Importance of the Internet for Consumers of Premium and Luxury Products in Mexico.

(August 2013)

Observatorio
del Mercado Premium
y de Productos de Prestigio

INTRODUCTION AND BACKGROUND

Market studies on luxury and premium goods present certain particularities that do not occur in other markets, and that add some elements of difficulty to the task. On the one hand is the very definition of what a luxury product is and what categories it includes; on the other, from the consumer perspective, it is expensive and often impossible to gain access to certain profiles of luxury consumers in order to find out about their behaviour patterns.

With regard to the first point and in terms of the categories that make up the market for luxury products, it is difficult to find a category of products that does not include luxury or premium brands. This is why the personal luxury market is limited and defined to only the categories of Fashion, Accessories, Cosmetics and Perfumes, Jewellery and Watches.

Once the market has been delimited in terms of the categories it is made up of, what remains is to establish which products within these categories are "luxury products" and which are "premium products". A "premium product" can be defined as one whose price is approximately treble the average price of a product in its category. A luxury product is of course a premium product; but most premium products are not luxury products. A luxury product is usually marketed under the umbrella of a prestigious brand and must in addition have some special characteristics:
(1) Top quality within its category, often based on a history and tradition of craftsmanship.
(2) An identifiable aesthetic, resulting from large investments in the creative departments and innovation projects.
(3) Exclusivity, both in terms of how it is purchased and how it is distributed.
(4) Internationality.
(5) A profile of consumers who are recognized opinion leaders.

However, these descriptions of "luxury products" and "premium products" do not provide an accurate enough description to enable us to discern when a product is "Luxury" or "Premium". To get around this problem and be able to measure markets, compare sales and establish trends, one of the most prestigious reports in the luxury industry, by the Fondazione Altagamma, established a definition of the luxury market which has been accepted by the industry since the mid-1990s: the luxury market is defined as one formed by a group of approximately 300 specific personal luxury brands of all nationalities, whose sales are analysed annually.

The arrival at a definition of the luxury market through a list of brands is perfectly adequate for being able to quantify the market through the sales figures of each of the companies, but is impractical for performing consumer research. It is for this reason that a price-based identification has been chosen in this study to define what a luxury product, premium product or a standard product is. The Personal Luxury Products market is defined as that which consists of items of fashion, accessories, cosmetics and perfumes, watches and jewellery whose retail price exceeds certain established standards.

This definition enables us to identify products that belong to the Personal Luxury market and distinguish them from "Premium" products, whose price is significantly above the average price of the products in its category, but does not reach the level agreed upon to be considered a luxury product.

Regarding the second difficulty mentioned (access to the luxury goods consumer for the purposes of carrying out market research), it is relatively simple to obtain information from "aspirational" consumers, who make sporadic purchases of luxury goods, but very hard to obtain quantitative data for consumers with higher incomes and net worth, for whom the purchase of luxury goods is simply part of their way of life.

This report focuses on people who have incorporated new technologies into their lifestyle and who show an interest in luxury and premium products. These are people who devote a portion of their free time to informing themselves about trends and new developments, and are therefore current or potential consumers of luxury and premium products.

EXECUTIVE SUMMARY.

The main conclusions drawn from this study are:

1. **In general, the buyer of luxury products in Mexico likes to shop in boutiques or department stores, and views the Internet mainly as a useful tool for gathering information.** 90% of buyers of luxury goods consider that shopping in luxury boutiques is a rewarding experience, followed by 77% who feel the same way towards shopping in department stores. 90% like to touch and see the product before they buy it, and three out of four people who buy luxury goods admit that they do some research on the Internet before making the purchase in the shop.

2. In terms of product categories, **78%** of luxury buyers have purchased a **Cosmetic** brand in the last 3 months, followed by **44%** who have bought a **Fashion** brand and **34%** who have bought something in the **Accessories** category. The **Watches** and **Jewellery** categories show low uptakes, 9% and 6% respectively. The higher percentage in the purchase of cosmetics is due to a lower spend value for this type of product as well as the life cycle of the product, which is more frequently purchased than products in the rest of the categories.

3. **Magazine websites are considered by buyers of luxury goods to be the best way to find out about new trends, products and collections, and thereby to help make a decision on what to buy.** Along with magazine websites, **articles in print magazines and brand websites** are the most widely accepted sources of information by buyers of luxury products when they purchase a product, and fulfil the role of "official opinion leaders" or “consumer motivators”. They are only surpassed by previous experience in the use of luxury products and the information obtained by visiting stores. It is noteworthy that regarding the latter, the information is generally obtained by customers themselves and not from the advice or information from the staff in the store, which nearly half of luxury buyers considered of little importance.

4. **One in six people who buy luxury goods have bought some of them on the Internet.** The main advantages of online shopping were said to be convenience and unavailability of the product in the country or in the store. These advantages are offset by certain risk considerations: lack of trust in local delivery services (mentioned by 41% of people who buy luxury) and Internet security (mentioned by 33%). How quickly the Internet becomes more widely used as a channel for buying will depend on the solutions to the perceptions of risk that significant percentages of consumers of luxury goods currently have.
   The trend is heading more and more towards purchases of luxury goods being made over the Internet. If purchases of premium goods and standard products are considered in addition to those of luxury goods, the percentage of people who buy luxury and that have made some of these purchases over the Internet is one in three. As these people begin to have good experiences when they buy

over the Internet, they will become more willing to increase the value of the purchases they make.

5. **The importance of the Internet as an information channel is reflected in the fact that 78% of people who buy luxury regularly visit** (more than once a week) **websites related to luxury products.** However, not all websites are visited for the same purpose. Magazine websites and, secondly, brand websites are the sites chosen to find out about new collections, trends or brands. Brand websites are also the websites chosen for shopping, and forums and blogs are considered suitable for expressing opinions.

6. **Luxury buyers consider a website "good" depending on the prestige of the brands advertised in it, on the way that brands are presented, as well as the design of the pages themselves**. Reviews by other users on the web page or the references that the site gets on social networks are of minor importance when evaluating how good a website is.

7. **Apple**, and therefore its iOS operating system, **is by far the most widely used brand for accessing information or purchasing luxury goods over the Internet**. As for the devices used, laptops are used by 55% of luxury buyers, followed by tablets and smartphones with a 44% and 37% use respectively. Access to information or the purchase of luxury products is done primarily through search engines such as Google (77% of luxury buyers); in second position are the links on newsletters received by e-mail, which 30% of people who buy luxury say they use to access luxury or premium product websites.

OBJECTIVE AND METHODOLOGY

The aim of this study was twofold:

- Firstly, to **discover the purchasing behaviour patterns of consumers** in the personal luxury products market, and the importance that the different media play in their decisions.

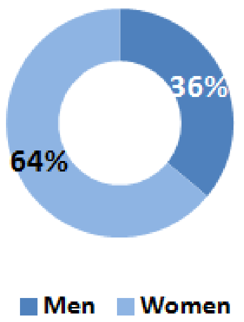
- And secondly, **to quantify how widespread the use of the Internet has become** as a medium for information and for shopping in this market.

