Shopping on mobile / RU

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. 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.
Sample Size	N = 300 per vertical
Market(s)	RU (also available for UK, US, CA, NL, TR, SE, FR, IL, KSA)

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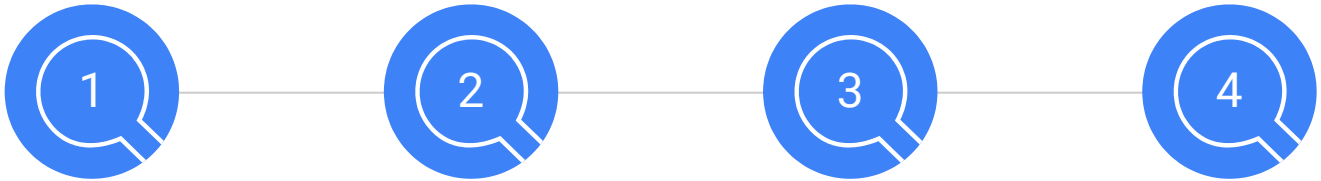


Smartphone Activities

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

About half of shopping apps are used on a weekly basis [slide 17]

02

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

03

Features are key - with stored preferences and sign in preferred
[slide 28]

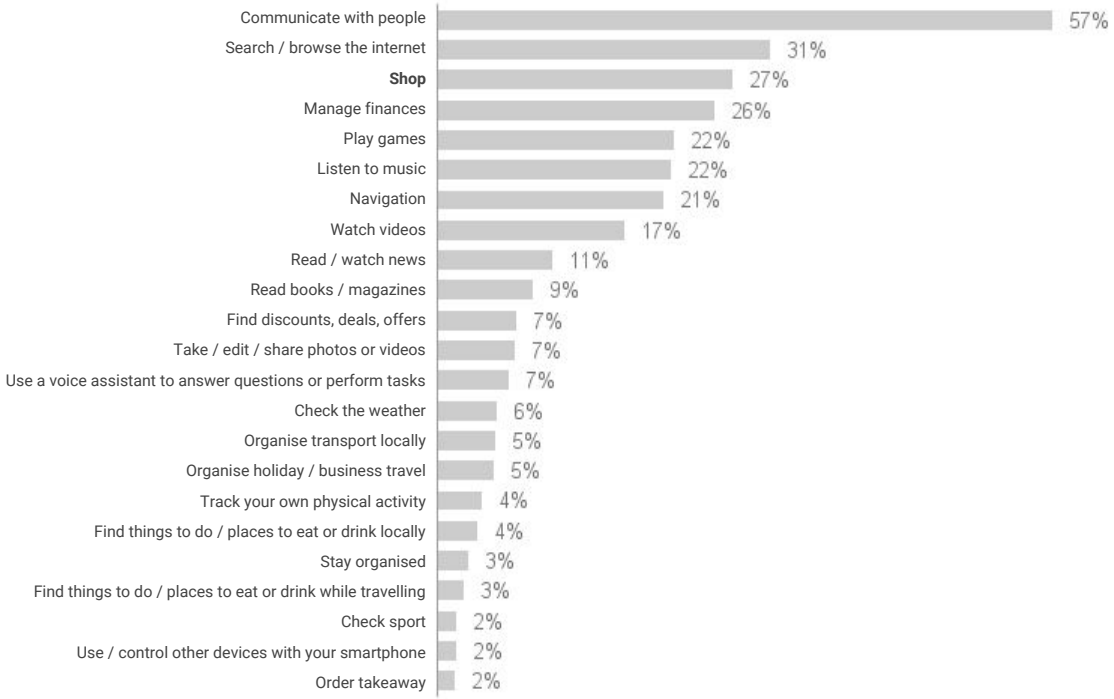
04

New features, exclusive offers or discounts can lead some to re-engage
[slide 32]

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?

Google

Frequency of shopping on mobile

24%

At least **daily**

59%

At least **weekly**

Base: 300
Q4. You've said you use your smartphone to do the following activities. How often do you do these on your smartphone? - Shop

