

dot  J W T **MOBILE SHOPPING DURING  
THE 2011 HOLIDAY SEASON**

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## INTRODUCTION

Coming out of the Black Friday and Cyber Monday season in 2011, it was clear that the amount of purchasing being done over mobile devices was surging.

The potential impact of Web-savvy mobile devices on retail environments and e-commerce is enormous, and JWT wanted to understand more about consumer behavior and mobile device use. For instance:

- How do consumers use their devices in retail settings? Are they using their phones for info gathering, price comparison, social validation?
- Are consumers going all the way through the purchase funnel on their mobile devices? How do they feel about the purchasing experience?
- How are consumers using their mobile devices to shop in other settings, for instance, at work or at home?

To answer these questions, we utilized JWT SONAR™ to conduct a new piece of research surveying 465 people who engaged in mobile shopping activity during the 2011 holiday season. This study seeks to answer those questions, and provide more detail around what motivates shoppers to pull their phones out of their pockets.

# Mobile shopping is not mobile purchasing

Mobile shoppers aren't necessarily using their phones to complete the purchase cycle. In fact, of the activities that shoppers use their phones for, purchasing was one of the least popular, with price comparison ranking the highest. Respondents overwhelmingly cited security concerns as the top reason for not completing purchases with their phones.

## HOW MOBILE IS USED FOR SHOPPING

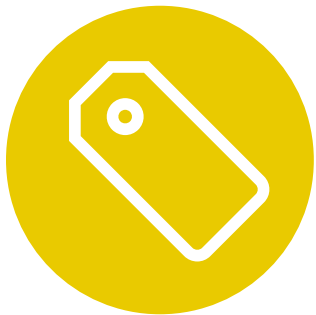
On average, 55% of consumers who shopped on mobile devices in the past year also took the same actions during the holiday season.

Q. Which of the following have you done on your mobile phone or tablet in the past year?

Q. Now, thinking specifically about your 2011 holiday shopping, which of the following have you done on your mobile phone or tablet?

Q. And still thinking about your 2011 holiday shopping, while shopping in a brick and mortar store, which of the following have you done with your mobile phone or tablet?

### 2011 HOLIDAY SHOPPING (ANYWHERE)



For Price Info

55%



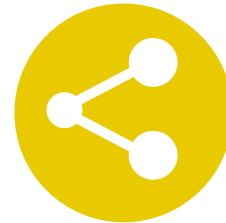
To Talk to  
Family/Friend

44%



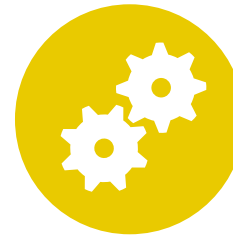
To Get  
More Info

46%



To Share Info

39%



For Tactical  
Reasons

41%



To Make  
a Purchase

**38%**



For Voice  
Interaction

28%

# 「Actually, men do ask for directions」

Men are more likely to use their mobile devices as an in-store companion for all kinds of shopping activities: price comparisons, info gathering and purchasing. Men are more likely to use their mobile phones for shopping purposes in other settings as well.

## HOW MOBILE IS USED FOR SHOPPING BY GENDER

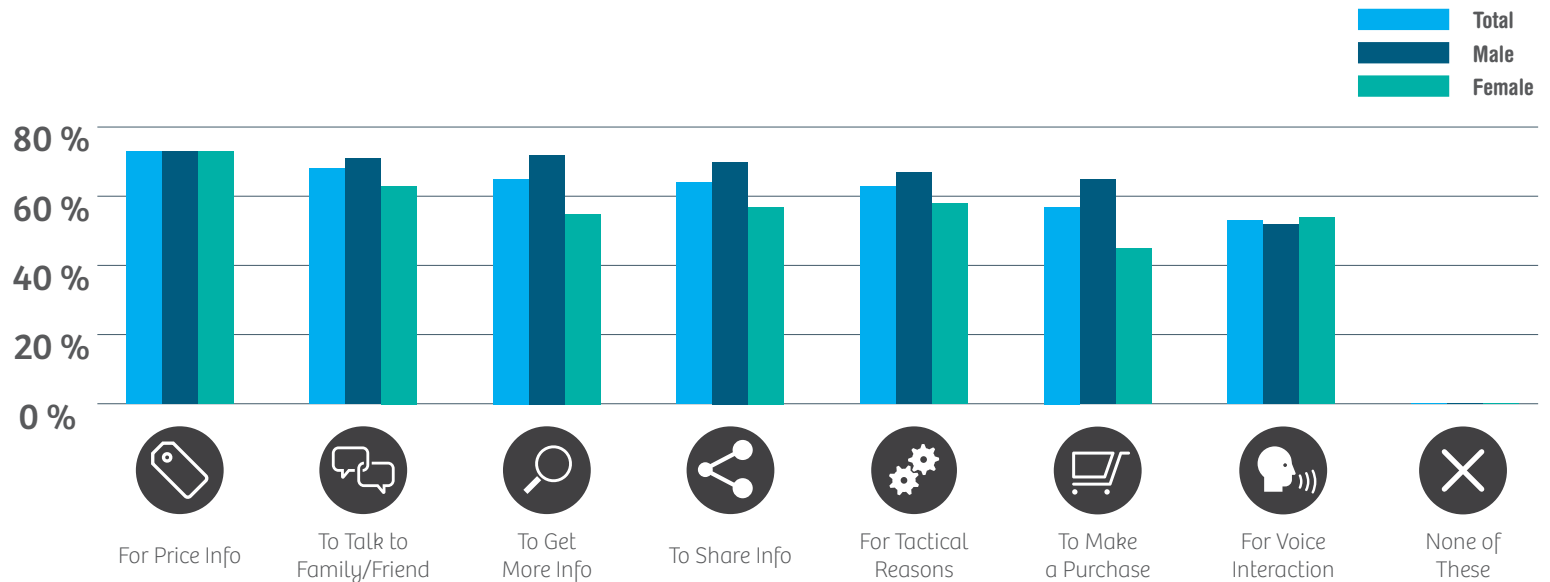
Men are more likely to be using their devices to get more product information and make purchases than women.