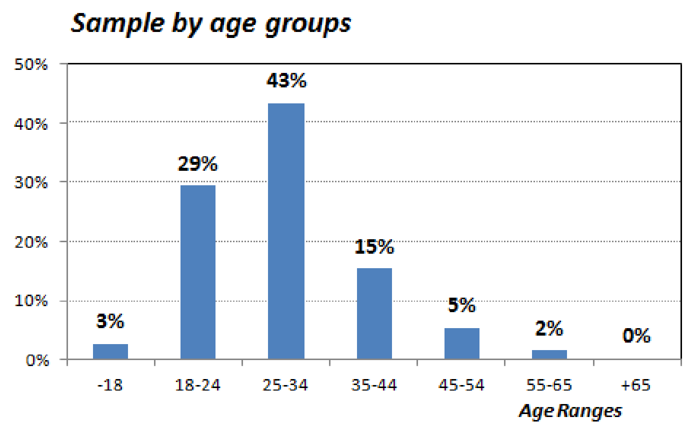
In the study, the purchase of luxury products and the purchase of premium and standard goods were differentiated through established price levels in each of the categories.

Unit Retail Price	Luxury Products	Premium Products
Fashion	Over MX$ 13,000.	Between MX$ 4,500 and 13,000.
Accessories	Over MX$ 8,000.	Between MX$ 3,500 and 8,000.
Cosmetics	Over MX$ 1,700.	Between MX$ 450 and 1,700.
Watches	Over MX$ 60,000.	Between MX$ 8,500 and 60,000.
Jewellery	Over MX$ 26,000.	Between MX$ 2,000 and 26,000.

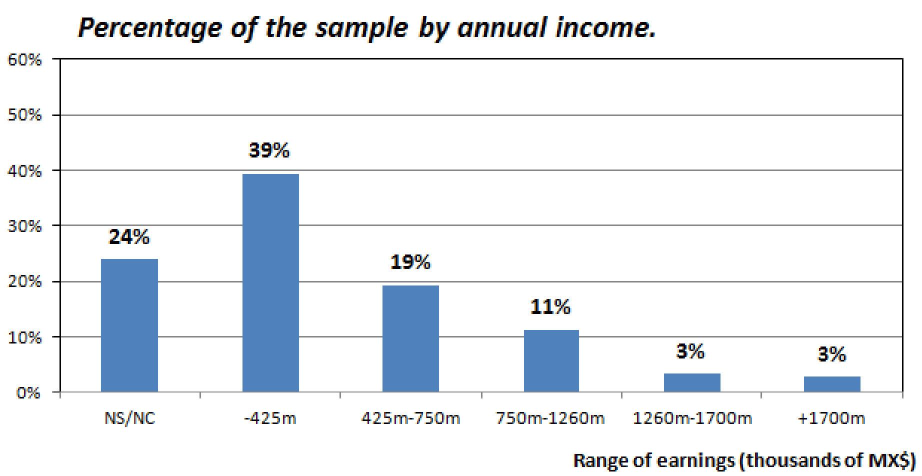
The study was conducted through online questionnaires in June and July 2013. Participants were recruited online ("opt-in" invitations, mentions on social media, newsletter). These interviewee recruitment campaigns were conducted very effectively by Condé Nast Mexico, publisher of Vogue, GQ, CN Traveller and AD, through their databases and the social networks of their magazines. This cooperation with Condé Nast Mexico not only provided online access to a large number of people, but also provided a profile of people that was in line with the target audience sought: people who have incorporated new technologies into their lifestyle and show an interest in luxury and premium goods.

The result was a total of 567 completed questionnaires. 64% of the sample were women and 36% were men. In terms of age, 32% were under 24 years old, 43% were between 25 and 34 and 25% were over 35.





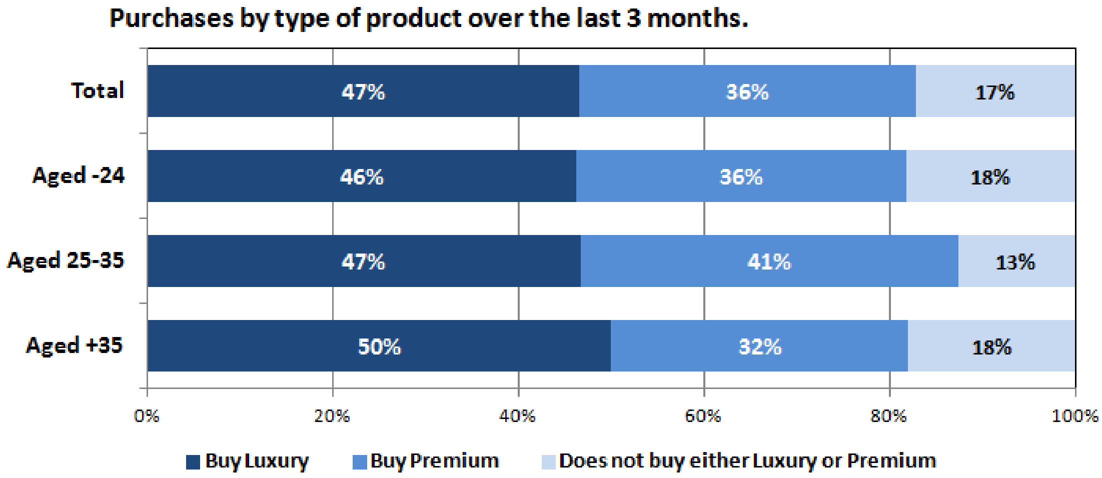
In terms of annual income, 17% of the sample had an annual income higher than MX$ 750,000, and 59% of the sample reported an annual income below MX$ 750,000. The remaining 24% did not answer the question.

