

# | Shopping on mobile / KSA

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)	KSA (also available for UK, US, CA, NL, TR, SE, FR, RU, IL)	

# | 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 monthly [slide 17]

For shopping activities, apps are preferred 2x more than mobile sites [slide 11]

## 02

## 03

Discounts or offers are preferred features of favourite apps and welcomed as notifications [slide 27, 29]

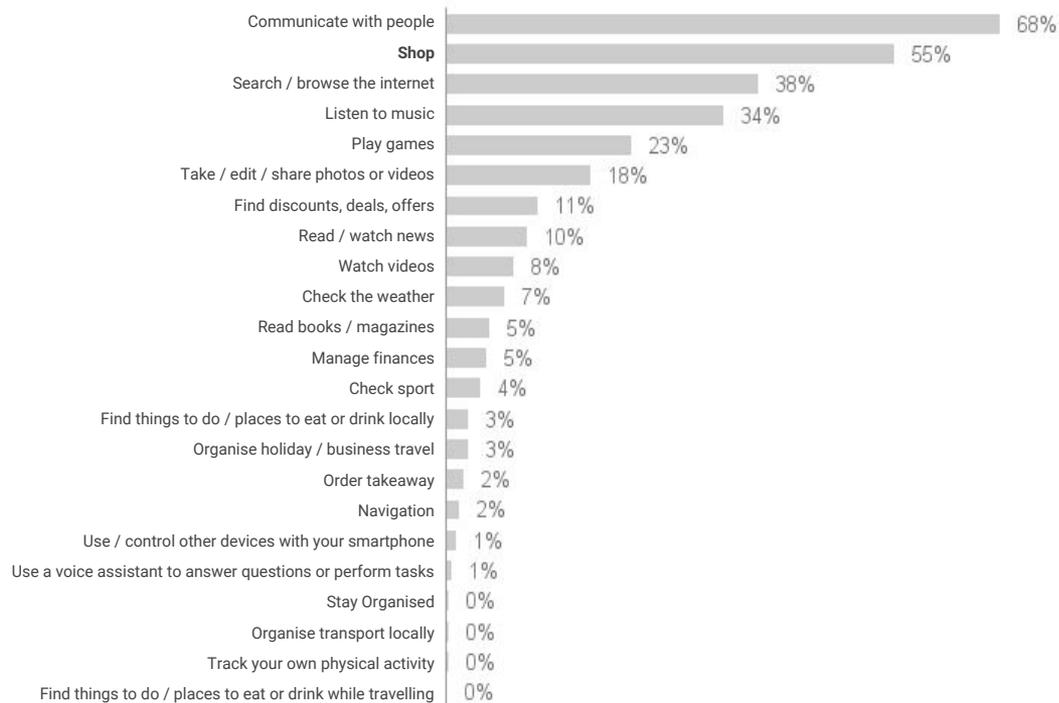
Friends abandoning an app is the top reason for discontinued use [slide 31]

