Consumers in the Digital World

Hyperconnectivity and Technology Trends

EUROMONITOR INTERNATIONAL

CONSUMERS IN THE DIGITAL WORLD: HYPERCONNECTIVITY AND TECHNOLOGY TRENDS

AN EXTRACT FROM THE HYPERCONNECTIVITY SURVEY 2014

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The following sections are top-line extracts from the full Consumers in the Digital World: Hyperconnectivity and Technology Trends report. The report is a comprehensive summary of results from Euromonitor International's Hyperconnectivity survey, undertaken in 2014, which includes responses from over 8,000 online consumers in 17 emerging and developed markets: Australia, Brazil, China, Colombia, France, Germany, India, Indonesia, Japan, Mexico, Middle East (UAE and Saudi Arabia), Russia, Spain, Turkey, United Kingdom and the US.

For more detailed analysis on the topics highlighted in this extract, including business implications and recommendations, the full report is available here.

THE HYPERCONNECTED CONSUMER

Exploring the impact of technology on today's global consumer

Today, even the most innovative companies are worried about how to better connect with consumers who are simultaneously more informed and more distracted than ever before. In developed markets, technology permeates nearly every part of the day for many consumers, from checking a weather app first thing in the morning to taking a midday online shopping break to curling up with an e-book before bed. In emerging markets, internet and smartphone access is growing exponentially every year, and online retail sales are catching up to the totals seen in developed markets. Family and friends in different parts of the world can interact face-to-face with their loved ones via online video chat, message a representative of their favourite brand to ask a question via social networking app, or complain to other users and the world at large about a poor product or service experience on a review site.

Mobile phones, especially, are leading the way to a new hyperconnected reality that is bringing people and technology increasingly closer together. Consumers have used mobile phones as a replacement for photos, music players, and GPS devices for years, and now they can leave credit cards, cash, and keys at home as well. Computers, tablets and even emerging wearable technology also have their place in the web of connections between consumers, devices, companies, and the wider world. In particular, these "hyperconnected consumers" have an evolving set of purchasing habits and preferences for interacting with the social and commercial worlds around them that are directly shaped by their heavy use of technology.

Studying the habits of hyperconnected consumers

To help companies position themselves for success with hyperconnected consumers, in December 2014 Euromonitor International surveyed 8,070 online consumers in 17 countries about their use of various tech devices, integration of technology into the shopping process, adoption of new platforms and capabilities, and attitudes toward online privacy and security. High-level results of this Hyperconnectivity survey are presented in this extract. The full report explores key regional and demographic differences as well as areas of future growth and opportunity in electronics, retail, e-commerce, banking and myriad other industries impacted by consumer use of technology.
The report is organised as follows:

LIST OF CONTENTS

DEVICE ACCESS AND ACTIVITIES

The digital landscape is evolving faster than ever before, and so are consumer attitudes, demands and expectations. Understanding what devices are found in the homes and pockets of consumers, as well as how, when and why they use them is an important first step in connecting with the hyperconnected consumer. The first section of this report provides readers with a crucial 'lay of the land,' exploring global consumers' device ownership and online activities. Results highlighted include unique demographic distinctions, preferences for certain devices depending on the activity, and the ways in which technology is increasingly blurring lines between personal and professional life.

A look at device ownership, features and internet access

Consumers now have near-limitless choice when deciding what types of devices and features they will use to stay connected in the digital world. This section explores device ownership across a number of categories, including notable demographic trends and distinctions, and looks at common internet sources as well as popular operating systems and features.

Android and Apple dominate smartphone and tablet categories

Apple is often heralded as the world's most innovative technology brand, but survey results indicate that consumers are significantly more likely to own an Android. Globally, smartphone owners are three times more likely to use Google's Android operating system (67%) than an Apple operating system (22%). Android also dominates the tablet market: 62% of tablet owners use an Android operating system versus 32% who have an Apple tablet. Windows operating systems lag far behind both Android and Apple in the smartphone category and in the tablet space. Even fewer global consumers use a BlackBerry or Fire operating system.

Tablet and Smartphone Operating Systems
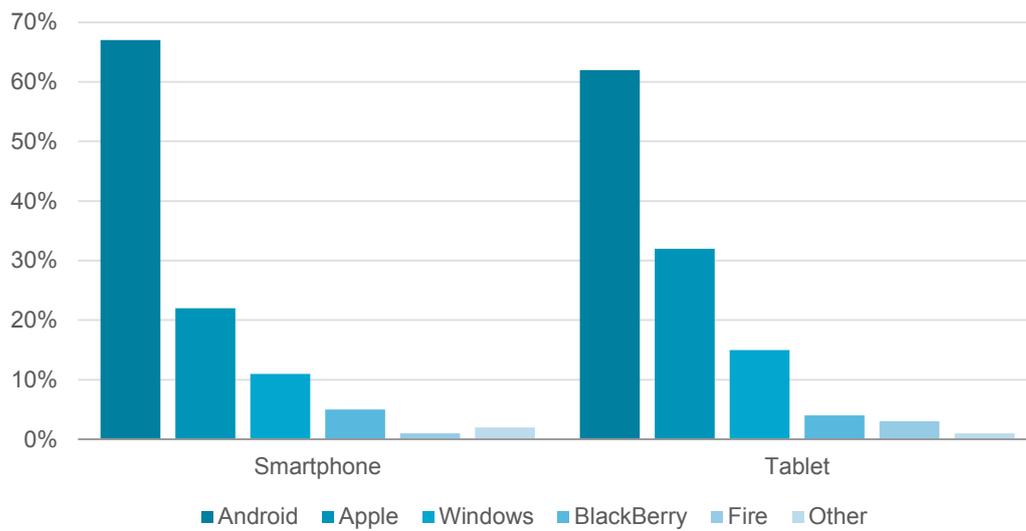
Source: Euromonitor International consumer survey, Hyperconnectivity Survey 2014
Note: Showing percentage of respondents who have access to device with noted operating system.
Global survey results include Australia, Brazil, China, Colombia, France, Germany, India, Indonesia, Japan,
Mexico, Middle East, Russia, Spain, Turkey, UK and the US.

Device-specific activities
of the hyperconnected consumer

From hailing a taxi to paying their bills, today's hyperconnected consumers integrate their tech devices into nearly everything they do. As a result of this reliance on technology, consumers now turn to specific devices for certain tasks, often driven by their physical location and the nature of the activity. For example, while smartphones may work best for quickly checking email while on the go, the larger screens of a laptop or tablet are preferable when watching a movie.

