

| Shopping on mobile / SE

Exploring how people use their smartphones for shopping activities

Q3 2016



Google Market Insights

About this study

Background: Mobile apps and sites are a vital channel for advertisers to engage with consumers. Google would like to be able to provide advertisers with a strong understanding of behaviors on mobile apps and sites so that they can design the most effective mobile strategy.

Objective: To help advertisers understand the Shopping-related activities people use their smartphones for and how people find, use and stay engaged with apps in this category.

Methodology	15 minute online questionnaire covering shopping category.	
Population	Smartphone users, 18-64, who used smartphone for shopping in the past month Quotas set on enumeration data per vertical for age, gender, education, and Internet usage frequency. <small>To ensure vertical representation, a 'soft launch' based on the online population was conducted to determine the makeup of each vertical. After the soft launch was complete and each vertical's makeup was defined, quotas were set per vertical to match this universe. Weighting was applied on the back-end if needed.</small>	
Sample Size	N = 500 per vertical	
Market(s)	SE (also available for UK, US, CA, FR, NL, RU, TR, IL, KSA)	

| Contents



Smartphone Activities

General &
Vertical Specific



App Repertoire

Discovery & Acquisition
Usage



Preferences

Top apps
Features
Notifications



Abandonment & Re-engagement

Reasons to stop
and re-start using
apps

| Key findings

01

The majority of shopping apps are used on a monthly basis [slide 17]

For shopping activities, mobile sites are used more than apps [slide 11]

02

03

Security is key - with sign in preferred [slide 28]

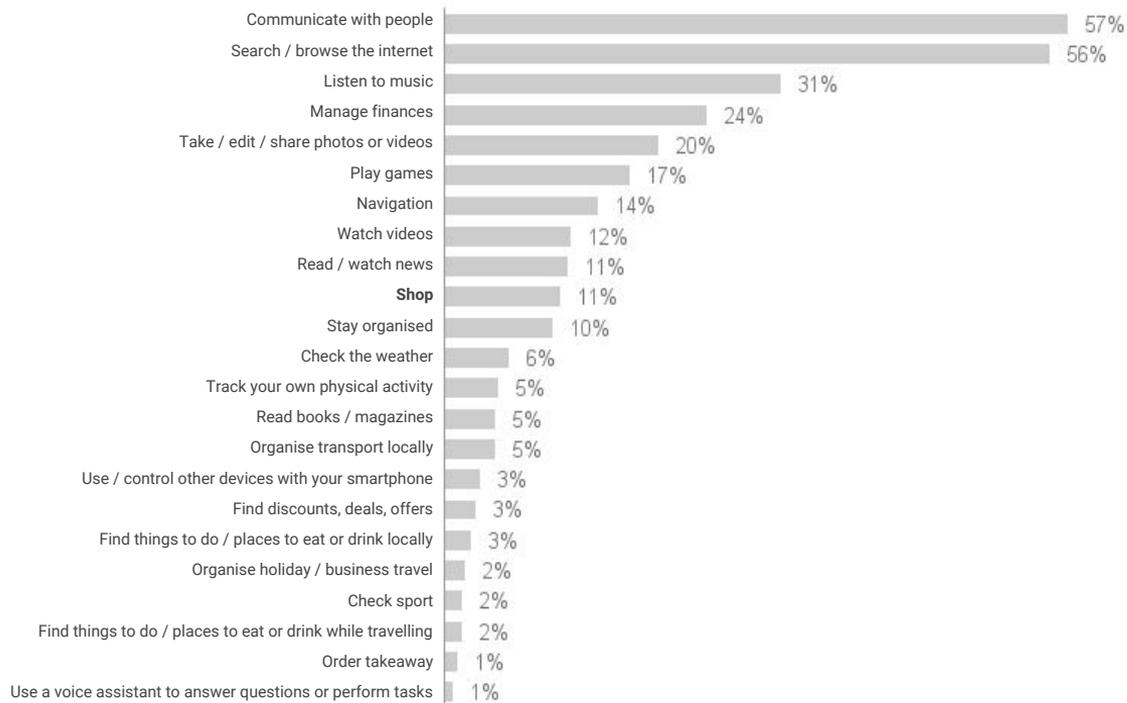
Discounts or exclusive offers can lead some to re-engage [slide 32]

04

| Smartphone activities

| Must have smartphone activities

Amongst those who use mobile for shopping activities



Base: 500

Q3. If you could only use your smartphone to do three of these activities from now on, which would you choose?

