El Consumidor Multi-Canal en Costa Rica

Reporte General

Marzo, 2008

Investigación producida por:

Noosphera

the e-tailing group

Unimer RESEARCH INTERNATIONAL

Resumen Ejecutivo

- El perfil del costarricense quien acostumbra utilizar el Internet como parte de su proceso de toma de decisión para ejecutar una compra (25% en el GAM) es en mayor proporción **jóven**, **solvente económicamente** y con un **alto nivel de educación**. Aunque este mismo perfil se mantiene para quienes acostumbran realizar compras por Internet (9.4% en el GAM), adicionalmente se muestra una mayor incidencia de ejecución de compra entre los hombres y también las personas de más de 50 años.

- Un 18.7% de los Consumidores Multi-Canal han integrado el uso del Internet a su comportamiento de compra (ie, *siempre* o *casi siempre* lo utiliza como apoyo para su toma de decisión de compra). A nivel general, el principal uso que se le dá al Internet como parte del proceso de compra es el de **herramienta de investigación** (en especial el uso de buscadores web). También se reporta muestra un considerable uso del Internet para el **desarrollo de la relación con entidades comerciales** (ya sea obteniendo información específica sobre su ubicación o susbcribiéndose a sus comunicados vía correo electrónico). Los usos de menor incidencia son aquellos relacionados con la ejecución de la compra por Internet.

- Apenas 1 de cada 10 compras realizadas por Internet (13.5%) en el último año se han realizado con comercios ubicados en Costa Rica. Esto apunta a una oportunidad de negocio en-línea particularmente para las categorías con mayor incidencia de compra en relación con su investigación en-línea; específicamente: *Libros/CDs/DVDs, Ropa y Accesorios* y *Juguetes y Hobbies*.

- La **Confiabilidad** es el principal obstáculo para la ejecución de ventas por Internet ante el mercado costarricense. Los principales factores negativos percibidos en la realización de compras por internet tienen que ver con el manejo confidencial de información personal y financiera del usuario. En cierto modo la pérdida de confianza está ligada a los eventos recientes de correos electrónicos fraudulentos (*phishing bancario*), por lo que se vislumbra mayor potencial en la implementación de modelos de servicio que faciliten la valores de *eficiencia y conveniencia* a los usuarios (tal como el de generar órdenes vía canal electrónico para ser cancelados en efectivo contra entrega a domicilio).

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I. Introduction

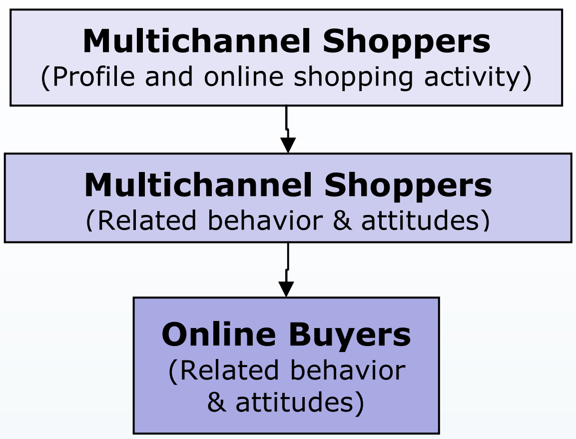
I.a. Main Objective

- **Understand the Costa Rica's consumer online-behavior from a multi-channel perspective.**

The term *multi-channel* refers to how the interaction with Internet-based technologies -such as websites and email, influence and contribute to the overall shopping & buying process of a consumer across channels (web, physical shop, catalog).

For this survey, the distinction between *shopping* and *buying* is of extreme importance, considering the latter term will imply completion of a commercial transaction through an online channel (i.e., website), whereas the former involves the online channel as an influential agent (i.e., for research) prior to taking part in the transactional process.

The research project structure is shown in the graphic, and detailed in the Specific Objectives below.



I.b. Specific Objectives

- **Phase I – Multi-channel Shoppers: Profile**
  - Incidence of people in Costa Rica who use the Internet at least once every two or three weeks (15-21 days), and who additionally have interacted in one way or another with the web as part of their shopping experience: **Multi-channel Shoppers**.
  - Demographic profile of Multi-channel Shoppers.
  - Usage of services known to facilitate online shopping behavior.
  - General Internet usage patterns.
  - Frequency of distinct shopping activities made on the Internet during the past year.

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- **Phase II – The Multi-channel Shoppers: Attitudes & Behavior**
  - The Research Process:
    - Information sources used to find new products/retailers or gather information on existing products/retailers available online.
    - Frequency of online product research before buying in a brick-and-mortar store.
    - Types of products/services they have researched online in the past year.
  - The eMail Communication Process:
    - Effects of Spam & Phishing on the use of email.
    - Factors contributing to build trust and its impact on consumers opening, reading and transacting from commercial emails.
    - Type of offers/promotions found most enticing on commercial emails.
  - The Online Purchase Process:
    - Negative inhibitors factors in consumers purchasing products/services online.
    - Evaluate the relative attractiveness of four different fullfilment service models.

- **Phase III – The Multi-channel Buyers: Profile, Attitudes & Behavior**
  Should have purchased a product/service online during the past 12 months (regardless of the country of origin).
  - Profile variation compared to the Multi-channel Shopper profile
  - Attitudinal variation compared to the Multi-channel Shopper profile
  - Types of products/services purchased online in the past year.
  - Country of origin for purchases made in the past year.
  - Approximate dollar value of online purchases made during the last year
  - Frequency of purchase

I.c. How to Read this Report

The chapters for this report follow the structure defined for the Specific Objectives of the study.

For the **General Report** findings are provided for the total sample base.

For the **Segmented Report** findings are additionally discussed in the following manner:

> *Analytical or anecdotal notes made by Lauren Freedman, President of the e-tailing group, which are oriented towards a practical interpretation of the results of the survey, based on her ample experience of e-commerce evolution, and multi-channel behavioral developments in the United States of America over the past 14 years.*

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II. Methodology

II.a. Research Framework

The geographic scope of the survey was limited to the Greater Metropolitan Area (GAM) of Costa Rica. This decision was of a practical nature (at least for this first edition of the study), as the GAM concentrates 57% of the national population[1], and 80% of all national economic activity[2].

- **Population Profile:**
  - Total Costa Rica: 4,504,013[3]
  - GAM: 57% (2,4 million)
- **Geographical Profile:**
  - Total Costa Rica: 51,090 sq km
  - GAM: 4% (2,044 sq km)

Additionally, the most recent Internet Penetration measurement for Costa Rica made by the International Telecommunications Unit[4] in order to estimate the number of interview contact points required to cover the target sample base of 300 interviews:

- Overall Internet Usage Penetration[5]:

CENTRAL AMERICA	Population (2007 Est.)	% Pop. C. A.	Internet Usage, Latest Data	% Population (Penetration)	% Users C. A.	Use Growth (2000-2007)
Belize	312,233	0.2 %	**38,000**	12.2%	0.9%	153.3 %
Costa Rica	**4,504,013**	**3.1 %**	**1,214,400**	**27.0%**	**30.1%**	**385.8 %**
El Salvador	6,672,218	4.5 %	**700,000**	10.5%	17.3%	1,650.0 %
Guatemala	13,110,745	8.9 %	**1,320,000**	10.1%	32.7%	1,930.8 %
Honduras	6,827,496	4.7 %	**344,100**	5.0%	8.5%	760.3 %
Nicaragua	5,701,141	3.9 %	**155,000**	2.7%	3.8%	210.0 %
Panama	3,172,537	2.2 %	**264,316**	8.3%	6.5%	487.4 %
TOTAL CENTRAL AM.	**146,757,829**	**100.0 %**	**4,035,816**	**2.7%**	**100.00%**	**708.0 %**

- Extrapolation of the Internet Usage figure to the population estimated for the **Greater Metropolitan Area**, derives into **35.6% Internet Usage penetration**.

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[1] XIII Informe del Estado de la Nación en Desarrollo Humano Sostenible; 2006.
[2] PRUGAM – Programa de la Unión Europea para la Planificación Regional y Urbana de la Gran Área Metropolitana del Valle Central de Costa Rica; 2007.
[3] Data contained in www.world-gazetteer.com; update: June 30, 2007.
[4] ITU is the leading United Nations agency for information and communication technologies. Country level penetration data is periodically updated at Internet World Stats.
[5] For a full comparison of Internet Penetration statistics against other countries, please visit Internet World Stats.

