Mobile & Purchase Journey

SPAIN

Why did we do it?

Travel	Local & Entertain	Technology	Retail

Smartphones have become **multifunctional tools, being accessed anytime and anywhere.** People use their smartphone to make phone calls, to keep notes, to message... But what about **smartphone and shopping?**

Mobile & Purchase Journey helps quantifying the **role of smartphone in the research and purchase process.** The tool includes data for **37 countries** across **4 verticals**: travel, technology, retail and local & entertainment.

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What did we do?

We asked …

1.000 smartphone users + 1.000 non smartphone users

in 37 countries

about their research- and purchase behaviour

for 4 different verticals

prior to their last purchase

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How did we do it?

Travel Local & Entertain Technology Retail
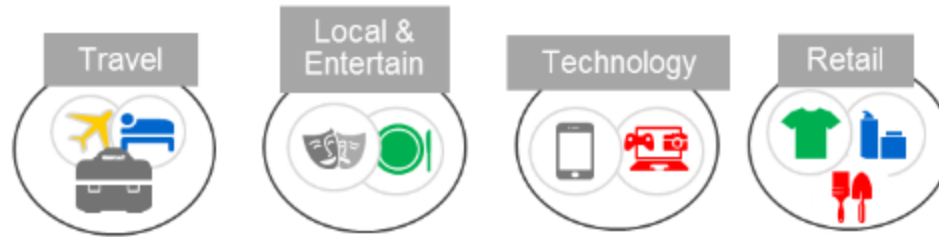
We identified **product purchasers** in the **past 12 months** for the relevant verticals and asked about their **path to purchase** in their **most recent product purchase**

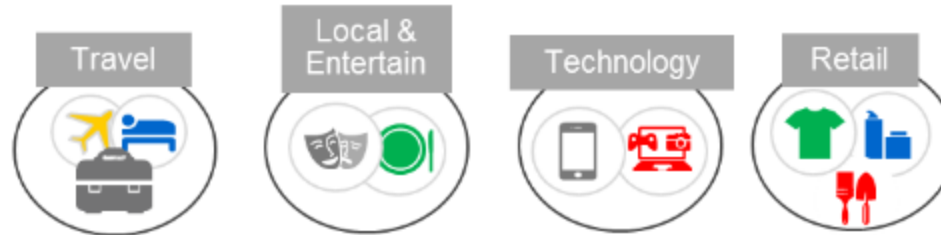We analysed a minimum number of

300

Interviews per vertical

X Smartphone users

X Non-Smartphone users

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Content

Travel • Local & Entertain • Technology • Retail

1) Who did we talk to?
Socio-demographic profile of smartphone and non smartphone owners

2) Who are the smartphoners?
Information about the smartphoners devices at a country level

3) How is smartphone used for shopping in general?
Information about how smartphoners use their device for general research prior to purchase at a country level

4) How do they shop for the different verticals?
ROPO process for smartphoners and non smartphoners at the vertical level

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Global key findings

These are the main and most relevant <u>global</u> findings – they should be a guide for you when diving through the local, regional or vertical results and help you putting the results into context and select the most important findings for your own presentations.

Regardless of the the smartphone country's penetration, it has become an **important tool for those who use it** in the **consumer journey**, and is **used on top of other devices** for researching and purchasing products.
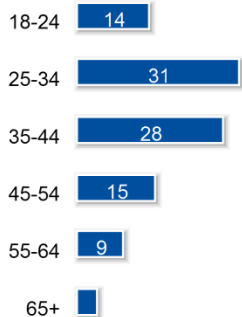
Smartphone's importance in the path to purchase is **more relevant in countries with no "desktop heritage"** and/or **having a high "digital adoption rate"**. Nevertheless, the smartphone **starts to cannibalize desktop usage in all countries**.

Smartphone research happens for all products, specifically in those which are **digitally mature** like travel and tech. **Depending on the product**, the smartphone will be used **different stages of the purchase journey**
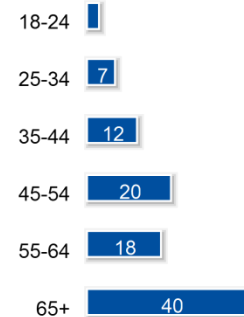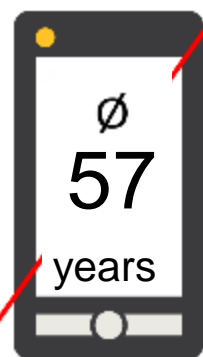
It's the context which drives online usage and not the device. Across all vertical, smartphone and non smartphone owners seek for the **same type of information** on their different devices

We surveyed smartphoners and non-smartphoners

Smartphone users

Non-smartphone users

	Smartphone users		Non-smartphone users
Ø **37** years	18-24: 14	%	Ø **57** years	18-24: (small)
	25-34: 31		25-34: 7
	35-44: 28		35-44: 12
	45-54: 15		45-54: 20
	55-64: 9		55-64: 18
	65+: (small)		65+: 40

49 % / 51 %

54 % / 46 %

male
female

Education

Middle/low: 66

High: 34

Middle/low: 82

High: 18

Filter: Country = Spain

%

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Q1: Age, gender and education
Base: Local population 18+

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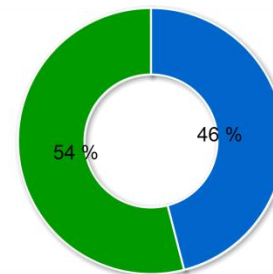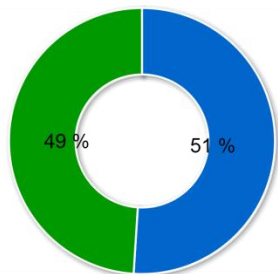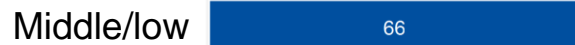
How many are smartphoners?

Current smartphone usage

55%

use a smartphone
and use on average

4

internet enabled
devices

Filter: Country = Spain

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Q12: Do you currently use a smartphone?
Base: Local population 18+
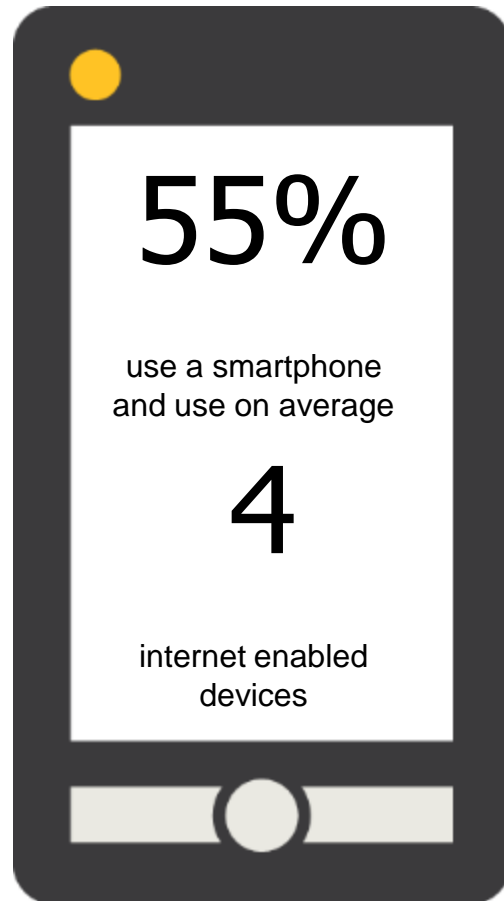
How many use search engines on their different devices for general online search?