## 04

# | Smartphone activities

# | Must have smartphone activities

Amongst those who use mobile for shopping activities



Base: 300

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

19%

At least **daily**

34%

At least **weekly**

# | Types of purchases made on smartphone

Shopped for in past 30 days

64%



Clothes,  
shoes &  
accessories

30%



Skincare &  
cosmetics

26%



Home, garden  
& DIY

40%



Electronics

30%



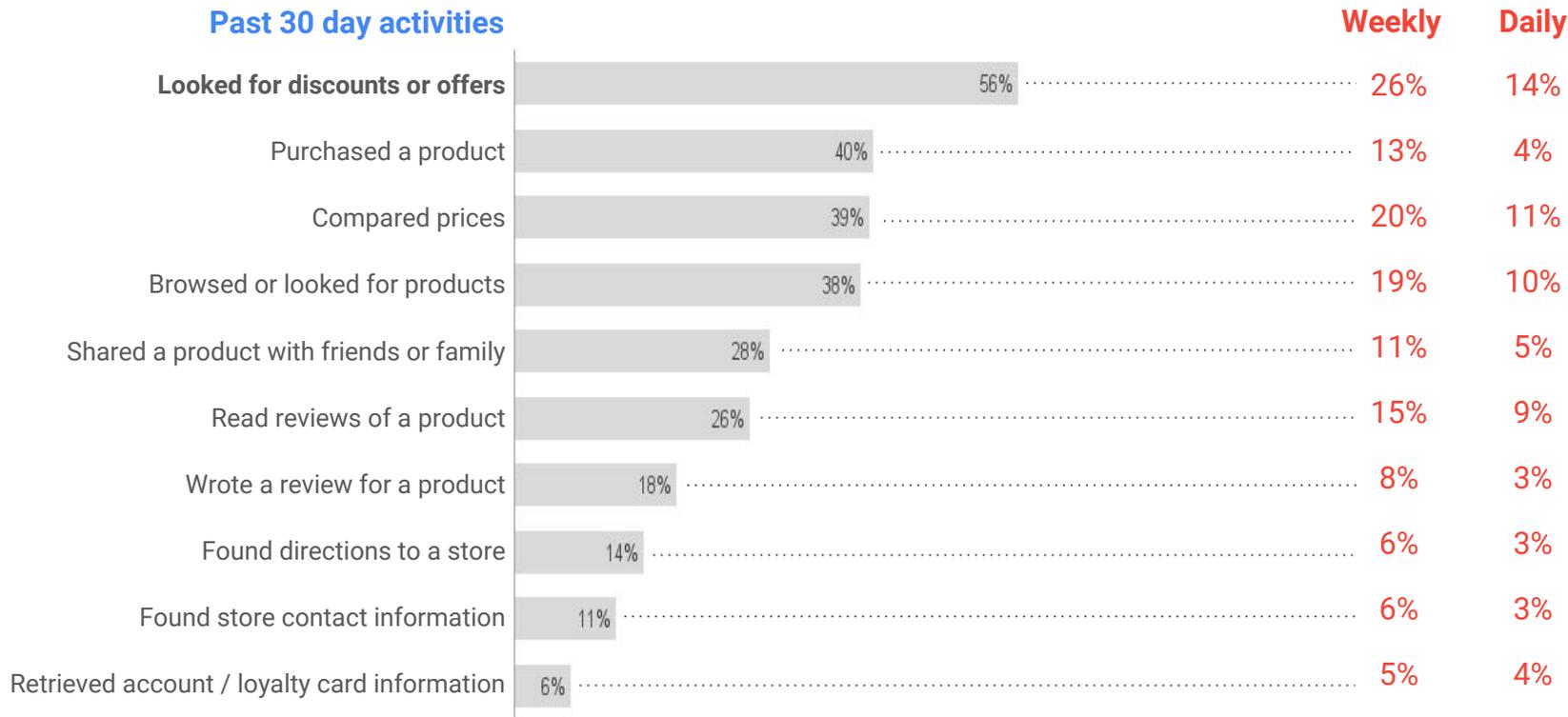
Sports &  
outdoor

17%



Groceries

# Shopping activities on smartphone



Base: 300  
Q8. Which of the following activities have you done on your smartphone in the past 30 days? (Using either a mobile website or an app)  
Q9. How often do you do each of the following activities on your smartphone?

# Smartphone activities while in a store

87%

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

71%

Used an app

33%

Used a mobile website

## Preferences for top shopping activities

Among those who have done activity in past 30 days



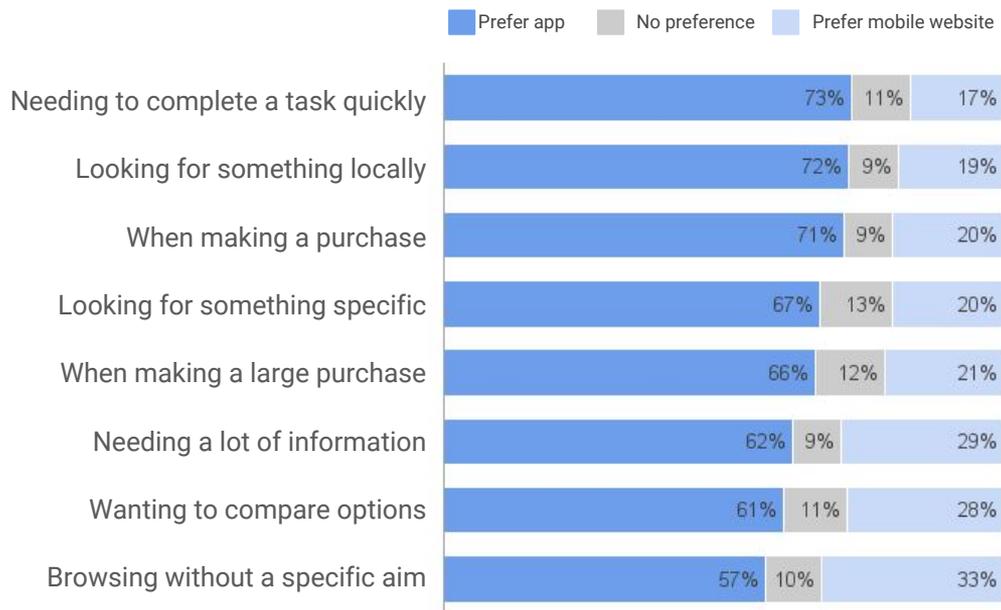
Base: 300

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) \*Small base under n=50.

