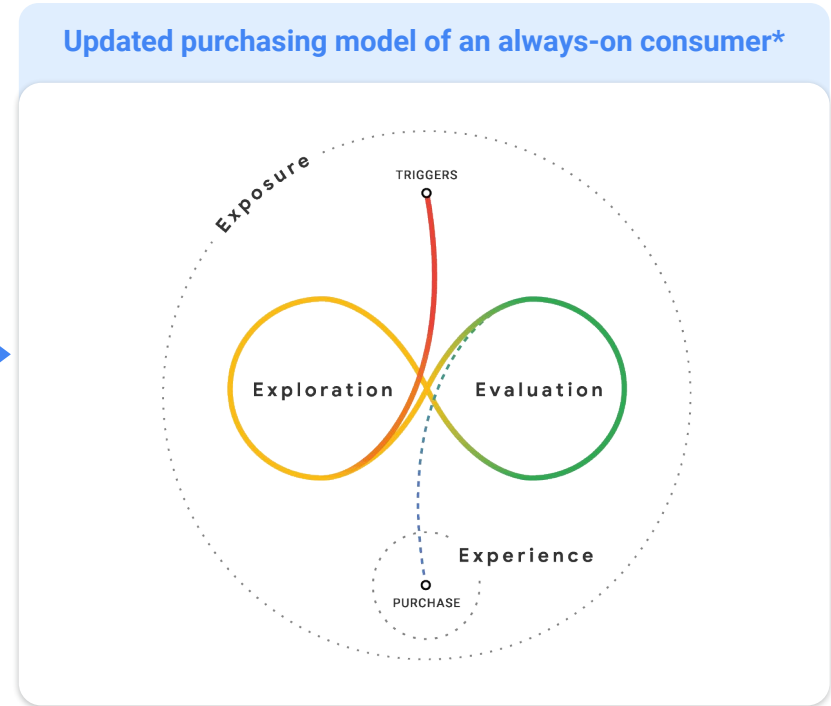


Mobile pains & incremental gains

17 Sep 2020



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

➡ **On the Go**

Shop and browse when moving between places or transporting

🕒 **Filling short burst of free time**

Fill small gaps of time to reduce boredom or feel more productive

🔗 **Multi-tasking**

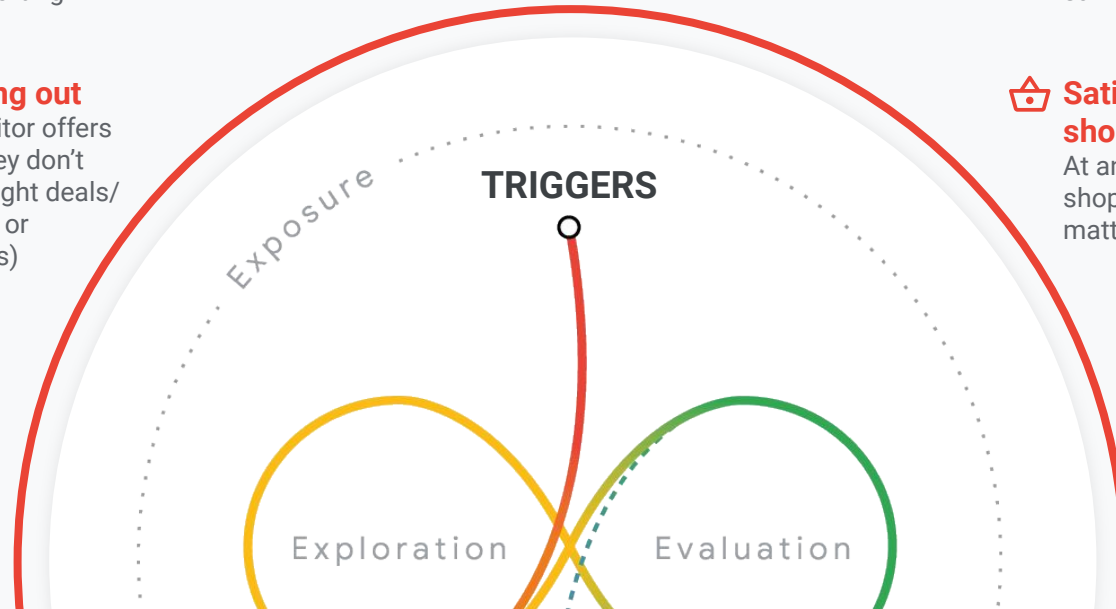
Shop as they engage in other activities at the same time

😞 **Fear of missing out**

Continually monitor offers and prices so they don't miss out (e.g. flight deals/availability/flash or momentary sales)

🏠 **Satisfying immediate shopping urges**

At any moment indulge a shopping urge or need - no matter the time or place



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.**



-50%

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](#)

