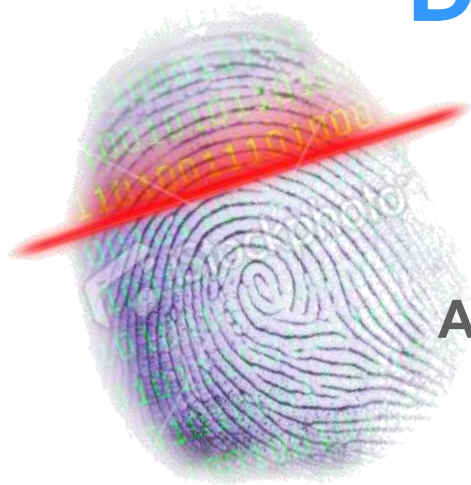


Decrypting the Online Panelist



An attempt to understand the Online Panelists' attitude and behavior based on 5 countries online study



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PASSION FOR THE NEXT

		<p>Panelists' Experience on Online</p>
<p>Involvement on Online Shopping</p>		
		<p>What we've learned</p>



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Panelists' Experience On Online

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What we've learned



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More time spent on Online than Free TV, Accelerating growth in China.

Internet Penetration



Australia



China



Japan



Korea



Thailand

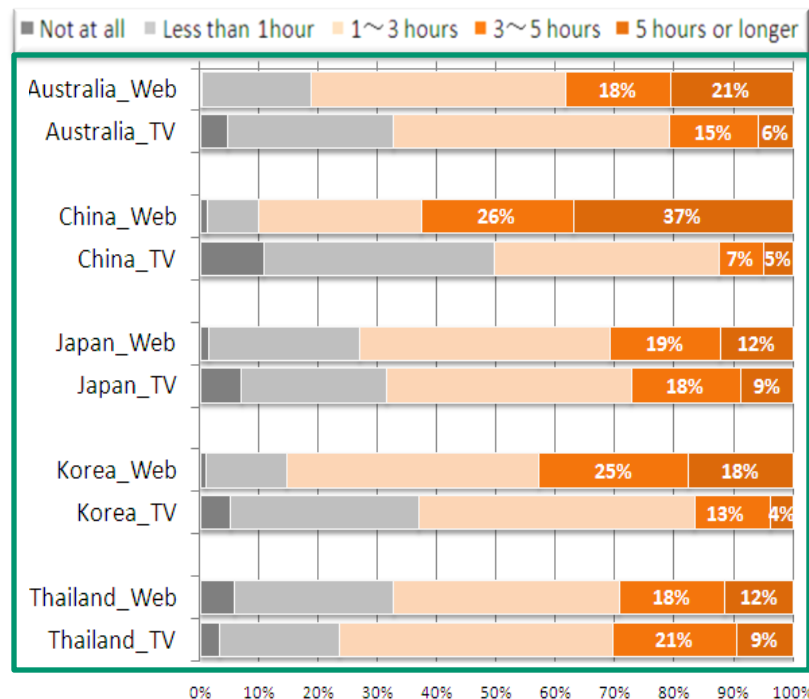
% of Internet Users in P5Y

	Australia	China	Japan	Korea	Thailand
2004	61.4	7.3	62.2	69.6	10.7
2005	63.2	8.6	66.8	71.0	15.0
2006	64.9	10.6	68.5	73.3	17.2
2007	67.9	16.1	74.1	74.7	20.0
2008	70.8	22.5	75.2	75.8	23.9

% Growth	15.3	208.2	20.9	8.9	123.4
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Source: World Bank

