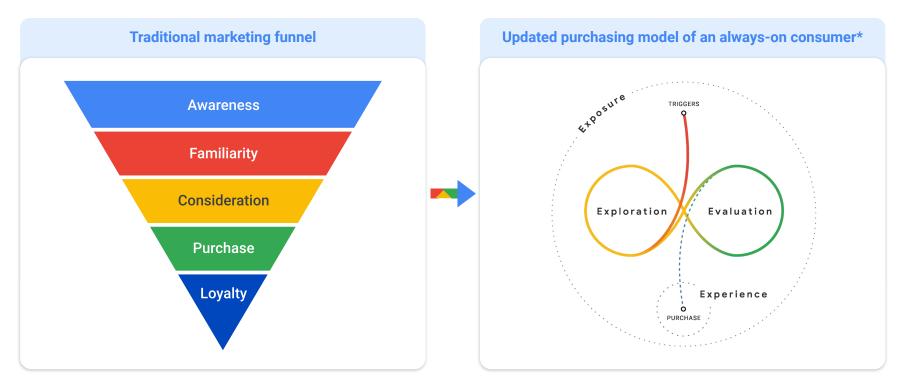
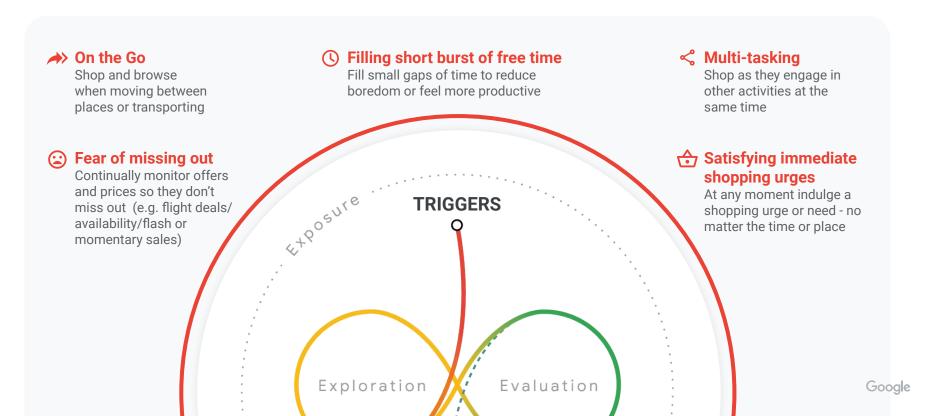


The purchase journey has evolved over time and is not a linear in a online world. We call it the "messy middle"



Five needs trigger more and more shoppers to browse on mobile web



Untapped opportunity

While shoppers are browsing more and more on mobile devices, conversion rates on mobile web remain ~50% lower than on desktop*.

Which means you might be missing out on incremental mobile revenue.



7 in 10 of mobile web shoppers are affected by the subpar web experience

Among shoppers that browse on mobile web:

4 out of 10 will purchase on another platform

- Online offers were suspicious and I was afraid to take a chance. Instead I went to the familiar, proven shop. Offline Buyer
- The app has already recorded all of my payment and delivery information" App Buyer
- "I wanted a bigger screen, and the purchasing process (payment, shipping, etc.) is much clearer. For major purchases, I prefer to use the laptop" PC Buyer

3 out of 10 will not purchase at all

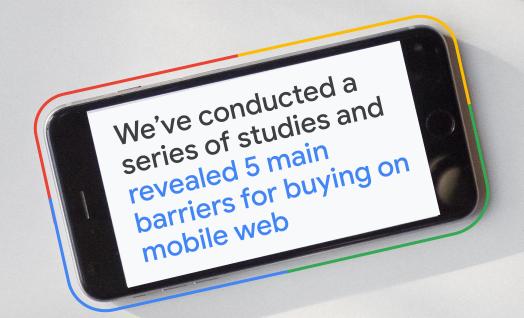
Across Europe, Middle East and Africa, retail businesses are missing out on billions in incremental revenue opportunity*, as shoppers' needs are currently not well met on mobile websites.