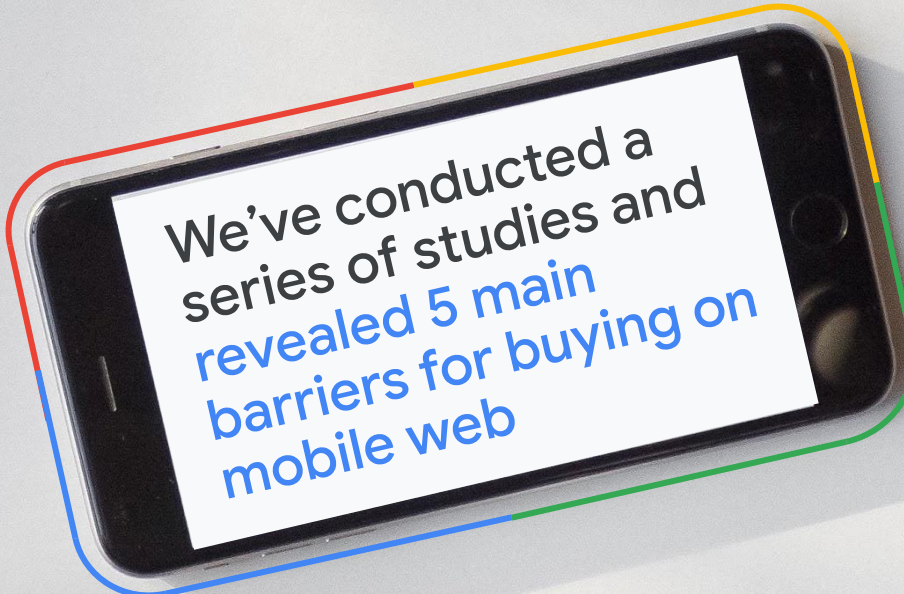
3 out of 10 will not purchase at all

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.



*€ & % 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



A top-down view of a smartphone lying on a light gray surface. The phone's screen is white and displays text. The phone is framed by a thick, multi-colored border consisting of red, yellow, and green segments. In the background, a portion of a cork coaster is visible at the top, and a small potted plant is at the bottom left.

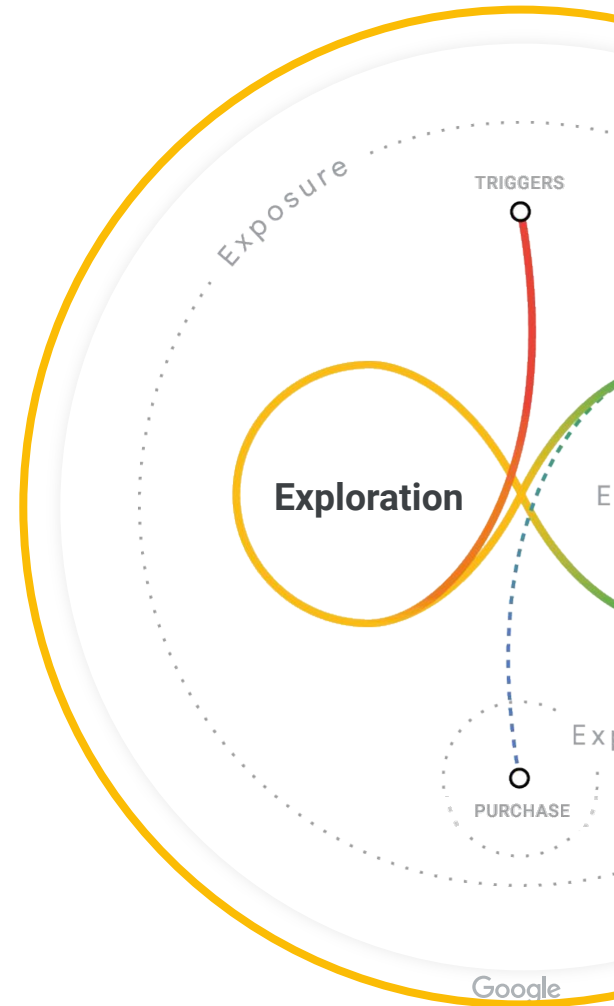
We've conducted a
series of studies and
revealed 5 main
barriers for buying on
mobile web

