

| Shopping on mobile / TR

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 = 300 per vertical	
Market(s)	TR (also available for Uk, US, CA, FR, NL, 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, apps are used slightly more than mobile sites [slide 11]

02

03

Security and features are key - with sign in and wide range of features preferred [slide 28]

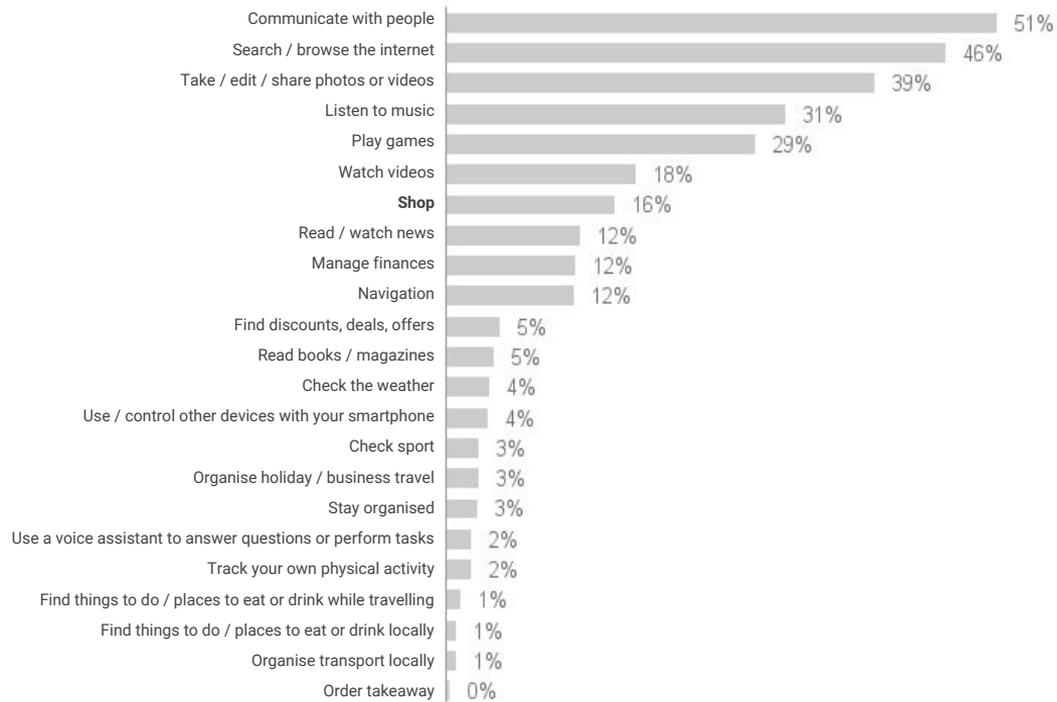
Exclusive offers can lead some to re-engage [slide 32]

04

| Smartphone activities

| Must have smartphone activities

Amongst those who use mobile for shopping activities



Base: 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

27%

At least **daily**

61%

At least **weekly**

| Types of purchases made on smartphone

Shopped for in past 30 days

59%



Clothes,
shoes &
accessories

36%



Skincare &
cosmetics

18%



Sports &
outdoor

42%



Electronics

28%



Groceries

10%



Home, garden
& DIY

Shopping activities on smartphone



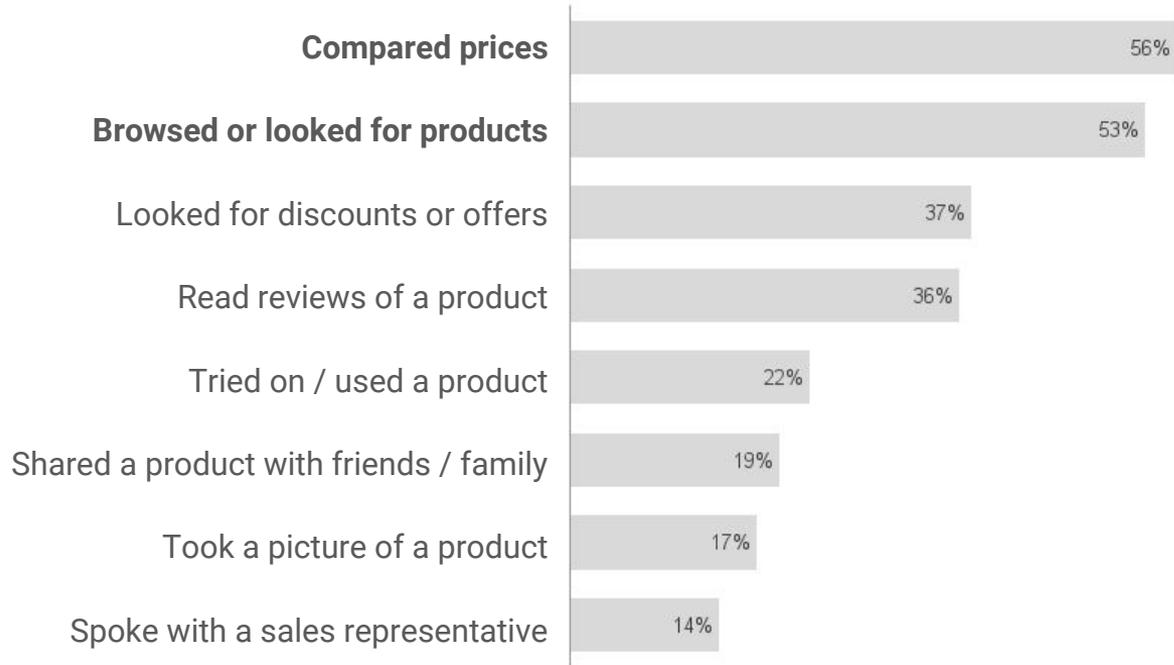
Base: 300
Q8. Which of the following activities have you done on your smartphone in the past 30 days? (Using either a mobile website or an app)
Q9. How often do you do each of the following activities on your smartphone?

