

Mobile In-Store Research

How in-store shoppers are using mobile devices

April 2013



Google[™] Shopper
Marketing Council



Research created in conjunction with:

Google Shopper Marketing Agency Council

The Google Shopper Marketing Agency Council is a group of recognized shopper marketing experts, well-known for advancing client's brands along the digital path-to-purchase. This group, in collaboration with Google, seeks to ignite digital thought leadership among Shopper Marketers. The council is focused on driving digital shopper thought leadership, cultivating insightful research, and developing transformational toolkit solutions for marketers. Follow us on Google+ for more information.

Core Council members include:



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SVP, Target Team Leader, Catapult/RPM



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SVP, TBWA/Digital Arts Network, The Integer Group



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SVP Shopper Marketing & Experiential, The Marketing Arm



Methodology

Background: Research collaboration with Google, M/A/R/C Research, and top shopper marketing agencies to uncover the role & opportunities for mobile in the shopping experience.

Qualitative

Used to inform quantitative:

5 Shop-along ethnographies

4 Bulletin Boards

20 Self-Ethnographies

Q3 Timing: 2012

Quantitative

Timing: Q4 2012

1,507 smartphone owners who use mobile devices for shopping, completed a 3 part survey for a shopping trip.



General Habits & Profiling

In-Store Activities

Shopping Trip Reflections

Methodology

62%

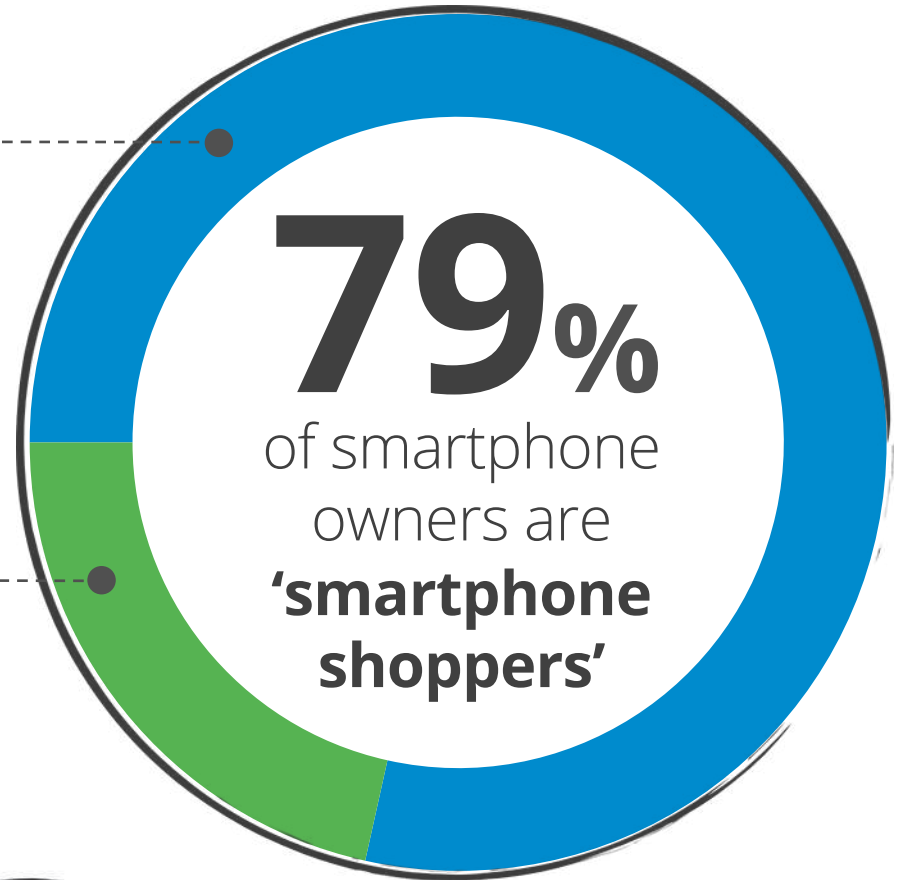
Standard smartphone shoppers, defined as:

Using a smartphone to assist with shopping at least once a month or more.

17%

Frequent smartphone shoppers, defined as:

1. Use mobile to assist in shopping at least once a week.
2. Agree highly:

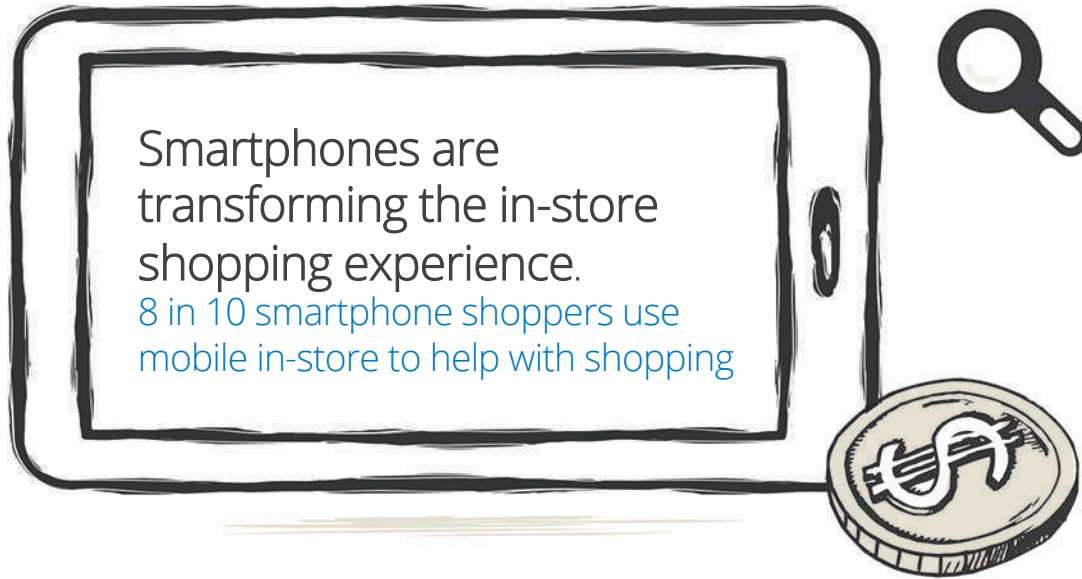


"Use my mobile to make everyday tasks easier."

"Use my mobile to research products."

"Routinely look for new mobile apps."

Key Takeaways



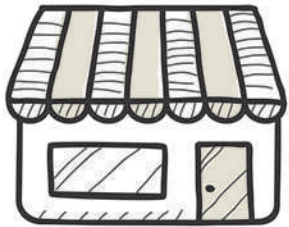
Smartphones are transforming the in-store shopping experience.
8 in 10 smartphone shoppers use mobile in-store to help with shopping

Mobile search is the starting point.

Instead of going directly to a site or app, 82% of shoppers use search engines for browsing product information while in-store.

Shoppers who use mobile more, spend more in-store.

Frequent mobile shoppers spend 25% more in-store than people who only occasionally use a mobile phone to help with shopping.



The retail landscape is evolving for all industries.

Mobile use in stores is not category specific
- Nearly 2/3 of baby product shoppers compare prices in-store.

