Mobile Path to Purchase

Five Key Findings

November 2013

Google

AN UNCOMMON SENSE
OF THE CONSUMER™
Background

A custom Nielsen study, commissioned by Google was conducted to understand the role of mobile in consumers’ path to purchase.

The study explored consumer research and purchase behaviors in 9 different verticals: Restaurants, Food & Cooking, Finance, Travel, Home & Garden, Apparel & Beauty, Automotive, Electronics, Health & Nutrition.

Methodology

950 people participated in this study and responded to a survey based on their mobile related research within a purchase category.

In addition, actual mobile usage was observed by analyzing 14 days of panelists’ mobile metered data.

Respondents met the following criteria for inclusion in this research:

- Age 18+
- Smartphone user
- Made a purchase in at least one of the verticals in the last 30 days

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence and mobile measurement. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands. For more information, visit www.nielsen.com.
Executive Summary

1. Consumers spend time researching on mobile
Consumers spend 15+ hours per week researching on their smartphone and on average visit mobile websites 6 times.

2. Mobile research starts with search
More smartphone users start researching about products or services on a search engine vs. a branded mobile site or app.

3. Location proximity matters to mobile consumers
69% of consumers expect businesses to be within 5 miles or less of their location.

4. Purchase immediacy is key
Over half of consumers want to make a purchase within an hour of conducting research on their smartphone.

5. Mobile influences purchases across channels
93% of people who use mobile to research go on to complete a purchase of a product or service. Most purchases happen in physical stores.
1. Consumers spend time researching on mobile
Consumers research on mobile websites throughout the purchase process

59% visited a Business’s Website

Mobile users who make a purchase visit mobile websites 6 times on average

Google/ Nielsen Mobile Path to Purchase custom study, Nov 2013. Data varies by category.

CQ8: For each of the categories you considered purchasing in the past 30 days, did you do any of the following on your Smartphone?
Consumers spend more than 15 hours per week on mobile research

**Mobile Web Time**
- Monday: 0:48
- Tuesday: 0:54
- Wednesday: 0:51
- Thursday: 1:09
- Friday: 0:38
- Saturday: 1:22
- Sunday: 1:36

**Mobile App Time**
- Monday: 1:08
- Tuesday: 1:03
- Wednesday: 1:08
- Thursday: 1:14
- Friday: 1:25
- Saturday: 1:03
- Sunday: 1:01

7.3 hours per week

8 hours per week

Google/Nielsen Mobile Path to Purchase custom study, Nov 2013
2. Mobile research starts with search
Majority of mobile consumers use search in the shopping process

74% searched on mobile using a Search Engine

41% Health & Nutrition
38% Automotive
42% Home & Garden

Google/Nielsen Mobile Path to Purchase custom study, Nov 2013

CQ8: For each of the categories you considered purchasing in the past 30 days, did you do any of the following on your Smartphone?
Search is the most common starting point for mobile research

48% Start on Search Engines

33% Start on Branded Websites

26% Start on Branded Apps

Google/Nielsen Mobile Path to Purchase custom study, Nov 2013

CQ14a: Thinking back to the last time you researched information about <CATEGORY>> on your Smartphone, on which type of website/app did you begin your search?
3. Location proximity matters to mobile consumers
Close proximity to a business is key to conversions

69% of consumers expect businesses to be within 5 miles of their location

10% expect businesses to be within 1 mile or less
Consumers commonly look for a store’s location on mobile

71% used a Store Locator to find a store

- Restaurants: 61%
- Electronics: 38%
- Apparel & Beauty: 31%

Google/Nielsen Mobile Path to Purchase custom study, Nov 2013

CQ8: For each of the categories you considered purchasing in the past 30 days, did you do any of the following on your Smartphone?
4. Purchase immediacy is key
More than half of mobile consumers want to purchase within an hour

55% Of consumers using mobile to research, want to purchase within the hour

83% Want to purchase within a day
5. Mobile influences purchases across channels
Mobile research influences purchase decisions

93% of people who used mobile to research go on to make a purchase

70% considered making a purchase
54% actually made a purchase

63% considered making a purchase
40% actually made a purchase

61% considered making a purchase
36% actually made a purchase

Google/Nielsen Mobile Path to Purchase custom study, Nov 2013

CQ7: Have you actively considered making a purchase in any of the following categories in the past 30 days?
CQ9: And did you actually make a purchase in any of the following categories in the past 30 days?
Consumers convert primarily in-store and online across devices

- **82%** Purchased in-store
- **45%** Purchased online (desktop/tablet)
- **17%** Purchase directly on their mobile phone
Implications for Advertisers

**Consumers spend time researching on mobile**
Ensure that you have a mobile-optimized site as consumers visit business websites on their phones on average 6 times in their purchase process. Start with a mobile-friendly site for the majority of your visitors and extend to apps for loyal, repeat customers.

**Mobile research starts with search**
As search is the most common starting point for mobile research, be there when potential customers are looking for you. Tailor your search ads with mobile-preferred creatives and specific mobile calls to action, such as “Call now” or “Visit our mobile site.”

**Location proximity matters to mobile consumers**
Help consumers find you by enabling location extensions which let users know how close they are to your business and which provide directions.

**Purchase immediacy is key**
Make it easy for consumers to purchase quickly by enabling click-to-call, showing results of local product availability, and creating easy mobile checkout experiences.

**Mobile influences purchases across channels**
Create seamless experiences across touchpoints and measure conversions across channels that originate from mobile. Take advantage of cross-device conversion tracking and new methods to measure store visits and purchases.