Q. Which of the following have you done on your mobile phone or tablet in the past year?

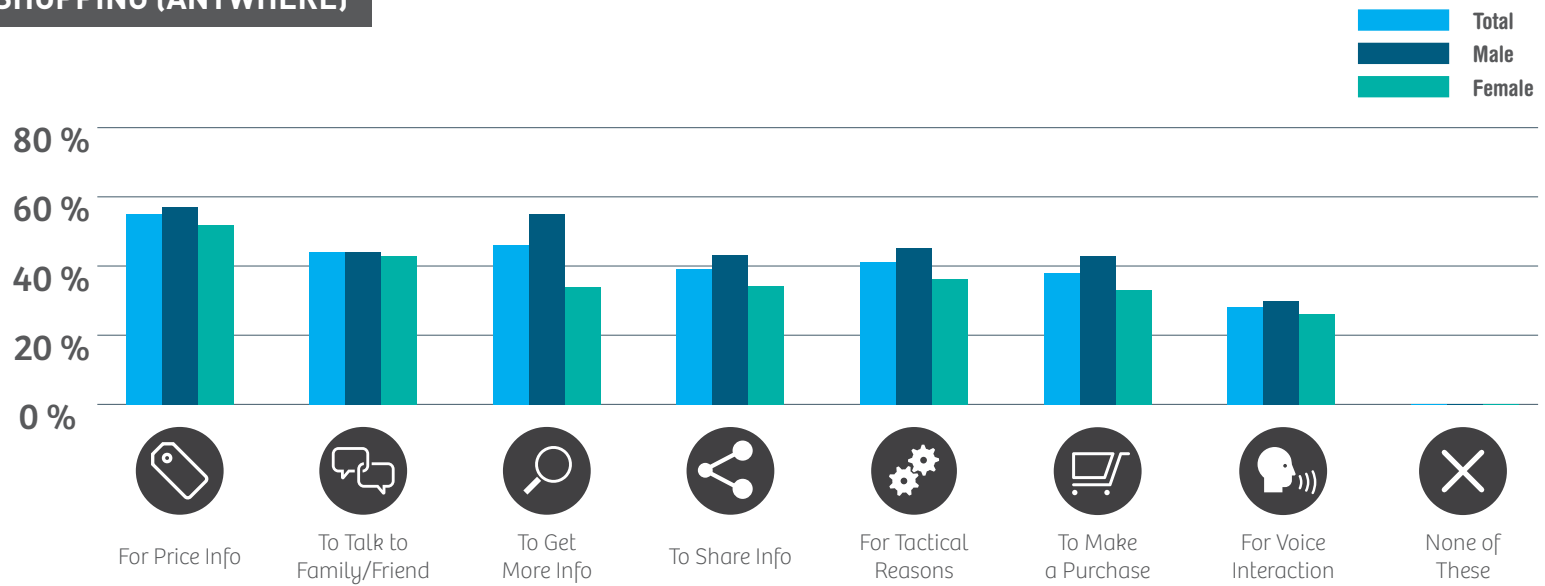
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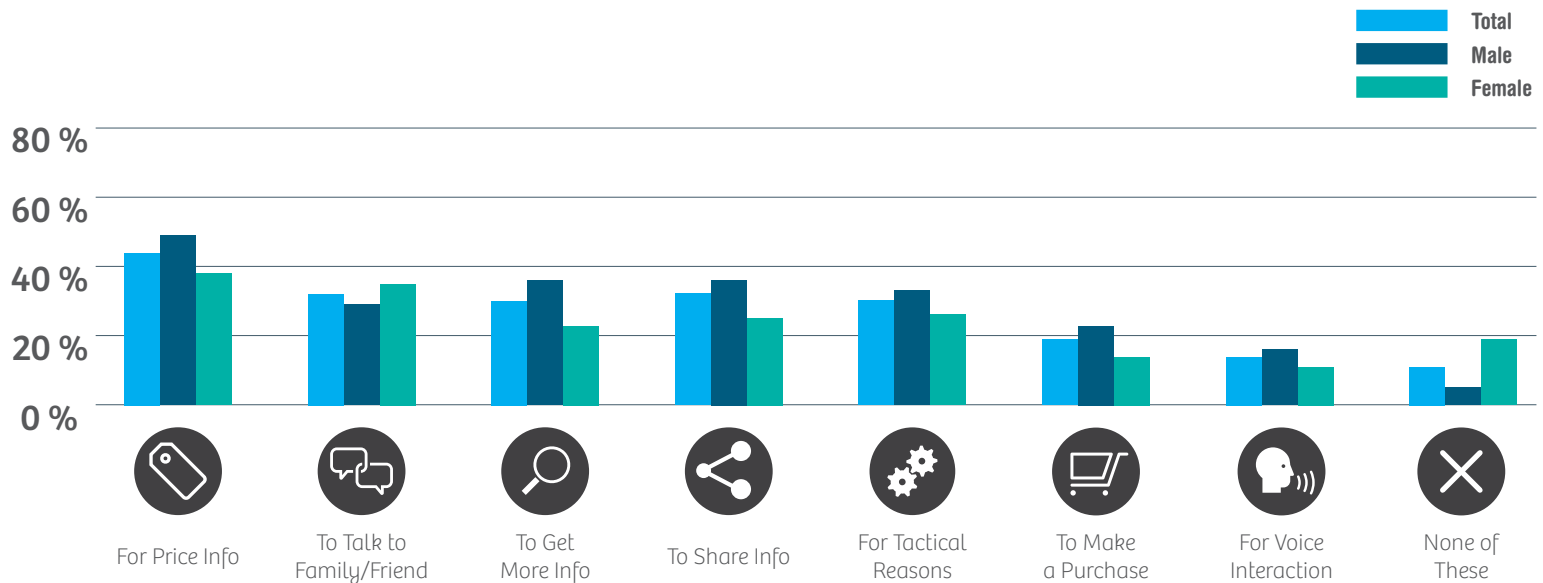
### PAST YEAR (ANYWHERE)



