
2016

MOBILE IN THE PATH TO PURCHASE:
CLOTHES & FOOTWEAR

Method & background

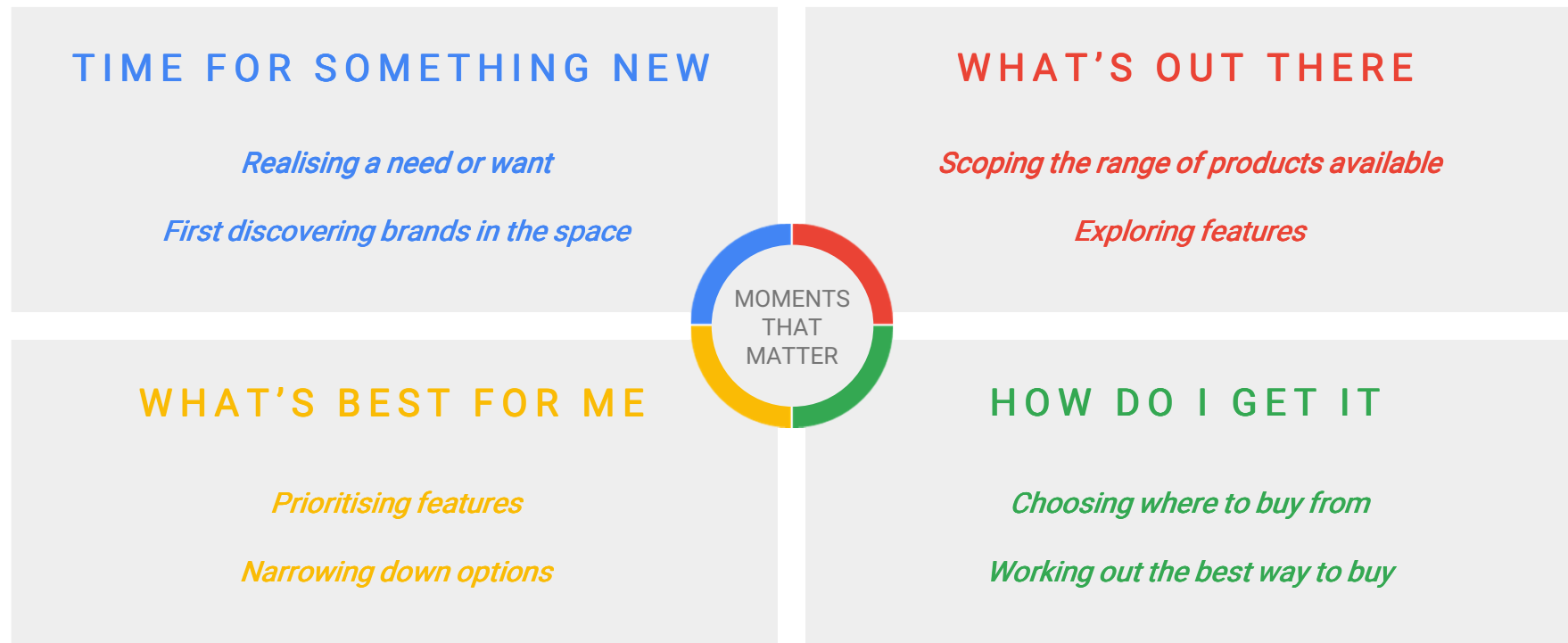
PURPOSE	SHOW HOW SMARTPHONES ARE USED FOR PRODUCT RESEARCH IN GENERAL AND IN MOMENTS THAT MATTER
UNIVERSE	ONLINE POP 16+ WHO HAVE PURCHASED THE RELEVANT PRODUCT WITHIN A SPECIFIC PERIOD OF TIME (VARIES BY PRODUCT)
SAMPLE SIZE	400 INTERVIEWS PER PRODUCT
PRODUCTS	SKIN CARE, CLOTHES & FOOTWEAR, HOME FURNISHING, LAPTOPS, CAR INSURANCE
METHOD	DEPENDING ON MARKET: ONLINE, MIXED MODE OR FACE-TO-FACE (SEE APPENDIX)

How to use this deck

ANALYSIS	THIS REPORT FOCUSSES ON ONE PRODUCT CATEGORY AND GIVES AN OVERVIEW OF KEY RESULTS AND KEY OPPORTUNITIES
AGGREGATED KPIs	SOME RESULTS SHOWN IN THIS REPORT ARE AGGREGATED NUMBERS FROM DIFFERENT QUESTIONS IN THE RESEARCH, PLEASE SEE APPENDIX FOR HOW THEY ARE CALCULATED
AUTOMATION	THIS REPORT IS AUTOMATICALLY GENERATED PER PRODUCT AND SOME STORY-TELLING MAY BE NEEDED TO ACCOMPANY THE CHARTS
TABLES	THIS REPORT ONLY SHOWS A SNAPSHOT OF THE AVAILABLE RESULTS, PLEASE REVIEW THE EXCEL BANNERBOOKS OR SPSS FILE FOR MORE INFORMATION
BASES	WEIGHTED BASES ARE SHOWN, IF BASE IS BELOW 30 CHART NUMBERS ARE NOT SHOWN

How to use this deck

THIS REPORT PROVIDES AN OVERVIEW OF WHAT BUYERS ARE LOOKING FOR IN **MOMENTS THAT MATTER**:



How to use this deck

Chapter I:
CONSUMER JOURNEY SNAPSHOT

Chapter II:
HOW MOBILE
influences the purchase journey

Chapter III:
WHY MOBILE
is useful in the purchase journey

Chapter IV:
KEY OPPORTUNITIES



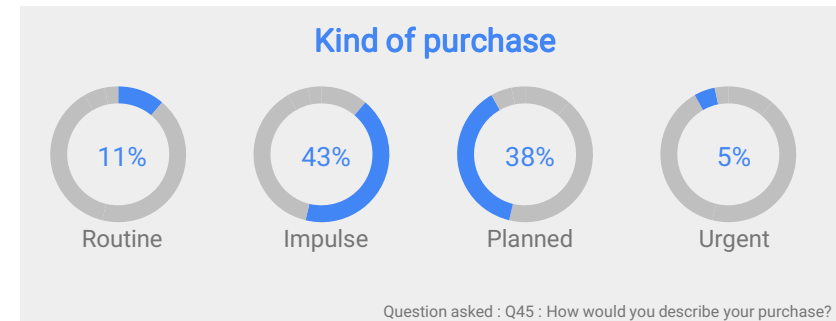
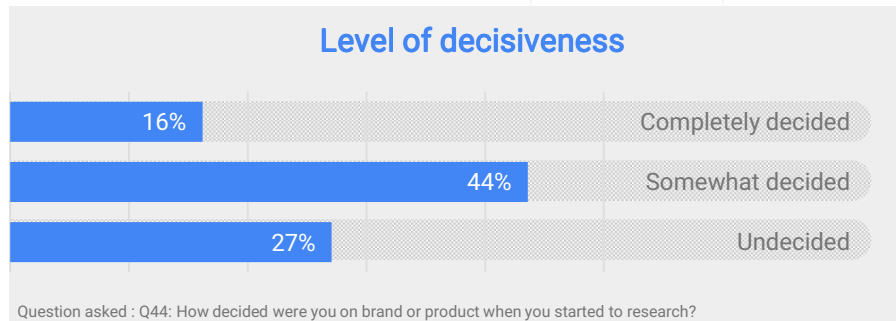
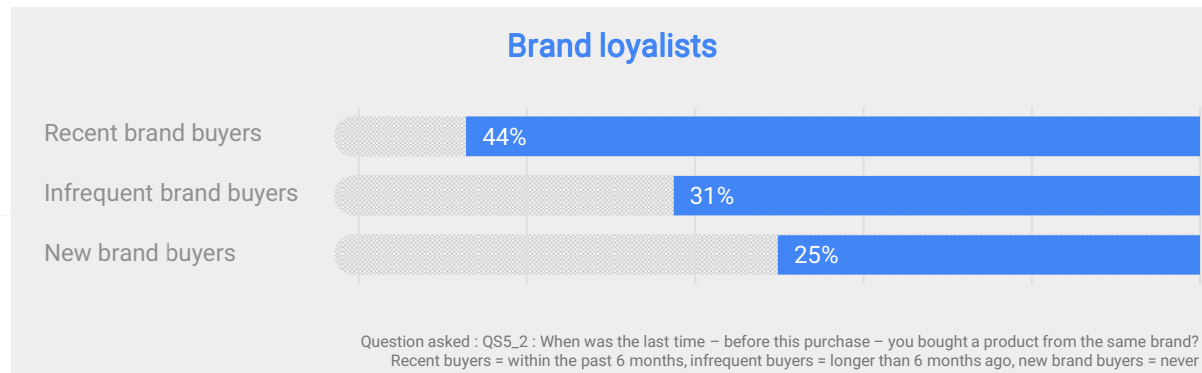
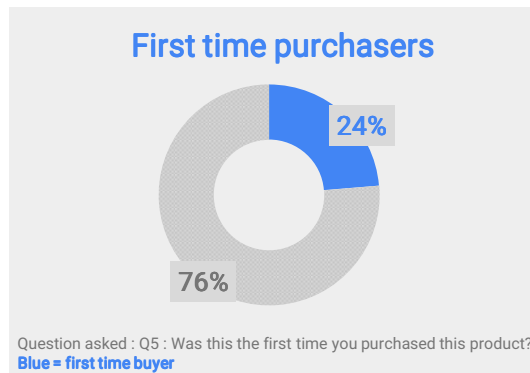
| DE

| CLOTHES & FOOTWEAR

CHAPTER I

CONSUMER JOURNEY SNAPSHOT

Key characteristics of the consumer journey



Length of the journey



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Question asked : Q43 : How much time passed between starting to collect information and actually purchasing the product?
Base: All product buyers, n=502
Source: Mobile in the Path to Purchase survey 2016

Length of the journey



DE

CLOTHES & FOOTWEAR

Question asked : Q43 : How much time passed between starting to collect information and actually purchasing the product?
Base: All product buyers / All buyers who researched on smartphone, n=502 / n=135
Source: Mobile in the Path to Purchase survey 2016