Research Sections



Section 1

Mobile influences the path to purchase & increases basket sizes



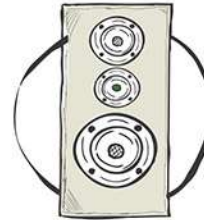
Section 3

Shoppers rely on search for product information



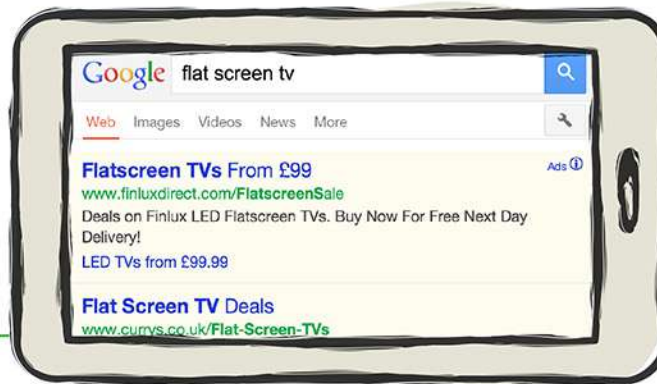
Section 2

Mobile empowers shoppers



Section 4

Shoppers use mobile devices across all product categories



Mobile influences the path to purchase & increases basket sizes



90% of smartphone shoppers use their phone for pre-shopping activities

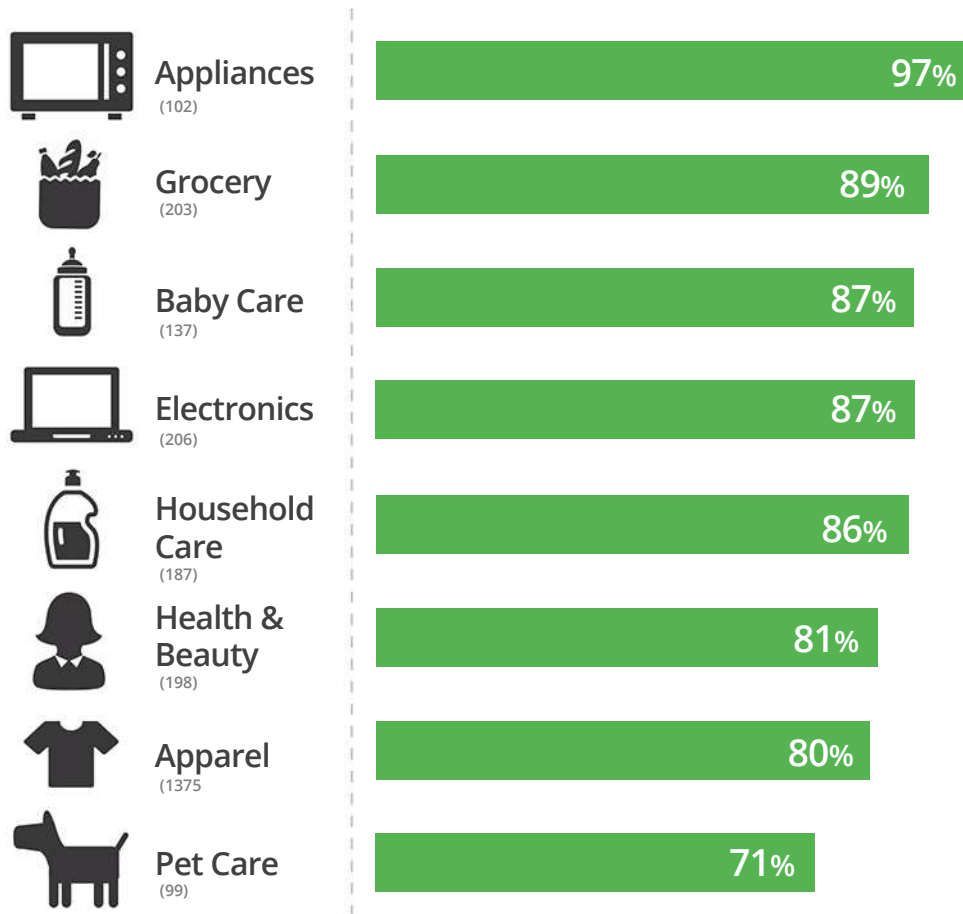




84%

of smartphone shoppers
use their devices to help
shop **while in a store**

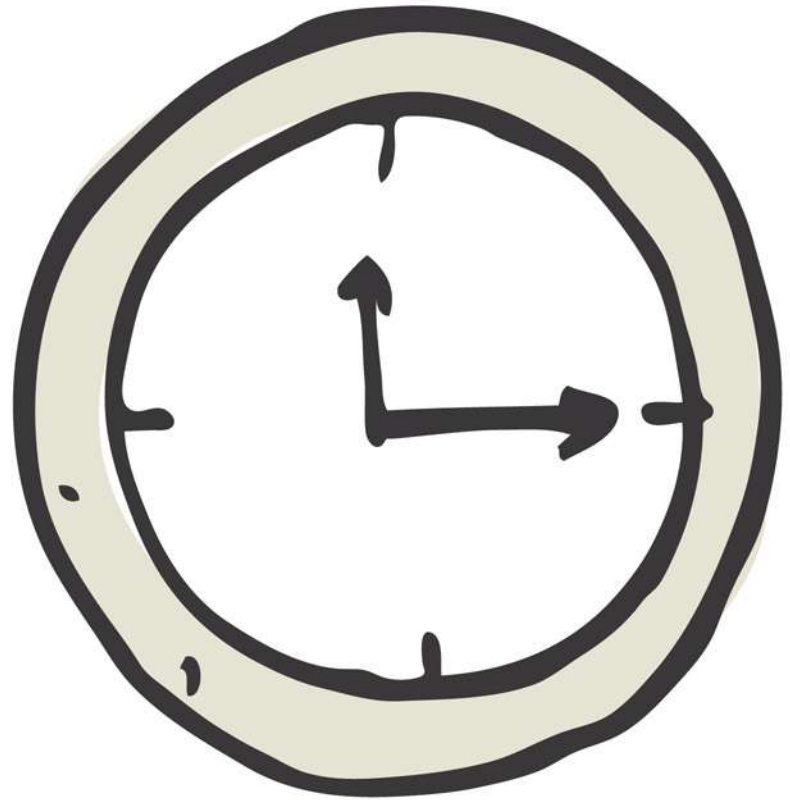
We're seeing this across categories....



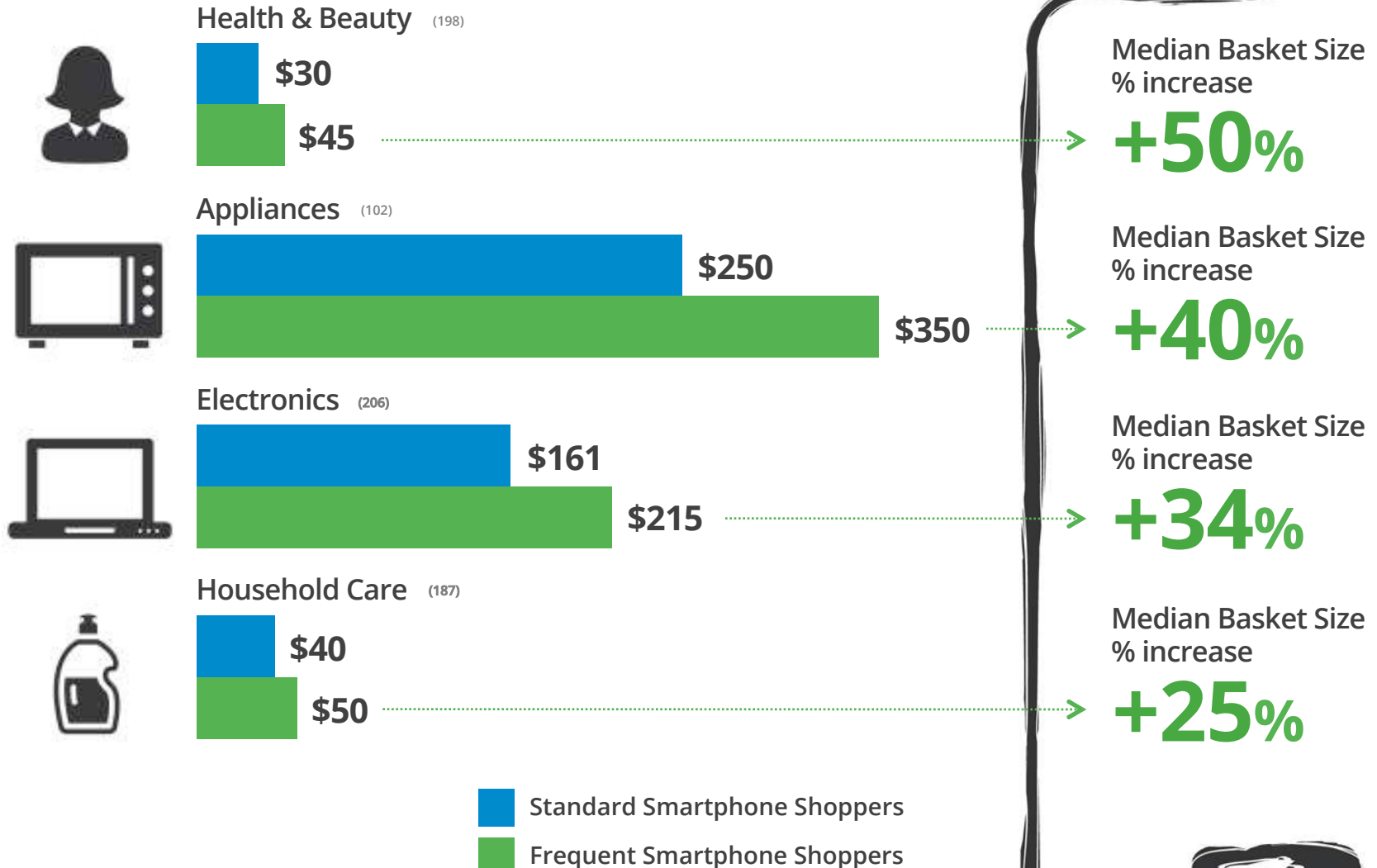
In-store smartphone use for any shopping activity