## 2011 HOLIDAY SHOPPING (ANYWHERE)



## 2011 HOLIDAY SHOPPING (IN-STORE)



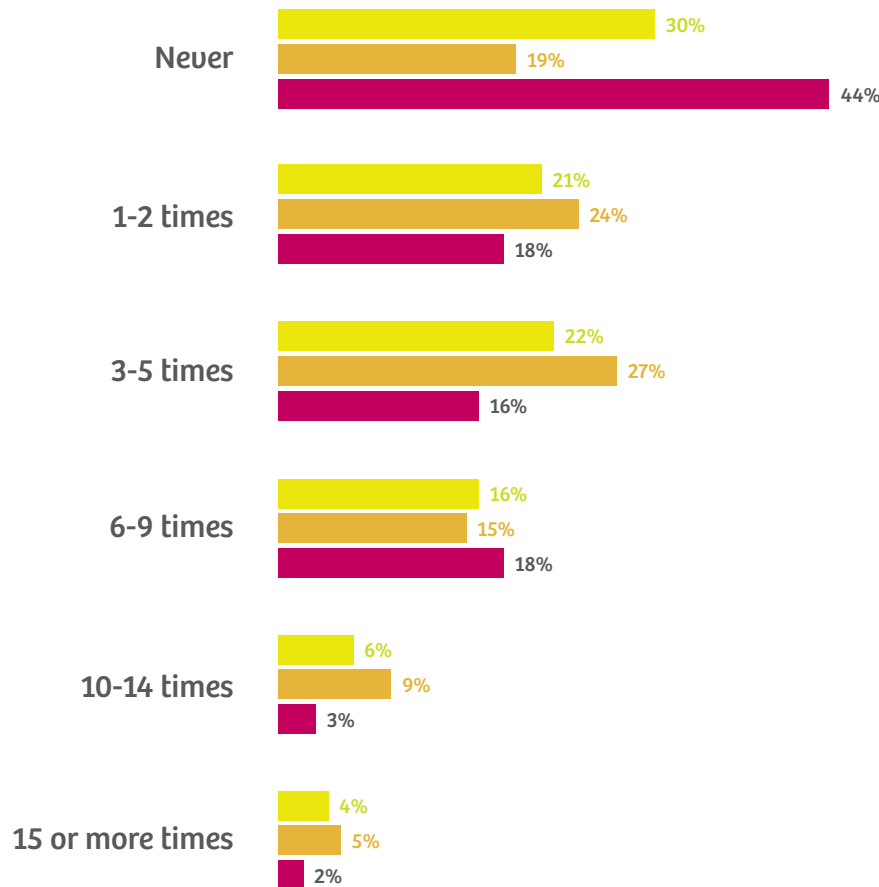
# NUMBER OF MOBILE HOLIDAY PURCHASES

Men and Millennials did the most mobile shopping during the 2011 holiday season.

Q. How many times did you make actual purchases (excl. mobile services) on your mobile phone or tablet during the 2011 holiday shopping season?

## BY GENDER

Total  
Male  
Female



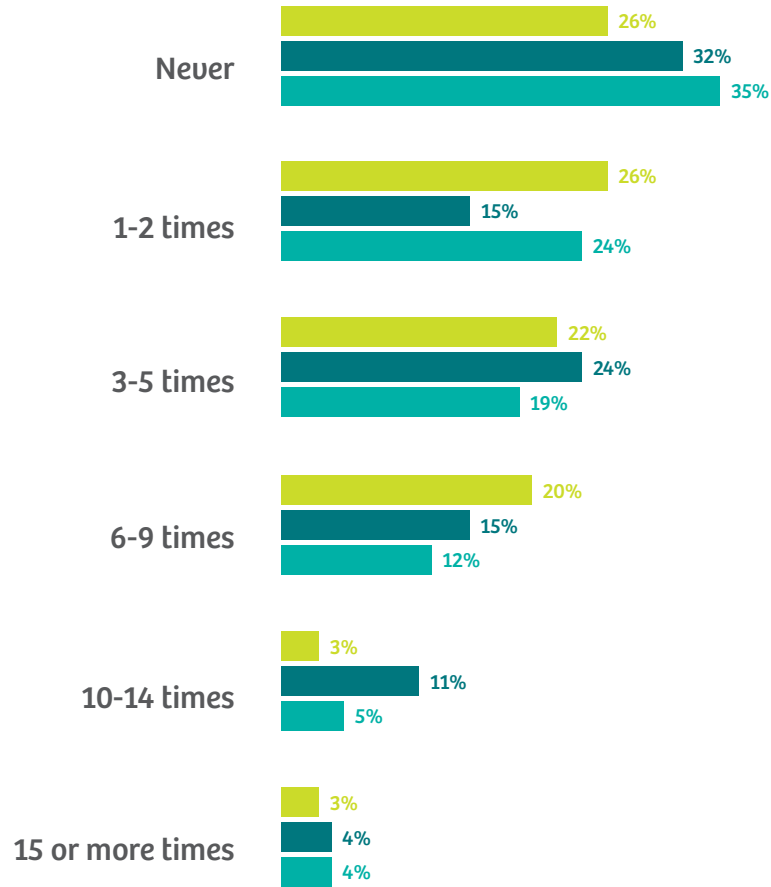
% made purchase:

