How do people shop using multiple devices?

An IMRG report (non-member executive summary)

Analysing the relationship between mobile, desktop and tablet traffic and conversion – how customers use different devices, when and why

September 2016

How multichannel are we?

It's no secret that many shoppers are 'multichannel' these days. Smartphones have achieved a strong penetration into the UK population and are increasingly used for managing our entire lives. Many people either have a tablet or have access to a 'family' one. And desktops still account for a sizeable chunk of sales for online retailers.

Also – there are shops.

According to a recent Bronto survey[1], the average UK shopper owns 2.7 devices for accessing the web. The perennial problem for retailers is understanding how customer journeys are played out across these devices – what role does each play in any given situation? Just because someone purchases in a store, did they research on a desktop, use a store locator on their smartphone then finally complete down their local high street?

The key question is the influence that each device can have on these journeys, as it affects attribution of the sale and can help to shape strategies – to ensure retailers don't look at hard data that only tells part of the story and end up focusing their energies in the wrong areas.

So what do we know about the relationship between mobile, desktop and tablet traffic and conversion? How do customers use different devices – when and why?

This is an executive summary of a report addressing some of these questions to help you understand trends in this area.

What does IMRG's data show?

Conversion rates

Over the past few years, we have tracked a general trend for rising conversion rates across devices. At the overall level, conversion rates increased by 20% between 2012 and 2015, a third on tablets and doubled on smartphones (starting from a lower base) over the same period.

Average basket values

While the overall online retail average basket value (ABV) is higher than the average spend recorded specifically on mobile devices, the overall trend line is similar across all devices. However, during H1 2016 we recorded an increase in ABVs across all devices, with the steepest rise seen on smartphones.
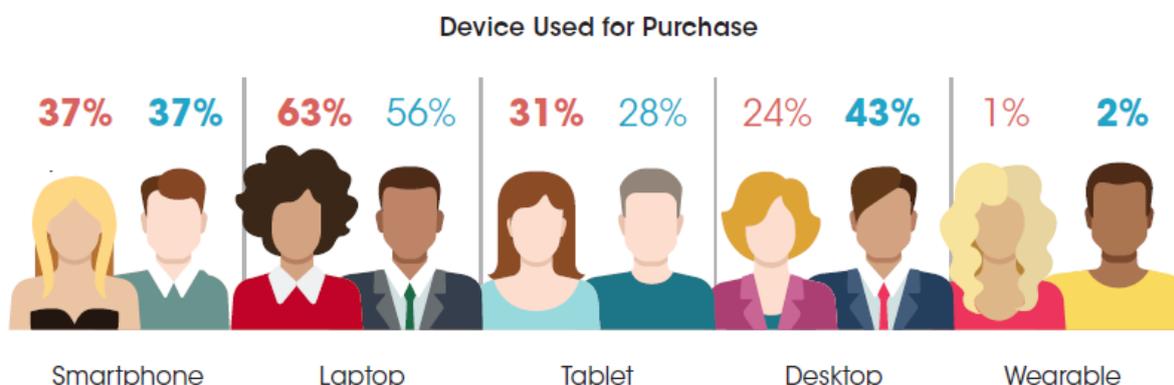
---

[1] Bronto, *The Influence of Multi-Device Ownership on Ecommerce*, April 2016

What do shoppers say?

According to the Bronto survey[3] mentioned in the introduction, 82% of the population now own a smartphone – a survey we ran with eDR in 2015[4] tracked it at 75% – with 78% having access to a laptop and 60% to a tablet. It further found that desktops are still used by nearly half the population (46%).

Device Used for Purchase

Smartphone		Laptop		Tablet		Desktop		Wearable	
37%	37%	63%	56%	31%	28%	24%	43%	1%	2%

Another interesting finding from our survey with eDR is that 49% of those who owned multiple devices (a smartphone and at least one other internet-connected device) claim they use the device most convenient to them when making a purchase.

A Tradedoubler survey[5] provides a number of useful UK-specific metrics that are relevant to this report:

- *47% of purchases that finish on either a smartphone, desktop / laptop or tablet start on a different device*
- *50% who make purchases on a desktop / laptop research on a smartphone or tablet first*
- *85% claim researching and buying online is more convenient than going to a physical store, but 39% claim that they only buy low-value items online*
- *43% use their smartphone to research but rarely or never make a purchase on it*
- *48% use their smartphone to research products while out shopping*
- *33% are making more purchases on their smartphone than they did a year ago*

