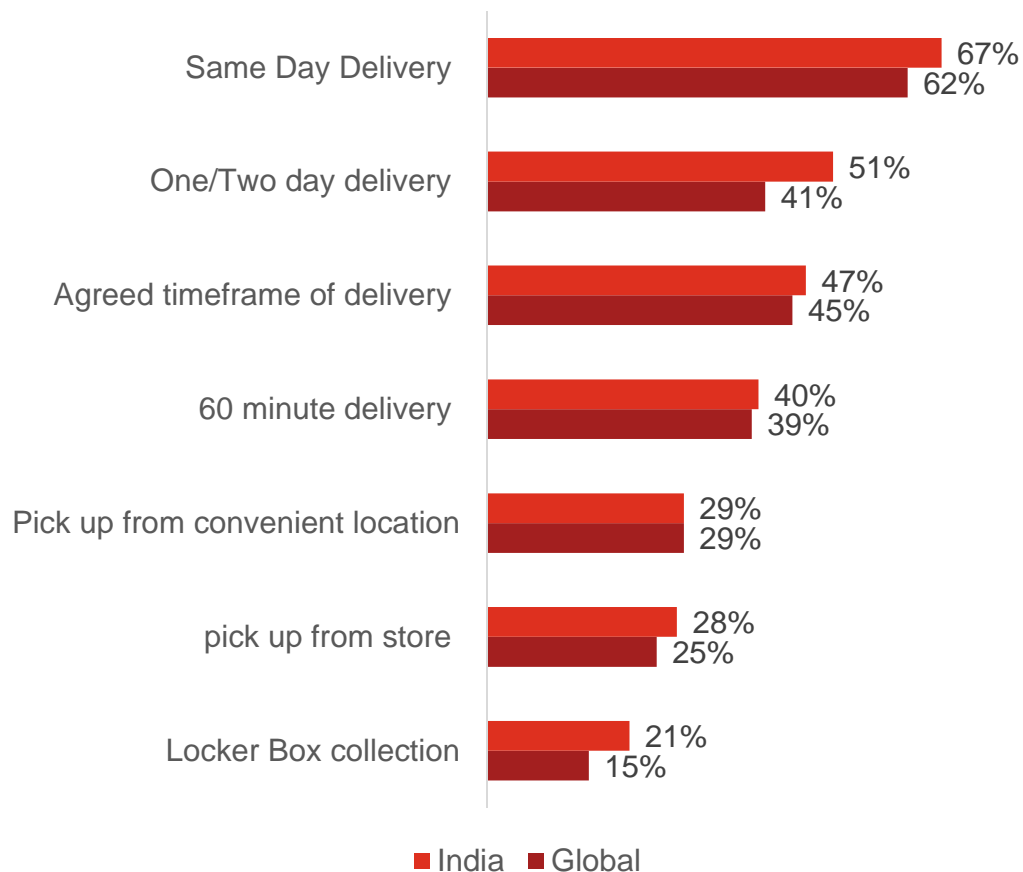
**Top factors for consumers choosing their favourite retailer: 2015**





## Consumers are opting for 'value' over price

### What Delivery options would you be willing to pay for?



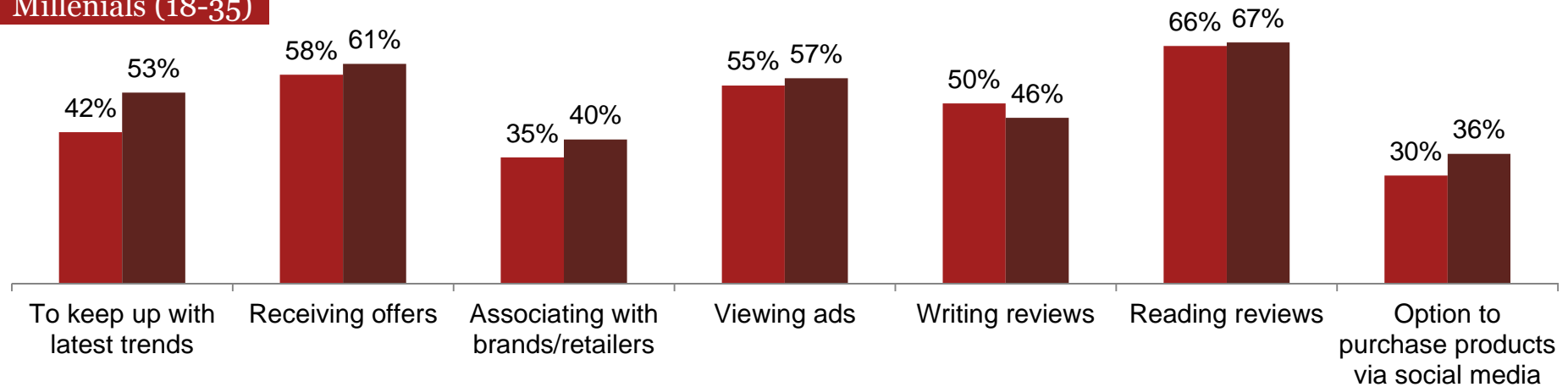
### What are the key benefits of being a member of a loyalty reward program?