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II.b. Methodological Elements

- **Type of Survey**: Telephone interview.
- **Survey Execution Dates**: September 24th – October 10th, 2007
- **Research Instrument**: Structured interview, mainly consisting of closed questions (90%). Considering it is a telephone interview Participation typically took no more than 15 minutes.
- **Survey Population**: Women and men who reside in the Great Metropolitan Area, with ages between 18 and 70 years Note: Previous surverys have revealed a considerably lower Internet-usage incidence among those 50 or older).
- **Sample Framework**: UnimerRI national telephone number database.
- **Sample Size**: An initial sample base of 100 interviews were executed to measure incidence of target profile within the Great Metropolitan Area population. Upon completion of incidence metric, an additional 200 effective interviews were executed among people with same defined target profile.
- **Sample Design**: Random.
- **Sample Error**: Considering the sample size of 300 over the GAM population (estimated at 2.4 million); results from this survey consider a ±5.66% margin of error with a 95% confidence interval (Z=1.96).

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III. Multichannel Shoppers: Profile

III.a. Incidence Measurement

A decision was made over restricting the definition of a *multichannel shopper* as the person who:

1. *uses the Internet with a minimal frequency of at least once every 2 or 3 weeks; and that*
2. *had used the Internet as a support tool in the process of purchasing a product or service, during the last year on or offline.*

The series of activities that were used to apply the filter #2 were defined based on typical behaviors known to be related with multichannel shopping, and are detailed in ***Section III.e***.

Incidence of **Multichannel Shoppers** in the Greater Metropolitan Area of Costa Rica:

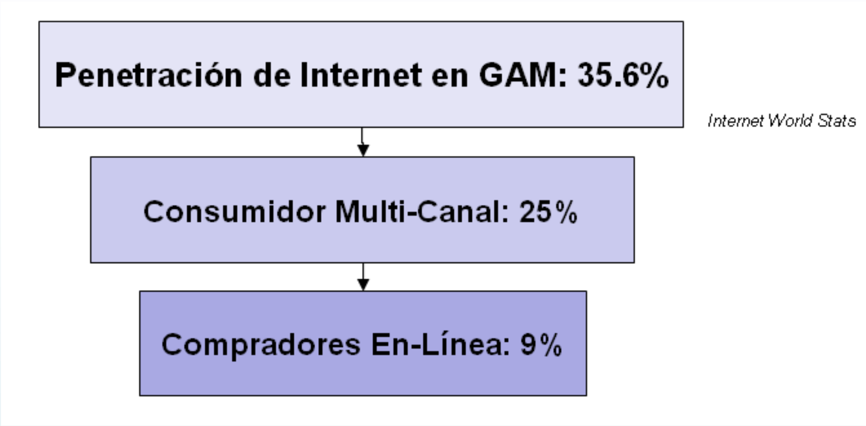
- Use the Internet at least once every 2 or 3 weeks
- Has made a shopping-related activity involving usage of the Internet in the past 12 months

= 25% of Population in the Great Metropolitan Area

Incidence of **Multichannel Buyers** in the Greater Metropolitan Area of Costa Rica:

- Use the Internet at least once every 2 or 3 weeks
- Has purchased a product or service using the Internet in the past 12 months

= 9.4% of Population in the Great Metropolitan Area



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III.b. Demographic Profile

	CR Adult GAM Population	CR Multichannel Shoppers (n=300)
Gender		
Male	50.0%	**50.0%**
Female	50.0%	**50.0%**
Age Group		
18-29	33.5%	**47.0%**
30-49	43.0%	**36.3%**
50 or more	23.5%	**16.7%**
Socioeconomic Level		
A/B	12.6%	**28.0%**
C	71.9%	**59.0%**
D/E	15.5%	**13.0%**
Education Level		
High School and below	68.0%	**22.7%**
University and above	32.0%	**77.3%**
Marital Status		
Single	-	**53.0%**
Married	-	**32.3%**
Living with Partner	-	**3.0%**
Widowed	-	**2.0%**
Divorced or Separated	-	**9.7%**
Nationality		
Costa Rica	-	**96.3%**
Foreign	-	**3.7%**

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III.c. Usage of Services Known to Facilitate Online Shopping Behavior

	CR Multichannel Shoppers (n=300)
Has an Active Credit Card	
Yes	**44.3%**
No	**55.7%**
Has an Active Debit Card	
Yes	**77.0%**
No	**23.0%**

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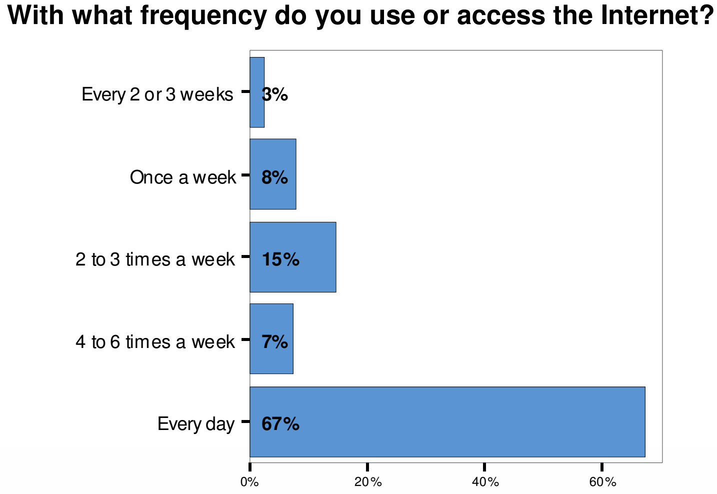
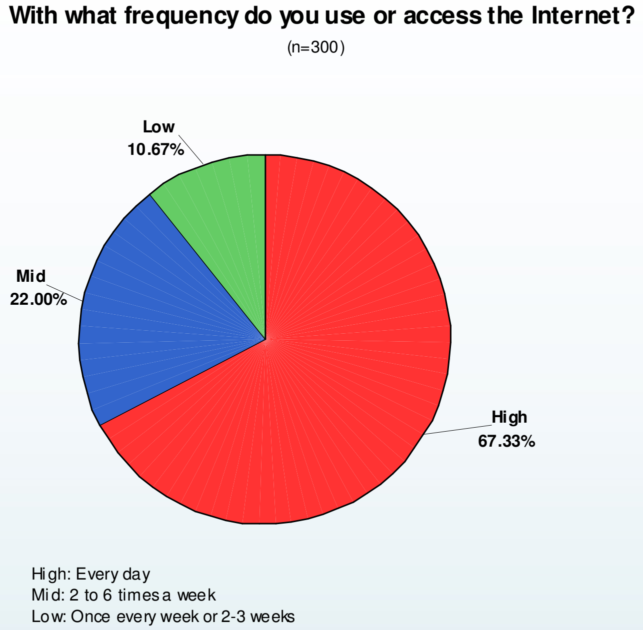
III.d. General Internet Usage Patterns

III.d.1 Internet Usage Frequency



In order to make better sense of a typology of Internet users, the answer to the question was recorded into three sub-groups:



It is not surprising that Costa Ricans exhibit a growing reliance on the Internet in their life. Its efficiency, control and convenience are unparalled for shoppers and information seekers alike.

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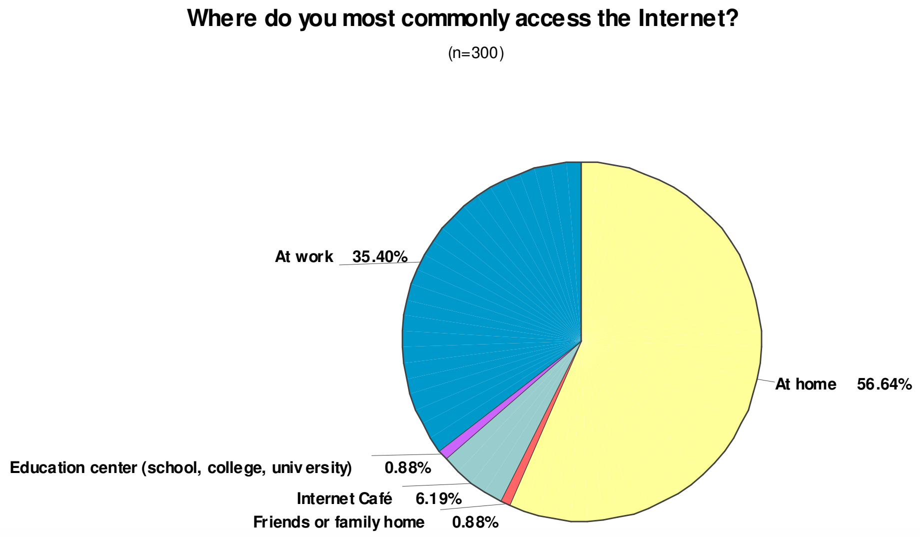
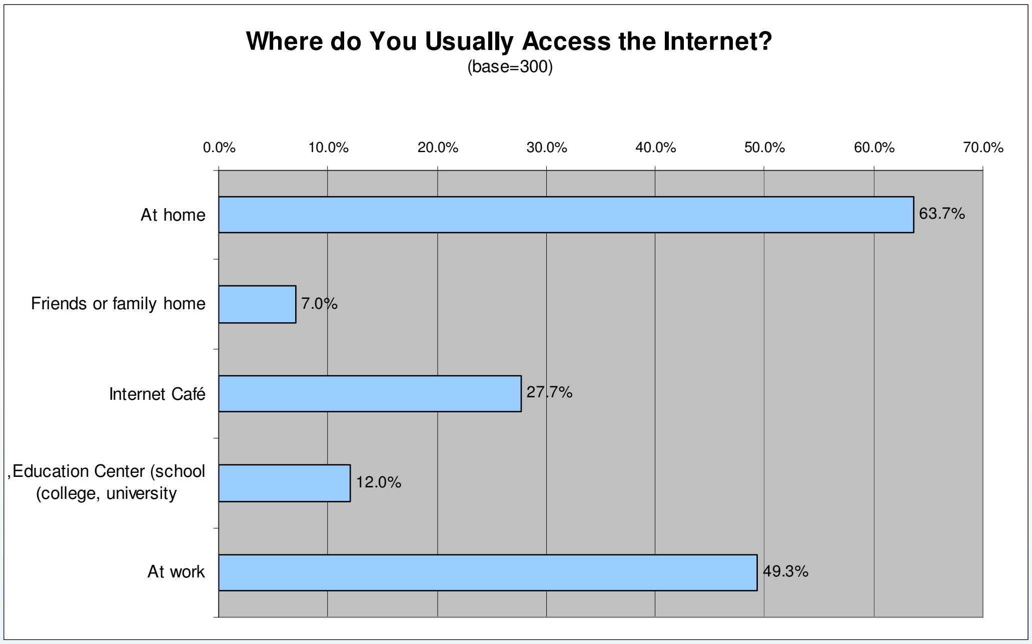
III.d.2 Internet Access Points