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

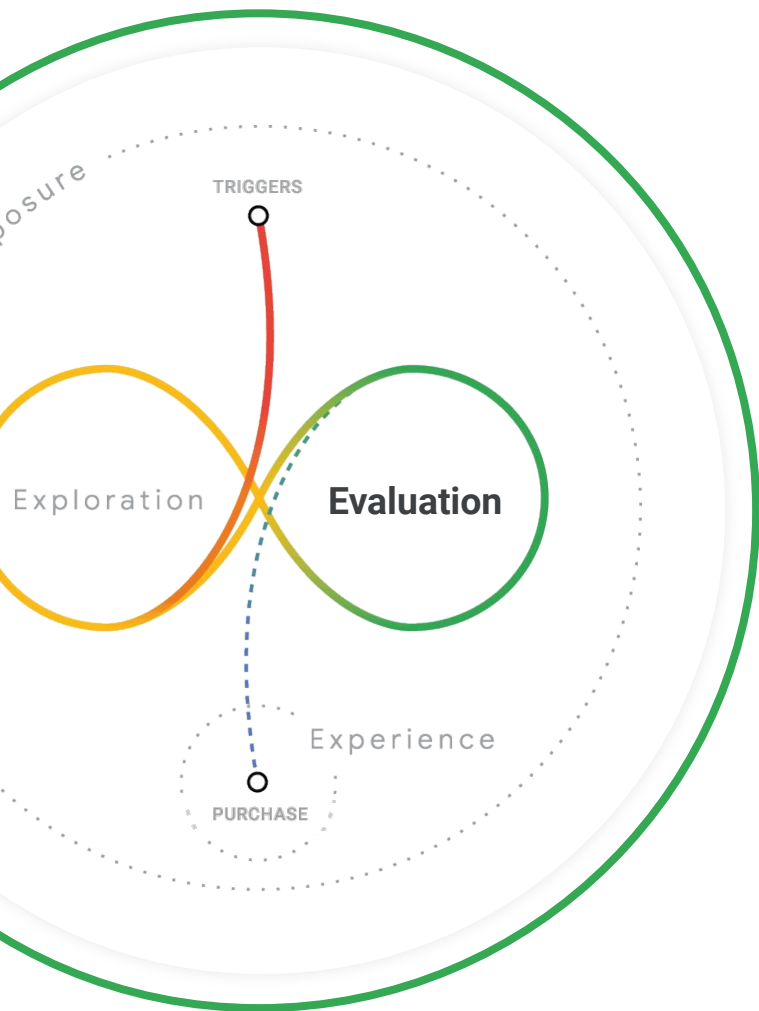


Simon is thinking about buying an electric shaver

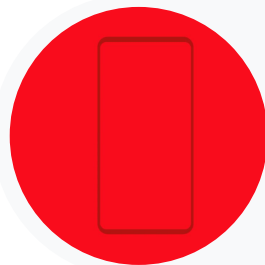
He's found a site with a wide of range of products, but is struggling to explore the options on his phone. **He's scrolling from side to side, up and down, in and out just to see what's available on the site.**

