

The New Digital Consumer in a Multi-Device World

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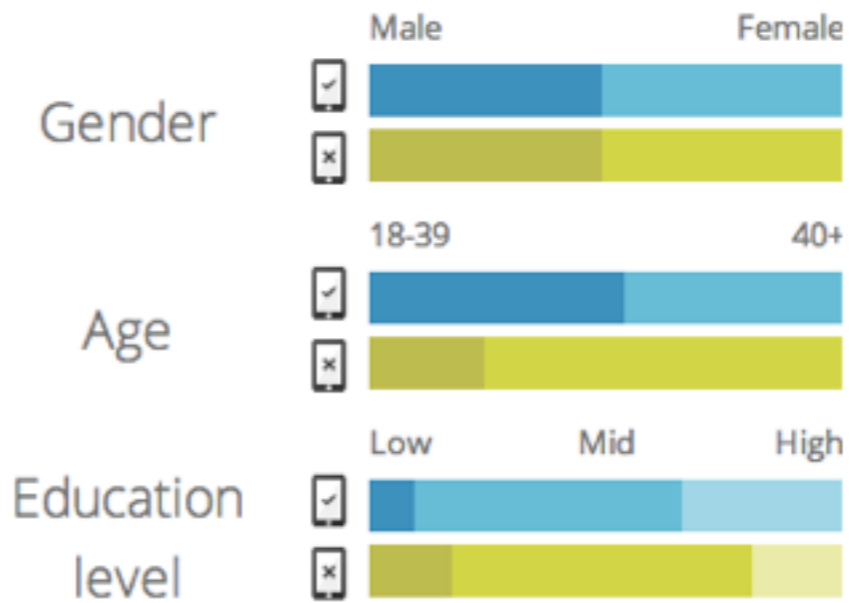
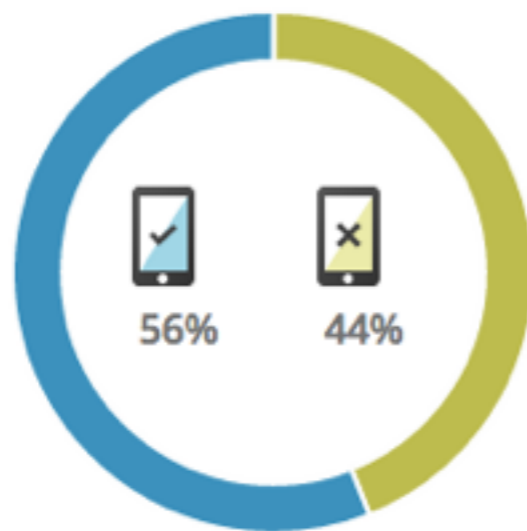
Ready Set Rocket®

**Who is the new
consumer?**

Today's new consumer is highly connected and engages with brands across many devices (mobile, tablet, desktop, wearable) via multiple channels (social, email, web, in-store).

We surveyed smartphone users and non-smartphone users

Smartphone users vs.
non-smartphone users

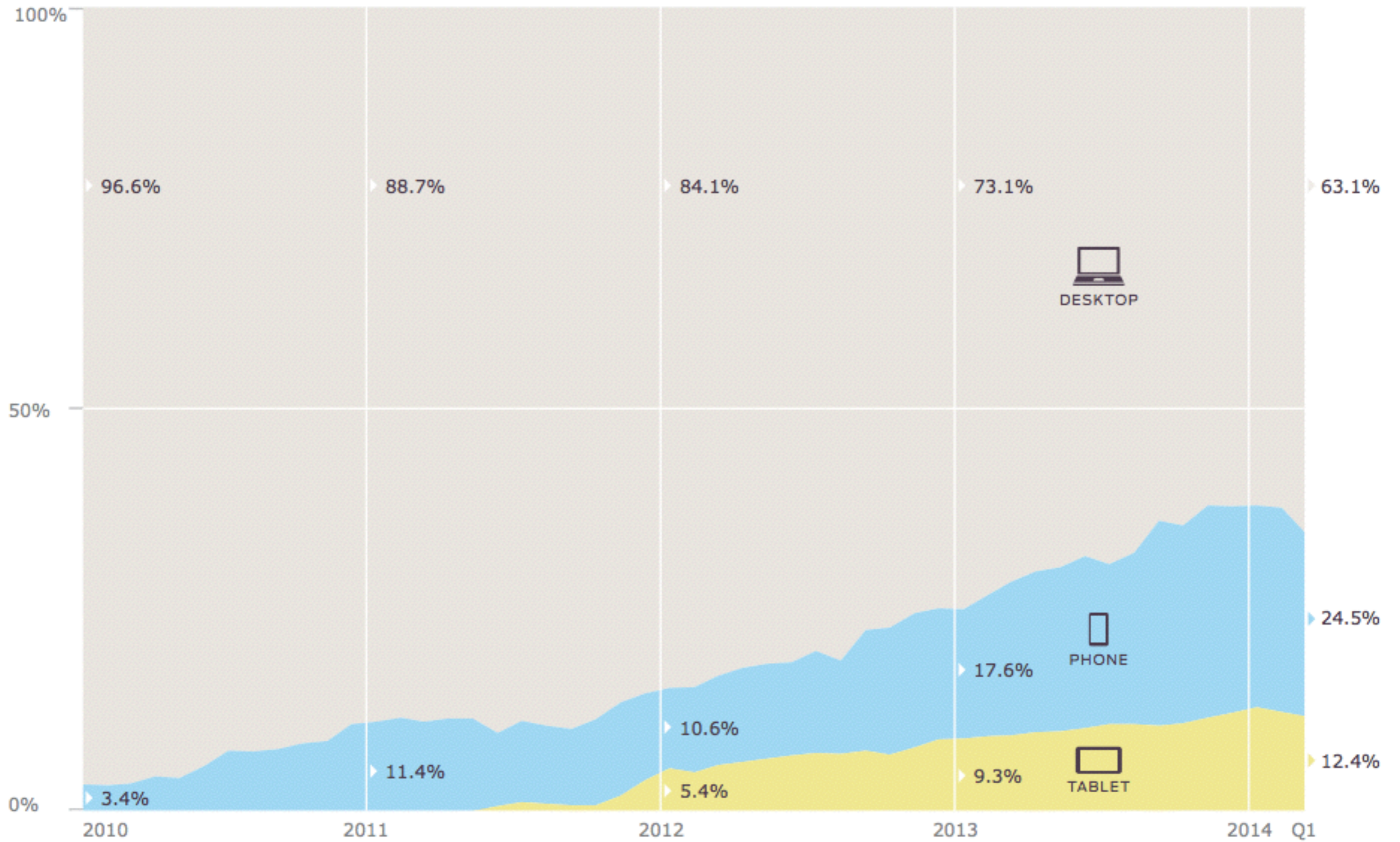


■ Smartphone users ■ Non-smartphone users

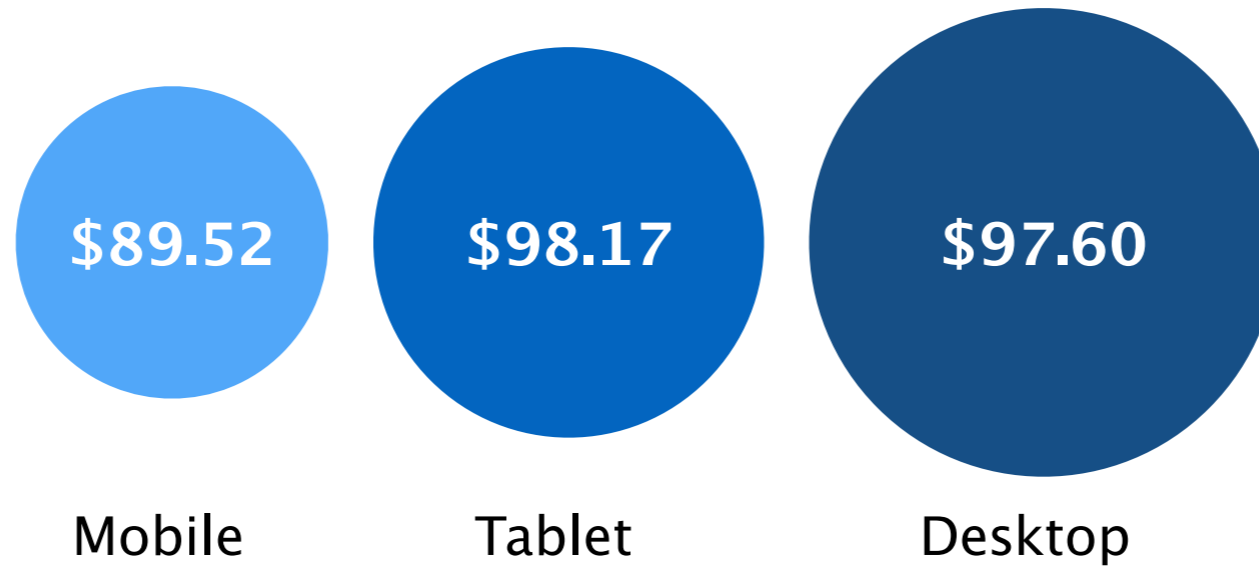
**What is the new customer
journey?**

More than a third of visits to online stores now come from mobile devices. In the past four years, the percentage of traffic to eCommerce sites from mobile devices (phones and tablets) jumped from 3% to nearly 37%.

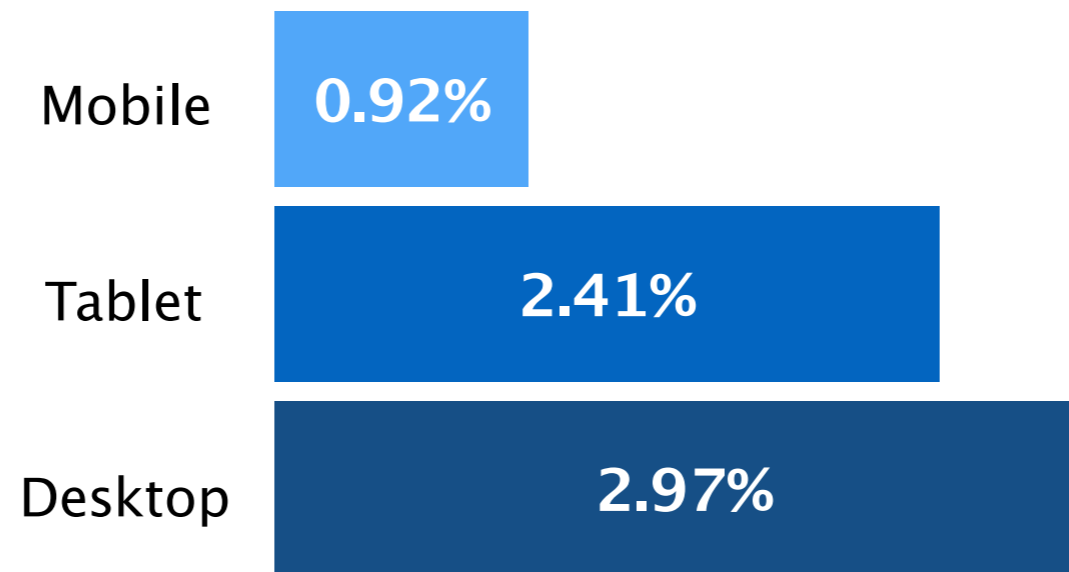
Share (%) of eCommerce site visits by device, 2012 - Q1 2014