Work for us happened earlier and home was later as broadband moved into that market in later years. Broadband allowed merchants and media companies to extent content offerings and bandwith as they were no longer limited by connection speed..

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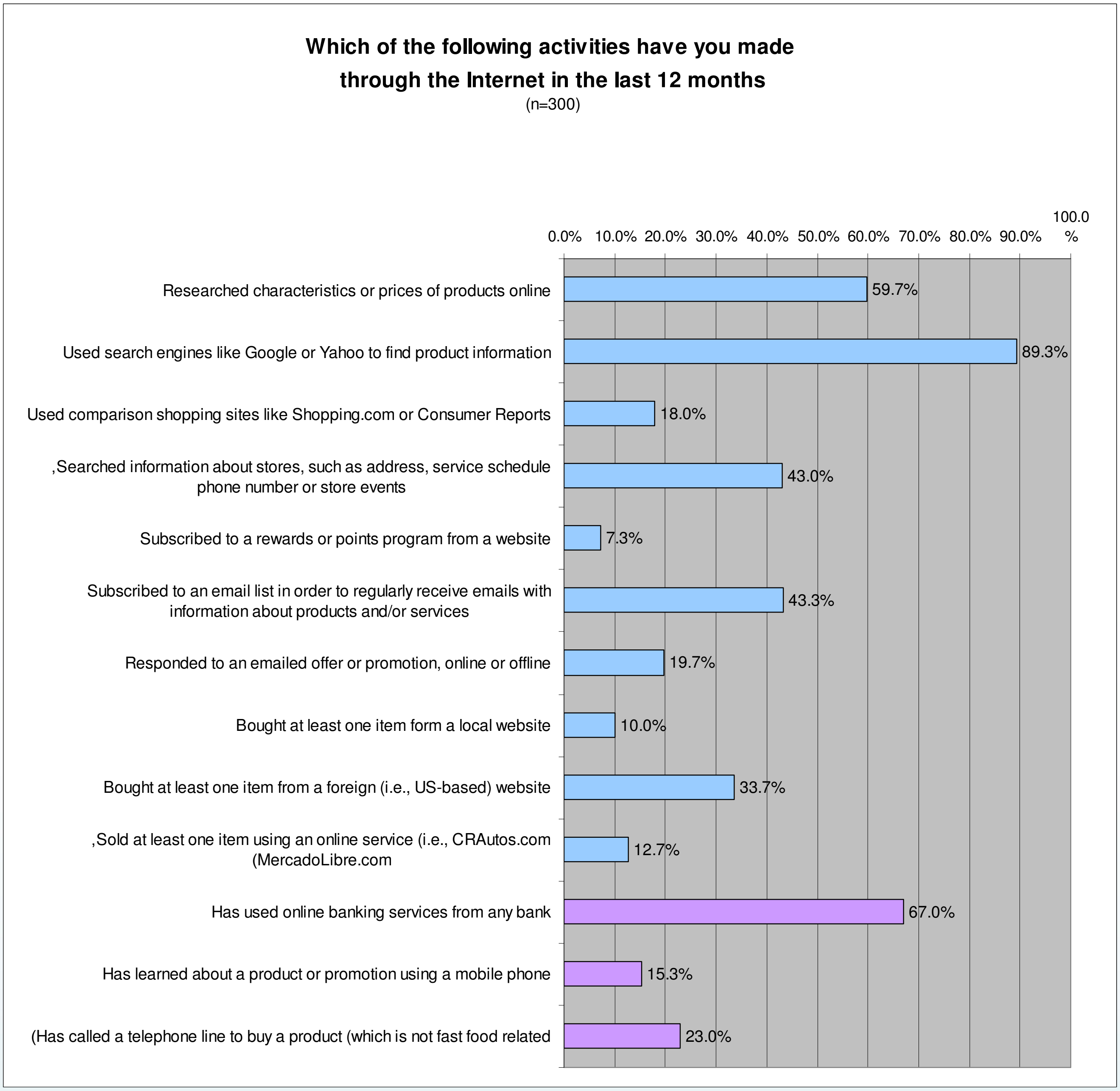
III.e. Shopping Activities on the Internet during the Past Year



Search is universal; price shopping and product research is very strong as well. Banking was always the trendsetter with significant early adoption. Retail loction access also has been high in US Note: over 90% of consumers in a 2005 e-tailing group studyindicated using retail locators)r. Promotions also resonate as the online channel facilitates seeking out deals and low prices. Subscriber signup seem low as compared to US standards but results of the study and privacy challenges support the findings.

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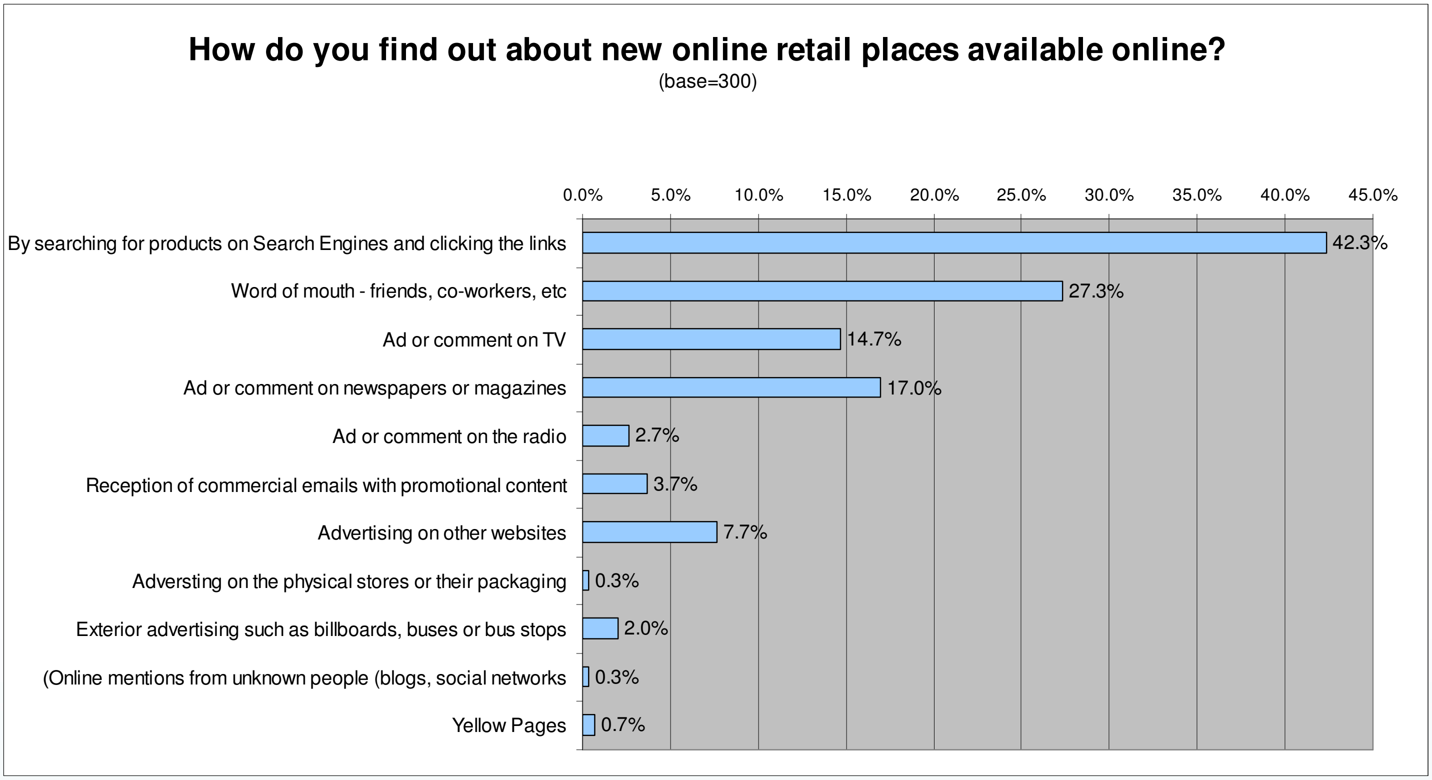
IV. Multichannel Shoppers: Attitudes & Behaviors

IV.a. The Research Process

IV.a.1 Information Sources Where New Retailers available Online are Found



Search not surprisingly tops the list. Word of mouth seems strong but we we're somewhat slower in that area, but has really been a factor of late. In the US market, search came later to the ecommerce game so patterns of influence were different thought word of mouth has also taken off.