Use of smartphones for research and purchase



60%

RESEARCHED
ONLINE

31%

RESEARCHED ON
SMARTPHONE

40%

PURCHASED
ONLINE

4%

PURCHASED ON
SMARTPHONE

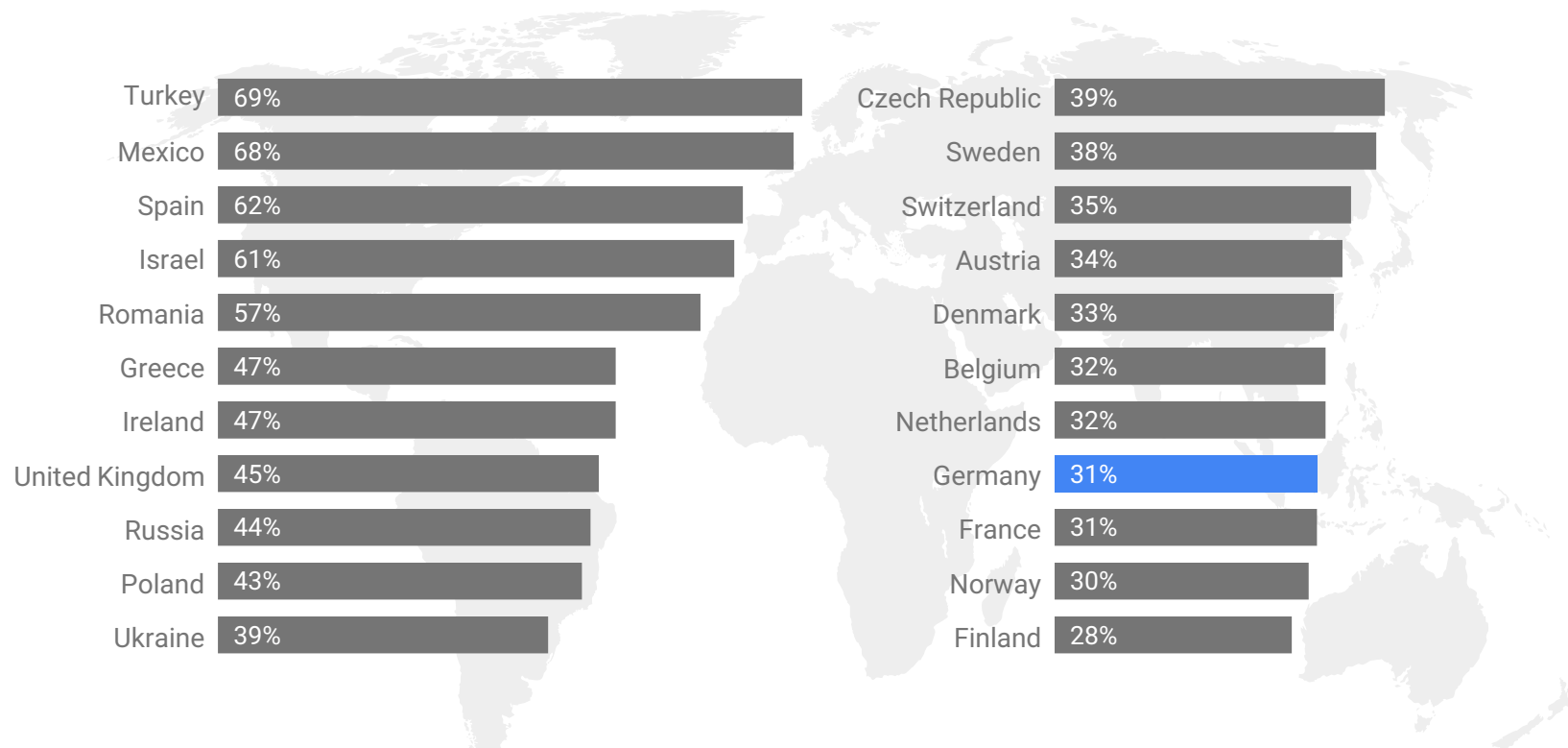


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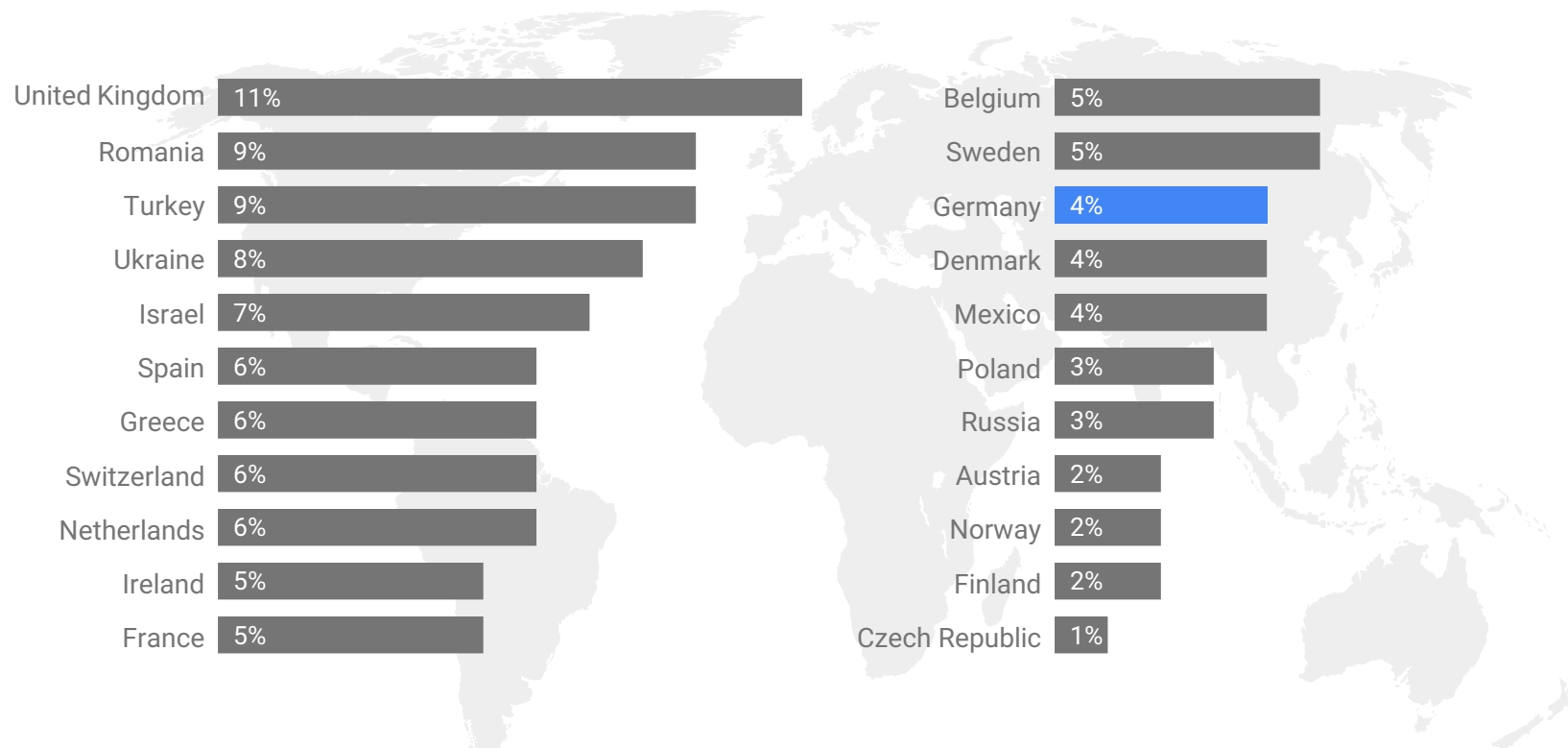
CLOTHES & FOOTWEAR

Question asked : Q16-19.3 : Touch points used // Touch points used via smartphone // Q10 : How did you buy?
Base: All product buyers, n=502
Source: Mobile in the Path to Purchase survey 2016

Use of smartphone to research – market comparison



Use of smartphone to purchase – market comparison



CHAPTER II

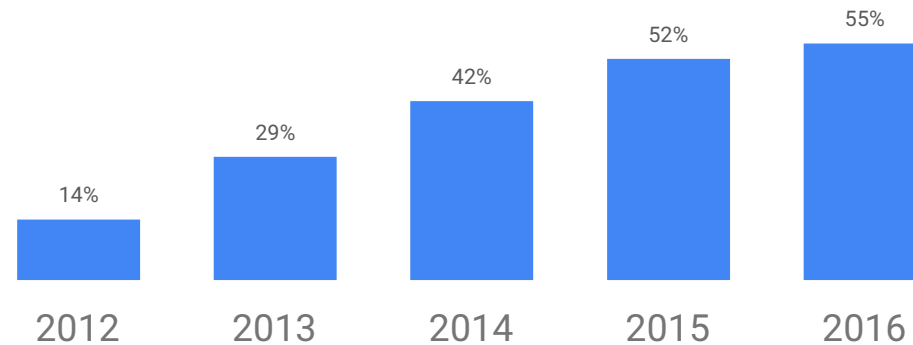
HOW MOBILE INFLUENCES THE PURCHASE JOURNEY

Smartphone use in the population

79%

OF PEOPLE 16+ USE A
SMARTPHONE

% online pop who access the internet via smartphone at
least as often as via desktop computer





31%

RESEARCHED THE PRODUCT ON THEIR
SMARTPHONE



Google

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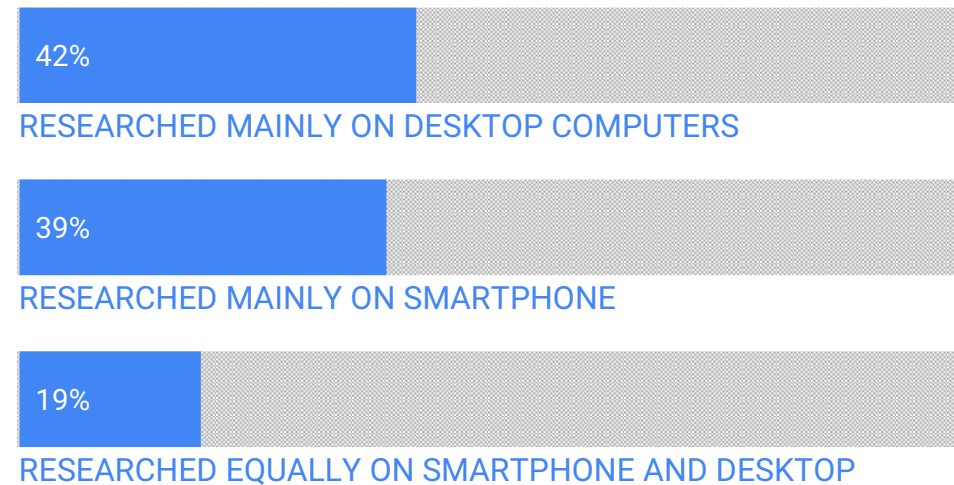
| CLOTHES & FOOTWEAR

Question asked : 19.1_2_3 : Touch points used via smartphone
Base: All product buyers, n=502
Source: Mobile in the Path to Purchase survey 2016

