

# Mobile Influence 2013

The growing influence of mobile in store



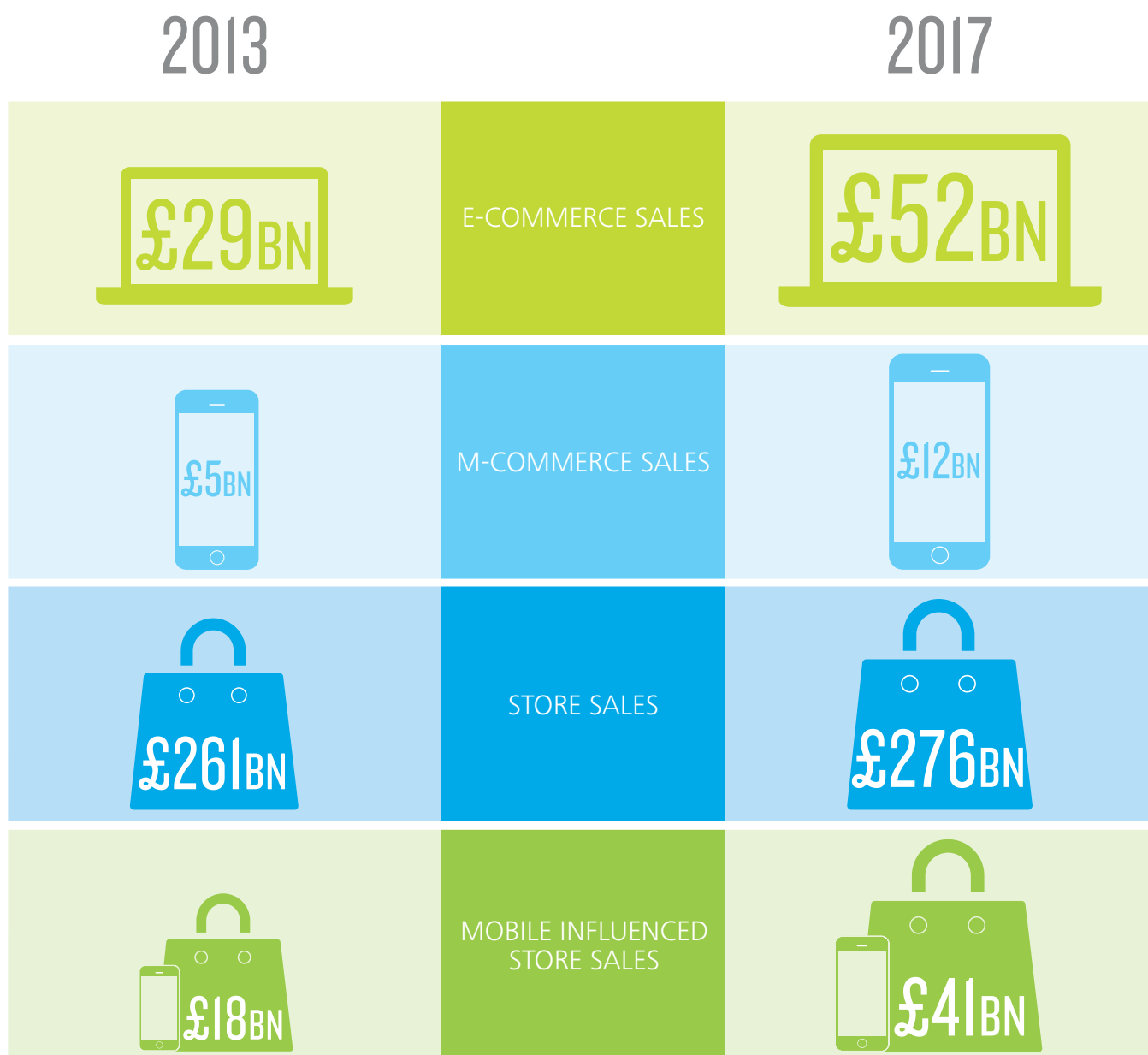
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# The growing influence of mobile in store

Retailers need to shift the focus of their attention from mobile as a sales channel to viewing mobile as a driver of sales. The exponential growth in the ownership and usage of smartphones not only challenges retailers to think about how they make their products and services available to consumers online, but also offline.