Time Spent on Internet vs. Free TV

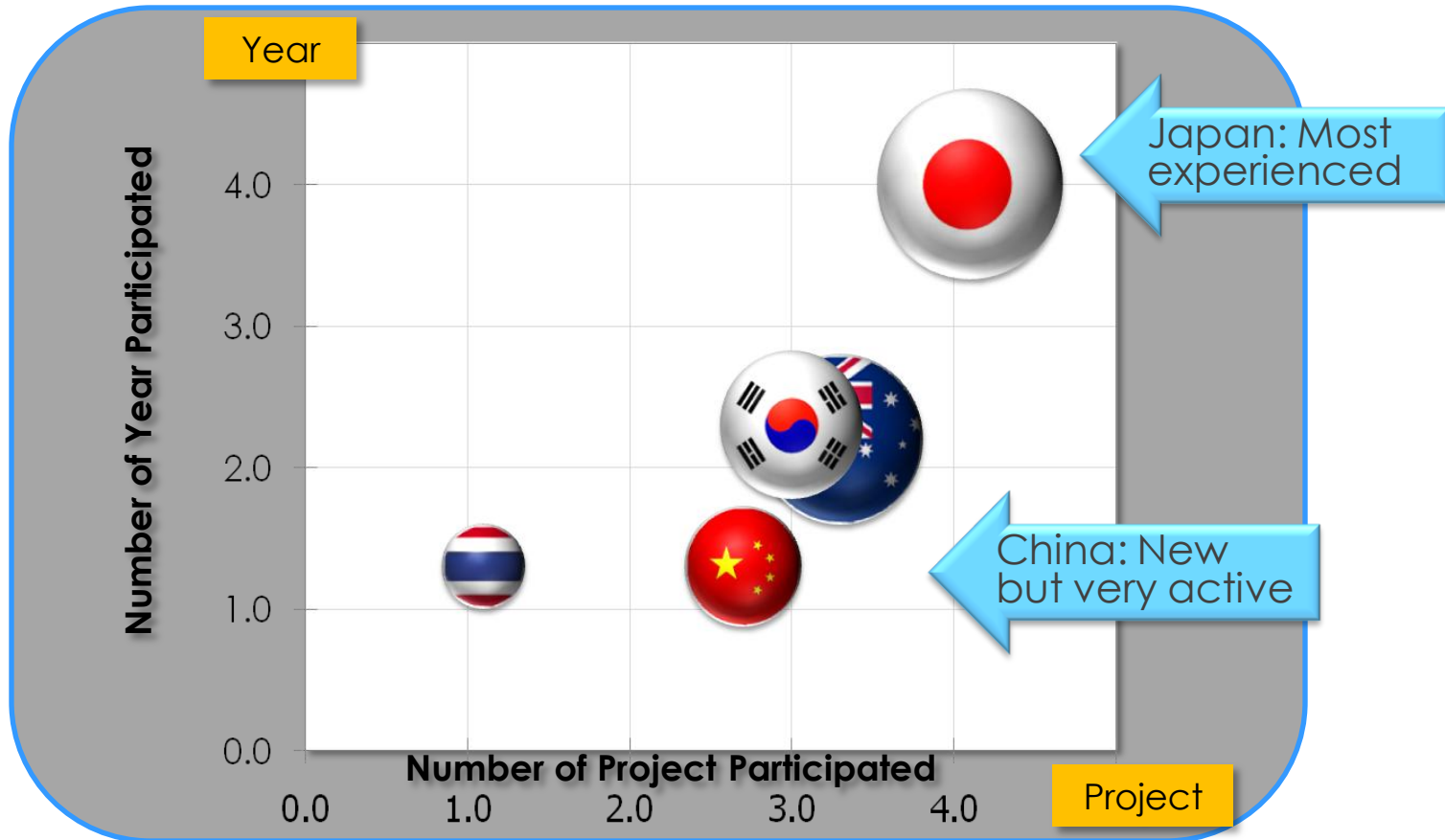


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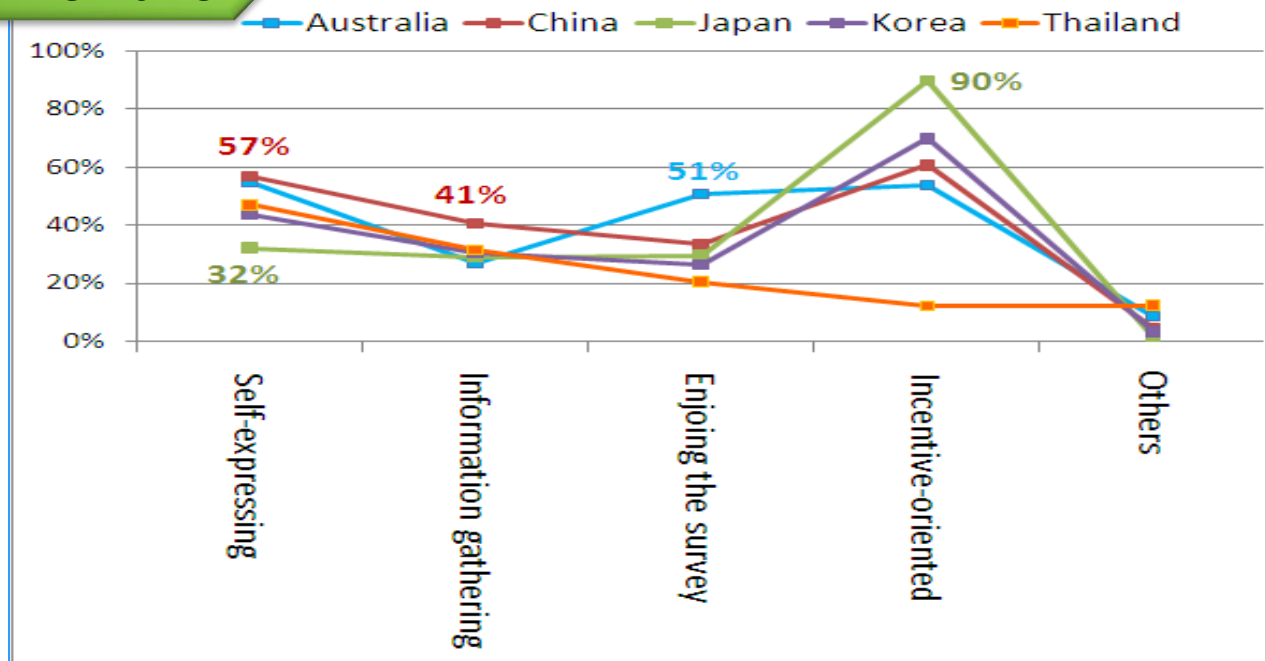
**Varied experience on online survey,
Japanese panelists are most experienced.**



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Motivation composes of tangible & intangible factors. Self-expressing