Google

Types of purchases made on smartphone

Shopped for in past 30 days

56%

Clothes, shoes & accessories

48%

Electronics

35%

Skincare & cosmetics

28%

Groceries

26%

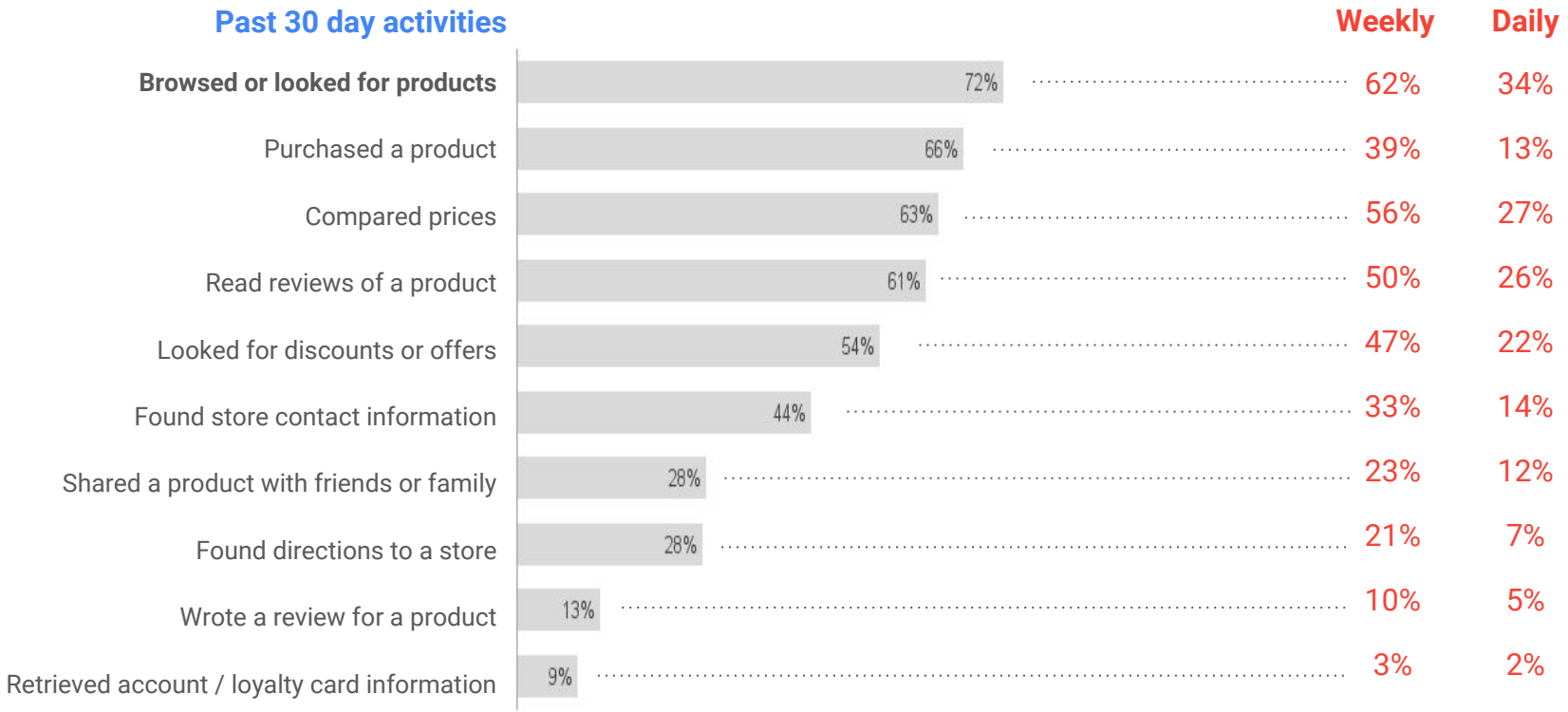
Sports & outdoor

22%

Home, garden & DIY

Base: 300
Q7. Which of the following have you shopped for in the last 30 days? (Using either a mobile website or an app)

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?

Google

Smartphone activities while in a store

97%

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

Base: 300
Q10. Which of the following activities done while in a store have led you to make a purchase on your smartphone in the past 30 days? (Using either a mobile website or an app)