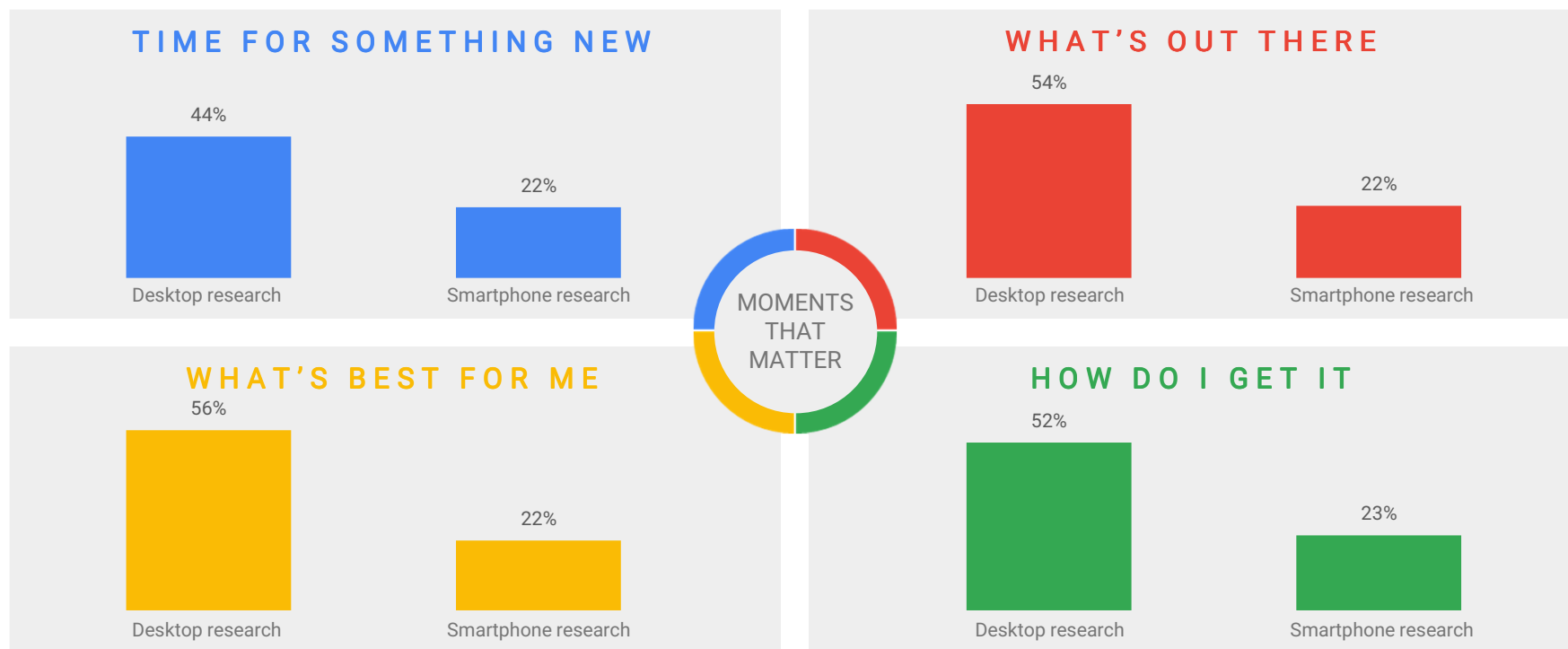
Using smartphones with other devices for product research



Of the **20%*** who researched on
smartphone and at least one other device...



On device product research in key moments

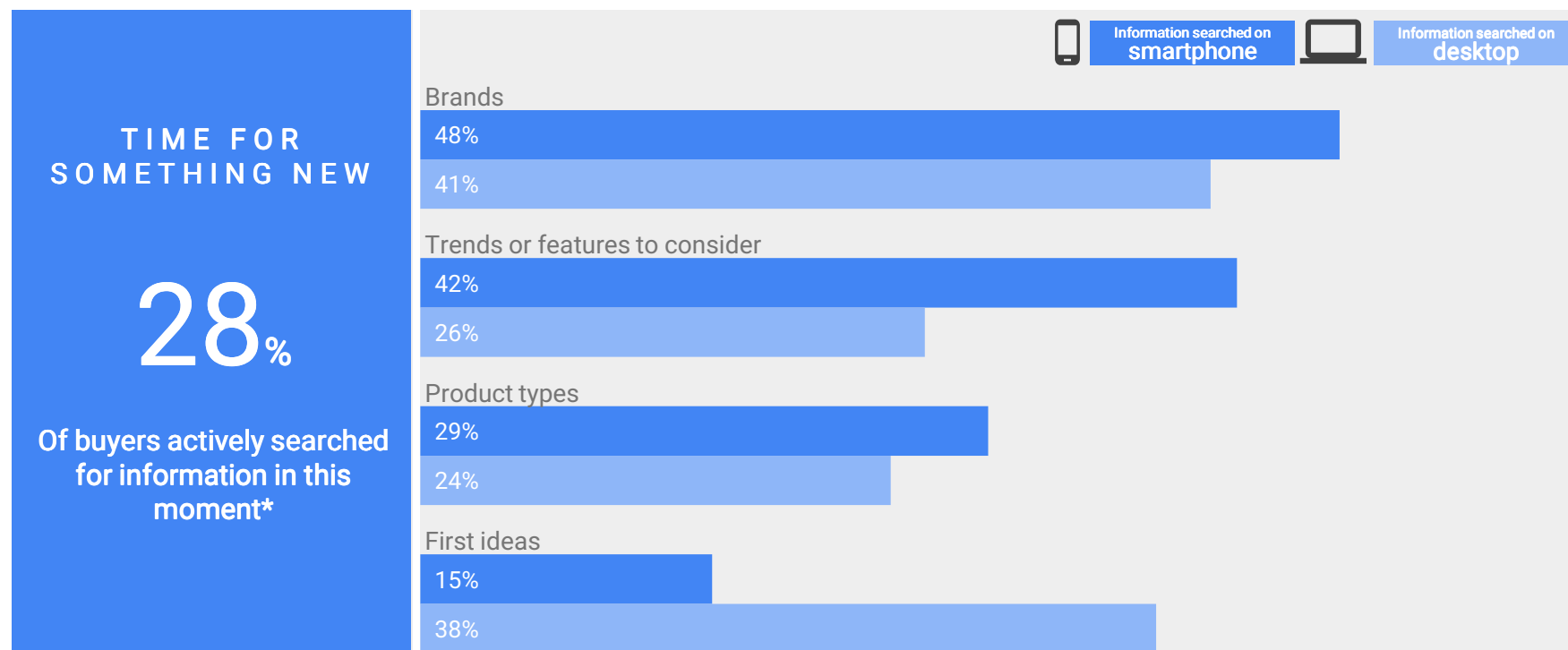


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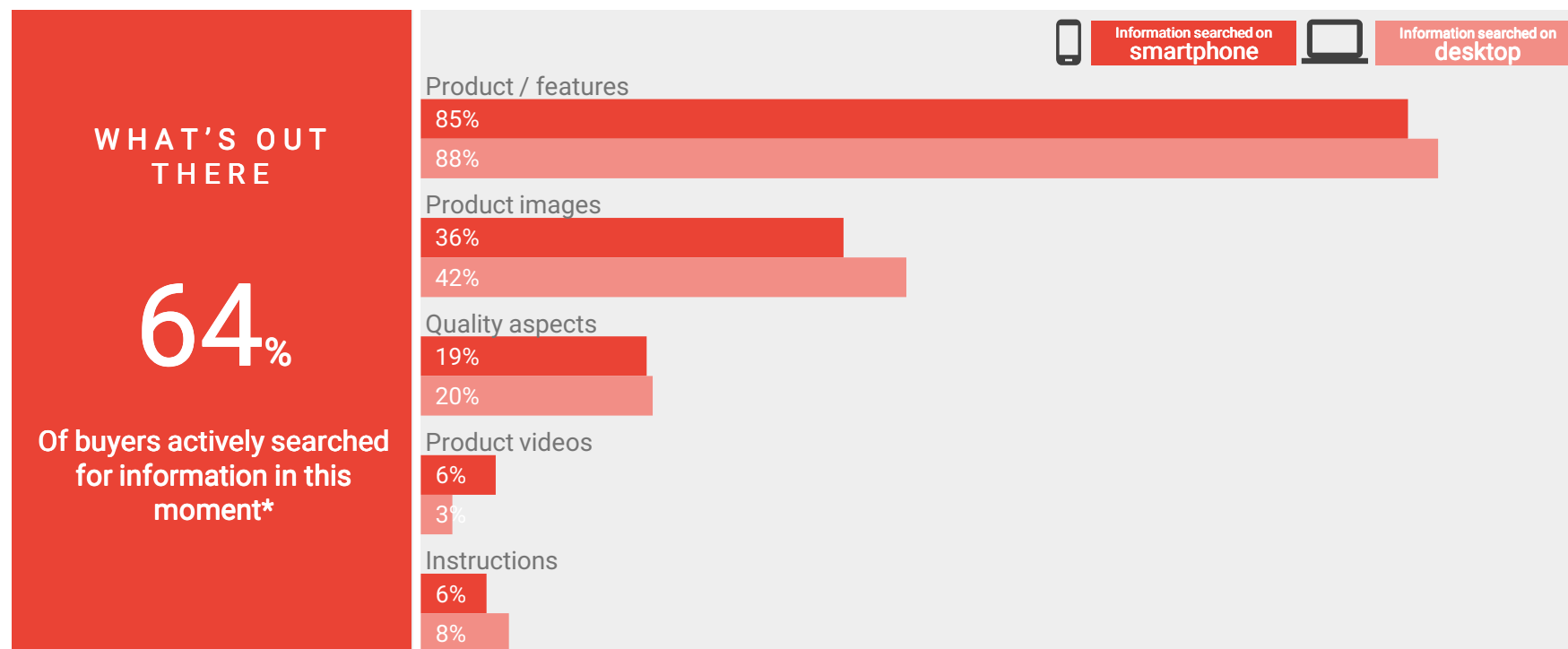
CLOTHES & FOOTWEAR

Question asked : Q24 / Q25 : Which information did you look for on your <device>?
Base: All product buyers who actively researched in each moment,
n= 140 / n= 324 / n= 254 / n= 259
Source: Mobile in the Path to Purchase survey 2016