works well to get people started, while tangible incentive may work better for the long run.

Motivation to Join Online Panel



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Involvement on Online Shopping



Panelists'
Experience
on Online



What we've
learned



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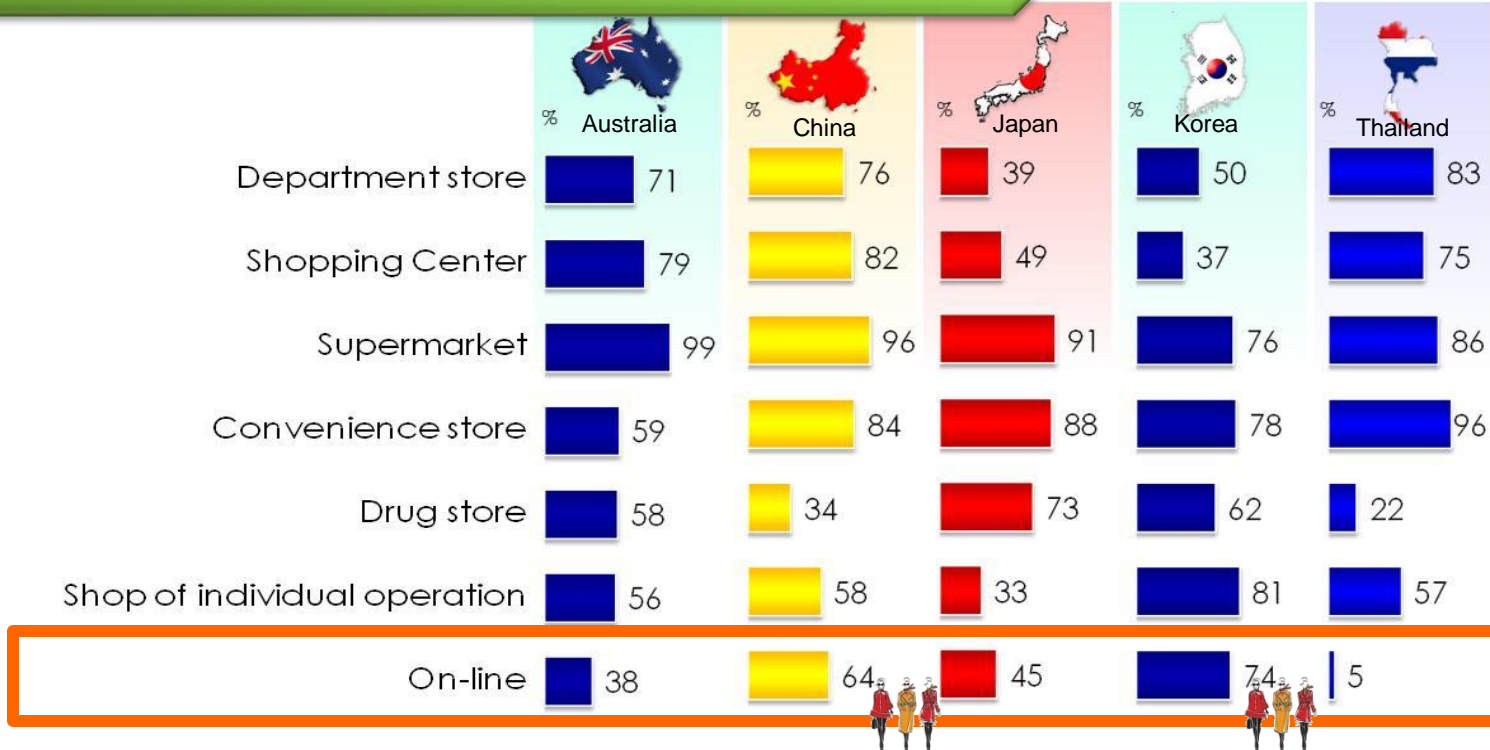


