

| Shopping on mobile / FR

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

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

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

02

03

App sign in for security is strongly preferred [slide 28]

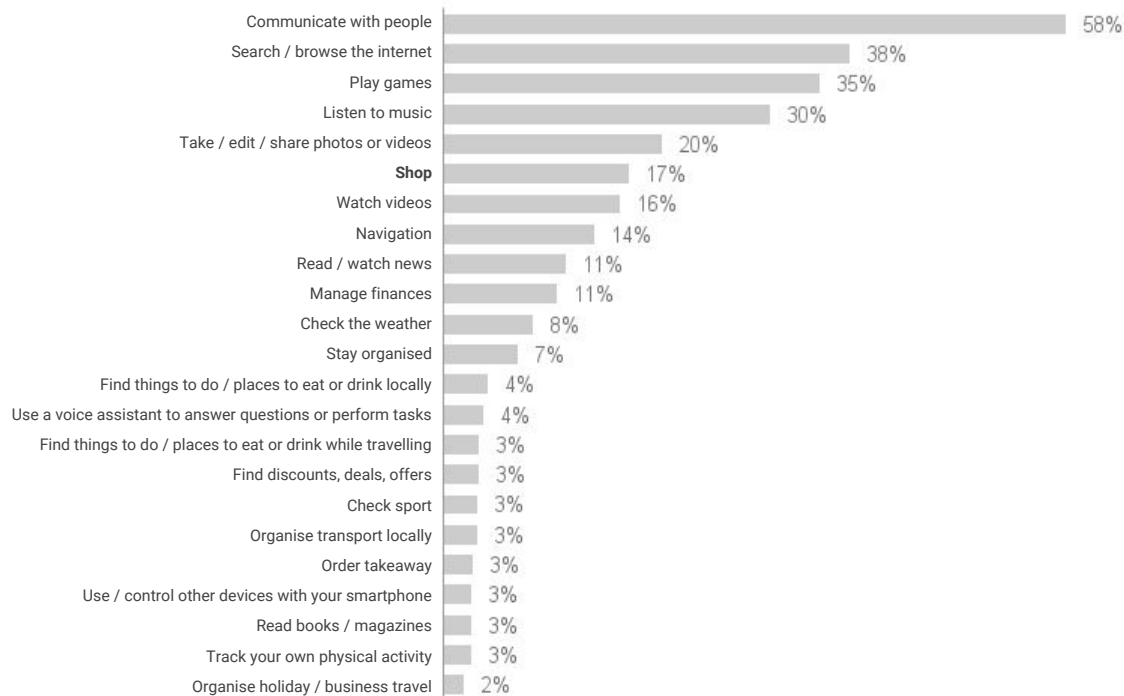
Discounts or offers and less memory use can lead some to re-engage [slide 32]