Almost half
use mobile for

15+
minutes
per store visit



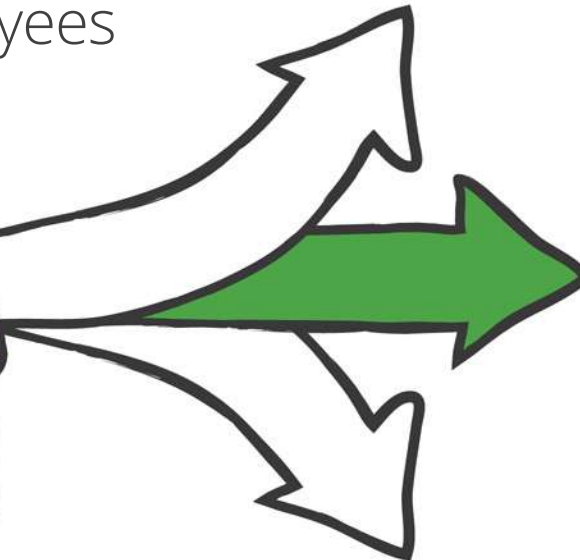
Shoppers who use mobile more, **buy more**



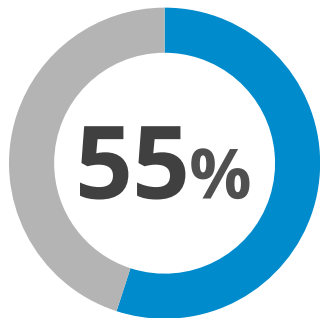
“Self-help” is becoming the new norm

1 in 3

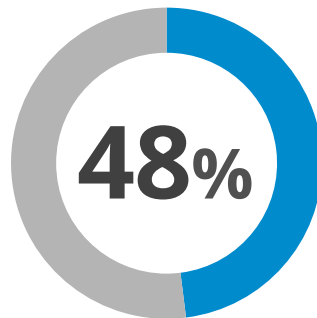
shoppers use their smartphones to find information instead of asking store employees



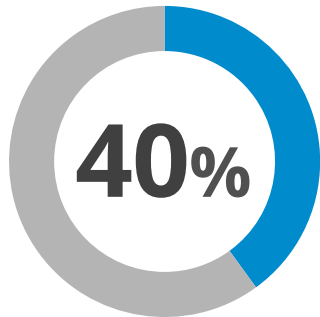
In some categories this “self-help” trend dramatically increases



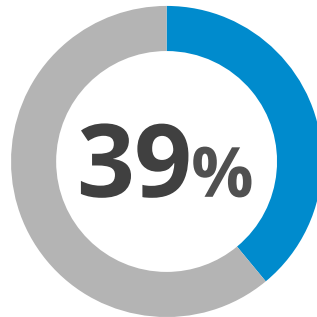
Appliances
(102)



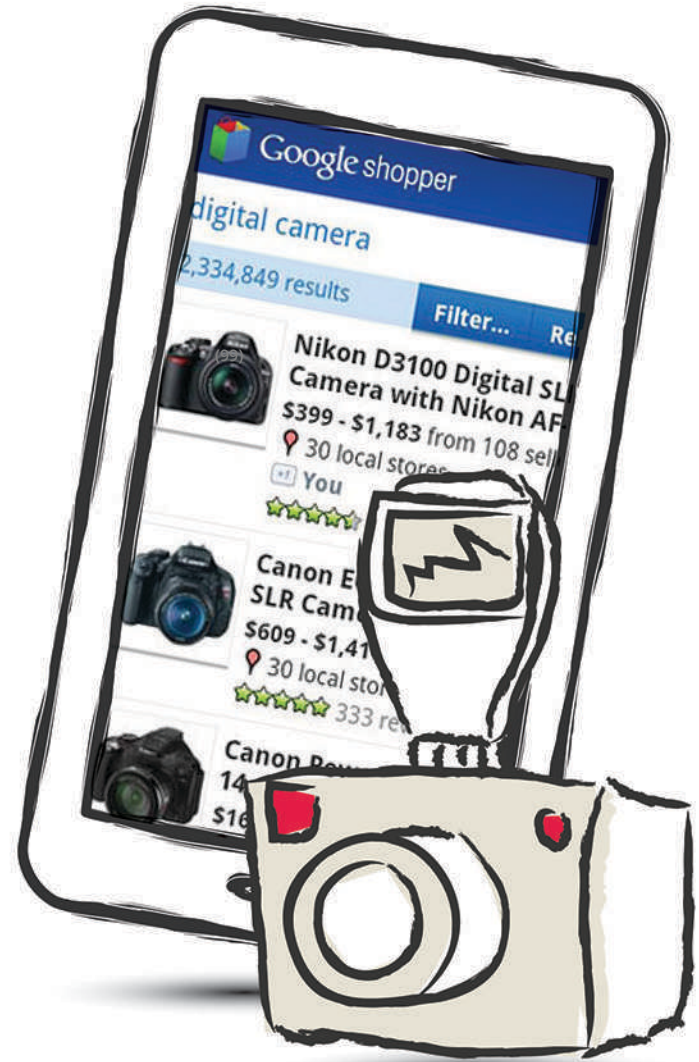
Electronics
(203)