Total: 70%  
Male: 81%  
Female: 56%



**BY AGE**

- Age 18-29
- Age 30-44
- Age 45+



% made purchase:

Age 18-29: 74%  
Age 30-44: 68%  
Age 45+: 65%

# Mobile devices sometimes trump computers

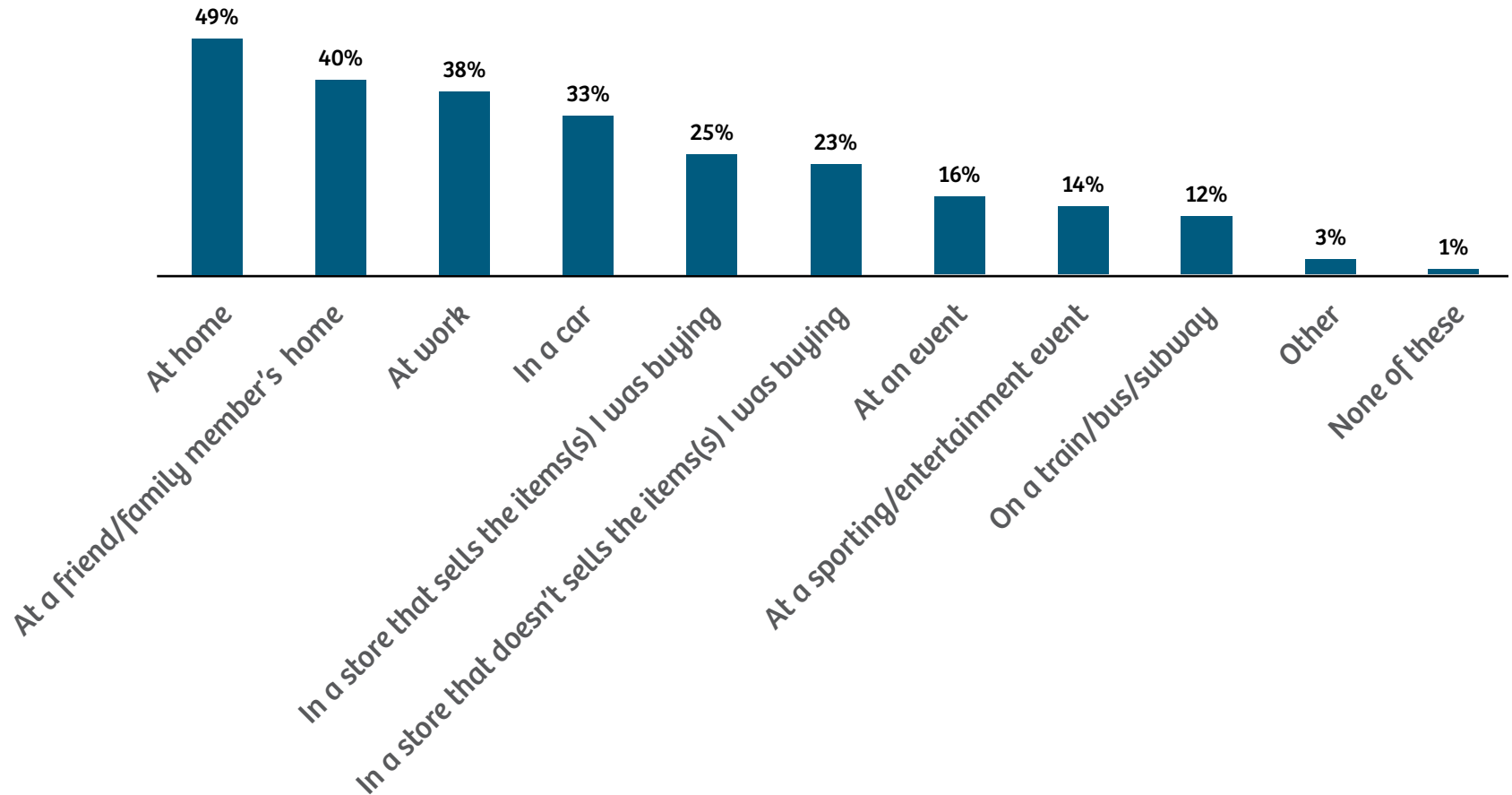
We found that the majority of mobile shopping is done at home, at friends' or family's homes, and at work, where computers are likely to be readily accessible.

## WHERE MOBILE HOLIDAY PURCHASES ARE MADE

Mobile holiday purchases were most likely to be made in places where computers are likely to be readily accessible.

*Q. At which of the following places were you when you made holiday purchases with your mobile device? (Among mobile purchasers.)*