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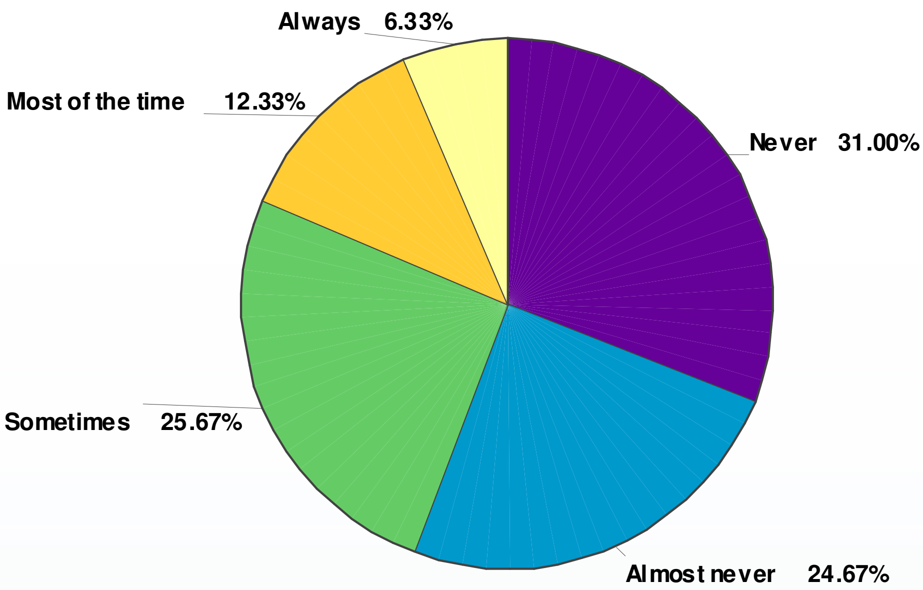
IV.a.2 Frequency of Online Product Research before Buying in a Brick-and-Mortar Store

How often do you research products online before buying them in a brick-and-mortar store?

(n=300)



Internet not yet integrated into behavior patterns of everyday life. In ther latest e-tailing group Mindset of a Multi-Channel Shopper Study 65% plan to research their gifts prior to purchasing online and this has been quite consistent in consumer research reporting over the past year.

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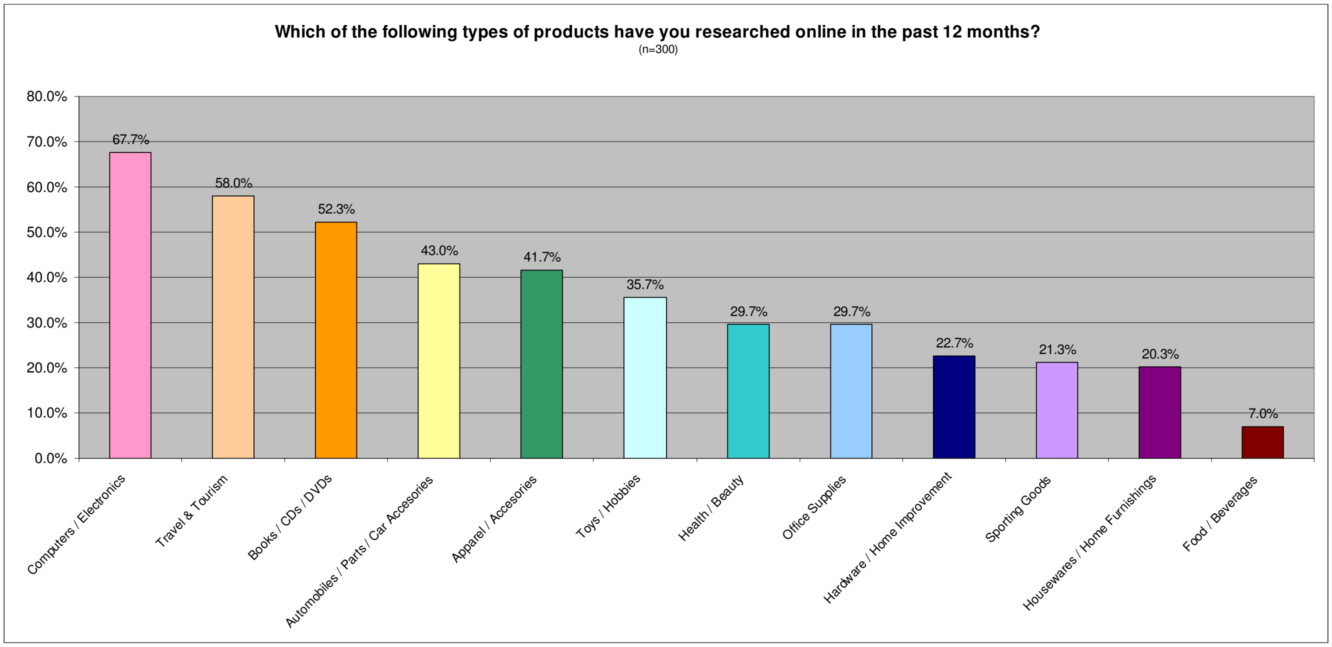
IV.a.3 Types of Product / Service that have been Researched Online in the Past Year



Broad assortment of interest; categories being research are similar to those in the US market, particularly computers, travel and books/music. With apparel now the # 1 category online, we see additional research interest in this category as well. .

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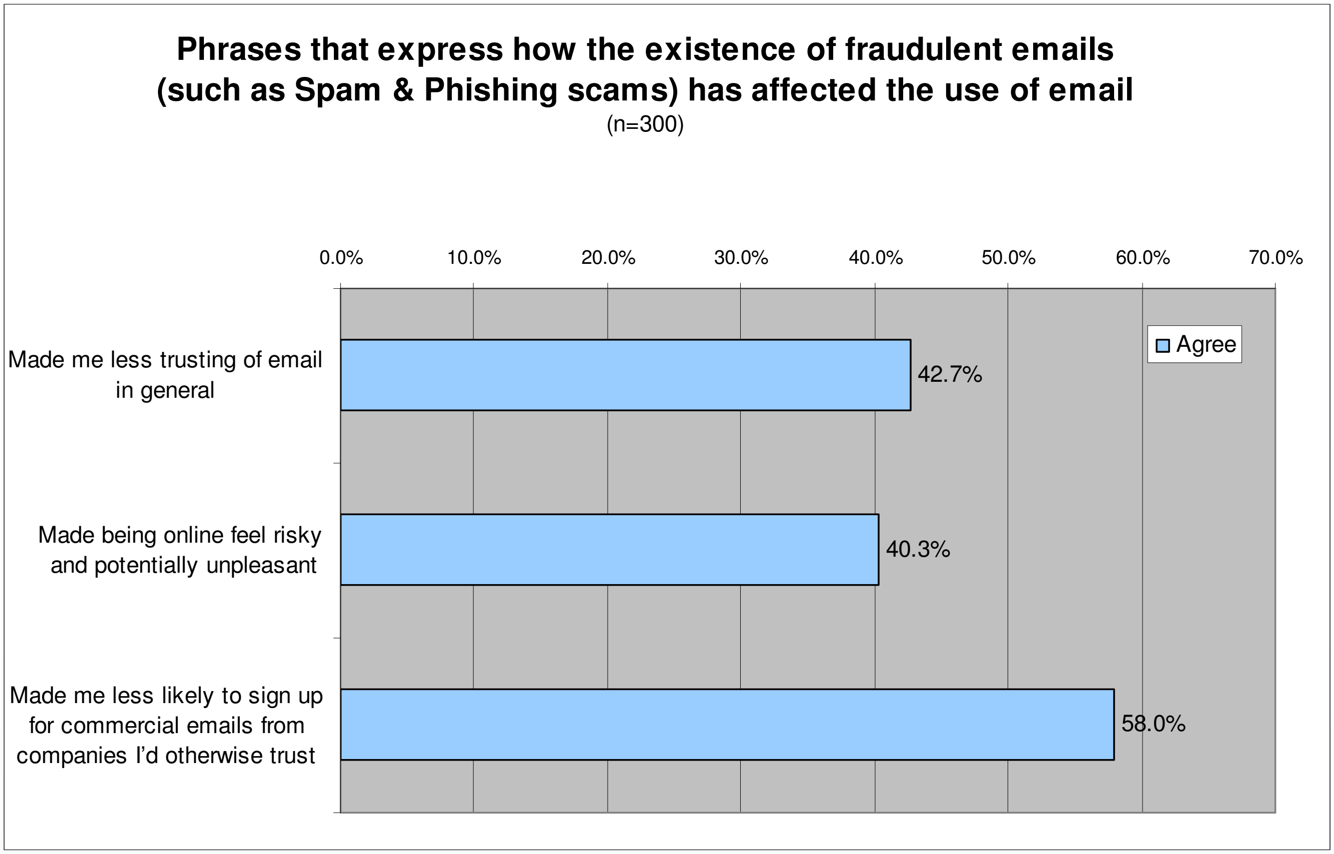
IV.b. The eMail Communication Process