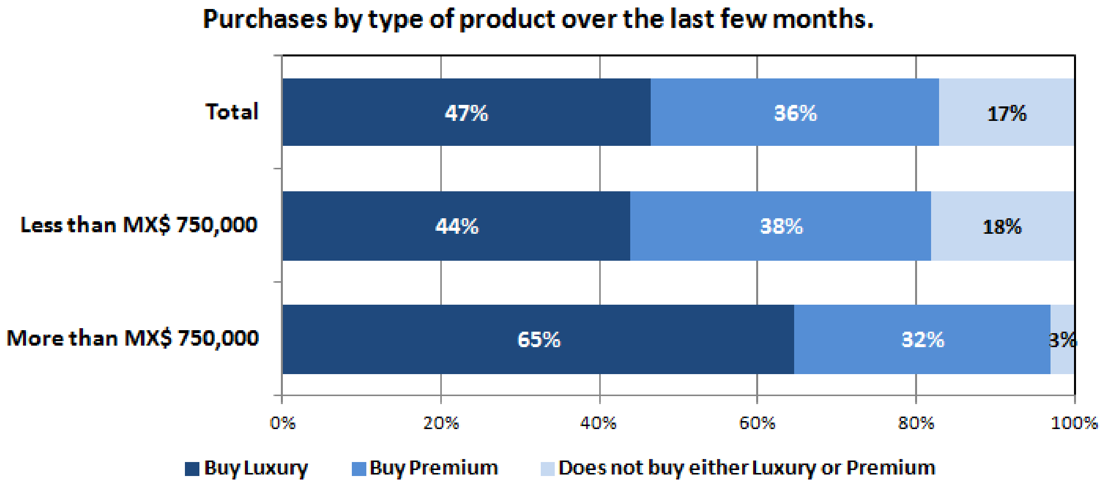


PURCHASE OF LUXURY GOODS

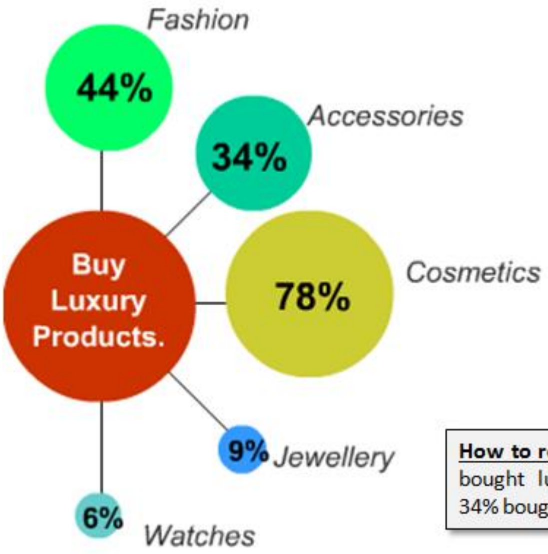
A total of **47% of the respondents claimed to have acquired a personal luxury product over the past 3 months.** Of the group of people who have purchased a luxury product in the last three months – called BL (Buy Luxury) hereafter – the vast majority (72%) also bought premium products.

The importance of the BL group displays similar levels for the different age ranges, but increases to 65% in the case of people with incomes above MX$ 750,000.





Cosmetics is the category displaying the highest percentage of purchase in the PL group; **78% of people who bought luxury purchased a cosmetics product**, while 44% purchased a fashion product, and 34% a product in the accessories category. The categories of jewellery & watches showed marginal rates of purchase, at 9% and 6% respectively.



How to read this: 44% of the people who bought luxury products bought fashion; 34% bought accessories, etc.

For the purchase of premium products, the significance of each of the categories has a hierarchy which is qualitatively similar to that of luxury goods. It is worth noting that the percentage of jewellery purchases passes from only 9% in luxury products to 16% in premium products. Meanwhile, watches continue to show a very low purchase rate of 6%.

How to read this: 51% of the people who did not buy luxury products but did buy premium products, bought fashion; 35% bought accessories, etc.

The higher purchase percentage for cosmetics is due in part to a lower absolute spend value on luxury cosmetic products compared to the other categories, so that, despite having a higher price than standard cosmetic products, they are more affordable for a greater number of consumers than other luxury items. Moreover, the life cycle of such products means that they are purchased more frequently than products from other categories such as fashion, jewellery or watches.

PURCHASING BEHAVIOUR.

People who buy luxury **generally prefer to purchase these products in specialist shops or in department stores** rather than buying online.

The following table shows the score given from 1 (strongly disagree) to 5 (strongly agree) to various assertions by the total number of people who bought luxury, for the different age ranges of this group, and for the group who acquired premium products.

Attitude and Behaviour in the Shopping Process.

It is significant that:

- **90% of people who buy luxury** and 87% of people who purchase premium products **agree or strongly agree with the statement "I like to see and touch the product."** This is the most highly valued characteristic by respondents.

- The purchase of luxury products in **boutiques or department stores is considered a rewarding experience** both for buyers of luxury products and for those who buy premium products. Shopping in boutiques is considered as a rewarding experience for 90% of luxury buyers, compared to 77% who consider shopping in department stores a rewarding experience.

- **The Internet mainly fulfils an informational function,** used for consultation before making a purchase in a store:

    - ✓ 80% of luxury buyers believe that the Internet provides a lot of information.

    - ✓ 74% agree with the statement "I find out information on the Internet and I buy in a shop".

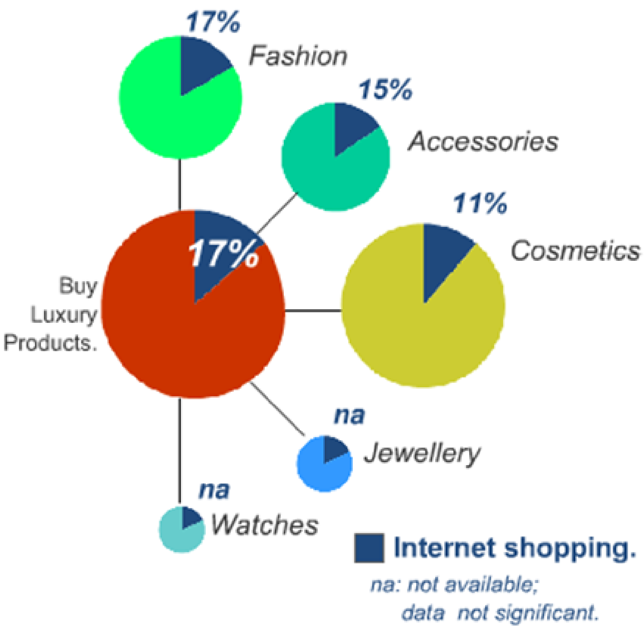
    - ✓ However, "the Internet is a good way to shop" only comes out 12th in importance.

- Although shopping in boutiques or department stores is considered a rewarding experience, **only 25% of luxury buyers think that advice from staff** in stores is important.

THE PURCHASE OF LUXURY PRODUCTS ONLINE

One in six people (17%) **who bought luxury in the last three months bought one of their purchases of luxury products over the Internet**.

The importance of internet shopping shows no significant differences between the different product categories.



How to read this: 17% of the people who bought luxury fashion products bought some of these purchases online; 15% of the people who bought luxury accessories bought some of these purchases online, etc.

Significantly, although the total market for internet transactions in Mexico is over 60% lower than the market in Spain, the percentage of people who buy luxury and make some of these purchases online in Mexico is only 30% lower than in Spain.

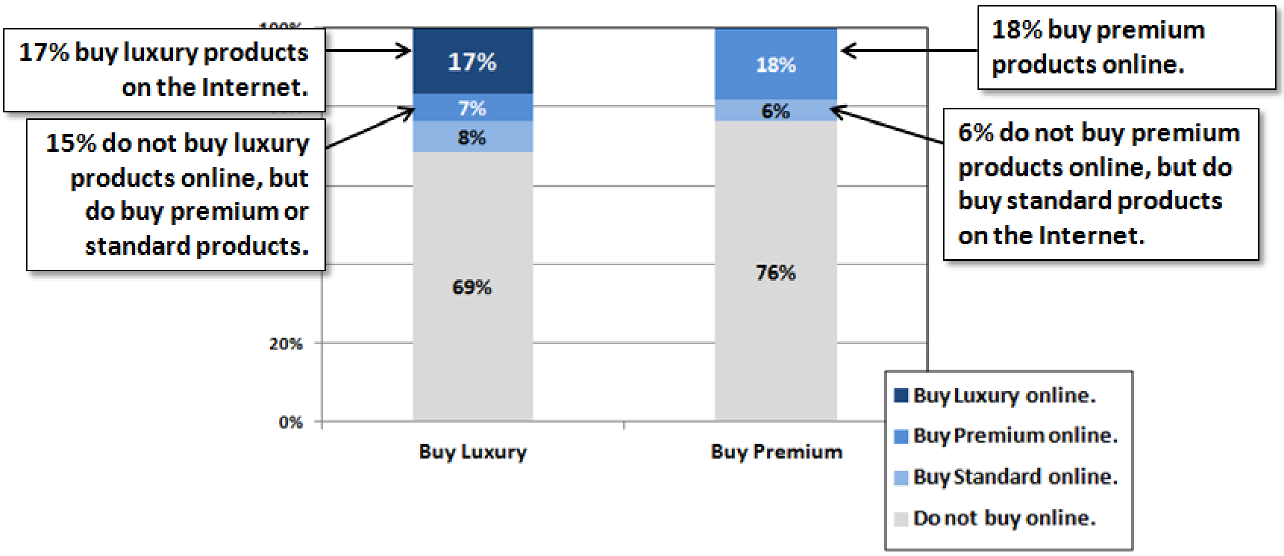
Although the Internet is currently regarded as a means to be informed more than a shopping channel, significant growth is expected in the coming years as solutions are found to safety issues and risks in the shipment of products. "I do not trust local delivery services" and "I do not trust internet security" are the 3rd and 4th most important reasons for making a purchase of a luxury product in the store instead of online.