	Fashion	€7bn	+7%
6	Electronics	€4bn	+5%
***	Home & Garden	€4bn	+6%
	Personal Care	€1bn	+4%



Google

^{*€ &}amp; % figures for Fashion and Electronics are based on based on eMarketer & Statista 2019 data. People surveyed in 15 markets n = 6765 Home & Garden and Beauty are based on 2020 data. People survey in 6 markets n=2577

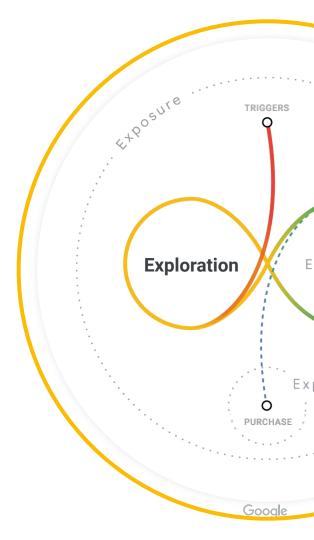


In the exploration stage scrolling fatigue is the main struggle



Scrolling Fatigue

Ubiquitous, continuous scrolling functionalities whereby searching, evaluating and finding specific information feels **monotonous, overly time consuming and aimless**



Shopper Story

Scrolling Fatigue

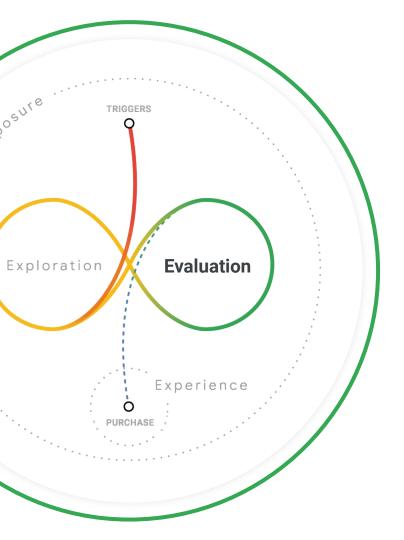


Simon is thinking about buying an electric shaver

He's found a site with a wide of range of products, but is struggling to explore the options on his phone. He's scrolling from side to side, up and down, in and out just to see what's available on the site.

Simon clicks on one product to inspect the details, but again finds himself scrolling all over, making finding simple information harder than it should be. With each scroll, he loses sight of what he saw before and the scrolling starts to feel endless.





And in evaluation stage users struggle to compare and bring items to life



Fragmented Comparison

Cumbersome, disorganised and overwhelming to compare between sites and offers



Bringing Items to Life

Items/experiences not optimally represented to make shoppers completely confident in what they'll receive

Shopper Story

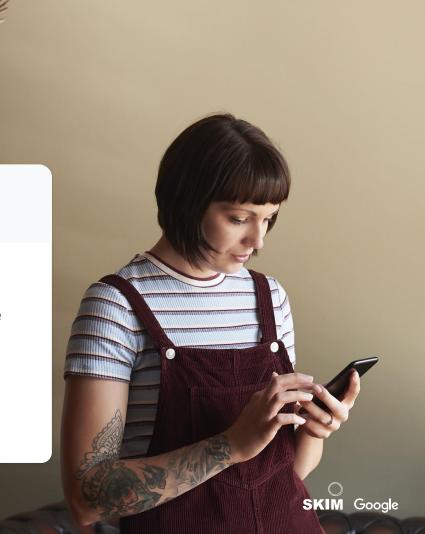
Fragmented Comparison



Maria is trying to buy a new laptop and is comparing a few options.

With each new site she opens on her mobile browser she is feeling a bit more overwhelmed. She is struggling to flick back and forth between different tabs and can't remember what she saw before.

She's not sure which is the best value for money, and what makes any of them different to the last one she viewed. Lost and confused, she delays her purchase.



Shopper Story

Bringing Items to Life



Kate is on the hunt for a new dress

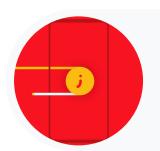
While browsing a few sites on her mobile phone, she finds a dress she likes, but is not quite sure about it... the pictures are small, limited and don't show as many details as she'd like. She tries to zoom in on the photos and description, but it's time consuming and she's still not confident of the quality or potential fit.

Worried she'll be disappointed and face the hassle of returning, she decides not to purchase it.



