



Mobile Path to Purchase

Five Key Findings

November 2013



AN UNCOMMON SENSE
OF THE CONSUMER™

Background & Methodology

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.



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.

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

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%

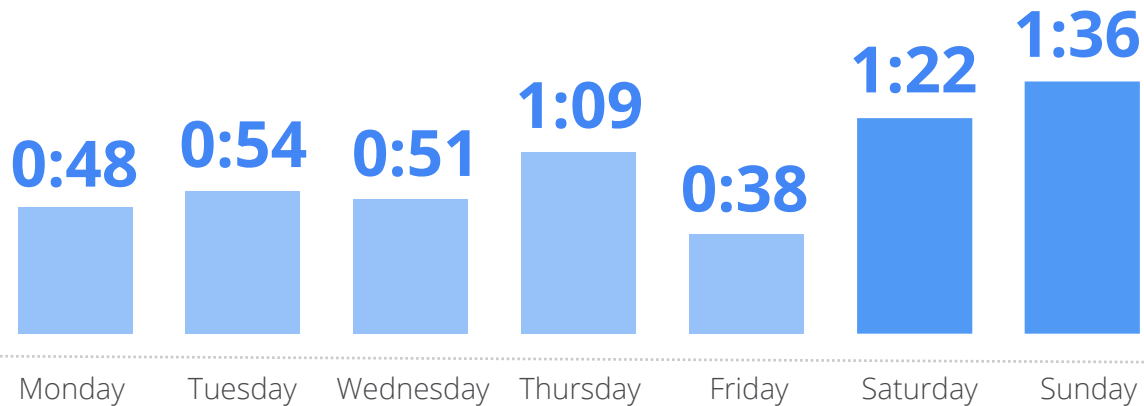
visited a
Business's Website

Mobile users who
make a purchase
visit mobile websites

6 times on
average

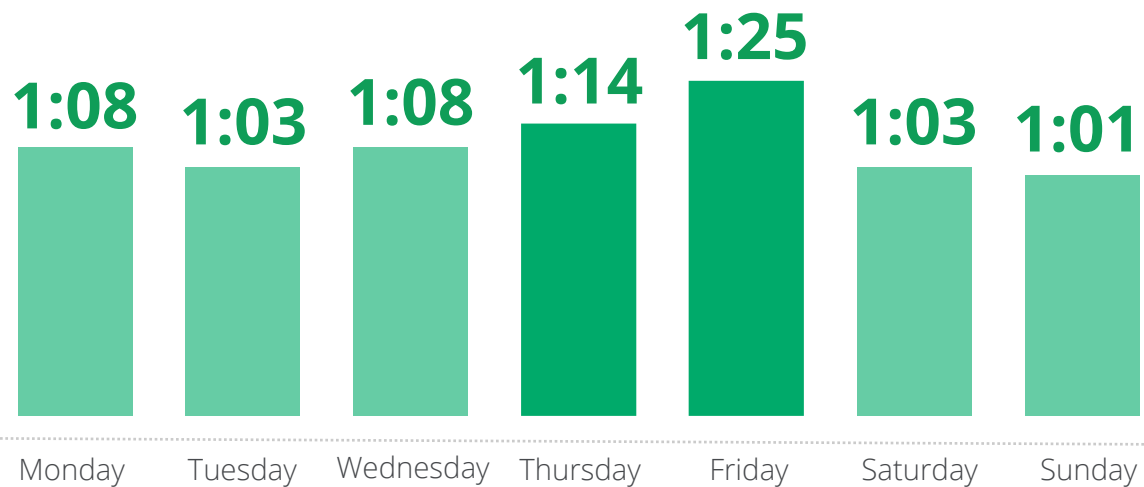
Consumers spend more than 15 hours per week on mobile research

Mobile Web Time



7.3
hours per week

Mobile App Time



8
hours per week

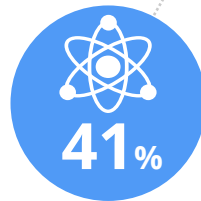


2. Mobile research starts with search

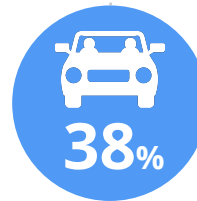
Majority of mobile consumers use search in the shopping process



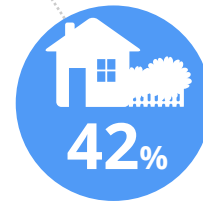
74% searched on mobile using a **Search Engine**