IV.b.1 Effects of Spam & Phishing on the Use of eMail



Marketing opportunities are the big loser here. Merchants must be vigilant and join forces to give consumers confidence to become part of their community. They can then take advantage of the power of cost-effective email marketing strategies.

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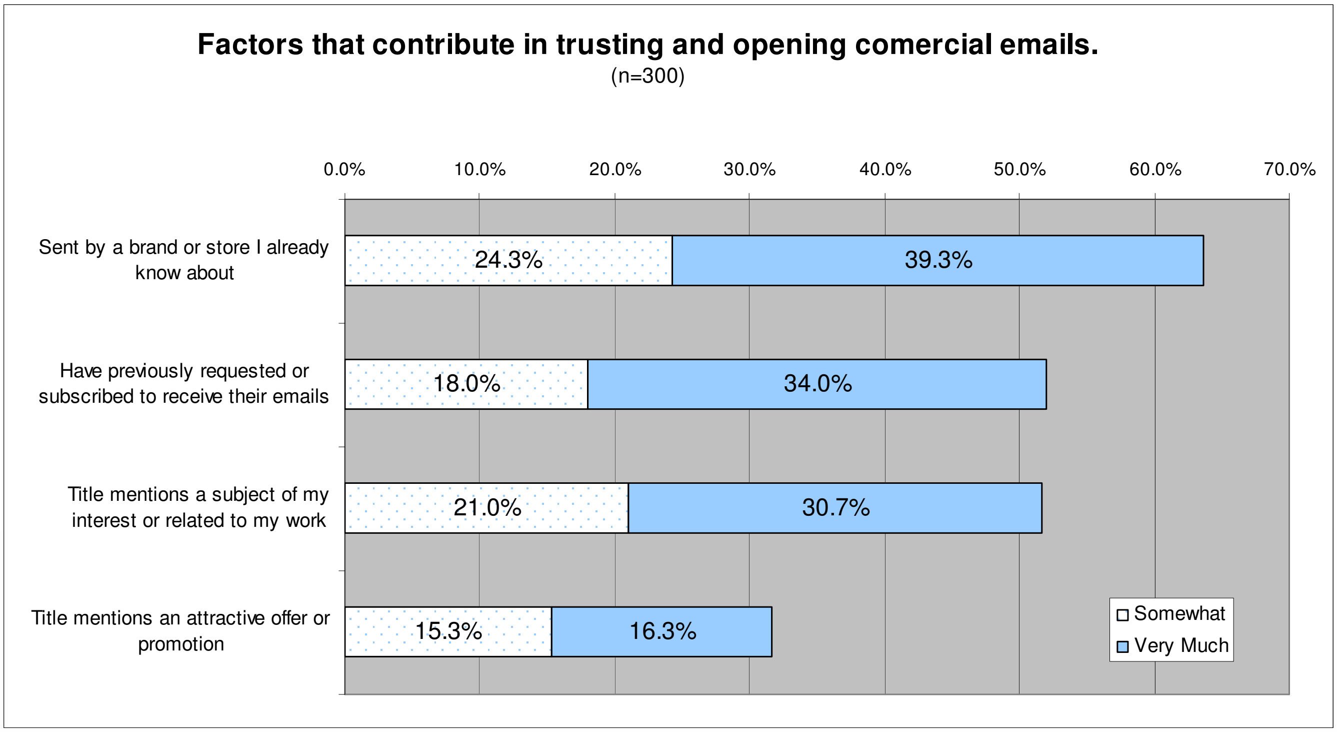
IV.b.2 Factors Contributing to Build Trust and Reading Commercial Emails



It's not the offer, it's the merchant or customer being in control!Merchants must capitalize on their brand clout to gather names and grow their online mailing lists. Multi-channel tie-ins solicited at retail can bolster these efforts.

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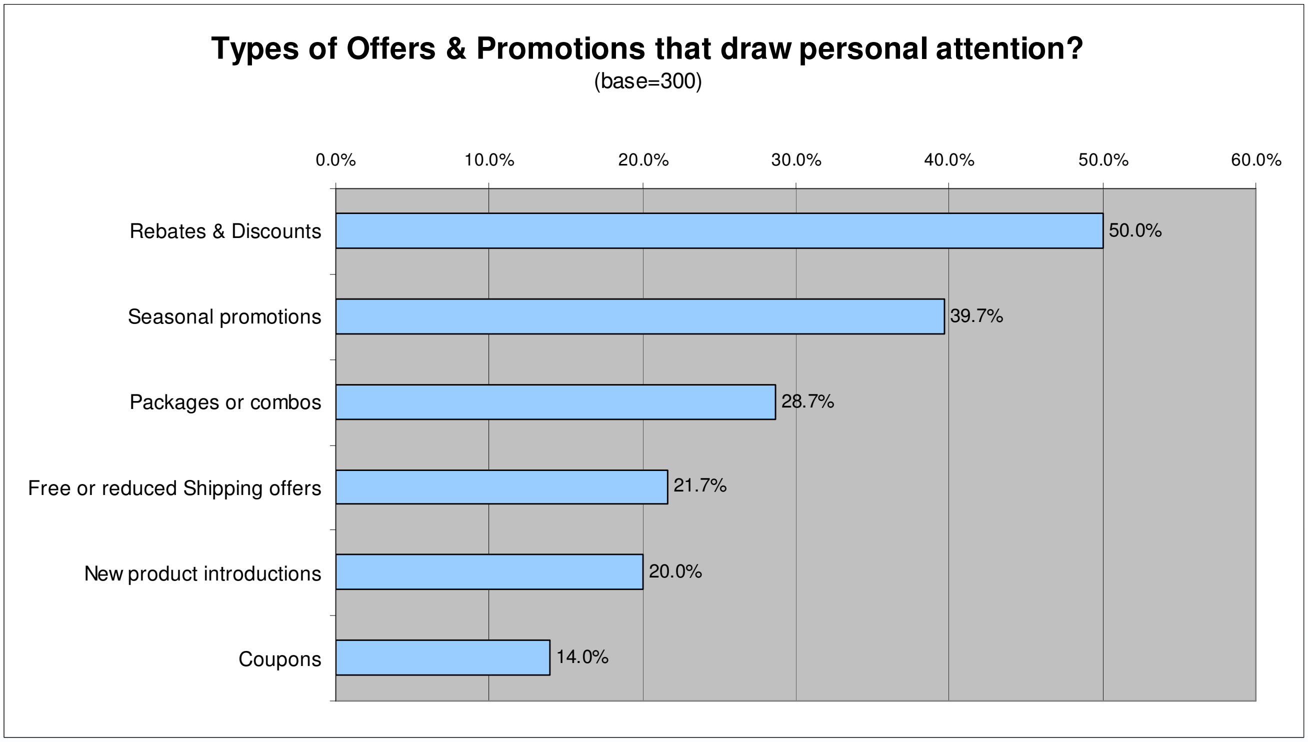
IV.b.3 Type of Offers / Promotions Found Most Enticing on Commercial Emails



Seasonal follows traditional retail patterns while customers always favor rebates/discounts. For US Free shipping dominates and would be the highest probably close to 90%.