Unfulfilled autofill and information blindside hampers purchase





Information Blindside

Not until purchase is crucial information introduced that forces users to reconsider their decision

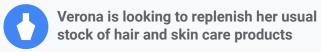


Unfulfilled Autofill

There aren't functionalities that enable users to instantly and effortlessly retrieve personal information

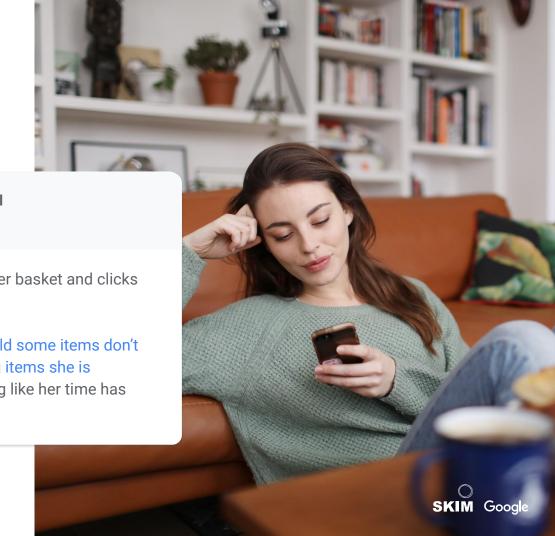
Shopper Story

Information Blindside



On her phone she adds all the products to her basket and clicks to check out.

She puts in all her details and is suddenly told some items don't deliver to her location; and for the remaining items she is struggling to find a delivery time slot. Feeling like her time has been wasted, Verona leaves the site.



Shopper Story

Unfulfilled Autofill

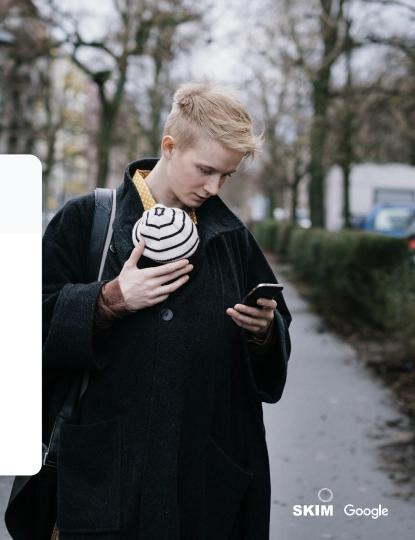


Enjoying her daily walk, Amanda decides to brighten up her house with some new plants.

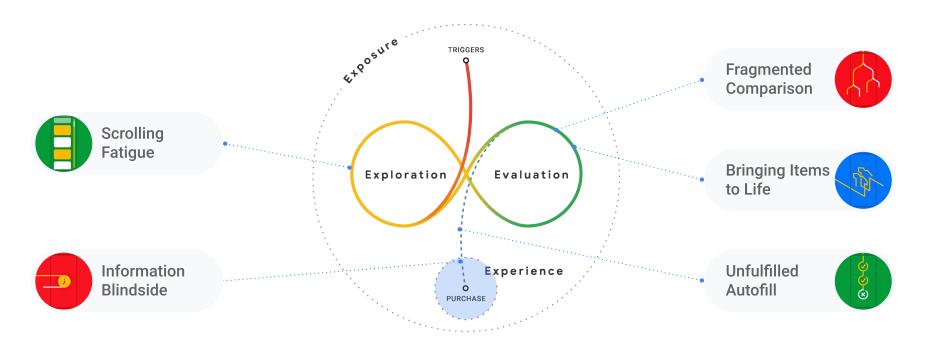
She pulls up her phone and finds a nice garden center that could deliver to her door.

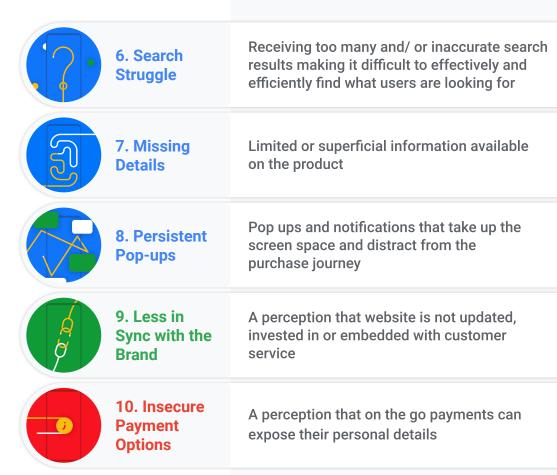
She selects a few plants and goes on to payment only to realise she doesn't have a credit card on her. The site doesn't recognise the payment options stored on her phone.

Disappointed, she decides to complete the order when she is back home but she can't find the same site again... and ends up buying from a competitor.