Google

Usage of apps and sites for shopping

Shopping in past 30 days

56%

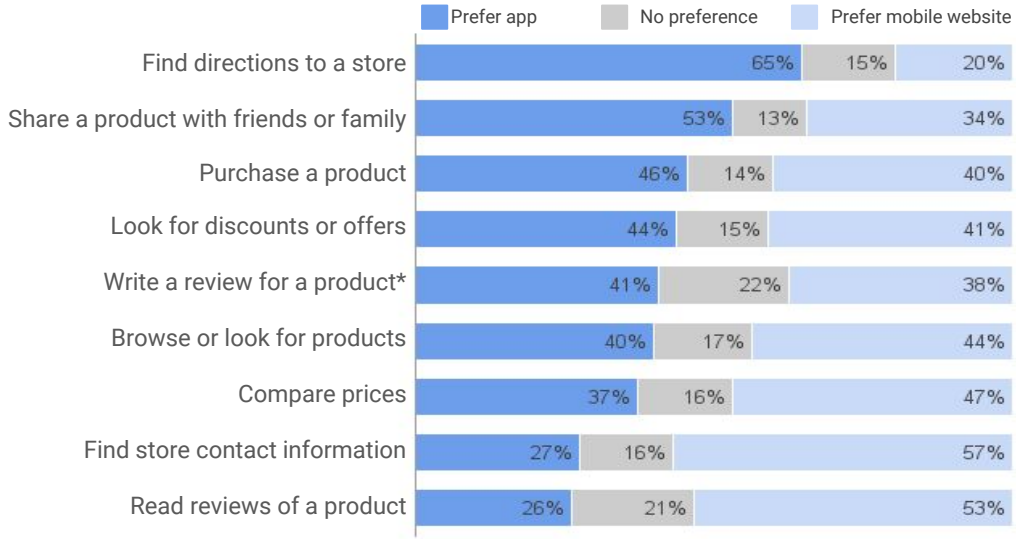
Used an app

51%

Used a mobile website

Preferences for top shopping activities

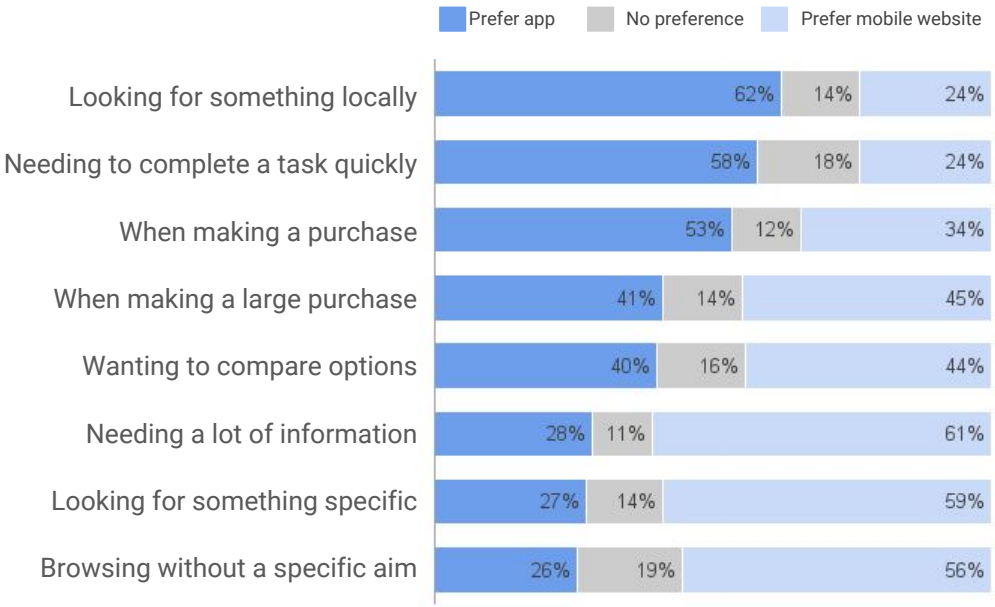
Among those who have done activity in past 30 days



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

Google

Platform preferences for shopping activities

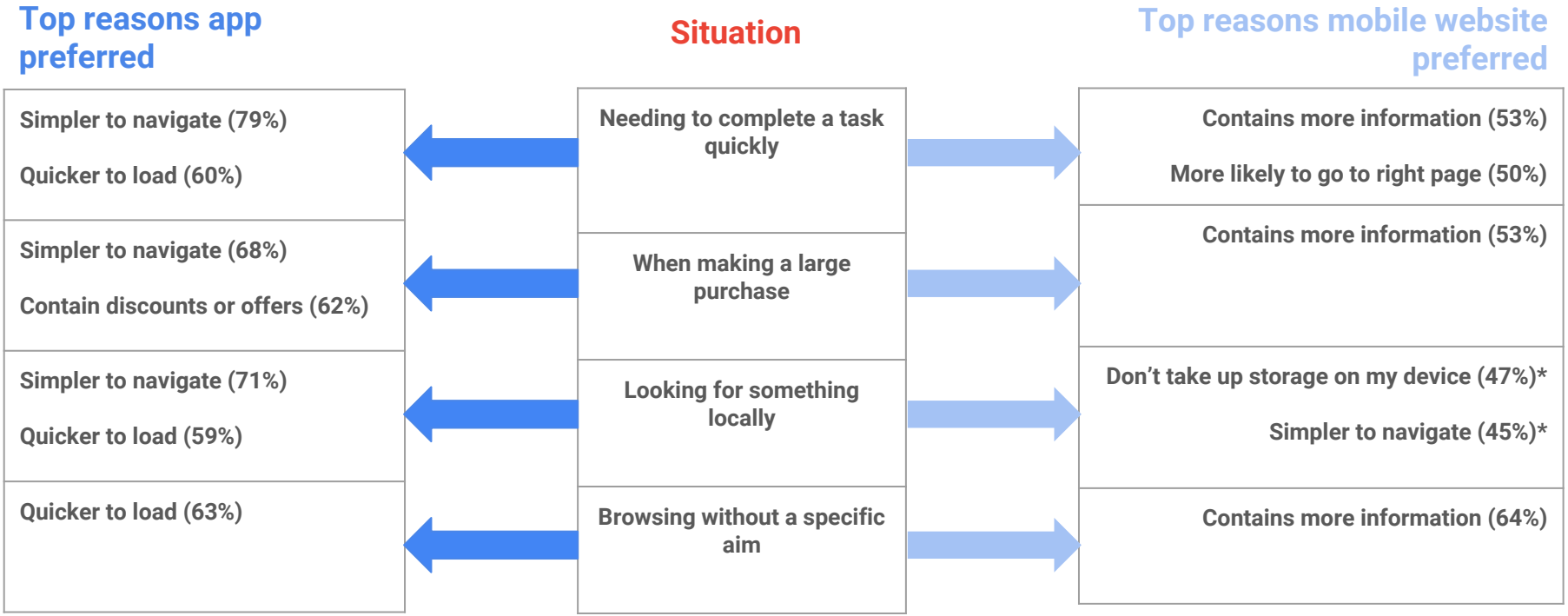


- Apps are strongly preferred for local, quick tasks, and purchases.
- Mobile websites are preferred for research - such as browsing with or without a specific aim and needing a lot of information.

Base: 300
Q12. Imagine you were in each of the following situations. Would you prefer to use a Shopping app, a mobile website or would you have no preference?