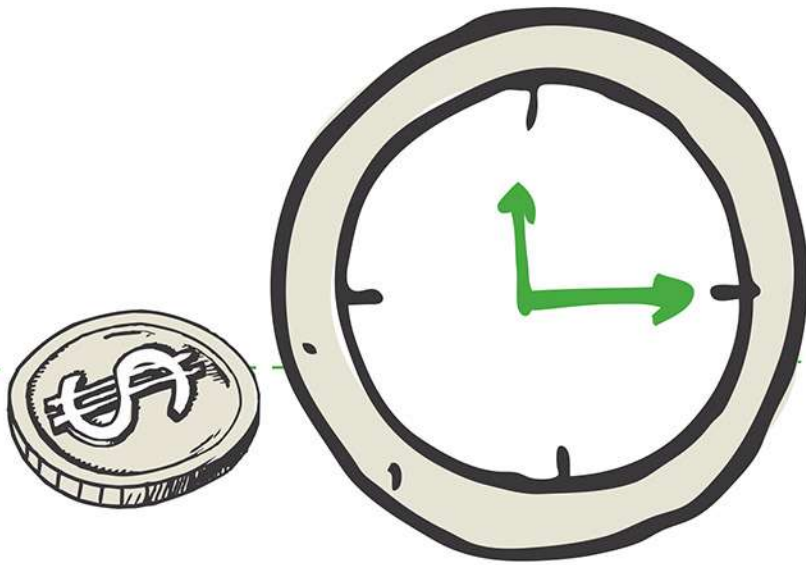
Baby Care
(135)



Household Care
(185)

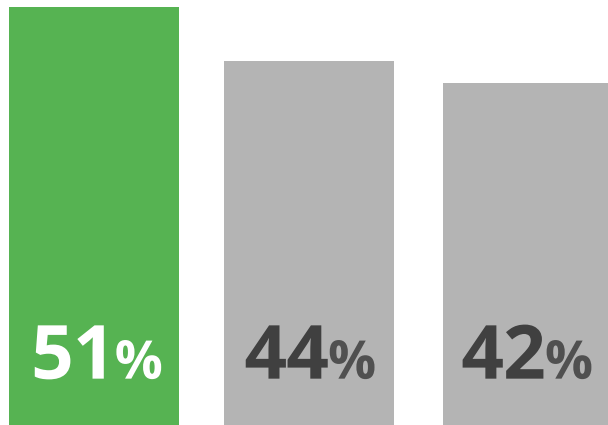


Mobile empowers
shoppers



Convenience and savings are leading drivers of mobile use

Benefit of using mobile phone for shopping



Saves me Time

Saves me Money

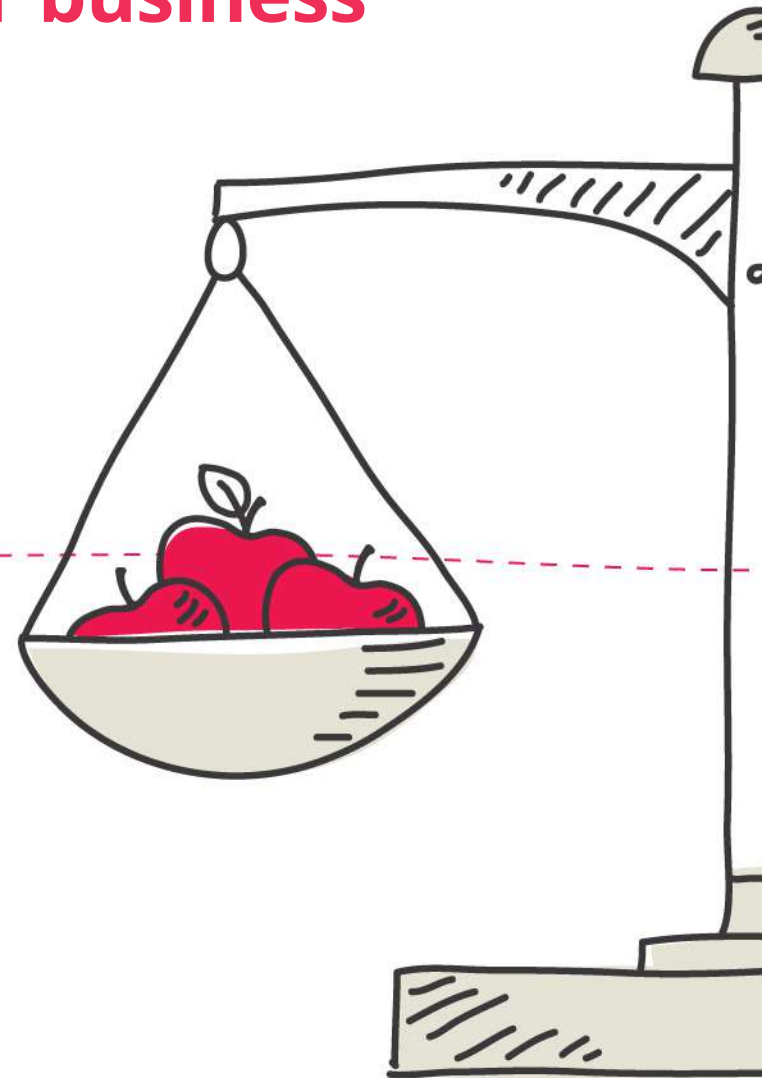
Makes Life Easier



Cost savings are important to in-store consumers and so is **finding your business**

53% 

Make price comparisons



39%

Find promotional offers



36%

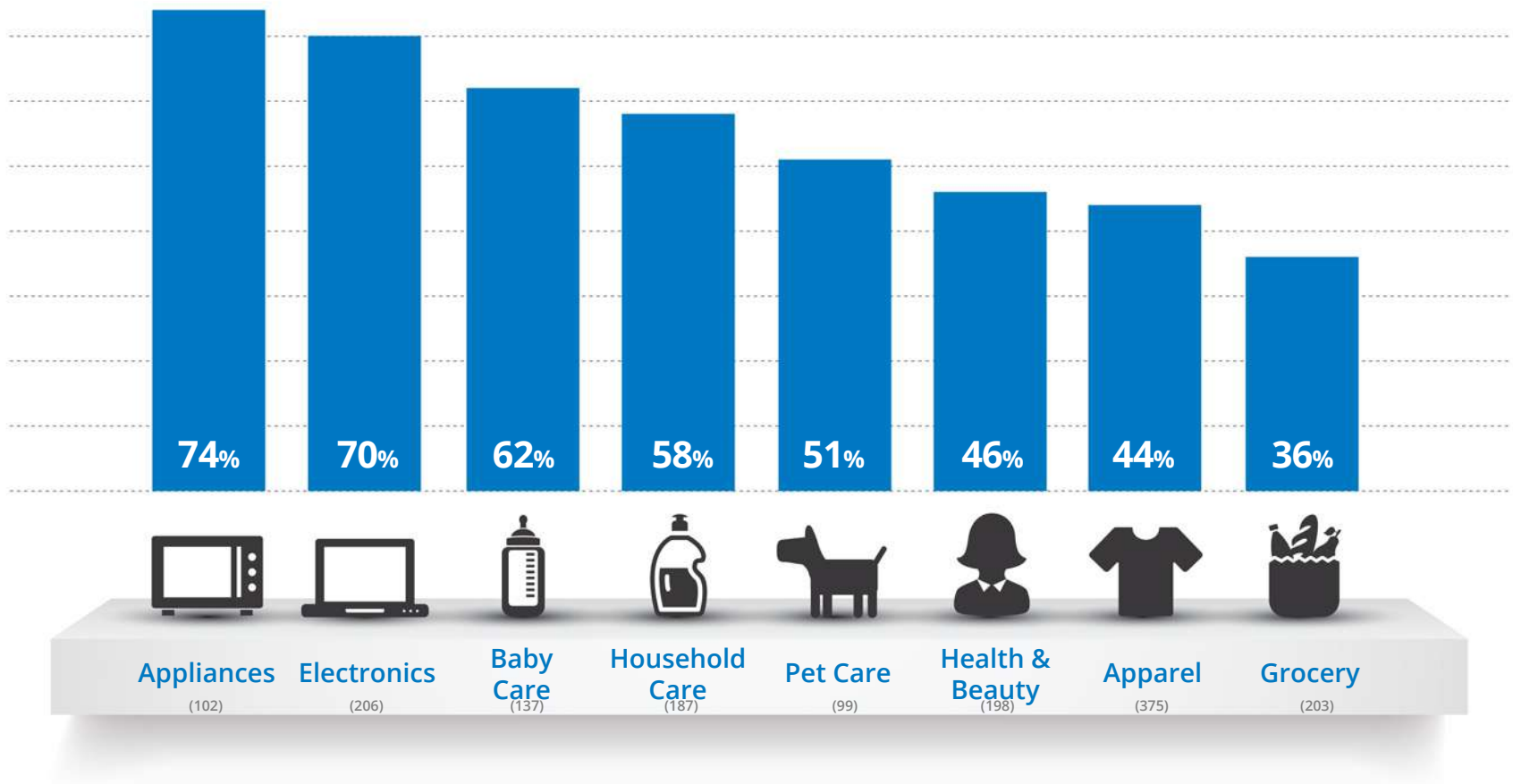
Find location / directions



35%

Find hours

In-store price comparisons are the most common shopping activity across all categories