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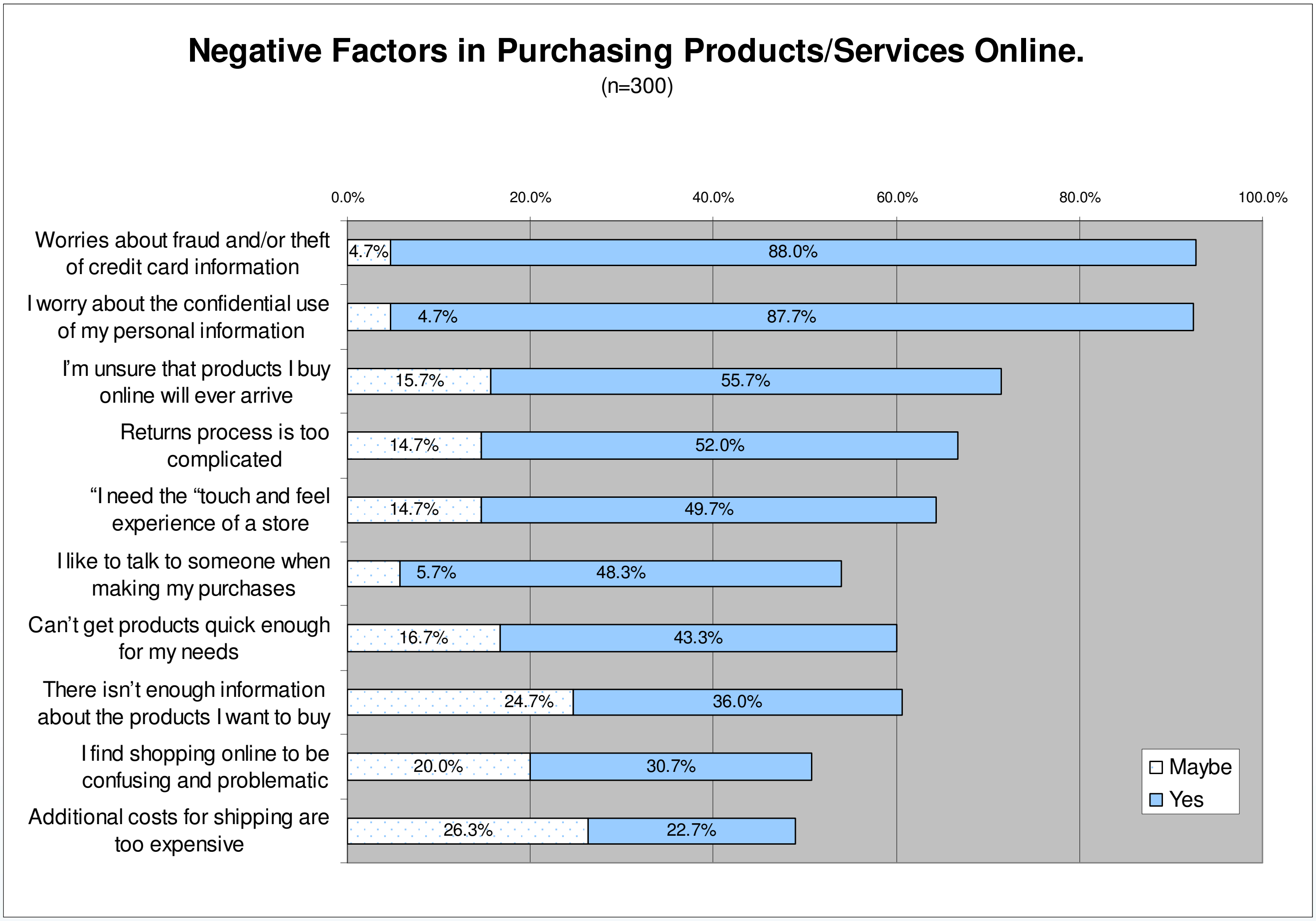
IV.c. The Online Purchase Process

IV.c.1 Negative Factors Found in Purchasing Products / Services Online



Convenience wins out for consumers so merchants must ensure timely deliveries and competent customer service. Security and safety/privacy must be overcome where merchants must band with credit card companies/banks to educate consumers about the risks. Today a recent study conducted AT USC Center for Digital Future found that 61% of Americans are concerned about privacy of personal information.

Rich media will serve to grow customer confidence and operational efforts will help to overcome timing challenges.

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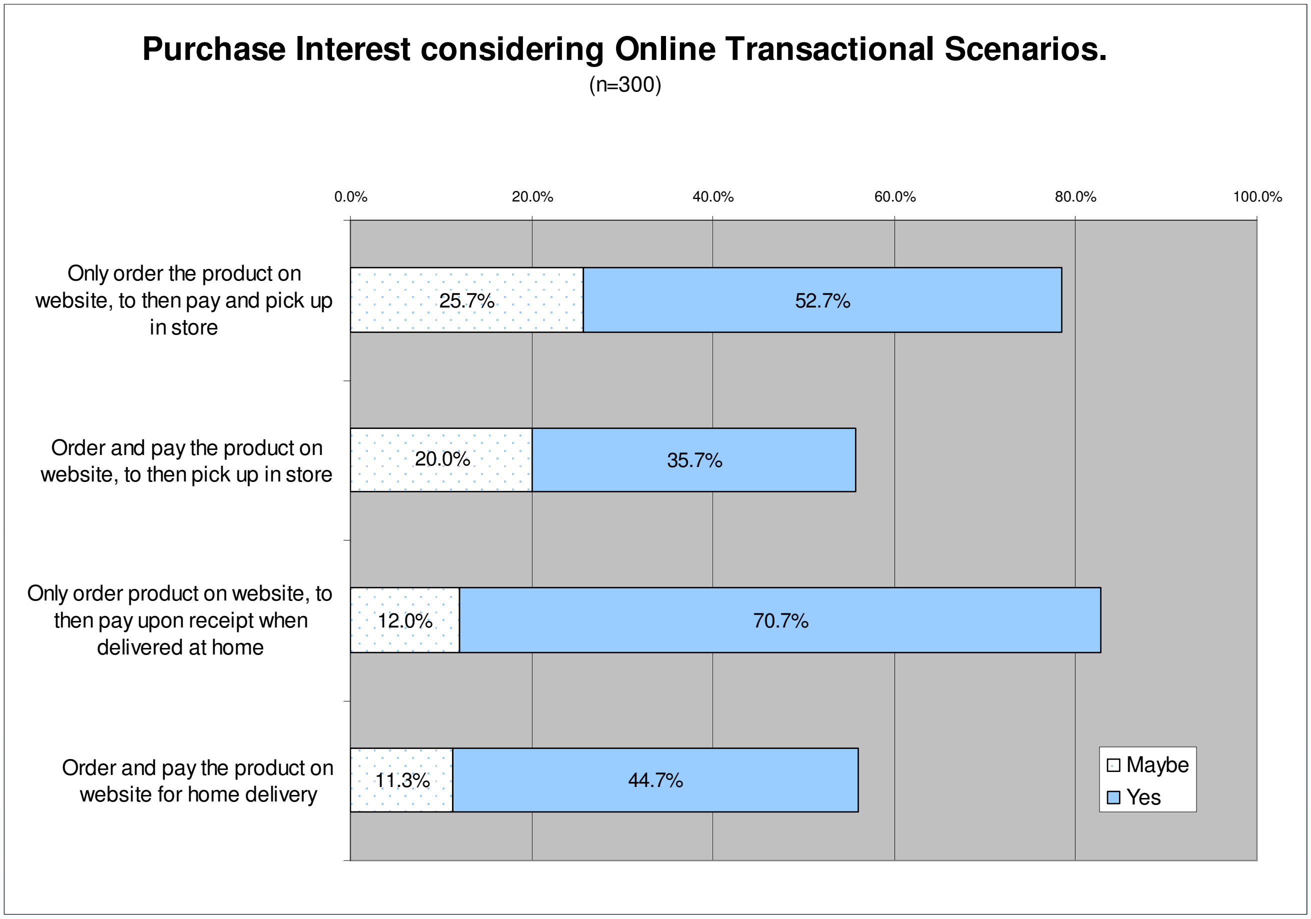
IV.c.2 Evaluation of Online Shopping Services Models



Connection to the store in Costa Rica appears to be very important and the web should be leveraged to drive customers into the stores where incremental purchasing will result. Systems and personnel must be able to accommodate consumer demands shifting Costa Rica consumer interest to home receipt optimizing future cross-channel success.

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V. Multichannel Buyers: Profile, Attitudes & Behaviors

V.a. Profile of Buyers Compared to Overall Respondents (Shoppers)

Incidence of **Multichannel Buyers** in the Greater Metropolitan Area of Costa Rica:

- Use the Internet at least once every 2 or 3 weeks
- Has purchased a product or service using the Internet in the past 12 months

= 9.4% of Population in the Great Metropolitan Area

	CR Adult GAM Population	CR Multichannel Shoppers (n=300)	CR Multichannel Buyers (n=113)
Gender			
Male	50.0%	50.0%	**57.5%**
Female	50.0%	50.0%	**42.5%**
Age Group			
18-29	33.5%	47.0%	**40.7%**
30-49	43.0%	36.3%	**35.4%**
50 or more	23.5%	16.7%	**23.9%**
Socioeconomic Level			
A/B	12.6%	28.0%	**46.0%**
C	71.9%	59.0%	**50.4%**
D/E	15.5%	13.0%	**3.5%**
Education Level			
High School and below	68.0%	22.7%	**11.5%**
University and above	32.0%	77.3%	**88.5%**
Marital Status			
Single	-	53.0%	**44.2%**
Married	-	32.3%	**36.3%**
Living with Partner	-	3.0%	**2.7%**
Widowed	-	2.0%	**1.8%**
Divorced or Separated	-	9.7%	**15.0%**

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	CR Adult GAM Population	CR Multichannel Shoppers (n=300)	CR Multichannel Buyers (n=113)
Nationality			
Costa Rica	-	96.3%	**94.7%**
Foreign	-	3.7%	**5.3%**

The resulting profile seems to match the US early adopters as younger men were bigger shoppers initially. Will access data depending on how you approach accessing results. I believe there are tables in "it's just shopping" book as well.