| Frequency of shopping on mobile

10%

At least **daily**

46%

At least **weekly**

| Types of purchases made on smartphone

Shopped for in past 30 days

58%



Clothes,
shoes &
accessories

28%



Skincare &
cosmetics

17%



Groceries

38%



Electronics

18%



Sports &
outdoor

16%



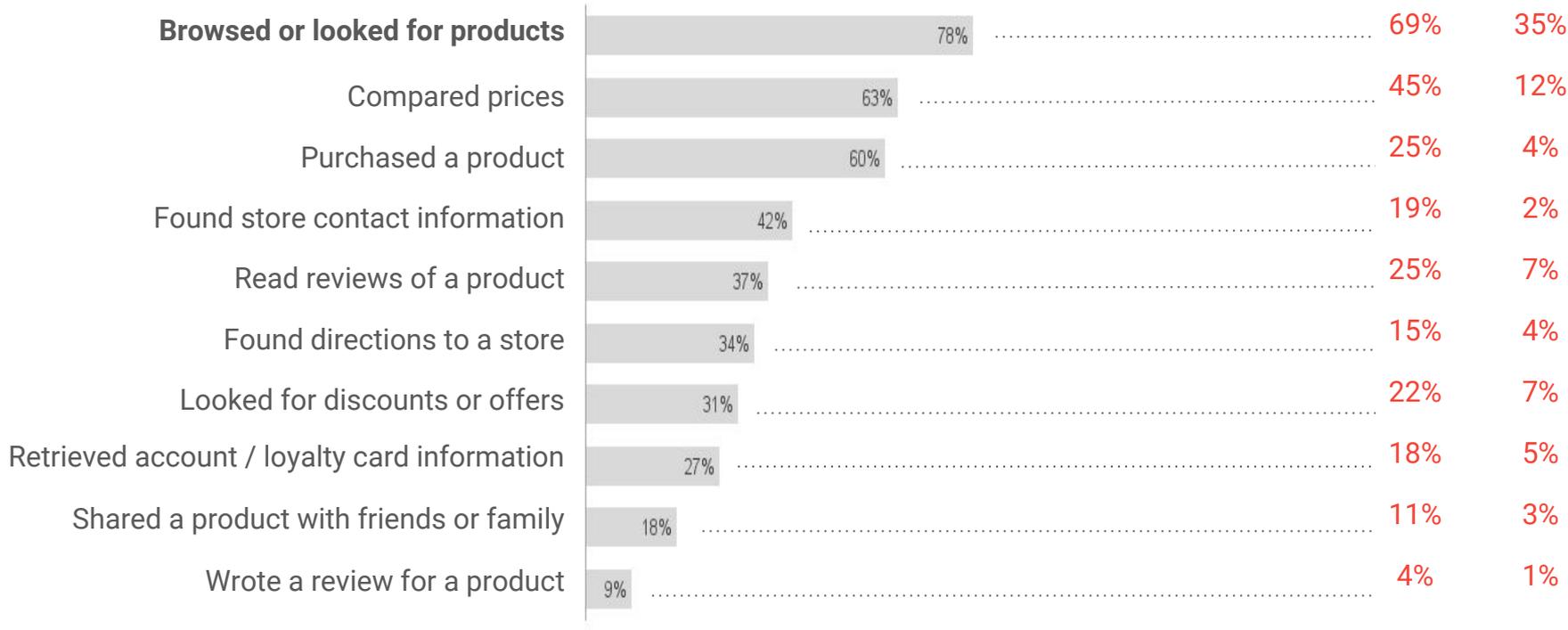
Home, garden
& DIY

Shopping activities on smartphone

Past 30 day activities

Weekly

Daily

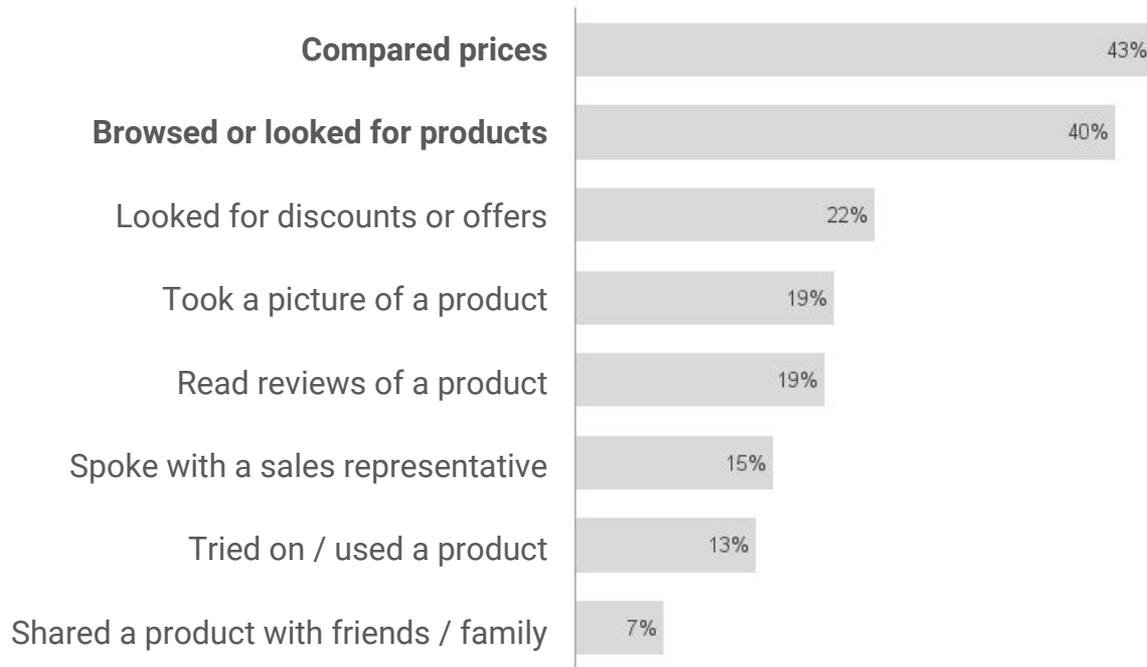


Smartphone activities while in a store

71%

Have done an activity in a store that led to a purchase on their smartphone

Past 30 day activities



Usage of apps and sites for shopping

Shopping in past 30 days

42%

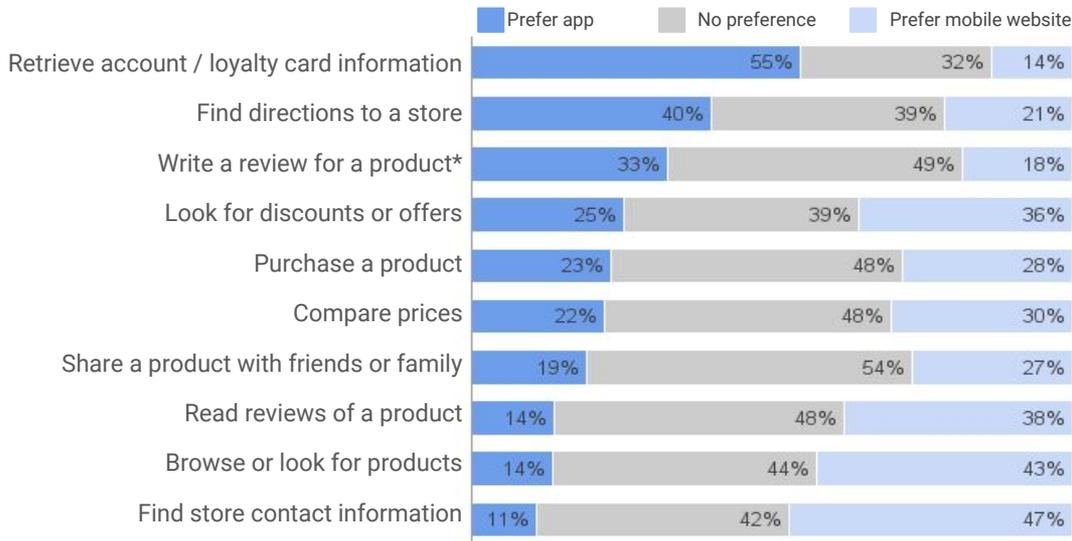
Used an app

63%

Used a mobile website

Preferences for top shopping activities

Among those who have done activity in past 30 days



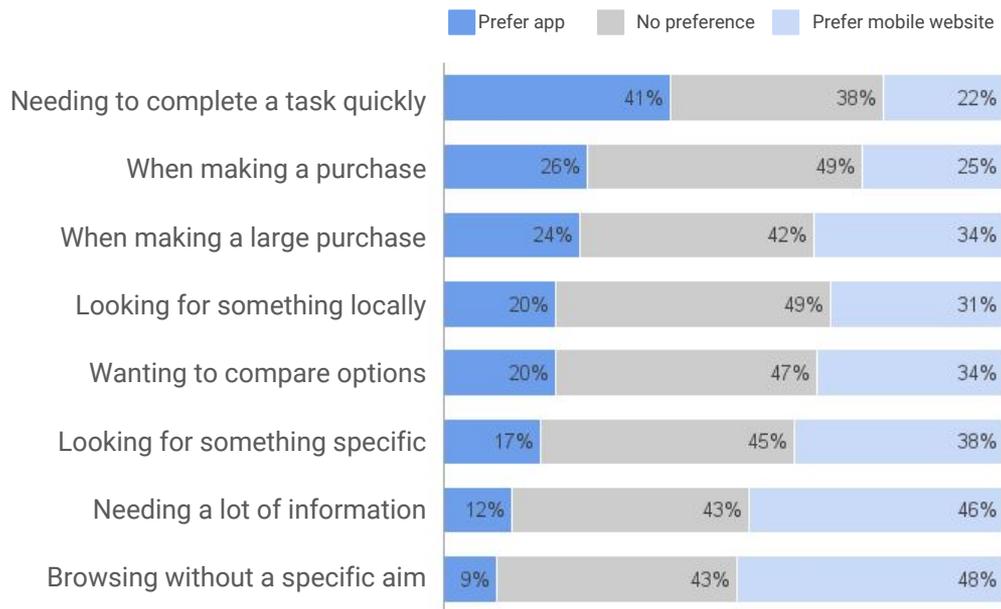
Base: 500

Q5. Have you used a mobile website or an app for each of these in the last 30 days? - Shop

Base: Have done the activity on smartphone in past 30 days (base above n=30 are shown)