### TOTAL POPULATION



# Mobile shoppers are using new tools to buy the same stuff

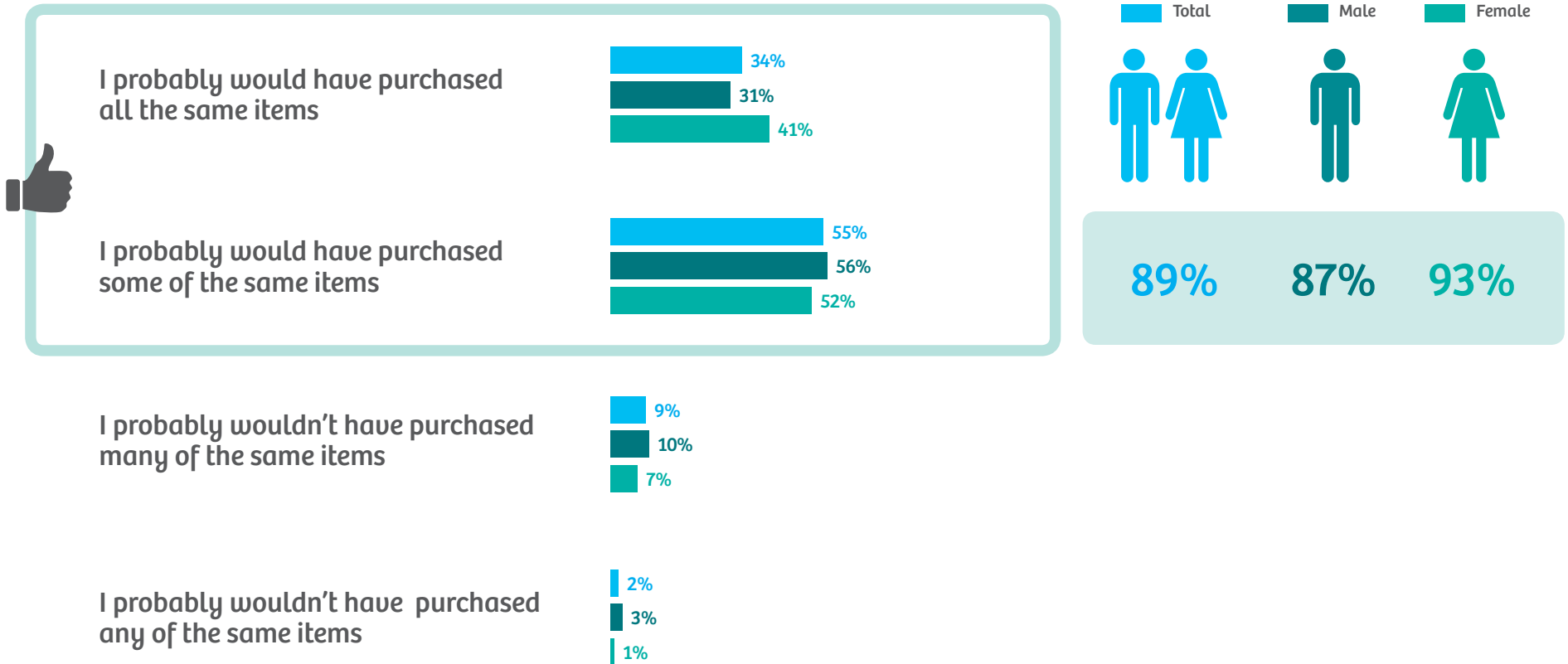
The vast majority of mobile purchasers say they would have purchased all or some of the same items, whether or not they were shopping for them on a mobile device. So while mobile purchasing trends don't have a huge effect on goods bought/sold, they do establish a new commerce channel with a potentially different purchase funnel.

# WHETHER WOULD HAVE PURCHASED THE SAME ITEMS WITHOUT MOBILE

The vast majority of mobile purchasers say they would have purchased all or some of the same items if they didn't have a mobile device for shopping.

*Q. If you didn't have a mobile device, would you have purchased the same items? (Among mobile purchasers.)*

## BY GENDER



BY AGE



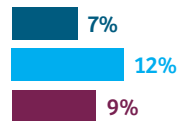
I probably would have purchased all the same items



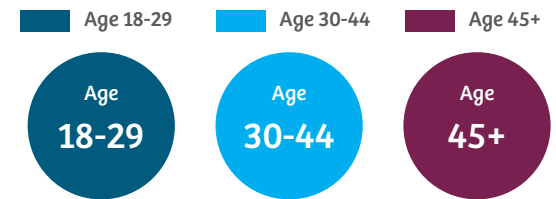
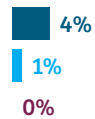
I probably would have purchased some of the same items