In-store smartphone use for mobile price comparisons

Shoppers **rely on search**
for product information

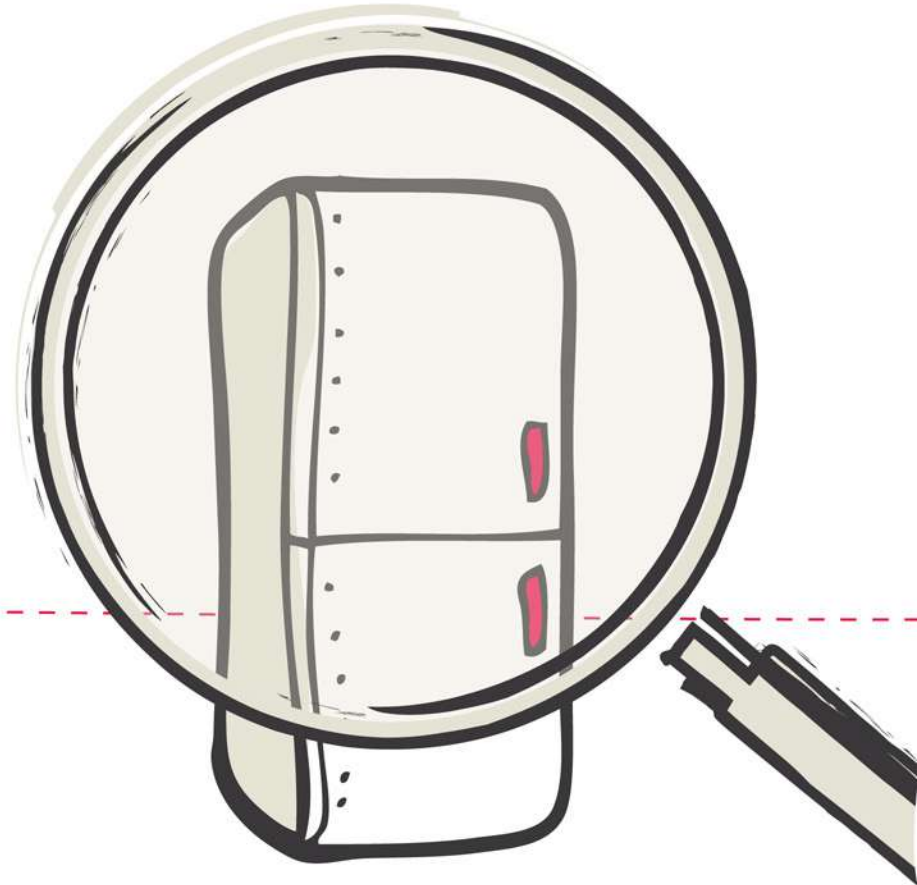


82%

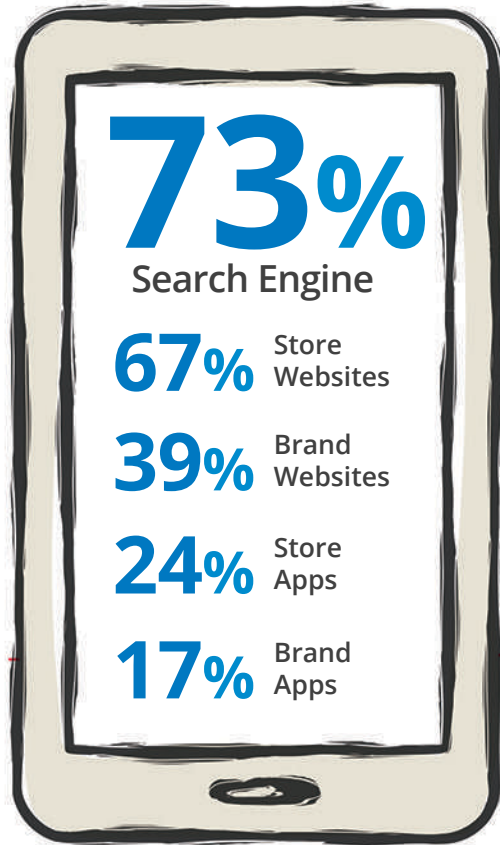
of shoppers use search engines when browsing product info in-store



Consumers choose search as their #1 in-store resource to help **research products**

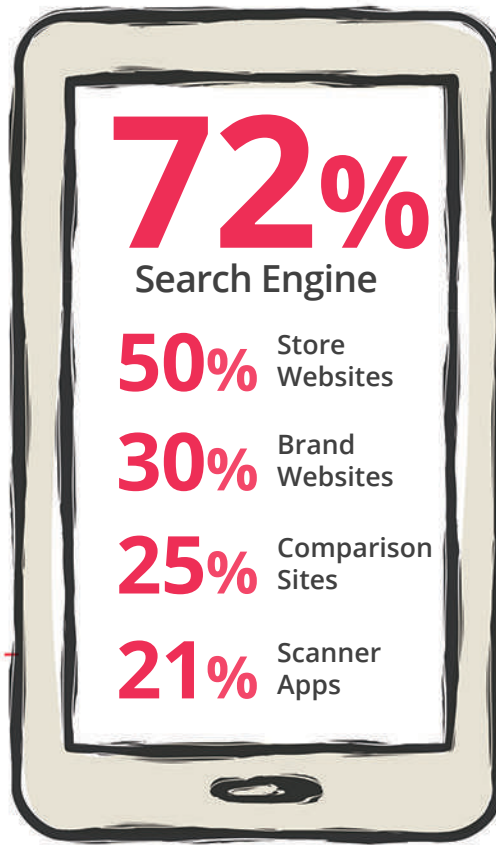


Consumers choose search as their #1 in-store resource



Find where products are sold

(374)



Make price comparisons

(794)



Find promotional offers

(654)