Average Order Value



Conversion Rate



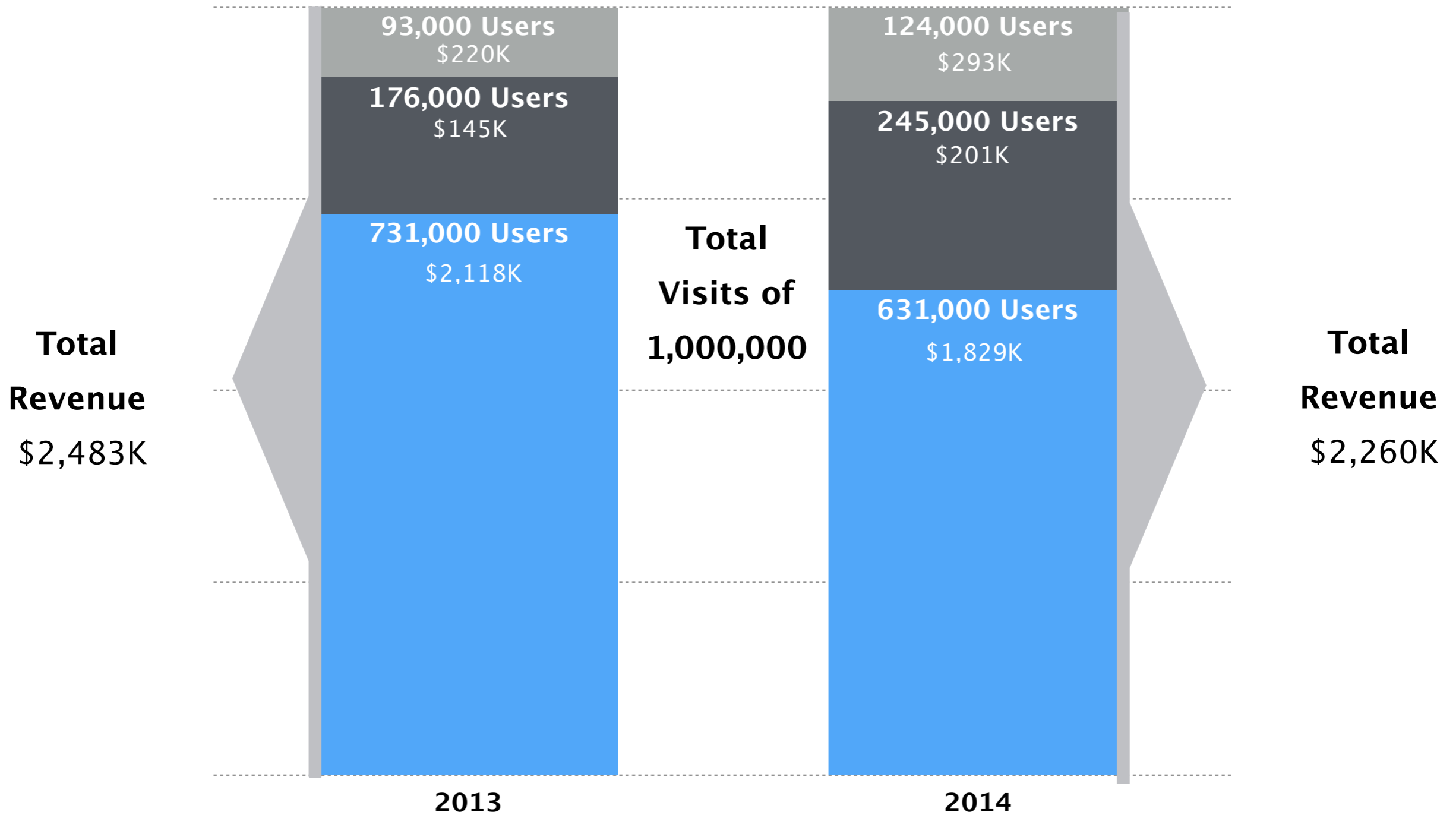
Impact of landscape revenue

■ **Desktop**
■ **Mobile**
■ **Tablet**

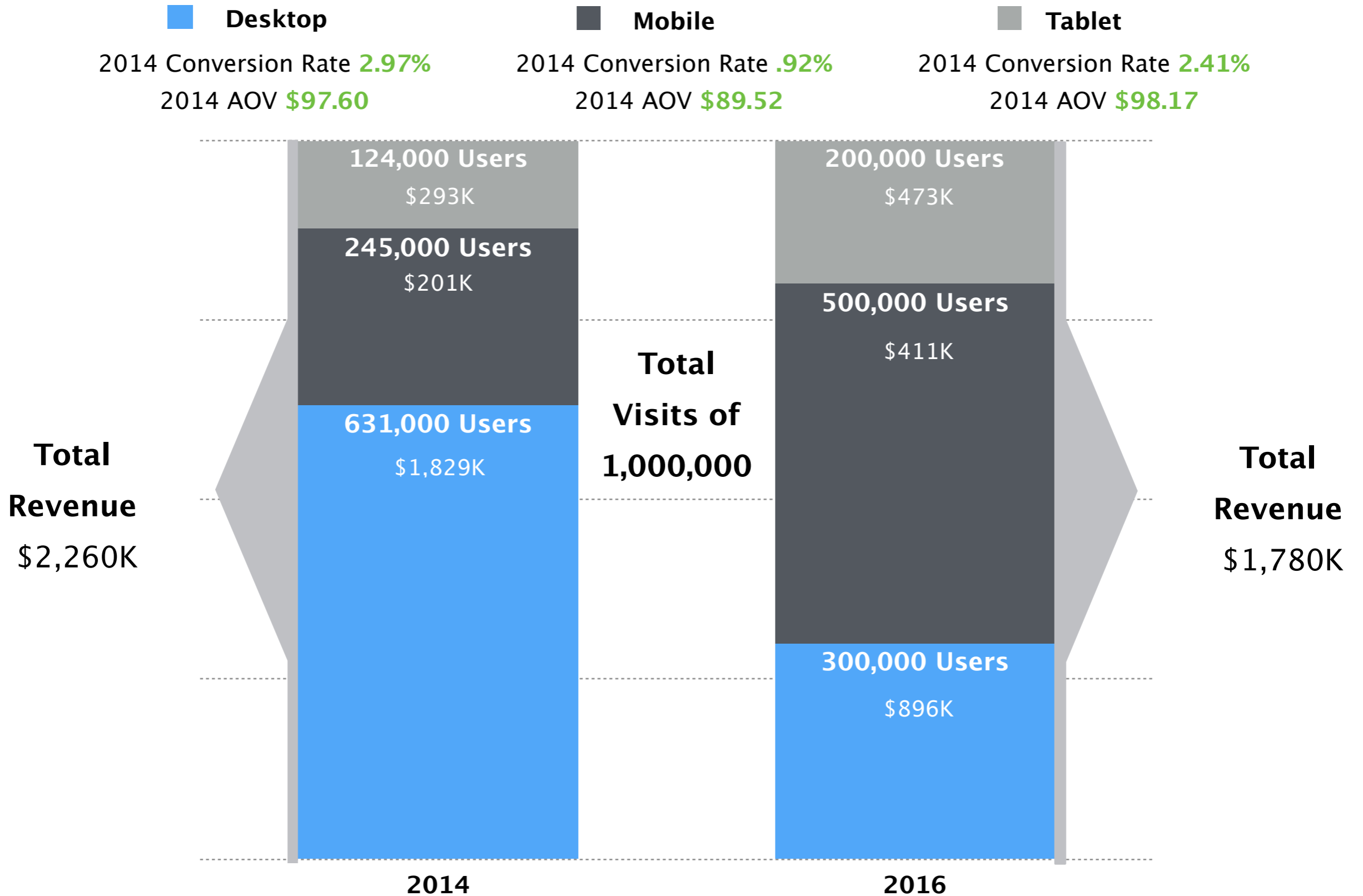
2014 Conversion Rate **2.97%**
 2014 AOV **\$97.60**

2014 Conversion Rate **.92%**
 2014 AOV **\$89.52**

2014 Conversion Rate **2.41%**
 2014 AOV **\$98.17**



Futurecasting impact on revenue

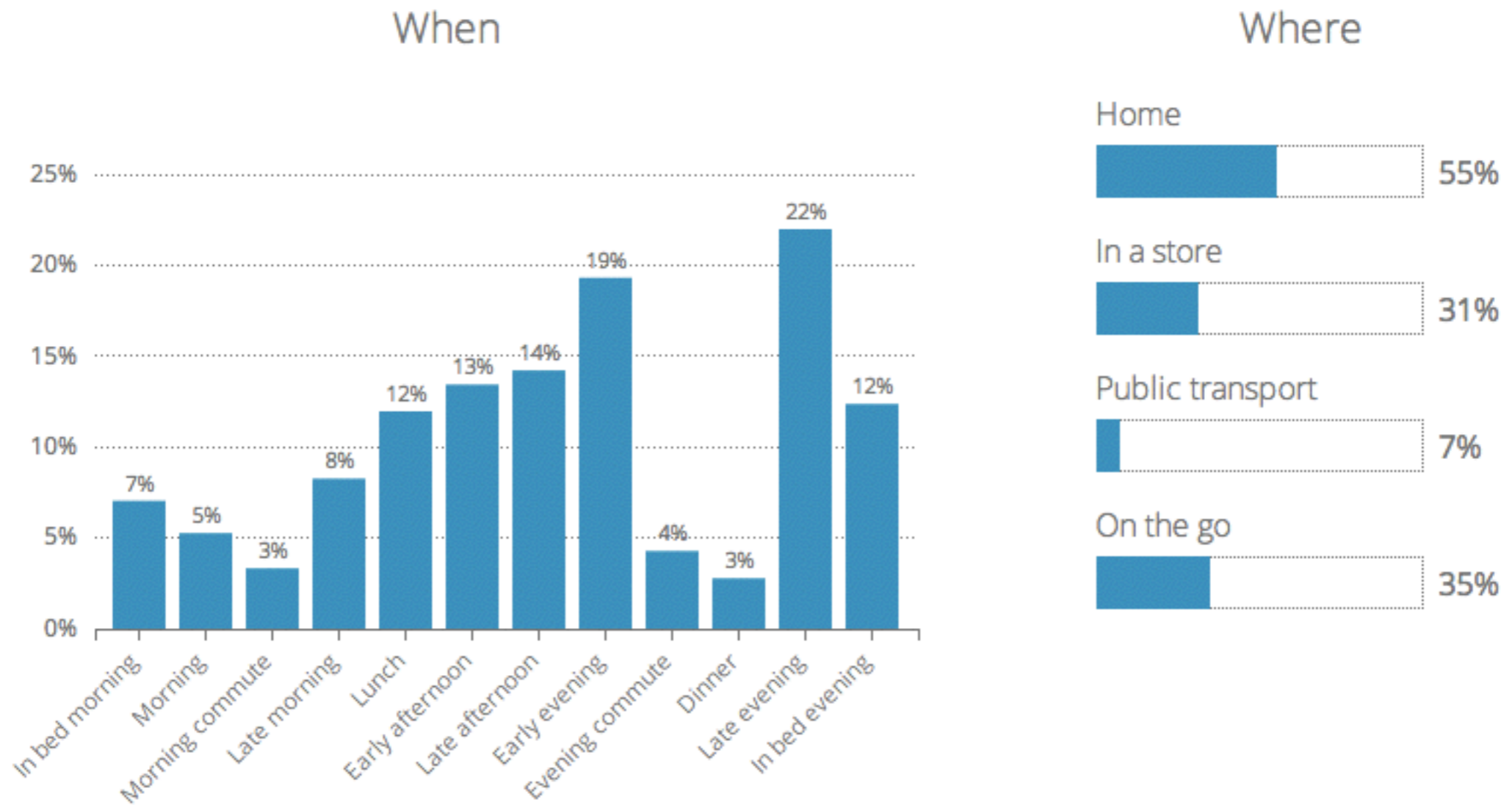


Mobile eCommerce is now a \$40 billion market; an increase from \$2 billion in 2010. It's likely that mCommerce will hit \$50 billion in sales in 2014.