	Mexico	Spain
Total transactions over the internet	USD **8** billion(*)	USD **21.6** billion (*)
Annual growth 2012	**+29%**(*)	**+16%**(*)
No. Of Buyers	8.4 million (*) **7.5% of the population**	15,9 million (*) **34% of the population**
Expenditure per Buyer	**USD 952** (*)	**USD 1350** (*)
% of people who buy luxury and buy some of it online	**17%.**	**24%.**

(*) **Source: eMarketer June 2013**

Shopping for products over the Internet is an activity that is starting to display some interesting figures. It is important to note that up to 32% of people from the luxury group made an online purchase of either a luxury, a premium or a standard product in the category concerned. This means that 15% of people buy luxury and do not purchase personal luxury goods online, yet use the Internet to buy premium and/or standard products. It is hoped that this group will progressively join the segment buying luxury products online.

Purchases online.



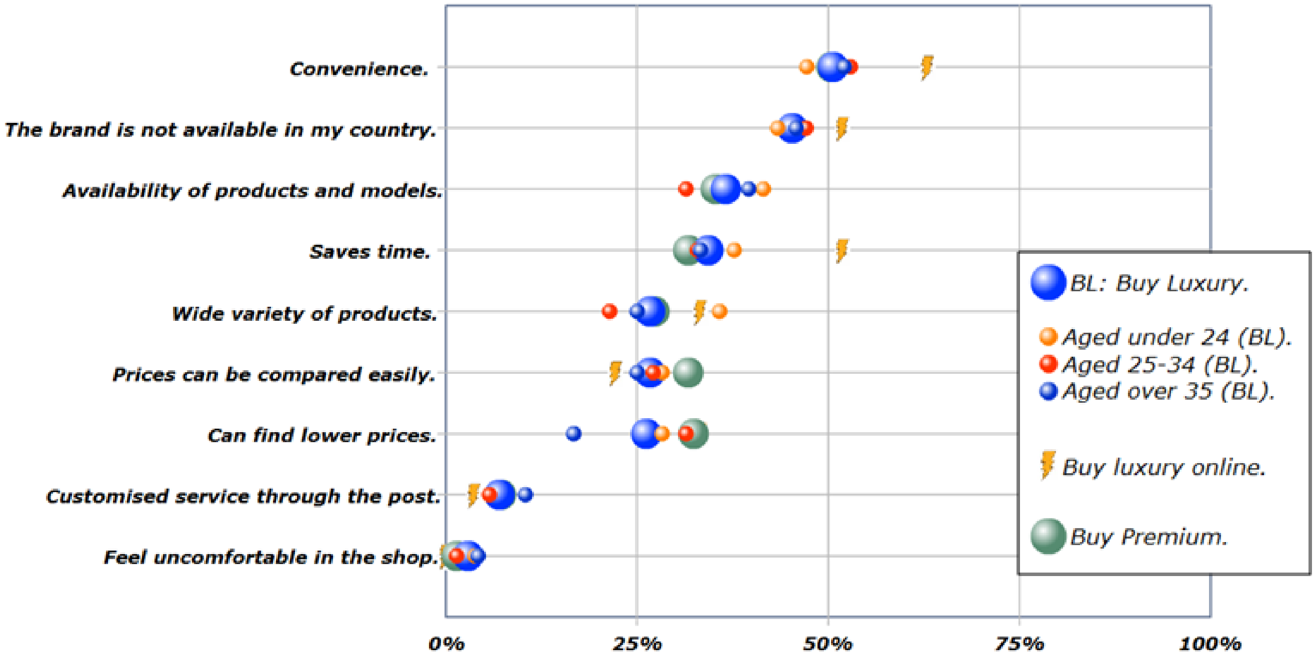
REASONS FOR BUYING OVER THE INTERNET AND BUYING IN SHOPS.

"Convenience" and "Availability of Brands" are the main reasons for buying over the Internet, mentioned by 51% and 45% respectively of the people who buy luxury. Among the group who already buy online, "Saves Time" appears as a major benefit, cited by 52% of this group.

"Lower Prices" does not appear among the main reasons for purchasing online (26% mention it), although its score increases among buyers of premium products (32%). This is in line with the conclusions of Fondazione Altagamma's report on the luxury industry, which notes that up to 68% of online purchases are made without any discount applied.

The following table shows the percentage of people who chose the following reasons for making a purchase online. It shows the percentage of the total of people who purchased luxury, of the different age ranges in this group, of the group who bought premium products, and the group who purchases luxury goods online.

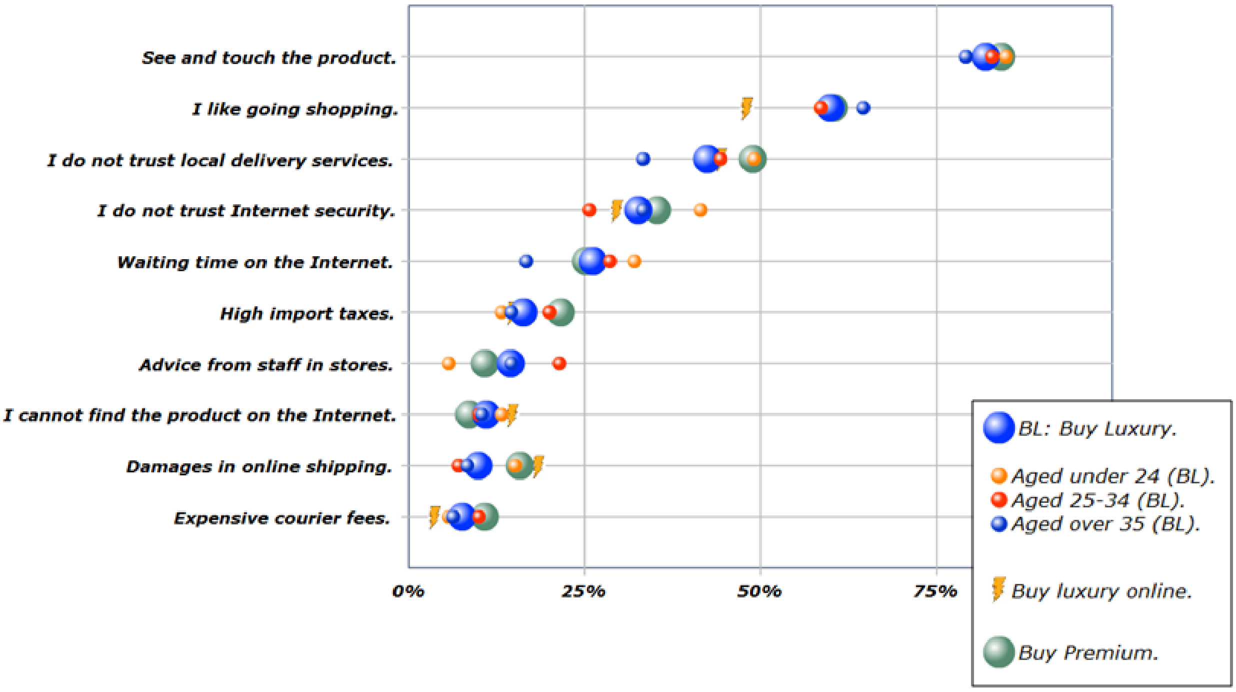
Reasons to buy over the Internet (% of responses).