Smartphone users

Search engine used on a smartphone

Search engine used on a desktop/tablet

Non-smartphone users

Search engine used on a desktop/tablet

		Smartphone users								Non-smartphone users				
	91 %	94 %	91 %	94 %	91 %	94 %	91 %	94 %	91 %	94 %	84 %	84 %	84 %	84 %	84 %

Total — All Verticals	Travel	Local & Entertain	Technology	Retail	Total — All Verticals	Travel	Local & Entertain	Technology	Retail

Filter: Country = Spain

QIA 1_1-_4: How often do you - through your web browser or apps - use search engines per device category?
Base: Local onliners 18+ who are (non-) smartphone users

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9
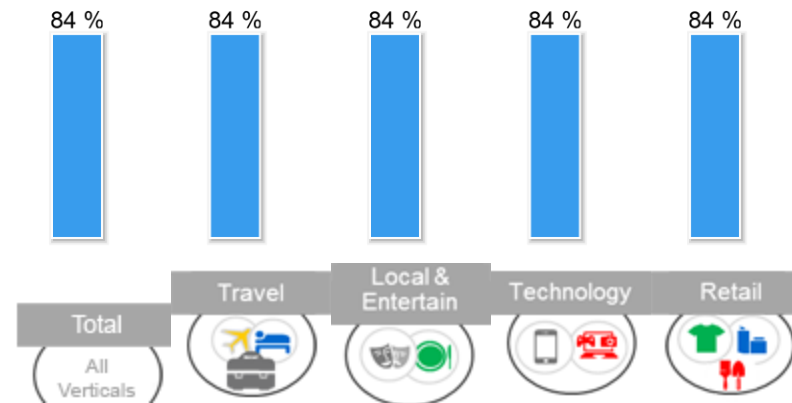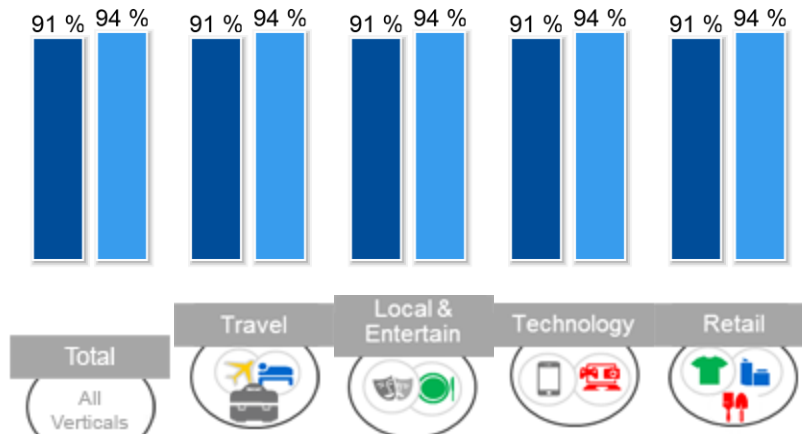
How is smartphone used for shopping in general?

58%

Filter: Country = Spain

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How is smartphone used for shopping in general?

Home — 50
In a store
Public transport — 19
On the go — 19

%

Source: OMP, IPSOS, Q1/2013

X-axis labels: In bed morning | Morning | Morning commute | Late morning | Lunch | Early afternoon | Late afternoon | Early evening | Evening commute | Dinner | Late evening | In bed evening
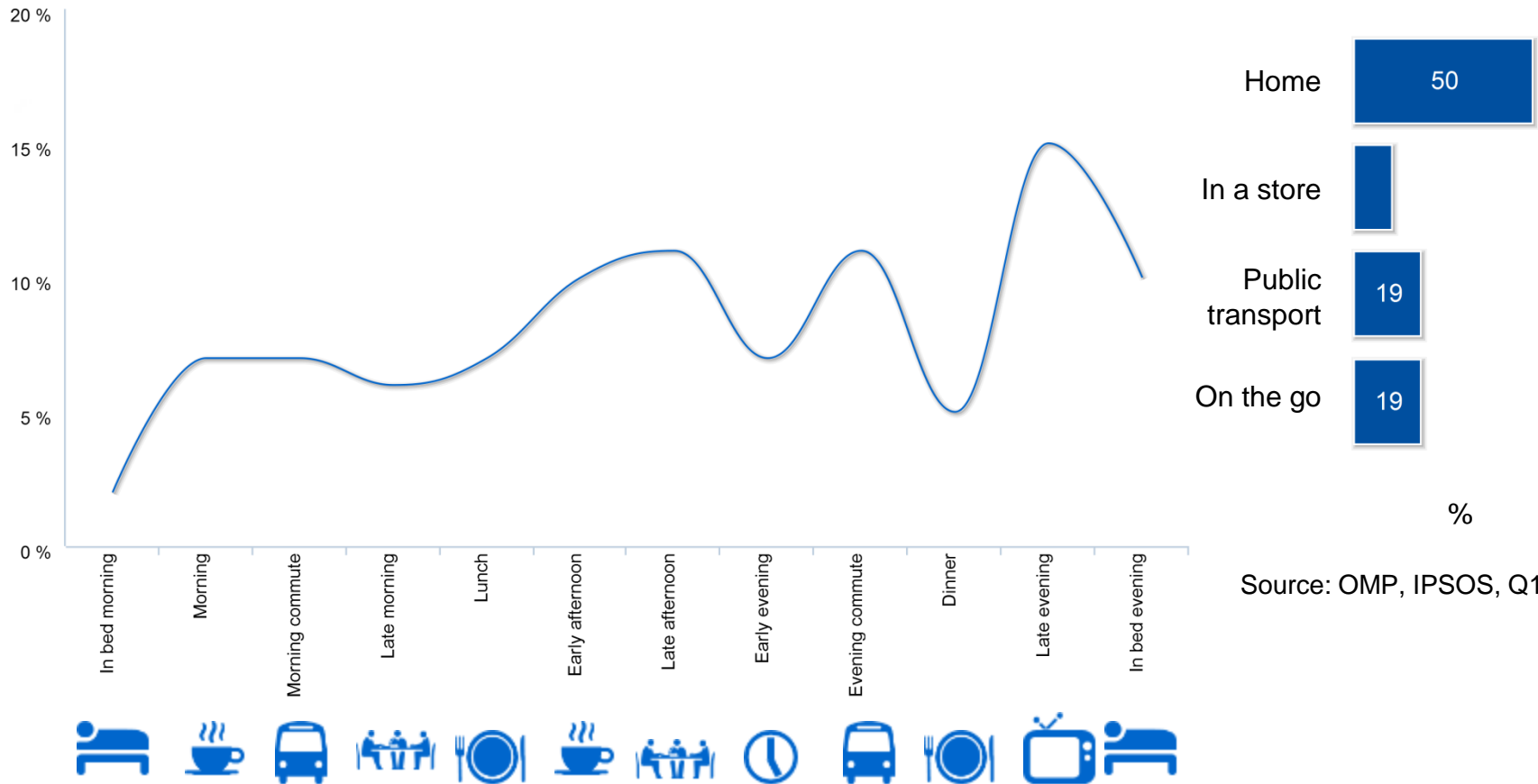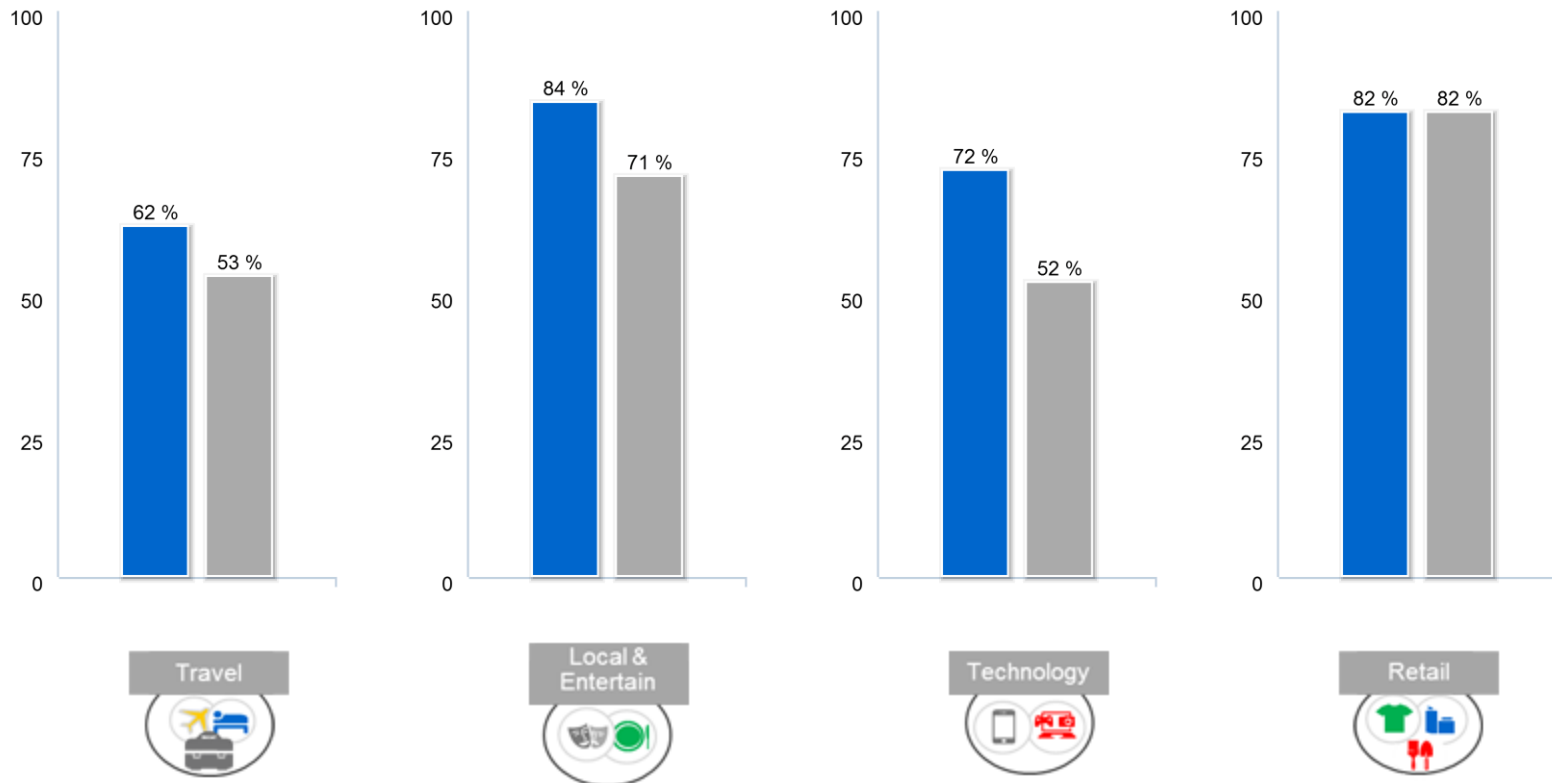
Filter: Test group = Smartphone users - Country = Spain