Q11. Which of these activities would you prefer to use an app for and which would you prefer to use a mobile website for?

Platform preferences for shopping activities



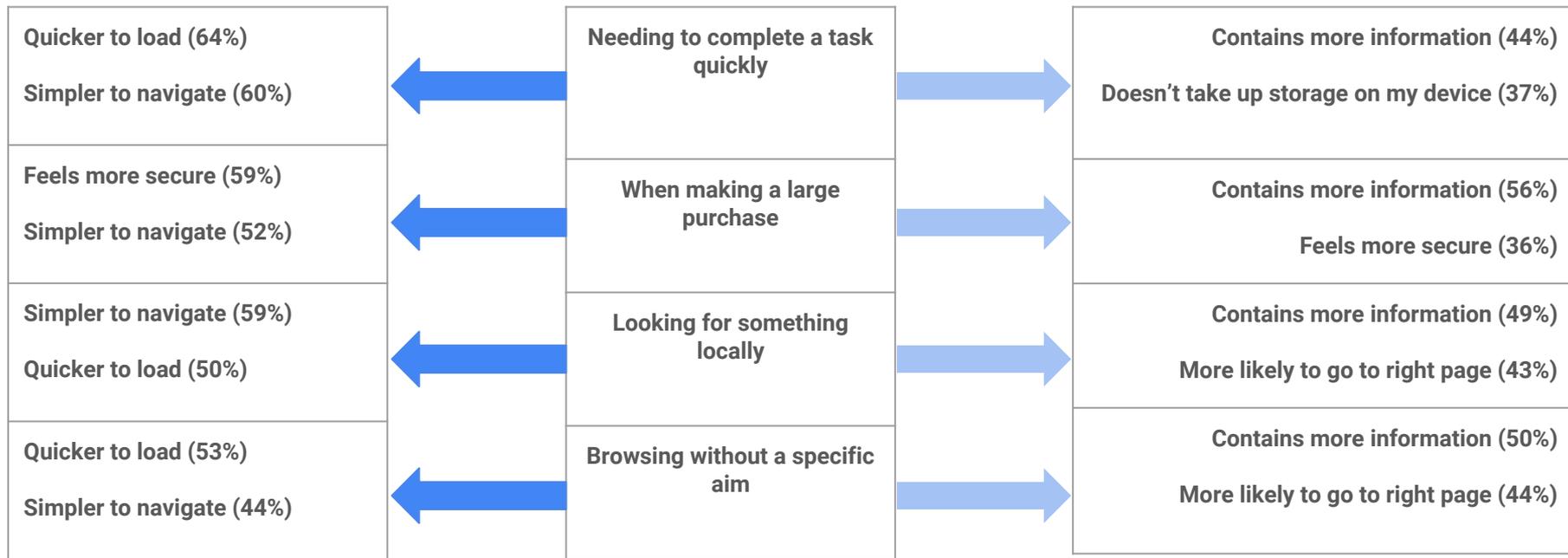
- Preference leans towards mobile sites over apps for most shopping activities.
- Mobile websites are especially preferred when needing information, whether broad or specific.
- Apps are only more preferred when there is an interest of time savings.

Top reasons for app vs mobile site preference

Top reasons app preferred

Situation

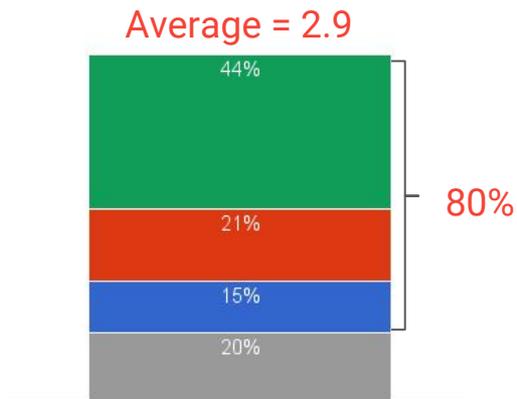
Top reasons mobile website preferred



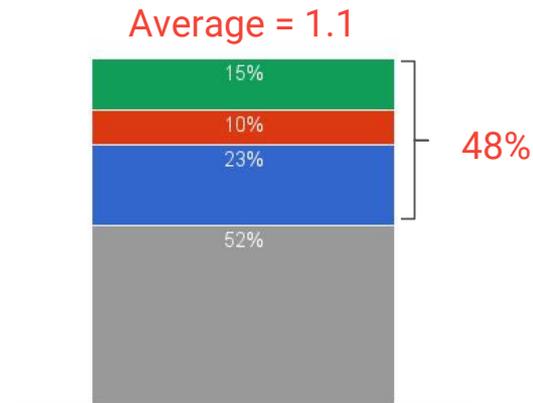
| App repertoire

Number of shopping apps installed

Currently installed



Installed past 3 months



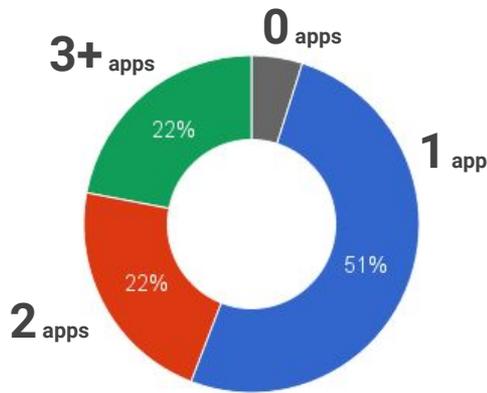
None One app Two apps Three or more apps

Base: 500
Q14. How many shopping apps are installed on your smartphone (including any that were already installed when you bought it)?
Q18. How many shopping apps have you installed on your smartphone in the past 3 months, including apps you've since uninstalled?