The two main reasons for buying a luxury product in a shop instead of over the Internet have to do with the rewarding experience of shopping in stores: "**I like to see and touch the product"** (cited by 82% of those who buy luxury) and **"I like going shopping**" (mentioned by 60% of this group).

The following table shows the percentage of people who chose the following reasons to make a purchase in a shop instead of over the Internet. It shows the percentage of the total of people who purchased luxury, of the different age ranges in this group, of the group who bought premium products, and the group who purchases luxury goods online.

Reasons to buy in shops (% of responses).



The next two most important reasons for buying in stores relate to the perception of risk associated with buying over the Internet: "**I do not trust local delivery services**" and "**I do not trust Internet security**".

Notably, "**Shop Staff's Advice**" appears in 7th place, only mentioned by 14% of luxury buyers.

VISITS AND POSITIONING OF WEBSITES RELATED TO LUXURY PRODUCTS.

78% of people who buy luxury regularly visit (once or more per week) **websites related to luxury products.**

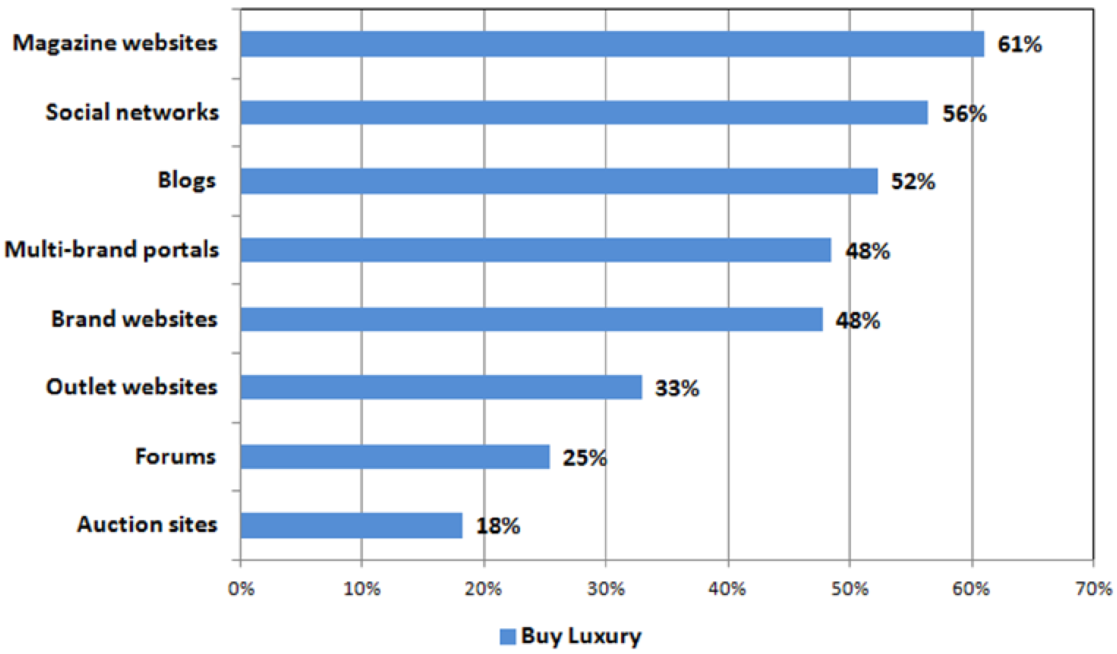
This percentage rises to 93% among those who also shop for these products online.

In this section, respondents were asked to indicate the frequency and purpose of their visits to the following websites:

- Luxury or premium brand websites, i.e. the official web pages of the different brands (e.g. www.loewe.com, www.burberry.com etc.).
- Online versions of magazines in the luxury or premium market (e.g. www.vogue.com.mx, www.gq.com.mx etc.).
- Luxury and premium product blogs (e.g. www.thesartorialist.com, www.embelezzia.com etc.).
- Social networks for luxury and premium goods.
- Multi-brand portals for buying luxury or premium goods (e.g. www.net-a-porter.com)
- Outlet websites for buying luxury or premium goods (e.g. www.privalia.com, www.buyvip.com).
- Auction sites for premium and luxury goods.
- Forums specialised in premium and luxury products.

The results concerning frequency of visit are:

Percentage of people who regularly visit luxury product websites.



The sites most usually visited by people who buy luxury are those corresponding to **Online Magazines** (visited by 61% of people in this group), **Social Networks** (visited by 56%) and **Blogs** (visited by 52%).

To the question of what each type of website was considered as most appropriate for, the results of responses are shown in the following table. One can see the percentage of people in the luxury group that considered which of the different websites was the most suitable for each purpose. The table only shows percentages above 20%.

% of interviewees who believe the site is appropriate for...	Brand websites	Online magazines	Blogs	Social networks	Multi-brand Purchase portals
Discovering new collections	45%	26%			
Finding out prices	56%				
Looking for deals	23%				33%
Info on the product	55%				
Buying	58%				21%
Info about shops	59%				
Finding out the latest trends		44%			
Expressing opinions			23%	35%	
Discovering new brands		38%	20%		

(Only percentages above 20% have been included)

- **Brand Websites and Online Magazines** were considered to be the most suitable sites for finding out about new developments in the market and latest trends. Both types of websites play the role of "official consumer motivators" when it comes to knowing what is important in the luxury and premium goods market. This role is clearly evident when analysing the importance given to information received through different information channels (see later on).

- **Brand and Multi-brand Websites** are the favourite places for shopping. It is interesting to note the better positioning of brand websites for making a purchase (58% of people who buy luxury believe it is the most suitable medium), compared to multi-brand portals (only 21%) even though multi-brand portals are the most preferred channel for looking for deals.

- **Blogs** and **Social Networks** are mainly considered appropriate for expressing opinions. However, they are positioned otherwise among people aged under 35, for whom these sites have grown in importance as places where the latest trends can be discovered and one can find out about new developments. Blogs are consulted much more commonly among people aged between 25 and 34 (53% of this segment usually follow blogs), while social networks are most popular among the under 24 age group (70% of them regularly use them).