How many smartphone users research or purchase products on their smartphone in general?

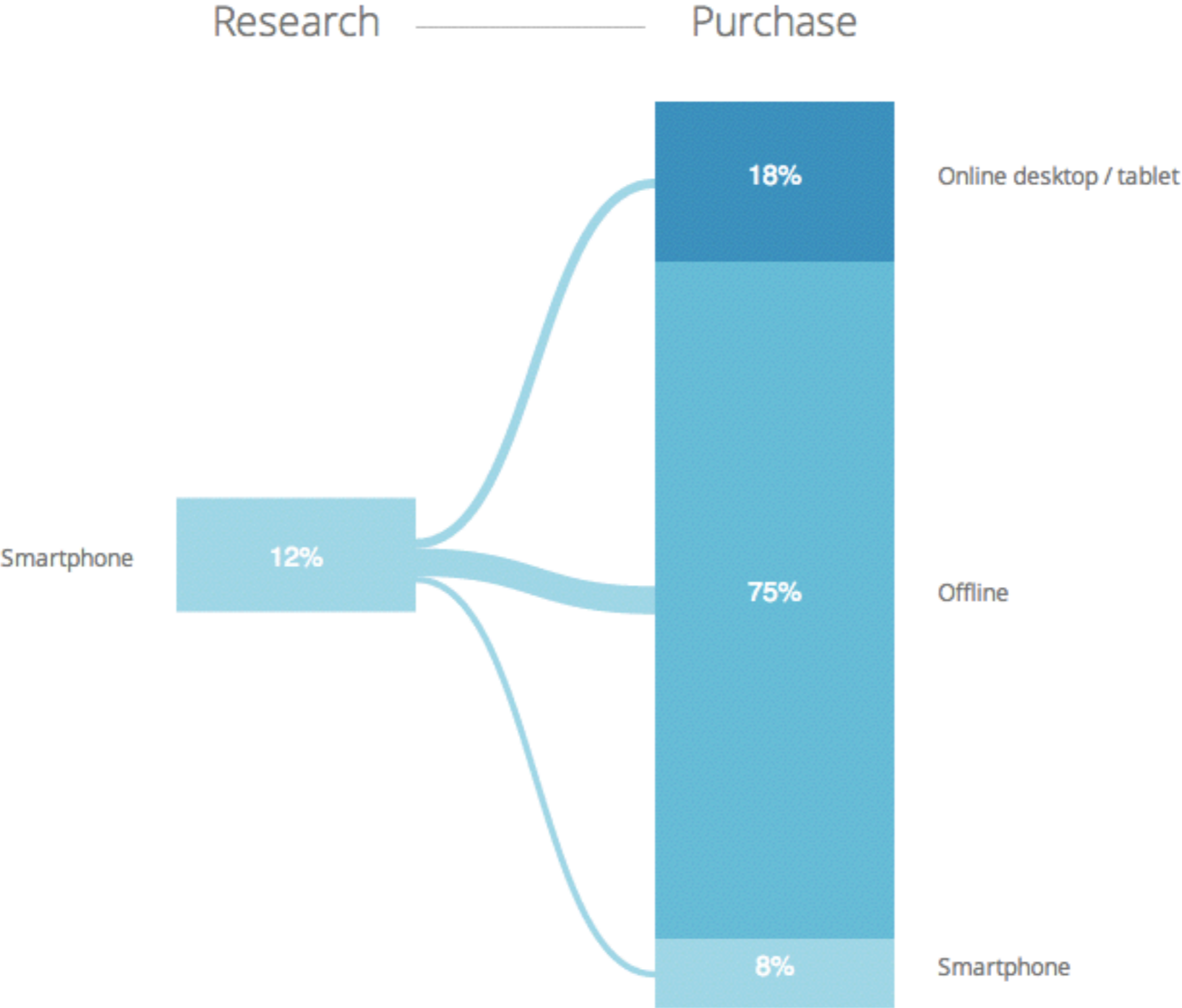


When and where do smartphone users use their smartphone to research or purchase products?

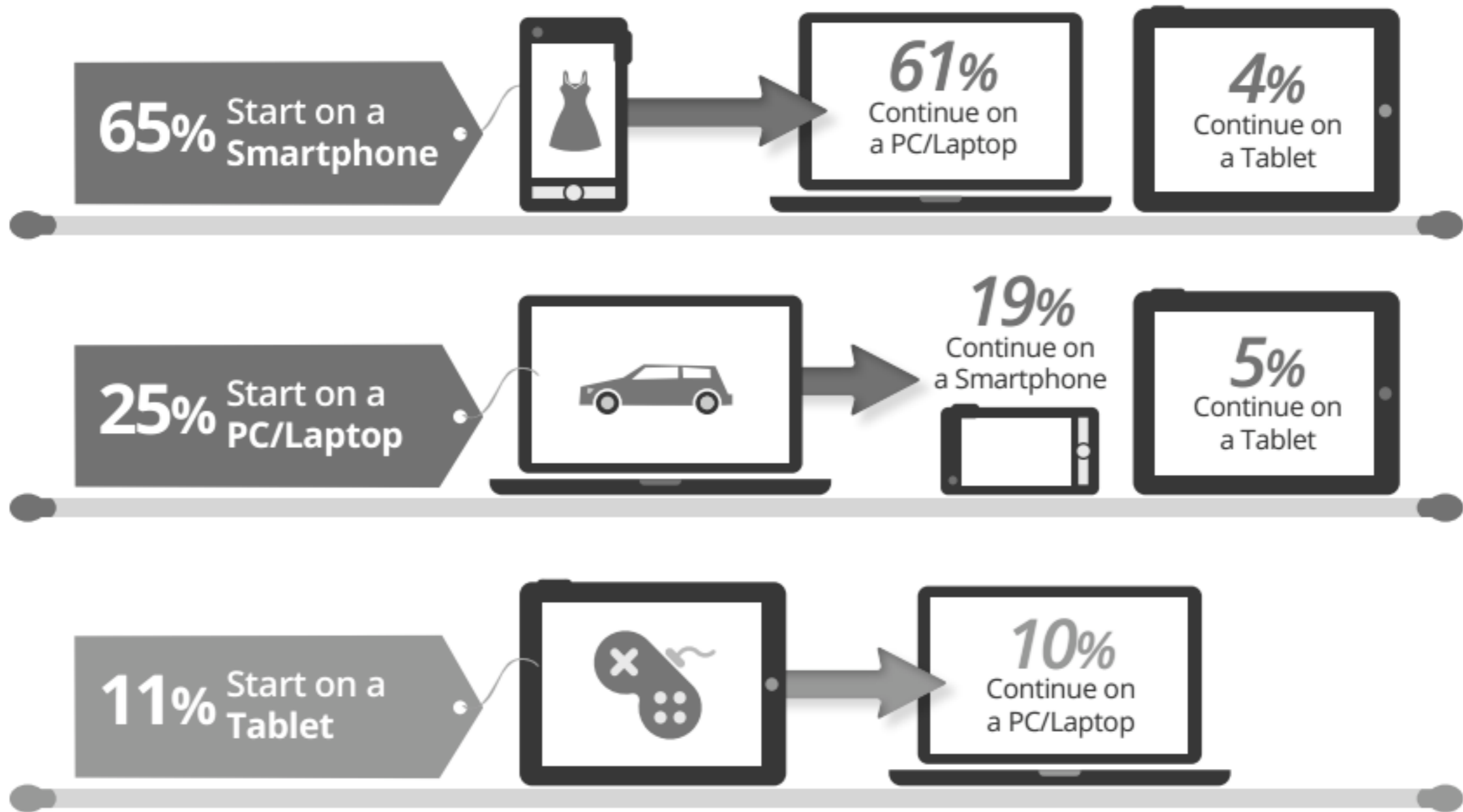


As of Q1 2014, just 12% of customers make purchases on more than one device type. However, these figures represent significant growth — at the beginning of 2012, only 4% of shoppers had made purchases on more than one device type.

Following a research on a smartphone, where is a retail product purchased?