Consumers trust in computers when dealing with sensitive information

Consumers feel more comfortable using personal computers for activities involving financial information or monetary transactions, such as banking, paying bills and making purchases. This may be in part because many consumers still have concerns about the security of financial information transmitted through mobile devices (explored in more detail in the upcoming "Mobile Purchasing and Payments" section). However, smartphones do have a slight edge when it comes to tracking less-sensitive personal information, such as steps walked or calorie intake, as well as for remotely monitoring / controlling home devices.

Spending, Banking and Personal Tracking Activities, by Device

Source: Euromonitor International consumer survey, Hyperconnectivity Survey 2014
Note: Showing percentage of respondents who indicated that they used device for online activity in the past month. Global survey results include Australia, Brazil, China, Colombia, France, Germany, India, Indonesia, Japan, Mexico, Middle East, Russia, Spain, Turkey, UK, and the US.
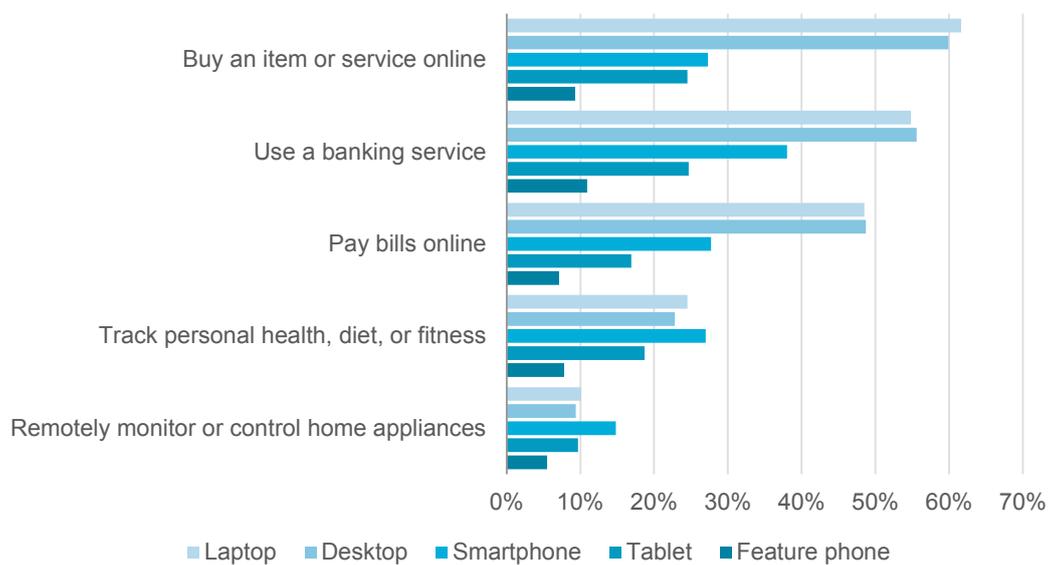
USE OF TECHNOLOGY IN SHOPPING

Constant access to the internet allows hyperconnected consumers to find product details, compare prices and buy just about anything they need from the comfort of their own home – or anywhere else they happen to be. Given this flexibility, purchase decision-making is now done on a number of devices and in multiple locations. Even with near-limitless tech options, however, some consumers still consider certain types of purchases and certain stops along the path to purchase better done in person than online. This section explores how consumers navigate media and retail channels from the onset of product research to the moment of purchase to post-purchase returns and customer support.

## Product comparison and research

Hyperconnected consumers make sure to do their homework before deciding what to buy; 94% go online to research a potential purchase in at least one product category, regardless of whether they end up buying it in a physical store or on a website. This section examines which channels and devices consumers prefer to use when researching products or comparing prices.

Computers are the top choice for comparing products and prices

Purchase decision-making starts with browsing product options, reviewing features and comparing brands. No matter the category, consumers prefer to kick off this part of the process on their computer. A laptop or desktop offers a larger screen and typically easier web navigation than a tablet or mobile phone, making it simple to scroll through product reviews or hop between various webpages. And since no brick and mortar retailer offers as many options as the internet, shoppers can get a much better sense of what is available by surfing the web rather than stopping in-store. That said, window shopping is not completely dead. Physical stores remain a relatively popular choice for researching household essentials and apparel. Both categories consist of products consumers may prefer to touch, taste or try on before buying and incur relatively little cost or commitment, making an extensive web search less necessary.

Devices and Channels Used for Product Research
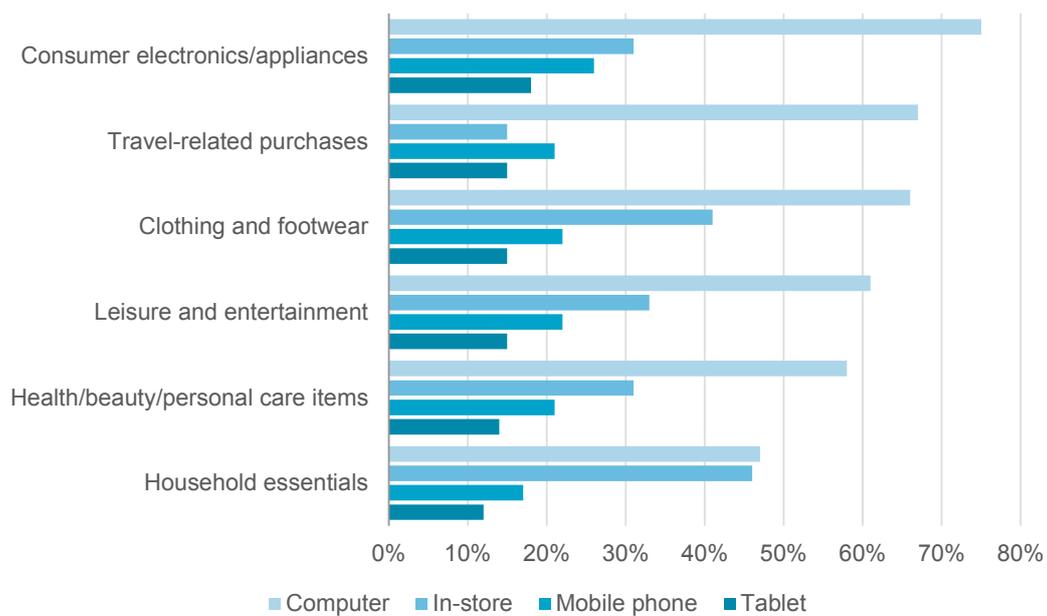
Source: Euromonitor International consumer survey, Hyperconnectivity Survey 2014
Note: Showing percentage of global respondents who indicated they typically browse / research products and compare brands through selected device. Global survey results include Australia, Brazil, China, Colombia, France, Germany, India, Indonesia, Japan, Mexico, Middle East, Russia, Spain, Turkey, UK, and the US.