CRITERIA FOR BEING CONSIDERED AS A GOOD WEBSITE.

The main criteria for a website related to luxury products to be considered as good are:

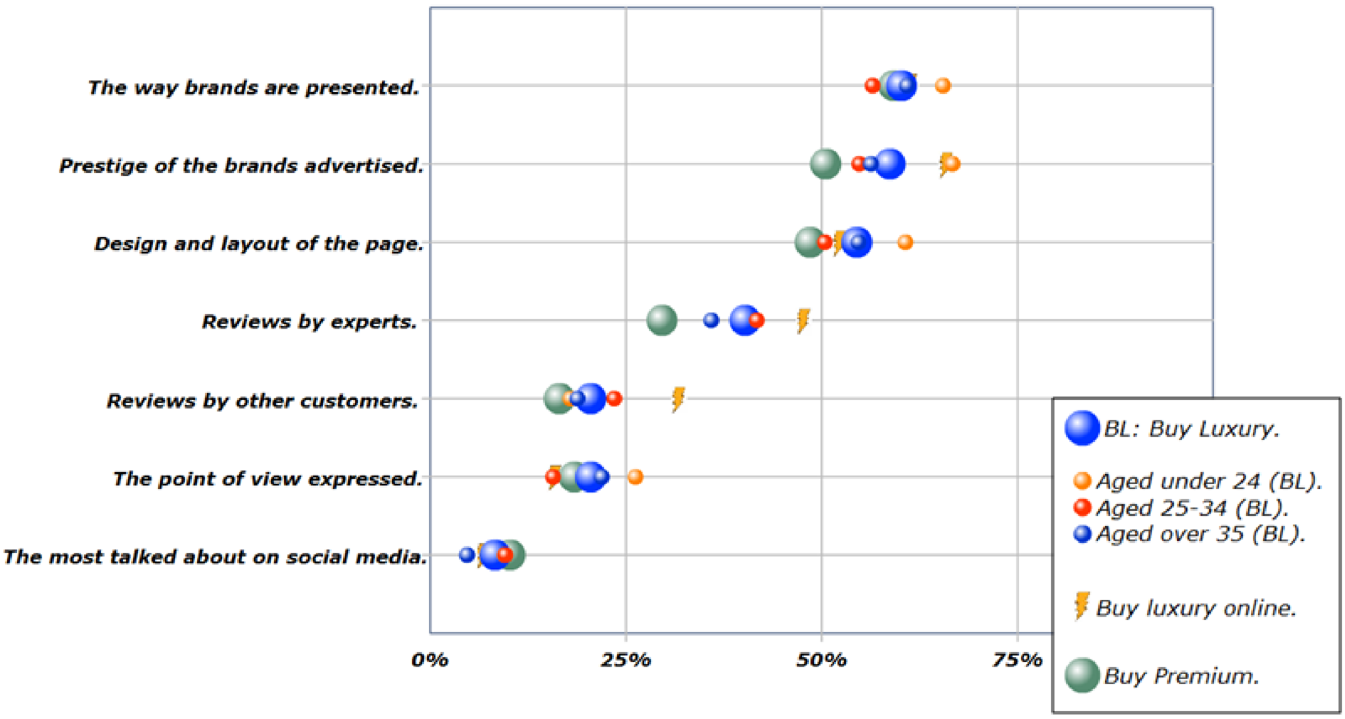
- **"The prestige of the brands that advertise"**, together with the **"Way the brands are presented"**. Both aspects are considered important by 60% of people who buy luxury. However, the first one, "prestige of the brands that advertise" is given a better score by people who have also bought luxury goods on the Internet (65%).

- In third place, "**page layout**" is mentioned by 54% of people who buy luxury.

References to the web page on social networks, reviews by other users and opinions expressed on the websites seem not to be very important when qualifying how "good" the website is. These aspects are mentioned by less than 25% of people who buy luxury.

The following table shows the percentage of people who chose the following reasons as important in considering a website good. It shows the percentage of the total of people who purchased luxury, of the different age ranges in this group, of the group who bought premium products, and the group who purchases luxury goods online.

Criteria for being considered as a good website (% of responses).



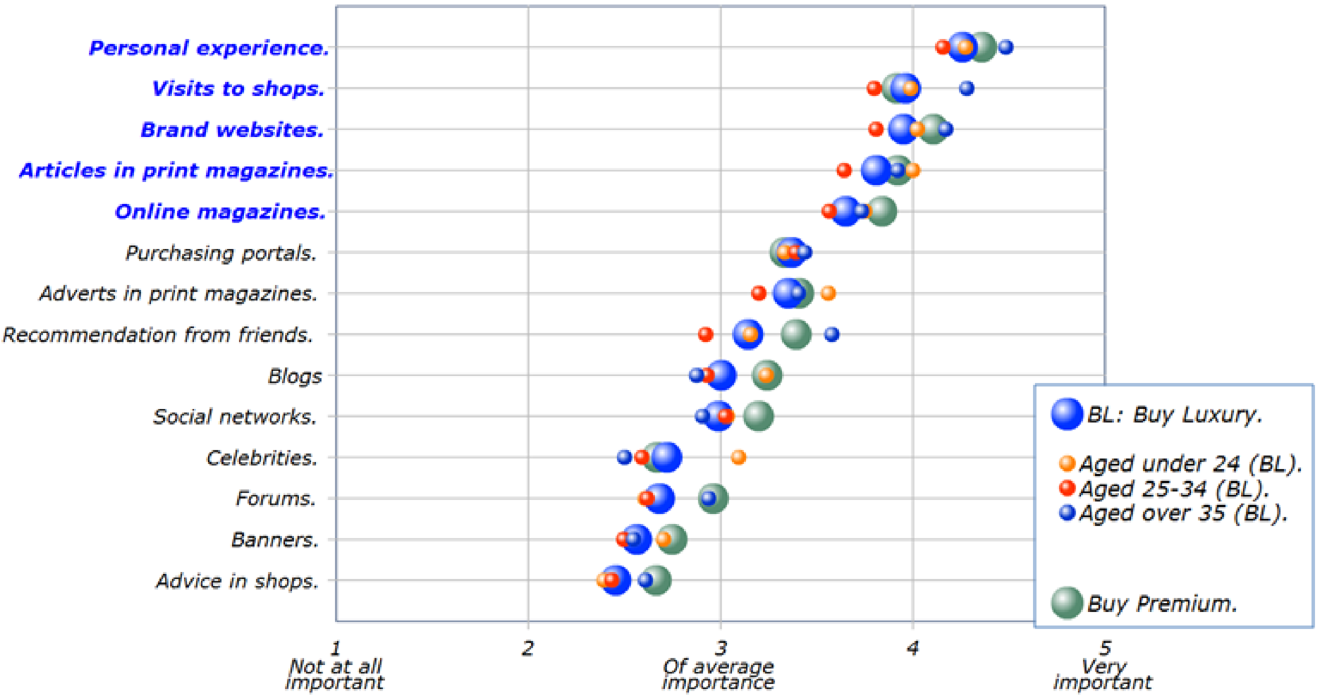
INFLUENCE OF INFORMATION MEDIA IN THE PURCHASE OF LUXURY GOODS.