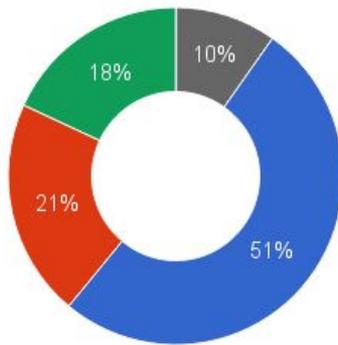
Lifecycle of new shopping apps

Among those who installed a shopping app in the past 3 months, an average of **2.3 apps were installed** in the past 3 months...

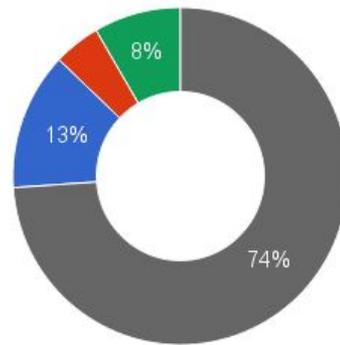
1.9 were ever opened
on average



1.6 were still in use
on average



0.6 were uninstalled
on average



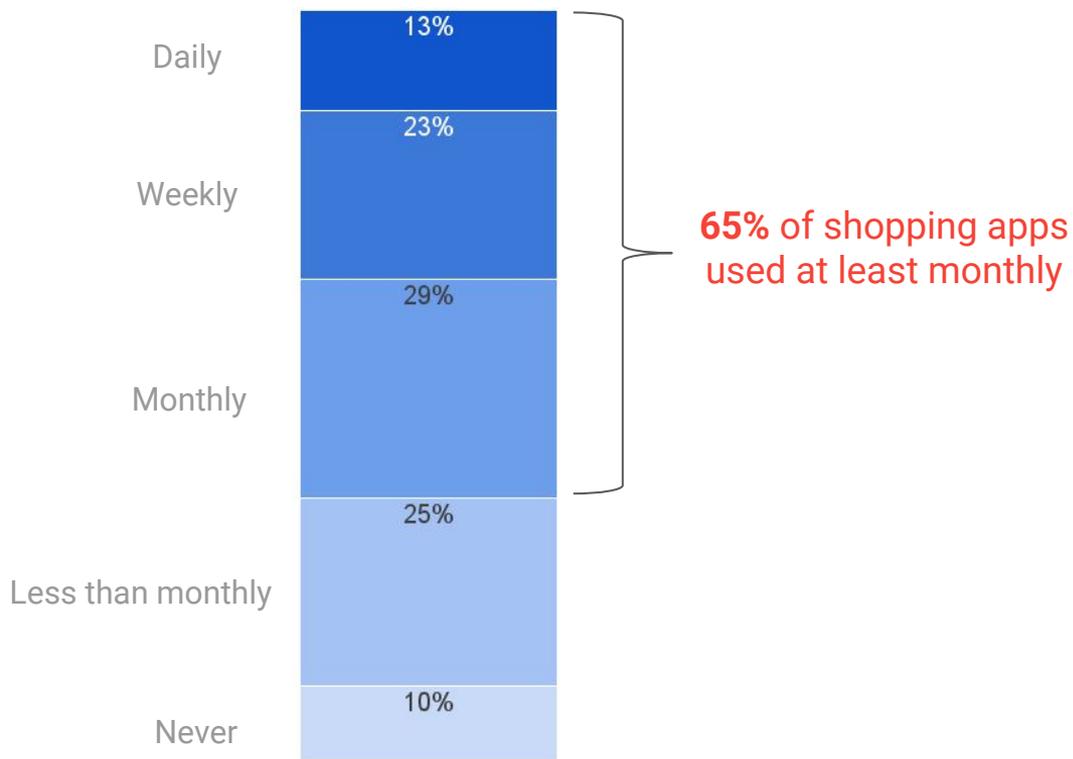
Base: Installed shopping app(s) in the past 3 months (n=253)

Q19. How many of those [VERTICAL] apps you've installed in the past 3 months have you opened at least once since installing?

Q20. How many of those [VERTICAL] apps you've installed in the past 3 months are you still using now?

Q21. How many of those [VERTICAL] apps you've installed in the past 3 months have you since removed?