Google

Top reasons for app vs mobile site preference

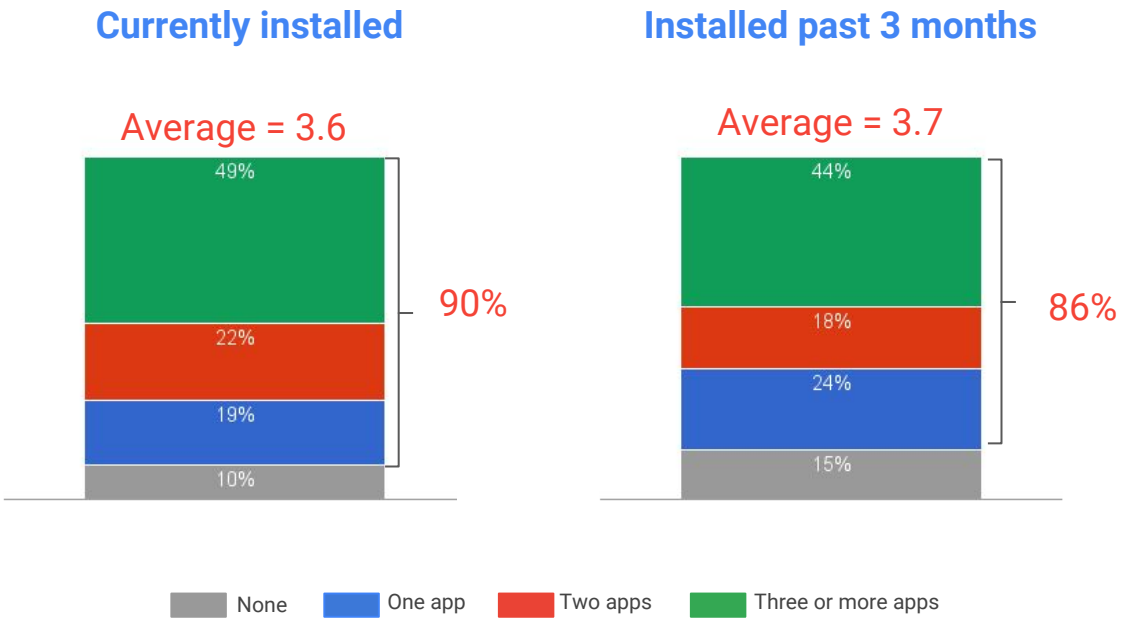


Base: Prefers app/mobile website for activity (base above n=30 are shown)
Q13a/b. Why would you prefer to use an app when…?/ Why would you prefer to use a mobile site when…?

Google

App repertoire

Number of shopping apps installed



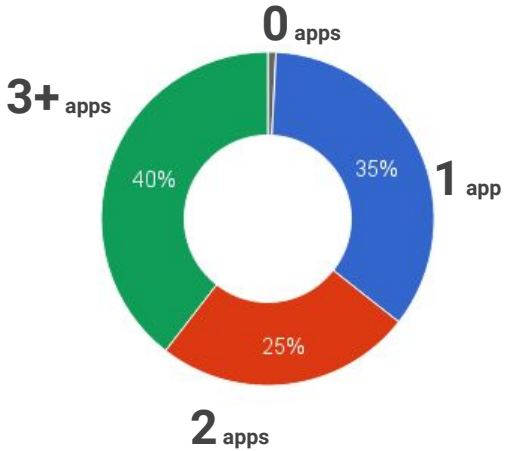
Base: 300
Q14. How many shopping apps are installed on your smartphone (including any that were already installed when you bought it)?
Q18. How many shopping apps have you installed on your smartphone in the past 3 months, including apps you've since uninstalled?

Google

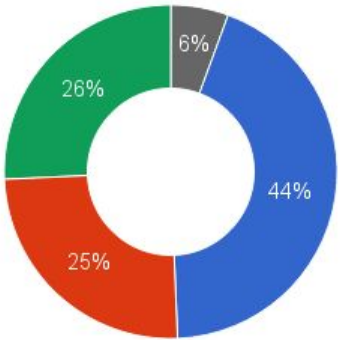
Lifecycle of new shopping apps

Among those who installed a shopping app in the past 3 months, an average of **4.4 apps were installed** in the past 3 months...