The information sources with the highest level of credibility are:

- "**Personal Experience**" and "**Visits to Shops**", cited as very important or important by 89% and 84% respectively of the people who buy luxury.
- As external information sources, two types of websites are mentioned: **brand websites** (82% of luxury buyers cite it as important or very important) and **magazine websites** (76%), along with **articles in print magazines** (80%).

The following table shows the percentage of people who consider each of the sources of information on buying a luxury product as important. It shows the percentage of the total of people who purchased luxury, of the different age ranges in this group and the group who bought premium products.

The importance of information sources.



It is significant that:

1. Information channels related to **"official consumer motivators" of luxury** (brand websites, articles in printed magazines, online magazines) show an **above average** score in terms of importance of information.

2. **"Advice in shops" does not appear as a source of information that is valued by the consumer**; almost half of the people who buy luxury regard it as irrelevant or of little importance.

3. The hierarchy of importance of the information of each of the media **is maintained for the different age groups,** although Blogs and Celebrities are more important for younger age groups, and recommendations from friends are more important for people over 35.

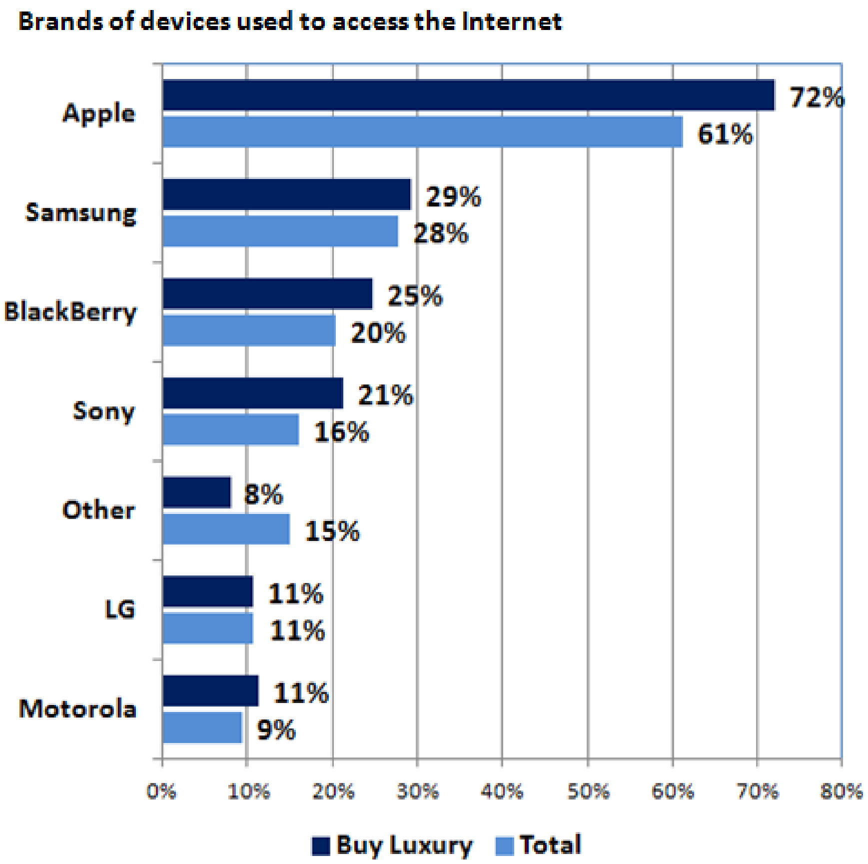
The figures given in this section, along with the results on the frequency of visits to luxury product websites, indicate that **magazine websites are the ideal vehicle for discovering trends, new developments and new collections,** and the luxury goods consumer visits them regularly. It is from here that he or she gets **information on which products to buy next**.

Once the decision to buy has been made, it is by looking at **brand websites and visiting shops** that more detailed information about the product to be bought can be found: prices, deals, models available, addresses of shops etc.

DEVICES USED TO ACCESS THE INTERNET.

The luxury buying group have an average of 3.6 devices to access the Internet, 30% more than the group that does not buy luxury.

The Apple brand is by far the most pervasive device: 72% of people who buy luxury have an Apple device, 61% of the total of the sample.



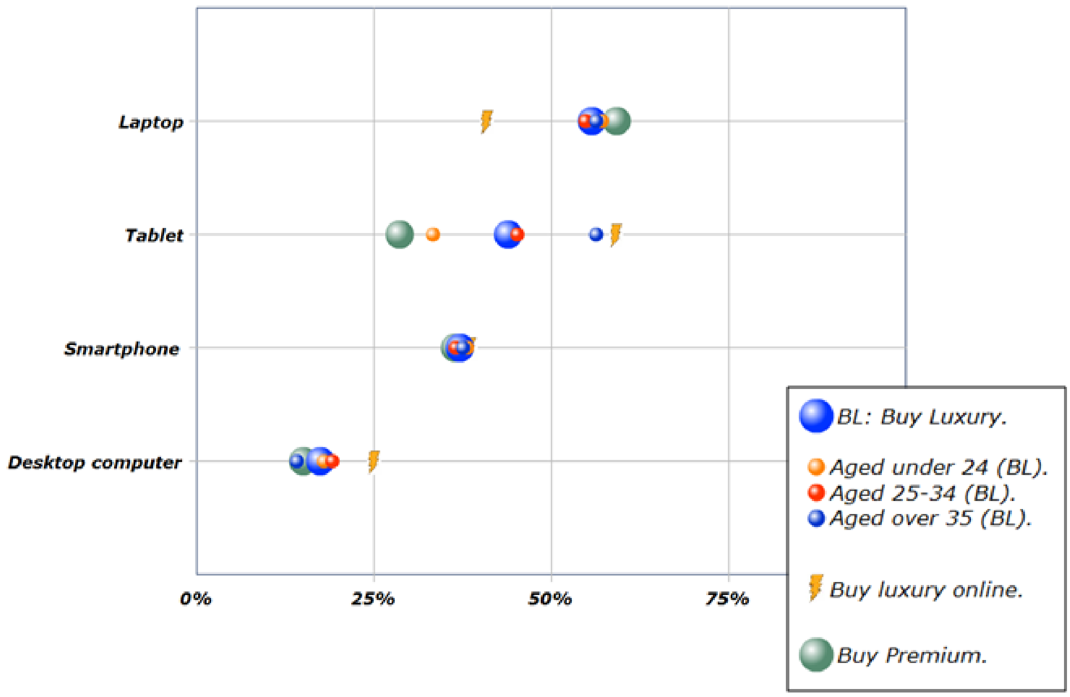
As for the type of device commonly used to access the Internet, the situation is more varied here.

- On average, the **laptop** is the most commonly used medium (55% of the luxury-buying group use one); however use of the laptop drops to 40% among luxury buyers online.

- **Tablets** and **smartphones** have a percentage of use of 44% and 37% respectively. But tablets are the devices most used by people who buy luxury online, with a percentage rate of 59%.

The following table shows the percentage of people who regularly use each of the devices to access the Internet. It shows the percentage of the total of people who purchased luxury, of the different age ranges in this group, of the group who bought premium products, and the group who purchases luxury goods online.