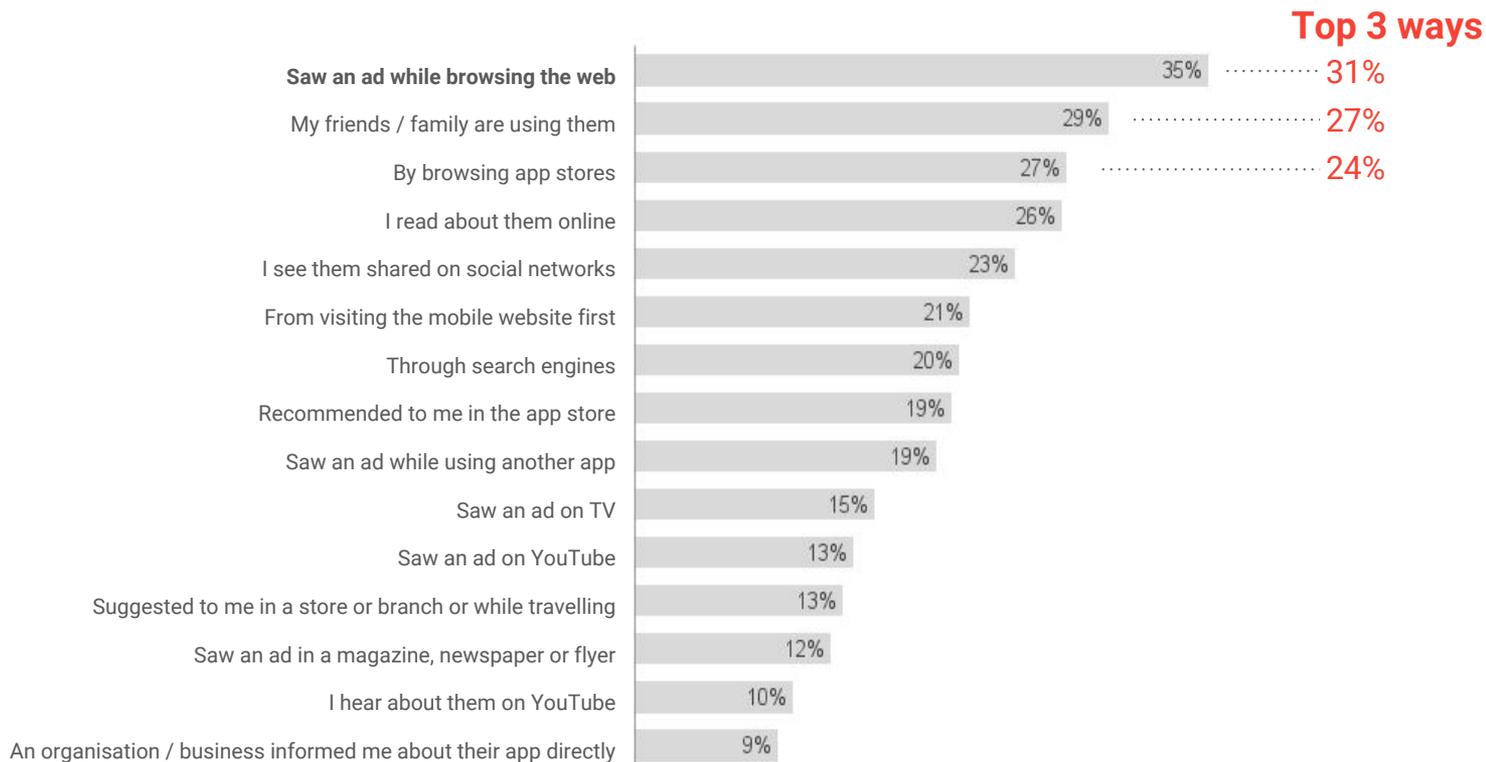
Average percentage of shopping apps used



Base: Has shopping apps installed on smartphone (n=404)

Q15. Roughly what percentage of the shopping apps are installed on your smartphone do you use...?

Ways to find out about shopping apps



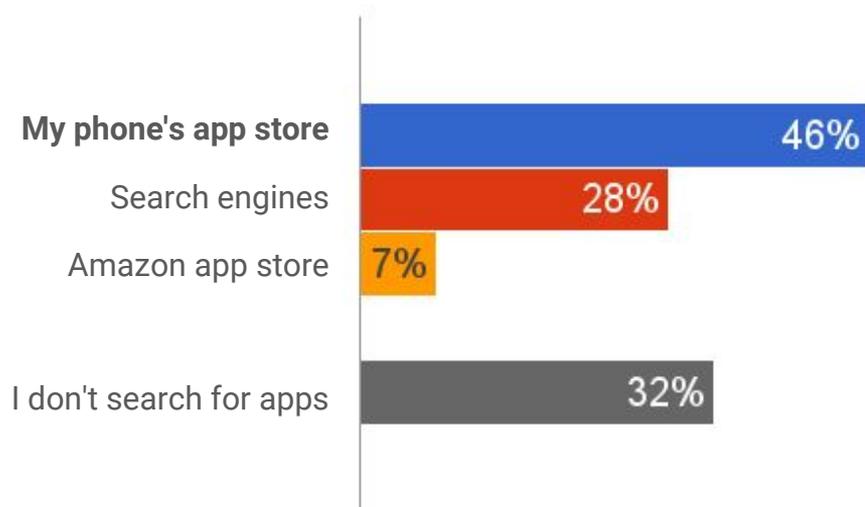
Base: 500

Q32. How do you typically find out about new shopping smartphone apps?

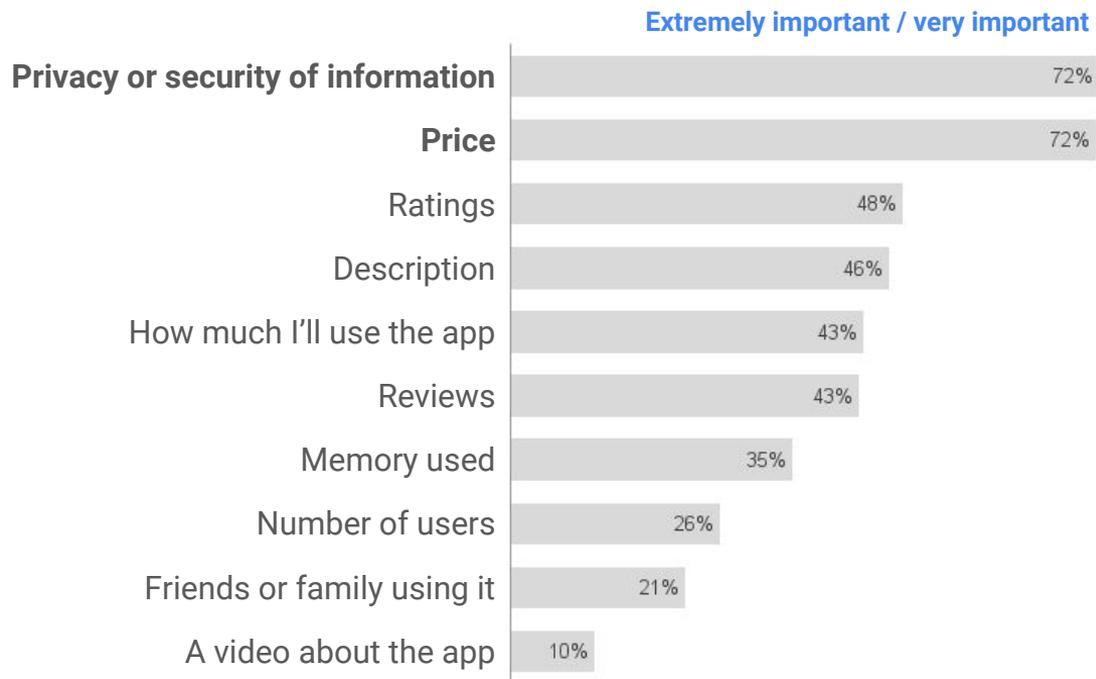
Q33. And have you found out about a shopping app in any of these ways?