Smartphone activities while in a store

89%

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

54%

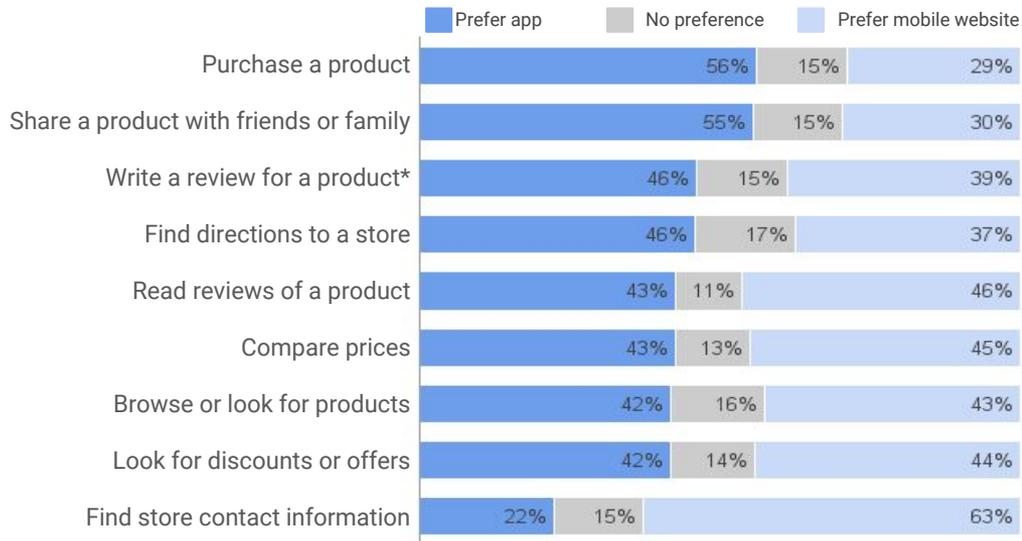
Used an app

44%

Used a mobile website

Preferences for top shopping activities

Among those who have done activity in past 30 days



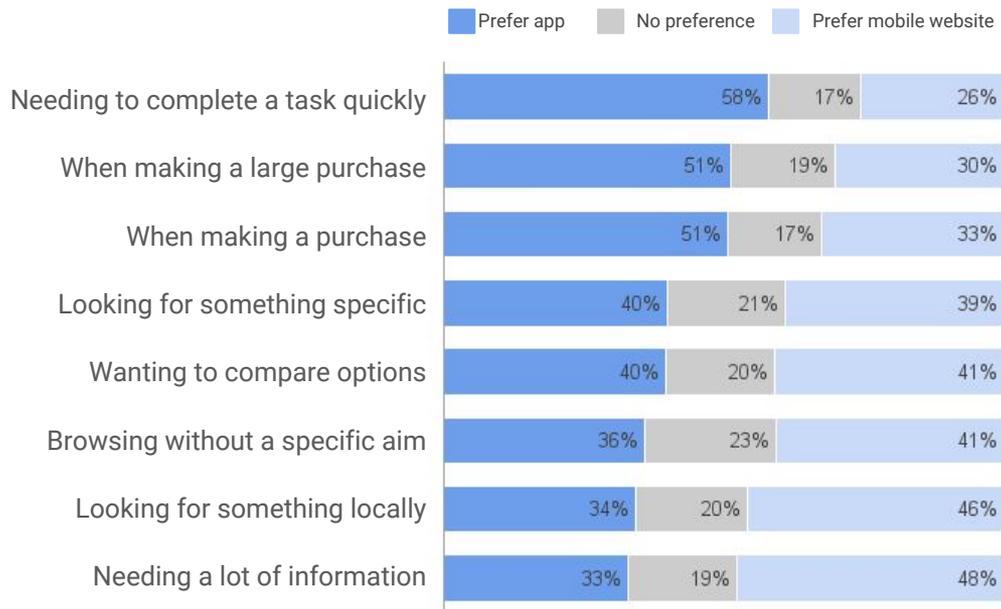
Base: 300

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?