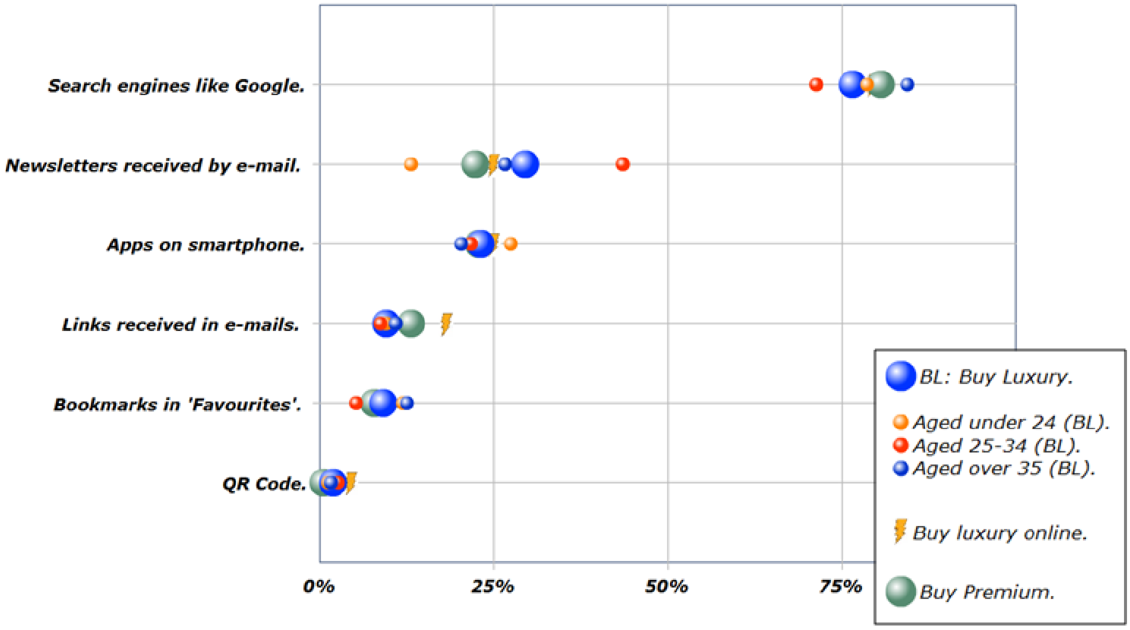
Type of device most commonly used to access the Internet.



As for the browser or system normally used to access information or for purchasing luxury or premium products, search engines such as Google are the most common (77% of people who buy luxury use it), followed at some distance by "Newsletters received by e-mail" (29%) and "Apps on smartphones" (23%).

Newsletters are more important for people between 25 and 34, 41% of whom say they use them, possibly as they are the group most likely to sign up for websites related to luxury or premium products.

Percentage of people who use each system or browser to look for information or to buy luxury or premium products.



COMPARISON MEXICO-SPAIN

The importance of the Internet as a shopping channel for luxury products in Mexico displays some differences compared with the situation in Spain. While in Spain the Internet is used by 24% of the people who buy luxury to purchase this type of product, Internet usage in Mexico is only 17% among people who buy luxury.

There appear to be two reasons which explain these differences:

1. In Mexico the security risk when purchasing a luxury product over the Internet is perceived as higher than in Spain. Of all of the luxury buyers in Mexico, 40% mentioned lack of trust in the local delivery services as one of the reasons to prefer shopping in stores to buying online; in Spain, only 1% mentioned problems with internet security and 12% gave "damage in shipping" as a major reason for not buying online.

2. Customers of luxury products in Mexico find going shopping a rewarding experience: 60% mention that being able to go shopping is a major reason why they prefer shopping in stores rather than buying online, compared to only 20% of Spanish customers. In addition, 82% of the Mexican luxury buyers group believe it is important to see and touch the product, while in Spain only 11% mention it as a major reason to buy in stores.

Both in Mexico and in Spain the role of the most credible "opinion leaders" is filled by magazine websites, brand websites and articles in print magazines. Just two differences between the two countries regarding sources of information should be drawn attention to: adverts in print magazines are considered a source of information for 70% of luxury customers in Mexico, while in Spain this percentage drops to 57%. By contrast, in Spain the advice of staff in shops is rated as important by 64% of customers, while in Mexico the percentage drops to 42%.

The use of the Internet as an information medium has a similar amount of importance in both countries (78% of luxury customers in Mexico and 77% in Spain usually visit luxury websites) and the role that the different sites play is the same in both countries: magazine websites are consulted to find out about trends and new products, brand websites to buy and social media to express opinions.

What is worth noting is the greater use of new technologies by the Mexican customer compared to the Spanish customer when seeking information or buying luxury items. Tablets and Smartphones are used by 44% and 37% respectively of the people who buy luxury in Mexico, while in Spain only 14% use tablets and 7% smartphones for visiting websites or purchasing items.

		Mexico	**Spain**
% of luxury customers who buy...	Fashion	44%	29%
	Accessories	34%	23%
	Cosmetics	78%	82%
	Jewellery	9%	11%
	Watches	6%	12%

% of people who buy luxury that do some of their shopping online	17%	24%

Reasons for preferring to make a purchase over the Internet.	**1. Convenience.**	**1. Availability of products and models.**
	2. Availability of products and models.	**2. Saving time.**
	3. Saving time.	3. Wide variety of products.
	4. Finding lower prices.	4. Feeling uncomfortable in the store.
	5. Comparing prices easily.	5. Finding lower prices.
	6. Wide variety of products.	6. Convenience.
	7. Feeling uncomfortable in the store.	7. Comparing prices easily.

Reasons to prefer making a purchase in a shop rather than online.	**1. See and touch the product.**	**1. Advice from shop staff.**
	2. I like going shopping.	**2. I like going shopping.**
	3. I do not trust local delivery services.	3. Damage in online shipping.
	4. I do not trust Internet security.	4. I cannot find the product on the Internet.
	5. Waiting time on the Internet.	5. See and touch the product.
	6. High import taxes.	6. I do not trust Internet security.
	7. Advice from shop staff.	
	8. I cannot find the product on the Internet.	
	9. Damage in online shipping.	

Regularly visit luxury goods websites.	**78%**	**77%**

	Mexico	Spain
Sources of information in order of importance when purchasing a luxury product.	**1. Personal Experience.**	**1. Personal Experience.**
	2. Visit to Shops.	**2. Brand Websites.**
	3. Brand Websites.	**3. Visit to Shops.**
	4. Articles in Print Magazines.	**4. Articles in Print Magazines.**
	5. Magazine Websites.	**5. Magazine Websites.**
	6. Adverts in Print Magazines.	6. Recommendation from Friends.
	7. Shopping portals.	7. Advice in Shops.
	8. Recommendation from Friends.	8. Adverts in Print Magazines.
	9. Social networks.	9. Shopping portals.
	10. Blogs	10. Blogs
	11. Celebrities.	11. Forums.
	12. Forums.	12. Social networks.
	13. Banners.	13. Celebrities.
	14. Advice in Shops.	14. Banners.

Devices used to access the Internet.	Laptop	56%	64%
	Tablet	**44%**	14%
	Smartphone	**37%**	7%
	Desktop computer	17%	15%