Together these pains keep build up a negative experience but, when addressed, help them navigate the messy middle





Further 5 barriers include:



In Fashion removing these 4 barriers will help to improve conversion rates

Fashion

€7bn

Top Barriers to Address (% incremental conversion uplift):

(!)	Unfulfilled Autofill	(+5.1%)
(!)	Bringing Items to Life	(+5.4%)
(!)	Scrolling Fatigue	(+1.7%)
(!)	Search Struggle	(+0.4%)



In Poland, these 4 barriers are the most prominent in Fashion shopping

Fashion

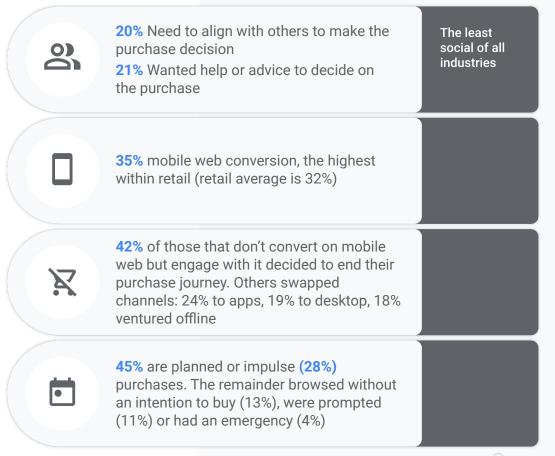
€231mn

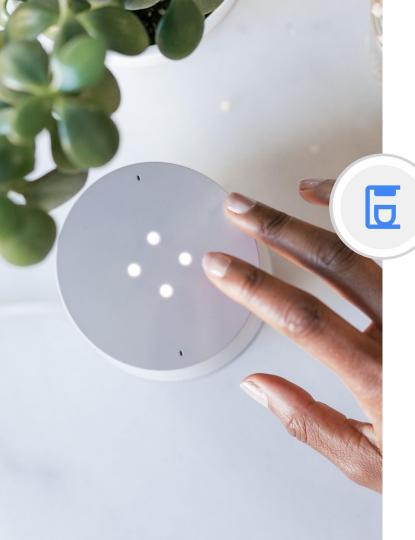
Top Barriers to Address (% incremental conversion uplift):

! Scrolling Fatigue	(+6.6%)
! Unfulfilled Autofill	(+4.7%)
! Fragmented Comparison	(+3.3%)
Persistent Pop-Ups	(+1.9%)



Fashion shoppers are highly individualistic & many resort to apps when encountering barriers





In Electronics removing these 4 barriers will help to improve conversion rates

Electronics

Unfulfilled Autofill

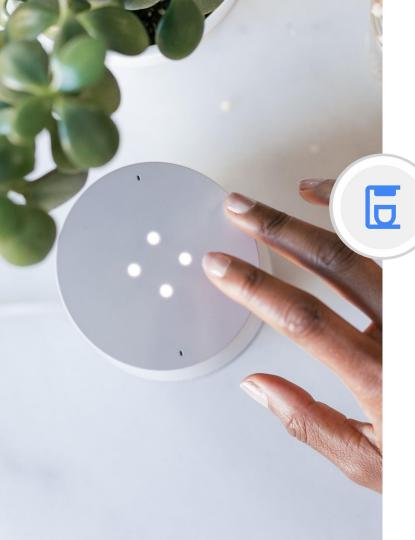
€4bn

(±0 10/)

Top Barriers to Address (% incremental conversion uplift):

	Officialitied Automi	(TO. 1 %)
(!)	Bringing Items to Life	(+6.5%)
(!)	Fragmented Comparison	(+2.6%)

! Scrolling Fatigue (+0.7%)