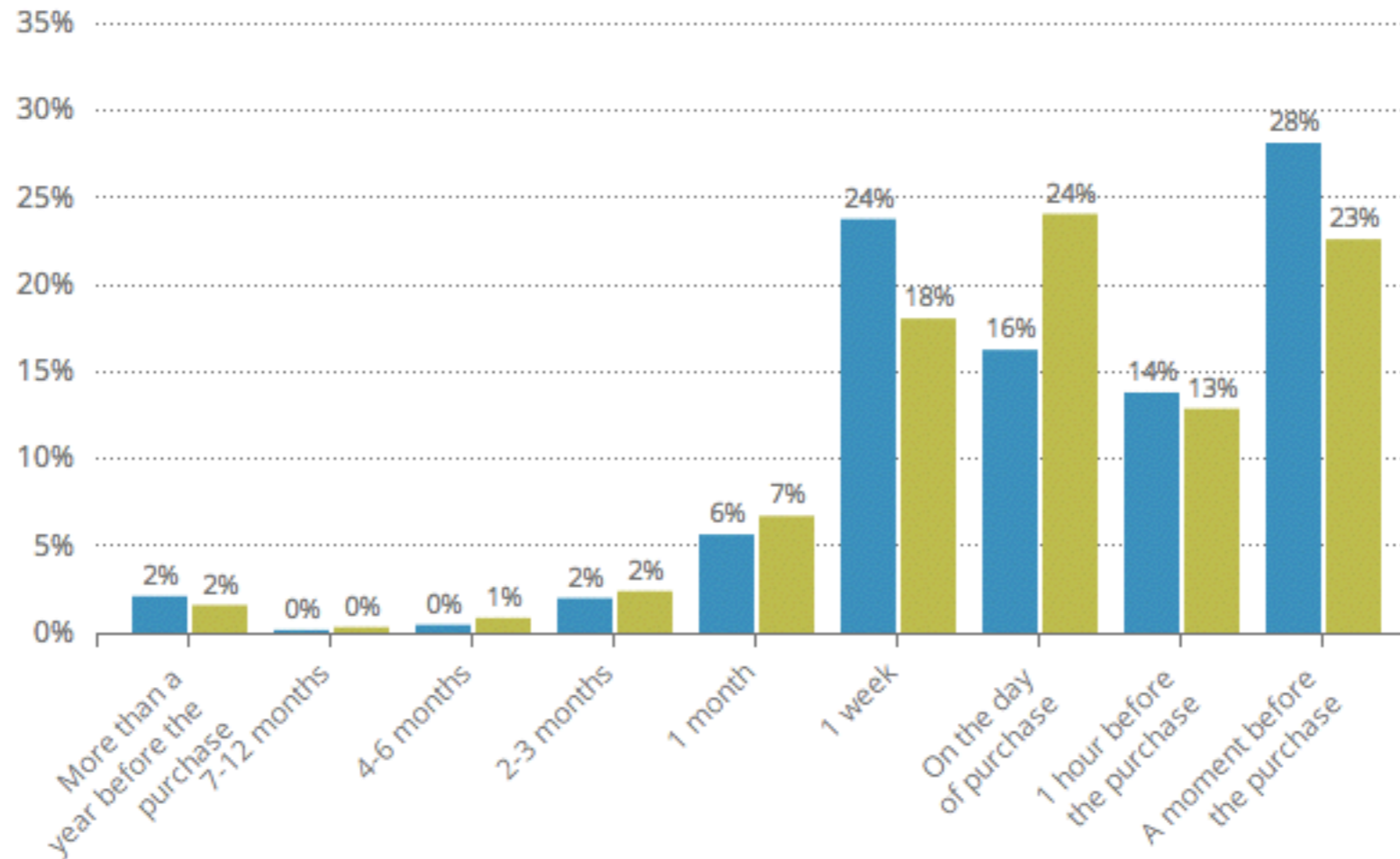


Consumers take a multi-device path to purchase



When does the customer journey take place?

Impulse or planned purchase? When did they start researching for a retail product?

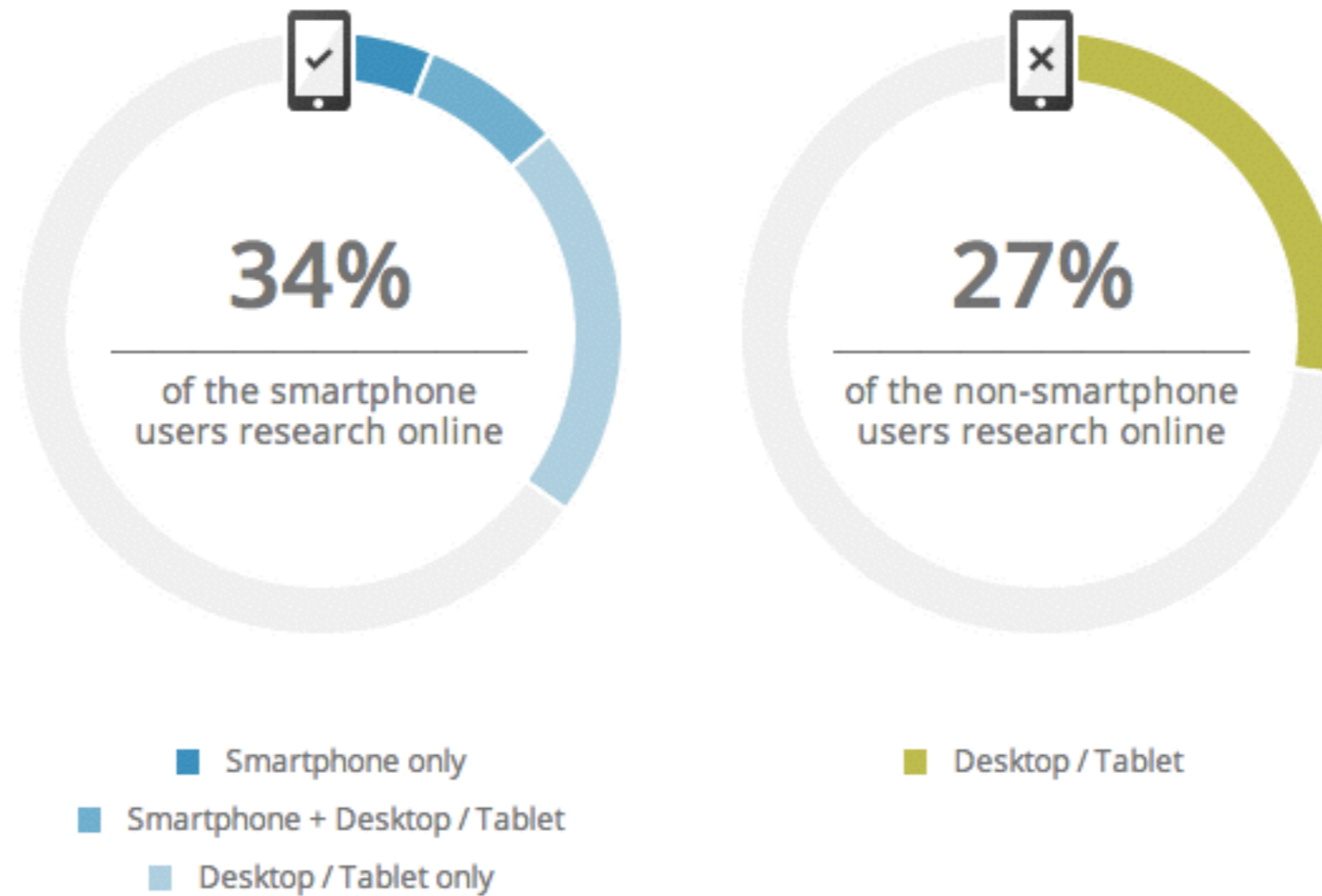


■ Smartphone users ■ Non-smartphone users

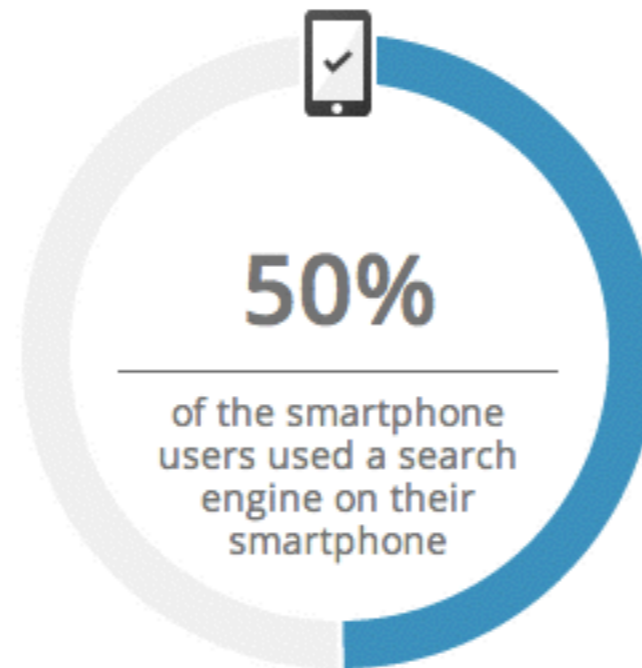
Where is the customer journey taking place?

Online vs. offline: where do they research for information on a retail product?

Online research



How many smartphone users use a search engine to research for a retail product on their smartphone?

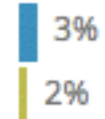


What sources of information are used when researching for a retail product?

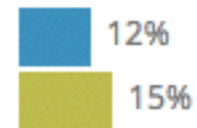
Stimulus

First inspiration or advertising

Online ads



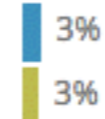
Offline ads



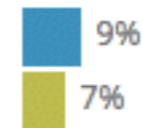
ZMOT Zero Moment Of Truth

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

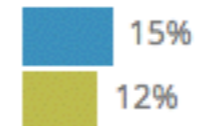
Social networks



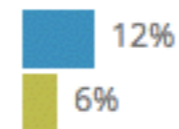
Reviews / blog



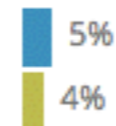
Websites



Search engines



Location search



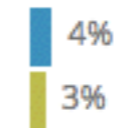
FMOT First Moment Of Truth

First interaction between a shopper and a product / service

In-store experience



Customer service

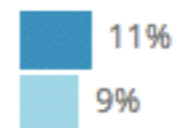


What about smartphone users? On which device do they research online for a retail product?

Stimulus

First inspiration or advertising

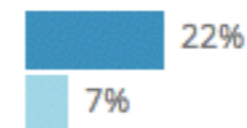
Online ads



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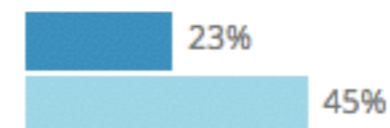
Social networks



Reviews / blog



Websites



Search engines



Location search



eCommerce 2013

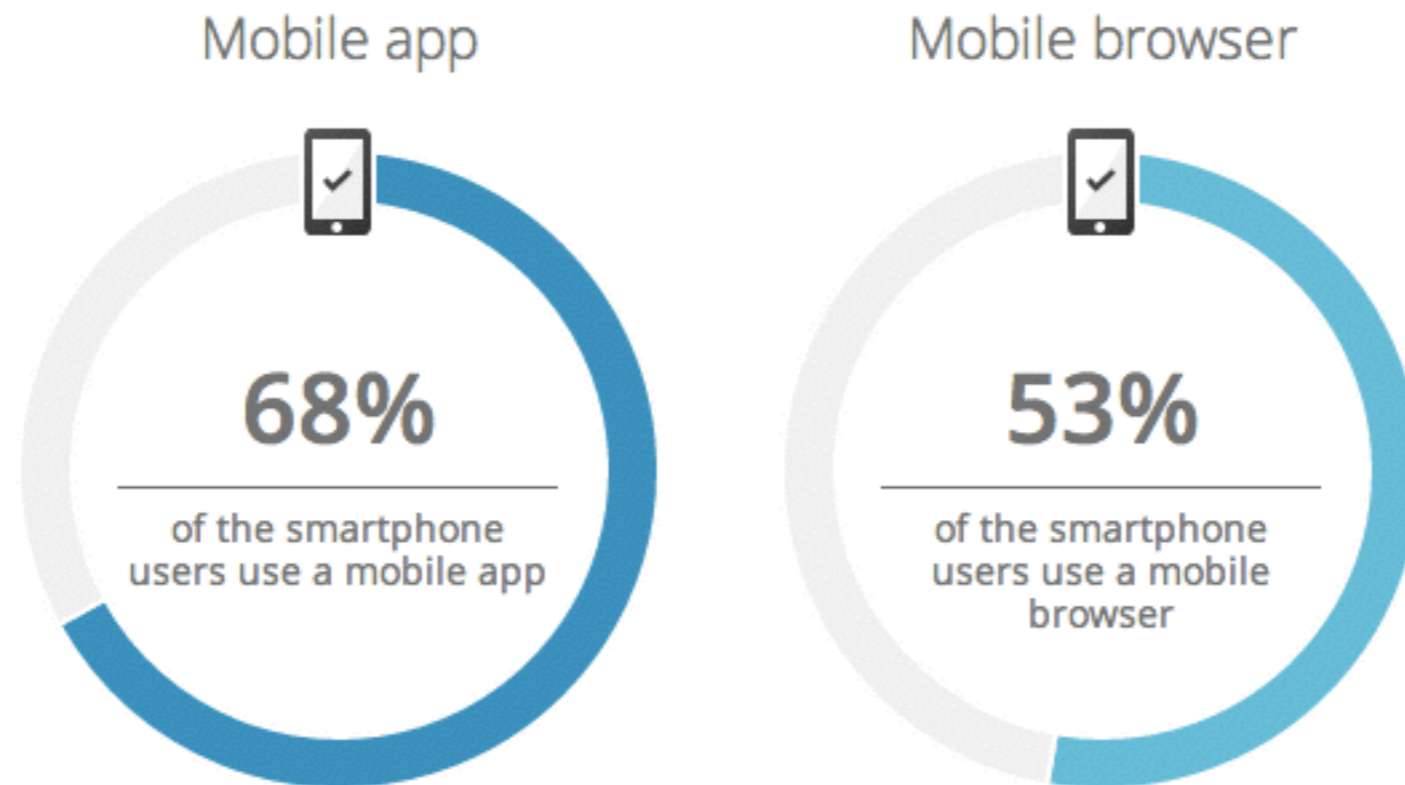
Share of revenue by channel and platform