The mobile influence factor – the percentage of store sales where mobile phones are used as part of the shopping journey – stood at 6.8% in 2013. This equates to £18bn of stores sales, up 45% on 2012. Deloitte forecasts that the mobile influence factor will continue to rise in line with trends in the uptake of mobile technology and to reach 10-15% of store retail sales by 2017, representing between £27bn and £41bn in store sales.

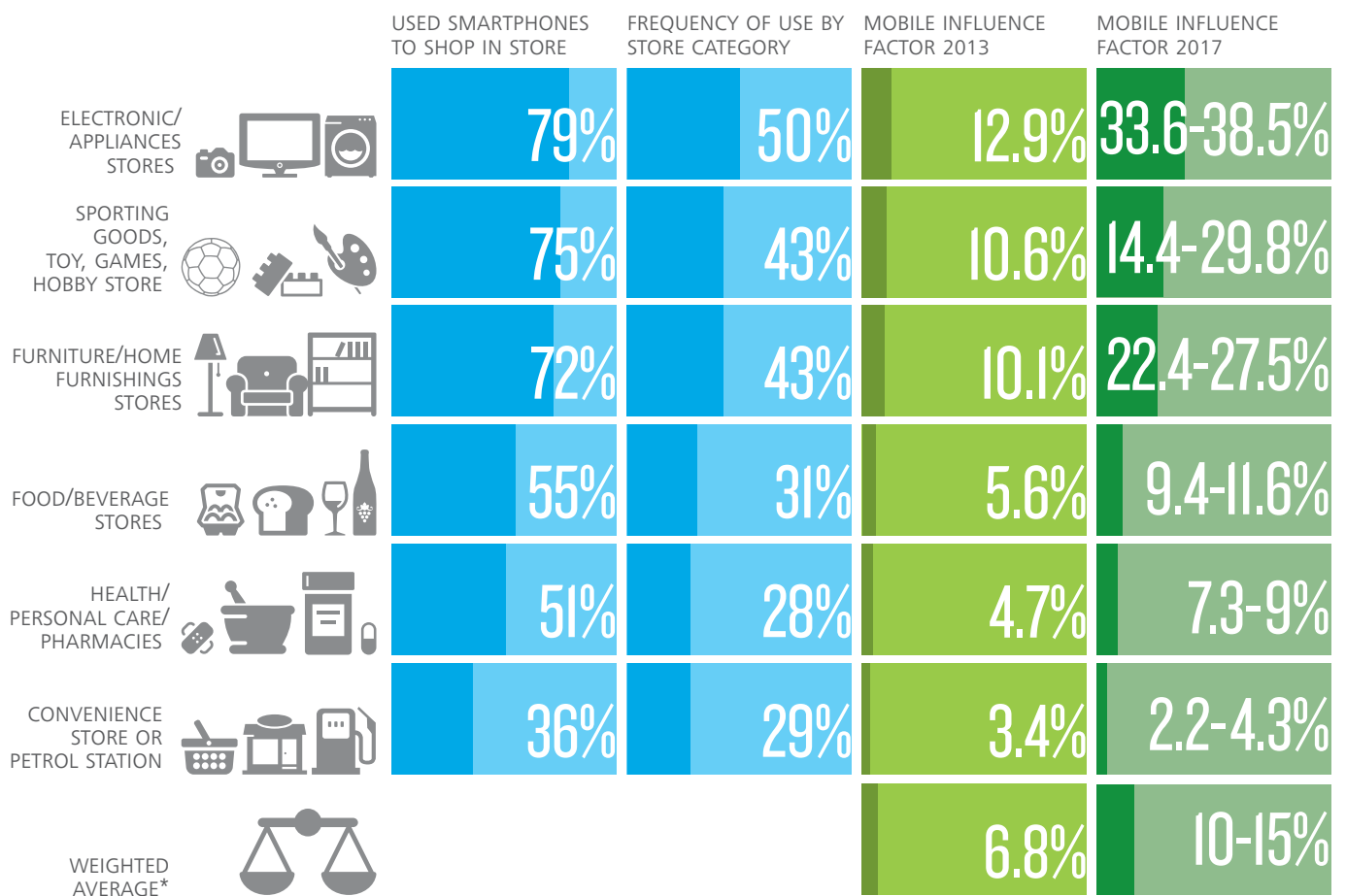
## WHY IS MOBILE INFLUENCE IMPORTANT?