Q26: When do you usually shop or search for shopping information on your smartphone?
Base: Purchasers in the last 12 months who use a smartphone

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How many purchased in the last 12 months the specific products?

Smartphoners
Non-Smartphoners

Travel: Smartphoners 62 %, Non-Smartphoners 53 %

Local & Entertain: Smartphoners 84 %, Non-Smartphoners 71 %

Technology: Smartphoners 72 %, Non-Smartphoners 52 %

Retail: Smartphoners 82 %, Non-Smartphoners 82 %

Filter: Country = Spain

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Q10: When did you last [book/buy product]?
Base: Local smartphoners and non-smartphoners

Impulse or planned purchases? When did they start researching for the product?

Total
All Verticals

- Smartphone users   - Non-smartphone users

Chart categories (x-axis):
- More than a year before
- 7-12 months before
- 4-6 months before
- 2-3 months before
- A month before
- A week before
- Within the day of my purchase
- Within the hour of my purchase
- A few moments before

Travel

Local & Entertain

Technology
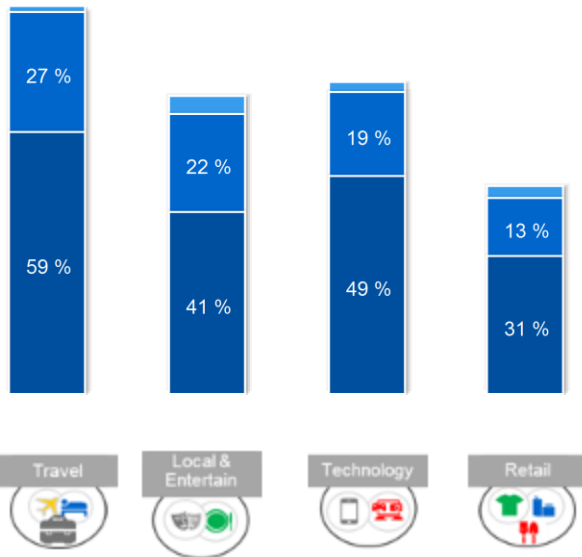
Retail

Filter: Country = Spain

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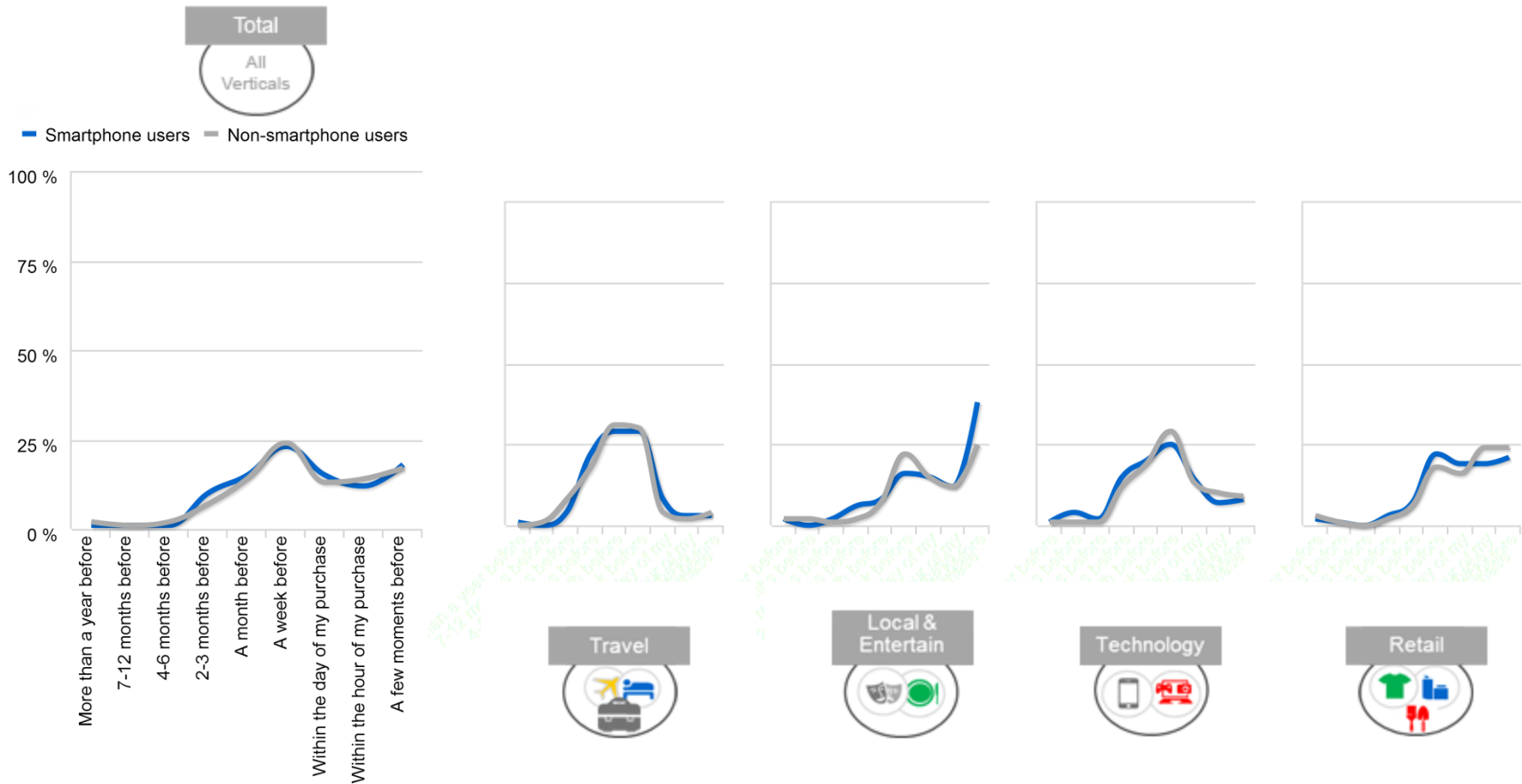
Q12: In TOTAL, when did you start informing yourself before you actually…?
Base: Product purchasers in the last 12 months