Platform preferences for shopping activities



- When it comes to lower purchase funnel situations, like making a purchase, apps are preferred. Apps are also preferred for completing tasks quickly.
- Mobile websites are preferred for upper purchase funnel situations, such as needing more information, looking for something locally, or browsing.
- Perceived security of apps (see slide 13) make them the preferred platform for making purchases

Top reasons for app vs mobile site preference

Top reasons app preferred

Simpler to navigate* (50%) Quicker to load* (50%)
Feels more secure (65%) Simpler to navigate (63%)
Simpler to navigate* (55%) Feels more secure* (51%)
Simpler to navigate (63%) Quicker to load (44%)

Situation

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

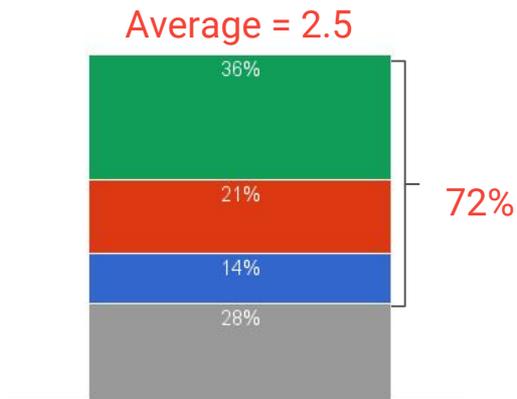
Top reasons mobile website preferred

Simpler to navigate (57%) Quicker to load (42%)
Contains more information* (41%) More likely to go to right page* (36%)
Contains more information (51%) More likely to go to right page (37%)
Simpler to navigate (50%) No need to provide personal information (50%)

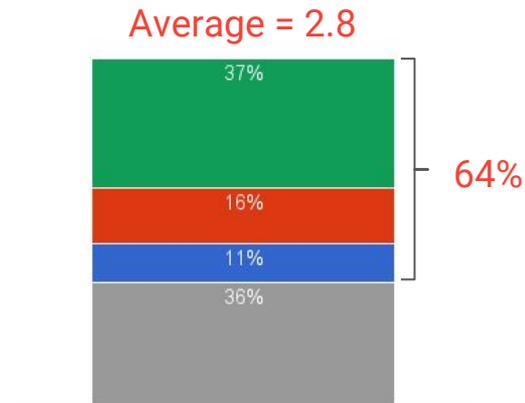
| App repertoire

Number of shopping apps installed

Currently installed



Installed past 3 months



None One app Two apps Three or more apps

Base: 300

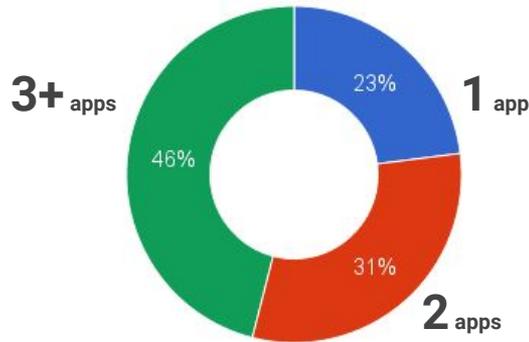
Q14. How many shopping apps are installed on your smartphone (including any that were already installed when you bought it)?

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

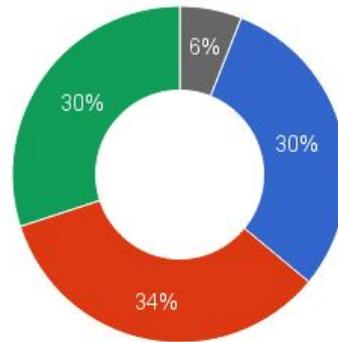
Lifecycle of new shopping apps

Among those who installed a shopping app in the past 3 months, an average of **4.3 apps were installed** in the past 3 months...