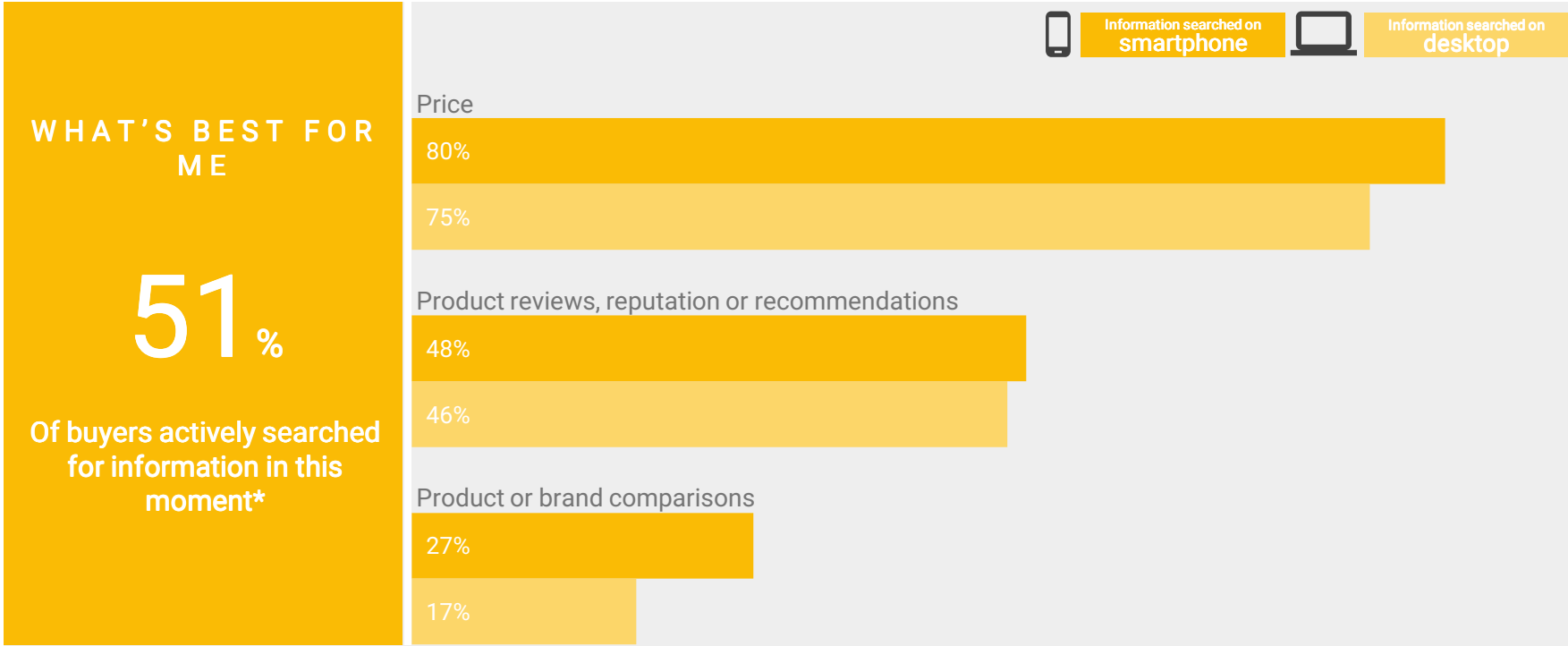
Information searched for, by device



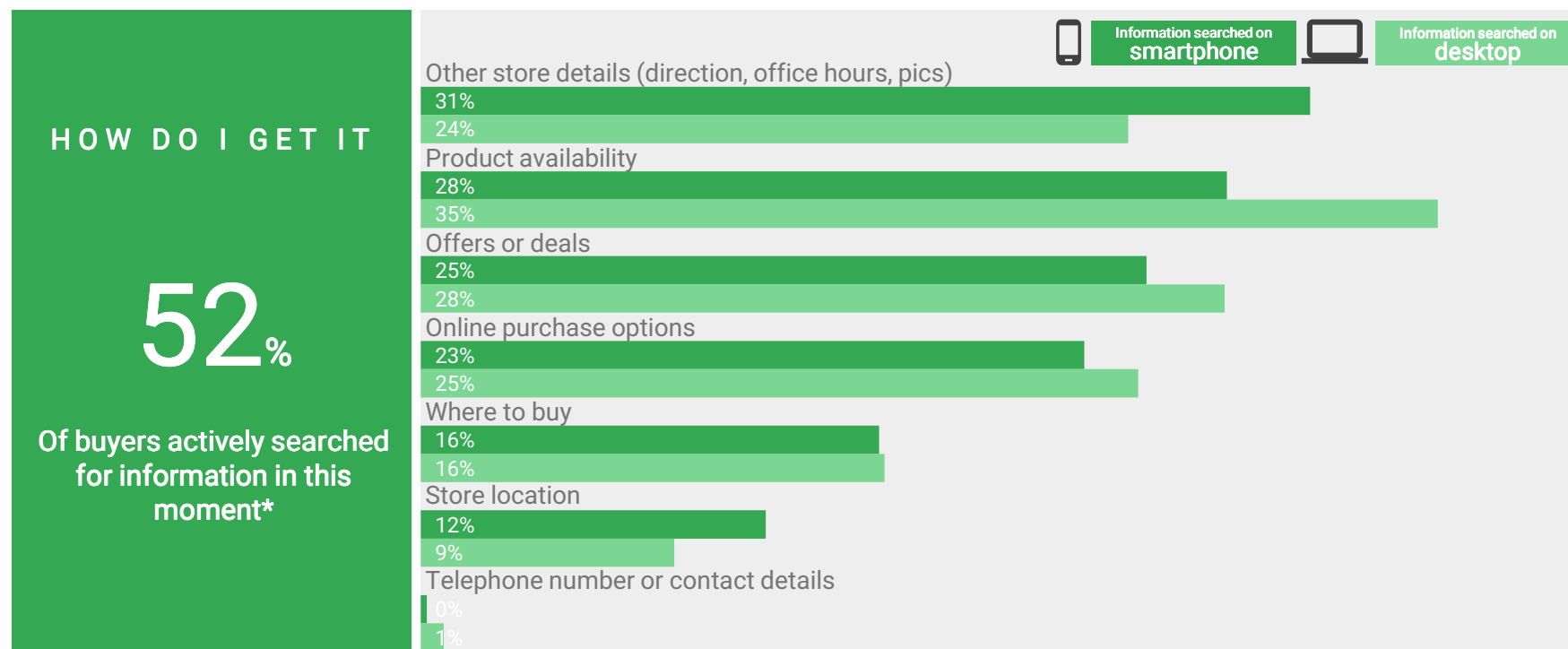
Information searched for, by device



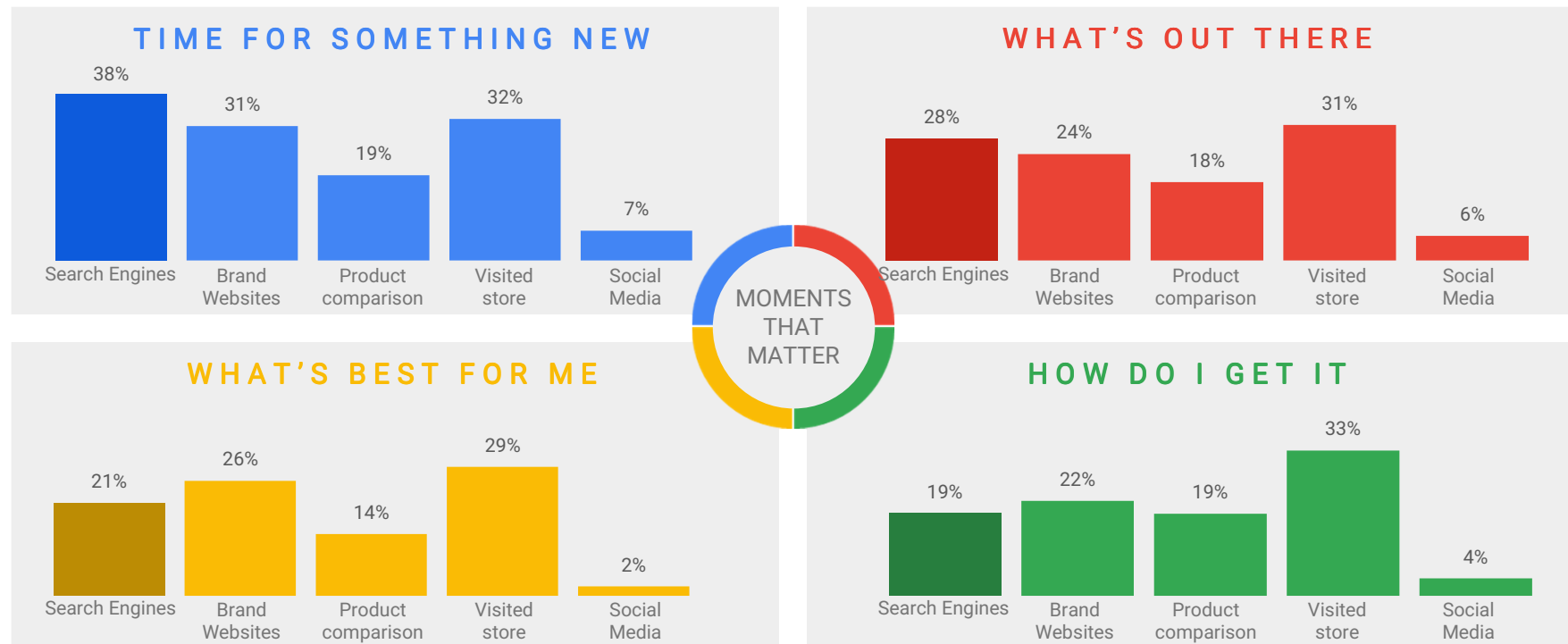
Information searched for, by device



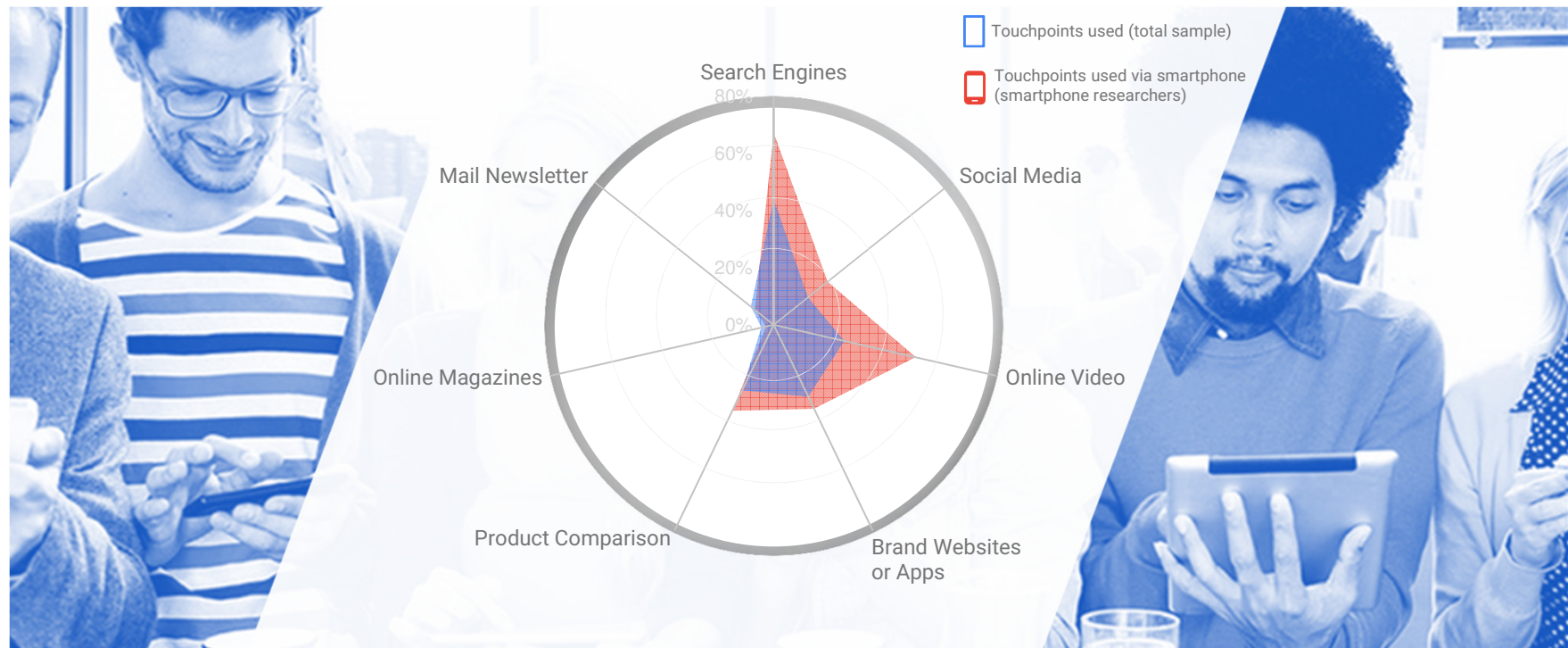
Information searched for, by device



Touchpoints used for research in key moments



Touchpoints used, by device





WATCHED ONLINE VIDEO ABOUT THE PRODUCT ON THEIR SMARTPHONE

Journeys that involve smartphones tend to be more complex

CROSS-DEVICE RESEARCHERS	7.7	5.8	52%	46%	51%
	TOUCHPOINTS USED ON AVERAGE	ONLINE TOUCHPOINTS USED ON AVERAGE	RESEARCHED IN-STORE	PURCHASED IN-STORE	RESEARCHED ONLINE BEFORE PURCHASED OFFLINE
DESKTOP ONLY RESEARCHERS	3.8	2.9	36%	35%	31%