V.b. Attitudes & Behavior of Buyers Compared to Overall Respondents (Shoppers)

	CR Multichannel Shoppers (n=300)	CR Multichannel Buyers (n=113)
Has an Active Credit Card		
Yes	**44.3%**	56.6%
No	**55.7%**	43.4%
Has an Active Debit Card		
Yes	**77.0%**	85.0%
No	**23.0%**	15.0%

This of course is the big difference vs. US market.

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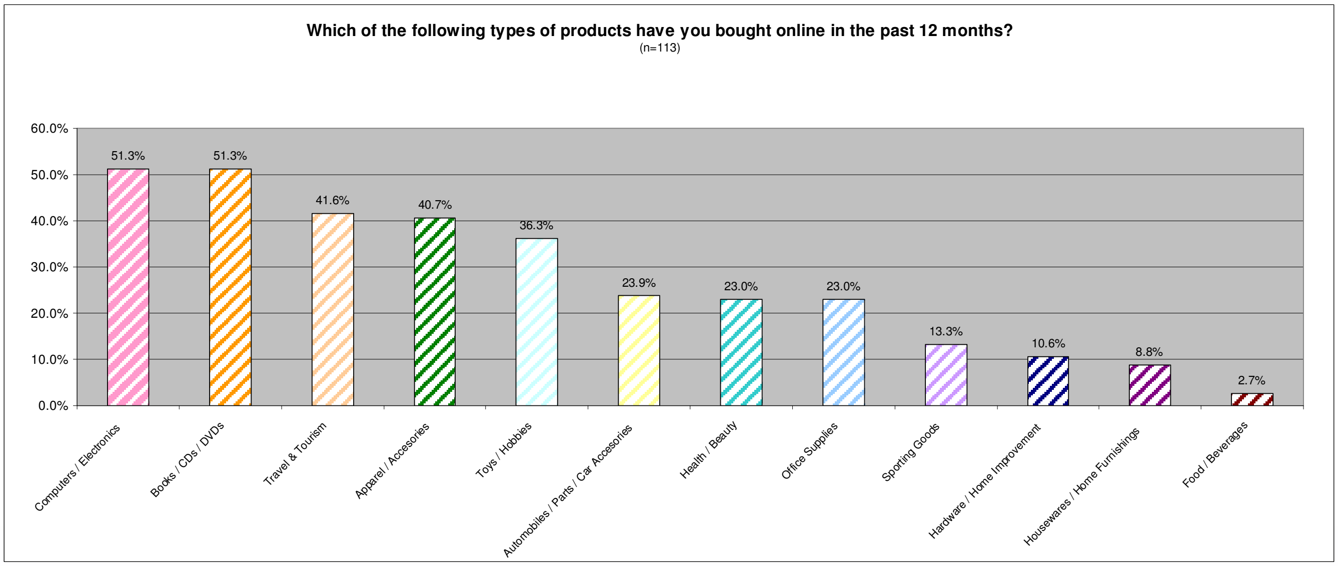
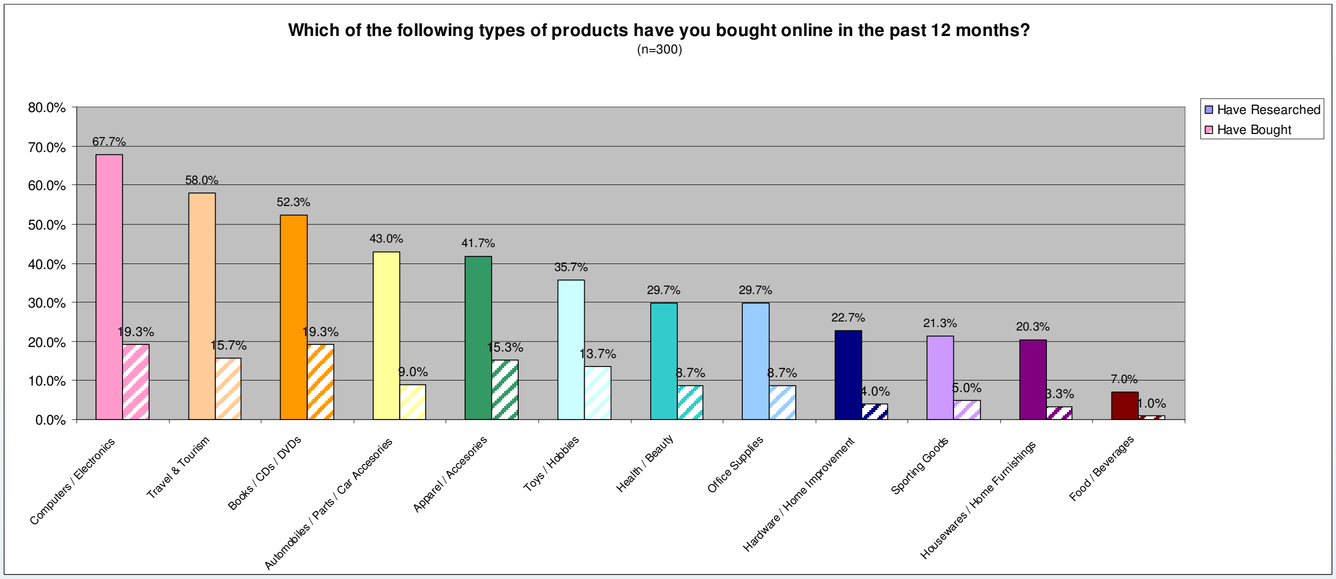
V.c. Types of Product / Services Purchased Online during the Past Year



V.d. Types of Product / Services Purchased vis-à-vis Researched Online



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V.e. Relative Proportion of Product Category Purchased when Shopped On-Line

	Bought / Researched
Toys / Hobbies	38.4%
Books / CDs / DVDs	36.9%
Apparel / Accesories	36.7%
Health / Beauty	29.3%
Office Supplies	29.3%
Computers / Electronics	28.5%
Travel & Tourism	27.1%
Sporting Goods	23.5%
Automobiles / Parts / Car Accesories	20.9%
Hardware / Home Improvement	17.6%
Housewares / Home Furnishings	16.3%
Food / Beverages	14.3%

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Across the board purchasing and research bodes well where initial purchases translate into cross-category shopping behavior. Travel as a category sems low as this was first and foremost a favored purchase by early adopters.

	Bought / Researched
Toys / Hobbies	38.4%
Books / CDs / DVDs	36.9%
Apparel / Accesories	36.7%
Health / Beauty	29.3%
Office Supplies	29.3%
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Sporting Goods	23.5%
Automobiles / Parts / Car Accesories	20.9%
Hardware / Home Improvement	17.6%
Housewares / Home Furnishings	16.3%
Food / Beverages	14.3%

It's interesting to see the behavior and % of Costa Ricans who purchase relative to research in any given category. I encourage merchants to invest on product/category cotent to bolster consumer confidence in transacting online while will certainly grow the e-commerce industry and influenced sales as a whole.