# Mobile influence by category

The mobile influence factor varies by store category, depending on the use of smartphones for shopping and the frequency of use. Electricals and furniture stores, where consumers purchase big ticket items, have the highest mobile influence factor which highlights the role smartphones can play in researching product information and reviews, and comparing prices.

## THE GROWING INFLUENCE OF MOBILE IN STORE

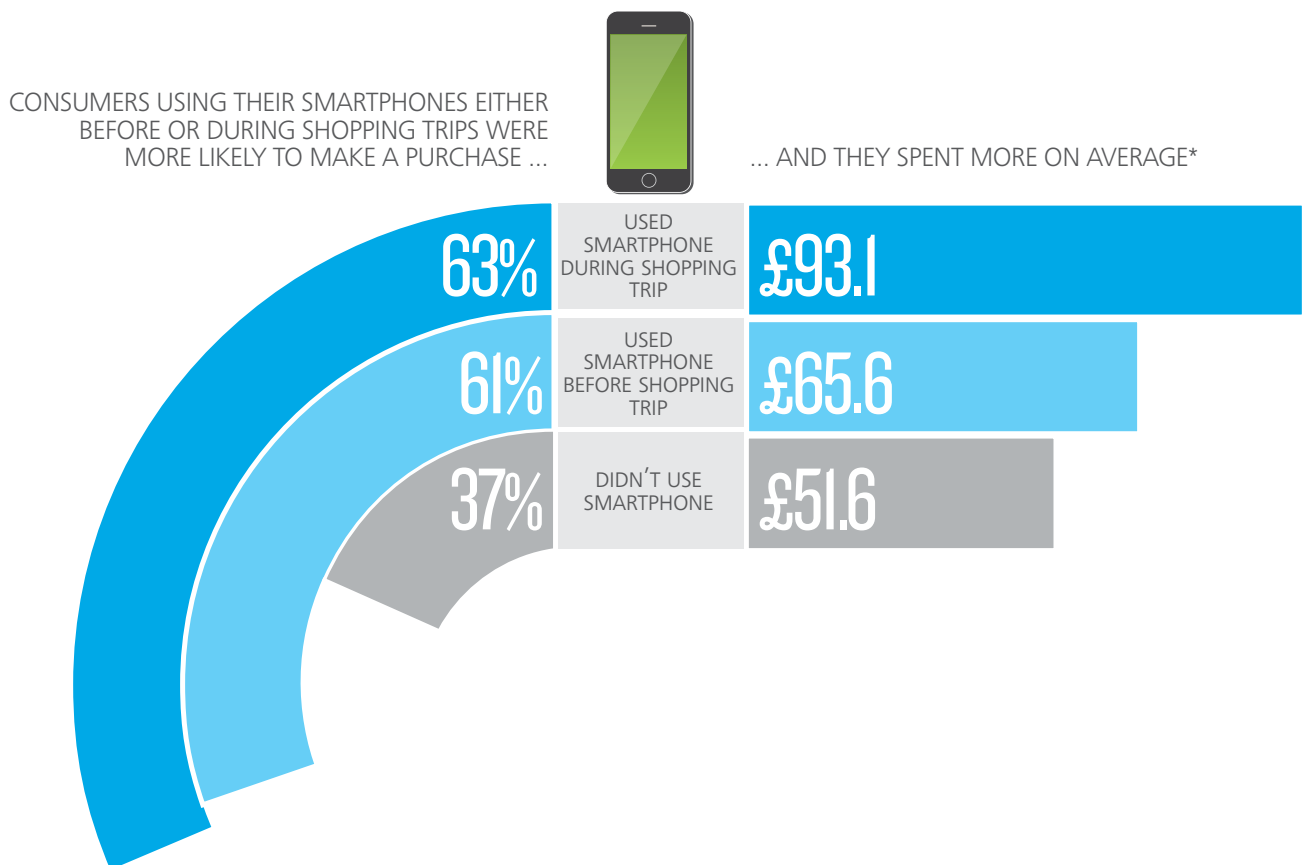


\*Based on weighted average that reflects the varying sales levels for different types of stores

# The business case for retailers to invest in mobile

Consumers that used their smartphones either before or during their shopping trip were more likely than the average to make a purchase. In fact, those using the smartphone during the shopping trip were almost twice as likely to make a purchase.