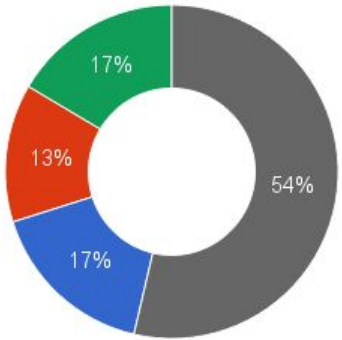
3.5 were ever opened
on average



2.7 were still in use
on average



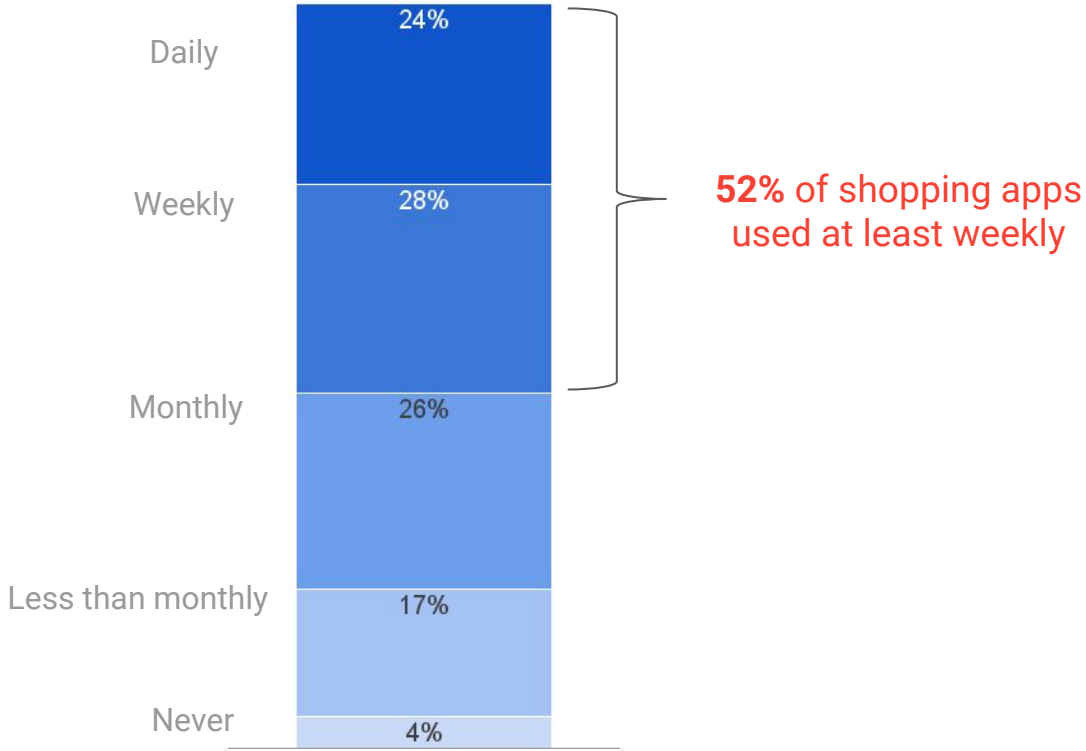
2.0 were uninstalled
on average



Base: Installed shopping app(s) in the past 3 months (n=256)
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?

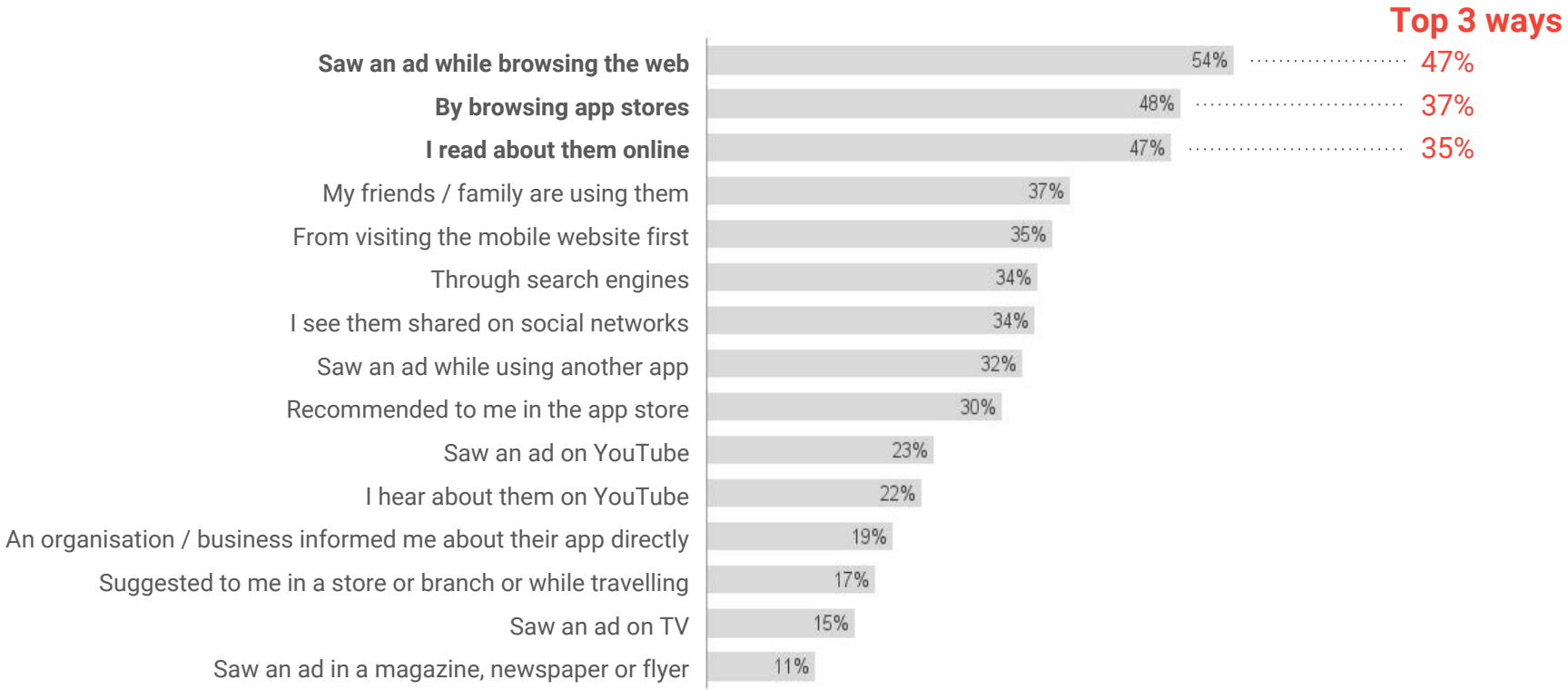
Google

Average percentage of shopping apps used



Base: Has shopping apps installed on smartphone (n=268)
Q15. Roughly what percentage of the shopping apps are installed on your smartphone do you use...?