04

| Smartphone activities

| Must have smartphone activities

Amongst those who use mobile for shopping activities



| Frequency of shopping on mobile

17%

At least **daily**

38%

At least **weekly**

| Types of purchases made on smartphone

Shopped for in past 30 days

63%



Clothes,
shoes &
accessories

30%



Skincare &
cosmetics

26%



Home, garden
& DIY

41%



Electronics

27%



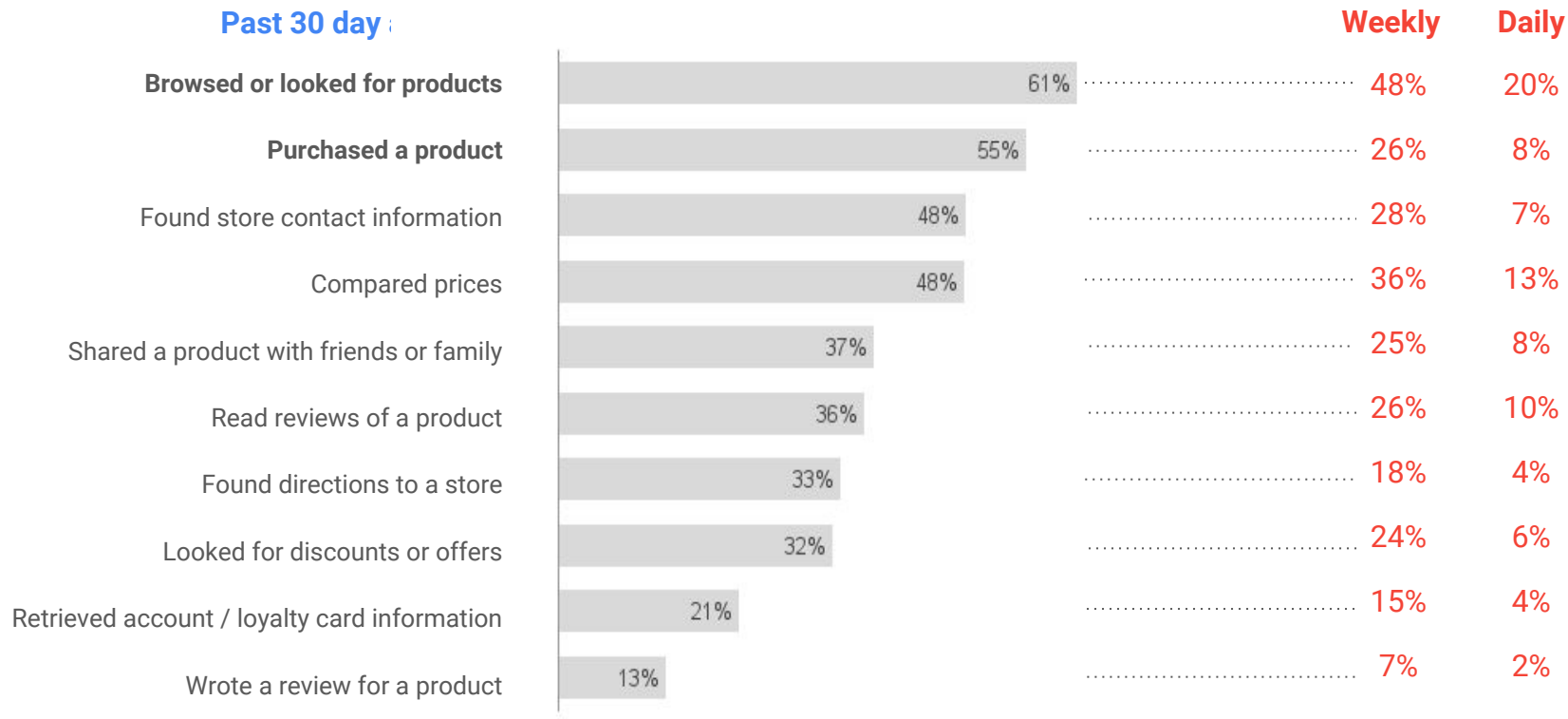
Groceries

21%



Sports &
outdoor

Shopping activities on smartphone



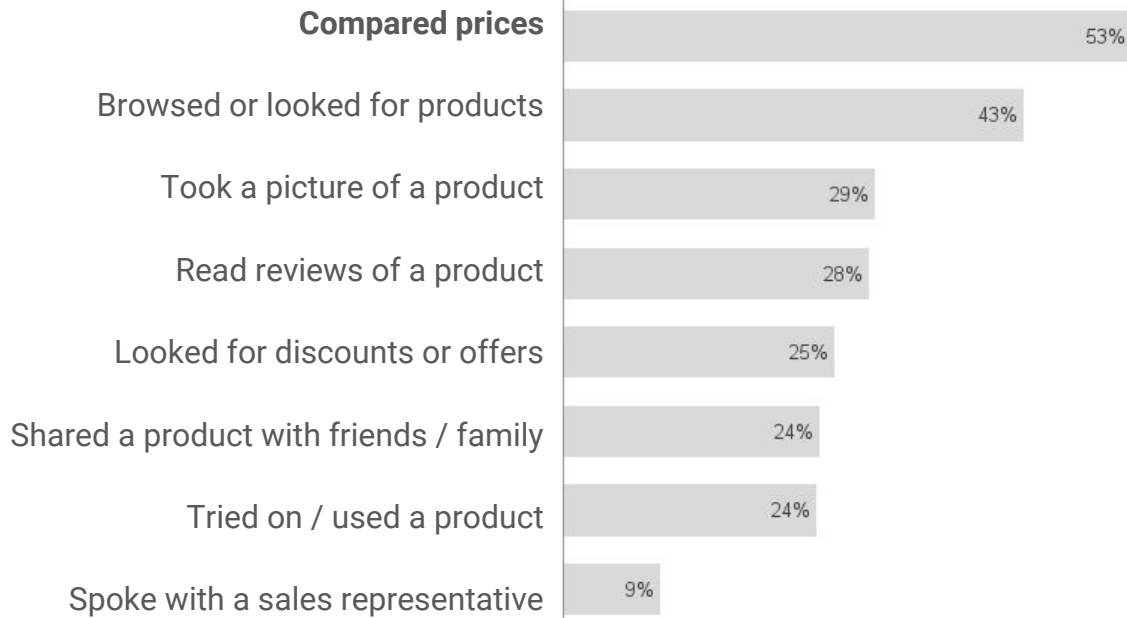
Base: 501
 Q8. Which of the following activities have you done on your smartphone in the past 30 days? (Using either a mobile website or an app)
 Q9. How often do you do each of the following activities on your smartphone?

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

47%

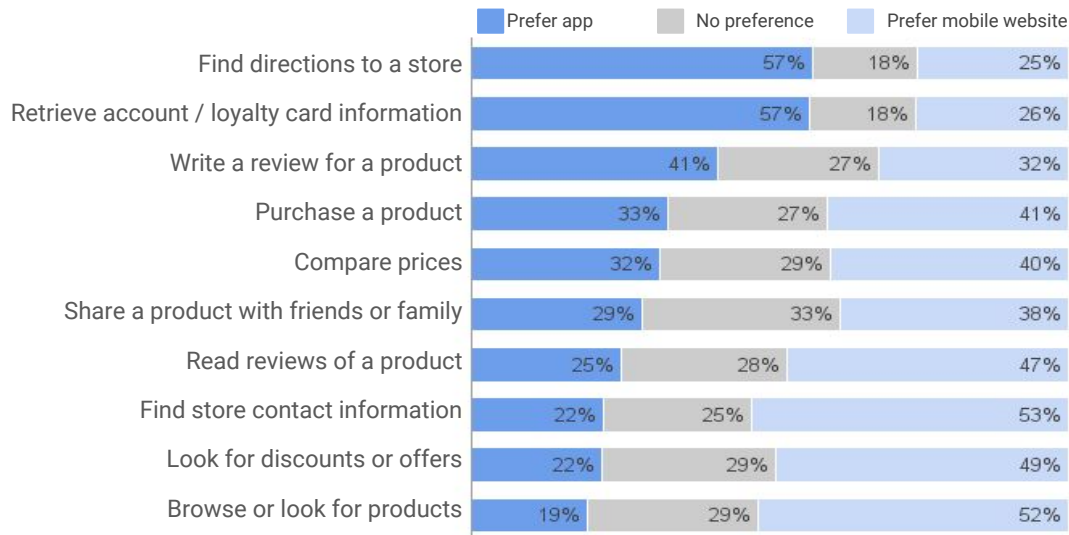
Used an app

56%

Used a mobile website

Preferences for top shopping activities

Among those who have done activity in past 30 days



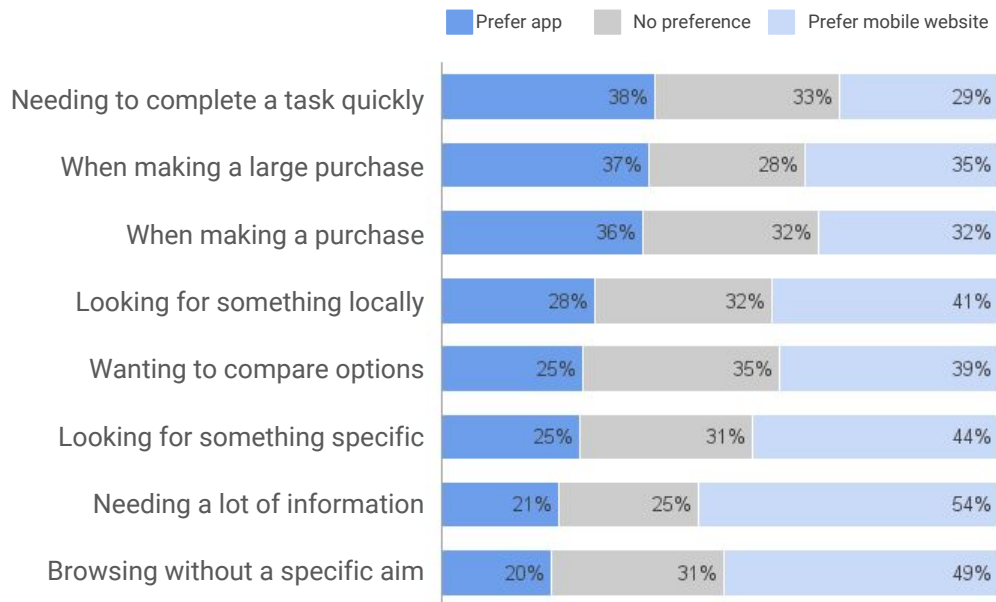
Base: 501

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



- When it comes to shopping activities, mobile sites are generally preferred.
- Apps are preferred more only when needing to complete a task quickly.
- There is no clear preference when making purchases with feeling of security cited as the main reason for preferring either platform (see slide 13).

Top reasons for app vs mobile site preference

Top reasons app preferred

| |
|--|
| Quicker to load (61%) Simpler to navigate (57%) |
| Feels more secure (63%) Simpler to navigate (47%) |
| Simpler to navigate (67%) Quicker to load (57%) |
| Simpler to navigate (59%) Quicker to load (46%) |

Situation

| |
|------------------------------------|
| Needing to complete a task quickly |
| When making a large purchase |
| Looking for something locally |
| Browsing without a specific aim |

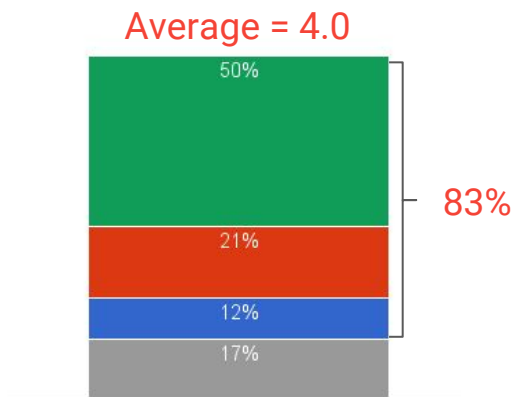
Top reasons mobile website preferred

| |
|--|
| Simpler to navigate (47%) No need to provide personal information (34%) |
| Feels more secure (43%) Contains more information (37%) |
| Contains more information (43%) Simpler to navigate (42%) |
| Contains more information (49%) No need to provide personal information (47%) |

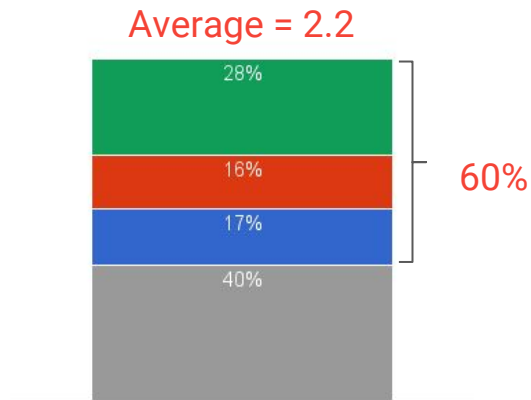
| App repertoire

Number of shopping apps installed

Currently installed



Installed past 3 months



None One app Two apps Three or more apps

Base: 501

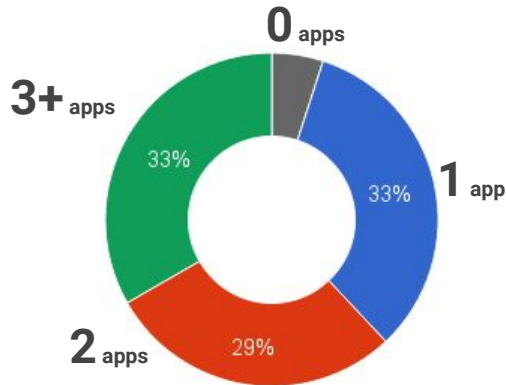
Q14. How many shopping apps are installed on your smartphone (including any that were already installed when you bought it)?