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 situations



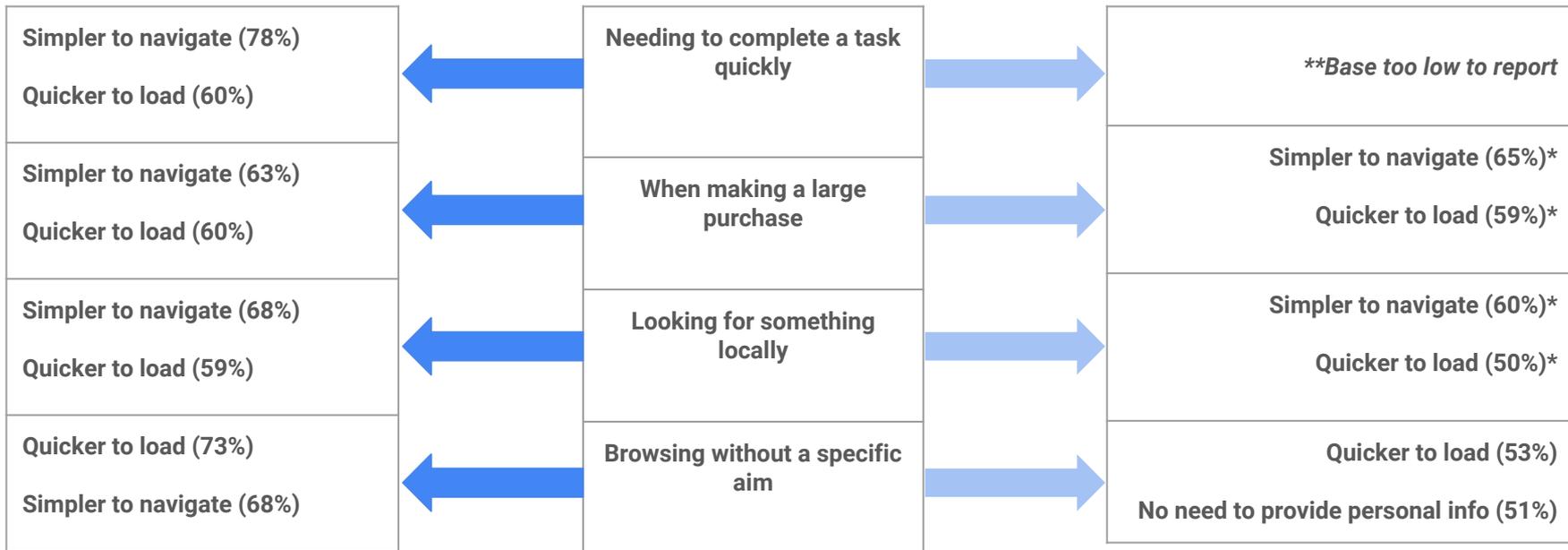
- Apps are preferred over mobile sites for all shopping situations.
- Top reasons apps are preferred for situations include being quick to load and simple to navigate (slide 13).

# Top reasons for app vs mobile site preference

## Top reasons app preferred

## Situation

## Top reasons mobile website preferred

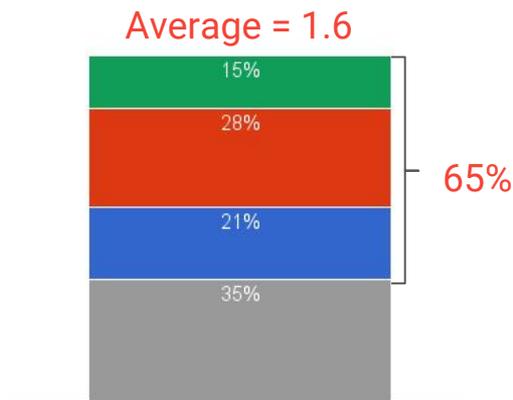


Base: Prefers app/mobile website for activity(base above n=30 are shown) \*Small base under n=50. \*\*Base too low to report, under N=30 Q13a/b. Why would you prefer to use an app when...?/ Why would you prefer to use a mobile site when...?

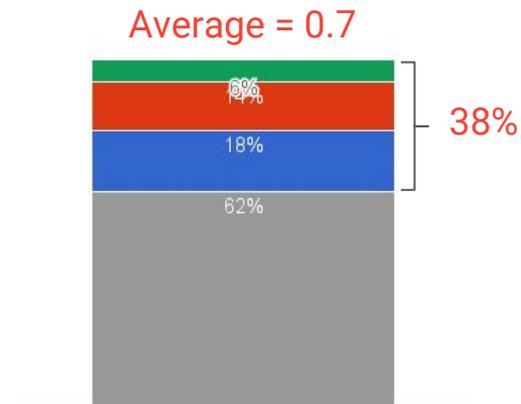
# | App repertoire

# Number of shopping apps installed

## Currently installed



## Installed past 3 months



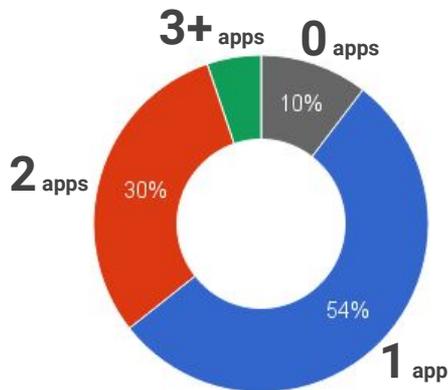
None One app Two apps Three or more apps

Base: 300  
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?

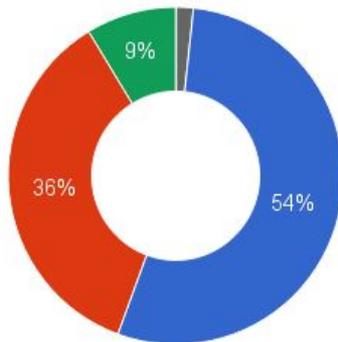
# Lifecycle of new shopping apps

Among those who installed a shopping app in the past 3 months, an average of **2.0 apps were installed** in the past 3 months...