# *Influence of social media continues to grow...*

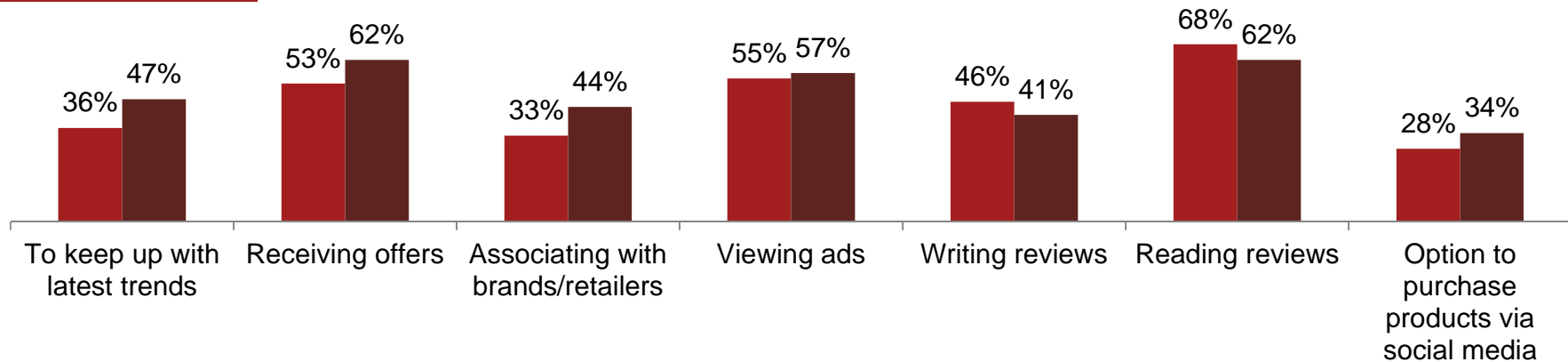
## **What are shoppers using social media for?**

### **Millenials (18-35)**



■ Men ■ Women

### **Gen X (35-55)**

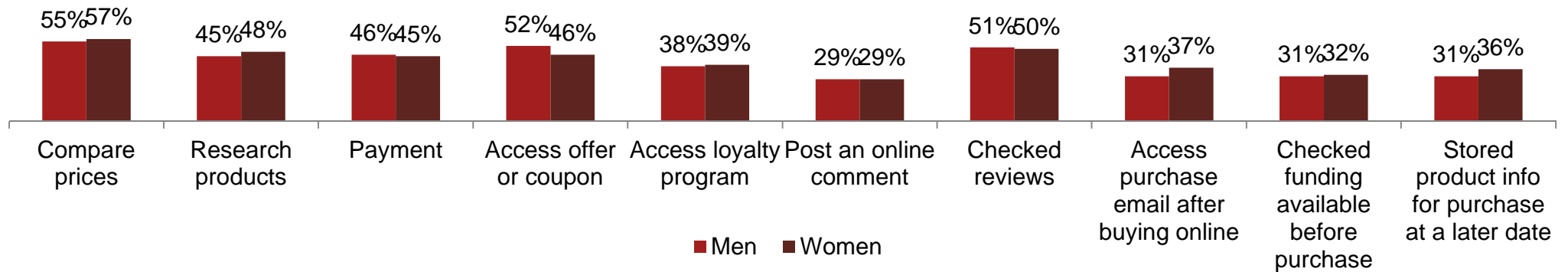


■ Men ■ Women

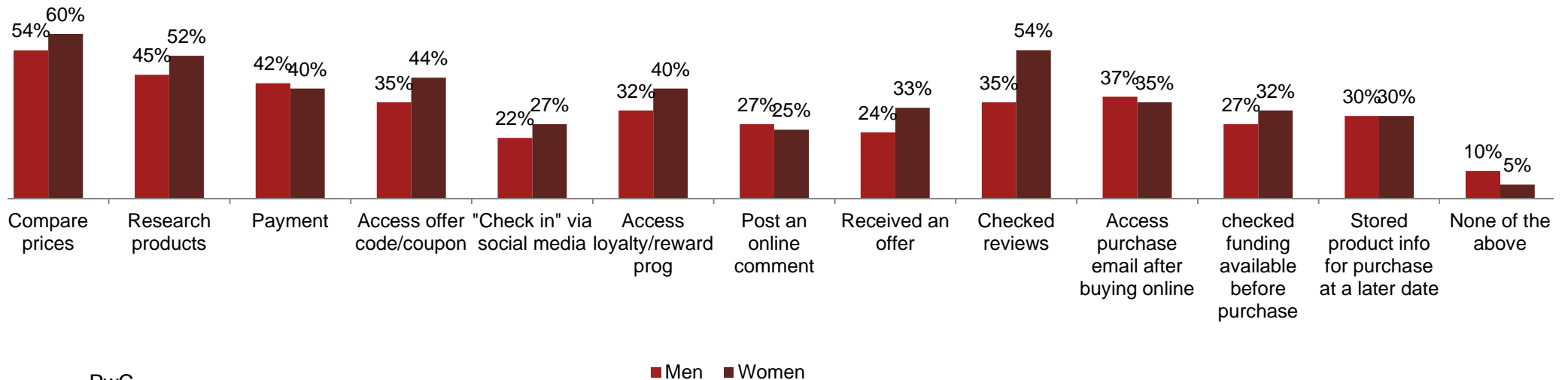
## ...So does the use of mobile/smartphone, even in-store