Q18. How many shopping apps have you installed on your smartphone in the past 3 months, including apps you've since uninstalled?

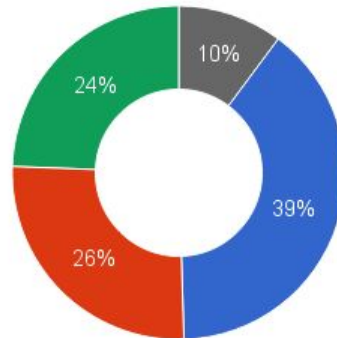
Lifecycle of new shopping apps

Among those who installed a shopping app in the past 3 months, an average of **3.6 apps were installed** in the past 3 months...

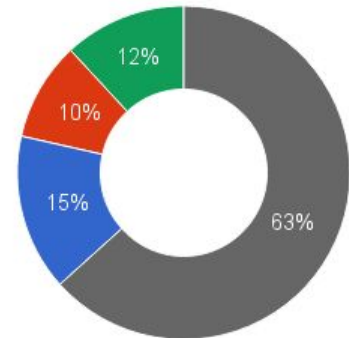
3.0 were ever opened
on average



2.2 were still in use
on average



1.1 were uninstalled
on average



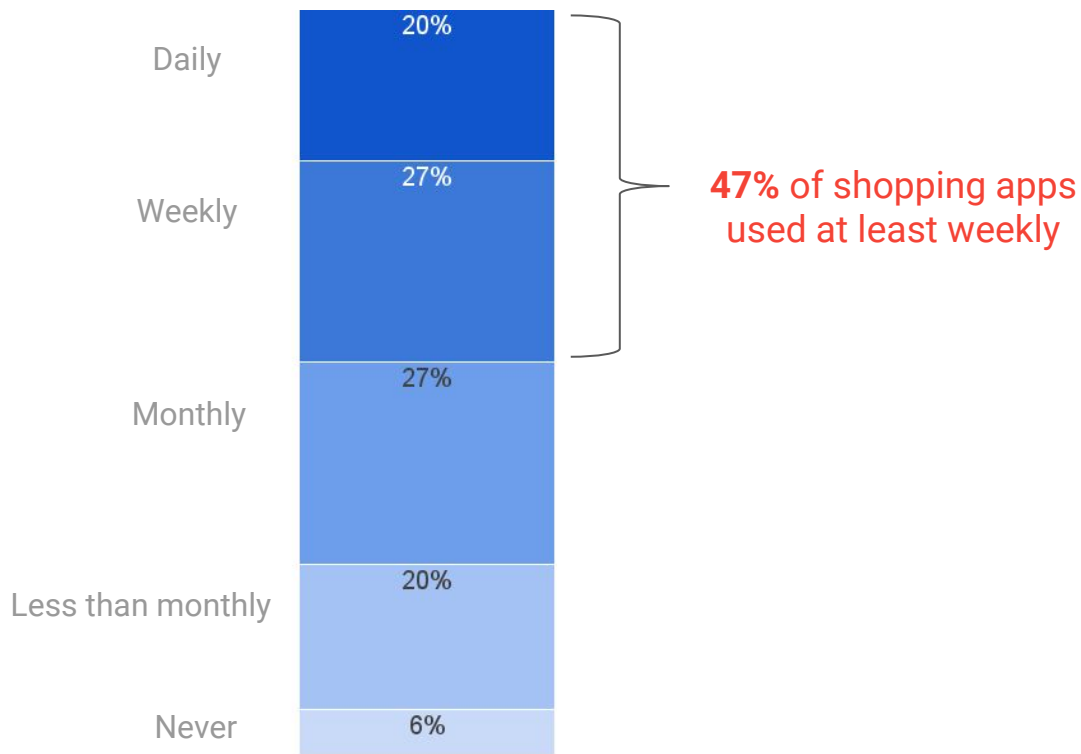
Base: Installed shopping app(s) in the past 3 months (n=303)

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?

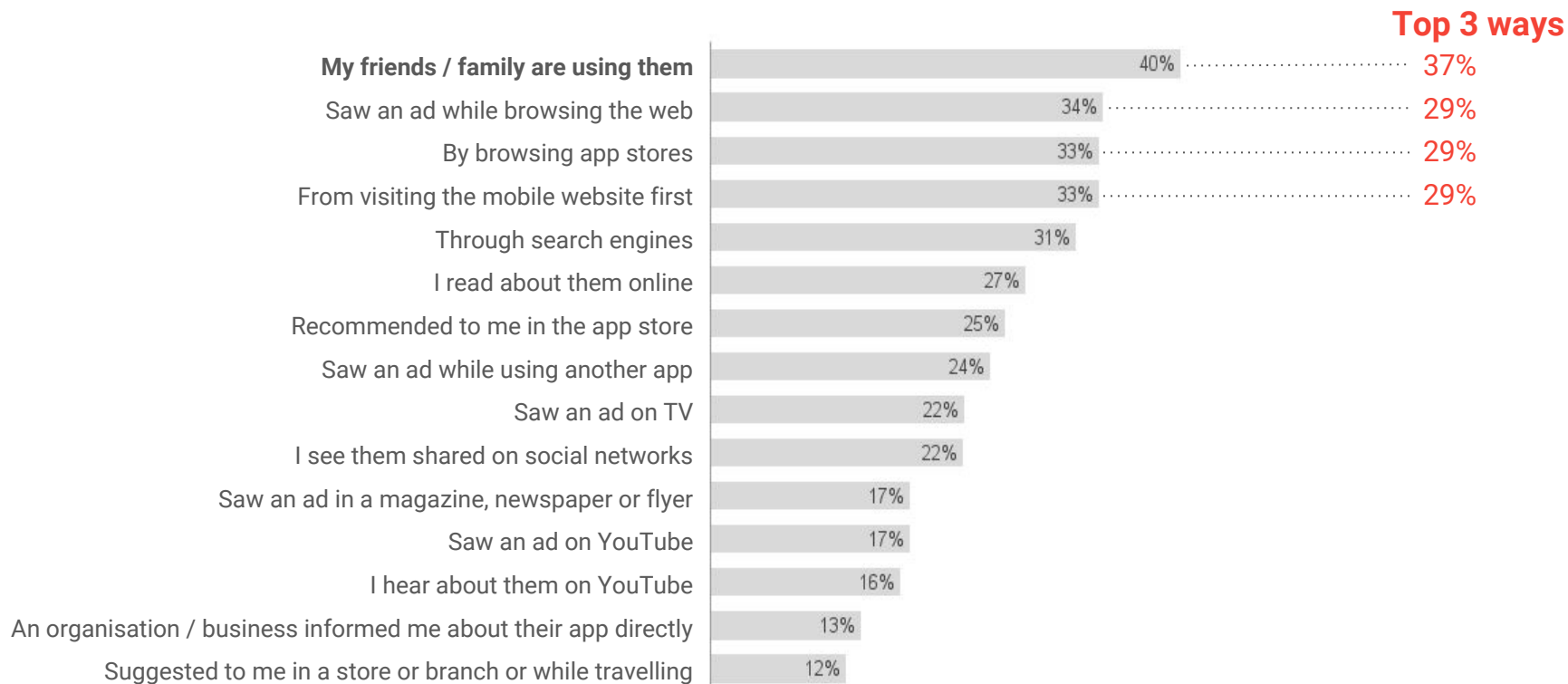
Average percentage of shopping apps used