---

[2] Pitney Bowes, *UK eCommerce Mobile Assessment (Q2 2016 data)*, July 2016

[3] Bronto, *The Influence of Multi-Device Ownership on Ecommerce*, April 2016

[4] IMRG / eDR, *Customer behaviour report 2015*, December 2015

[5] Tradedoubler, *Digital Connections Study*, March 2016

IMRG © - September 2016

Communicating with customers

Switching the focus from preferred device to preferred communication channels for a moment, the below chart shows the results of an OpenMarket[6] survey where they asked shoppers to rate the channels through which they prefer to be contacted by retailers:

Which are your preferred means of communicating with retailers?
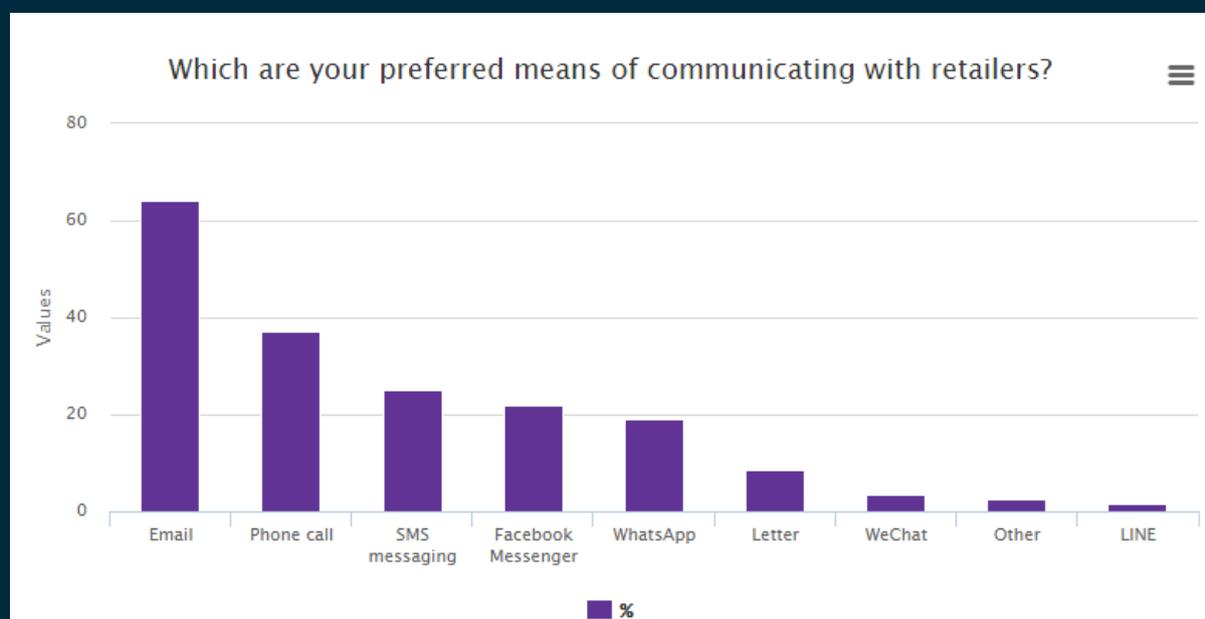
Cross-device purchasing

Data from Demandware[7] shows that smartphones are dominant in terms of traffic share during weekday nights and throughout the weekend, although if we look at the share of orders then desktops / laptops are still the key device of choice, particularly during business hours with a peak at lunchtime.

Multi-device influence

When it comes to actually completing a transaction, Demandware's data from Q2 2016 suggests that the majority of people making multiple purchases regularly stick to a preferred device. Furthermore, Q1 2016 (global) data from Monetate[8] found that the first device used as part of a purchase journey is often also used to complete the purchase.

---

[6] OpenMarket, *Five mobile communication channels digital natives crave*, July 2016
[7] Demandware, *Demandware Shopping Index*, June 2016
[8] Monetate, *Monetate Ecommerce Quarterly Report – Q1 2016*, March 2016

Looking at device types individually (from Monetate's data):

- When browsing starts on desktop, 90% complete the purchase on desktop
- When browsing starts on tablet, 84% complete the purchase on tablet
- When browsing starts on smartphone, 64% complete the purchase on smartphone

Looking at the affiliate channel, data from Affiliate Window[9] shows that smartphones initiate (30.76%) more than they convert (22.21%) and desktops convert (56.4%) more than they initiate (47.37%):

Journey lengths

Again looking at the Q1 2016 data from Monetate, the time-lag split between first visit and completed purchase is as follows:

- Purchase made within first 60 minutes – 42%
- Between 1 and 7 hours – 9%
- Between 19 and 25 hours – 16%
- Between 42 and 48 hours – 5%

Data from the affiliate channel broadly concurs with the above, with Affiliate Window also reporting that the majority of single device sales (ie those starting and completed on the same device) occur within 24 hours of the first click, with a significant share happening within the first 60 minutes.