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

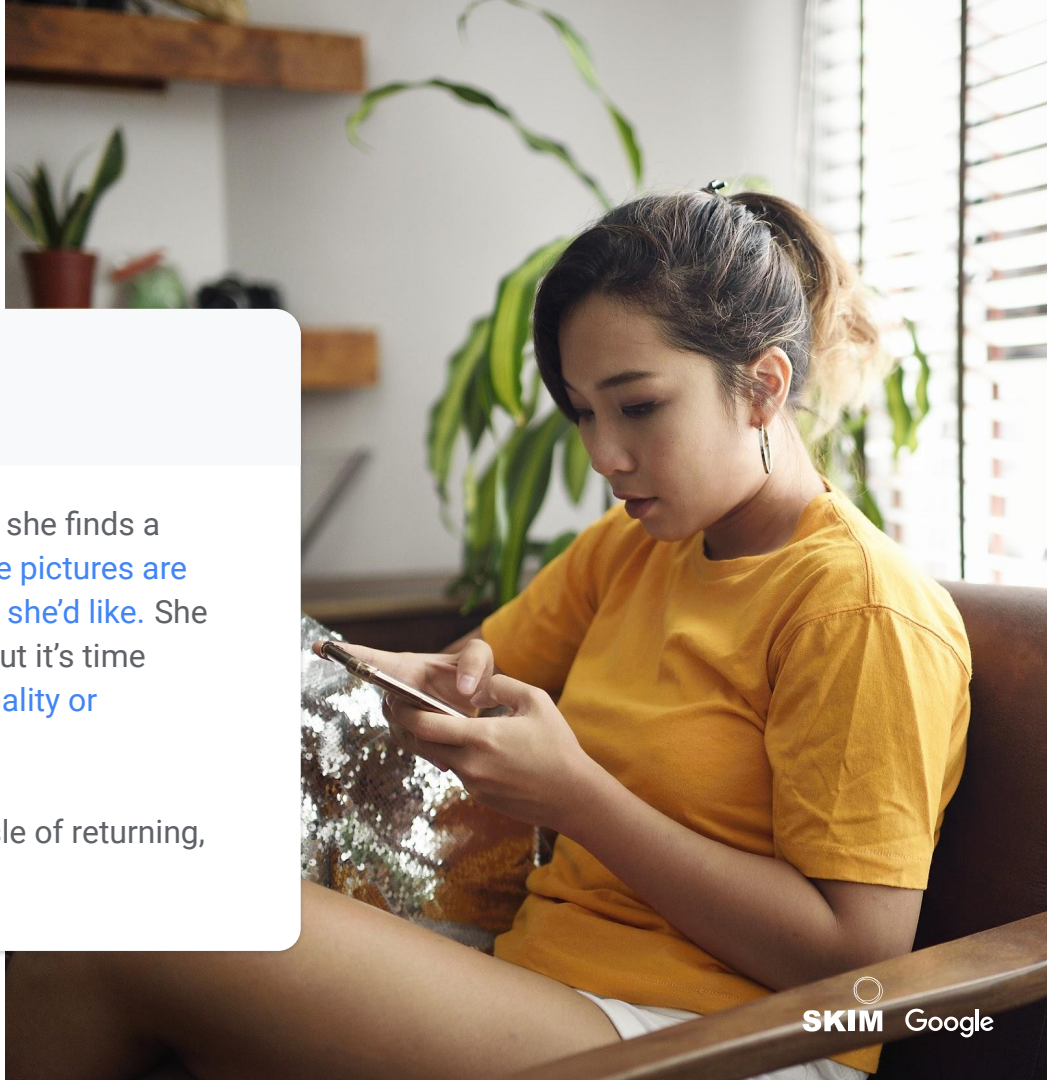
Bringing Items to Life



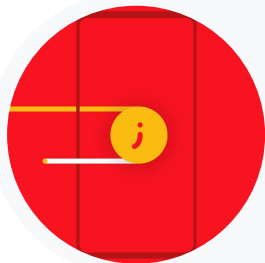
Kate is on the hunt
for a new dress

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.