Q34. What are the top 3 ways you find out about the shopping smartphone apps you use?

| Sources of finding shopping apps



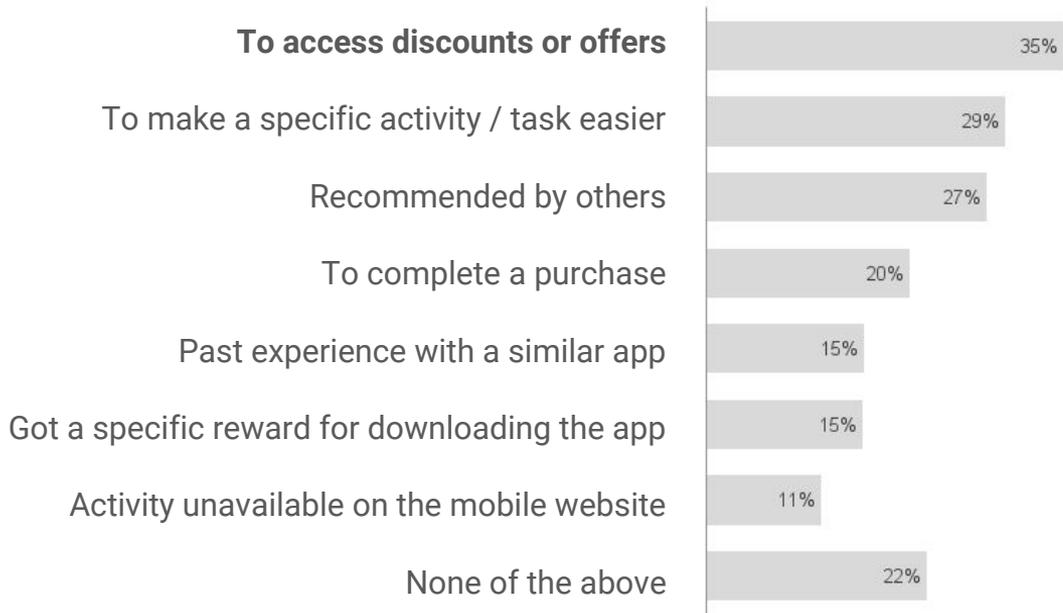
App store download decision factors



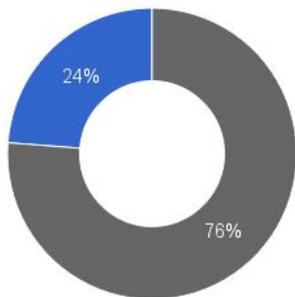
Base: Searches for apps on phone's app store (n=239)

Q38. When searching for shopping apps in your smartphone's app store, how important are the following factors when making a decision about which app(s) to download?

Reasons for downloading shopping apps



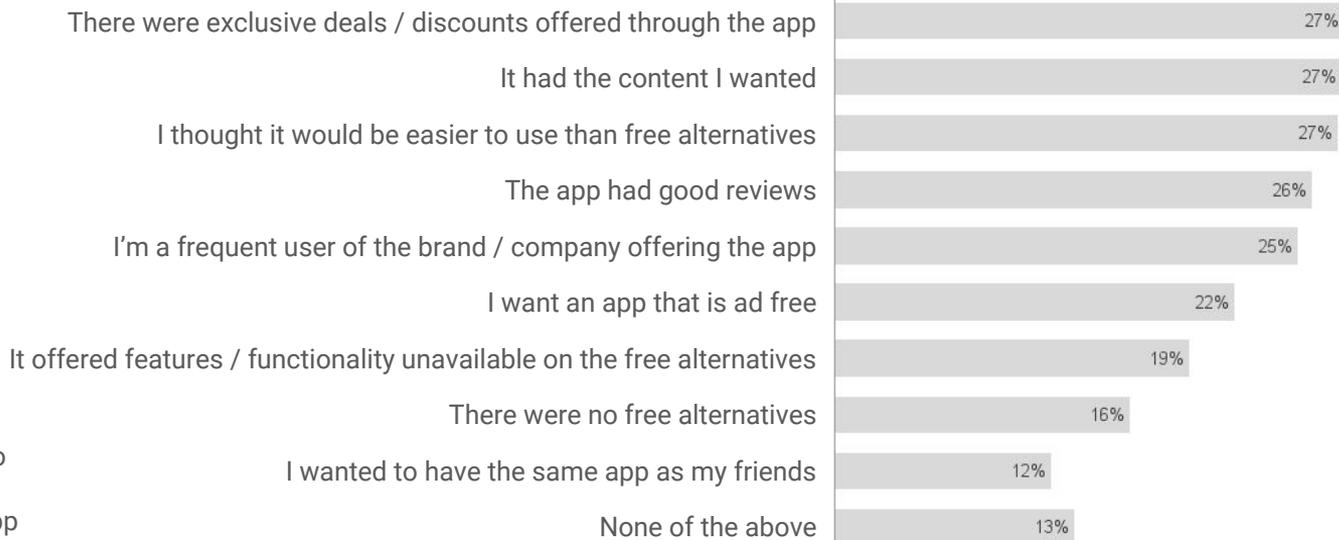
Reasons for paying for shopping apps



■ Never paid to download shopping app

■ Have paid to download shopping app

Reasons for paying



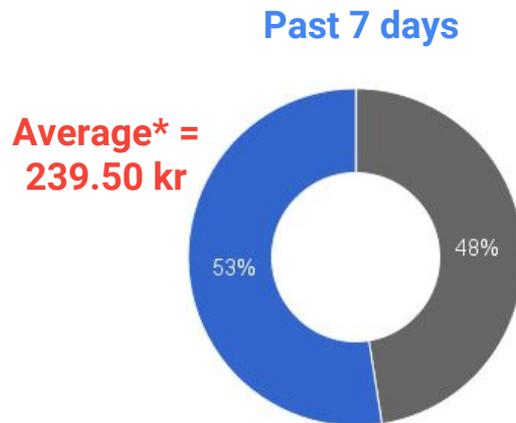
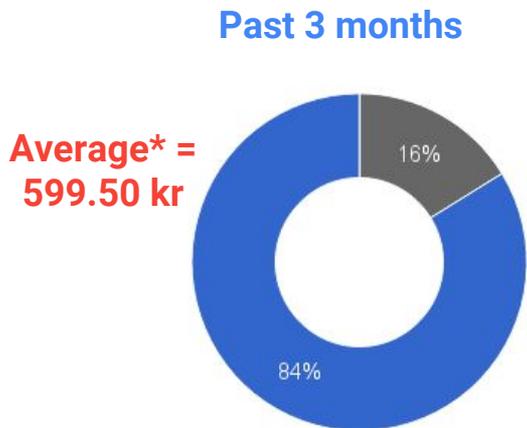
Base: 500 *Median

Q22. What is the most you have ever paid for a shopping app? Please enter amount to the nearest whole number.