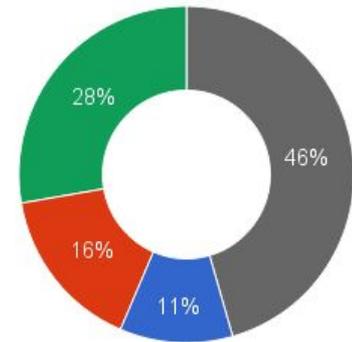
3.5 were ever opened
on average



2.6 were still in use
on average



1.9 were uninstalled
on average



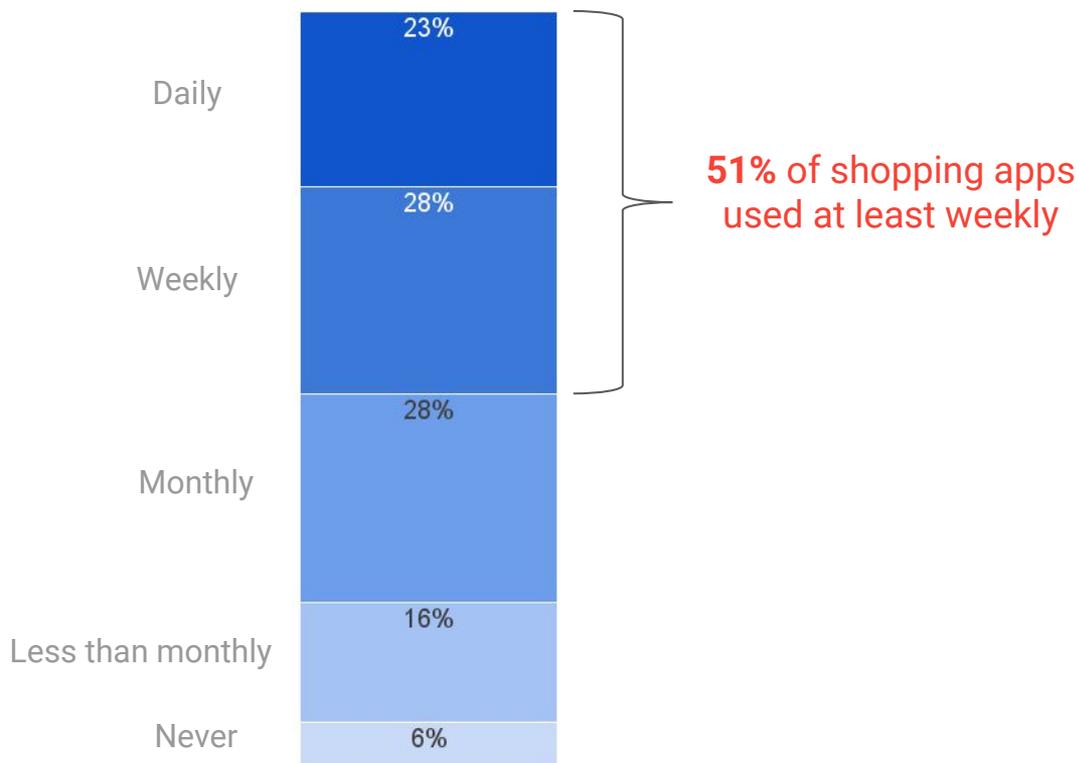
Base: Installed shopping app(s) in the past 3 months (n=193)