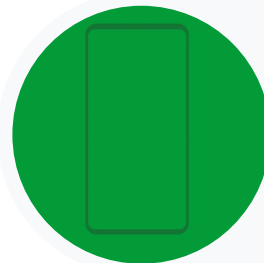


Unfulfilled autofill and information blindsides hampers purchase



Information Blindsides

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

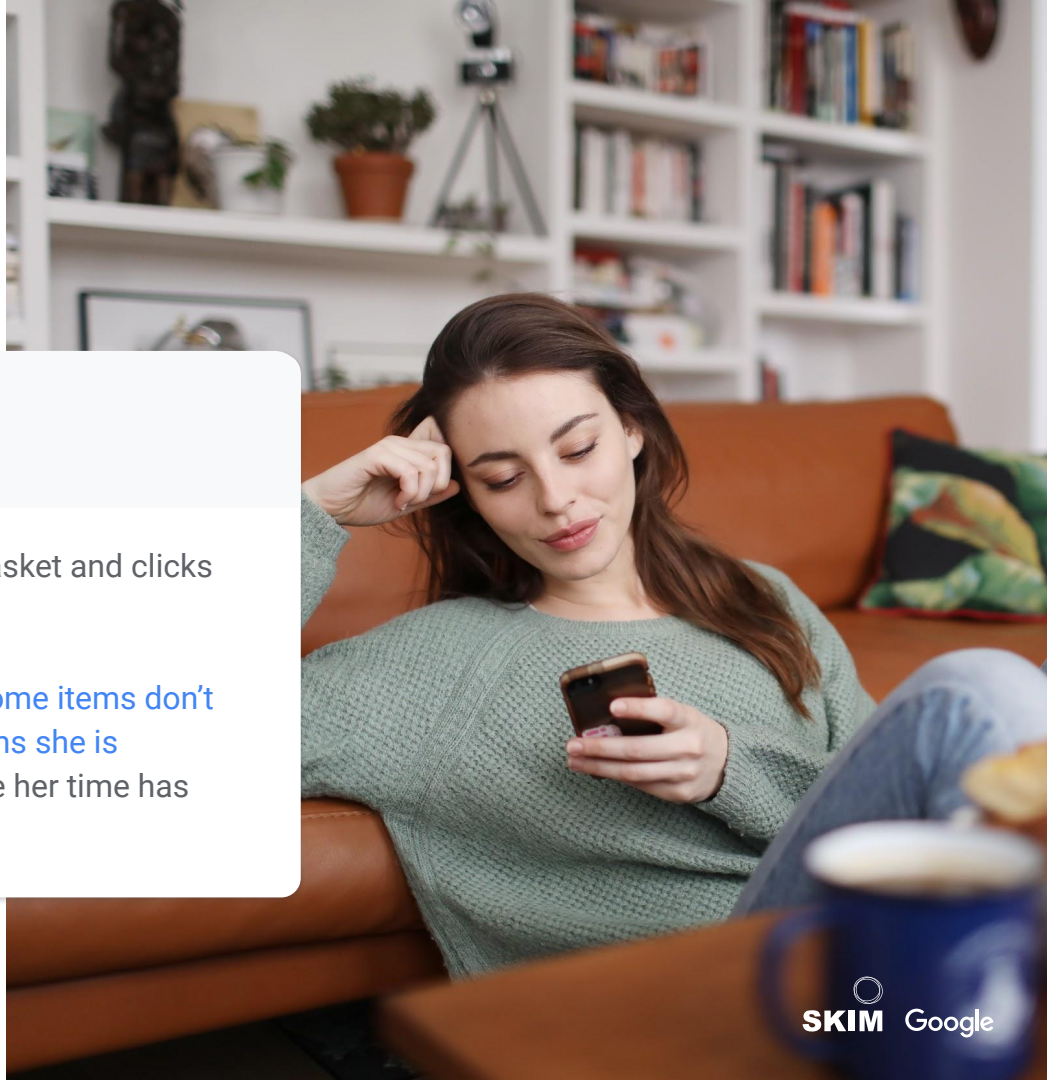
Information Blindside



Verona is looking to replenish her usual stock of hair and skin care products

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

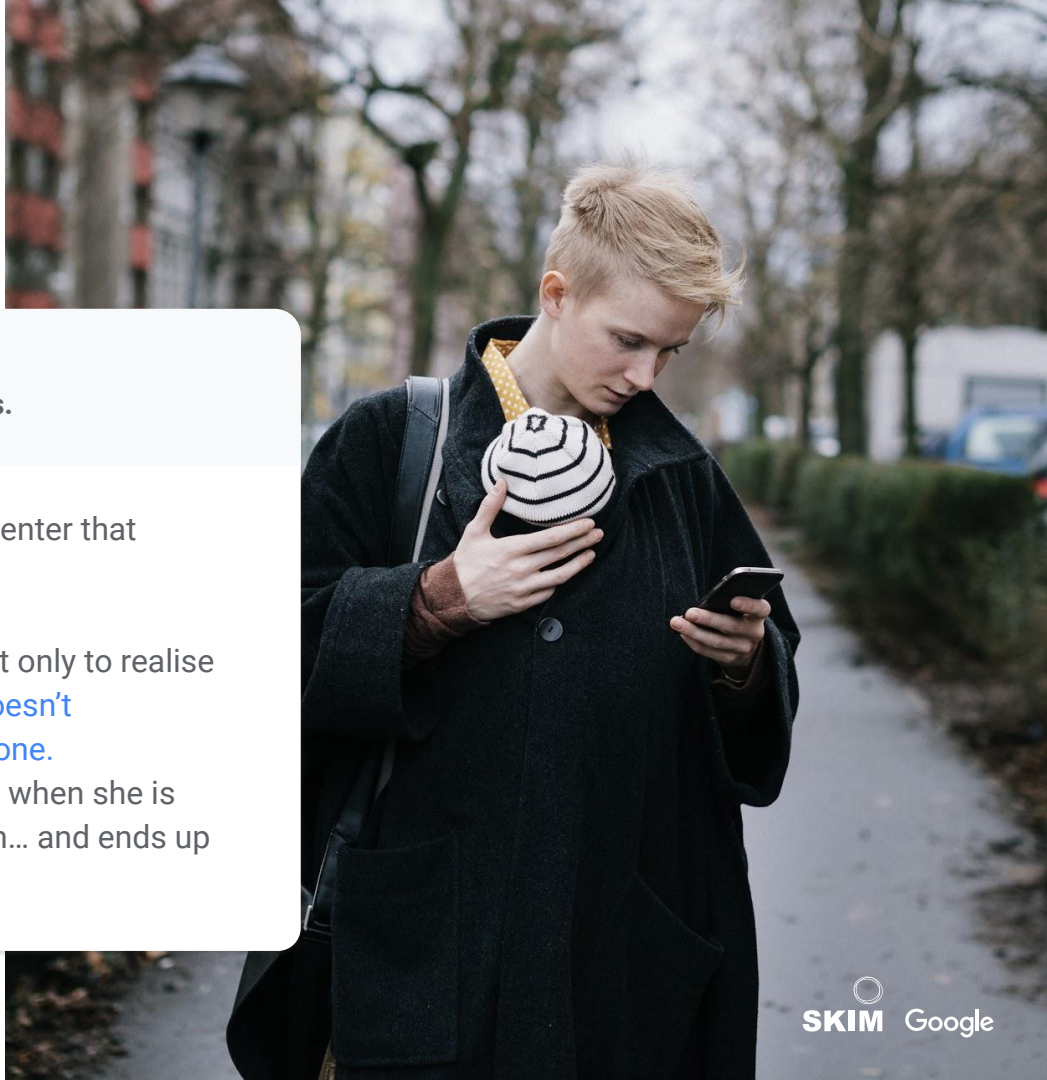


Enjoying her daily walk, Amanda decides to brighten up her house with some new plants.