Base: Has shopping apps installed on smartphone (n=415)

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

Ways to find out about shopping apps



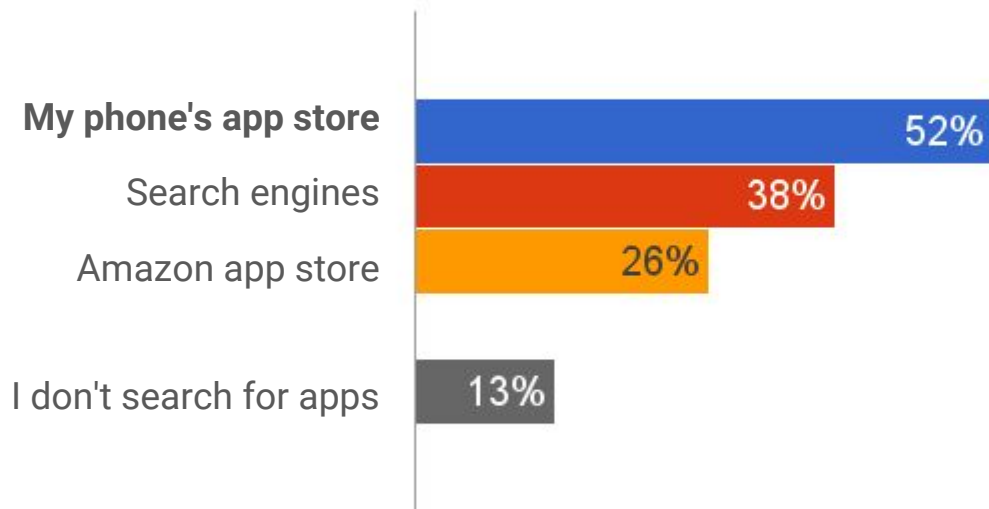
Base: 501

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

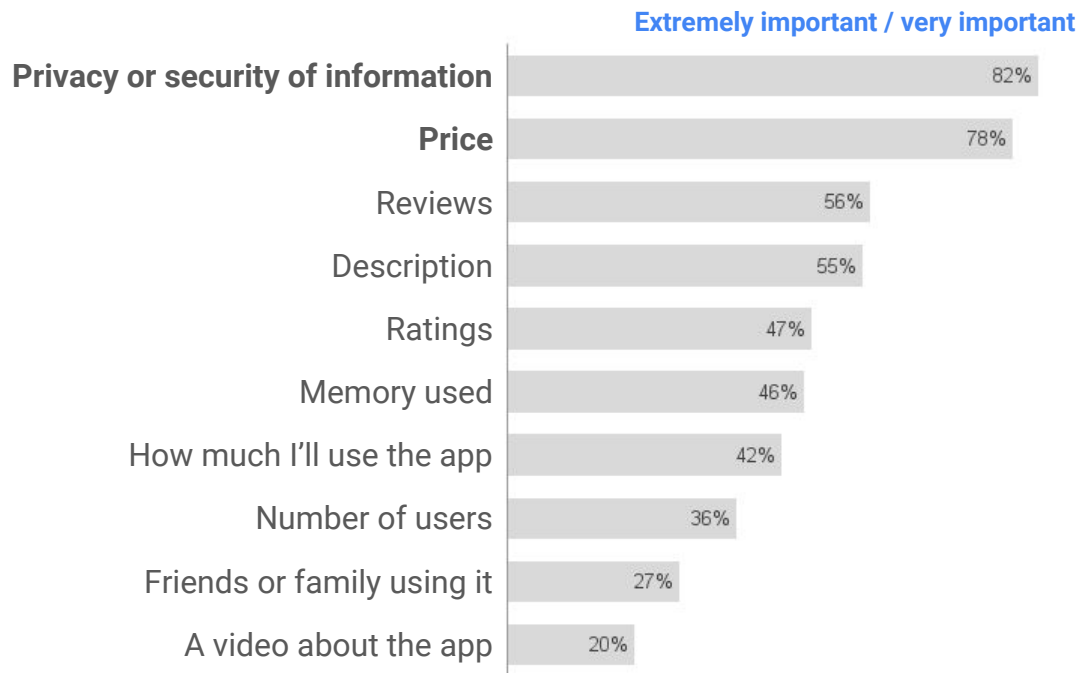
Q33. And have you found out about a shopping app in any of these ways?

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

| Sources of finding shopping apps



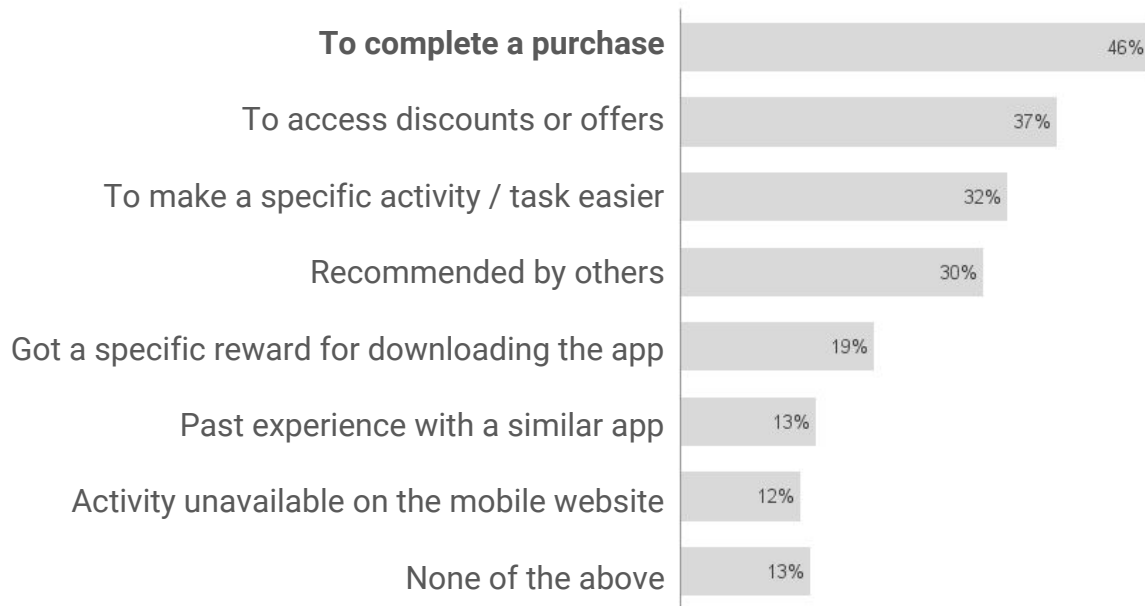
App store download decision factors



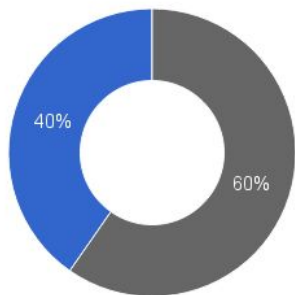
Base: Searches for apps on phone's app store (n=259)