In Poland, these 4 barriers are the most prominent in Electronics shopping

Electronics

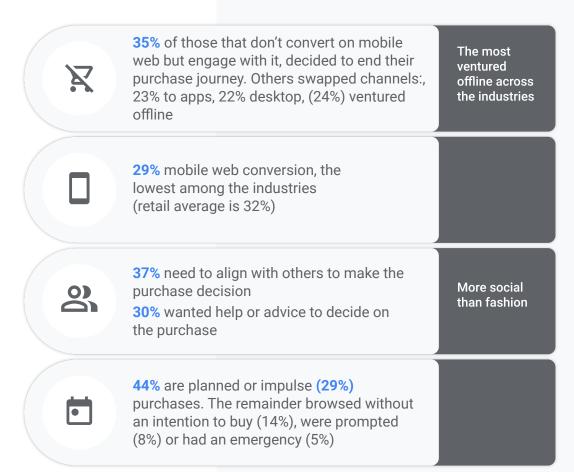
€222mn

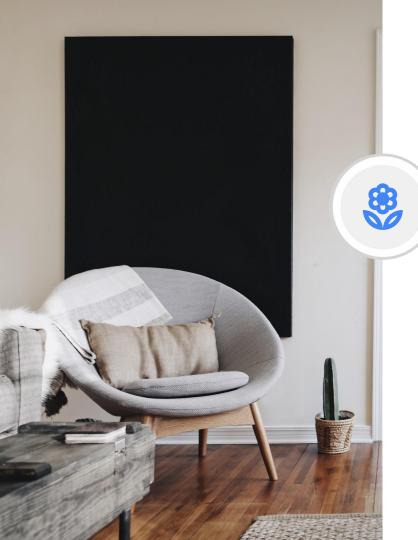
Top Barriers to Address (% incremental conversion uplift):

! Scrolling Fa	(+7.0%)
----------------	---------



Electronics shoppers are the most likely to go offline to touch and feel products they are about to buy





In Home & Garden removing these 3 barriers will help to improve conversion rates

Home & Garden

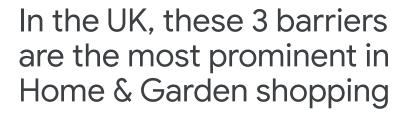
€3.5bn

Top Barriers to Address (% incremental conversion uplift):

(!)	Information Blindside	(+6.5%)
(!)	Bringing Items to Life	(+5.7%)

Scrolling Fatigue (+1.0%)







Home & Garden

€795mn

Top Barriers to Address (% incremental conversion uplift):

(!)	Information Blindside	(+4.7%)
(!)	Bringing Items to Life	(+4.7%)
(!)	Scrolling Fatigue	(+4.0%)

"I found it hard to know the exact size and length of the lamp and if I could have gone into the shop to see it in real life that would have been helpful."

Home & Garden shopper, UK

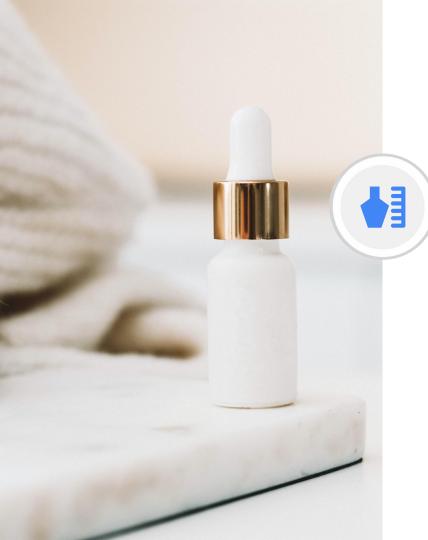


Home & Garden

shoppers are the most social and also highly impulsive when making a purchase



33% Of those that don't convert on mobile web but engage with it, decided to end their purchase journey. Others swapped channels: 22% to desktop, 15% to apps, 36% ventured offline



In Personal Care removing these 3 barriers will help to improve conversion rates

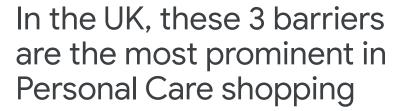
Personal Care

€0.7bn

Top Barriers to Address (% incremental conversion uplift):

! Scrolling Fatigue	(+5.1%)
---------------------	---------









Personal Care

€90mn

Top Barriers to Address (% incremental conversion uplift):

	([)

Scrolling Fatigue

(+2.8%)



Search Struggle

(+2.8%)



Missing Details

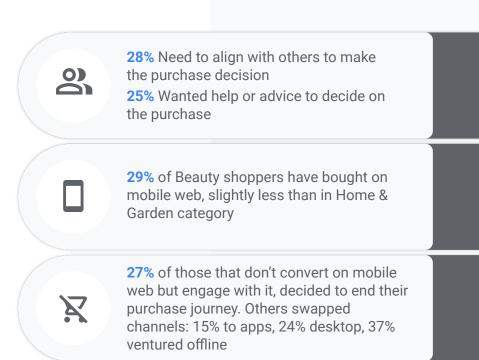
(+2.8%)