Health & Nutrition



Automotive



Home & Garden

Search is the most common starting point for mobile research



48%
Start on
Search Engines

42%



Automotive

41%



Home &
Garden

38%



Apparel &
Beauty



33%
Start on
Branded Websites

31%



Finance

31%



Apparel &
Beauty

27%



Automotive



26%
Start on
Branded Apps

36%



Finance

22%



Electronics

21%



Apparel &
Beauty



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

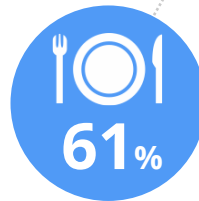
10%

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



Electronics



Apparel & Beauty



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**



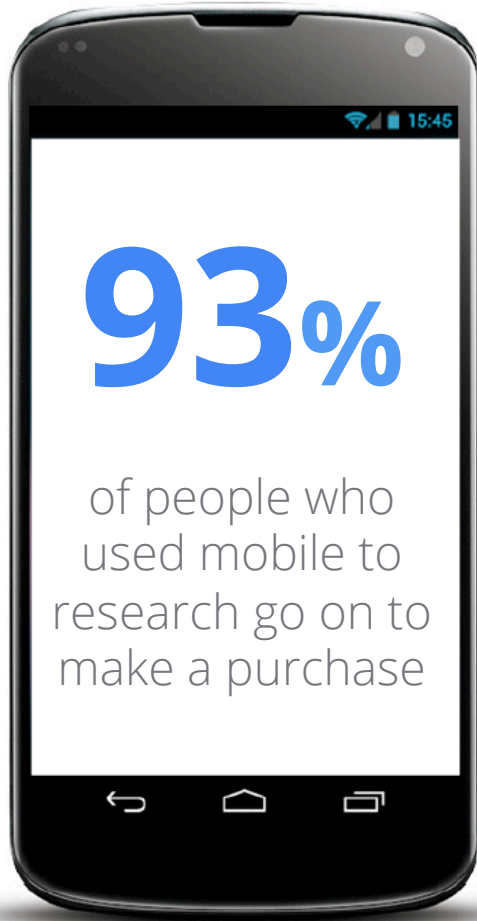
83%

Want to purchase **within a day**



5. Mobile influences purchases across channels

Mobile research influences purchase decisions



Restaurants

70%

considered

making a purchase

54%

actually

made a purchase



Apparel &
Beauty

63%

considered

making a purchase

40%

actually

made a purchase



Electronics

61%

considered

making a purchase

36%

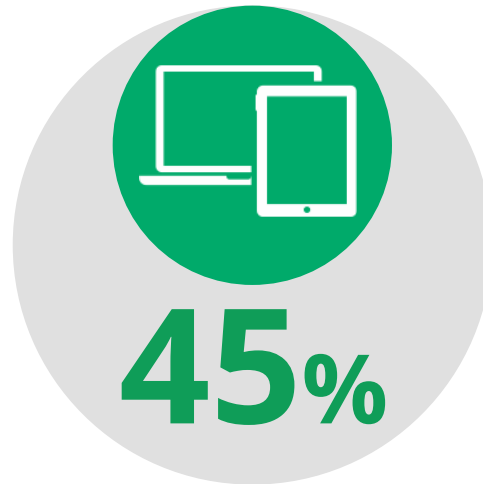
actually

made a purchase

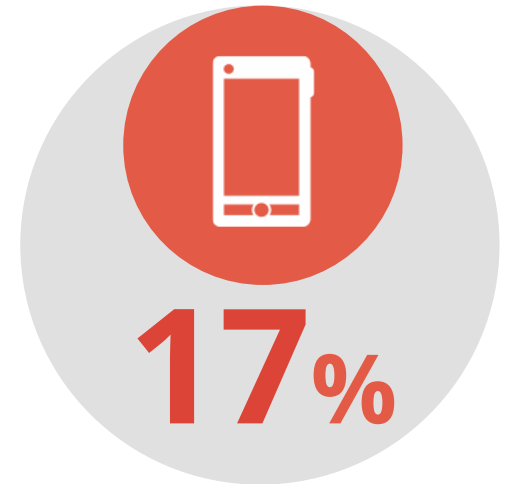
Consumers convert primarily in-store and online across devices



Purchased
in-store



Purchased
online
(desktop/tablet)



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.



Mobile Path to Purchase