Meta analysis across all 5 products: skin care, clothing & footwear, home furnishing, laptop, car insurance due to sample size. Cross device researchers = buyers who researched on their smartphone and a desktop device or tablet. Desktop only researchers = buyers who research on a desktop device or tablet but no smartphone.

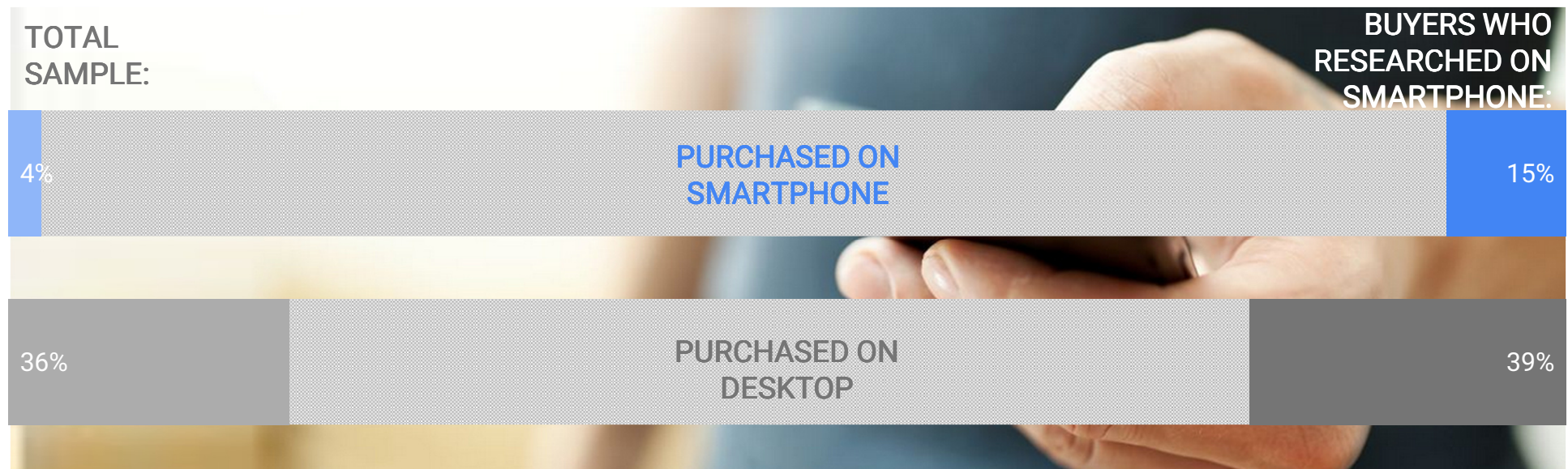


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CLOTHES & FOOTWEAR

Question asked : Q16-18 / 22 / 10 : How did you buy?
Base: All product buyers who did cross-device research / who did mono-device research, n=599 / n=547
Source: Mobile in the Path to Purchase survey 2016

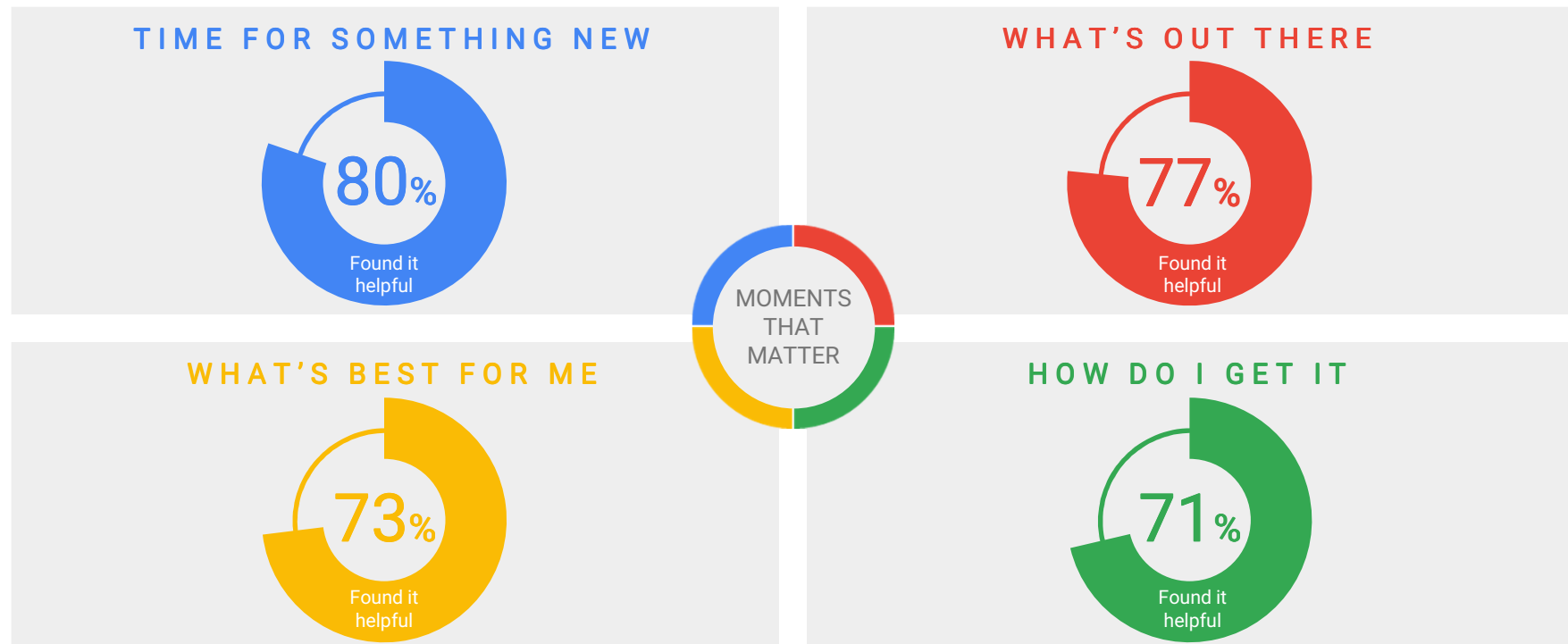
How smartphone influences online purchase



CHAPTER III

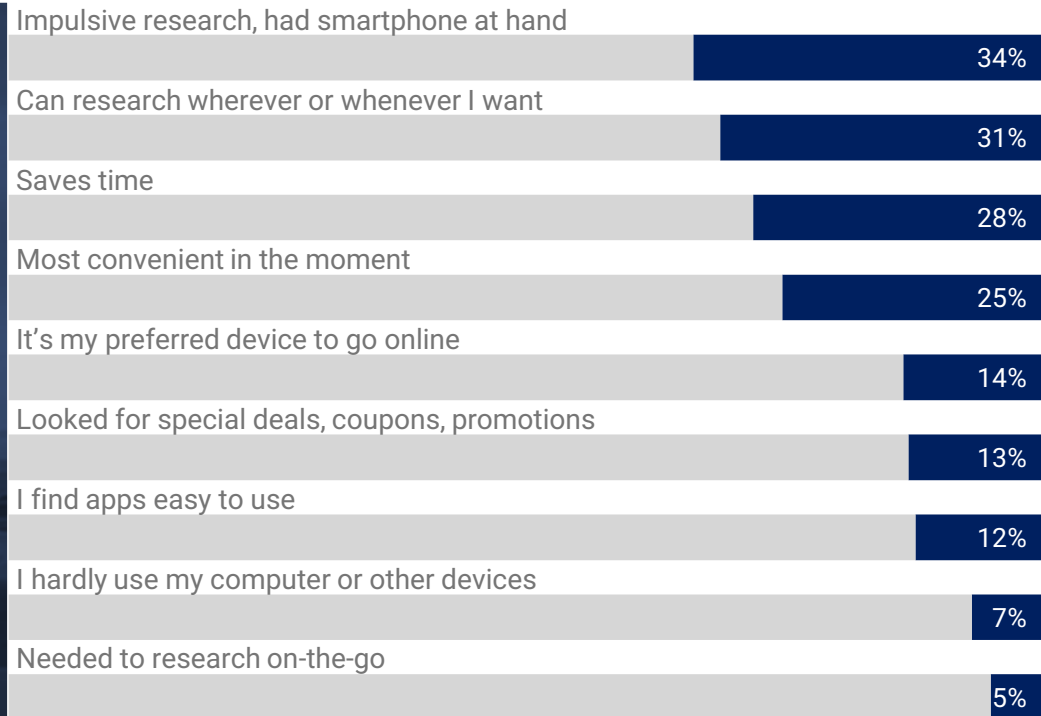
WHY MOBILE IS USEFUL IN THE PURCHASE JOURNEY