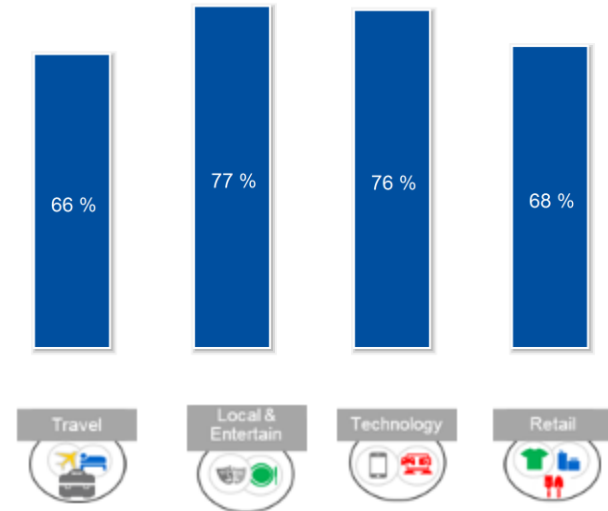# Smartphoners - Online vs. Offline: where do they research?

Smartphone only

Smartphone & desktop/ tablet

Desktop/ tablet only

Online research

Travel	Local & Entertain	Technology	Retail
27 %	22 %	19 %	13 %
59 %	41 %	49 %	31 %

Offline personal WOM

Travel	Local & Entertain	Technology	Retail
66 %	77 %	76 %	68 %

Filter: Country = Spain

Q13-Q15, Q17: Touchpoints used in the research phase
Base: Purchasers in the last 12 months

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Non-Smartphoners - Online vs. Offline: where do they research?

Online research

Offline personal WOM

Filter: Country = Spain

Q13-Q15, Q17: Touchpoints used in the research phase
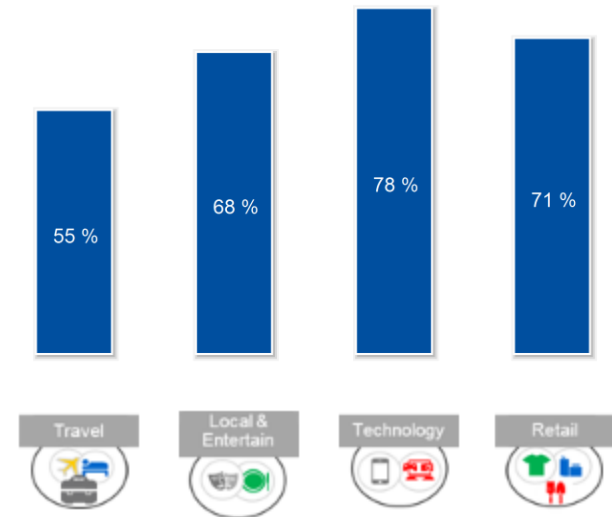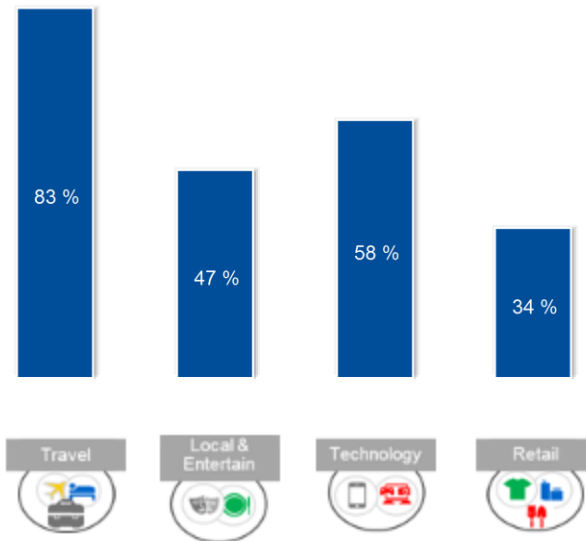Base: Purchasers in the last 12 months

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How many smartphoners researched the product on their device?

28% Travel

26% Local & Entertain

21% Technology

16% Retail

Filter: Country = Spain

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How many smartphone researchers used search engines on their device?

No	Yes
46 / 54 — Travel

No	Yes
41 / 59 — Local & Entertain

No	Yes
48 / 52 — Technology

No	Yes
43 / 57 — Retail

Filter: Country = Spain

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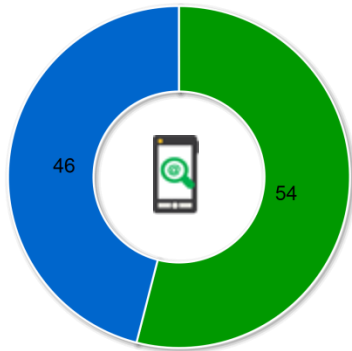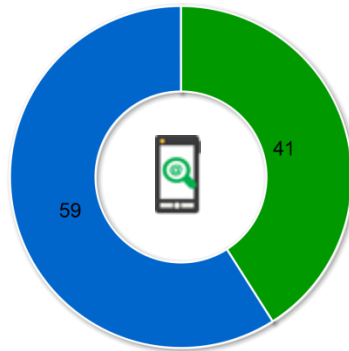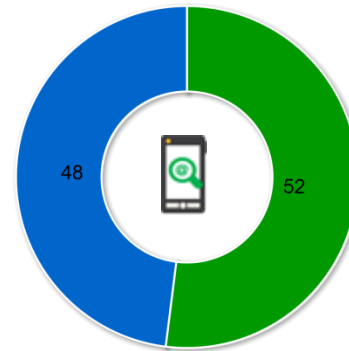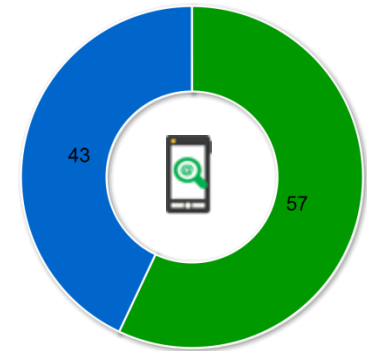
We covered pre-purchase research touch points and assigned them to path-to-purchase related groups

Stimulus

ZMOT

First Moment of Truth

First inspiration or advertising

Pre-purchase touchpoints a consumer seeks out after hearing for the first time about a product / service