Making the purchase

Although it is common for most internet-connected consumers to go online when researching product options and doing price comparisons, some still prefer to complete transactions in physical stores while others choose to check out online. In this section we compare typical online purchases (regardless of device) versus in-store purchases across age, region and category.

Two in three internet-connected consumers shop online for electronics and appliance purchases

The previous section showed that consumers tend to research electronics and appliances via the internet. Survey results indicate they often 'seal the deal' online as well. Two in three internet-connected consumers typically buy these types of gadgets online, with men especially prone to purchasing electronics and appliances through e-retail sites. However, brick-and-mortar electronics and appliance retailers still play an important role in the purchase process, often serving as 'showrooms' for those who want to test out a gadget in person before buying it online. See the "Trends in Showrooming and Webrooming" section for more.

Online Purchasing Habits, by Product Category

Source: Euromonitor International consumer survey, Hyperconnectivity Survey 2014
Note: Showing percentage of global respondents who indicated they typically make purchases online for selected category. Global survey results include Australia, Brazil, China, Colombia, France, Germany, India, Indonesia, Japan, Mexico, Middle East, Russia, Spain, Turkey, UK, and the US.
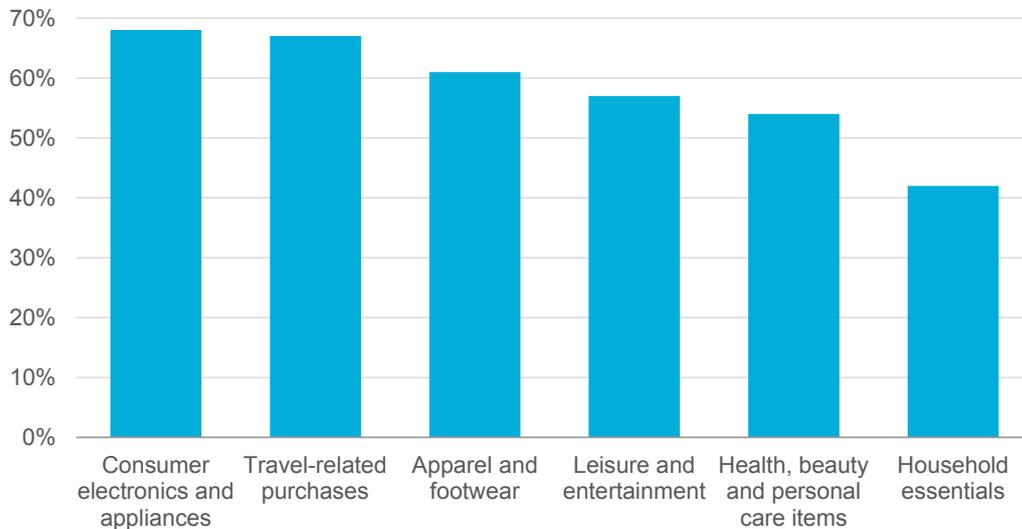
MOBILE PURCHASING AND PAYMENTS

As hyperconnected consumers become more comfortable making online purchases across a wide range of categories, many are also beginning to explore the convenience of buying these products from their mobile devices, either from the comfort of their couch or while on the go.

This section takes a closer look at technology used by consumers at the point of purchase, exploring which devices consumers prefer to pay with and where they are when they ultimately make a purchase online. This section also delves into the emerging arena of mobile payments, highlighting platforms used and barriers to adoption, as well as the small but growing world of in-store mobile payments. Throughout the section, important demographic distinctions – especially between emerging and developed markets – highlight challenges and opportunities for companies hoping to leverage new payment platforms.

Emergence of mobile shopping

As the capabilities of mobile devices continue to expand, more and more hyperconnected consumers are turning to their smartphones and tablets when making purchases. These devices are often more convenient to use than a traditional computer, particularly when shoppers are away from home, and mobile-specific apps can cut down on the number of steps between browsing and buying. This section explores the emergence of mobile shopping as an alternative to buying via computer, focusing on mobile preferences across regions and age groups.

Emerging market consumers more apt to make purchases via mobile phone

Use of mobile phones for online shopping varies widely by region. Emerging market consumers are much more likely than those in developed markets to shop via smartphone. Mobile purchasing is especially high in China and India – further evidence that these countries are at the forefront of e-commerce – although Turkey, Indonesia, Colombia and the Middle East are not far behind. The increased reliance on mobile purchasing in emerging markets may be impacted by the higher rates of smartphone ownership among internet-connected consumers in these countries. For example, 93% of Chinese respondents own or have access to a smartphone, compared with only 66% of French respondents.