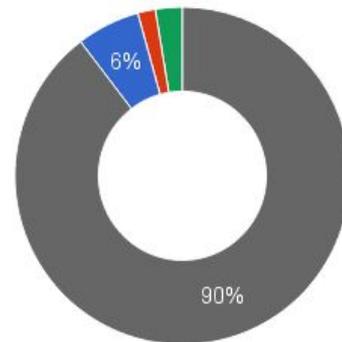
**1.4 were ever opened**  
on average



**1.6 were still in use**  
on average



**0.2 was uninstalled**  
on average



Base: Installed shopping app(s) in the past 3 months (n=115)

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

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

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

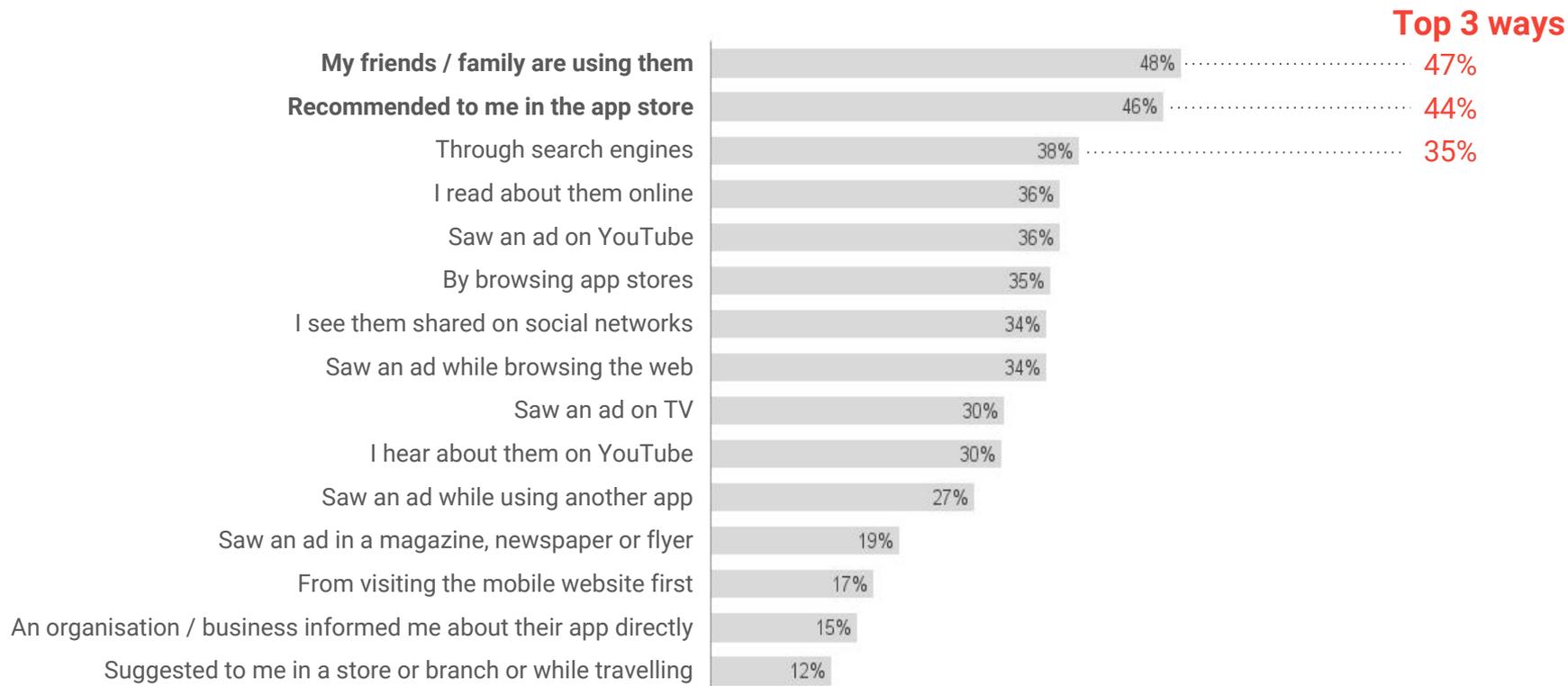
# Average percentage of shopping apps used



Base: Has shopping apps installed on smartphone (n=194)