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



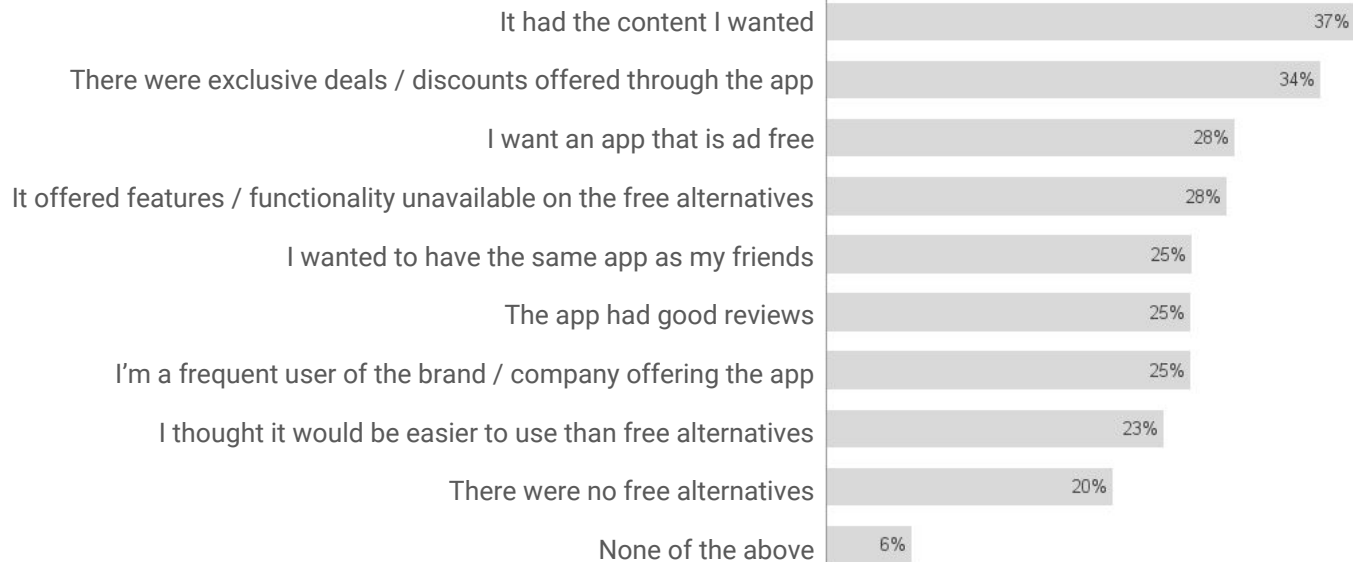
Reasons for paying for shopping apps



Never paid to download shopping app

Have paid to download shopping app

Reasons for paying



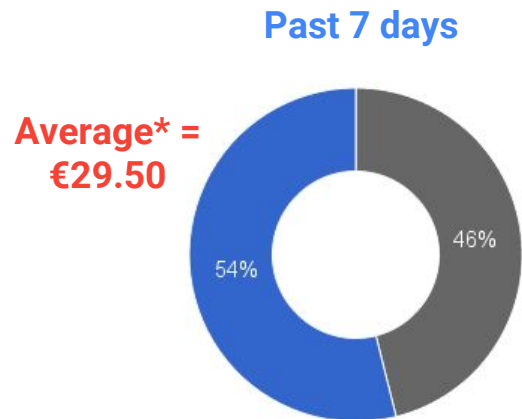
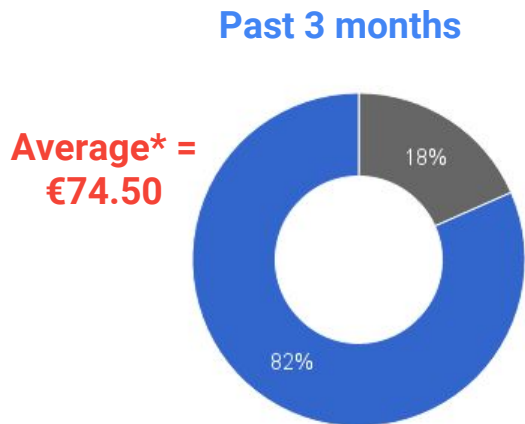
Base: 501 *Median

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=202)

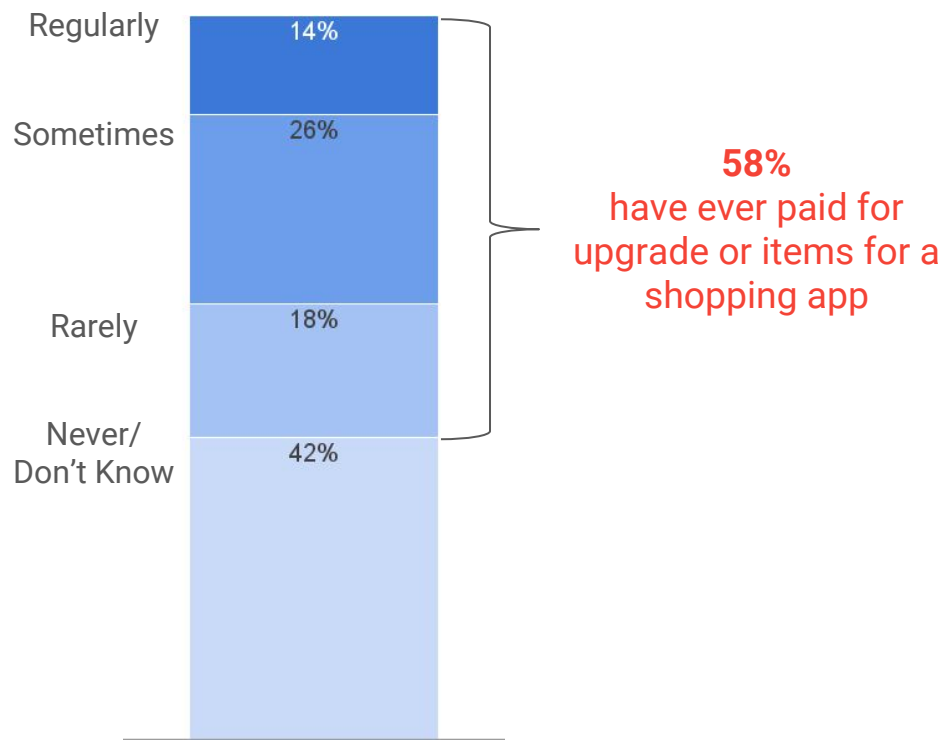
Q23. Why have you chosen to pay for shopping apps over other free alternatives?