## MOBILE INFLUENCED SHOPPERS' CONVERSION AND SPENDING IS HIGHER



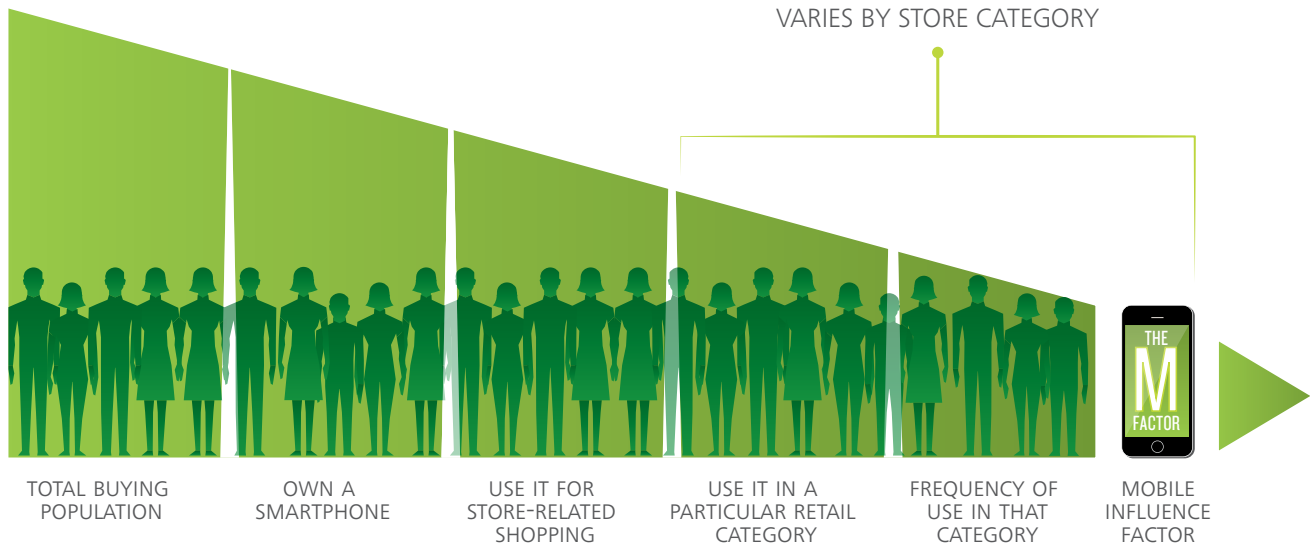
\*Mean average £

## Mobile influenced consumers are more valuable customers

Deloitte's research also showed that consumers that used their smartphone during the purchase journey also spent more than the average:

- Used before shopping trip spent 14% more.
- Used during the shopping trip spent 61% more.
- Those who didn't use their mobile phones either before or after spent 10% less.

## MOBILE INFLUENCE FACTOR METHODOLOGY



## Mobile Influence and Projection

The mobile influence factor is a proprietary methodology calculated for each store category using survey data on the consumers who own a smartphone and how frequently they use their smartphone to aid shopping in a particular store category. The mobile influence factor for each category is weighted by % of total retail sales attributed to that category to calculate the aggregate mobile influence factor.

The mobile influence factor projection was based on the projected increase in smartphone penetration from multiple sources, mCommerce and eCommerce growth rates, and estimated growth in adoption and frequency of use of smartphone shopping by store category.

The survey was commissioned by Deloitte and conducted online by an independent research company in August 2013. The survey polled a national sample of 2,013 random consumers. Data was collected and weighted to be representative of the UK population for gender, age and income.

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