| CATEGORY | SHARE (%) OF CATEGORY | | |
|-------------------|-----------------------|-------------|-------------|
| | DESKTOP | PHONE | TABLET |
| | 100% | 100% | 100% |
| AFFILIATE | 1.15 | 0.6 | 1.3 |
| PAID SEARCH (SEM) | 18 | 13.35 | 24.8 |
| ▶ DIRECT | 21.3 | 32.9 | 22.5 |
| DISPLAY | 1.15 | 0.35 | 0.4 |
| ▶ EMAIL | 20.9 | 26.7 | 23.1 |
| ORGANIC SEARCH | 23.5 | 16.0 | 15.4 |
| REFERRAL | 13.7 | 9.5 | 12.3 |
| SOCIAL | 0.3 | 0.6 | 0.2 |
| TOTAL | 100% | 100% | 100% |

CUSTORA E-COMMERCE PULSE _ MOBILE REPORT

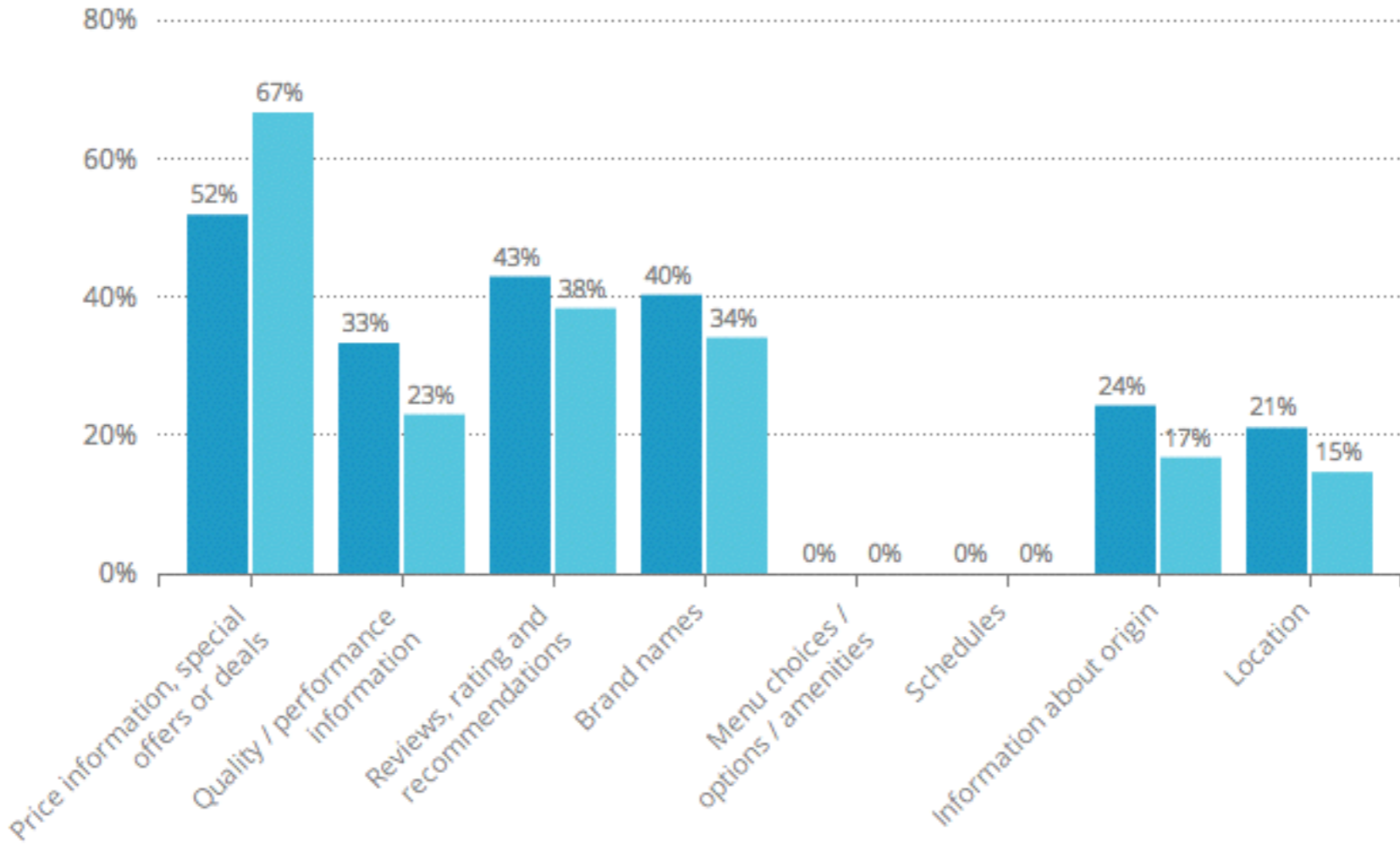
**App vs. Browser:
What's more important in a customer
journey?**

App vs. Browser: Which one is used the most when researching for a retail product?



What do customers research during their journey?

What type of information do smartphone users look for on their devices when researching for a retail product?

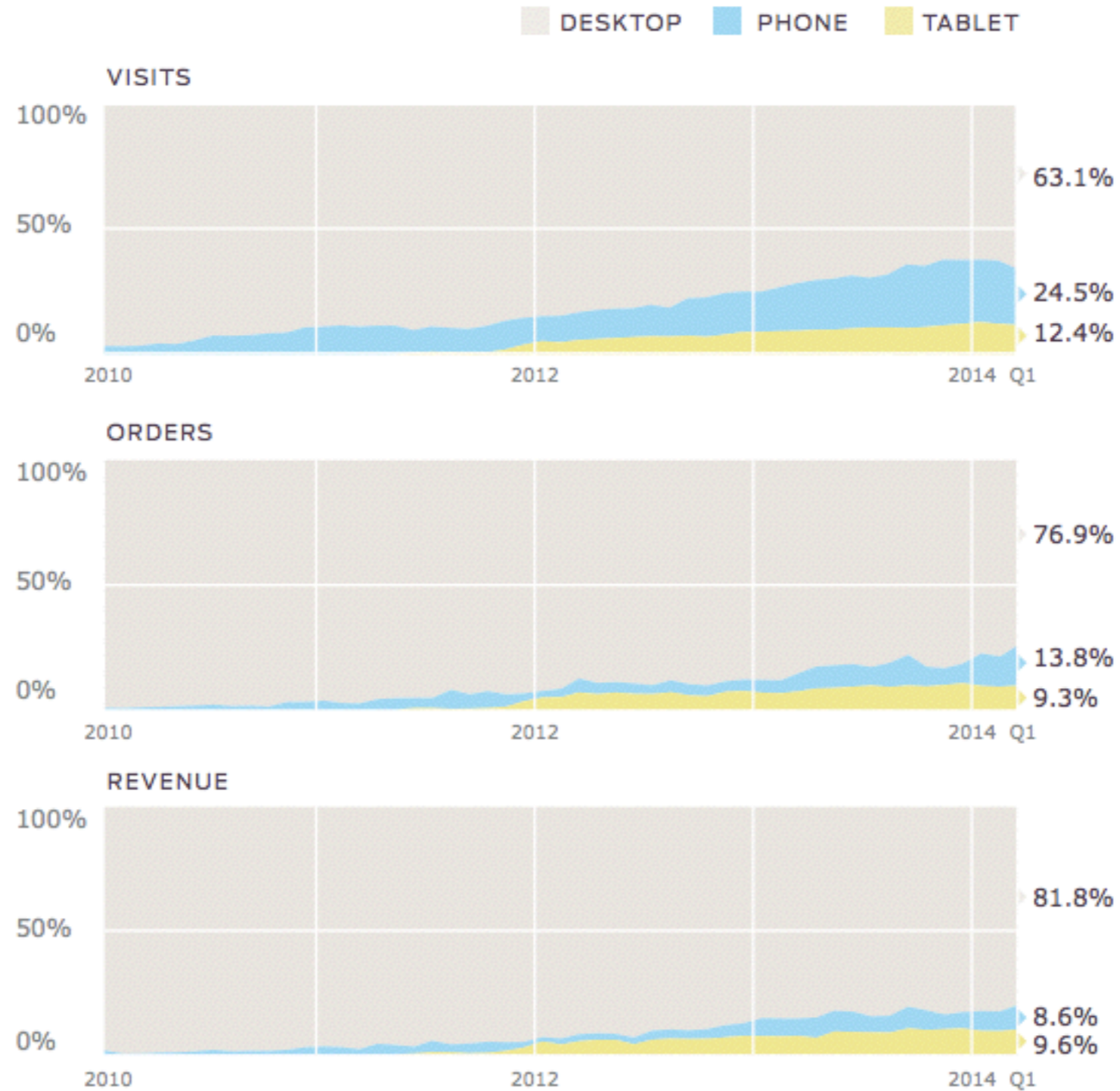


■ Smartphone ■ Desktop / tablet

**What challenges are brands
and marketers running into?**

Mobile devices drive site traffic, but shoppers mostly purchase on desktops. We see conversion rates on mobile roughly 1/3 of desktop conversion rates.