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

# Ways to find out about shopping apps



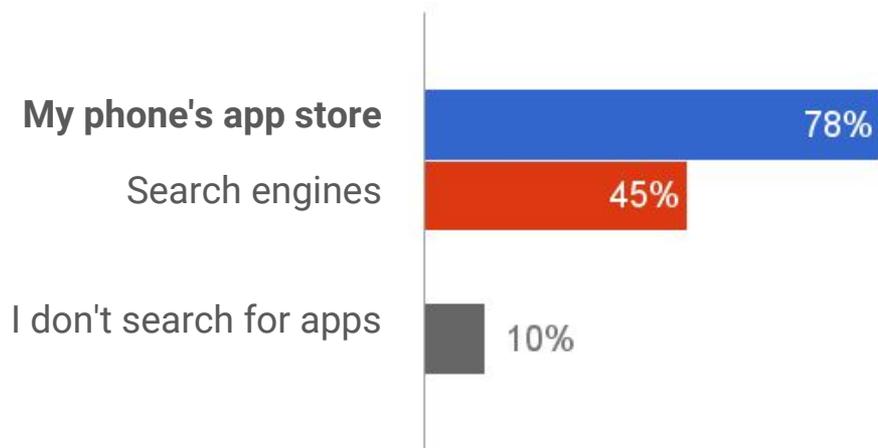
Base: 300

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

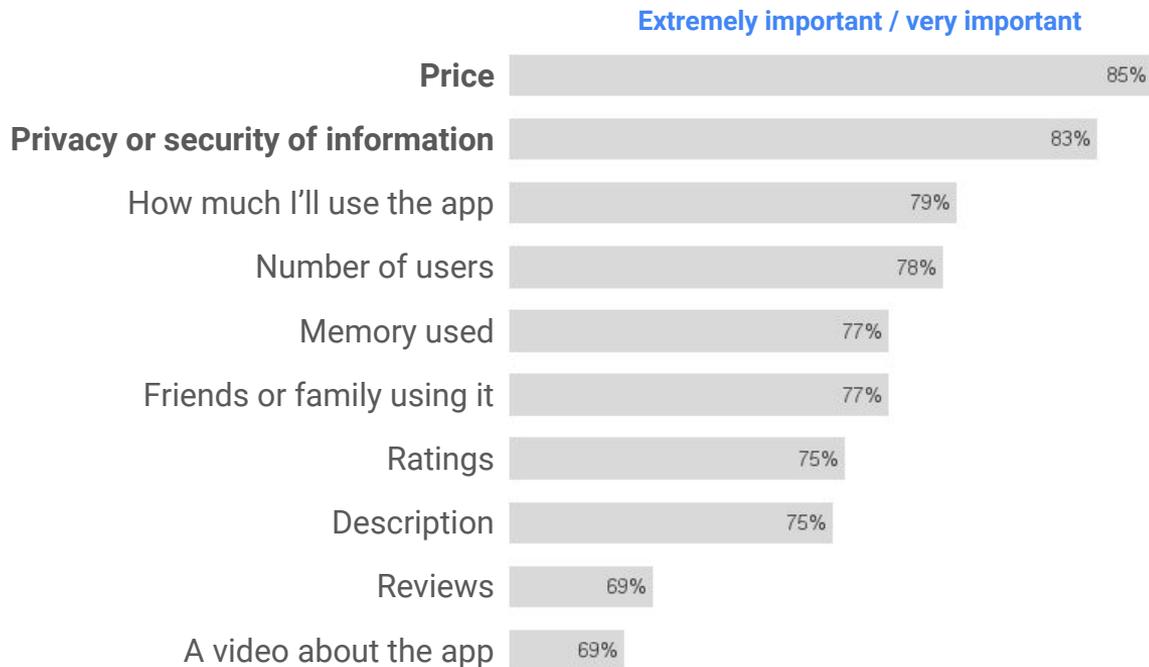
Q33. And have you found out about a shopping app in any of these ways?

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=235)

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?

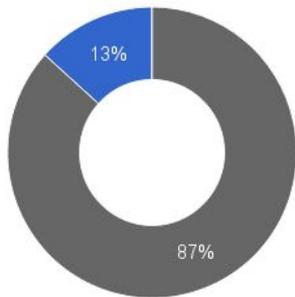
# Reasons for downloading shopping apps



Base: 300

Q35. For which of these reasons have you downloaded a shopping app in the past? Select all that apply.