Base: Have paid to download a shopping app (n=127)

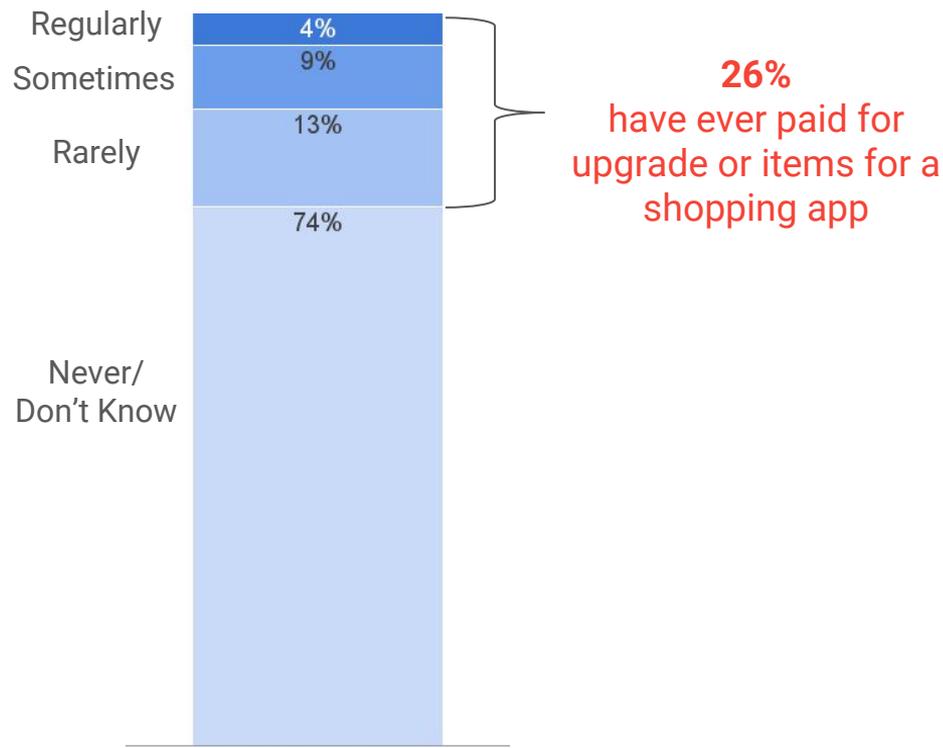
Q23. Why have you chosen to pay for shopping apps over other free alternatives?

Smartphone spending for products/services



■ Have not spent money ■ Spent money

Frequency of paying for app upgrades/items



| Preferences

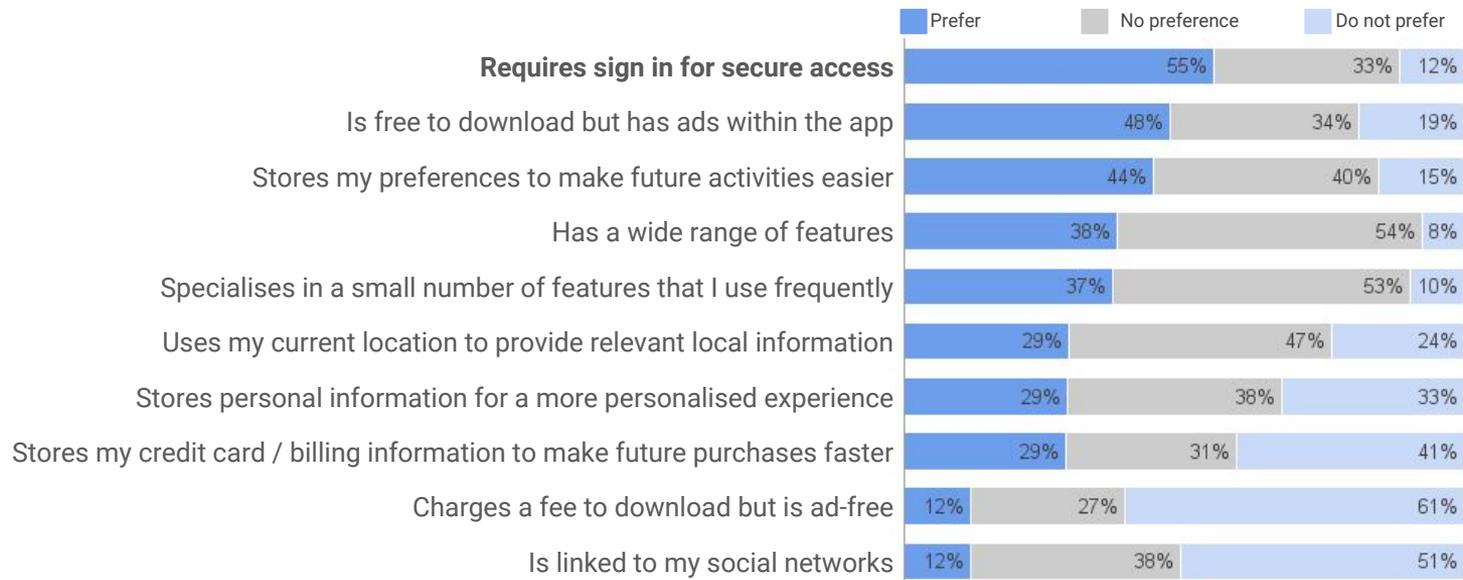
| Favourite shopping apps are...