Use of Mobile Phone for Making Purchases, by Country
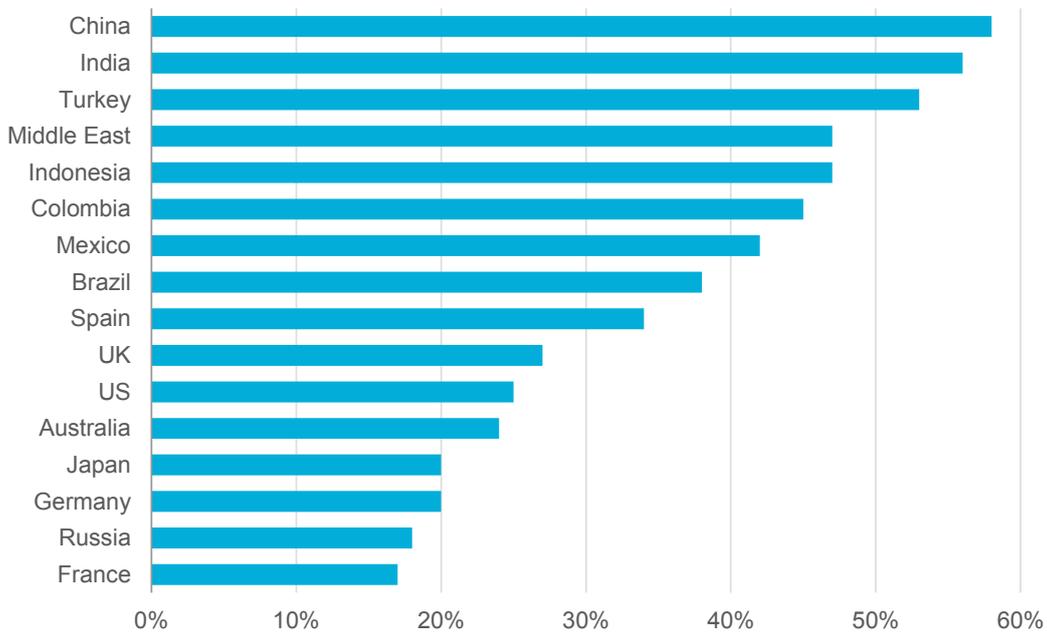
Source: Euromonitor International consumer survey, Hyperconnectivity Survey 2014
Note: Showing percentage of global respondents who indicated they use their mobile phone to make purchases in at least one product category.

Barriers to mobile shopping

When it comes to making purchases via mobile device, a number of barriers currently hinder adoption. These barriers, ranging from security concerns to issues of convenience, vary both by device and demographic group. For example, a small screen size may be hindering purchases made via smartphone, but is not an issue for tablet owners. Similarly, older consumers may feel uncomfortable sharing payment information over an unprotected network, while their younger counterparts may simply be frustrated by slow website loading times. In order to tailor their online retail presence to meet the current and future needs of hyperconnected consumers, brands and retailers need to understand the barriers that may be preventing some of their customers from using their mobile devices to buy products and services while away from home.

Security concerns and clunky interfaces prevent some purchases made via smartphone

Data theft remains a legitimate fear for many consumers (see the "Digital Futures" section for more on this) as well as a significant barrier to mobile shopping. When asked why they do not make purchases via smartphone, half of consumers cited privacy concerns. Other hurdles stifle smartphone shopping too. As discussed previously, consumers consider smartphones ill-suited for certain activities, and shopping is one of them. Well over half of consumers cite small screen size as one reason they do not make purchases via smartphone, while four in ten either believe smartphone displays are cumbersome and slow to load or just find purchasing via mobile phone inconvenient. Additionally, one-third of respondents do not shop on their phones because their preferred retailers' websites are not optimised for mobile.

Barriers to Mobile Shopping, by Device

	Mobile Phone	Tablet
Small screen size		
Security or privacy concerns		
Cumbersome to use or slow to load websites		
Inconvenient		
Prefer to buy in physical stores		
Website is not optimized for mobile		
Poor or unreliable connectivity		
Difficult to enter payment and shipping information		
Mobile websites do not have the same features as traditional websites		
No store-specific app available		
App interface is not intuitive		
Not enough room on phone to download app		
Cannot buy sought-after products this way		

■ Mobile Phone ■ Tablet

Source: Euromonitor International consumer survey, Hyperconnectivity Survey 2014
Note: Showing percentage of global respondents who indicated they do not make purchases via mobile device for selected reasons. Global survey results include Australia, Brazil, China, Colombia, France, Germany, India, Indonesia, Japan, Mexico, Middle East, Russia, Spain, Turkey, UK, and the US.

TRENDS IN SHOWROOMING AND WEBROOMING

As hyperconnected consumers enjoy more shopping options, many are turning to both digital and physical retailers for different pieces of the purchase decision-making process. For some purchases it may be essential to examine or try on an item in person, but not as necessary to make the purchase in a physical store, especially if a better price can be found online. On the other hand, as highlighted in the "Use of Technology in Shopping" section above, nearly all online consumers turn to the internet for some portion of their product research, but many then visit a store to make their purchase. These two phenomena, known as "showrooming" and "webrooming" respectively, are explored in this section.
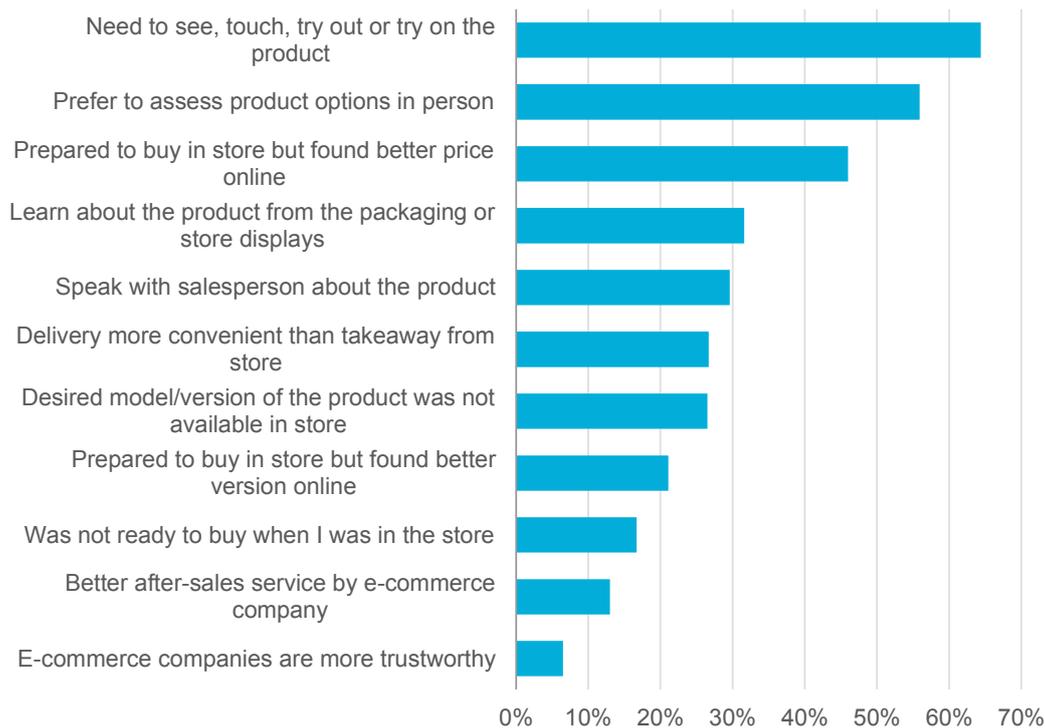
Exploring the role of showrooming with the hyperconnected consumer

As noted above, "showrooming" describes the act of researching a product in-store before buying it online. This section examines this shopping trend in greater detail, examining how consumer behaviours vary by category or demographic group and exploring emerging opportunities for physical and online retailers to combat (or take advantage of) channel-switching through a more innovative shopping experience.