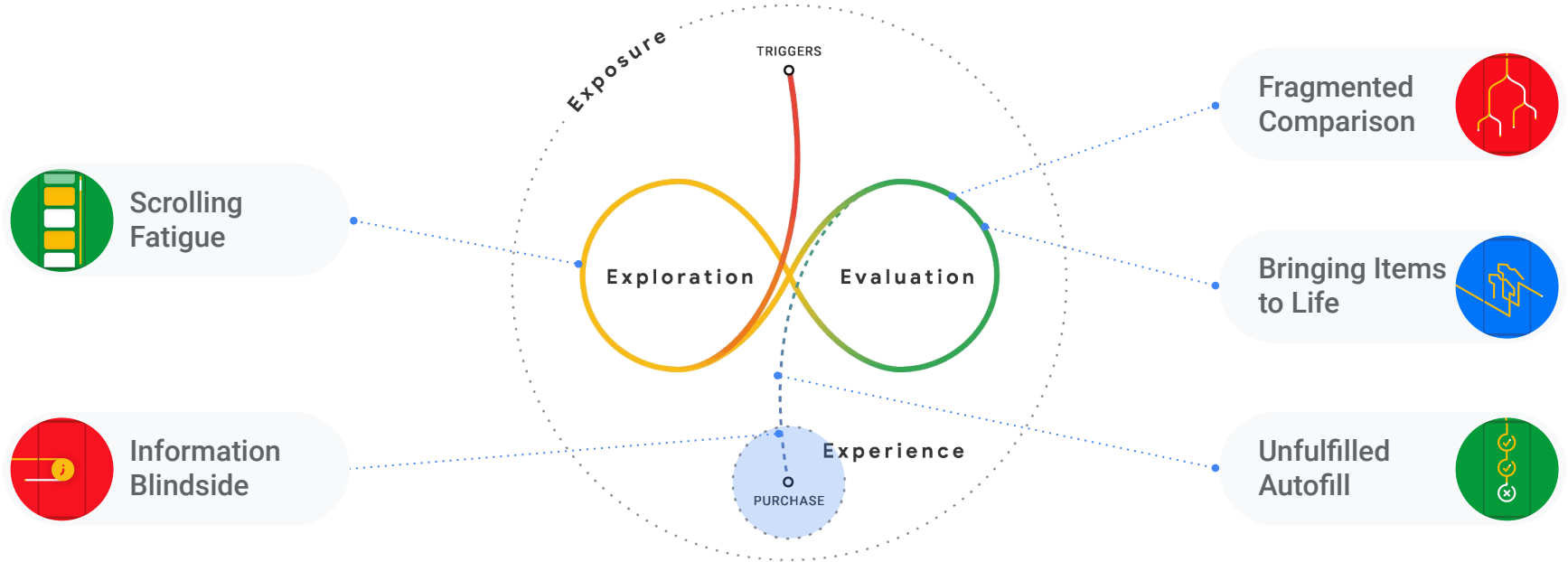
She pulls up her phone and finds a nice garden center that could deliver to her door.

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.**

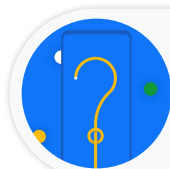
Disappointed, she decides to complete the order when she is back home but she can't find the same site again... and ends up buying from a competitor.



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



Further 5
barriers include:



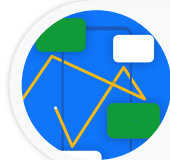
6. Search Struggle

Receiving too many and/ or inaccurate search results making it difficult to effectively and efficiently find what users are looking for



7. Missing Details

Limited or superficial information available on the product



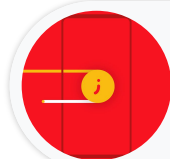
8. Persistent Pop-ups

Pop ups and notifications that take up the screen space and distract from the purchase journey



9. Less in Sync with the Brand

A perception that website is not updated, invested in or embedded with customer service



10. Insecure Payment Options

A perception that on the go payments can expose their personal details



In Fashion removing these 4 barriers will help 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 KSA, these 4 barriers are the most prominent in Fashion shopping



Fashion

€678mn

Top Barriers to Address (% incremental conversion uplift):



Information Blindside

(+3.9%)



Unfulfilled Autofill

(+3.3%)



Fragmented Comparison

(+2.8%)



Missing Details

(+2.2%)

"My credit card info got hacked when I used a mobile site. Not all mobile sites can be trusted"

- Fashion shopper, KSA



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



Fashion

€222mn

Top Barriers to Address (% incremental conversion uplift):



Bringing Items to Life

(+6.2%)



Fragmented Comparison

(+5.2%)



Information Blindside

(+5.2%)



Unfulfilled Autofill

(+4.7%)

"I get frustrated when I like something and I decide to buy it and when I go to pay it's out of stock"

- Fashion shopper, UAE



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



20% need to align with others to make the purchase decision

21% wanted help or advice to decide on the purchase

The least social of all industries



35% mobile web conversion, the highest within retail (retail average is 32%)



42% of those that don't convert on mobile web but engage with it decided to end their purchase journey. Others swapped channels: 24% to apps, 19% to desktop, 18% ventured offline



45% are planned or impulse (**28%**) purchases. The remainder browsed without an intention to buy (13%), were prompted (11%) or had an emergency (4%)