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

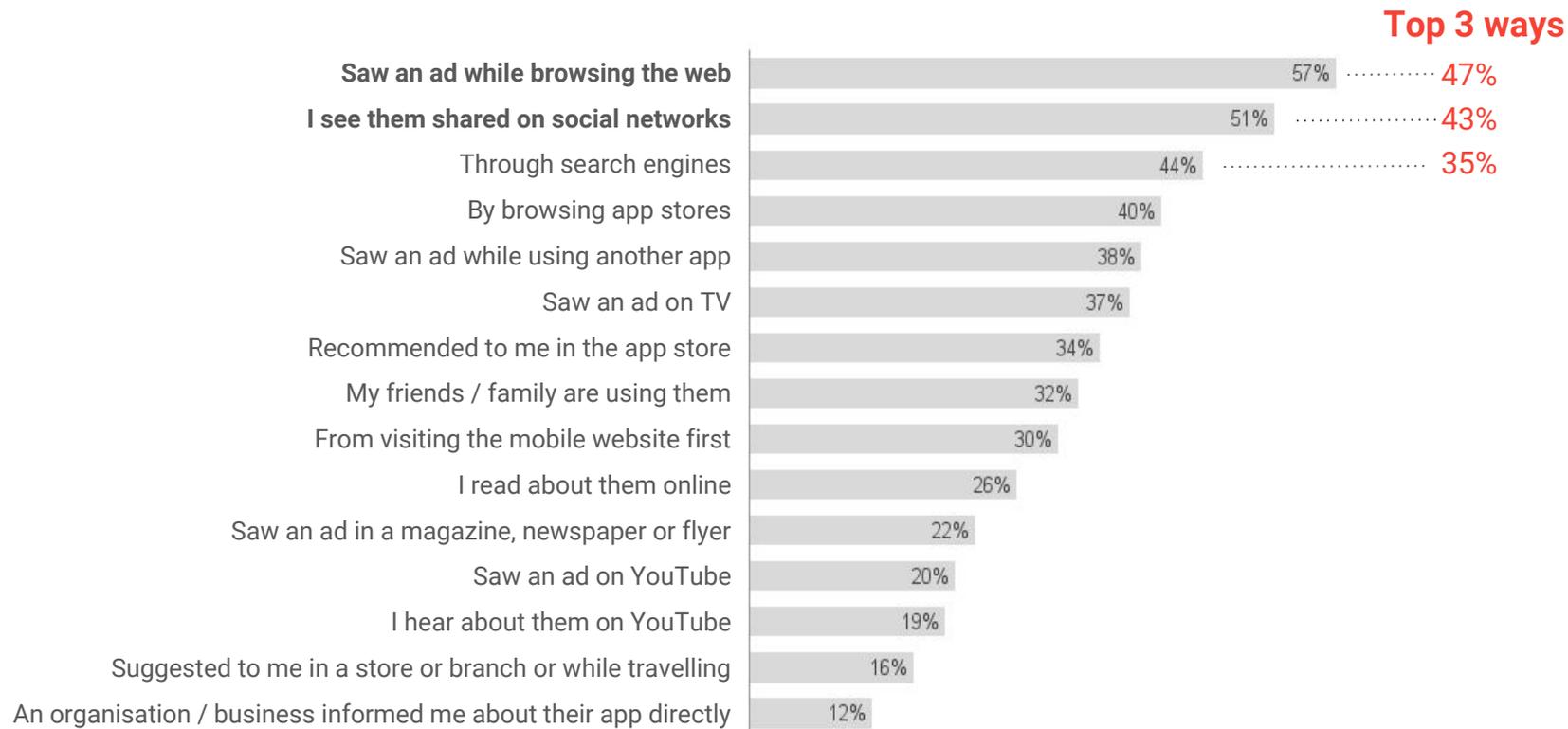
Q20. How many of those [VERTICAL] apps you've installed in the past 3 months are you still using now?