Online discounts compel consumers to showroom

Because e-retailers do not have to pay for cashiers or maintain a physical retail space, they are often able to offer items at a lower price than their brick-and-mortar counterparts. This advantage has helped e-commerce players like Amazon and Alibaba undercut or even eliminate competitors. Some have worried that traditional retail stores may become little more than showrooms for consumers to check out products in person before buying online (which is how the term showrooming originated) and survey results suggest that this fear is not unwarranted. Nearly half (46%) of consumers say they check out products in-store before buying online because the internet offers better prices.

Reasons for Reviewing Products In-Store before Purchasing Online

Reason	
Need to see, touch, try out or try on the product	~64%
Prefer to assess product options in person	~56%
Prepared to buy in store but found better price online	~46%
Learn about the product from the packaging or store displays	~31%
Speak with salesperson about the product	~29%
Delivery more convenient than takeaway from store	~27%
Desired model/version of the product was not available in store	~27%
Prepared to buy in store but found better version online	~21%
Was not ready to buy when I was in the store	~17%
Better after-sales service by e-commerce company	~13%
E-commerce companies are more trustworthy	~7%

Source: Euromonitor International consumer survey, Hyperconnectivity Survey 2014
Note: Showing percentage of global respondents who indicated they review products in-store before purchasing online for selected reasons. Global survey results include Australia, Brazil, China, Colombia, France, Germany, India, Indonesia, Japan, Mexico, Middle East, Russia, Spain, Turkey, UK, and the US.

Exploring the role of webrooming with the hyperconnected consumer

Even more of a recent trend than the showrooming phenomenon detailed above, webrooming describes the act of researching a product online before buying it in a physical store. This section examines webrooming habits among hyperconnected consumers in greater detail, examining how consumer behaviours vary by category or demographic group.

Internet used to gather information before buying in-store

As discussed previously, the main reason consumers examine products in-store before buying online is because they want to see, test or try them on first. The need to experience a product first-hand can also compel consumers to do the reverse and research a product online, but wait to buy until they have seen it in-store. Nearly half (48%) of consumers cite this as a reason for 'reverse showrooming', also known as 'webrooming'. However, the top reason consumers research products online before buying in-store is to gather information. Fifty-five percent sort through product options on the internet before heading to the store, while another 44% use online user reviews or listings to guide their in-store decision. These findings suggest that consumers turn to the internet for learning about products and turn to brick-and-mortar for trying out products.

Reasons for Reviewing Products Online before Purchasing In-store

Source: Euromonitor International consumer survey, Hyperconnectivity Survey 2014
Note: Showing percentage of global respondents who indicated they review products online before purchasing in-store for selected reasons. Global survey results include Australia, Brazil, China, Colombia, France, Germany, India, Indonesia, Japan, Mexico, Middle East, Russia, Spain, Turkey, UK, and the US.
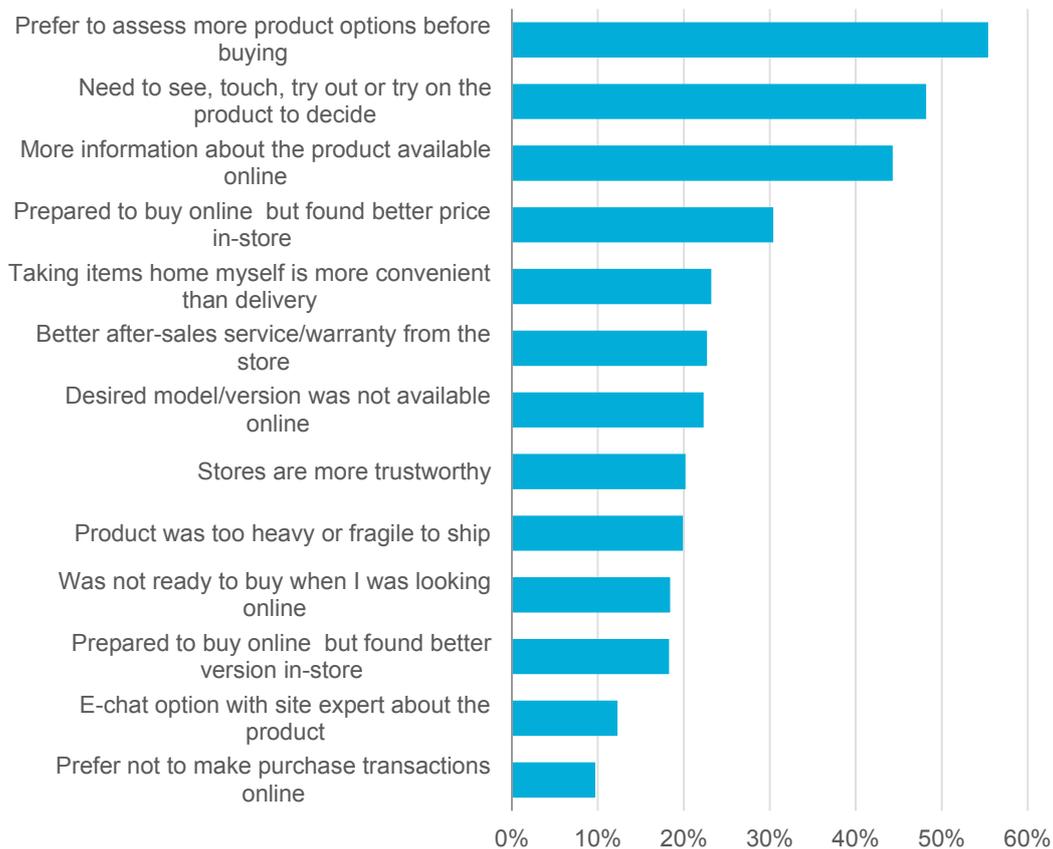
THE FUTURE OF RETAIL