I probably wouldn't have purchased many of the same items



I probably wouldn't have purchased any of the same items



89%

87%

93%

┌ Mobile shoppers say  
they are satisfied with  
the experience...└

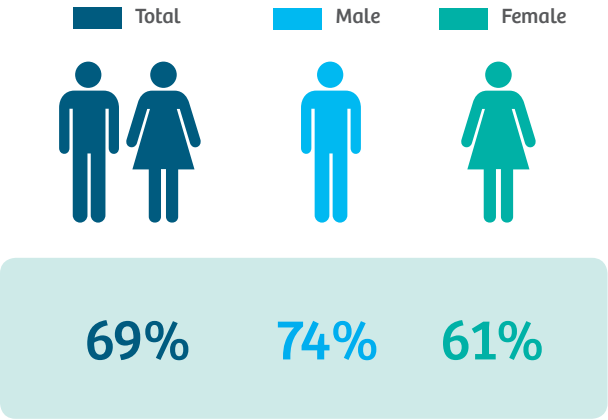
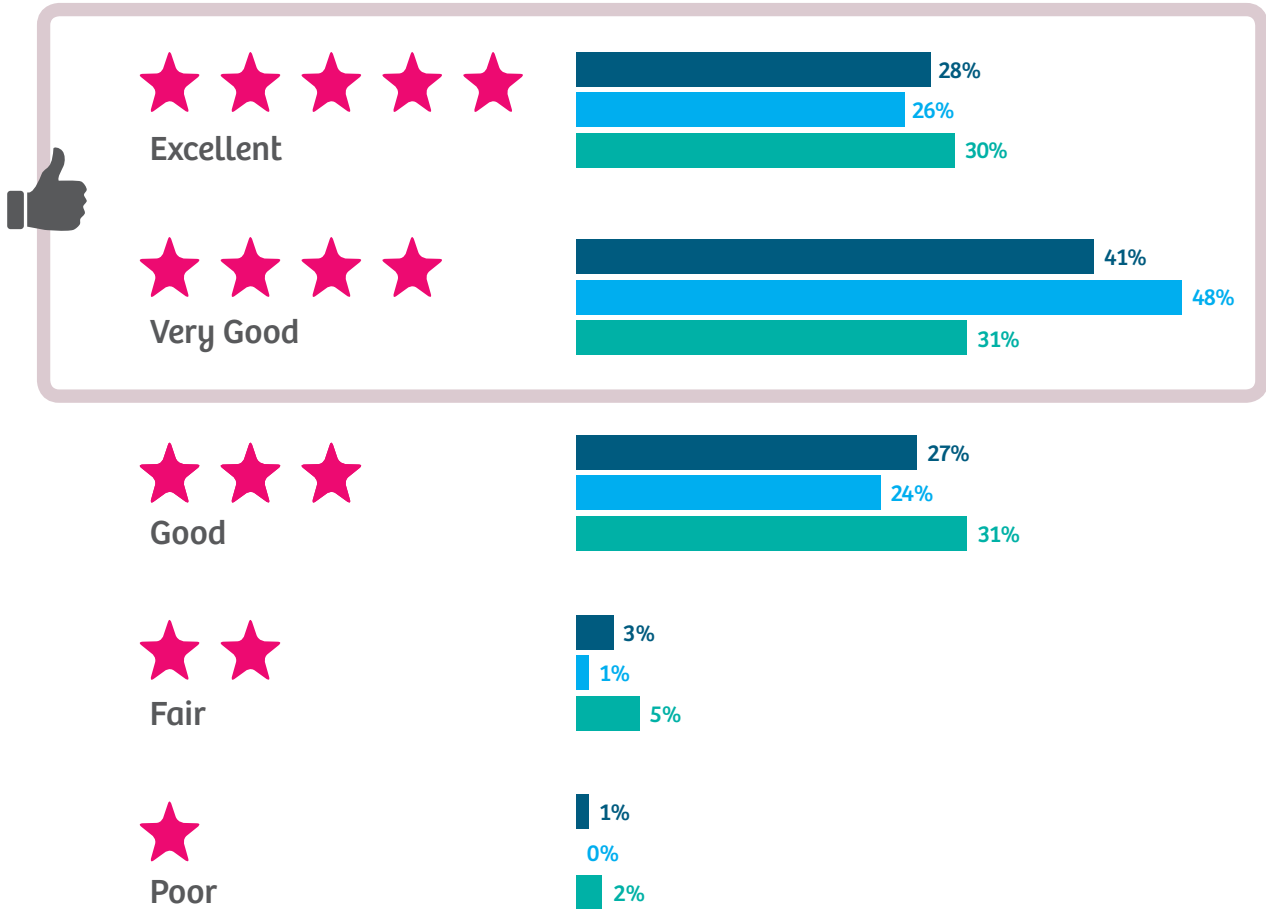
Of those who shop on their mobile device, 69% say the mobile shopping experience is either “excellent” or “very good.” When asked why, respondents tended to point to the convenience of using a mobile device versus standing in line, and being able to make purchases while they were top of mind. (For additional context, see item No. 5 “Anywhere. Any-Way Shopping,” in JWT’s 100 Things to Watch in 2012.)

# RATING OF MOBILE SHOPPING

The overall mobile shopping experience is a positive one. Men and Millennials are most satisfied with the mobile shopping experience.

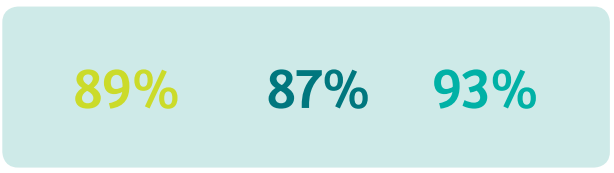
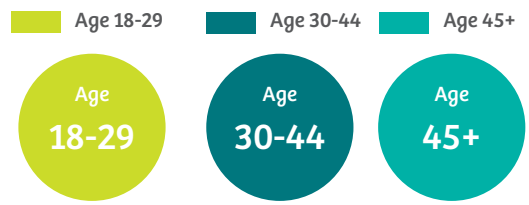
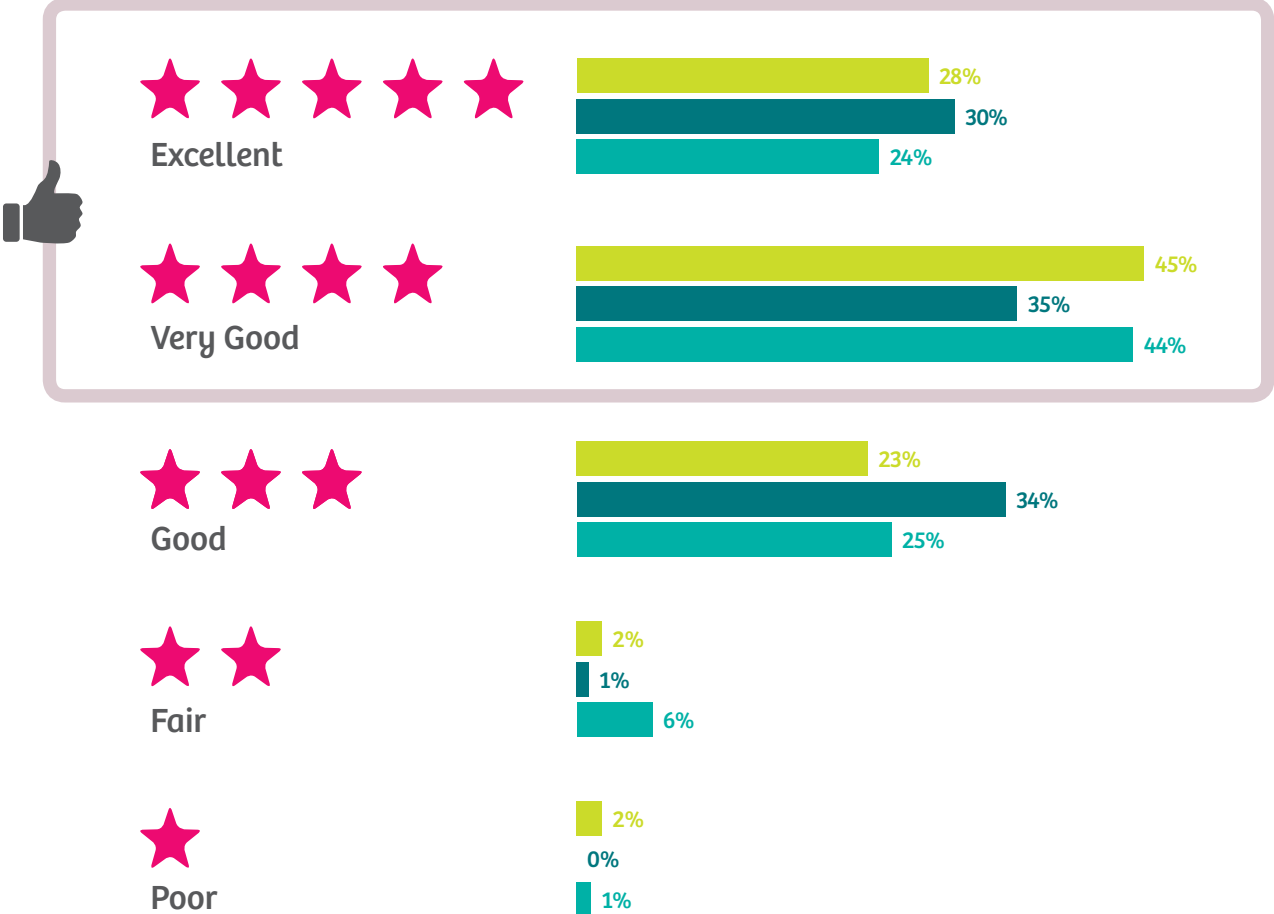
*Q. How would you rate your overall mobile shopping experience during the 2011 holiday shopping season?*