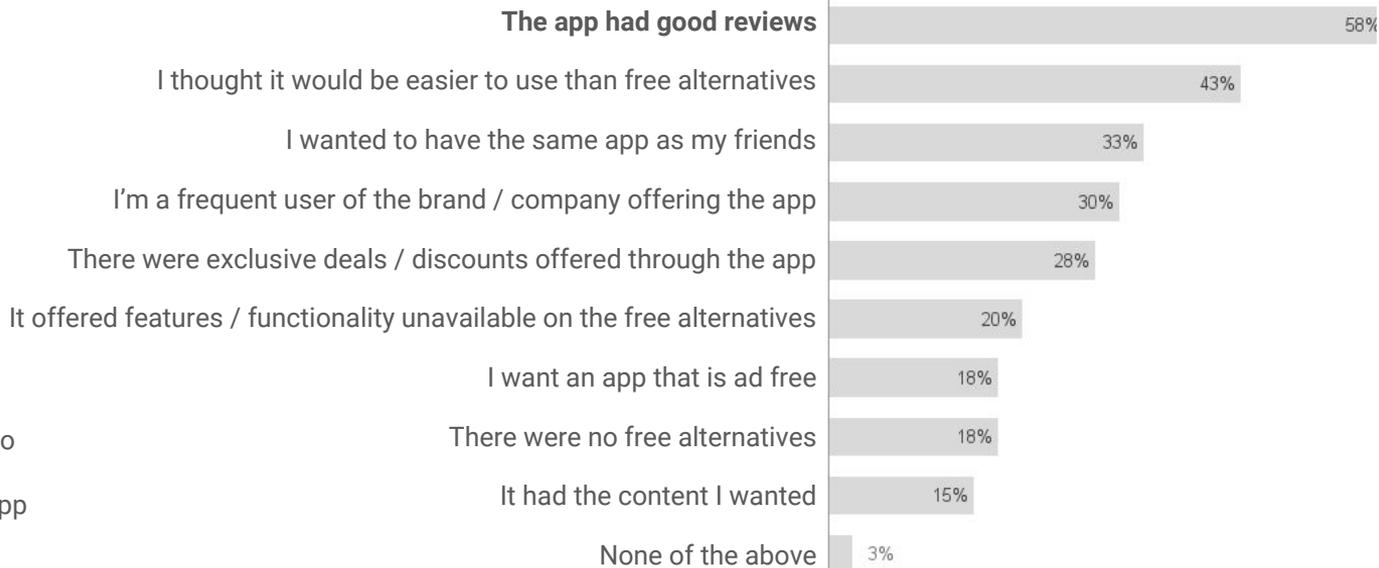
# Reasons for paying for shopping apps



Never paid to download shopping app

Have paid to download shopping app

## Reasons for paying



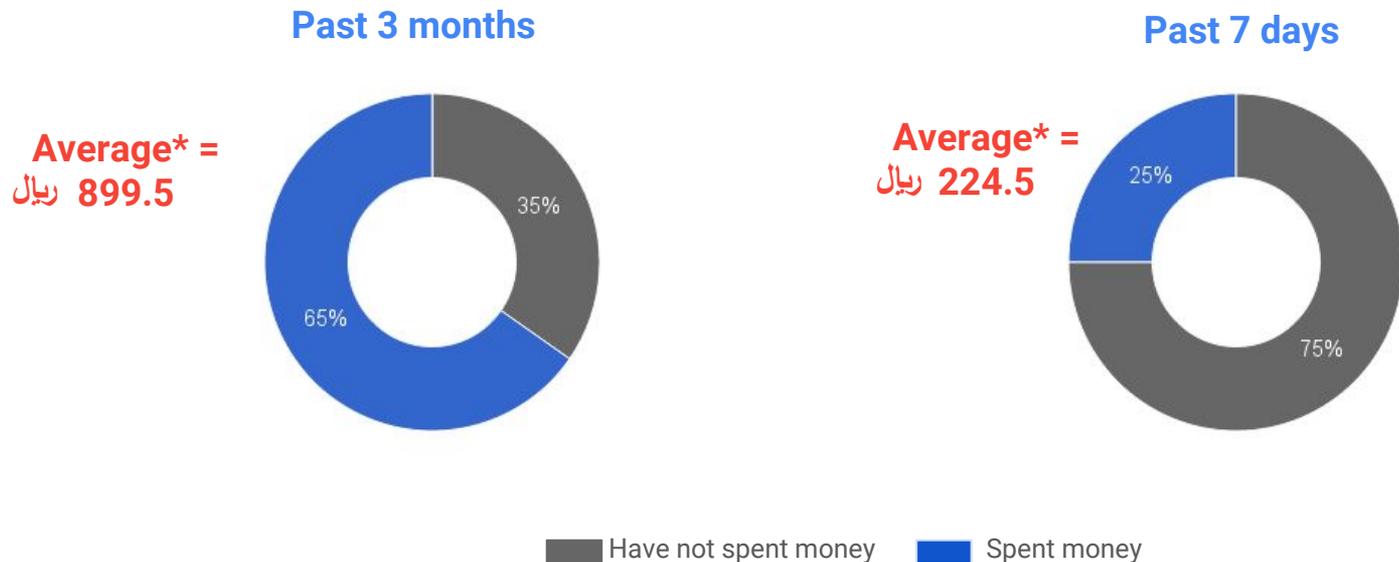
Base: 300 \*Median

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=40)

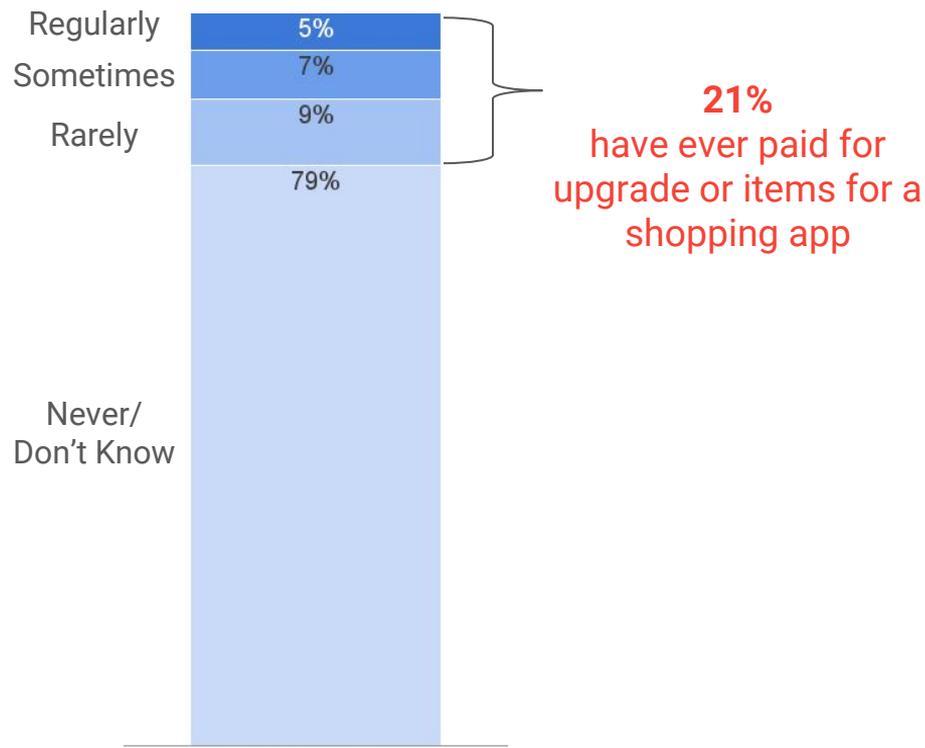
Q23. Why have you chosen to pay for shopping apps over other free alternatives?

# Smartphone spending for products/services



Base: 300 \*Median  
Q24a. Roughly how much have you spent while shopping on your smartphone in the past in the past 3 months?  
Q24a\_1. Roughly how much have you spent while shopping on your smartphone in the past 7 days?