First interaction between a shopper and a product / service

For more information please visit www.zeromomentoftruth.com

What sources of information are used when researching?
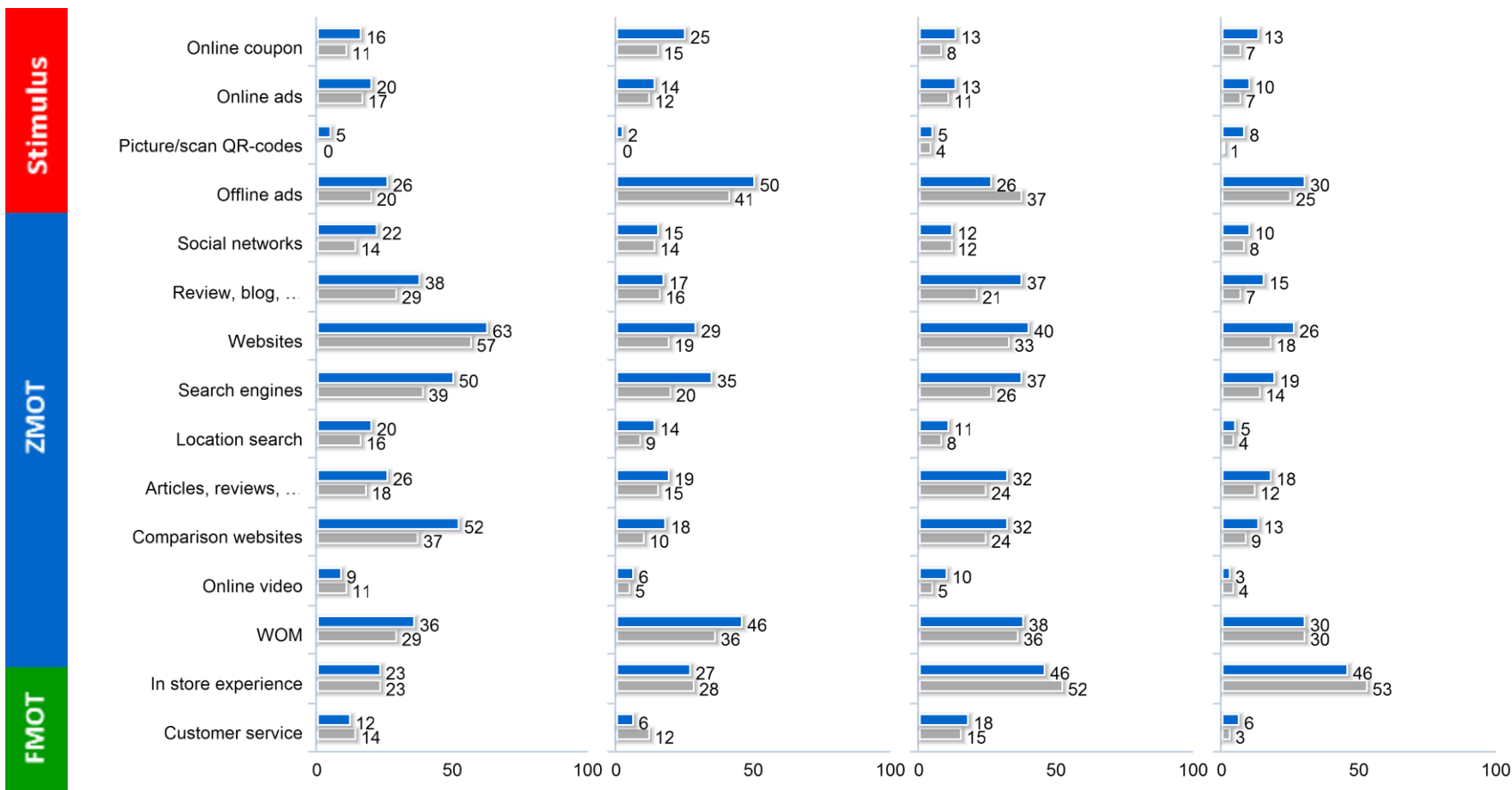
Smartphone users

Non-smartphone users

	Travel	Local & Entertain	Technology	Retail
Stimulus				
Online coupon	16 / 11	25 / 15	13 / 8	13 / 7
Online ads	20 / 17	14 / 12	13 / 11	10 / 7
Picture/scan QR-codes	5 / 0	2 / 0	5 / 4	8 / 1
Offline ads	26 / 20	50 / 41	26 / 37	30 / 25
ZMOT				
Social networks	22 / 14	15 / 14	12 / 12	10 / 8
Review, blog, ...	38 / 29	17 / 16	37 / 21	15 / 7
Websites	63 / 57	29 / 19	40 / 33	26 / 18
Search engines	50 / 39	35 / 20	37 / 26	19 / 14
Location search	20 / 16	14 / 9	11 / 8	5 / 4
Articles, reviews, ...	26 / 18	19 / 15	32 / 24	18 / 12
Comparison websites	52 / 37	18 / 10	32 / 24	13 / 9
Online video	9 / 11	6 / 5	10 / 5	3 / 4
WOM	36 / 29	46 / 36	38 / 36	30 / 30
FMOT				
In store experience	23 / 23	27 / 28	46 / 52	46 / 53
Customer service	12 / 14	6 / 12	18 / 15	6 / 3

Filter: Country = Spain

%

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What about smartphoners? On which device do they research online?

- **Smartphone** - **Desktop/ tablet**

| Travel | Local & Entertain | Technology | Retail |

Stimulus / ZMOT

- Online coupon
- Online ads
- Social networks
- Review, blog, ..
- Websites
- Search engines
- Location search
- Articles, reviews, ...
- Comparison websites
- Online video

0   50   100   0   50   100   0   50   100   0   50   100   %

Filter: Country = Spain

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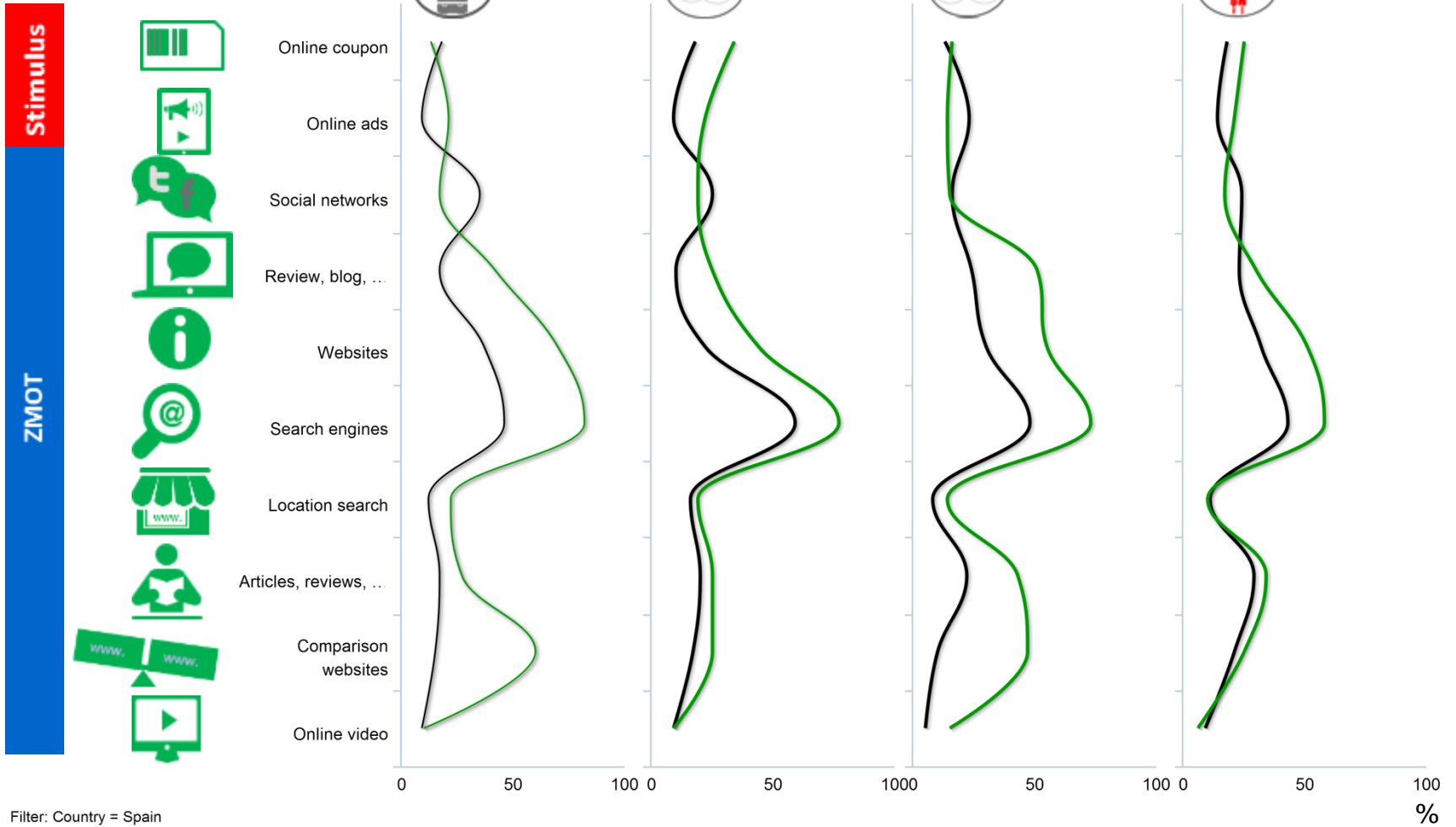
What are the most influential sources of information on a smartphone?