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With so many channels, devices and platforms to choose from – and more emerging every day – how will retailers keep shoppers on their turf? Where does technology fit into the store of the future? And how can marketers leverage new digital media platforms to engage with consumers before they even enter the store? This section explores these questions through the lens of several future-forward issues, including in-store mobile payments, social media engagement and location-based mobile marketing.
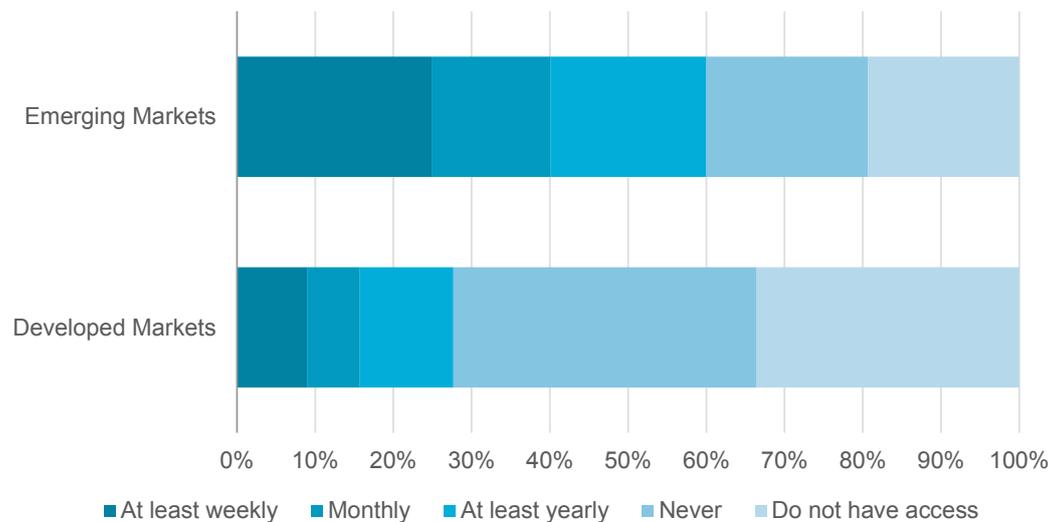
In-store mobile payments

As outlined above, many consumers crave a more tech-forward in-store shopping experience. Although brick-and-mortar retailers can integrate technology throughout the store, some of the most recent innovations are being implemented at the check-out line. This section explores current usage of in-store payment technology, barriers to use, and opportunities for wider adoption.

In-store mobile payment adoption much greater in emerging markets

Emerging market consumers are much more likely than those in developed markets to have used in-store mobile payment technology at least once, including 25% who tap or swipe on a weekly or daily basis. Developed market consumers are not only less likely to use in-store mobile payments technology, they are significantly less likely to have access to these capabilities at all. Certainly, expanding access to in-store mobile payments will be critical to increasing adoption in these markets, but retailers and manufacturers should also strive to understand how and why the capabilities are thriving in emerging economies.

Frequency of In-Store Mobile Payments, by Market

Source: Euromonitor International consumer survey, Hyperconnectivity Survey 2014
Note: Showing frequency of using in-store mobile payment technology. Developed markets include Australia, France, Germany, Japan, Spain, UK and US; emerging markets include Brazil, China, Colombia, India, Indonesia, Mexico, Russia, Turkey, and the Middle East.
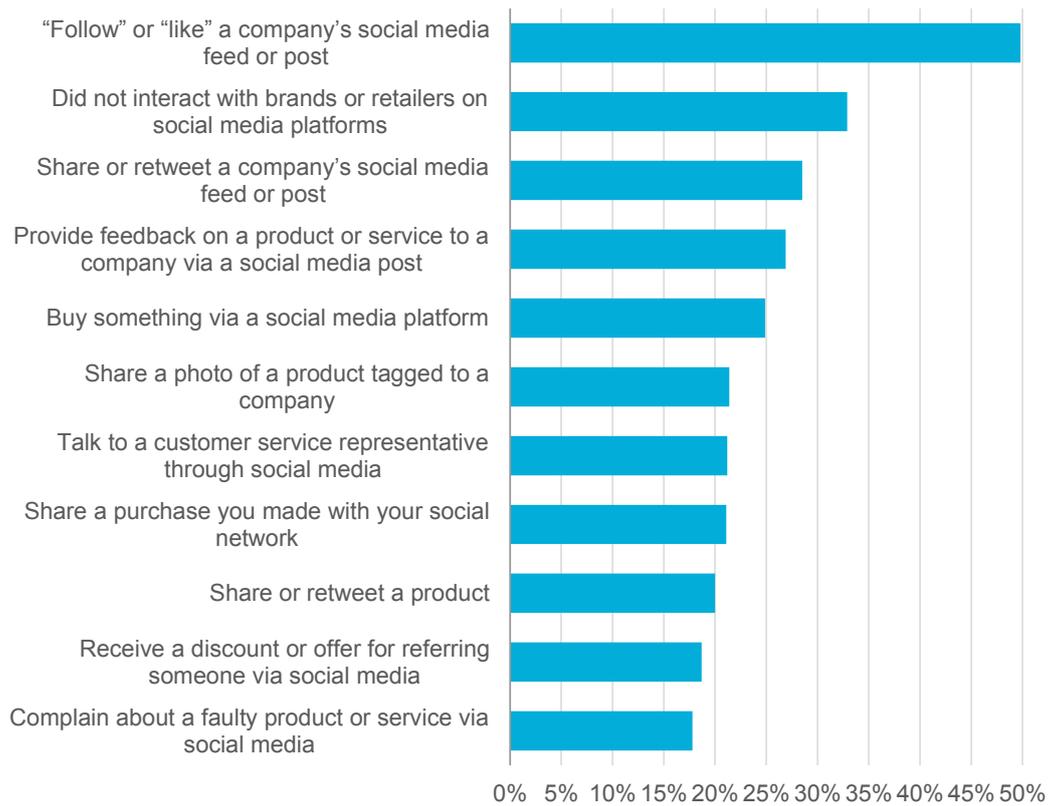
Future of brand-customer interactions

Besides connecting with consumers throughout the purchase process, brands and retailers are increasingly using digital media to reach consumers in their day-to-day lives. But marketers must tread carefully, as consumers are more comfortable with certain digital interactions than others. This section explores the opportunities and pitfalls for companies aiming to engage consumers via social media or through their mobile phones.