"If I can't find the search bar easily or it doesn't return what I'm expecting it to return and I get a kind of mismatch of lots of stuff that puts me off. I have an idea of what I want and I don't like to be presented with irrelevant stuff"

Personal Care shopper, UK



Beauty shoppers are highly individualistic and many resort to other channels when encountering barriers





58% are planned or impulse **(26%)** purchases. The remainder were prompted (9%), browsed without an intention to buy (4%), or had an emergency (3%)

The most planned purchases



Next Steps

- Review how your site scores on 5 barriers. Run user testing if needed
- Decide 1-3 key barriers to focus on and set up KPIs
- Review your roadmap: prioritise and add features according to the barriers in focus
- Implement changes and test the impact

Assign a Mobile Champion who will regularly track your progress.



COVID-19 impact on the results of the studies presented



Consumer perspective

- Lockdowns accelerated the shift to ecommerce and mobile traffic continues to grow
- We saw users who were reluctant to shop on mobile web being forced to do so and actually finding the experience better than they've expected
 - Most of the barriers are related to the basics of good UX and are still
- experienced by users. In lockdown we saw "Information Blindside" becoming more of an issue as users wanted up-to-date information



Brands perspective

- → Lockdowns showed the importance of online presence so we expect more investments in user experience from brands
- Pausing of major marketing campaigns has allowed brands to do their user experience "homework"
- We expect brands that provide great user experience with manage to capture bigger market share in recovery



Scrolling fatigue

Help to scan

- App Shell model
- Top categories
- Number of items loaded
- Number of results
- Add to favourites

Help to navigate

- Sticky menu
- Visible search bar and relevant results
- Prominent and extensive filtering

Help to decide

- Recommendations
- Personalisation
- Urgency messaging
- **♦** Benefit-oriented value proposition



Unfulfilled autofill

Help to fill in

- Orrect Autofill implementation
- Real-time feedback
- Google Places API

Help to skip

- Virtual Assistants
- One tap Sign Up/Sign In
- Google Pay, PayPal and other payment solutions

Fragmented comparison

Help to compare

- Skimmable results
- Shopping listings
- Add to compare
- Progressive Web Apps

Help to feel confident

Price matching

Persistent Pop-ups

Help to access the needed information

- Permissions only when needed
- Noticeable but not intrusive notifications

Information Blindside

Help to understand

- Avoid <u>hidden costs</u>
- → Provide <u>key information</u>
- Adapt <u>design to uncertain times</u>

Bringing items to life

Help to visualize

- Good product descriptions
- High-quality zoomable images
 (including IRL: e.g. people wearing clothing)
- → Landscape friendly design
- Videos
- Size guides/comparisons
- → 3D view
- AR
- → Item in real environments

Help to feel confident

- Olear return policies & shipping information
- Customer reviews



About the study

Sample

In Wave 1 (Aug-Dec 2019) we spoke to 18,560 respondents in 15 markets (UK, France, Germany, Italy, Spain, Netherlands, Belgium, Sweden, Denmark, Norway, Poland, Russia, Turkey, UAE, and Saudi Arabia) across three stages of the research: Market Scoping (9,655), Journey Pathways (2,140), and Opportunity Sizing (6,765), covering Fashion and Consumer Electronics.

In Wave 2 (July-Aug 2020) we did qualitative interviews with 16 mobile web buyers and browsers in Germany and the UK, followed by Opportunity Sizing with 2,577 participants in the UK, France, Germany, Italy, Spain, and Saudi Arabia, covering Home & Garden and Personal Care categories.

Methodology

Wave 1:

- 1. Immersion: Interviews with mobile web experts across all markets to understand their viewpoints on the current state of mobile web shopping.
- 2. Market Scoping: Online survey to explore consumer patterns and preferences on mobile web shopping vs other channels.
- 3. Decision Journeys: Observing individual shopper journeys with an online interactive chatbot followed up by qualitative interviews to deep dive into specific issues encountered by mobile shoppers that abandoned their purchases.
- 4. Opportunity Sizing: Online survey that uses driver analysis methodology to model the likelihood of consumers making a purchase on mobile web when faced with sets of barriers. By looking at removing specific barriers or groups of barriers we were able to estimate the incremental revenue that is currently being missed out on by companies due to these user barriers.

Wave 2: We repeated the qualitative interviews with shoppers in new categories: Home & Garden and Personal Care - to validate the barriers and to learn about COVID-19 impact on their shopping behaviour. Then we repeated the Opportunity Sizing for these two categories.