Ranking of mobile touch points

	1	**2**	**3**	**4**	**5**	**6**	**7**
Travel	Websites	Social networks	Search engines	Review, blog, …	Online coupon	Articles, reviews, …	Online video
Local & Entertain	Search engines	Social networks	Online coupon	Comparison websites	Websites	Retrieve coupon	Articles, reviews, …
Technology	Review, blog, …	Websites	Search engines	Social networks	Online ads	Picture/scan QR-codes	Online coupon
Retail	Social networks	Articles, reviews, …	Search engines	Online coupon	Websites	Review, blog, …	Picture/scan QR-codes

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At which stage of the research process do smartphoners use their device?
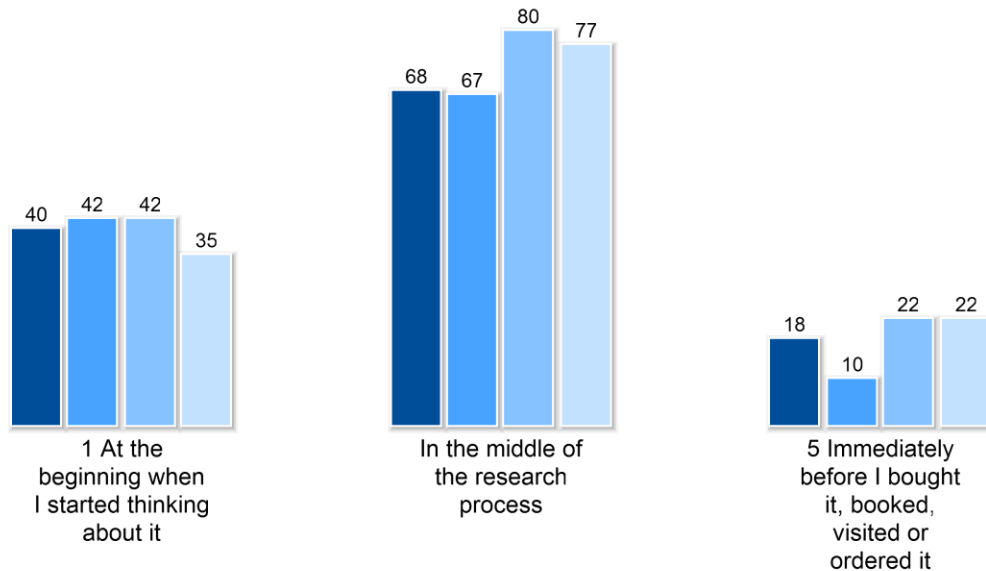
Smartphone Research

Travel	28%
Local & Entertain	26%
Technology	21%
Retail	16%

Legend: ■ Travel ■ Local & Entertain ■ Technology ■ Retail

Chart values:

1 At the beginning when I started thinking about it
- 40, 42, 42, 35

In the middle of the research process
- 68, 67, 80, 77

5 Immediately before I bought it, booked, visited or ordered it
- 18, 10, 22, 22

%

Filter: Country = Spain

Q18: When did you use the information sources listed below? Some might be more often used at the beginning of the information phase, some more often in-between the phase of collecting information and others shortly before the final decision. 5-point-scale
Base: Product purchasers in the last 12 months who use a smartphone and who performed mobile search at least for one product for their last purchase

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Apps vs. mobile browser? Which one is used most?

**Product research on
smartphone - via apps**

**Product research on
smartphone - via browser**

Travel	48%
Local & Entertain	39%
Technology	51%
Retail	53%

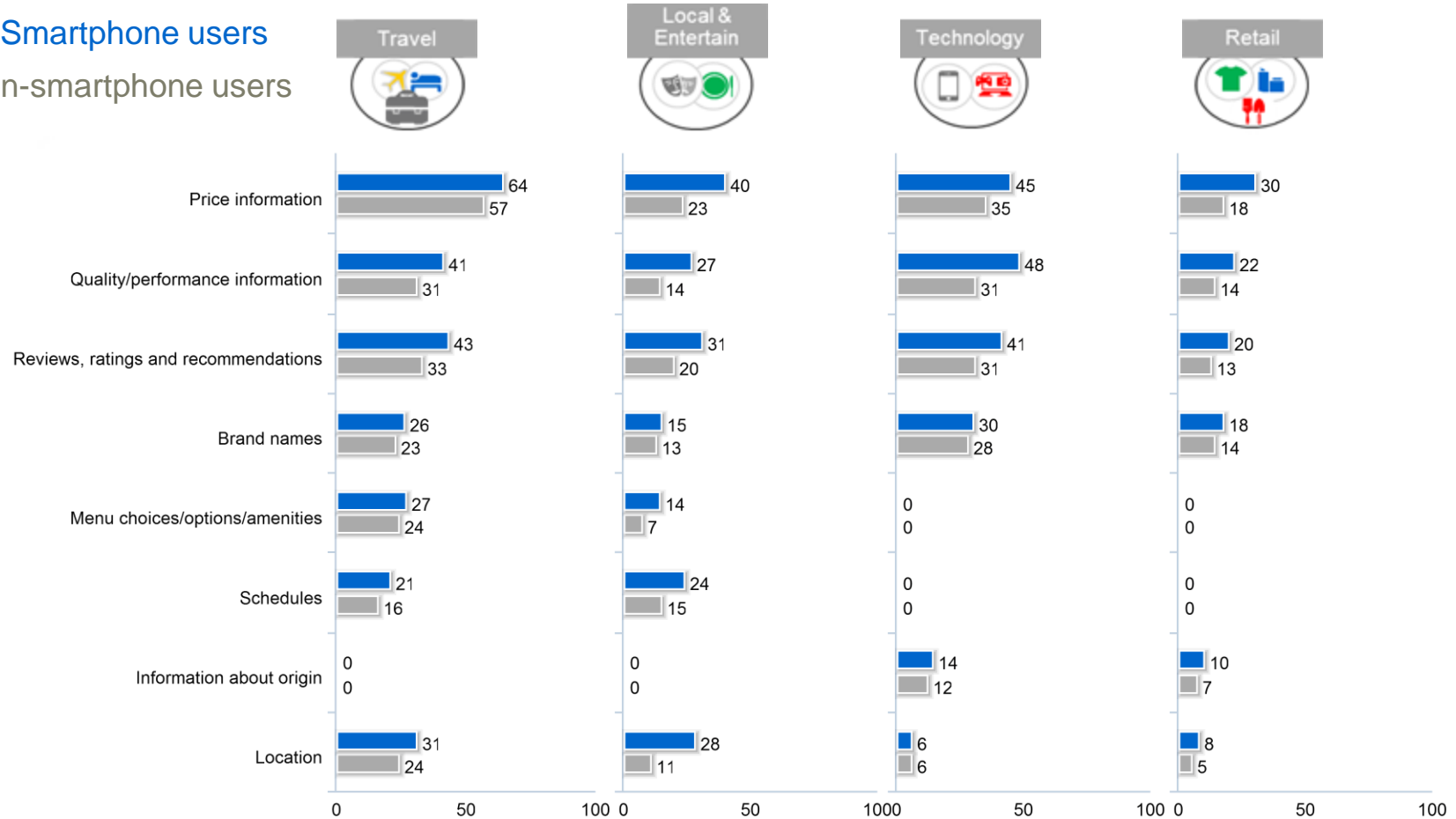|	
Travel	69%
Local & Entertain	77%
Technology	57%
Retail	61%

Filter: Country = Spain

Q21: You mentioned accessing the internet on your smartphone… Did you access it via an app on your smartphone or directly via the mobile internet
Base: Product purchasers in the last 12 months who use a smartphone and who performed mobile search at least
for one product for their last purchase

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What type of information do they look for when shopping?