Value of smartphone research in key moments

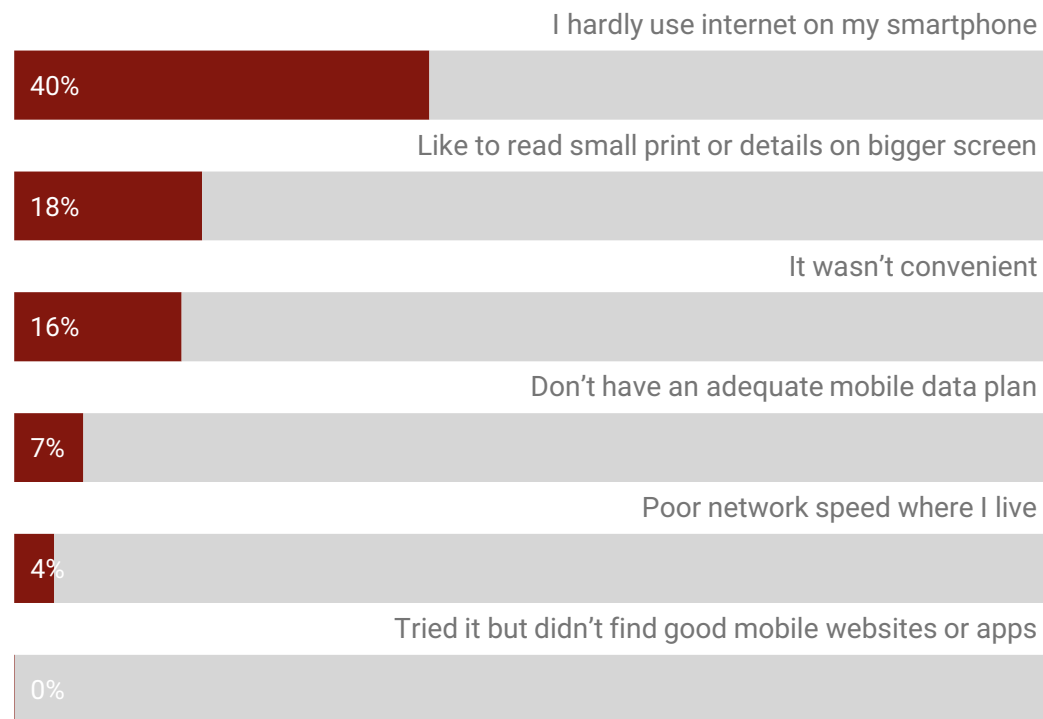


Reasons to use smartphone for research

**SPONTANEITY &
TIME SAVING
ARE MAIN
BENEFITS OF
SMARTPHONE
PRODUCT
RESEARCH**

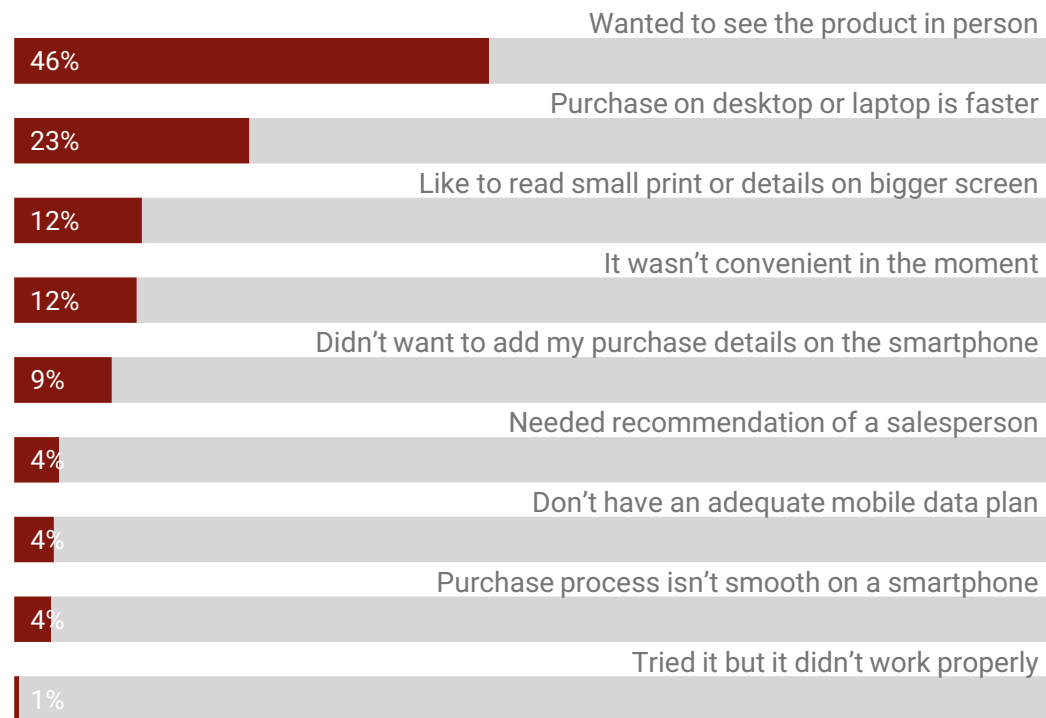


Barriers to using smartphone for research



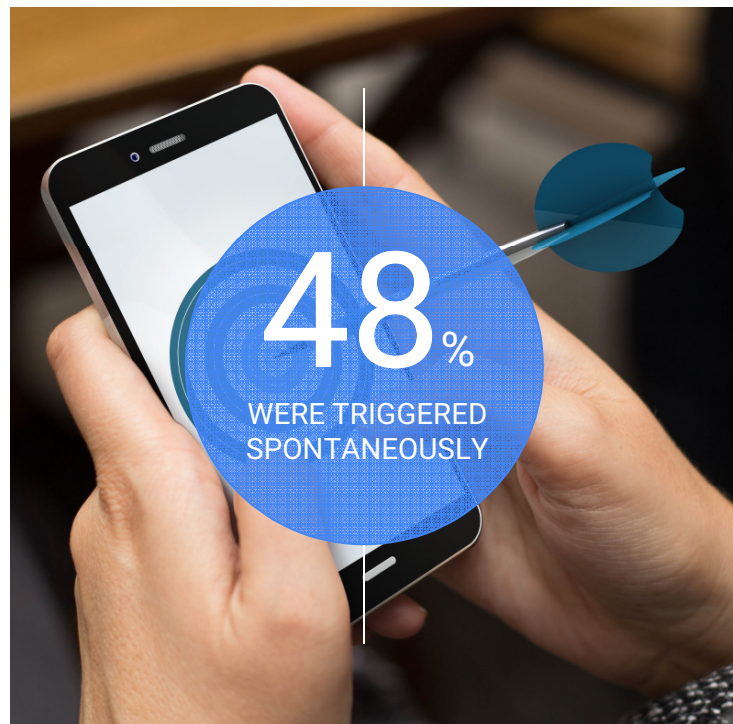
**LACK OF
CONVENIENCE,
HABITS AND
DEMAND TO
READ ON BIG
SCREEN ARE
MAIN BARRIERS**

Barriers to using smartphone to purchase



SMARTPHONE
PURCHASE
LACKS IN-
PERSON
PRODUCT
EXPERIENCE

Triggers to turn to smartphone for research



Noticed something when I went online anyway

15%

Planned research time

12%

To kill time in between tasks

10%

Noticed something about it

8%

Noticed or saw advertising for it

8%

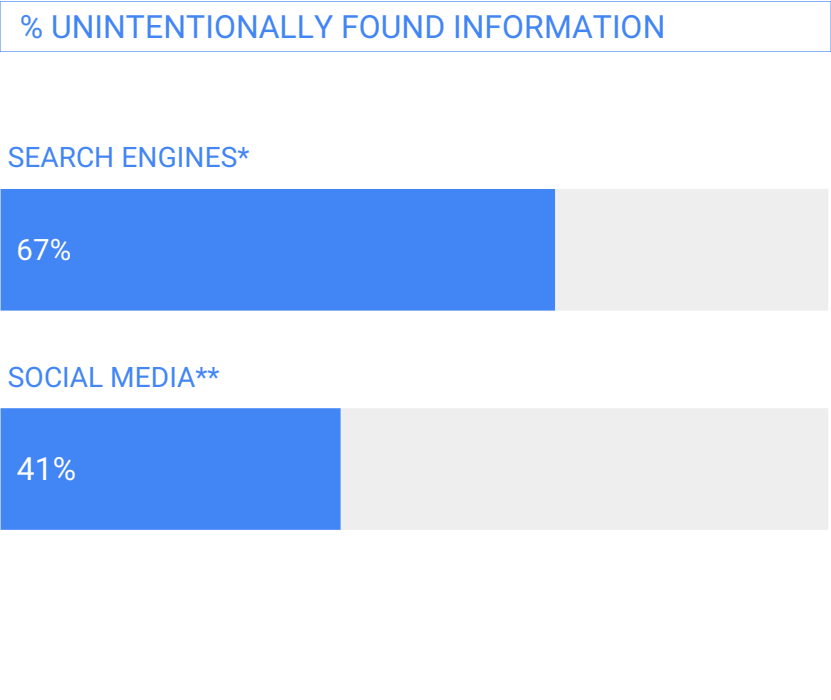
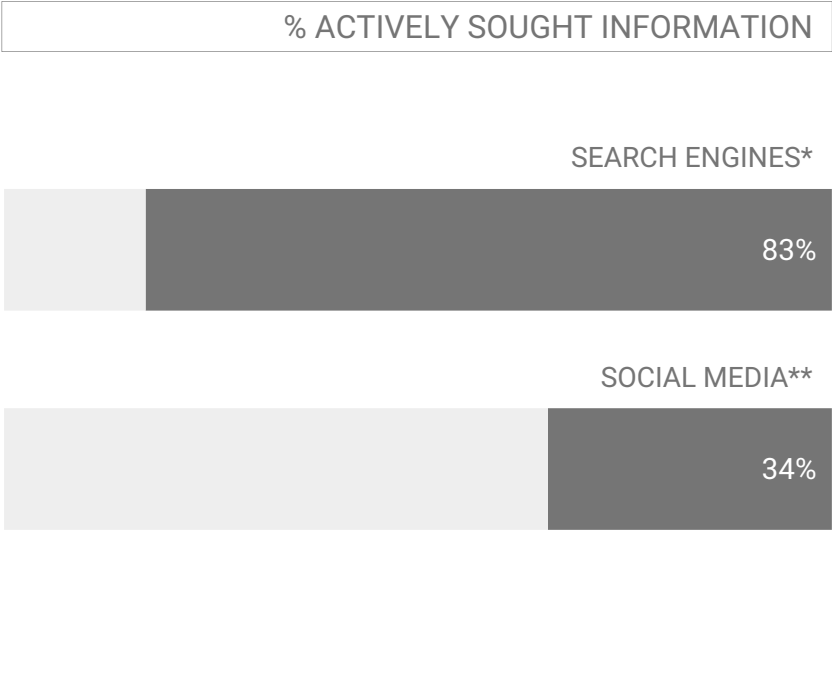
Something others told me about it