## BY GENDER





**BY AGE**



## MOTIVATIONS FOR PURCHASING WITH MOBILE DEVICE

Consumers purchase on their mobile phones for convenience and ease, often when they are already in a store or too busy to go to a store.

*Q. What motivated you to make holiday purchases using your mobile device as opposed to purchasing on a computer or directly from the store? (Among mobile purchasers.)*

Access Amazon Available A way Better Buy Cheaper  
Compare Computer Convenience  
Crowds Deals Desktop Device Ease  
Easier Easy Fast Faster Holiday Home Item Laptop  
Lines Looking Mobile Na Needed None Online Order Phone  
Price Product Purchase Quick Quicker Sale Save  
Shipping Shopping Something Store Sure Thought  
Usually Waiting Wanted Work

*"It's quick and easy and I can do it anywhere." (F30-34)*

*"Not wanting to wait in lines and avoid the crowds." (M30-34)*

*"Seeing the product at store, check the same product on the mobile, being cheaper I placed the order." (M55-59)*

*"Sometimes I don't have the time to go to the store and that's one reason of why I use my mobile device." (M18-24)*

*"I had what I wanted to buy fresh in my mind and the store didn't have it, so I bought it on my mobile device." (F40-44)*

*"It is easier to purchase products on your mobile device because we carry our cell phones or tablets everywhere we go and you avoid doing long lines when you can purchase from wherever you are." (M25-29)*

*"I found what I wanted and didn't want to look again. I have a credit card on file at the store so it was easy." (F65+)*

*"Wanted to get the item before it sold out." (F30-34)*

*"It is very convenient to make purchases online. It is also fast and easy to order the item as opposed to standing in long lines for them." (F18-24)*

*"I could make a purchase right when I was thinking about it, rather than later—I could also compare prices." (F40-44)*

┌ ...but the satisfaction  
is likely temporary └

Despite the positive feedback about convenience, there is plenty of room for improvement, particularly in the user experience of the commerce sites themselves. When asked what they would improve, our respondents complained about the difficulty of navigating mobile shopping sites, lack of product information on those sites, and the need for better mobile shopping apps. And one of the biggest consumer obstacles, perception of security, needs to be addressed more fully before a broader swath of consumer is comfortable entering credit card info via smartphone.

## SUGGESTED MOBILE SHOPPING IMPROVEMENTS

Consumers would like to see more apps that make the mobile shopping experience faster, easier and more secure.

*Q. Thinking about all the websites and apps you accessed with your mobile device for holiday shopping, what, if anything, would you like to see changed to improve the experience?*

Access Ads Amazon Anything **Apps** Better Change  
Com Compare Cost Coupons Device Easier Everything  
Experience **Faster** Happy Improve Info Information Internet iPhone  
Items Loads Looking Mind **Mobile** Navigate  
Online Pay **Phone** Prices Product Quicker  
**Security** Service Shipping Shopping Sites  
Speed Stores **Sure Think** Used Web Websites

*"An app that would compare all local pricing on an item." (F40-44)*

*"Stores should have more free wireless Internet." (F30-34)*

*"Sites that are more phone friendly. Sometimes it is hard to navigate certain sites on my mobile device." (M30-34)*

*"I would like the experience to be faster." (M30-34)*

*"I would like to know more about what shopping apps are available." (F18-24)*

*"More coupons and special offers." (F25-29)*

*"Feeling secure with my information being safe will always concern me." (F50-54)*

*"I wish that product descriptions were more comprehensive on mobile apps. Quite often, the information they provide is the bare minimum and not much compared to what's on the Web on your computer." (F30-34)*