### How are shoppers using their mobile/smartphones whilst in-store?

#### Millennials (18-35)



#### Gen X (35-55)



# *Shoppers' expectations are changing, not just online but in-store as well*

## Which of the following would make your instore shopping experience better ?

**Factors which would improve in-store experience: Men**

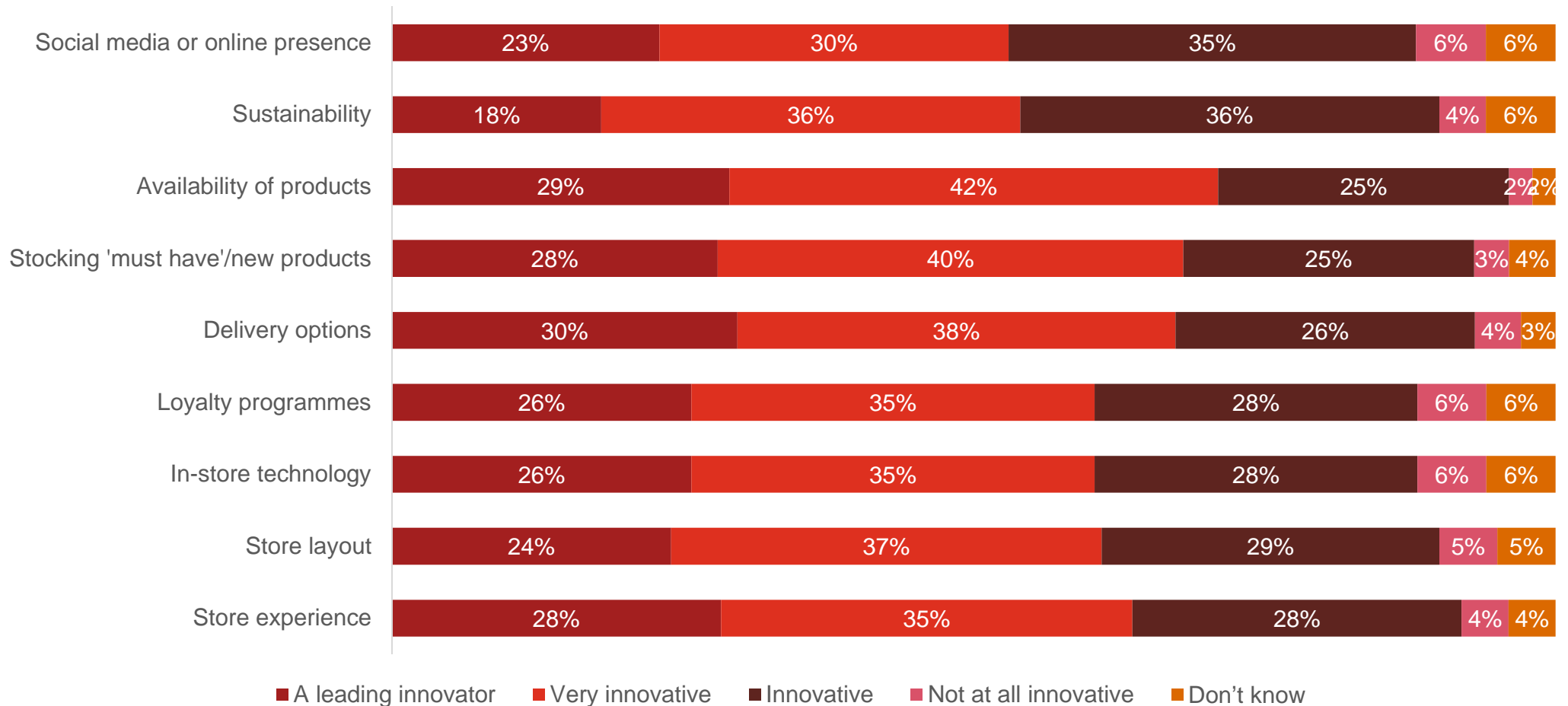


**Factors which would improve in-store experience: Women**



# The consumer is yet to decide the ‘most innovative retailer’

*How innovative do you consider your favourite retailer to be, with regards to the following areas?*



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# Thank You

**For any queries please contact**

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