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



Ways to find out about shopping apps



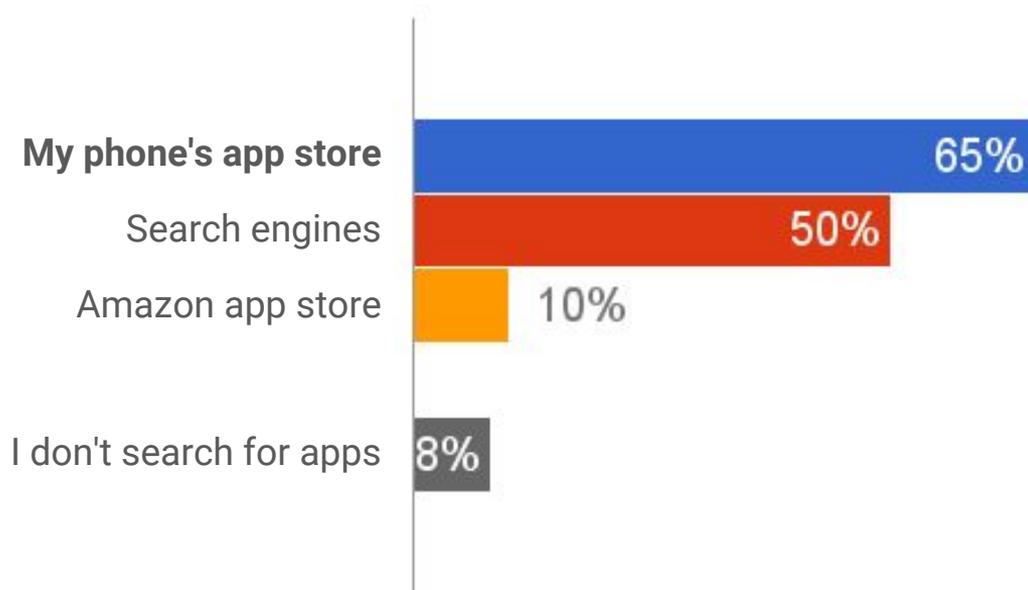
Base: 300

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

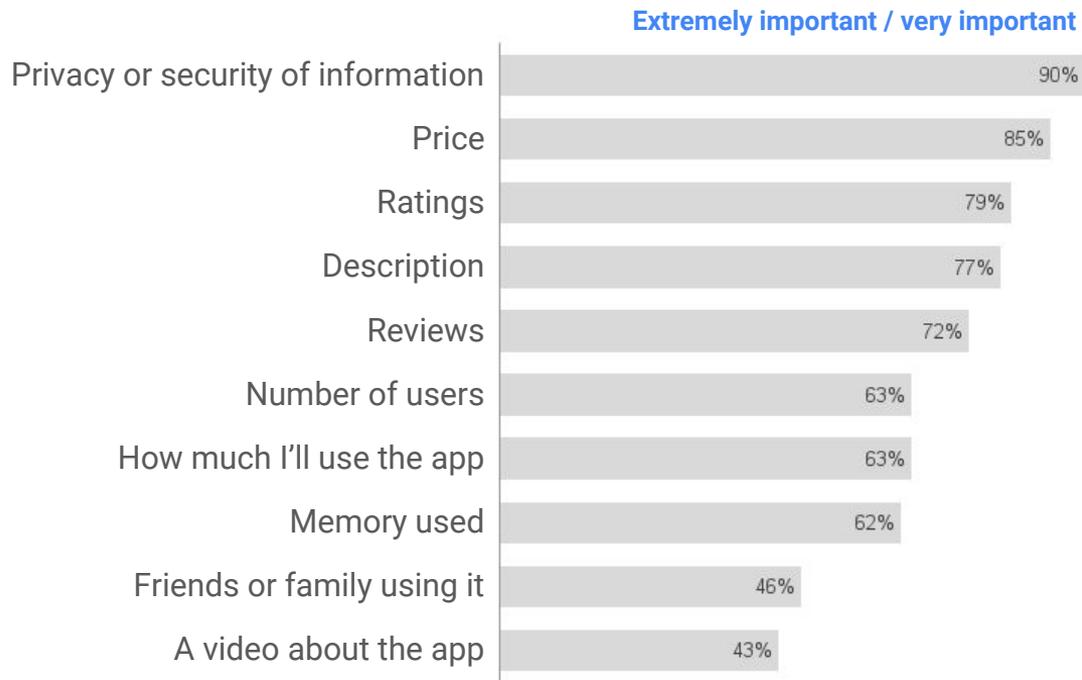
Q33. And have you found out about a shopping app in any of these ways?

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=193)

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?

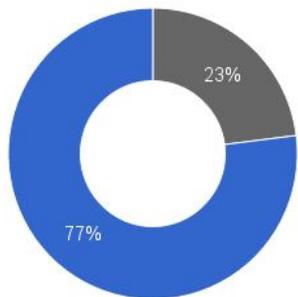
Reasons for downloading shopping apps



Base: 300

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

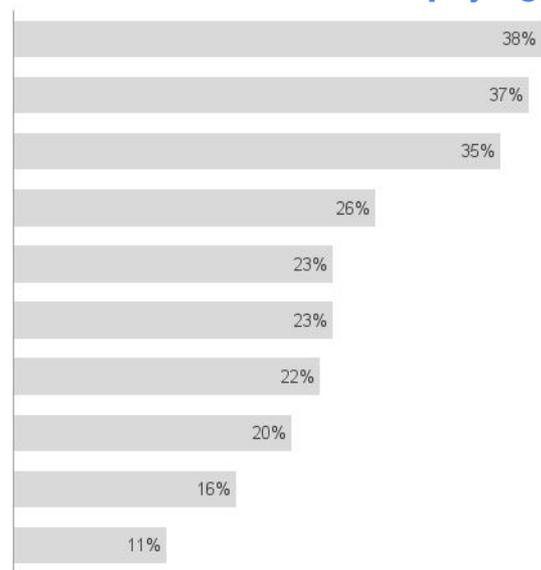
Reasons for paying for shopping apps



■ Never paid to download shopping app
■ Have paid to download shopping app

- It had the content I wanted
- I want an app that is ad free
- There were exclusive deals / discounts offered through the app
- The app had good reviews
- I'm a frequent user of the brand / company offering the app
- There were no free alternatives
- I thought it would be easier to use than free alternatives
- It offered features / functionality unavailable on the free alternatives
- I wanted to have the same app as my friends
- None of the above

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.

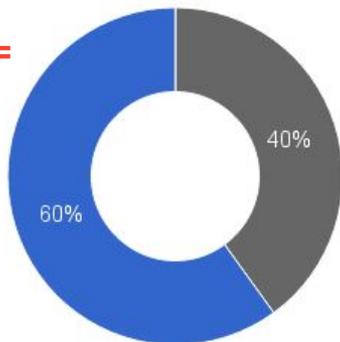
Base: Have paid to download a shopping app (n=230)