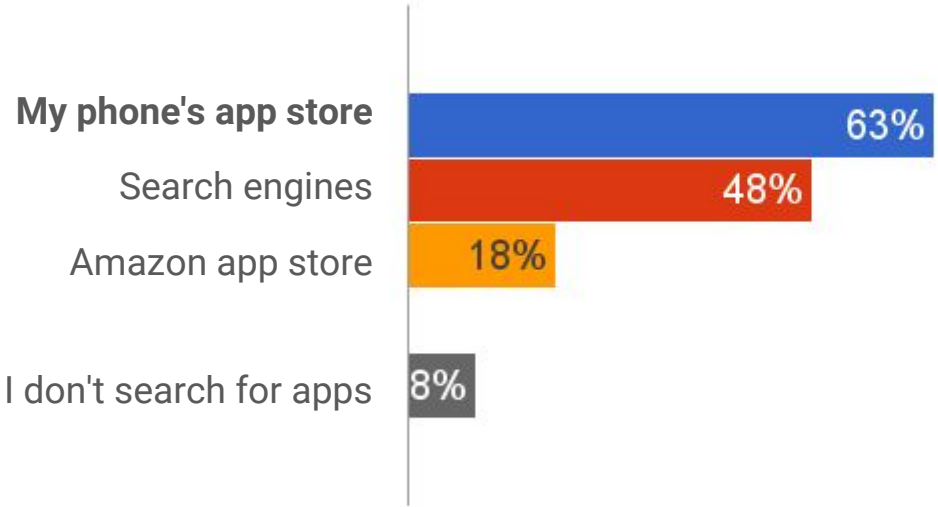
Ways to find out about shopping apps



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?

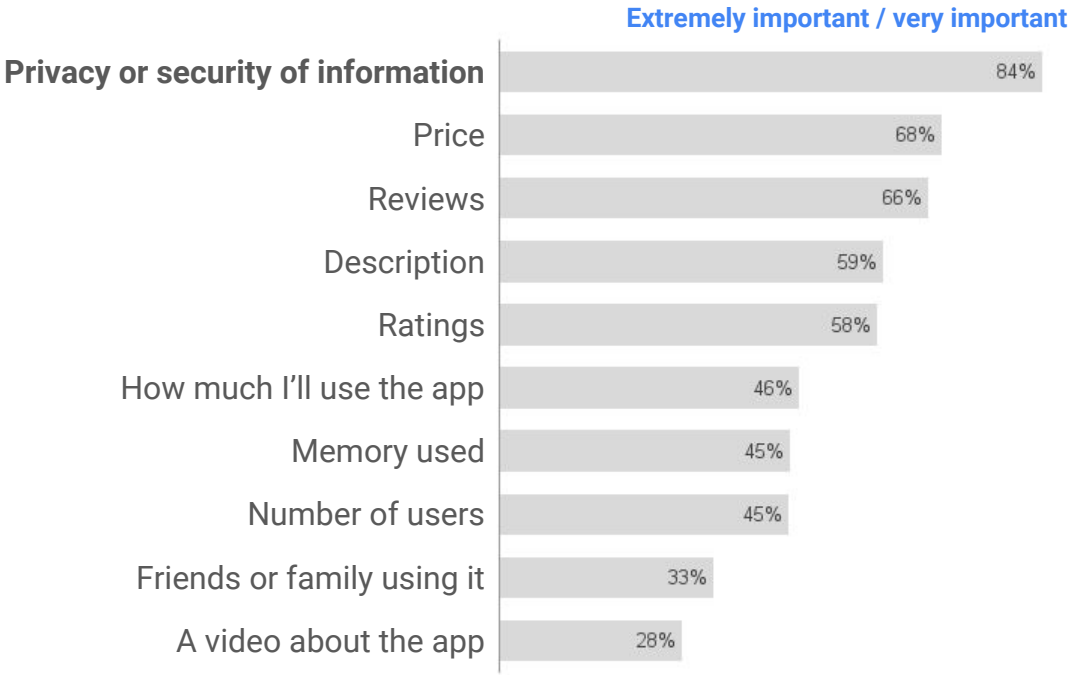
Google

Sources of finding shopping apps



Base: 300
Q36. Where do you search for shopping apps?

App store download decision factors



Base: Searches for apps on phone's app store (n=187)
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?

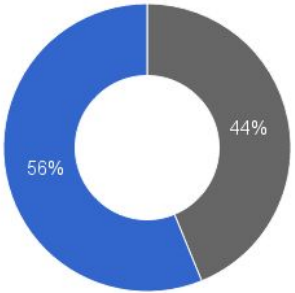
Google

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.

Google

Reasons for paying for shopping apps



Never paid to download shopping app

Have paid to download shopping app

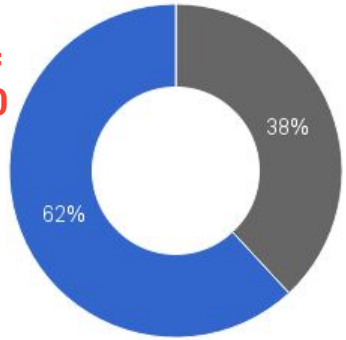
*Base: 300 *Median*
Q22. What is the most you have ever paid for a shopping app? Please enter amount to the nearest whole number.
Base: Have paid to download a shopping app (n=170)
Q23. Why have you chosen to pay for shopping apps over other free alternatives?