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



Electronics

€4bn

Top Barriers to Address (% incremental conversion uplift):



Unfulfilled Autofill

(+8.1%)



Bringing Items to Life

(+6.5%)



Fragmented Comparison

(+2.6%)



Scrolling Fatigue

(+0.7%)



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



Electronics

€316mn

Top Barriers to Address (% incremental conversion uplift):



Bringing Items to Life

(+8.9%)



Unfulfilled Autofill

(+8.9%)



Persistent Pop-Ups

(+8.3%)



Insecure Payments

(+6.3%)



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



Electronics

€176mn

Top Barriers to Address (% incremental conversion uplift):



Persistent Pop-Ups

(+7.2%)



Unfulfilled Autofill

(+4.8%)



Bringing Items to Life

(+3.6%)



Insecure Payment

(+3.0%)

"I don't buy from the mobile sites as much because my information isn't saved there [my card information, my home and work address] like it is on the apps"

- Electronics shopper, UAE



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



35% of those that don't convert on mobile web but engage with it, decided to end their purchase journey. Others swapped channels; 23% to apps, 22% desktop, (24%) ventured offline

The most ventured offline across the industries



29% mobile web conversion, the lowest among the industries (retail average is 32%)



37% need to align with others to make the purchase decision
30% wanted help or advice to decide on the purchase

More social than fashion



44% are planned or impulse (**29%**) purchases. The remainder browsed without an intention to buy (14%), were prompted (8%) or had an emergency (5%)



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%)



In KSA, these 3 barriers are the most prominent in Home & Garden shopping



Home & Garden

€206mn

Top Barriers to Address (% incremental conversion uplift):



Bringing Items to Life

(+6.0%)



Information Blindside

(+5.3%)



Search Struggle

(+4.2%)



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



47% need to align with others to make the purchase decision
25% wanted help or advice to decide on the purchase

The most social and most guidance sought across industries



45% are planned or impulse (**35%**) purchases. The remainder browsed without an intention to buy (7%), were prompted (**8%**) or had an emergency (4%)

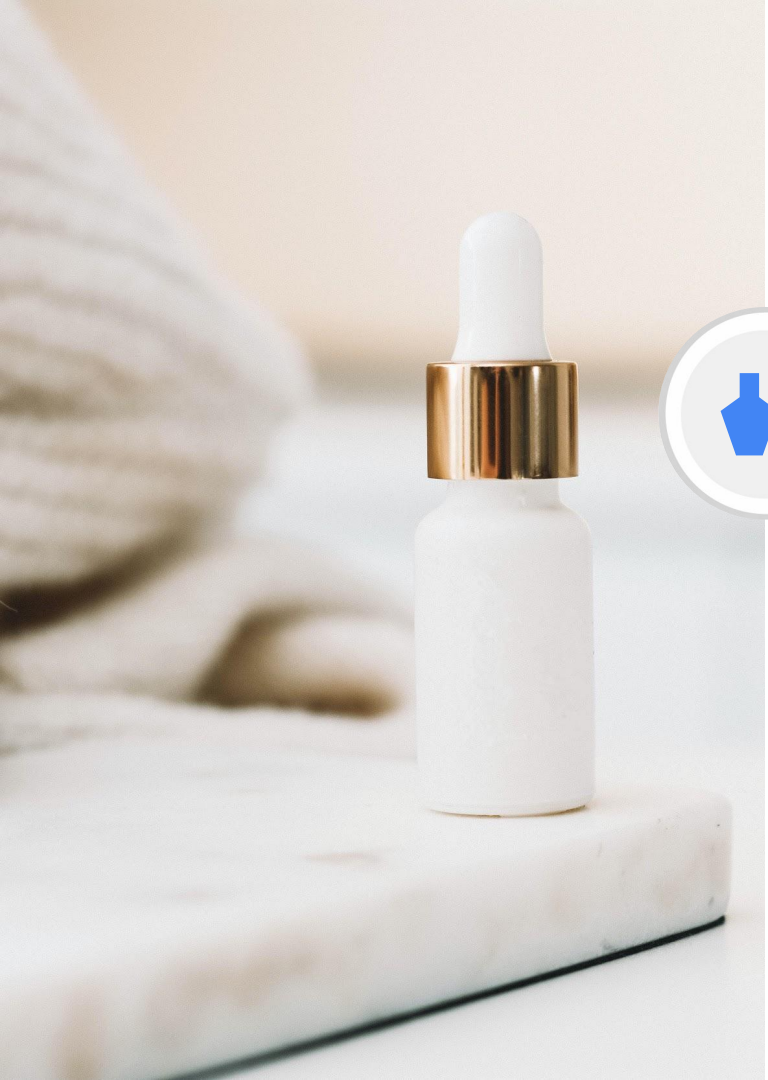
The highest impulse purchase rate



30% of Home & Garden shoppers have bought on mobile web, slightly above the rate for Personal Care