eCommerce share (%) of site visits, orders, and revenue 2010 - Q1 2014

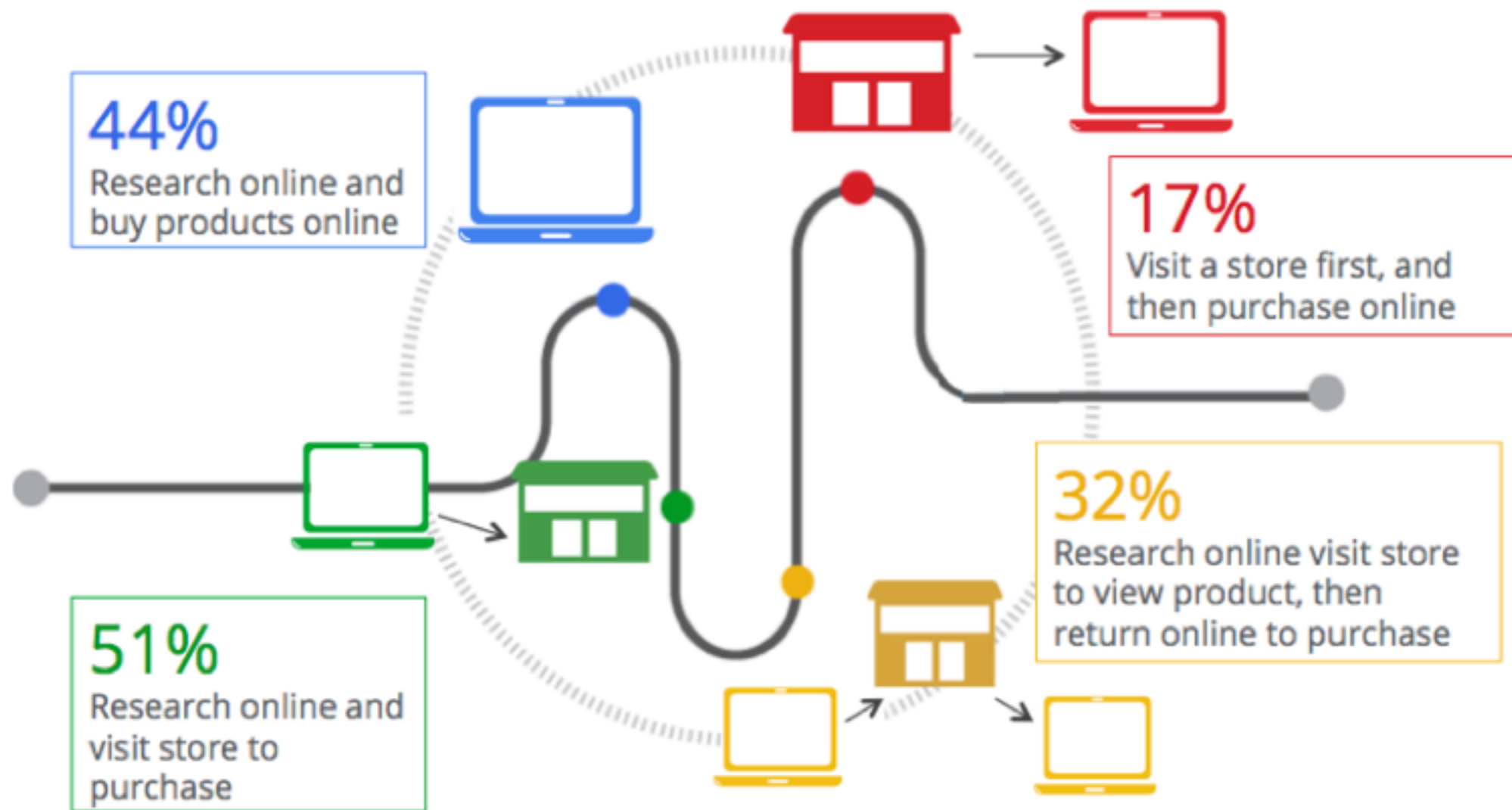


Mobile orders are smaller, while tablet orders keep pace with desktop.

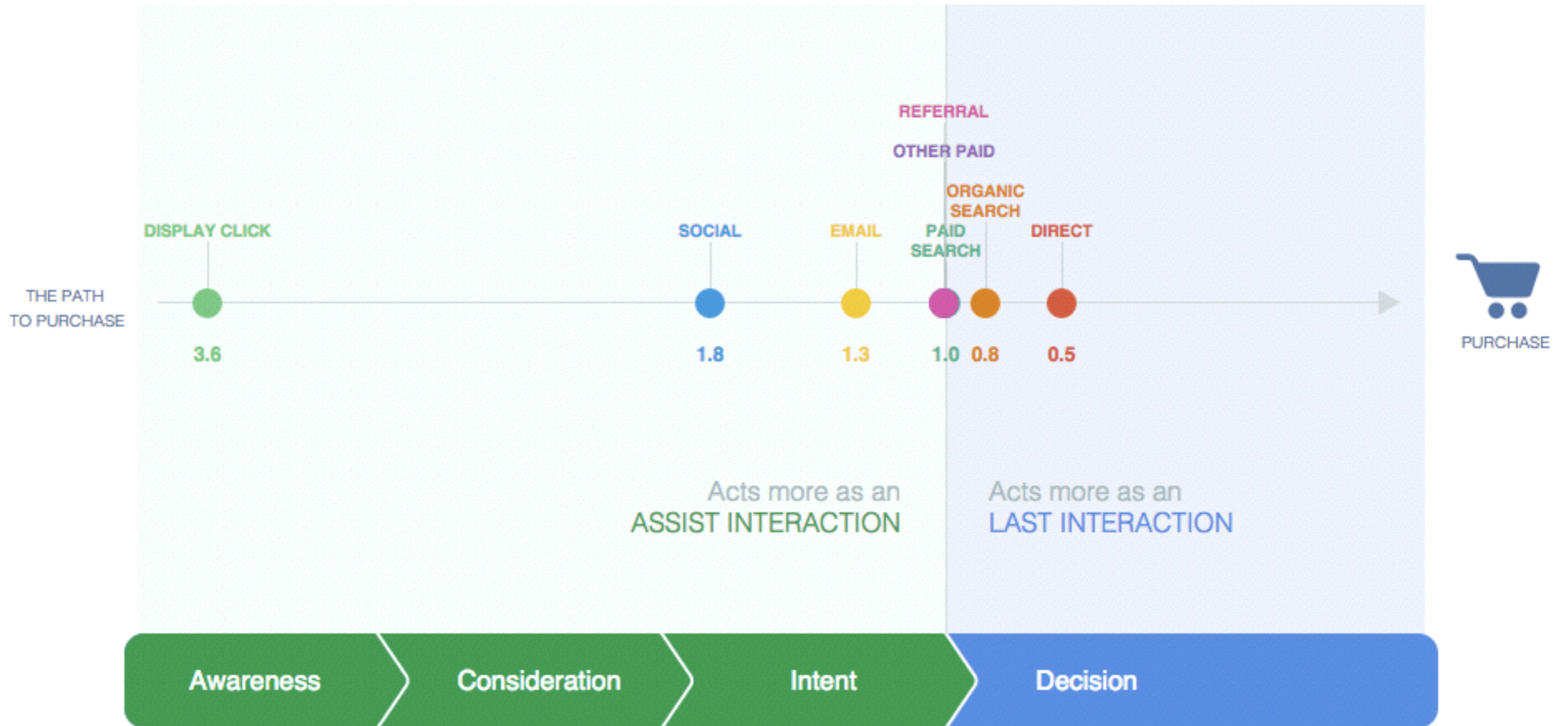
**How do we optimize the customer
journey?**

“Half the money I spend on advertising is wasted; the trouble is I don't know which half.” – John Wanamaker

Lines between offline and online shopping experiences are blurring

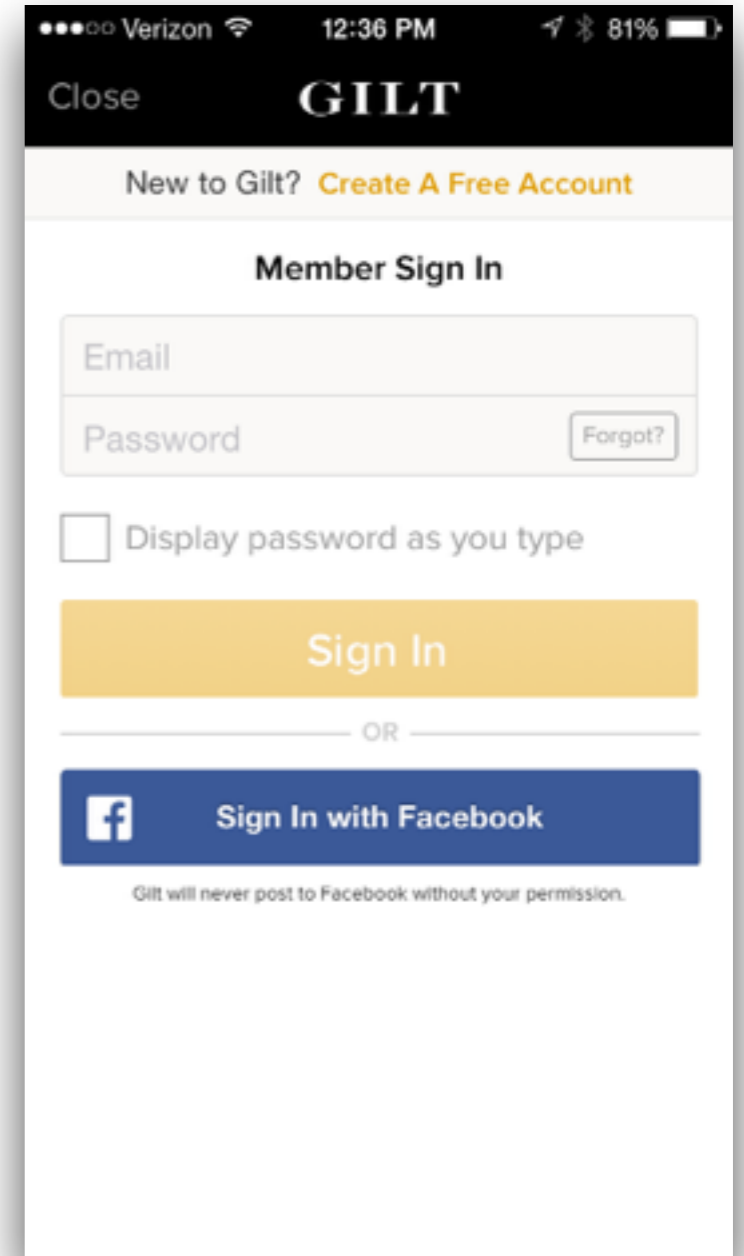
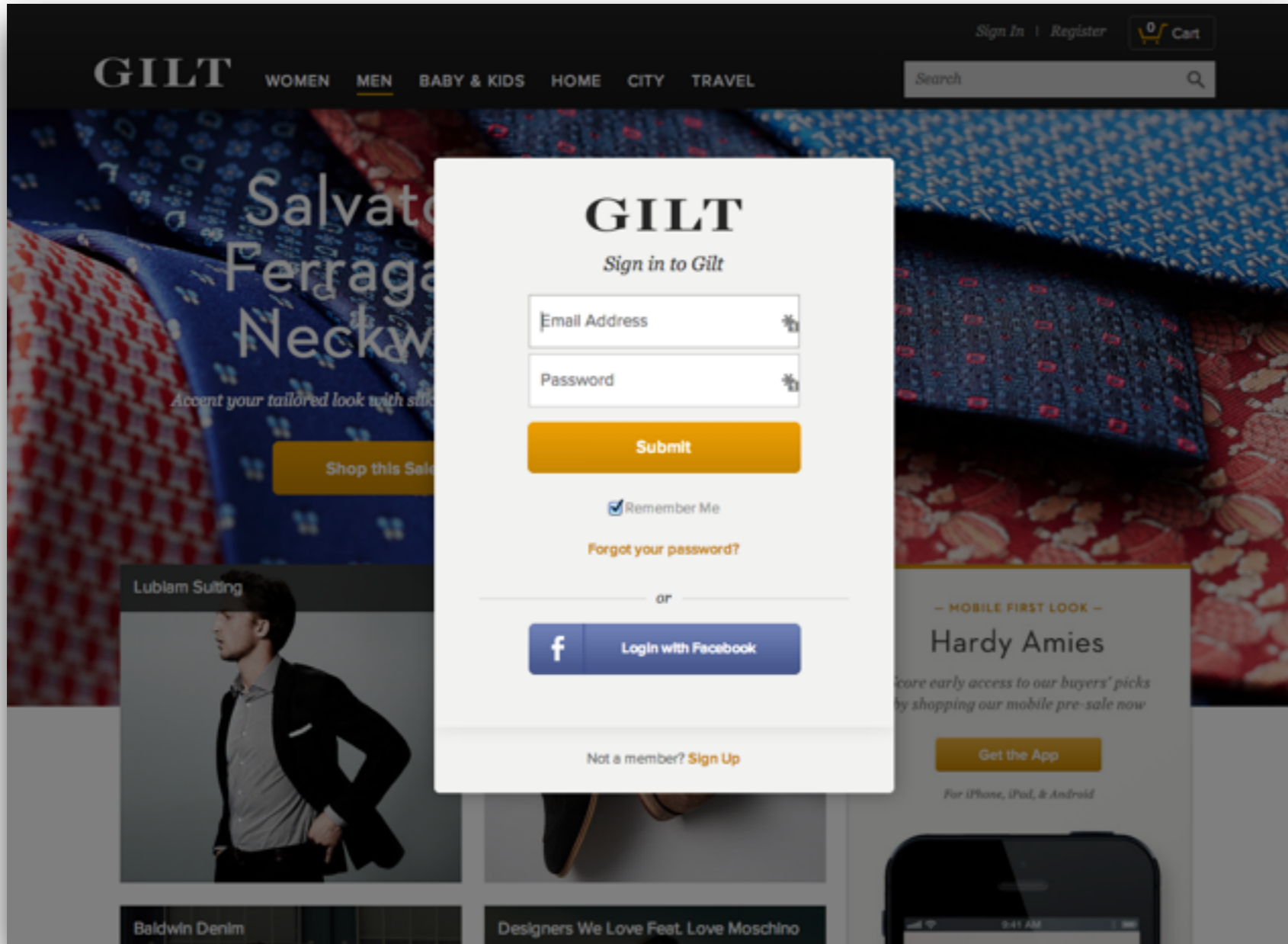