Google

Smartphone spending for products/services

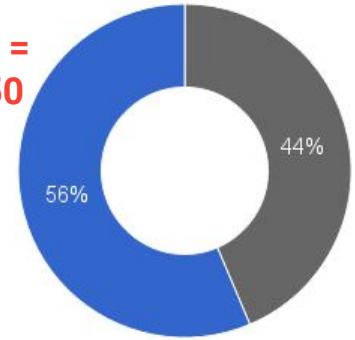
Past 3 months

Average* = ₽ 19749.50



Past 7 days

Average* = ₽ 1924.50

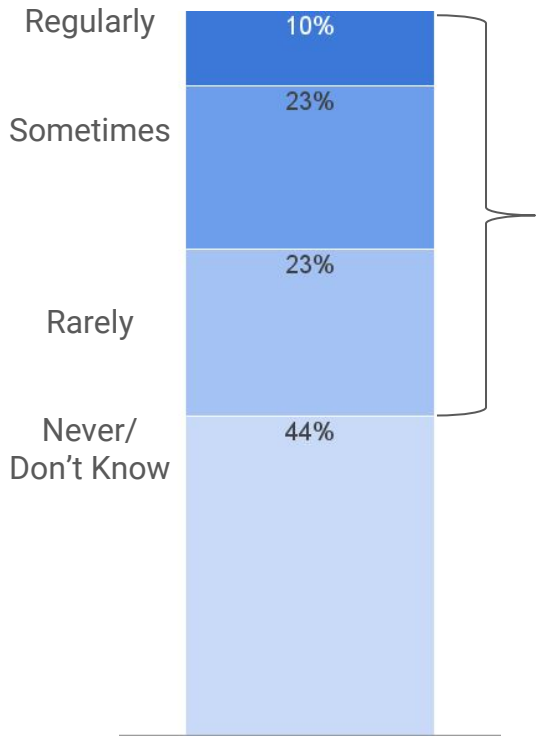


Have not spent money Spent money

*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?

Google

Frequency of paying for app upgrades/items



56%
have ever paid for upgrade or items for a shopping app

Base: 300
Q25. How often do you pay for upgrades or items for a shopping app?

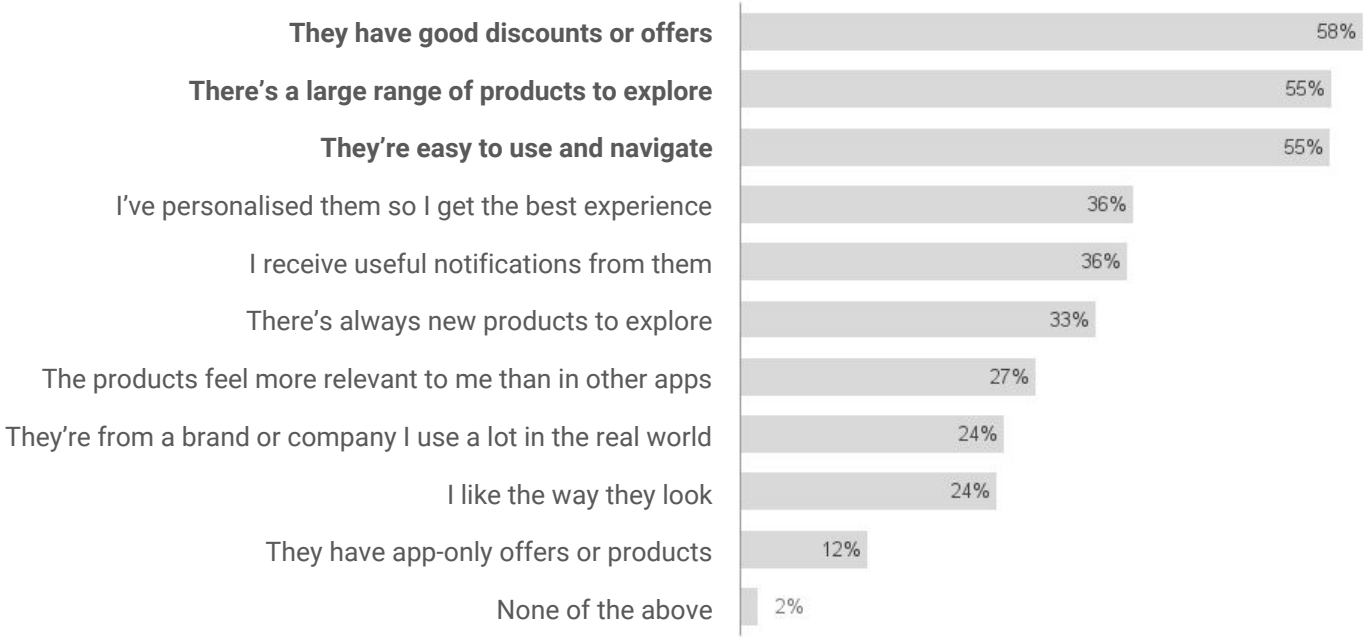
Google

Preferences

Favourite shopping apps are…

Base: 300
*Q26. Which are your favourite shopping smartphone apps that you currently use? *Apps with at least 5 mentions shown.*

Characteristics of favourite apps



Base: 300
Q27.Which of the following are true of your favourite apps?

Google

Preferred features for shopping apps

Base: 300
Q28. Thinking about all of the shopping apps that you use, which of the following features do you prefer to have?