3%

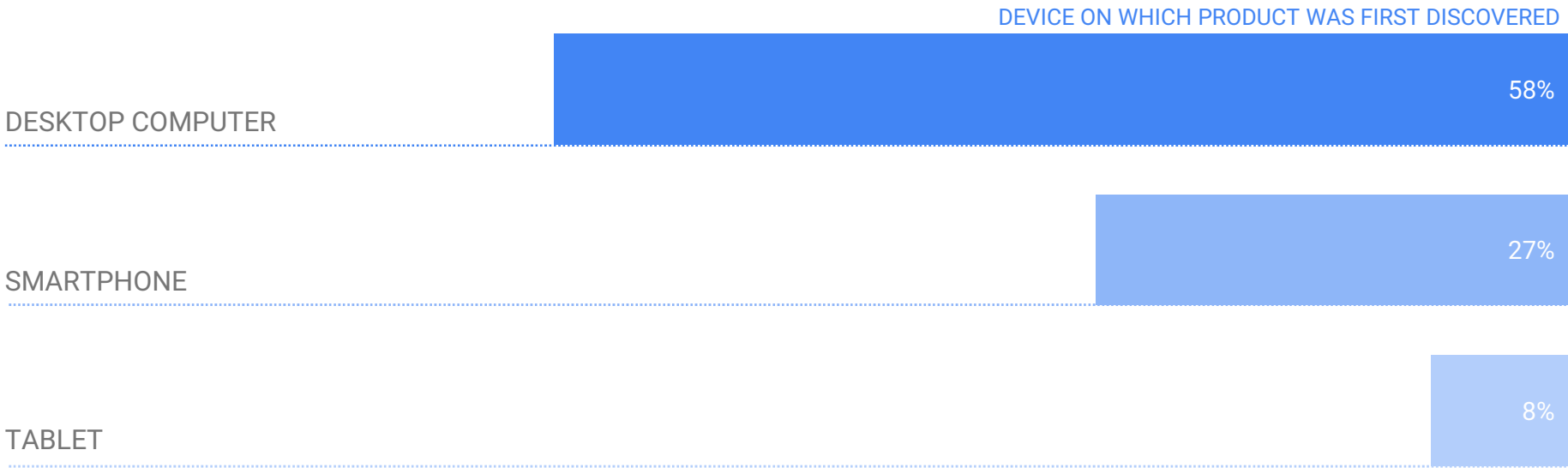
CHAPTER IV

KEY OPPORTUNITIES

Key opportunity #1 – search shows intent, while social is more for passive discovery



Key opportunity #2 – smartphones can drive early product discovery

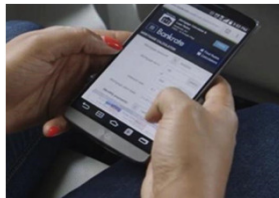


Key opportunity #3 – search and video on smartphone are important influences in the journey



67%

USED A SEARCH ENGINE VIA SMARTPHONE DURING RESEARCH



51%

WATCHED ONLINE VIDEO VIA SMARTPHONE DURING RESEARCH



TNS

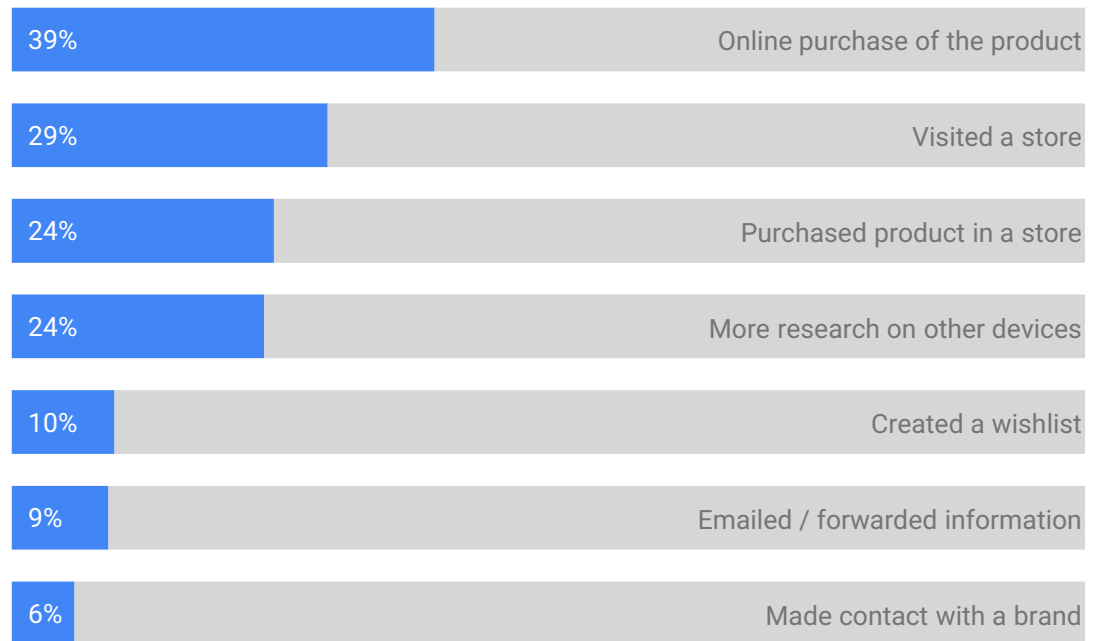
Google

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CLOTHES & FOOTWEAR

Question asked : Q19.2 Which of these specific websites or apps did you use on your smartphone to inform your purchase? // 19.3: On which of the following websites or apps did you watch online videos to learn about the product you purchased?
Base: All product buyers who researched on smartphone, n=135
Source: Mobile in the Path to Purchase survey 2016

Key opportunity #4 – exposure to messaging via smartphone drives lower funnel actions