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

Smartphone spending for products/services

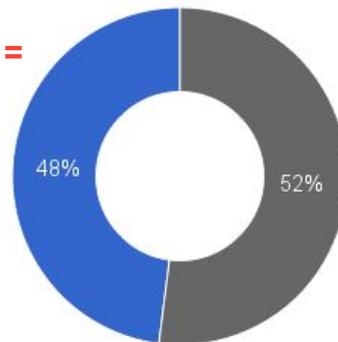
Past 3 months

Average* =
₹224.50



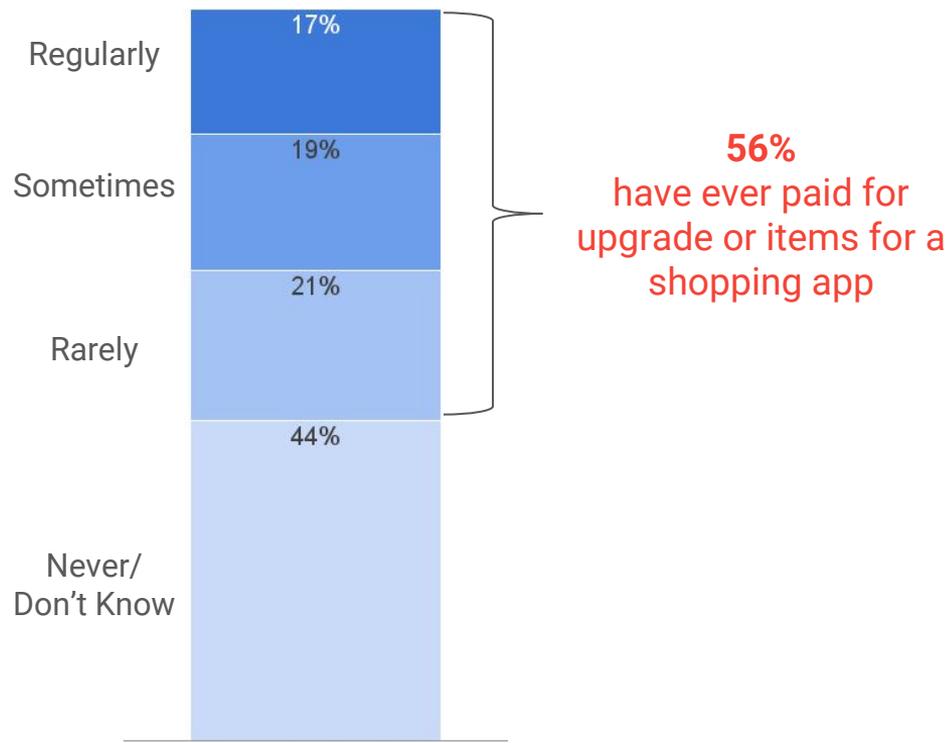
Past 7 days

Average* =
₹89.50



■ 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



Base: 300

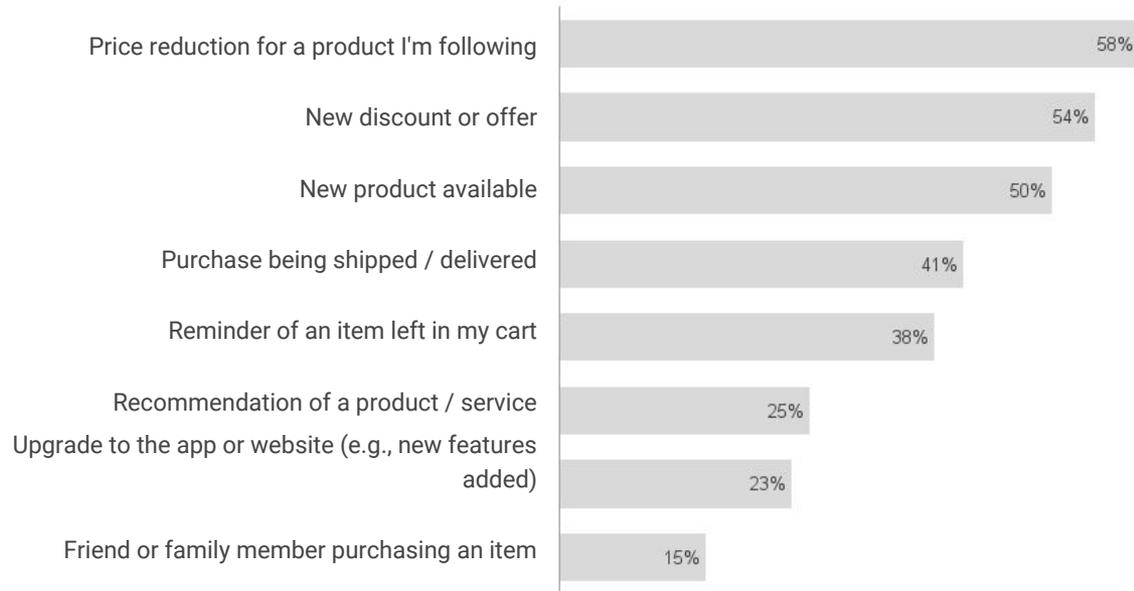
Q28. Thinking about all of the shopping apps that you use, which of the following features do you prefer to have?