Outside of cross-device attribution, marketers have to contend with cross-channel attribution



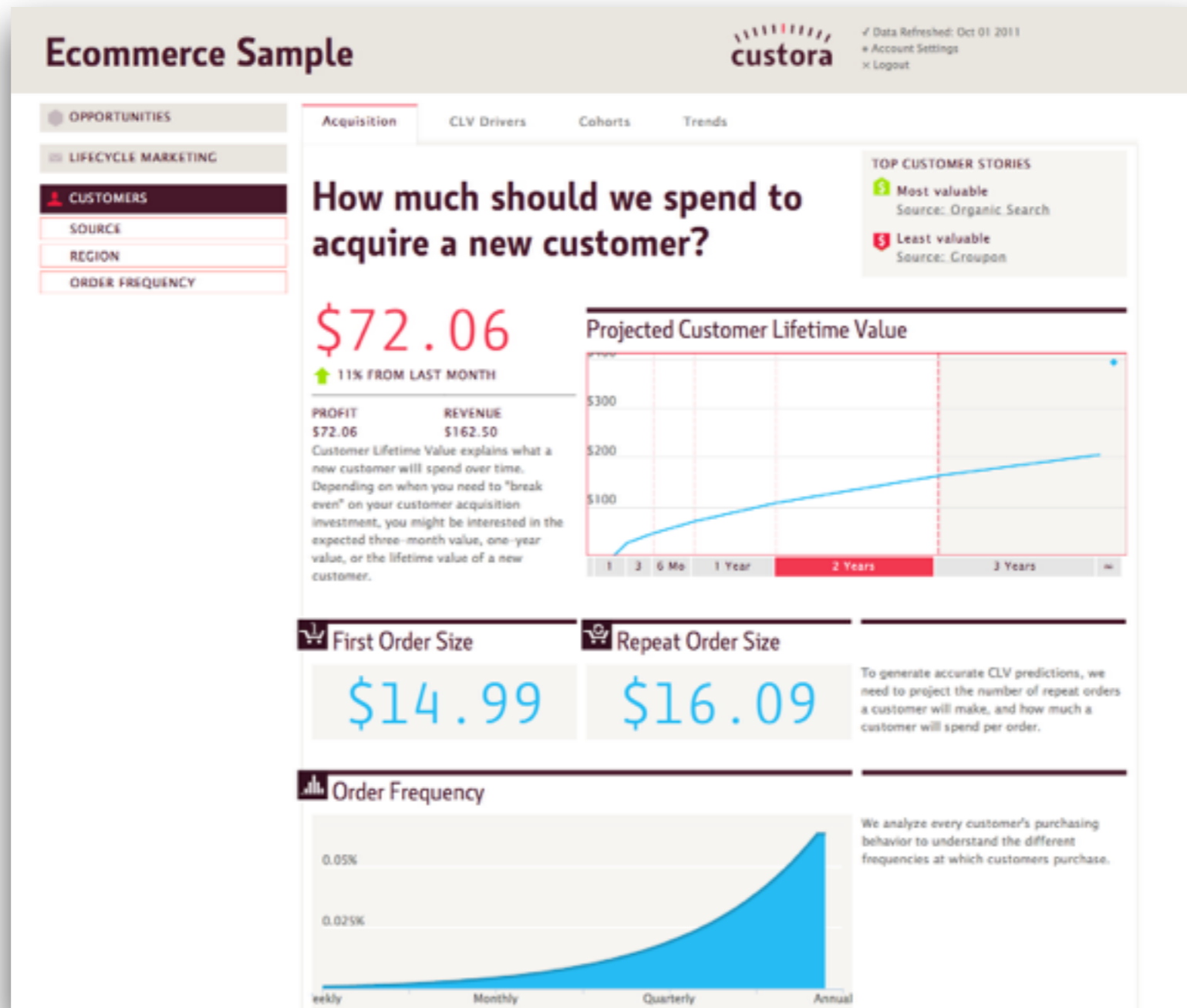
Email

Cross-device and channel tracking require consistent email address or login capture.



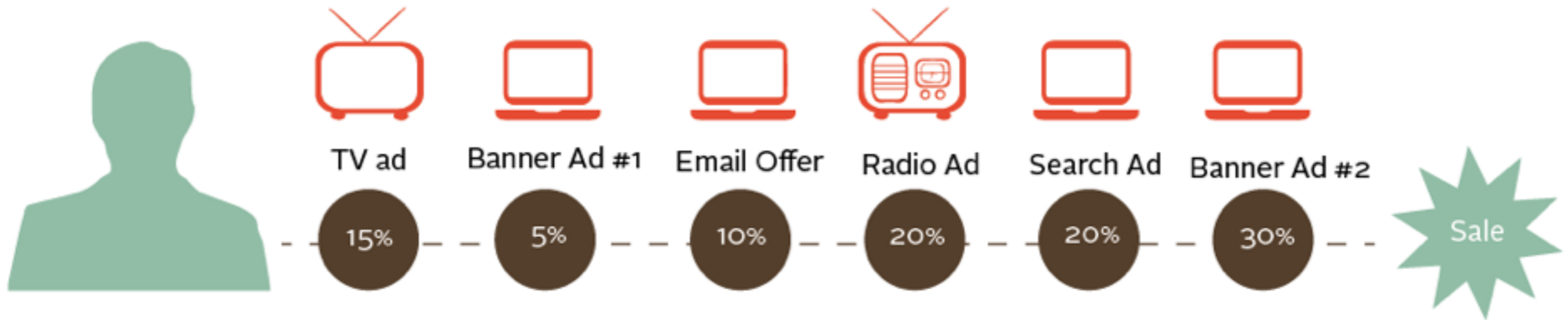
Business intelligence

Use services like Custora and RJMetrics to understand customer lifetime value and optimize against valuable customers across channels.