Smartphone users
Non-smartphone users

	Travel	Local & Entertain	Technology	Retail
Price information	64 / 57	40 / 23	45 / 35	30 / 18
Quality/performance information	41 / 31	27 / 14	48 / 31	22 / 14
Reviews, ratings and recommendations	43 / 33	31 / 20	41 / 31	20 / 13
Brand names	26 / 23	15 / 13	30 / 28	18 / 14
Menu choices/options/amenities	27 / 24	14 / 7	0 / 0	0 / 0
Schedules	21 / 16	24 / 15	0 / 0	0 / 0
Information about origin	0 / 0	0 / 0	14 / 12	10 / 7
Location	31 / 24	28 / 11	6 / 6	8 / 5

Filter: Country = Spain

%

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What about smartphoners? What type of information do they look for on their different devices?

- **Smartphone**
- **Desktop/ tablet**
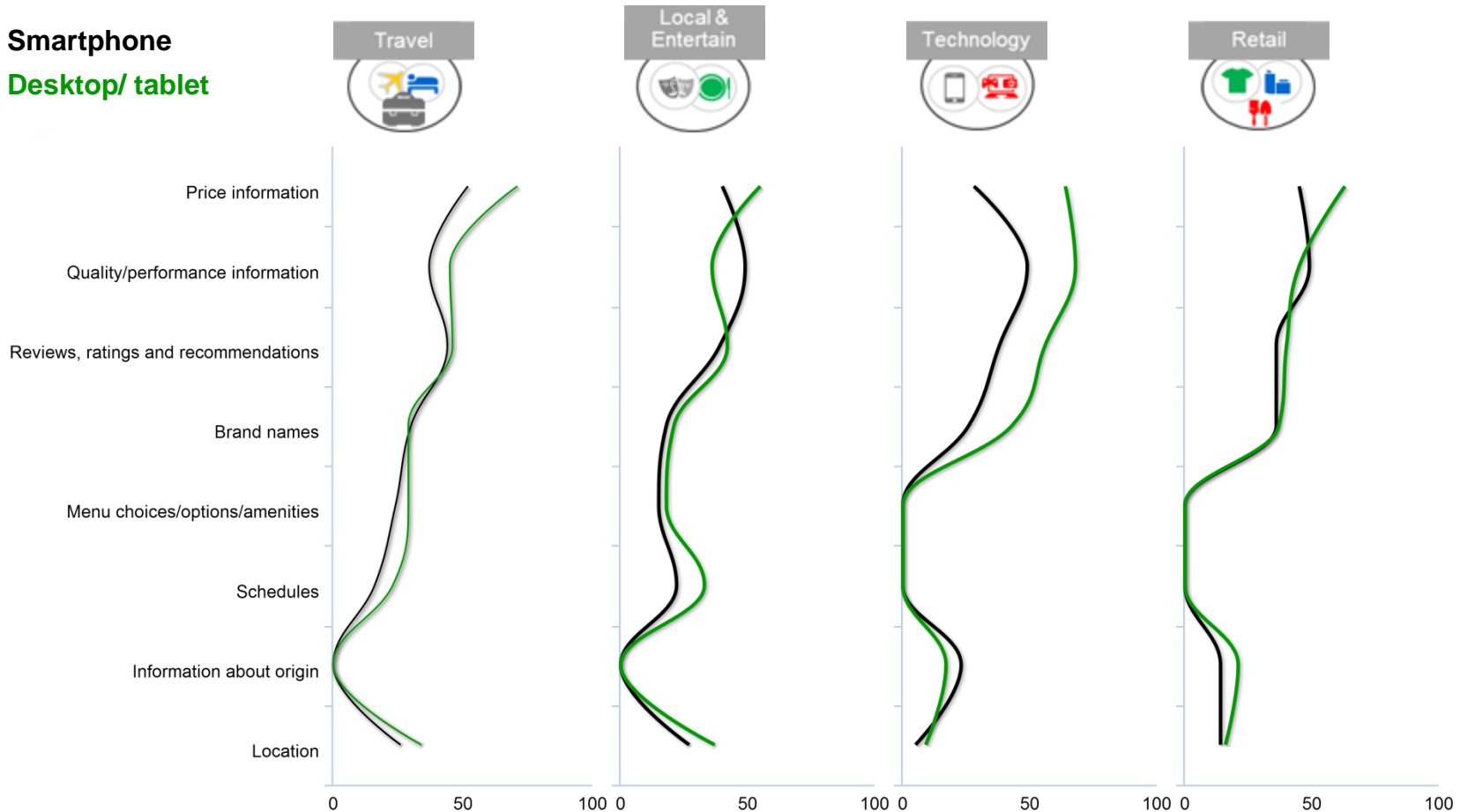
| Travel | Local & Entertain | Technology | Retail |

Price information
Quality/performance information
Reviews, ratings and recommendations
Brand names
Menu choices/options/amenities
Schedules
Information about origin
Location

Filter: Country = Spain

%

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Do smartphoners do multiscreening when researching online for product information?

Researched on several devices in parallel or sequentially

Researched on a smartphone/ desktop/tablet parallel to TV

23 %	19 %	15 %	12 %		24 %	19 %	27 %	16 %
Travel	Local & Entertain	Technology	Retail		Travel	Local & Entertain	Technology	Retail
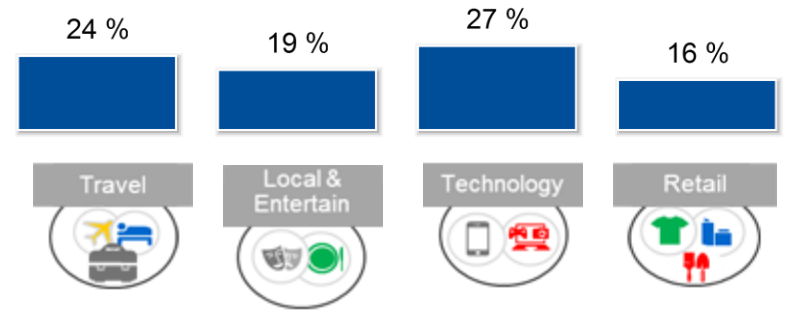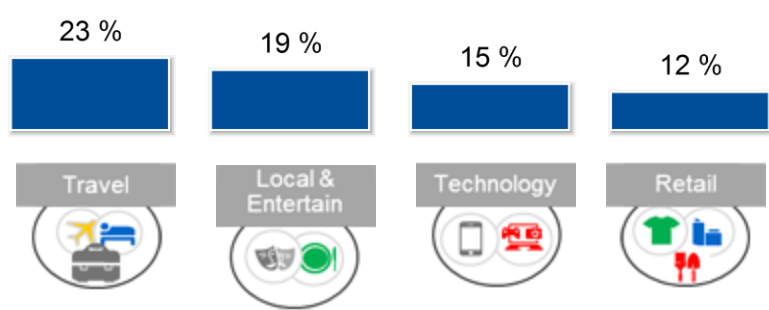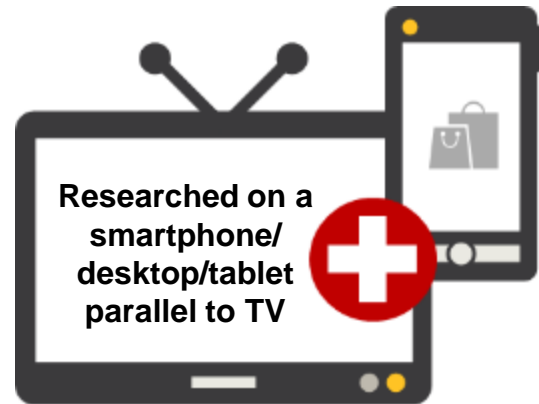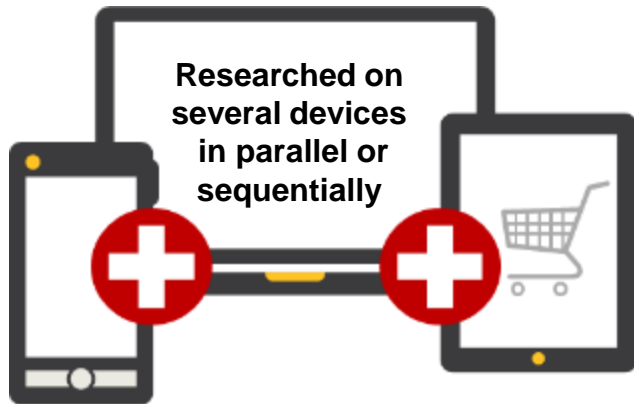
Filter: Country = Spain