# Frequency of paying for app upgrades/items



# | Preferences

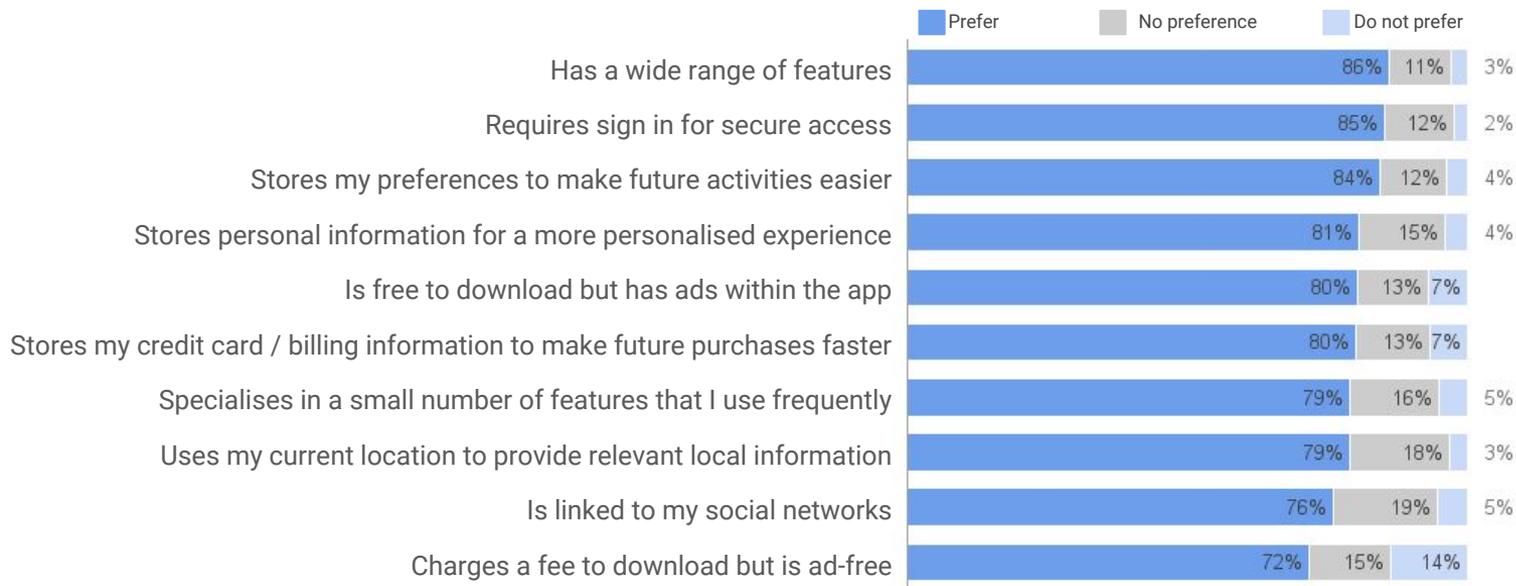
# | Favourite shopping apps are...