Smartphone spending for products/services



■ Have not spent money ■ Spent money

Frequency of paying for app upgrades/items



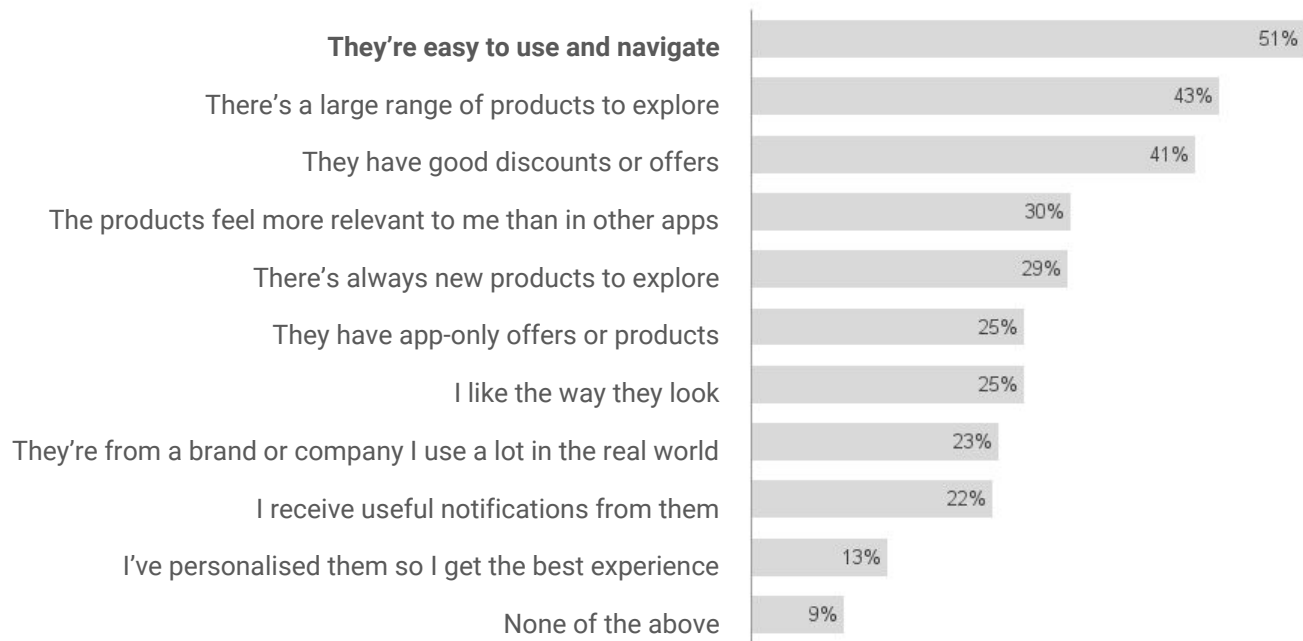
| Preferences

| Favourite shopping apps are.....

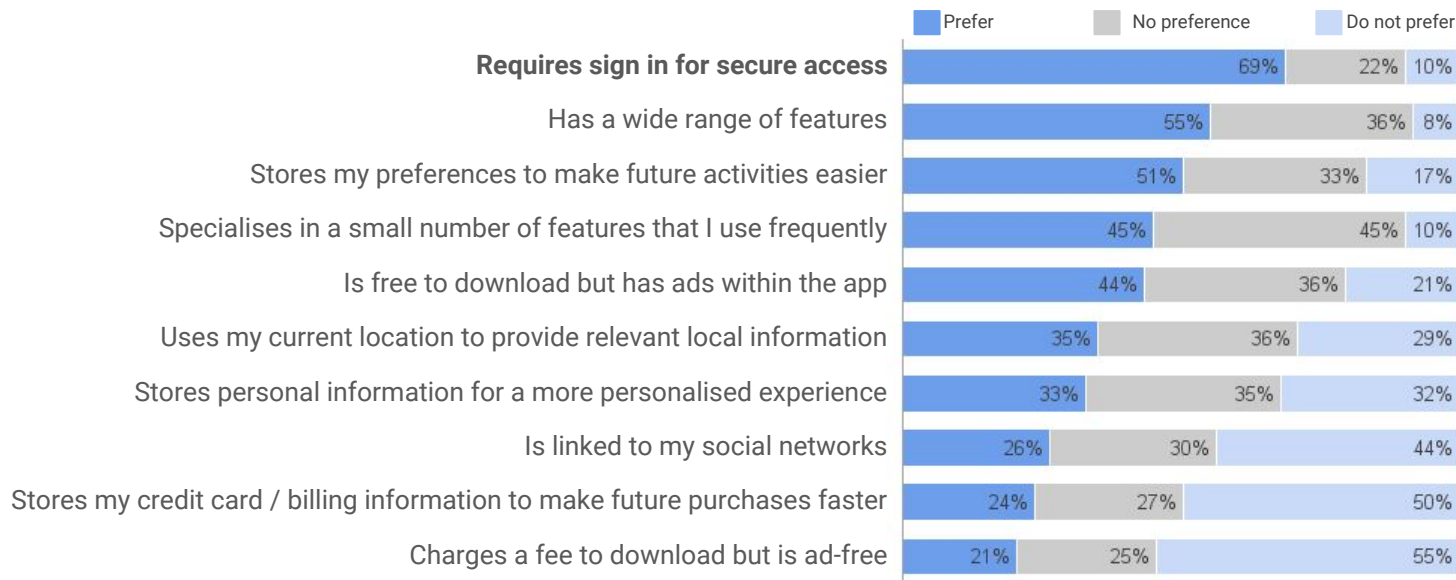


For a deeper look into the Amazon app, [see final section](#).

Characteristics of favourite apps



Preferred features for shopping apps

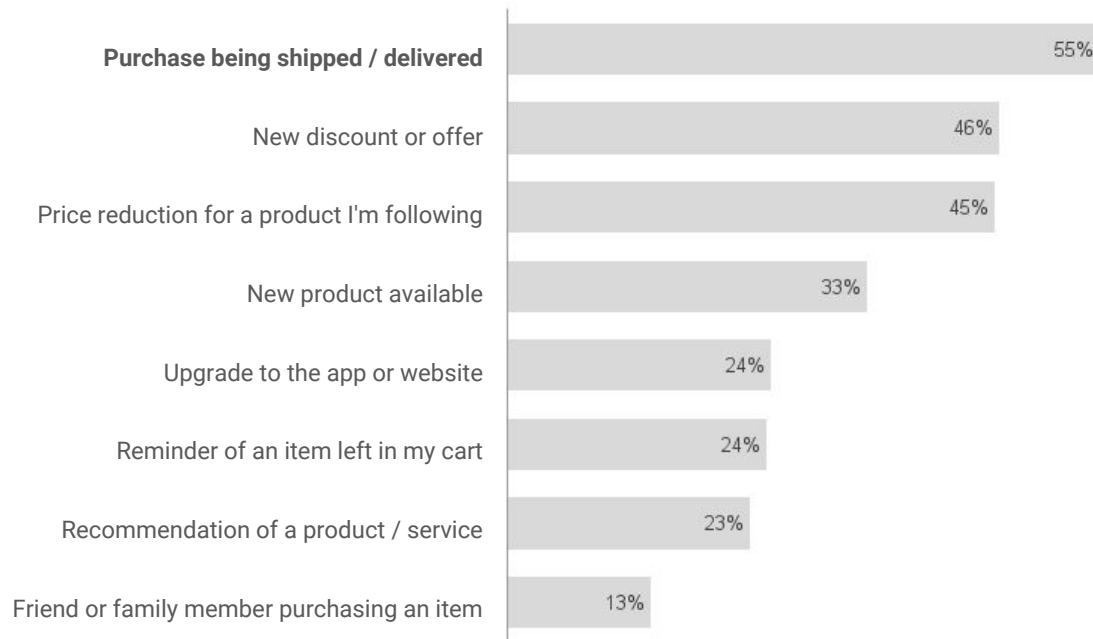


Useful notifications on phone

90%

find shopping
notifications on
mobile **useful**

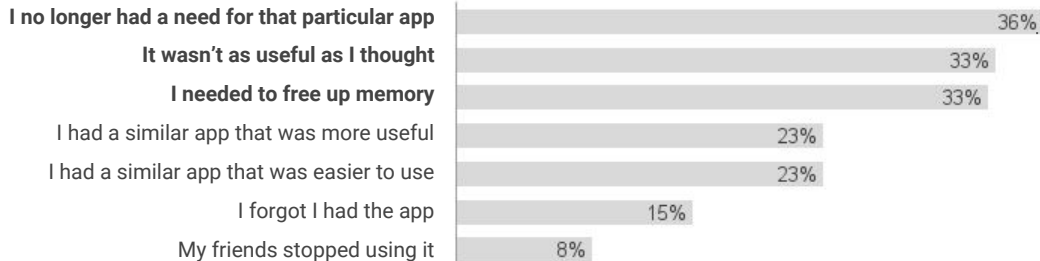
Most useful notifications



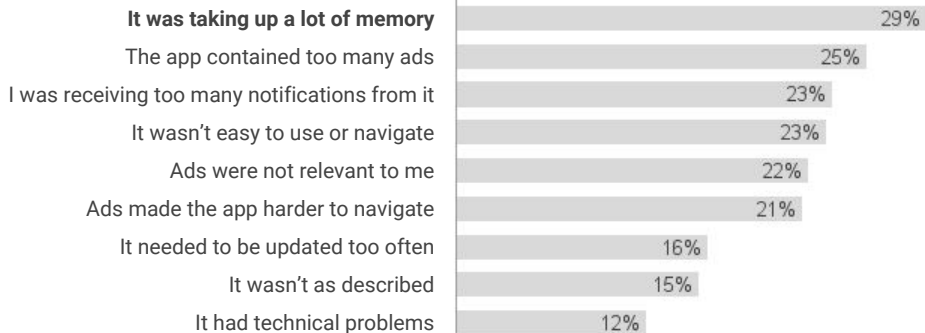
| Abandonment & re-engagement

Reasons for abandonment

Individual related



App related



Why no longer needed?