Q23: Did you use more than one device to research? Q24: Did you watch TV and look simultaneously on another device for product information?
Base: Purchasers in the last 12 months who use a smartphone

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How is research related to purchase?

Researched online on a desktop/tablet	Researched online on a desktop/tablet & smartphone	Researched offline

| | | **Smartphone users** | | **Non-smartphone users** | |

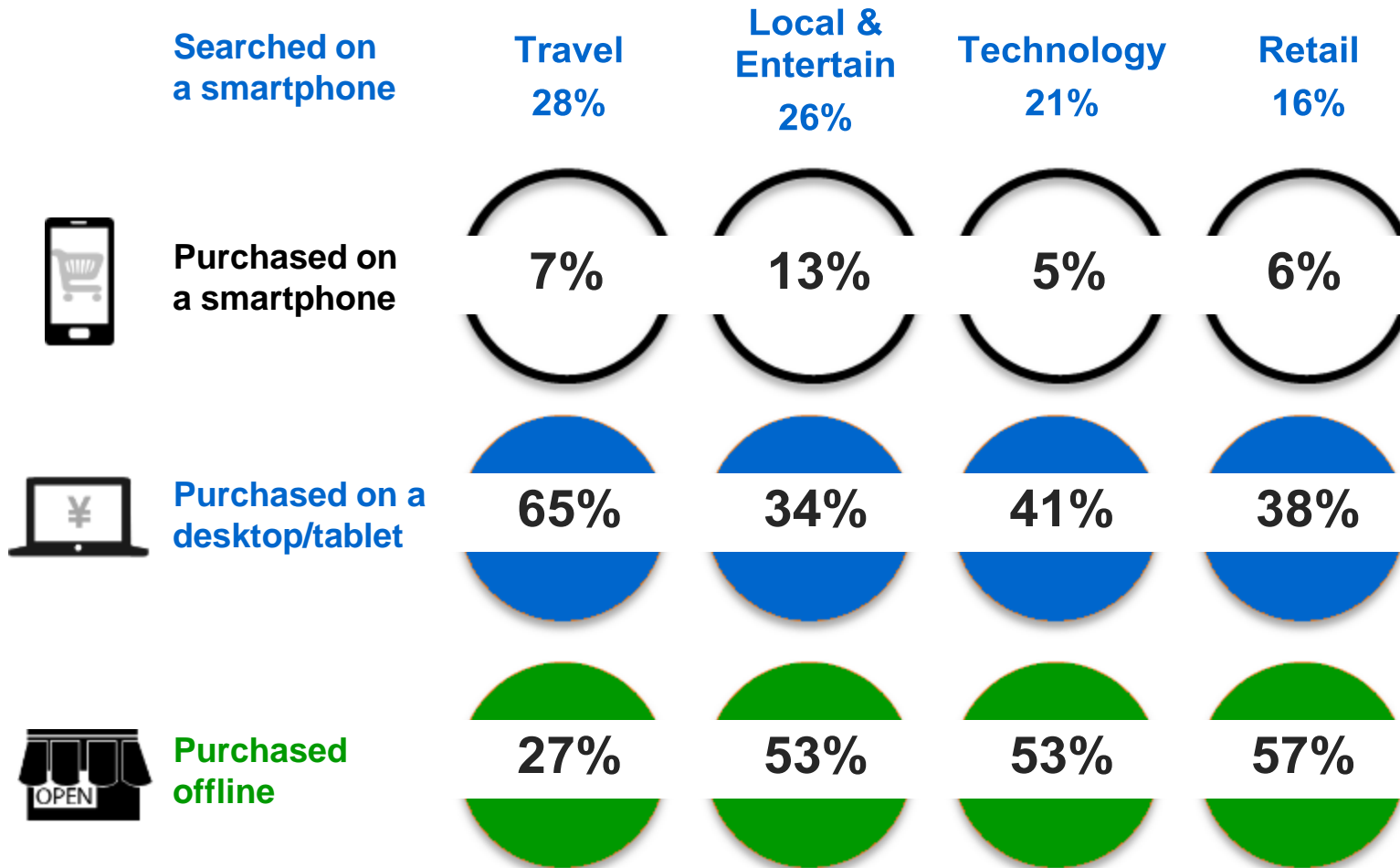| **Purchased on a desktop/tablet**						
	Travel	**79%**	67%	**66%**	**63%**	48%
	Local & Entertain	**49%**	40%	**38%**	**31%**	22%
	Technology	**44%**	30%	**45%**	**31%**	17%
	Retail	**44%**	21%	**43%**	**18%**	5%

Purchased on a smartphone						
	Travel	**1%**	0%	**5%**	**2%**	0%
	Local & Entertain	**4%**	0%	**9%**	**4%**	0%
	Technology	**0%**	0%	**1%**	**1%**	0%
	Retail	**2%**	0%	**4%**	**1%**	0%

Purchased offline						
	Travel	**19%**	29%	**28%**	**33%**	47%
	Local & Entertain	**45%**	52%	**52%**	**62%**	68%
	Technology	**55%**	68%	**52%**	**66%**	80%
	Retail	**54%**	75%	**53%**	**81%**	90%

Filter: Country = Spain

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Following a smartphone research, where is the purchase done?

	Searched on a smartphone	Travel 28%	Local & Entertain 26%	Technology 21%	Retail 16%
📱	**Purchased on a smartphone**	**7%**	**13%**	**5%**	**6%**
💻	**Purchased on a desktop/tablet**	**65%**	**34%**	**41%**	**38%**
🏪	**Purchased offline**	**27%**	**53%**	**53%**	**57%**

Filter: Country = Spain

Q13-Q15: Which sources of information did you seek out to help you with [book/buy product]?
Q22: When you last [book/buy product], where did you actually purchase, book or order it?
Base: Product purchasers in the last 12 months who use a smartphone

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They have a smartphone. Why don't they use it to research a product?

	Not convenient	Screen size too small	No internet usage on my smartphone	Prefer another device
Travel	9%	30%	5%	39%
Local & Entertain	9%	23%	6%	33%
Technology	11%	29%	10%	31%
Retail	14%	25%	8%	29%

Filter: Country = Spain

Q25: Why didn't you use your smartphone to get informed before you purchased the products shown below?
Base: Product purchasers in the last 12 months who use a smartphone

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