Mobile sites are preferred over apps by in-store shoppers

65%

Prefer
Mobile
Sites



35%

Prefer Apps

Implications for businesses

1 Mobile marketing isn't an option; **it's an imperative**

2 Mobile can be used to get customers to the store and can help **keep them there**

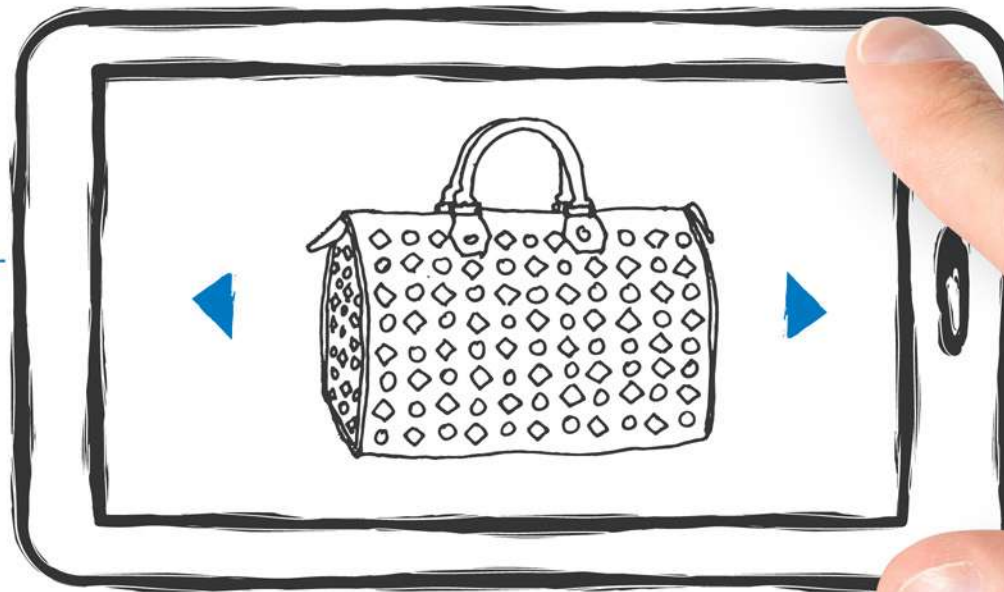
3 Meet the **showrooming** challenge head-on

4 **Recognize the pivotal role of mobile** to your overall marketing strategy



Mobile marketing isn't an option; **it's an imperative**

In-store shoppers are looking for product information and they're turning to their mobile device to find it. The mobile device, always on and always with shoppers, is one of the biggest influencers in the store today; it presents tremendous opportunities for marketers across industries to connect with potential customers--wherever they are, whenever they're searching for your products.



Mobile can be used to get **customers to the store** and can help keep them there

Allow customers to find your business on mobile.

In addition to having a mobile website, businesses should use it to prominently display retail locations and phone numbers.

Own the digital shelf.

Make it easy for shoppers to find product information, promotional offers, or other information about your business on their smartphones when in-store.

Adapt your marketing message to the consumer's context.

Taking into account things like location, time of day and device allow you to reach people with more relevant messages.



Meet the **showrooming** challenge head-on

Embrace mobile use in-store.

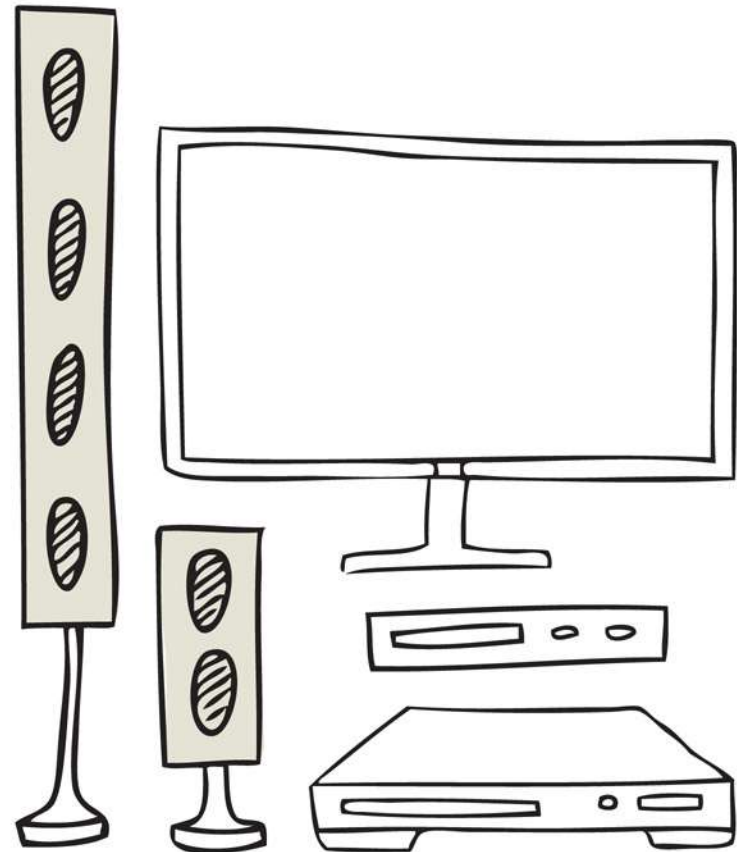
It's going to happen, so find a way to take advantage of it. Having a wide inventory of ecommerce products, store maps, and product information QR codes are just some of the ways to connect with mobile users.

Improve the in-store experience.

Offering expert service from salespeople or interactive product demos can help distinguish your in-store experience from online shopping.

Have a strategy to address price comparisons.

Using price match guarantees, stocking unique product bundles, and creating store specific brands and products are just some of the steps that businesses can take.



Recognize the pivotal role of mobile

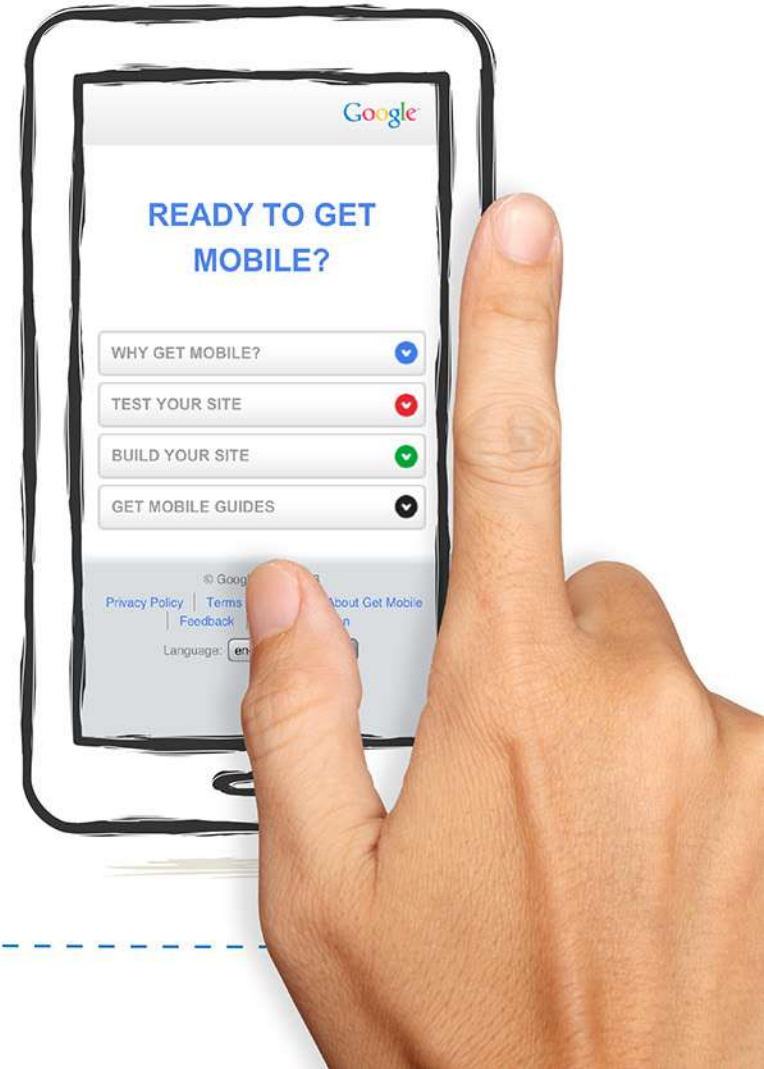
to your overall marketing strategy

Own the shelf by allowing consumers to research and purchase your products with a mobile device.

Shoppers often need more information to make a purchase decision and mobile search is their gateway.

