Mobile Path to Purchase
Five Key Findings
November 2013
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.

**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

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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

Total: 7.3 hours per week

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

Total: 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

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

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

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

CQ18: And when looking up information for categories purchases on your Smartphone, which of the following do you expect regarding the location of the business?
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
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**

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

- 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

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

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

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