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%)



Information Blindside

(+1.4%)



Search Struggle

(+0.3%)



In KSA, these 3 barriers are the most prominent in Personal Care shopping



Personal Care

€73mn

Top Barriers to Address (% incremental conversion uplift):



Search Struggle

(+7.7%)



Scrolling Fatigue

(+7.2%)



Missing Details

(+6.3%)



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



28% Need to align with others to make the purchase decision

25% Wanted help or advice to decide on the purchase



29% of Beauty shoppers have bought on mobile web, slightly less than in Home & Garden category

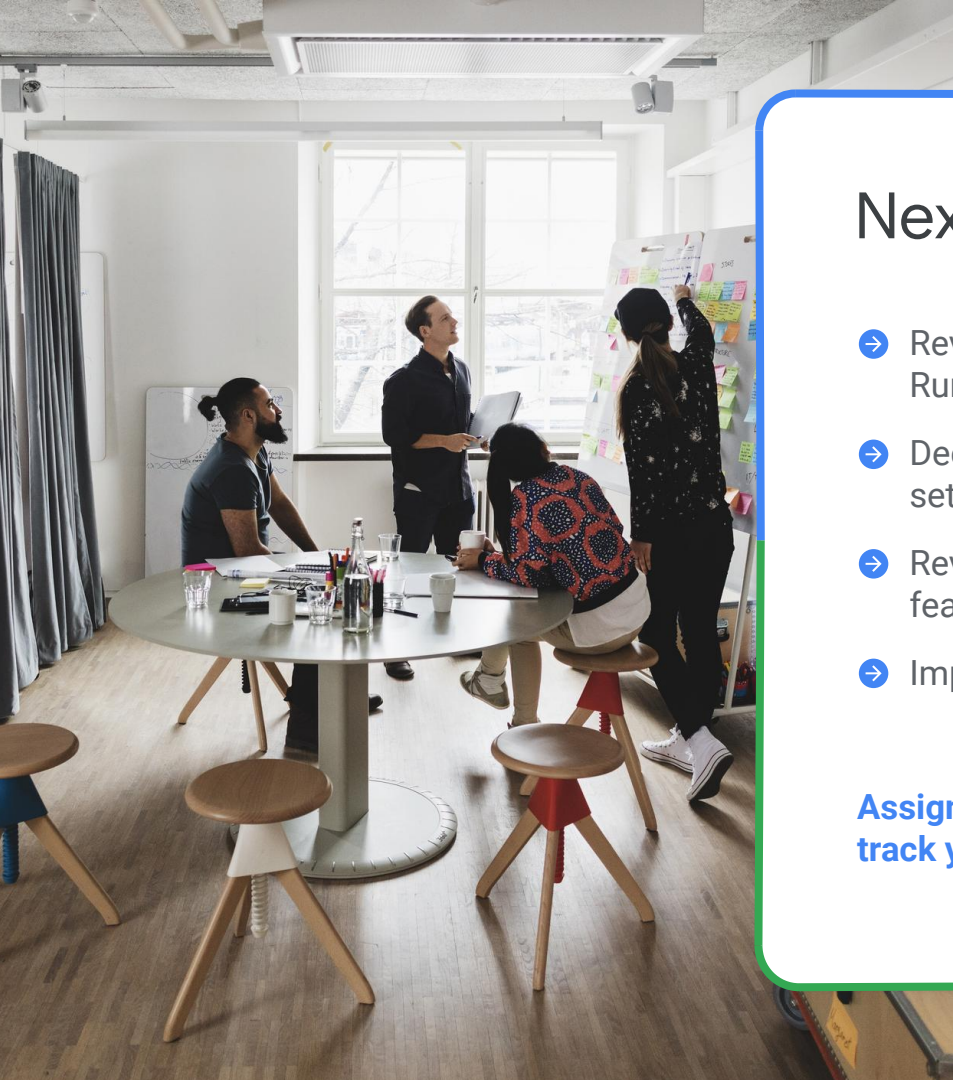


27% of those that don't convert on mobile web but engage with it, decided to end their purchase journey. Others swapped channels: 15% to apps, 24% desktop, 37% ventured offline



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.



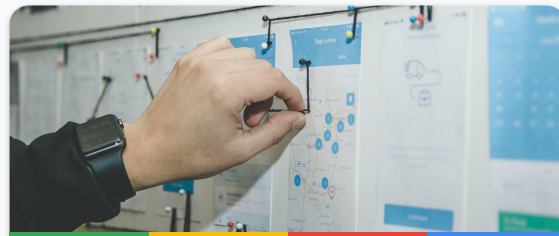
COVID-19 impact on the results of the studies presented



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 to capture bigger market share in recovery



Solutions



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

- Correct [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 [hidden costs](#)
- Provide [key information](#)
- Adapt [design to uncertain times](#)



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

- Clear 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.

Thank you