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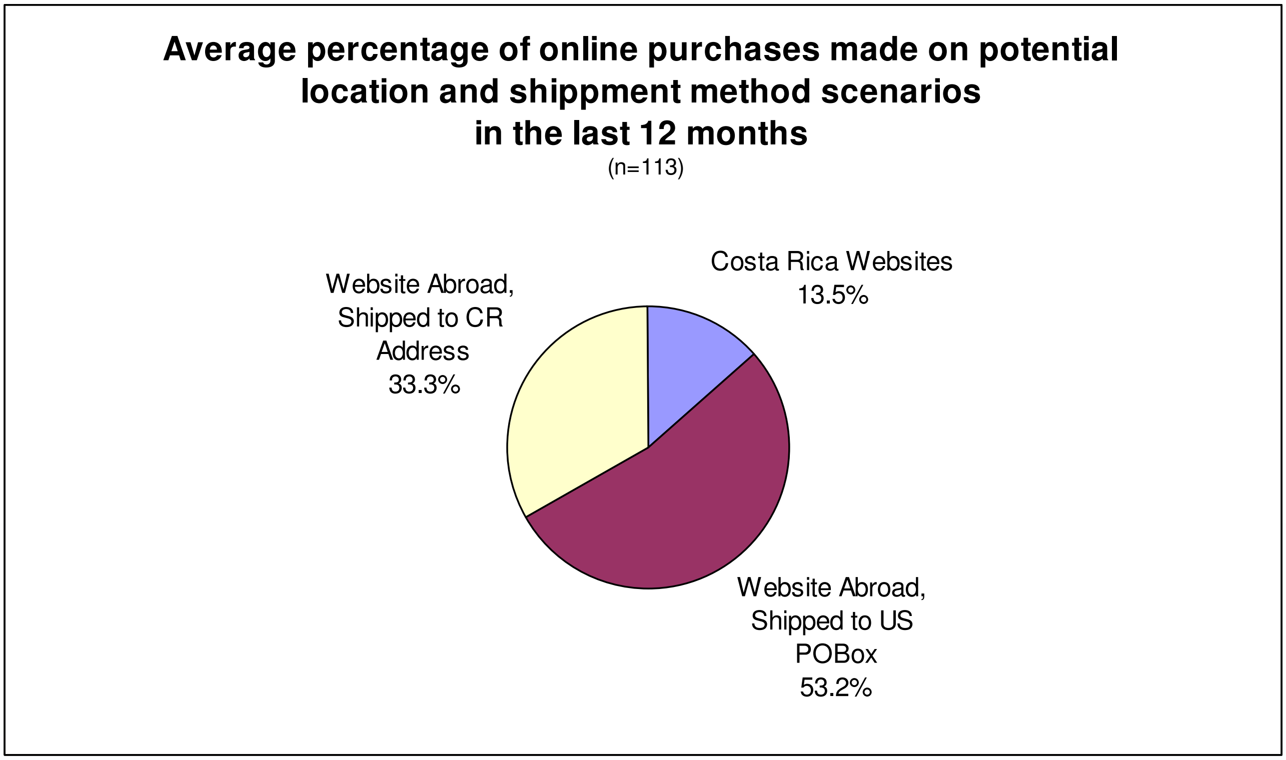
IV.f. Origin of Purchases Made in the Past Year



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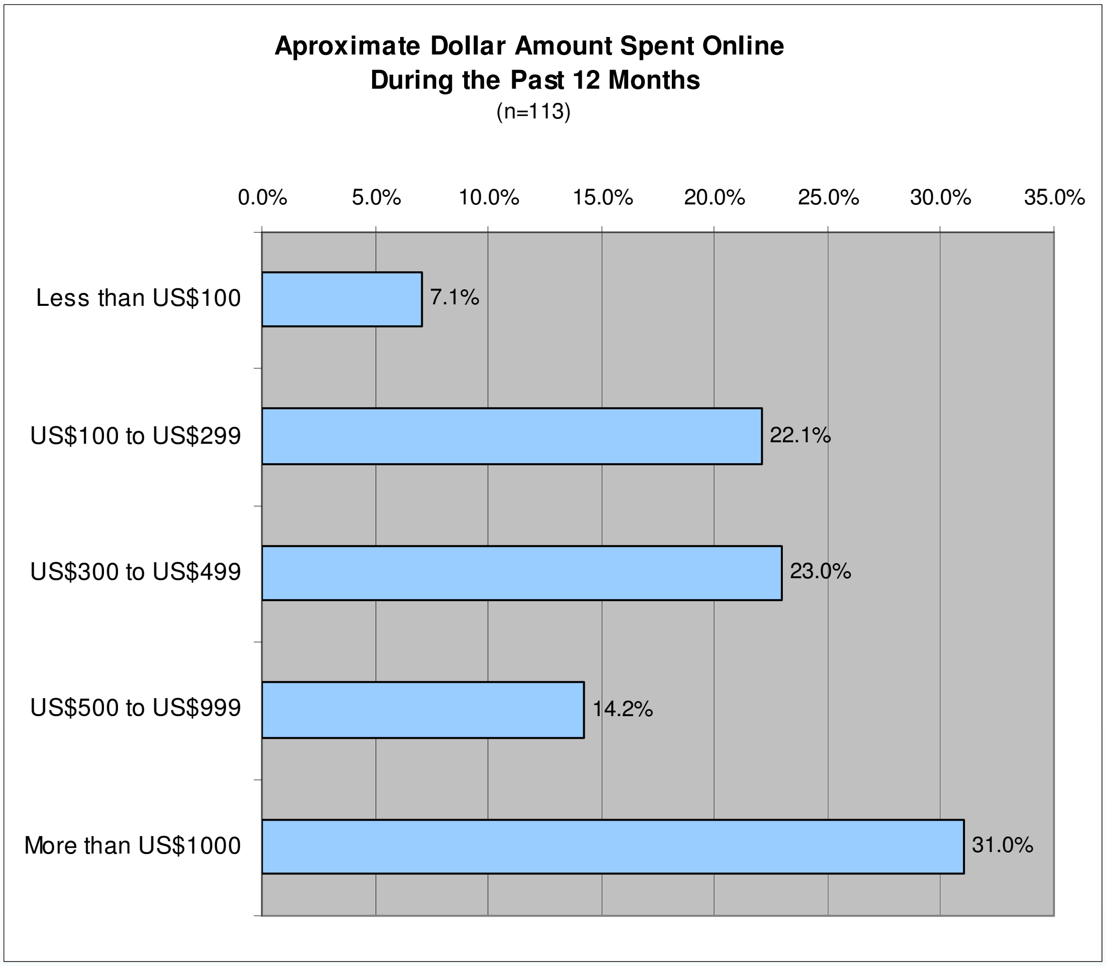
V.g. Aproximate Dollar Value of Online Purchases made during the Last Year



This is a typical split personality where shoppers purchase computers, applicance ad even travel supporting the $1000 market while the under $299 likely represents a series of smaller purchases which again supports growing interest in cross-category shopping at an array of price points.

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VI. The e-Tailing Group's Checklist

The e-tailing group's Embracing E-Commerce Checklist

Strategic

- Follow your customer as they are looking to transact online where "commerce interruptus" does not result
- Researching your products is the first indication that consumers are reaching out to you via the web
- Talk to your customers and understand further how they want to use the web through online and offline surveys
- Develop a business plan to both build and evolve your ecommerce efforts over time
- Monitor the competitive landscape to understand global ecommerce patterns and apply where relevant
- Exploit consumers' desire to visit your store to cross promote the web ultimately driving traffic online

Customer Service

- Embrace exemplary customer service techniques including toll free numbers, customer hours of operation
- Establish strong merchant guarantees to minimize consumer risk factor
- Create a destination on your site for first time shoppers to embrace newbies and their respective needs
- Highlight security and hacking trust icons visible on the site
- Encourage shoppers to share their positive stories of shopping and integrate throughout the site experience
- Privacy links should be highlighted on the home page and customer service destinations leveraging industry icons and trust symbols to allay any consumer fears

Marketing/Merchandising

- Test opportunities to grow your email house file to exploit communication opportunities
- Design a series of promotions to encourage 1st time buyers to "try" the web channel
- Develop an email strategy to foster communication that is meaningful for your shoppers, your category and your country's ecommerce marketplace
- Ensure that your product and supporting category content is robust giving customers the confidence to complete their transactions online

Industry Initiatives

- Meet with your industry peers to jointly develop initiatives that help to grow Costa Rican commerce at large
- Conduct media outreach taking a note from the US market to encourage a more positive spin regarding online shopping as well as abating any privacy and security concerns

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VII. The Research Team

About the e-tailing group, inc.

The e-tailing group, inc. serves as the multi-channel merchant's eye, bringing a merchant's sensibility to evolving the multi-channel shopping experience. A Chicago-based consultancy, they provide practical strategic perspectives and actionable merchandising solutions to merchants selling online as well as to enabling technology firms.

For more background propietary research from the e-tailing group, including a list of merchants surveyed or for additional information on the e-tailing group, inc. please contact Lauren Freedman at lf@e-tailing.com or visit the e-tailing group website www.e-tailing.com.

About Unimer Research International

Unimer Reseach International works with their clients to obtain a better understanding about their consumers, resolve problems and develop better knowledge to create succesful brands and businesses. The company's philosophy is based on market knowledge, seeking to satisfy clients both at the detailed and generic level.

For additional information on Unimer Research International please contact Mariela Jiménez at mjimenez@unimerri.com or visit the Unimer RI website www.UnimerRI.com.

About Noosphera

Noosphera's services are designed to achieve estrategic alignment between your company's electronic channel and multichannel marketing efforts, and your customer target segments' satisfaction. With our Strategic Marketing approach to electronic business and multichannel marketing, your company will find a competitive ally who supports the planning, execution, monitoring and optimization stages involved in your electronic channel investments.

For additional information on Noosphera please contact Max Sequeira at max@noospheracr.com or visit the Noosphera website www.noospheracr.com.

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