# | Characteristics of favourite apps



# Preferred features for shopping apps

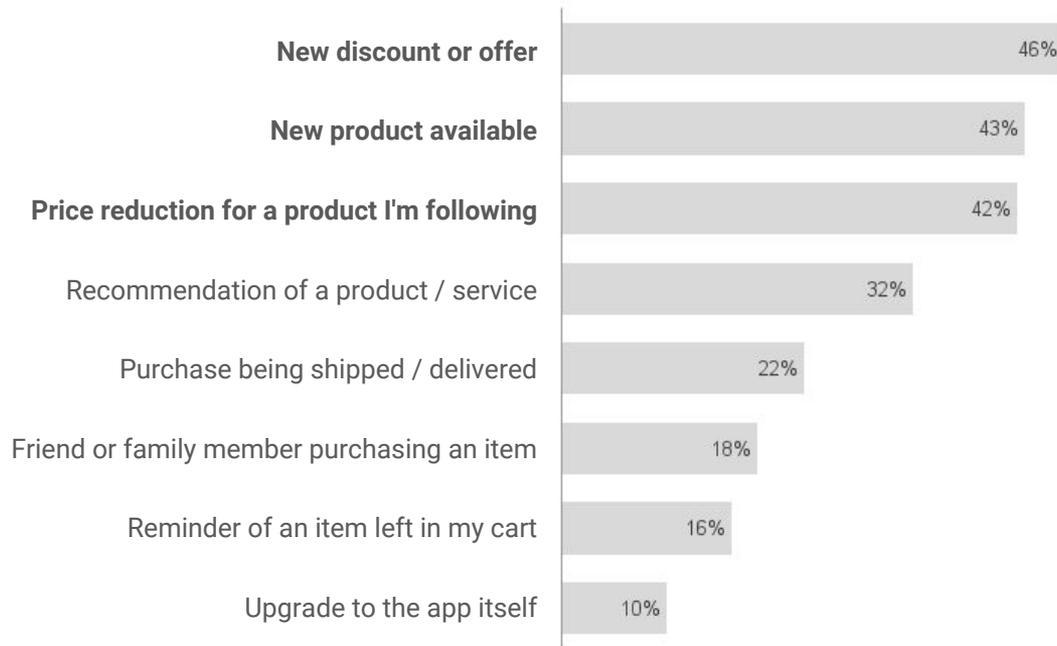


# Useful notifications on phone

71%

find shopping  
notifications on  
mobile **useful**

## Most useful notifications



Base: 300

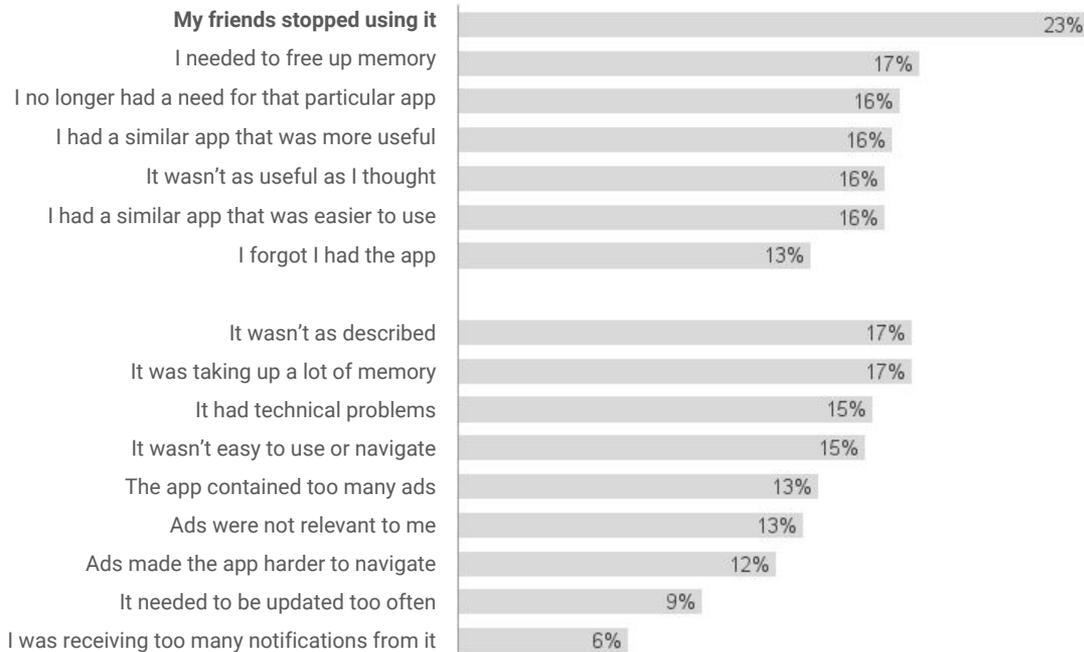
Q29. Apps or websites can give you notifications on your phone to tell you about a new update, message, or event, for example. What sort of shopping notifications do you find useful?

# | Abandonment & re-engagement

# Reasons for abandonment

Individual related

App related



Why no longer needed?

Other apps covered shopping needs  
67%

Was using for one-off purchase  
51%

No longer interested in the brand/company  
45%

Base: 300

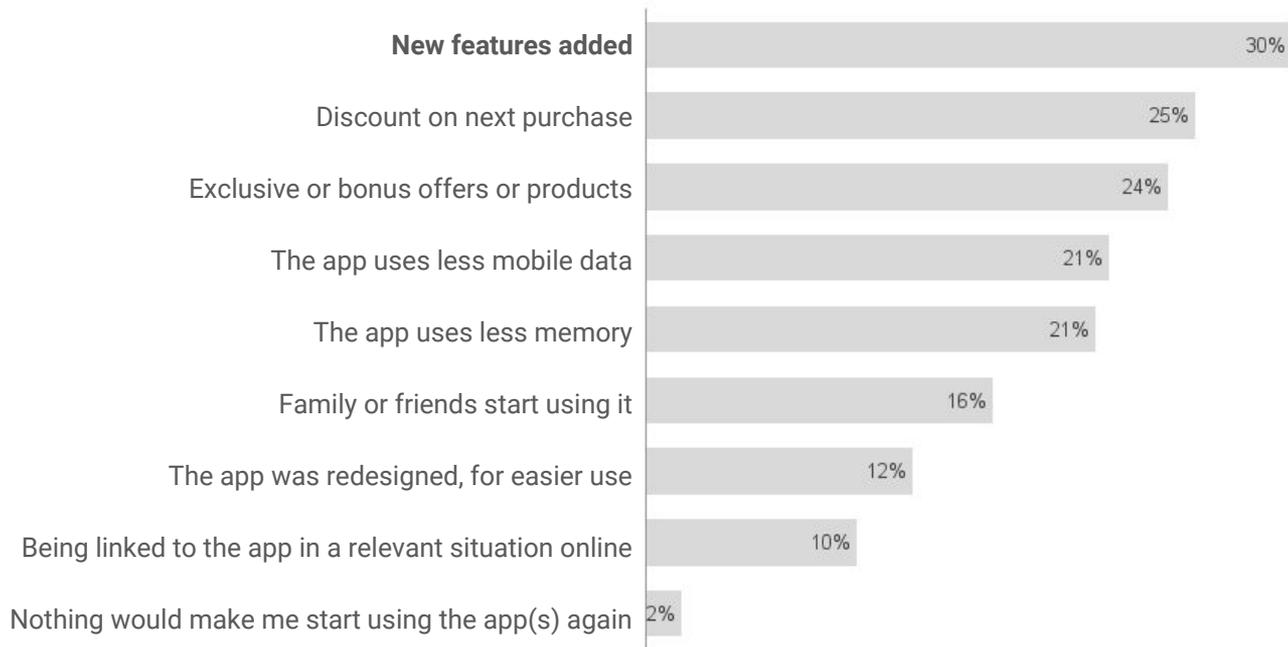
Q40. Have you stopped using shopping apps on your smartphone for any of the reasons below? Select all that apply.

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=49)

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



# | Shopping on mobile / KSA

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