Other apps covered shopping needs
46%

Was using for one-off purchase
36%

No longer interested in the brand/company
35%

Base: 501

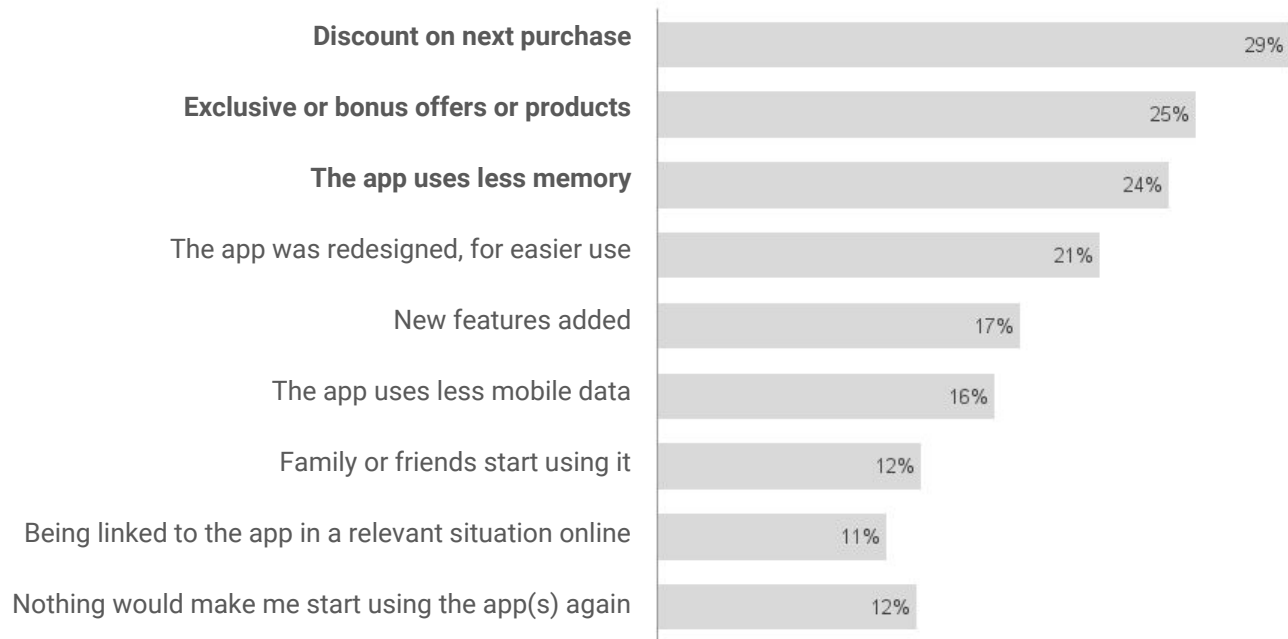
Q40. Have you stopped using shopping apps on your smartphone for any of the reasons below? Select all that apply.

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=182)

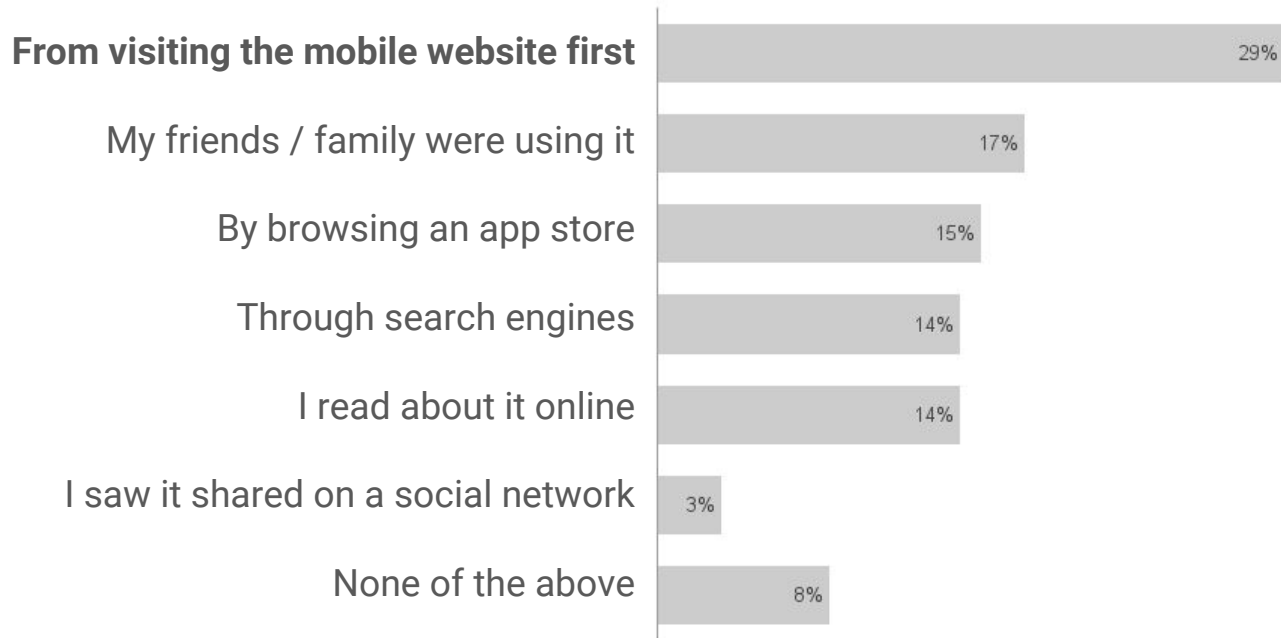
Q42. You said you've stopped using shopping apps because you no longer had a need for it / them. Why did you no longer need it / them?