Google

Useful notifications on phone

98%

find shopping notifications on mobile **useful**

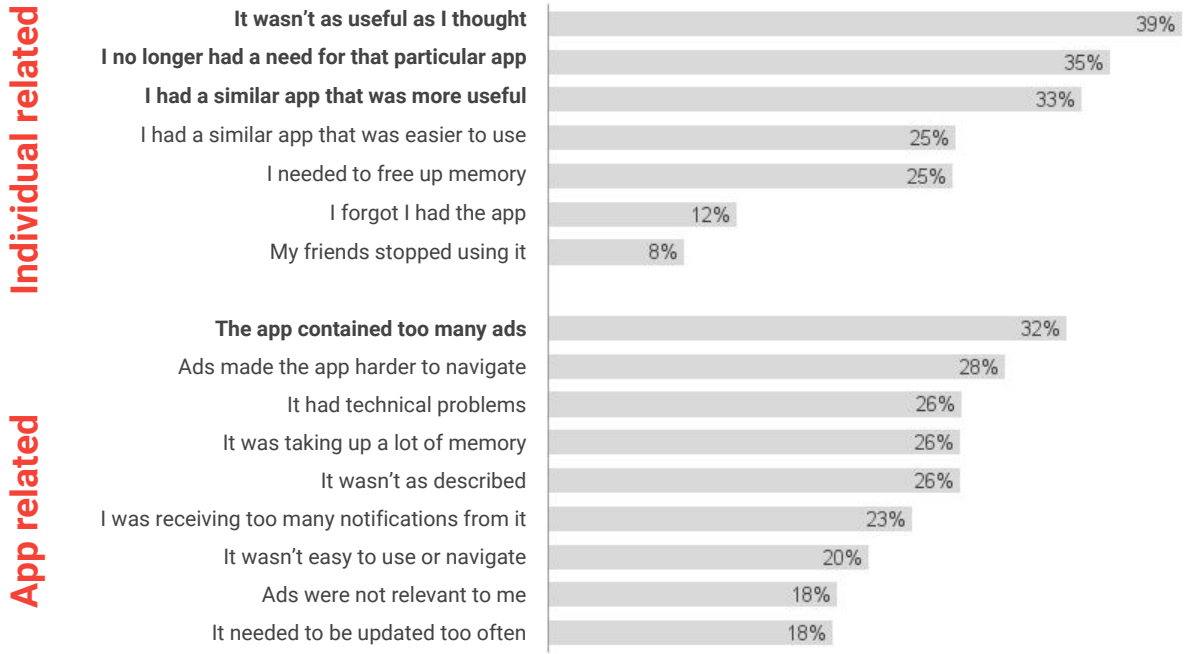
Most useful notifications

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?

Google

Abandonment & re-engagement

Reasons for abandonment



Why no longer needed?

Other apps covered shopping needs
67%

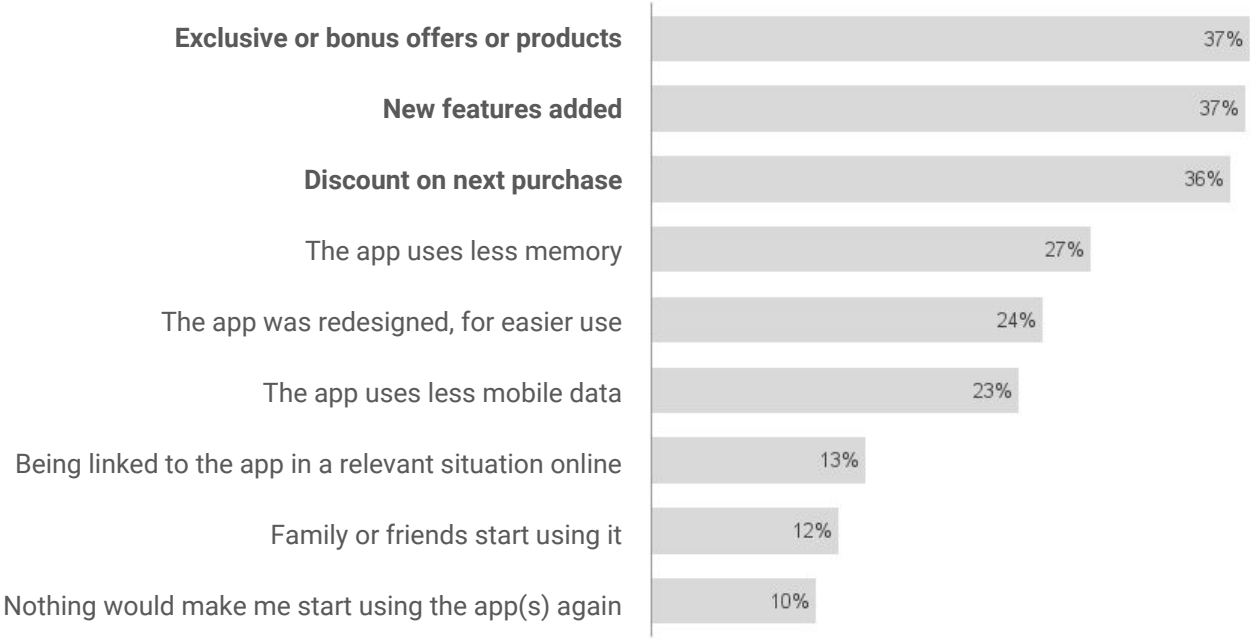
Was using for one-off purchase
36%

No longer interested in the brand/company
18%

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=102)
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?

Google

Reasons to re-engage



Base: 300
Q43. Thinking about shopping apps that you've stopped using which of the following would encourage you to use the app again?

Google

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