Social media users opt for passive rather than active engagement

Fans have numerous ways to engage with their favourite companies and brands, but most opt to keep the interaction passive. Simply following or liking a brand's Facebook or Twitter feed requires minimal commitment or effort, which may explain why respondents were nearly two times more likely to have had this type of interaction with a brand than any other. By contrast, the majority of consumers are reticent to engage with brands when the interaction involves spreading information to their wider social media circle. Just one in three respondents have shared or retweeted a company's social media post, while only two in ten have ever shared a photo of a company-tagged product, shared a purchase they made, or shared or retweeted a product. And because most consumers avoid promoting brands on social media, few have been rewarded for their efforts with a thank you or discount.

Interactions with Brands and Retailers on Social Media

Interaction	Percentage
"Follow" or "like" a company's social media feed or post	~50%
Did not interact with brands or retailers on social media platforms	~33%
Share or retweet a company's social media feed or post	~29%
Provide feedback on a product or service to a company via a social media post	~27%
Buy something via a social media platform	~25%
Share a photo of a product tagged to a company	~21%
Talk to a customer service representative through social media	~21%
Share a purchase you made with your social network	~21%
Share or retweet a product	~20%
Receive a discount or offer for referring someone via social media	~19%
Complain about a faulty product or service via social media	~18%

Source: Euromonitor International consumer survey, Hyperconnectivity Survey 2014

Note: Showing percentage of respondents who indicated they have engaged with a company or brand through each form of interaction. Global survey results include Australia, Brazil, China, Colombia, France, Germany, India, Indonesia, Japan, Mexico, Middle East, Russia, Spain, Turkey, UK, and the US.

DIGITAL FUTURES

This section examines the issues, attitudes and emerging technology that will shape hyperconnected consumers' digital lifestyles in the years ahead. From emerging capabilities like wearable tech and cloud storage to big-picture issues around ownership, privacy and shifts in media consumption that affect advertising, a firm grasp on the topics covered in this section will be critical for consumer goods and services companies hoping to stay ahead of the digital curve.

Wearable technology

Although more and more data is shifting to the cloud, the true frontier of new consumer electronics is wearable tech devices. Wearable technology refers to devices such as bracelets, glasses, clothing and other wearables that track information ranging from a user's health to their current location to social media updates. As the number of mainstream wearable technology products on the market continues to rise, companies must consider how these devices will impact the habits and needs of their customers, particularly those that are tech-forward. Even before these devices become widespread, marketers hoping to develop or leverage wearable technology should consider current usage and interest as well as opportunities and barriers to future adoption, all explored in the following section.

Consumers seek wearables that deliver unique safety or security benefits

The always-on-hand nature of wearable technology does confer certain advantages over handheld devices, especially when it comes to safety features. For example, 35% of consumers seek devices that enable hands-free calling or messaging, a somewhat safer way to communicate when driving or otherwise occupied. And while it is easy to forget or misplace a phone, wearable devices are physically attached to the body, which guarantees access and tracking ability. Thus general safety features, such as the ability to send distress signals, as well as devices that could be worn by a pet or person (such as a child or aging senior) or attached to an item as a form of theft-recovery, ranked fairly high on consumers' wish lists. By contrast, consumers expressed little interest in entertainment-related features such as gaming or augmented-reality, suggesting functionality may matter more than fun.

Interest in Wearable Technology Features
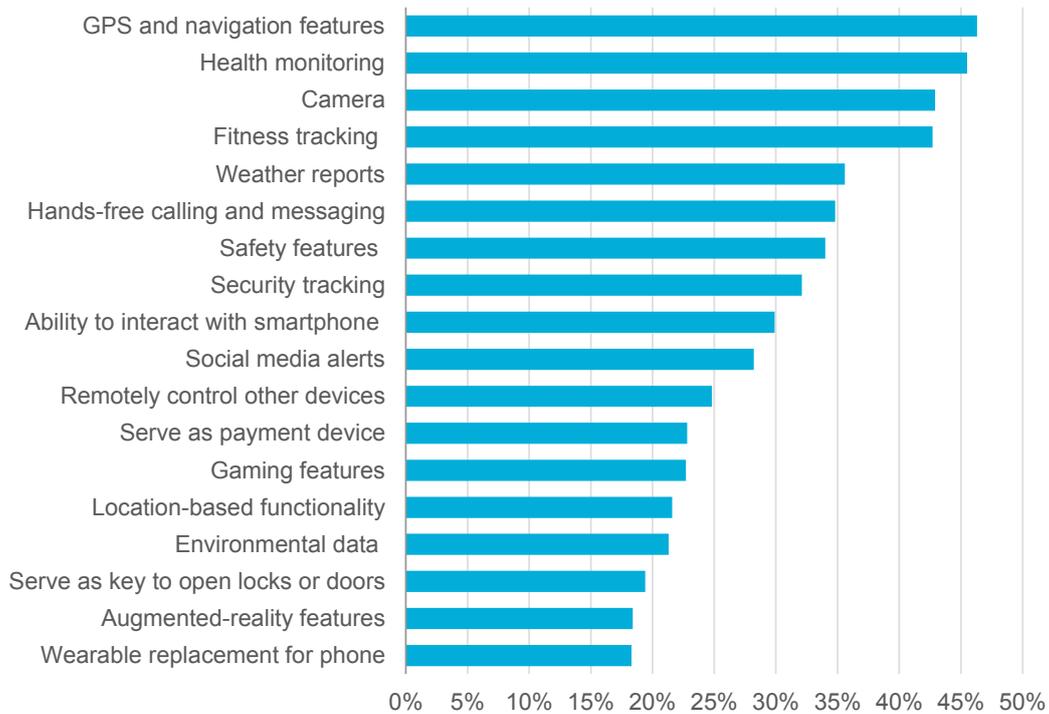
Source: Euromonitor International consumer survey, Hyperconnectivity Survey 2014
Note: Showing percentage of global respondents who indicated they would be interested in accessing selected feature via wearable device. Global survey results include Australia, Brazil, China, Colombia, France, Germany, India, Indonesia, Japan, Mexico, Middle East, Russia, Spain, Turkey, UK, and the US.

Internet privacy and security concerns

Although there is no doubt that hyperconnected consumers now rely
on the internet in many areas of life, including shopping and staying connected
with others, a significant proportion still express some hesitancy towards
technology adoption and the safety of the internet in general. This section takes
a closer look at these privacy and security concerns, offering insight into
the key issues marketers will need to overcome in the years ahead, especially
as more and more contact with consumers is made through their phones.