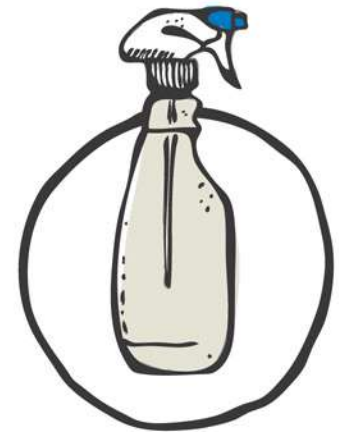
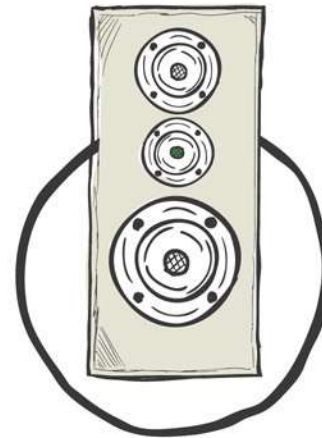
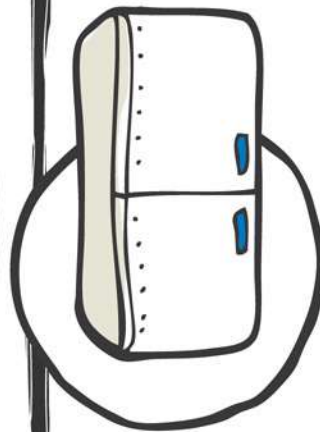
Start to measure new conversion types.

Today's devices offer more ways than ever for customers to interact with your business. Customers that initially find you on mobile can transact on a web site or app, purchase over the phone, or visit your physical store. Develop strategies to accurately attribute these actions to your mobile marketing.





Shoppers use mobile devices across all product categories



Shoppers use mobile phones in-store when shopping for **apparel**

43%



Make price comparisons

43%



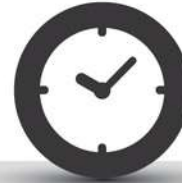
Find promo offers

34%

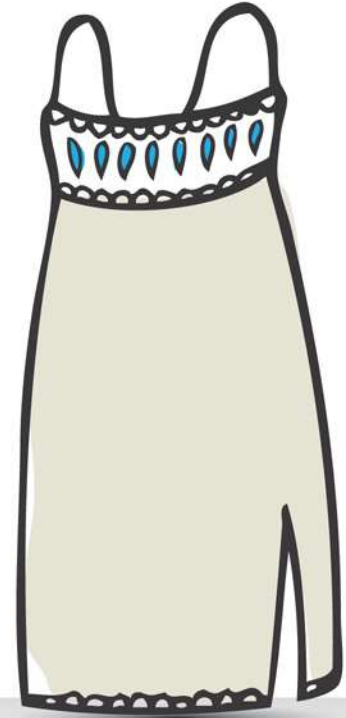
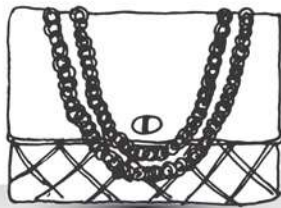


Find location / directions

34%



Find hours



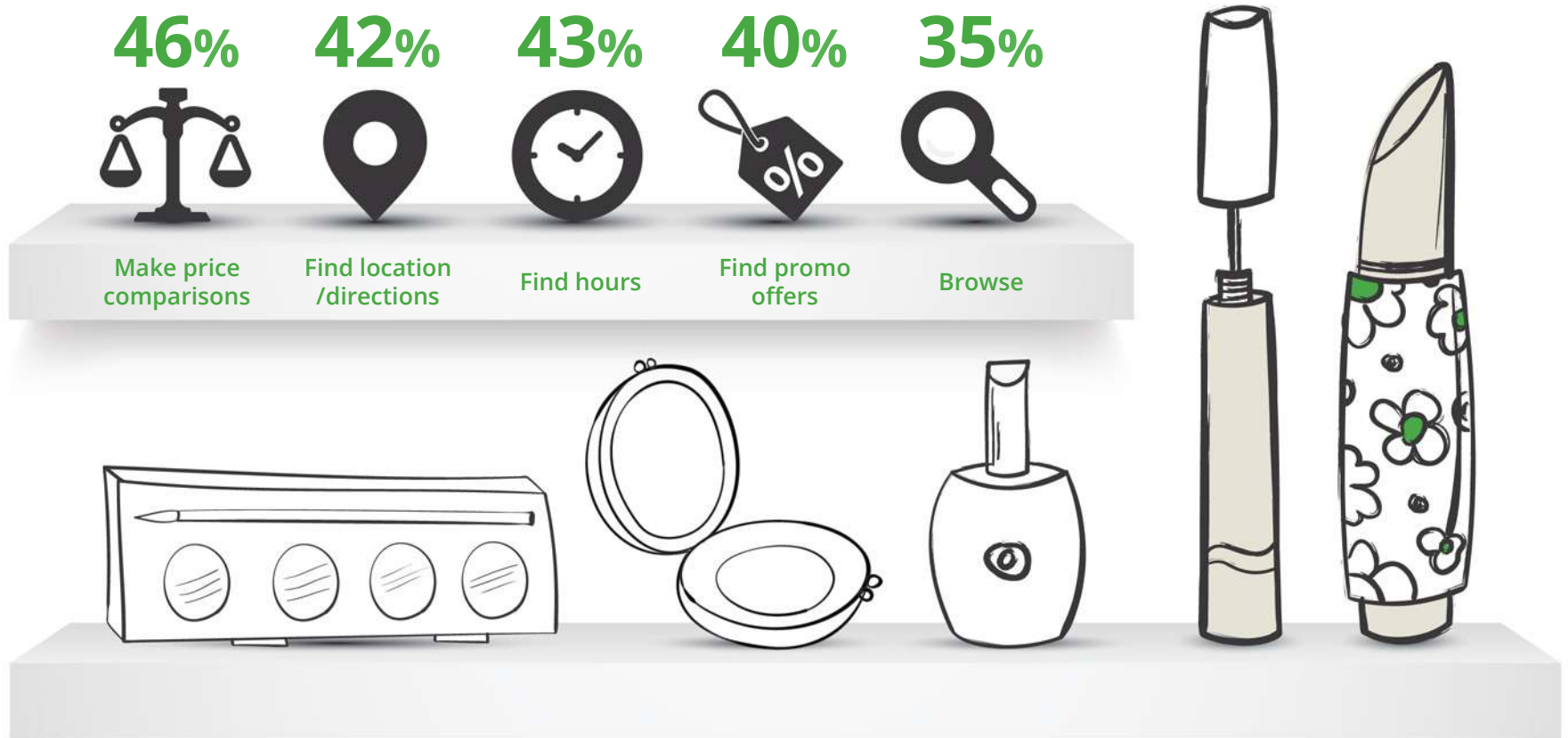
Shoppers use mobile phones in-store when shopping for **electronics**