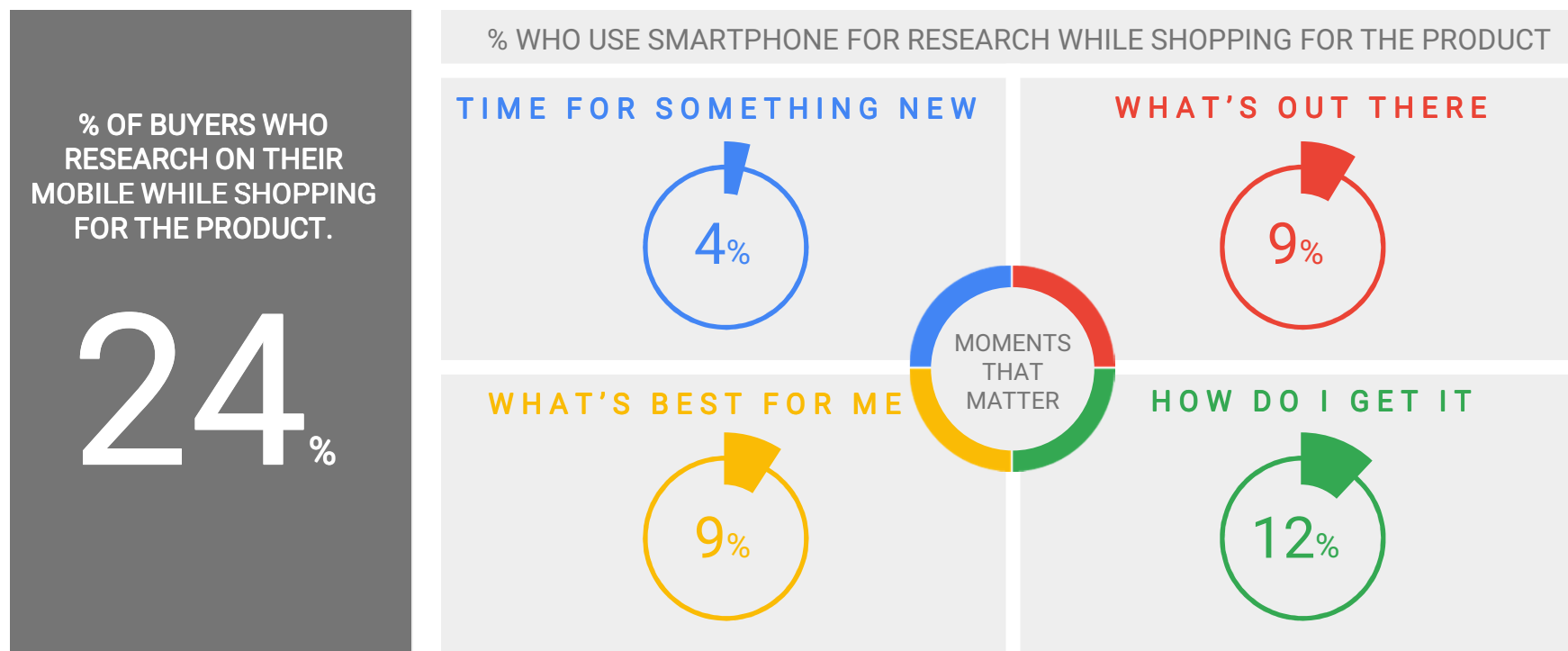


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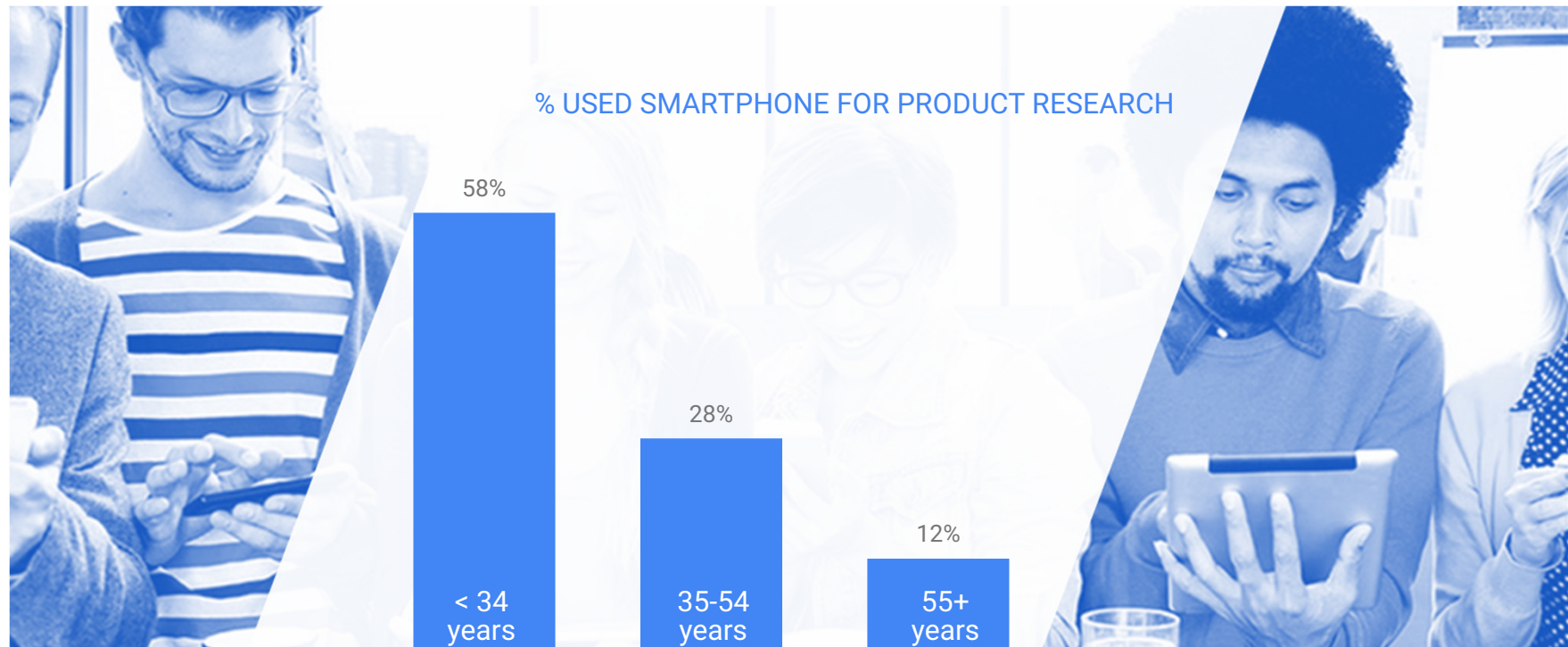
CLOTHES & FOOTWEAR

Question asked : Q40 : Did something you saw or read about the product on your smartphone lead you to any of the actions below?
Base: *All product buyers who researched on smartphone / All product buyers who did a follow-up action after smartphone research, n=155 / n=110
Source: Mobile in the Path to Purchase survey 2016

Key opportunity #5 – smartphones provide opportunities to influence just before a physical purchase



Key opportunity #6 –while all ages use smartphone research, there's an opportunity to renew the buyer cycle via mobile



Google

DE

CLOTHES & FOOTWEAR

Question asked : Q19.1_2_3 : Did you use your smartphone for researching the product?
Base: All product buyers, n=144 / n=177 / n=181
Source: Mobile in the Path to Purchase survey 2016

Key opportunity #7 – smartphone research can leverage other media

WHILE WATCHING TV

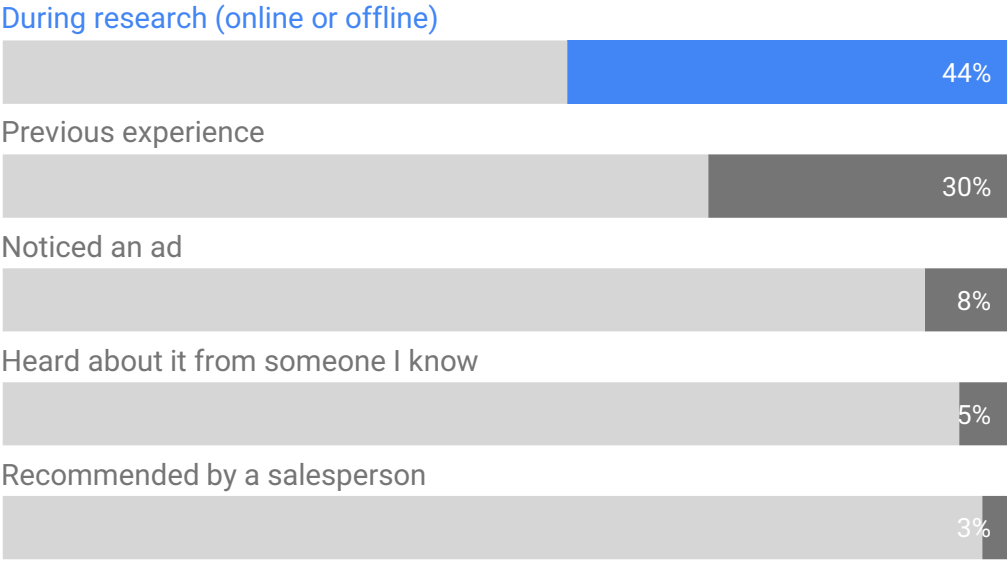


WHILE LISTENING TO RADIO OR OTHER MEDIA

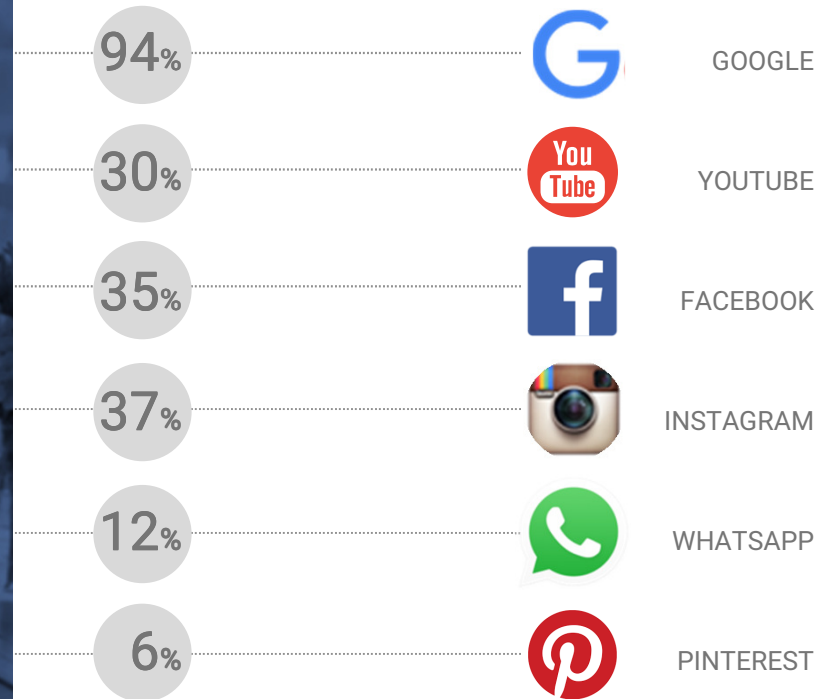


APPENDIX

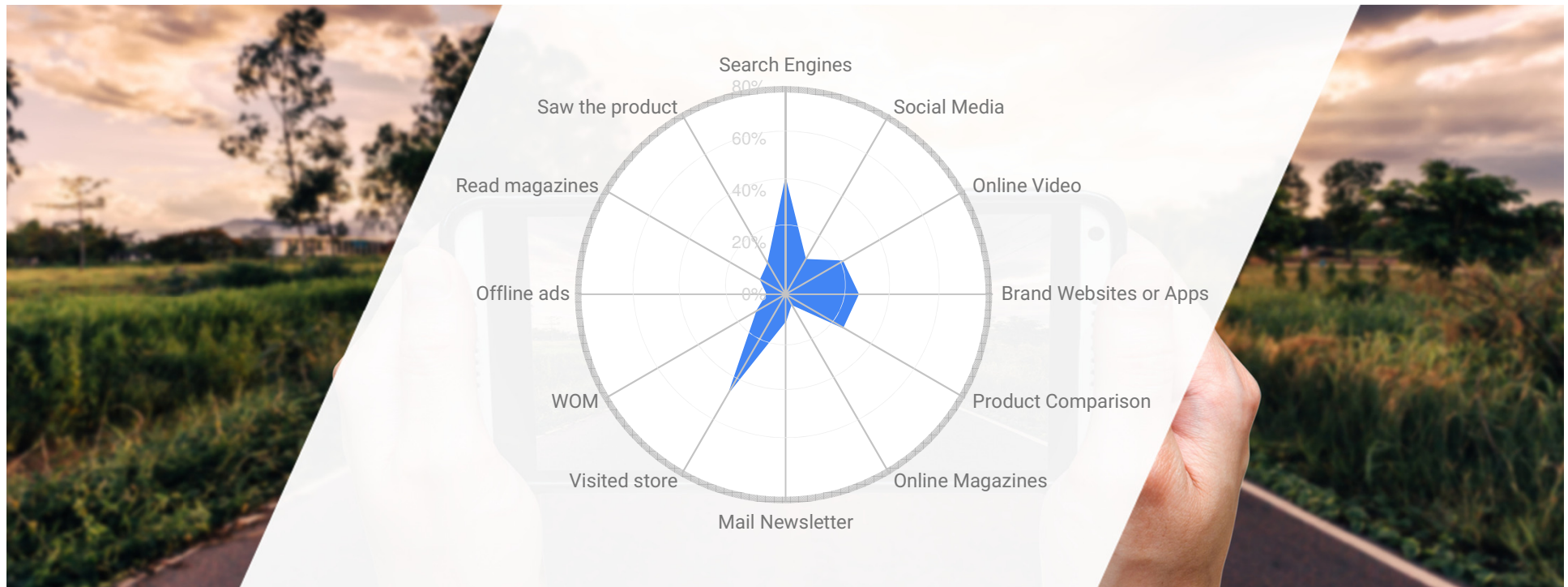
First discovery



Use of search and social for product research on smartphone



Use of online & offline touchpoints for research



Calculation of aggregated KPIs

ONLINE RESEARCH	AGGREGATED RESULTS, NUMBERS ARE TAKEN FROM QUESTIONS 16, 17 AND 18
SMARTPHONE RESEARCH	AGGREGATED RESULTS, NUMBERS ARE TAKEN FROM QUESTIONS 19.1, 19.2 AND 19.3
OFFLINE RESEARCH	AGGREGATED RESULTS, NUMBERS ARE TAKEN FROM QUESTION 22
MOMENT RESEARCH	AGGREGATED RESULTS, NUMBERS ARE TAKEN FROM QUESTION 23 BY ASSIGNING DIFFERENT INFORMATION NEEDS TO THE FOUR RESEARCH MOMENTS SHOWN IN THE REPORT



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