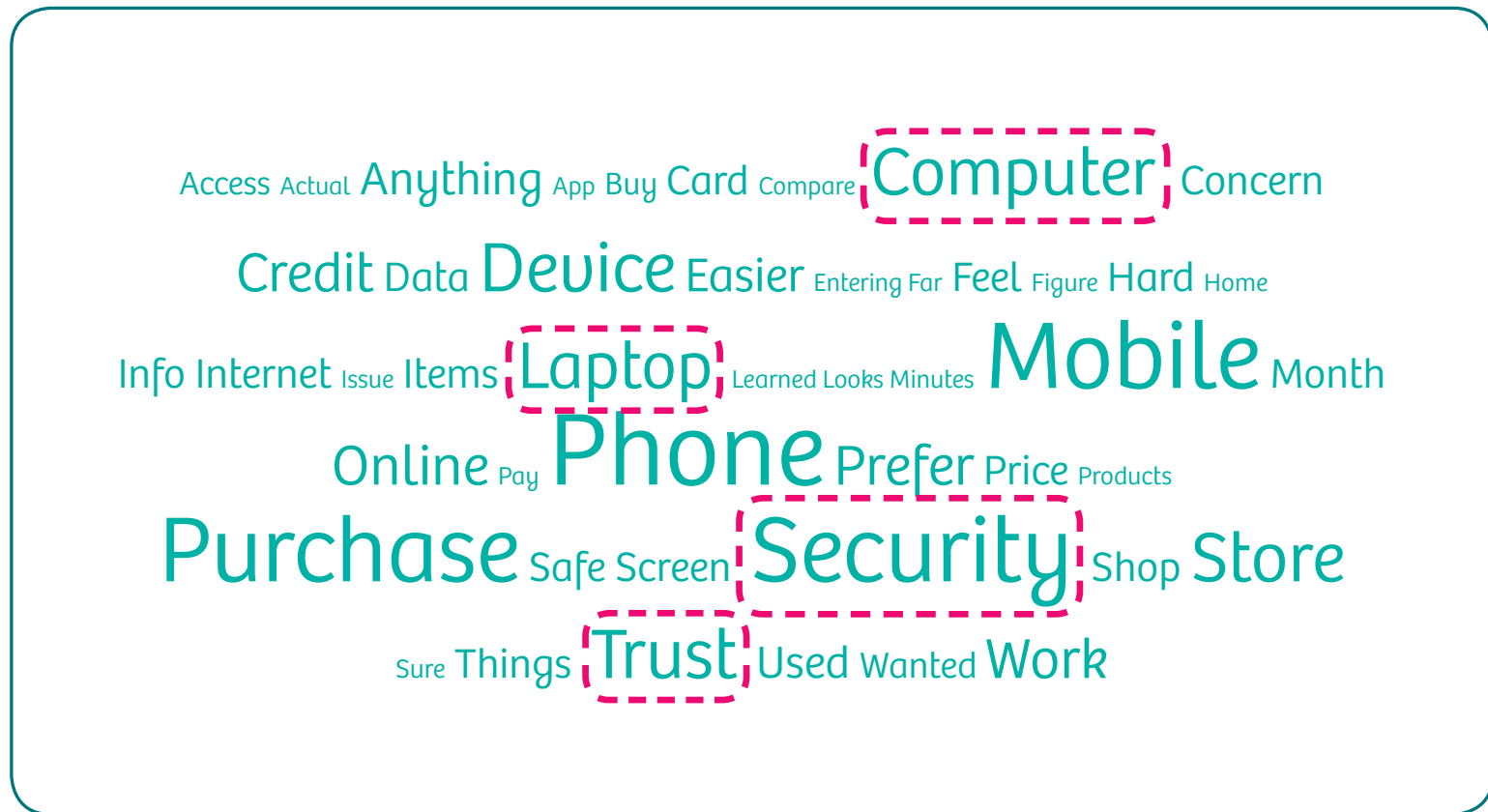
*"Full access to a site. At times mobile apps are limited compared to the actual site used with a laptop or desktop." (M25-29)*

*"Easier navigation with drop-down menus—most of the time, there isn't a way to have them 'drop' down because there is no mouse to hover over the option." (M25-29)*

## REASON FOR SHOPPING BUT NOT BUYING

Security is a major concern, leading many consumers to do their research using a mobile device but make their actual purchases online or in a store.

*Q. You mentioned you used your mobile device for this year's holiday shopping. Why haven't you made any actual purchases on your mobile device? (Among non-purchasers.)*



*"I bought it at the store. Didn't want to pay for shipping." (F30-34)*

*"Prefer to do research on the mobile device but like to do in-store shopping." (F18-24)*

*"Because it is easier online from a computer." (M50-54)*

*"Security is always a must. I don't feel that security is as great on mobile devices." (M40-44)*

*"I prefer to do it online on a bigger screen and where I feel it's a little more secure than my phone." (F25-29)*

*"Waited to use a laptop to have more access to a site along with better visibility before making a purchase." (M25-29)*

*"I do not trust purchasing through a mobile phone yet." (F25-29)*

*"I really don't know what kind of secure connections are provided through my iPhone, so I prefer to just use my laptop at home for purchases. It's always annoying to try and type in a long credit card number on the tiny keyboard of an iPhone." (F30-34)*

*"I'm not comfortable entering my credit card data on my mobile phone" (F60-64)*



## CONCLUSION

### What this means for brands...

1. Mobile does not mean out of home. People are actively selecting mobile over computer screens, which means development of mobile sites needs to be viewed internally as a channel separate from online and not an extension of the online site.
2. Do not let the current satisfaction with mobile shopping experience make you complacent. The experience needs to constantly evolve such that when the novelty of the channel wears off, engagement remains high.
3. Retail brands, especially, must invest in highly intuitive and easy to use mobile experiences that focus on satisfying both aesthetic and information needs of the products.
4. We know that men and women shop differently. This difference is amplified when it comes to mobile shopping. Marketers will need to design mobile sites with both constituents in mind. While the functionality of the transaction has to work exceptionally well, product merchandization on mobile sites and applications is equally important. Merchandise will need to be displayed to appeal to the emotional and aesthetic preferences of women shoppers and address facts, information and specifications to reflect male shoppers' desire to understand a purchase and make an informed decision.

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