However, the picture becomes a lot more complex when a smartphone is used to initiate the journey.

Xmas device patterns

As we know, Xmas is different. Data from Akamai[10] illustrates how device usage shifts during the Black Friday peak weekend. While the traffic levels for mobile over the weekend is consistently high (above normal rates indeed), on the weekdays desktop traffic does perform far more strongly.

Smartphones – conversion best practice

According to Kilian Hauray, VP customer success at iAdvize, smartphones are well-suited to product types with quick-decision cycles – such as tickets and food:

"*Having an intelligent targeting strategy to engage your customers on your website or social media is an essential factor that affects conversion rates. The engagement strategy needs to be more direct on mobile devices. Early interactions are crucial, whereas when shoppers access the website via desktop, there is less concern with the behaviour of visitors on the first pages.*"

---

[9] Affiliate Window, *Cross-device insights*, June 2016
[10] Akamai, *Online Holiday Shopping Trends and Traffic Report for Europe and North America*, February 2016

IMRG © - September 2016

Dr. Armand Farsi, director - ecommerce competence center at arvato SCM, believes that easing product inspiration should be of primary concern on these devices – providing a few helpful settings and features to follow:

- *Keep each step of the funnel short and concise – ideally, split the various checkout steps into multiple pages*
- *Offer a guest checkout*
- *Emphasise the call-to-action by highlighting it in an exclusive colour and appropriate size (minimum 55 x 55 pixels)*
- *Provide payment methods convenient for mobile devices*
- *Automatically and consistently switch the keyboard default to a numerical field when arriving at a numerical form field such as credit card number or phone number*
- *Disable the autocorrect function for email address, first and surname or street name field as it often fails to suggest the intended name. The opposite holds true for the auto-complete ('memory') function supported by Safari and Chrome. This feature helps the user decrease the necessary input data by memorising entries from the past*
- *Consider implementing an address finder*
- *Enable 'click-to-call' customer service phone numbers*

Optimising access to key information on smartphones

A ReBOUND[11] study surveyed the sites of UK retailers to count the number of moves from landing page to international return policy – only 13% (of 141) took 2 moves on a smartphone device, compared to almost double (21%) on desktop.

Julian Wallis, country manager UK & I at Ingenico e-Payments sets out some advice to ensure the experience is appropriate for the medium, which in turn helps increase the chance of conversion:

- *Sites should be mobile-optimised and mobile-responsive so pages identify and adapt to suit the device type and screen size*
- *Try tokenisation – after initial registration, the payment gateway can store a token against the customer's card details, thereby removing the need to re-enter all details for subsequent purchases*
- *On mobile apps, the checkout process should always be held within the app itself rather than sending frustrated users away to a browser to complete the transaction*

---

[11] ReBOUND, *The Great Returns Race*, September 2015

Managing mobile fraud

According to a CyberSource report[12], almost a third of respondents who actively support mobile as a channel believe it's more susceptible to fraud. There's no reason why these devices should be inherently more risky than other channels – they are just different. They offer different data for fraud management (or the same data is less or more useful) and fraudsters may use different tactics in each.

Understanding the differences in shopper behaviour is also important. CyberSource provide three tips for creating mobile-specific fraud rules that help address these differences:

- **Behaviour 1**: Late-night shopping is normal on mobile devices; much less so on PCs
    - Rule change for mobile: remove or relax rules that attach suspicion to certain times of day
- **Behaviour 2**: Smartphones are used while travelling
    - Rule change for smartphones: rethink rules that use IP geolocation criteria. Consider GPS instead, if the data is available
- **Behaviour 3**: Customers may start an order on one device, say a smartphone, and complete it on another, such as their tablet
    - Rule change for mobile: Remove or amend rules flagging multiple devices logged into an account as suspicious

Find out more

This executive summary provides a snapshot of the findings from the full report – members can view the full report by logging into the site – http://www.imrg.org/data-and-reports/imrg-reports/

About IMRG

For over 20 years, IMRG (Interactive Media in Retail Group) has been the voice of e-retail in the UK. We are a membership community comprising businesses of all sizes – multichannel and pureplay, SME and multinational, and solution providers to industry.

We support our members through a range of activities – including market tracking and insight, benchmarking and best practice sharing. Our indexes provide in-depth intelligence on online sales, mobile sales, delivery trends and over 40 additional KPIs.

Our goal is to ensure our members have the information and resources they need to succeed in rapidly-evolving markets – both domestically and internationally.

---

[12] CyberSource, *CyberSource 2016 UK eCommerce Fraud Report*, April 2016