Characteristics of favourite apps



Preferred features for shopping apps

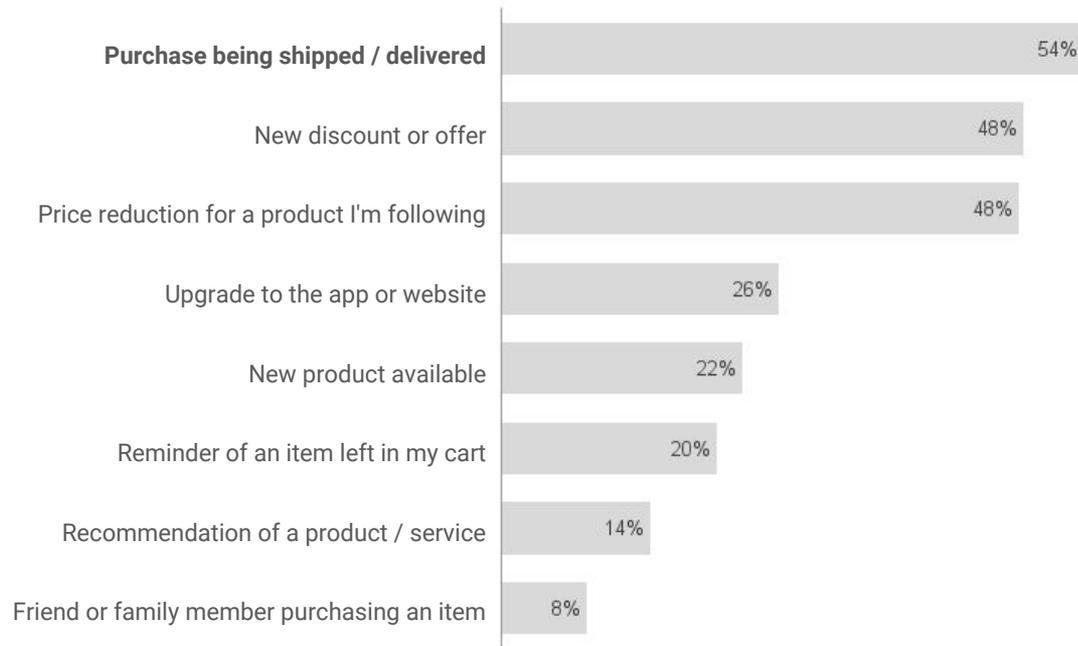


Useful notifications on phone

84%

find shopping
notifications on
mobile **useful**

Most useful notifications



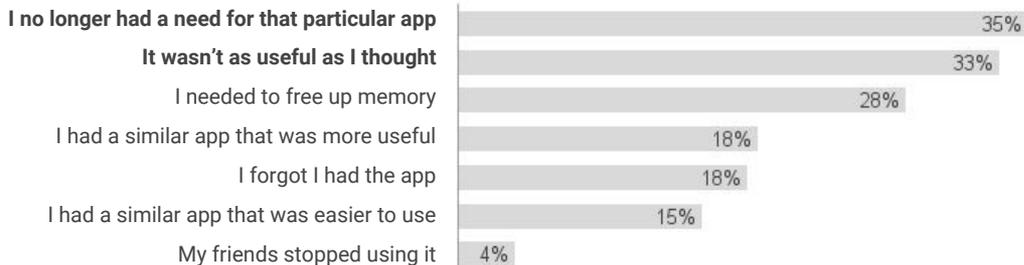
Base: 500

Q29. Apps or websites can give you notifications on your phone to tell you about a new update, message, or event, for example. What sort of shopping notifications do you find useful?

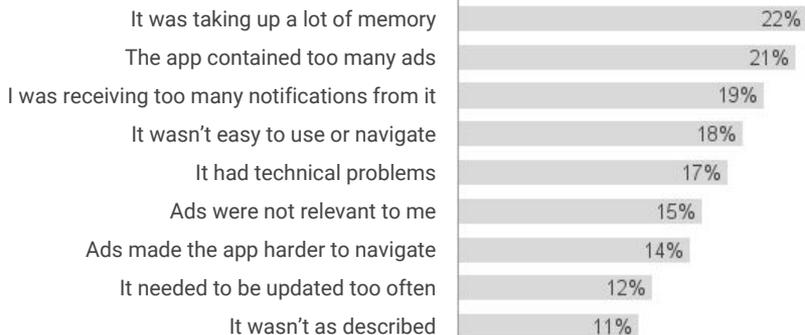
| Abandonment & re-engagement

Reasons for abandonment

Individual related



App related



Why no longer needed?

No longer interested in the brand/company
42%

Other apps covered shopping needs
42%

Was using for one-off purchase
35%

Base: 500

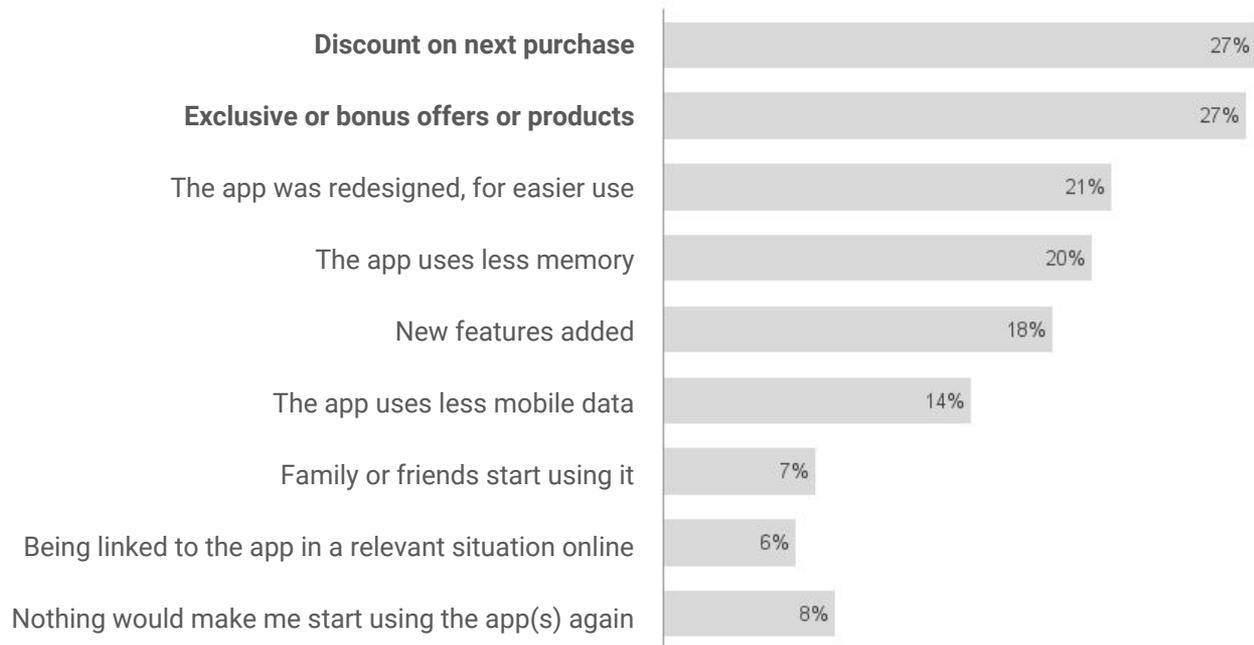
Q40. Have you stopped using shopping apps on your smartphone for any of the reasons below? Select all that apply.

Q41. And have you stopped using shopping apps on your smartphone for any of these reasons?

Base: No longer has need for a particular app (n=176)

Q42. You said you've stopped using shopping apps because you no longer had a need for it / them. Why did you no longer need it / them?

Reasons to re-engage



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