Reasons to re-engage

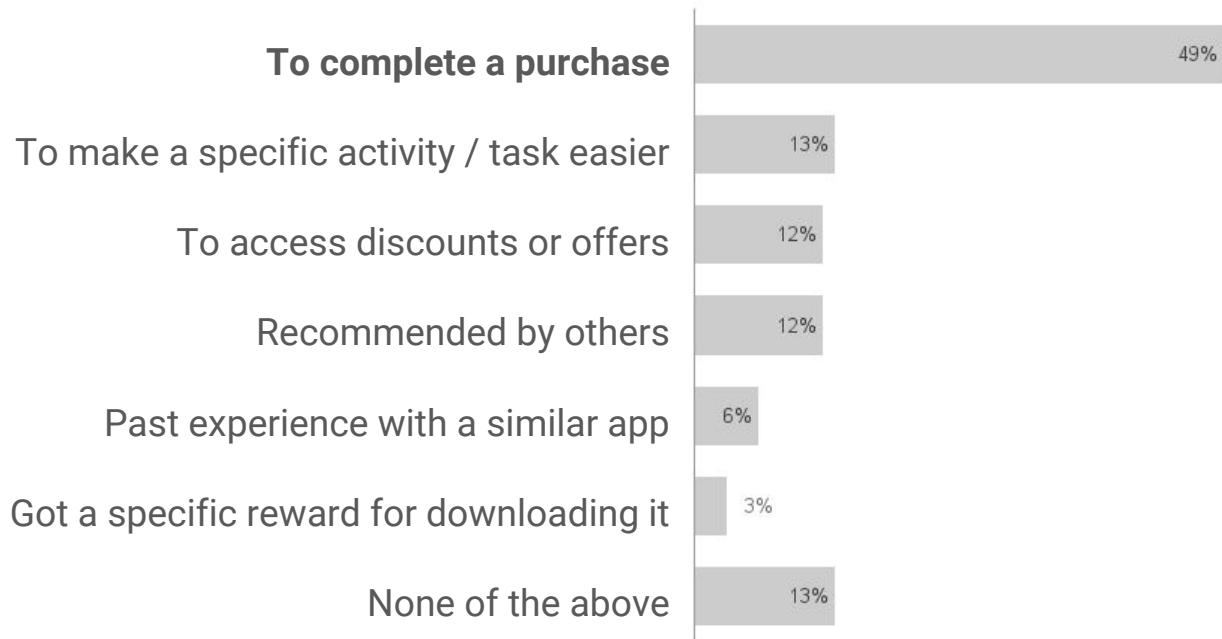


| Favourite app: Amazon

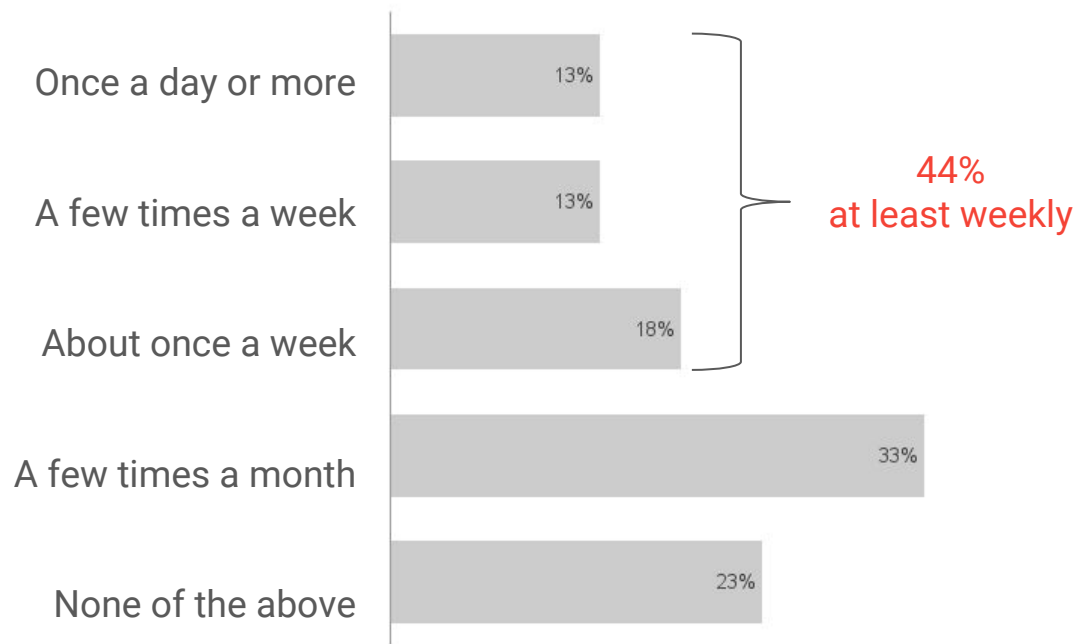
| Amazon app discovery



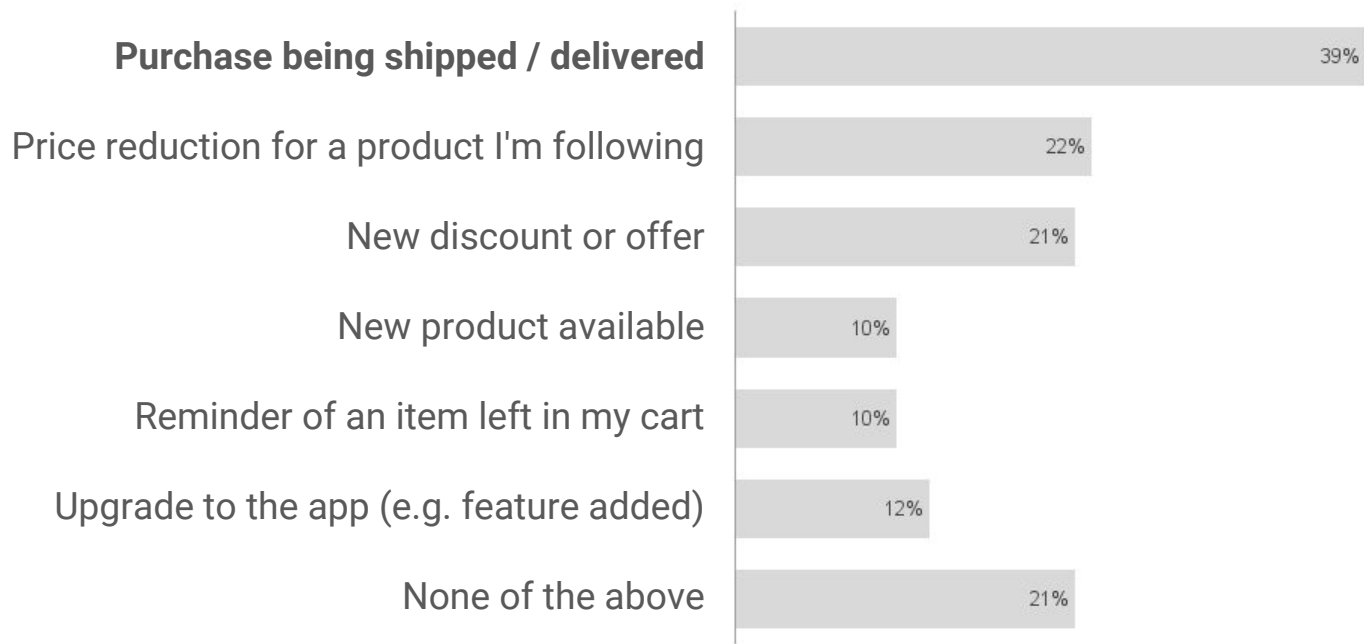
Reasons for downloading the Amazon app



Frequency of using the Amazon app



Useful Amazon app notifications



Base: 100

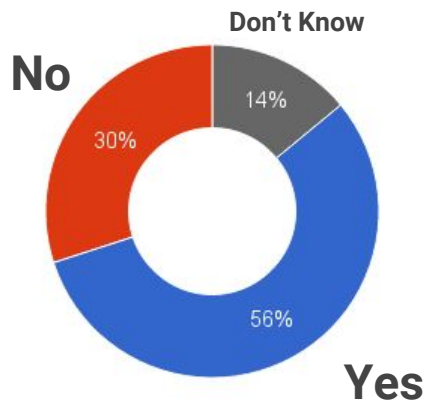
Q5. Which of the following notifications from the Amazon app have you found useful?

Features liked about the Amazon app



Use of Amazon's mobile website

Used mobile website since getting the app?



Reasons to use mobile website instead of app

Browsing without a specific aim

41%

Forgot I had the app

32%

Wanting to compare options

30%

Looking for something specific

27%

Needing a lot of information

23%

Looking for something locally

11%

Base: 100

Q9. Have you used Amazon's mobile website since getting the app?

Base: 56

Q10. Why did/do you use Amazon's mobile website instead of the app?

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