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With exception to the new face like Thais, Online Channel is getting more prominent, especially in China & Korea where fashion is the top category.

Channel of Purchase at Least Once a Month



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Convenience and Low Price are main drivers. Security and quality of products are in doubt.

Image of Online Shopping

Quality of Process

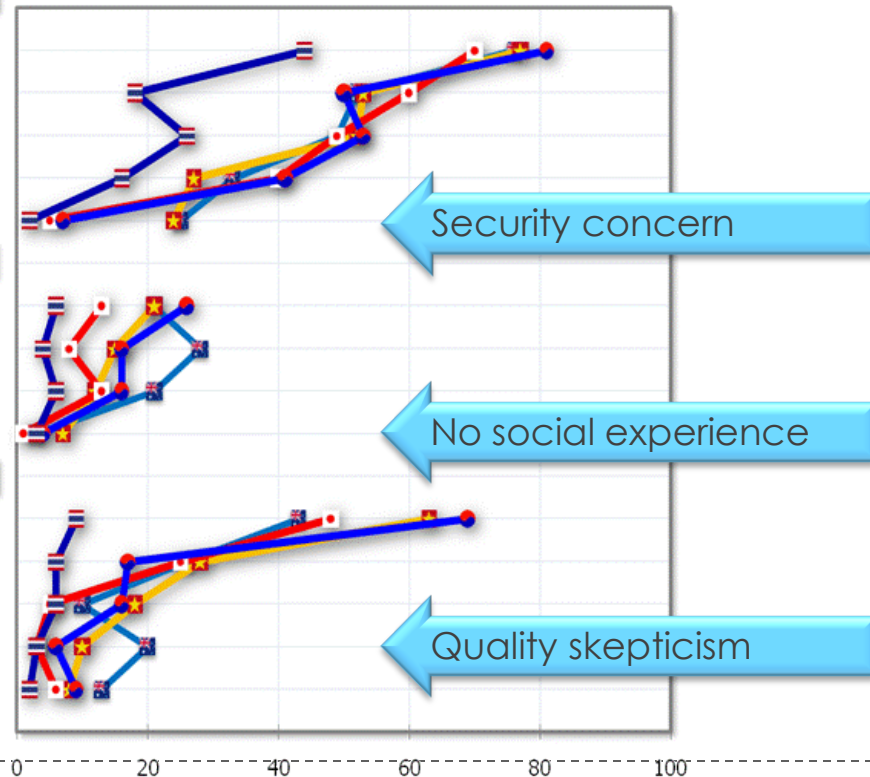
Convenient
Can shop quickly
Easy to look for what I want
Easy to get what I want
Safe

Quality of Web Design

Enjoy even without specific purchase plan
Suitable for me
Can enjoy
Can feel like connecting with people

Quality of Product / Marketing

The price is low
There are products available only on-line
Can get products currently in fashion
Good quality
Can get high satisfaction



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To foster the Online Channel, collaboration between 3 functions is essential



Quality of Web Design:

To enhance the enjoyable & engaging moment.
An ability to share/exchange views with others would make the experience become 'alive & interactive'.

Quality of Product/ Questionnaire:

To differentiate from the off-line offer and manage customers' satisfaction & retention.

Quality of Process/ Infrastructure:

To ensure the security and facilitate convenience which seems to be prerequisite for online activities.



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Are you ready for the NEXT?



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