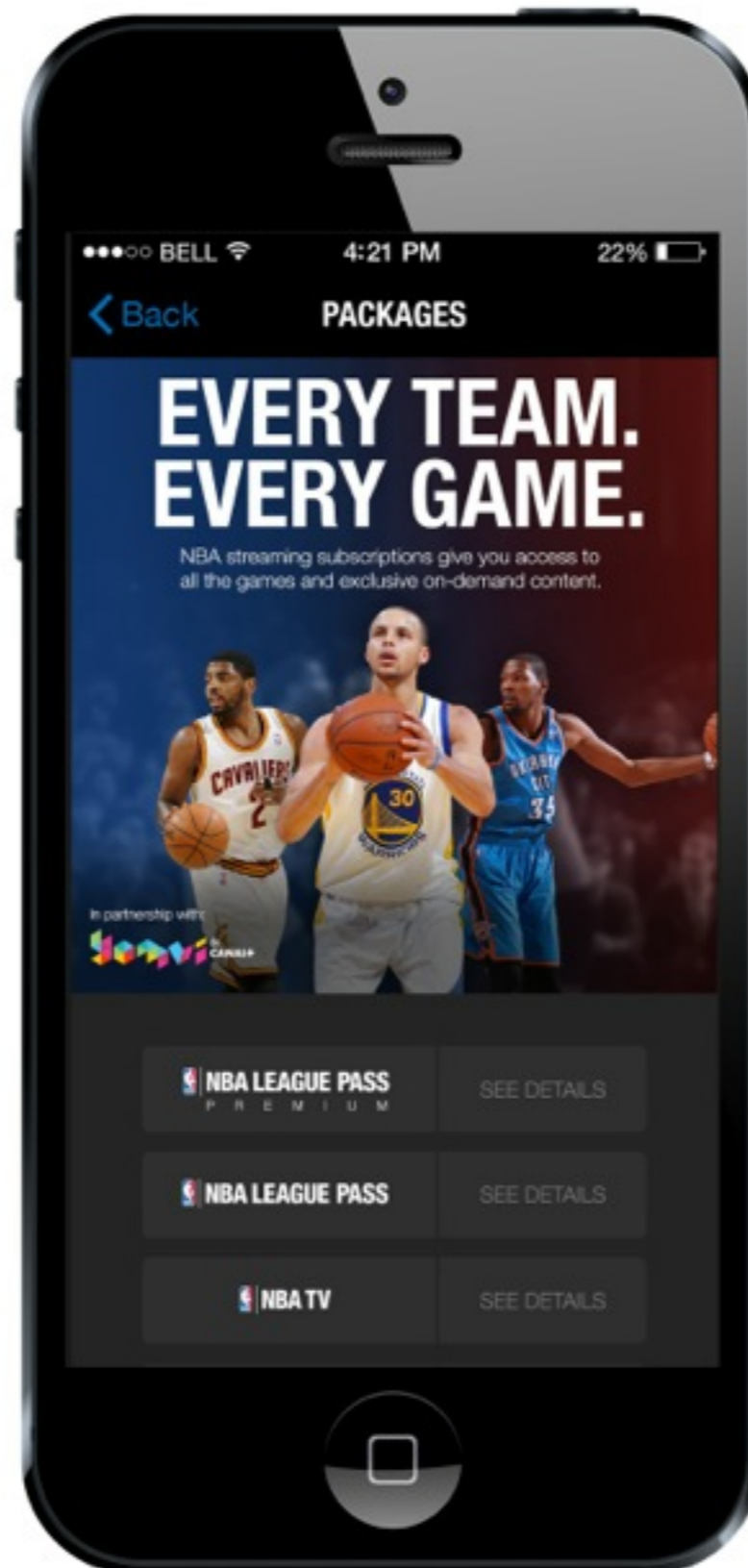
Model attribution

Just say “no” to last click attribution. As 75% of purchases require multiple touch points, assigning credit to the last touch point shows an inaccurate picture.

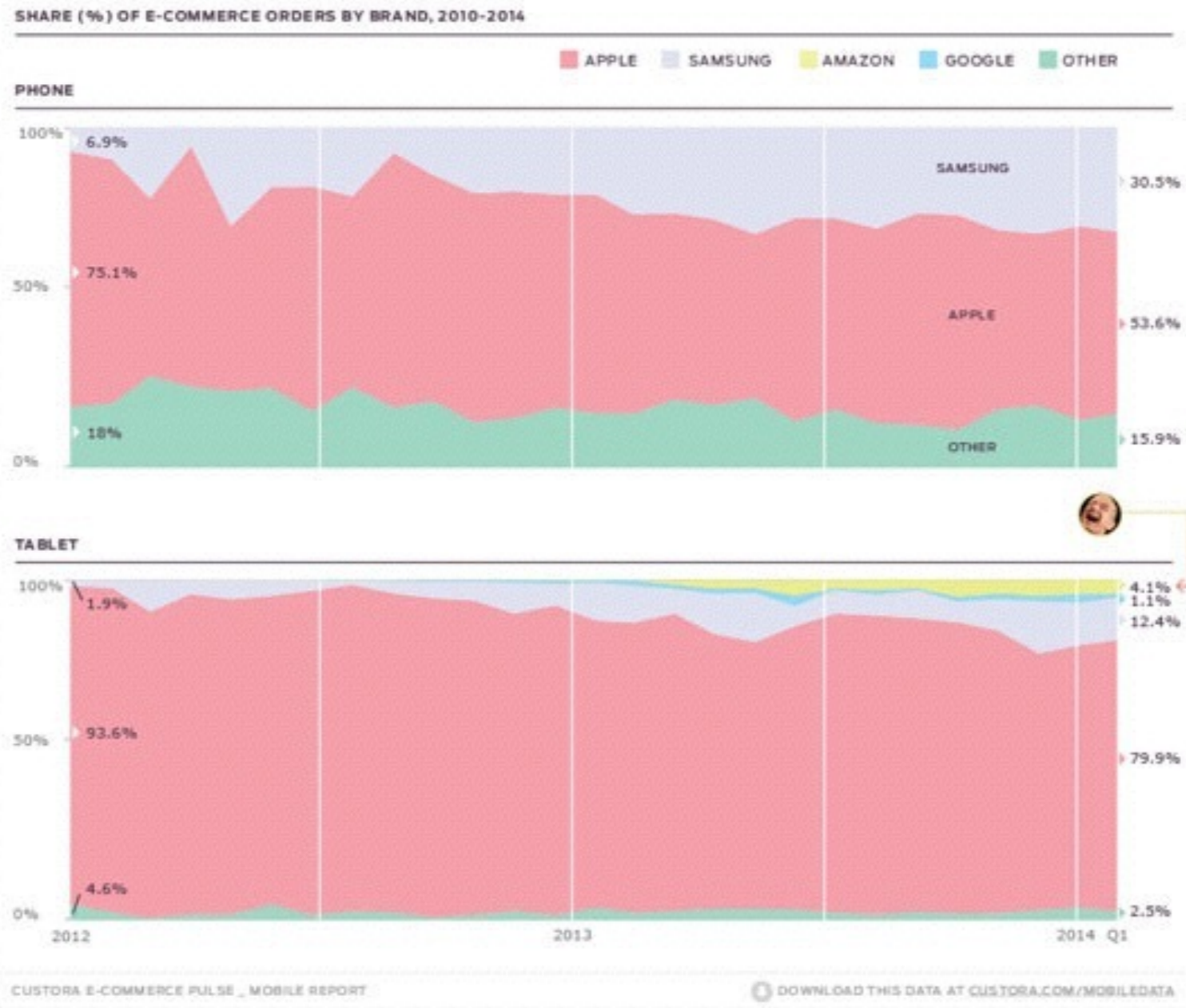


Mobile first

It forces you to streamline content and be concise in your messaging and CTAs.



If you must purchase mobile traffic, prioritize Apple over others



Remarket to a Mobile Consumer

If a user comes from mobile and abandons his or her customer journey, have a mechanism in place for re-marketing.

Crate&Barrel


View with images

What's New | Furniture | Dining & Entertaining | Kitchen & Food | Decorating & Accessories | Sale

We've saved your items for you.

You put some great items in your cart but left before checking out. We'll save them for a limited time.

[Complete your order ▶](#)



Isaac Charcoal Full Bed

We're here to help. Call Customer Service 24/7 at **800.967.6696**.

Secure Checkout
Shopping is always safe and secure.

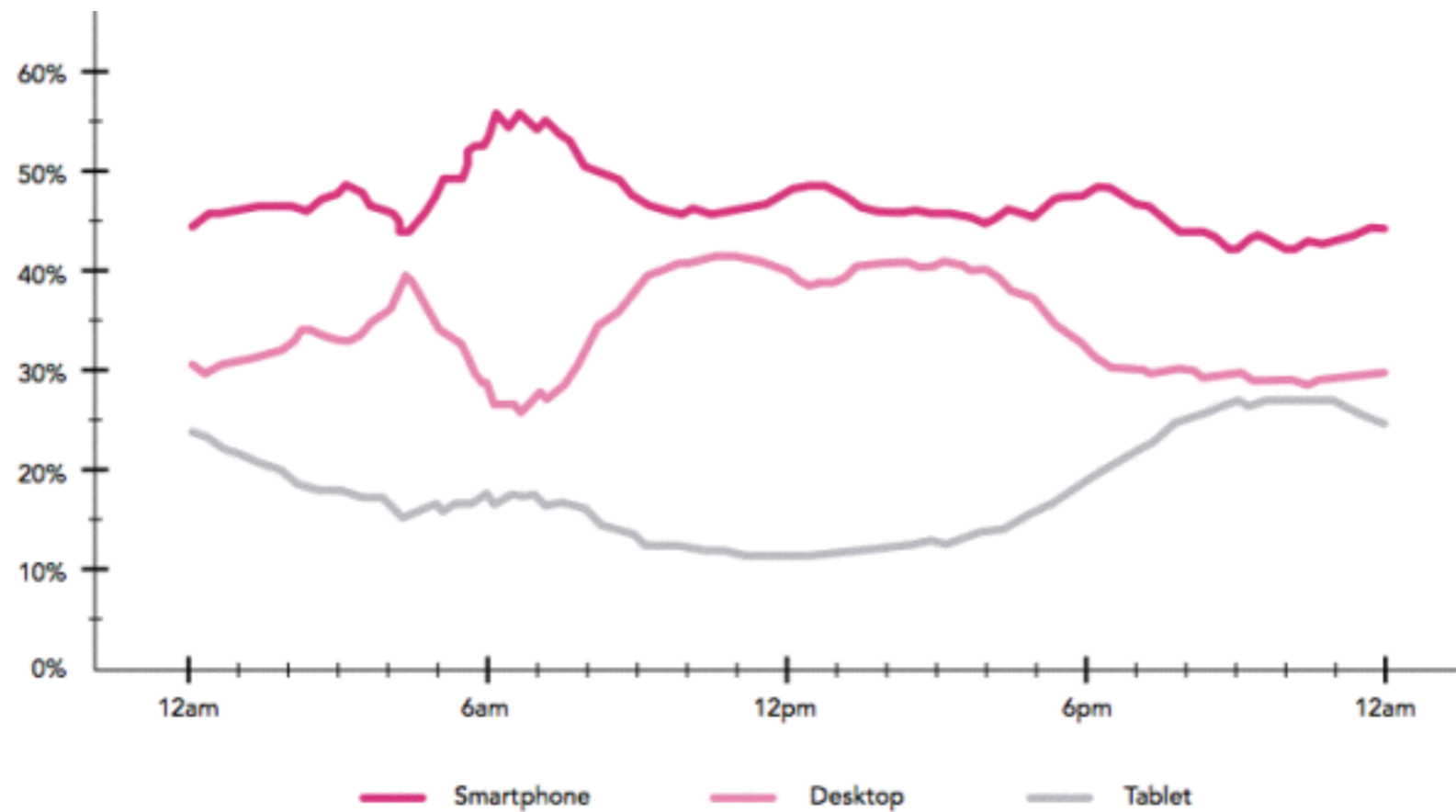
Easy Returns
See our [returns and exchanges policy](#).

Free Shipping on more than 400 items

Get free shipping on more than 400 full-price items, including kitchen electrics and appliances, cookware, cutlery, flatware, bedding and curtains.* [Shop Free Shipping ▶](#)

Convert a Desktop Consumer

If it's an email program, find out when they are most likely to open that email via desktop and resend the email at that point.



Seed social content to Desktop Viewers or Provide a Mobile Friendly Social Experience


If it's a social post, seed content to desktop viewers.

AD PREVIEW AND PLACEMENTS

✓ Desktop News Feed Remove

P Perfumania Like Page
Sponsored

Save up to 70% off top designer brands when you shop at Perfumania.



Women's Perfume - Men's

PERFUMANIA.COM Shop Now

Questions

?

Sources

- Google Think. Mobile in the Purchase Journey
<http://think.withgoogle.com/mobile-purchase-journey/#/?lang=en>
- Custora E-Commerce Pulse
<http://blog.custora.com/2014/07/custora-pulse-mobile-report/>
- RSR Google Analytics (select clients)