Useful notifications on phone

94%

find shopping
notifications on
mobile **useful**

Most useful notifications



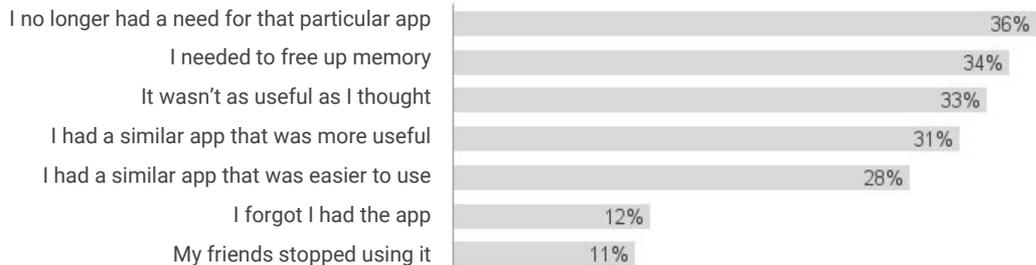
Base: 300

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?

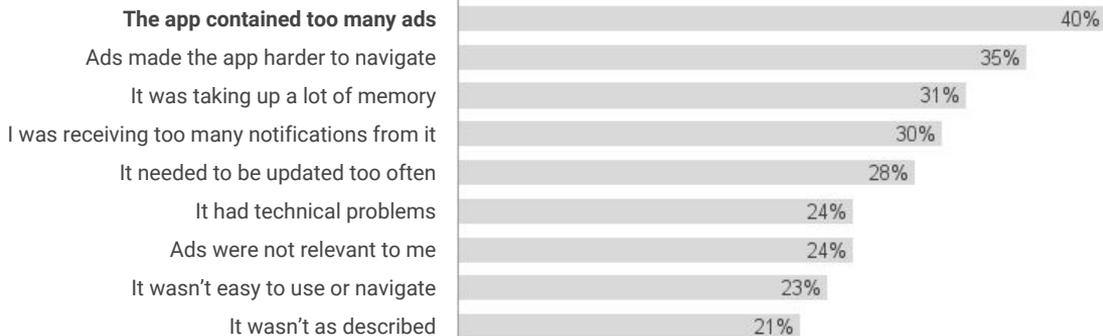
| Abandonment & re-engagement

Reasons for abandonment

Individual related



App related



Why no longer needed?

Other apps covered shopping needs
62%

Was using for one-off purchase
33%

No longer interested in the brand/company
26%

Base: 300

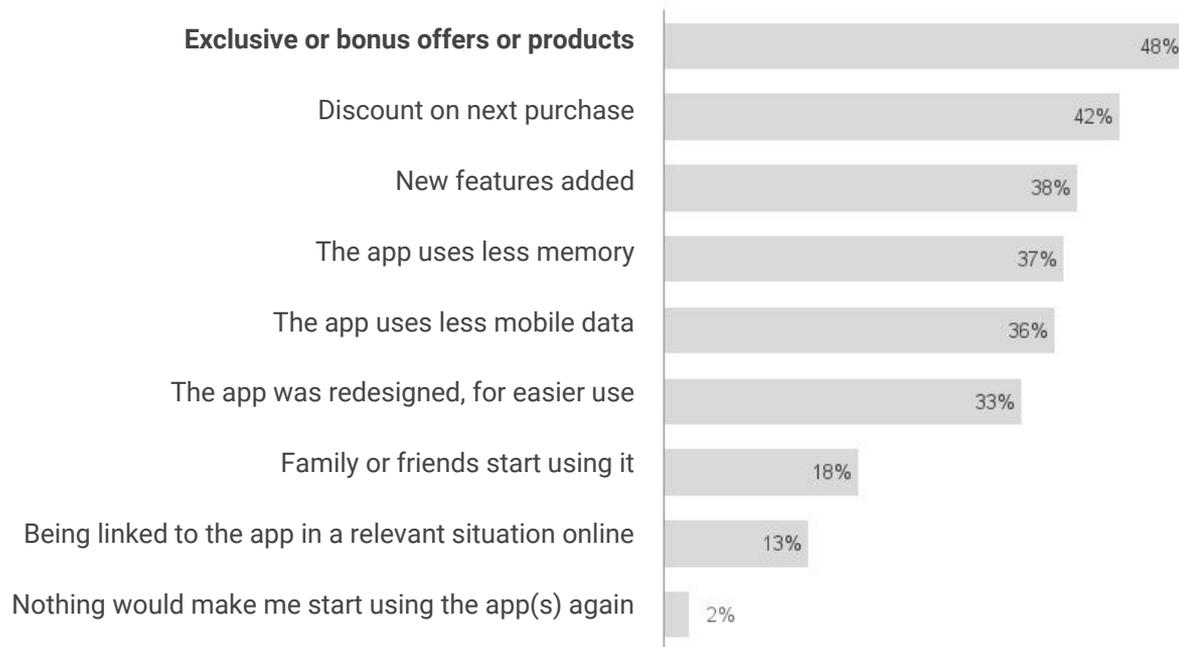
Q40. Have you stopped using shopping apps on your smartphone for any of the reasons below? Select all that apply.

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=107)

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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