Most believe information shared online can be stolen or exploited

When asked where they stand on internet privacy issues, respondents
consistently leaned towards the suspicious side of the spectrum. Issues relating
to information security generated the strongest consensus. For example, 58%
of global consumers said they avoid public internet connections because they
believe those connections are not secure while just 18% do not worry
about the security of public internet. Respondents also expressed concerns
about e-commerce security and the potential abuse of personal information
posted online, generally agreeing that it is wiser to purchase items only
from trusted companies and better to withhold, rather than openly share,
personal information on the internet.

Attitudes toward Internet Privacy
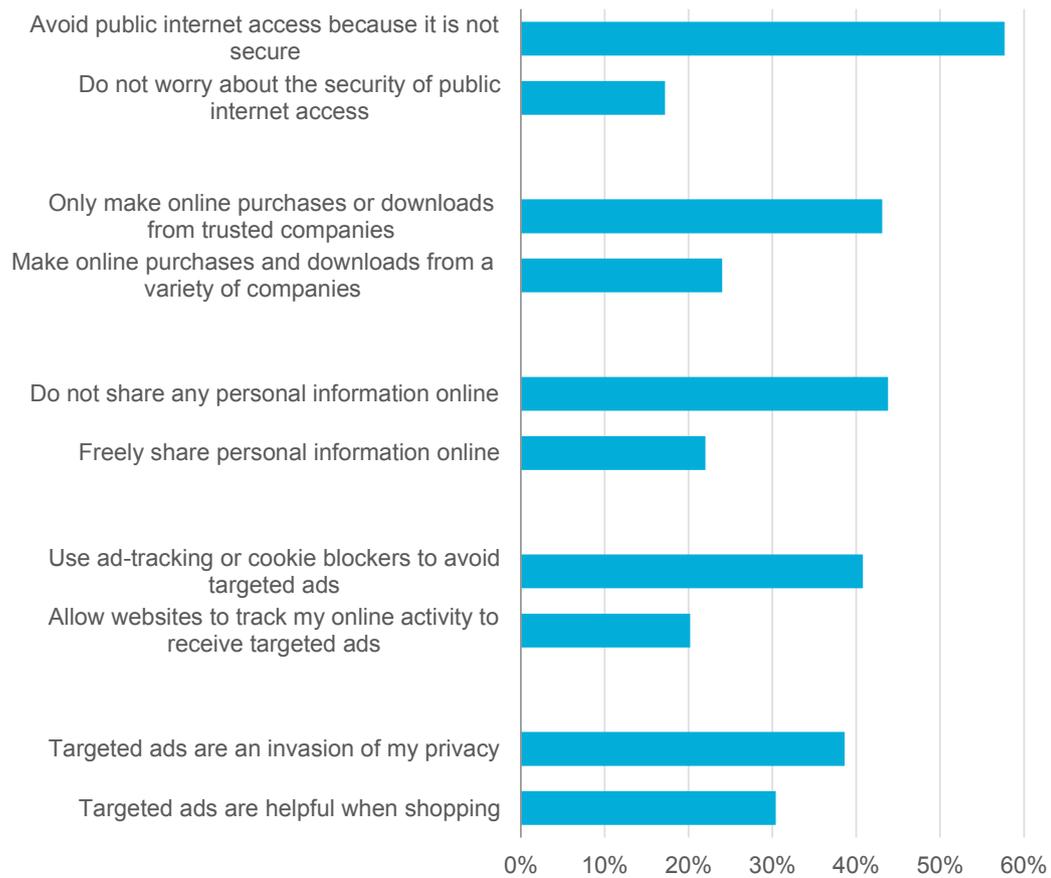
REACHING THE HYPERCONNECTED CONSUMER

In the years ahead, technology will only become more integrated and integral to global consumers' lives. Companies in every industry can and should embrace technological innovation, whether by building digital capabilities into physical products, launching apps or mobile tools, leveraging technology to improve the in-store experience, or simply designing a more user-friendly website. But remember: not all consumers are early adopters or avid technophiles. To overcome indifference, apprehension and an aversion to changing the status quo, companies must demonstrate how a new device or capability will personally benefit the consumer. Moreover, since personal benefits vary widely by age, region and lifestyle it is essential that marketers understand their target consumer's wants, needs, expectations and concerns. The final section of the full report uses the findings covered throughout to highlight key opportunities for businesses aiming to better engage with the hyperconnected consumer.

METHODOLOGY

This report presents the main, global results of Euromonitor International's Hyperconnectivity consumer survey. Complete results from the Hyperconnectivity survey, including country comparisons and intra-country demographic detail, are available in our Passport Survey database.

Focus and design

Survey, design, execution and analysis were developed collaboratively across teams within Euromonitor International, in conjunction with outside sample partners. All surveys were completed in local languages online across the 17 markets studied (Australia, Brazil, China, Colombia, France, Germany, India, Indonesia, Japan, Mexico, Middle East (UAE and Saudi Arabia), Russia, Spain, Turkey, United Kingdom and the US).

Fielding and data cleaning

A diverse set of online panellists in 17 markets were invited to participate in December 2014. Panellists were pre-screened to ensure that the sample included appropriate representation in each market for each age group (starting with 15-19 and going up to 65-69+) and for both genders.

After data cleaning of duplicate IP addresses and responses with fast completion times, 500 responses in each country were used in analysis (UAE and Saudi Arabia were combined into one "Middle East" region). Note, due to limitations in internet penetration, Indonesia and Middle East results only draw from respondents ages 15-59.

ABOUT EUROMONITOR

Euromonitor International is the world's leading provider for global business intelligence and strategic market analysis. We have more than 40 years of experience publishing international market reports, business reference books and online databases on consumer markets. Our Survey data, highlighted in this report, helps organisations understand the entirety of consumer life around the world.

We deliver market research solutions to support strategic planning for businesses of all sizes in today's increasingly international business environment. Our research offers in-depth market analysis on consumer goods and services industries worldwide, as well as economic, demographic and socioeconomic data and insight on countries and consumers.

Euromonitor International is headquartered in London, with regional offices in Chicago, Singapore, Shanghai, Vilnius, São Paulo, Santiago, Dubai, Cape Town, Tokyo, Sydney and Bangalore, and has a network of over 800 analysts worldwide.

Request a demonstration to learn more about our Consumer Survey Research, or purchase the full report here.