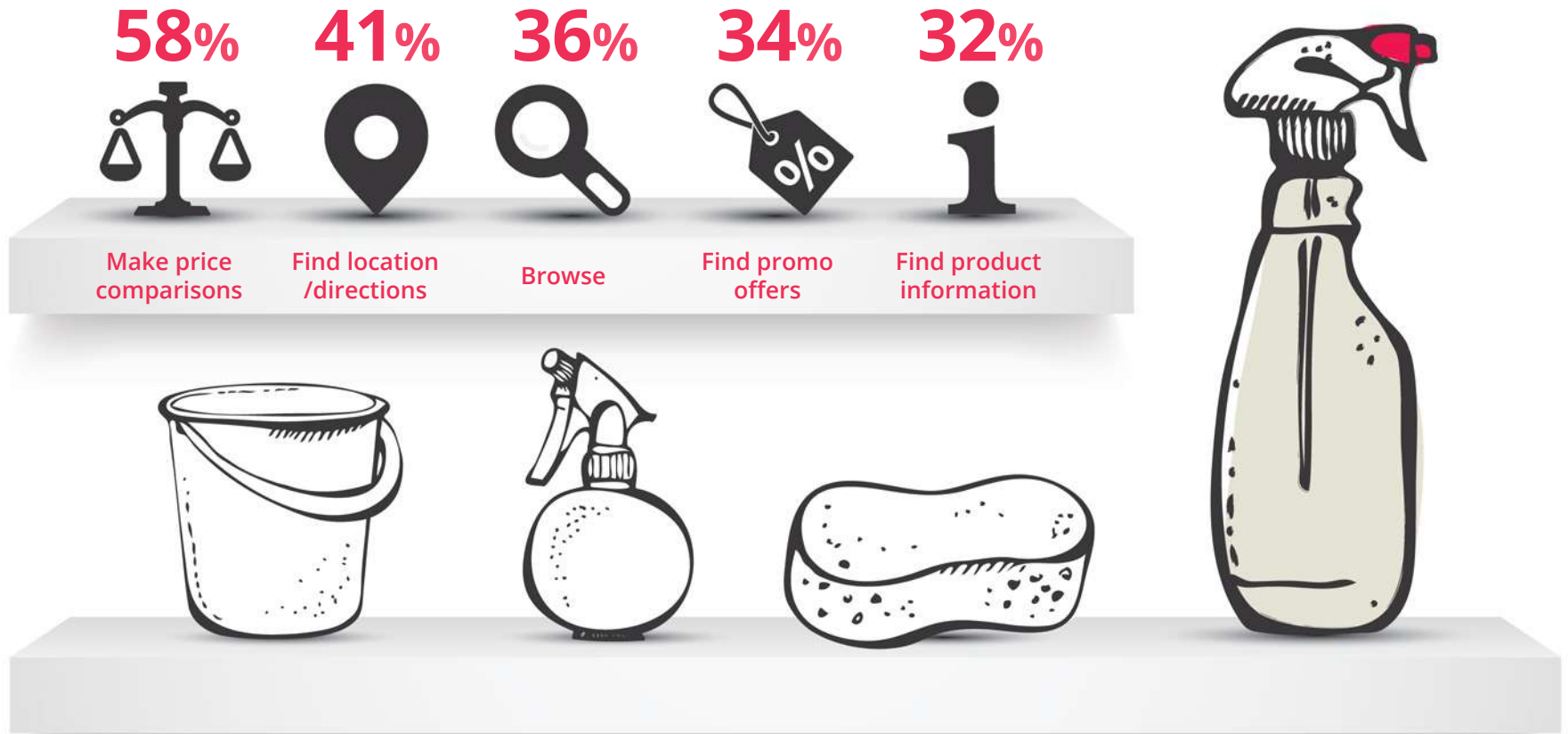
Shoppers use mobile phones in-store when shopping for **appliances**



Shoppers use mobile phones in-store when shopping for **health & beauty**

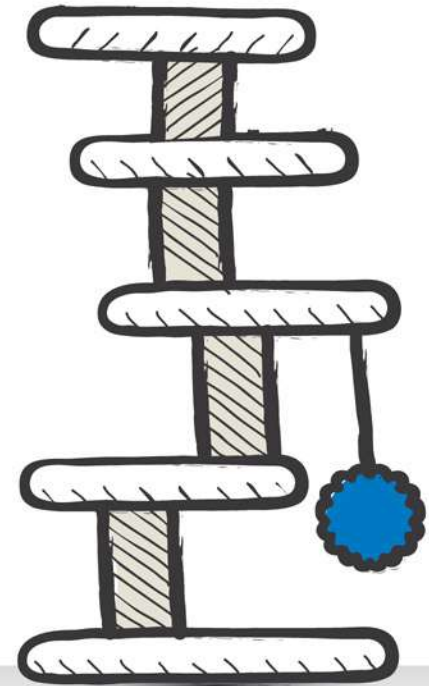


Shoppers use mobile phones in-store when shopping for **household care**

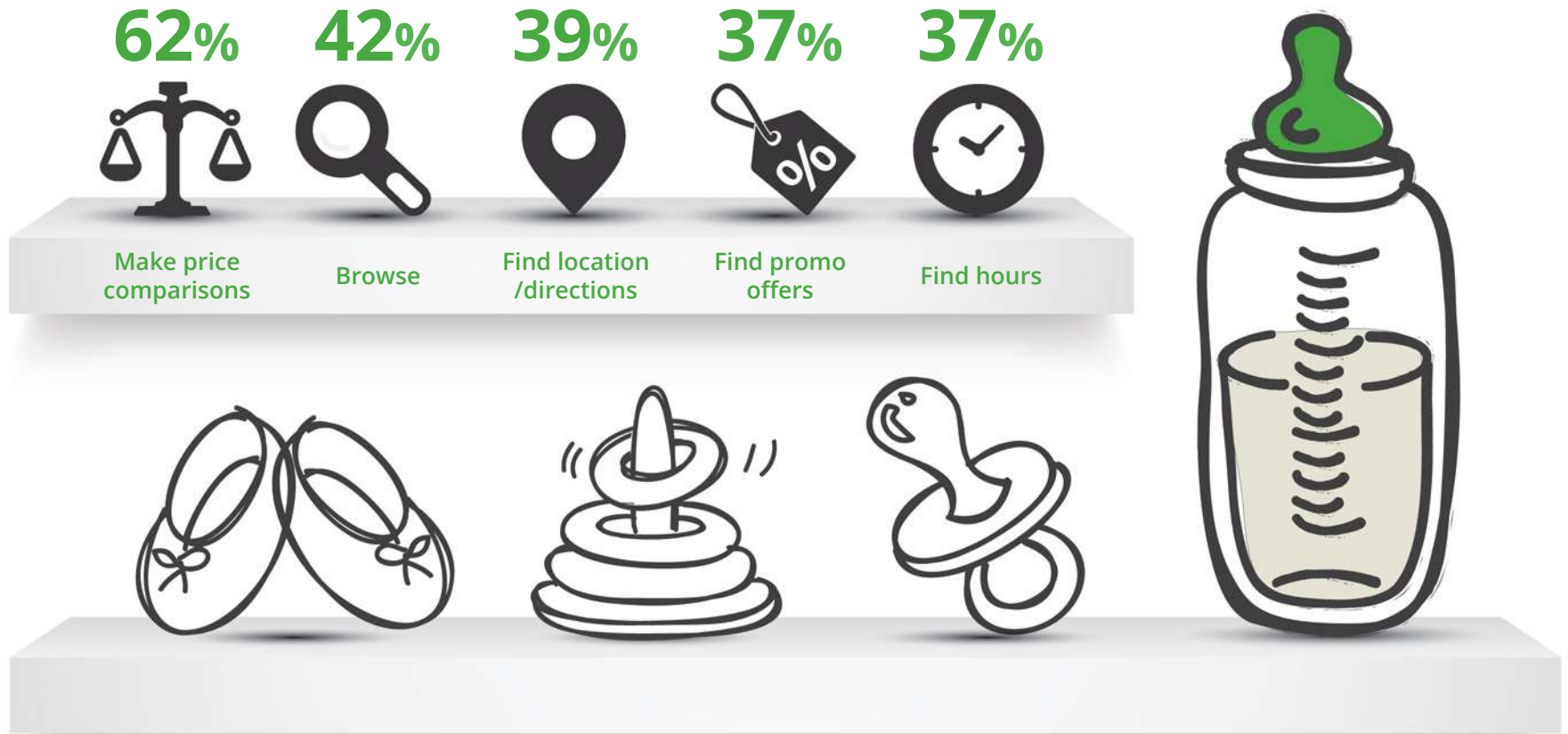


Shoppers use mobile phones in-store when shopping for **pet products**

58%
Make price
comparisons



Shoppers use mobile phones in-store when shopping for **baby products**



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How in-store shoppers are using mobile devices



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Marketing Council

