



Consumers Tell All

Part 2: Device of Choice for
Online Shoppers & Buyers



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Mobile devices have enabled consumers to shop when and where they wish, and a better deal is often just a few clicks, or a few taps, away. To be successful, today's marketers must cater to the evolving consumer demands for convenience and connection. Seamless shopping between sites and stores is no longer just a marketer's dream, it's a consumer's expectation.

Consumers are not simply window shopping in your stores or casually browsing your product pages. They are using multiple devices to extend their shopping experience and influence purchase decisions. They have obliterated the linear path to purchase and created their own customer lifecycle dotted with multiple shopping sessions that vary in location, channel and device.

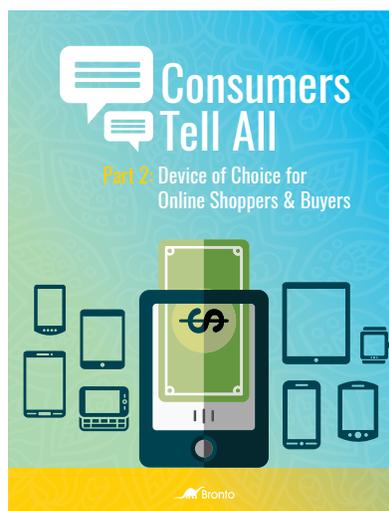
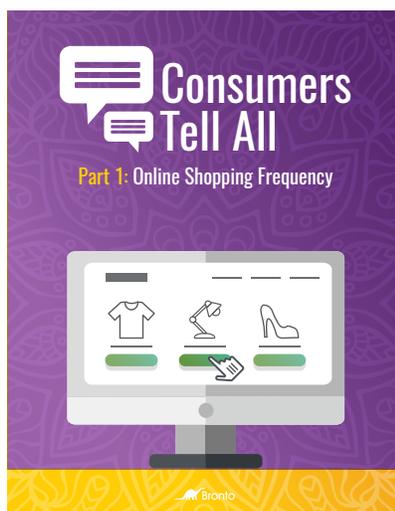
Simply put, consumers are in control of the e-commerce landscape.

Bronto went straight to the source and asked online shoppers to reveal how they shop, confess what annoys them and divulge what can make them want to buy. The results of this study are available in Bronto's 3-part *Consumers Tell All* series.

Part 1: Online Shopping Frequency

Part 2: Device of Choice for Online Shoppers & Buyers

Part 3: Shopping Cart Use & Expectations



Bronto Software partnered with Ipsos to survey online shoppers about their online shopping habits, mobile device preferences and interactions with online shopping carts, cart abandonment and post-abandonment reminder messages. The study was conducted in January 2015 and consisted of 1,012 consumers in the United States who bought online within the past 12 months. Respondents who had not made a purchase online were excluded from the study and are not included in the sample size or resulting analysis.

Introduction to Part 2

Today's consumer is hyper-connected. It's not uncommon for her to check her inbox before getting out of bed and review her Facebook feed with her morning coffee. This deep integration of mobile devices into our daily routines, combined with ever-faster, always-on data connections, has changed the way we shop. Retailers that want to meet the demands of today's connected consumers must understand their evolving shopping and buying behaviors.

For Part 2 of the *Consumers Tell All* series, online shoppers were asked about the devices they own and how they use them when shopping and purchasing. These revelations are organized into the following areas:

1. Device Ownership

2. Preferred Device for Shopping and Buying

3. Use of Apps vs. Mobile Web Browser

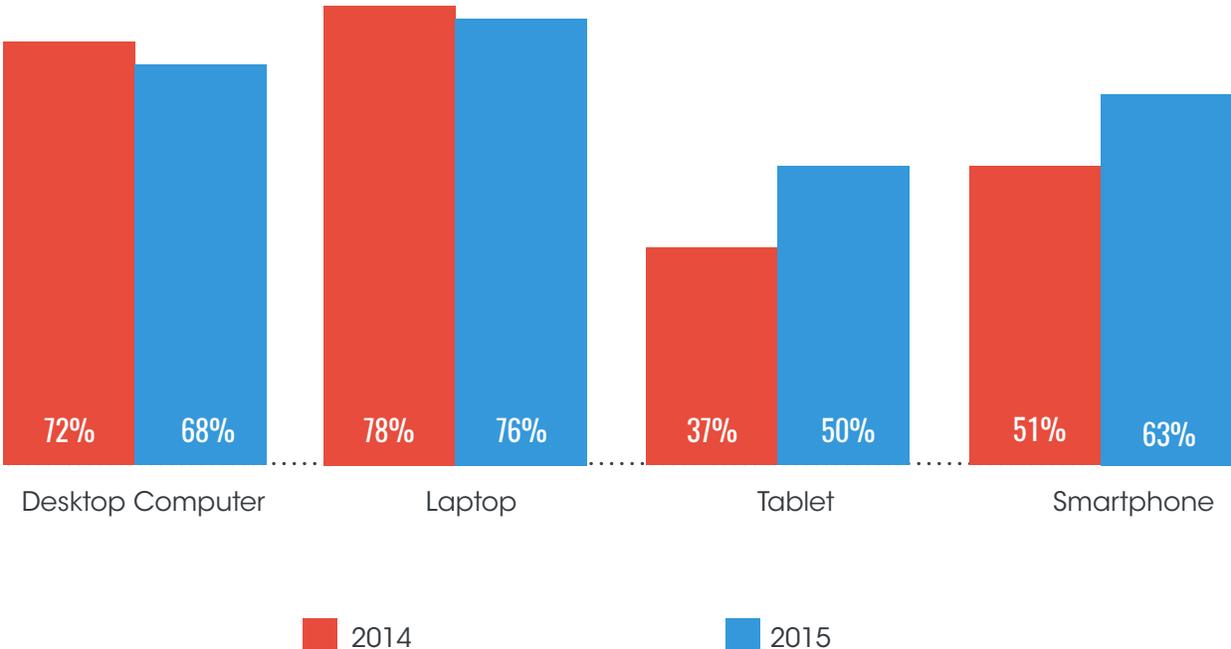


Device Ownership - All Online Shoppers

Although mobile device adoption is on the rise, desktop and laptop computers continue to be the most owned devices by online shoppers (though ownership has declined since our last study). Desktop ownership declined by 4% and laptops by 2%. Meanwhile, two types of mobile devices, tablets and smartphones, exceeded the 50% ownership threshold for the first time. Smartphone ownership jumped 12% and the greatest increase was in tablet ownership, which leaped 13%.

An interesting bit of information surfaced in our results: Although it is the least popular device, one in three online shoppers reports owning a non-smartphone. The study found that 36% of the women and 30% of the men own a basic mobile phone. Considering the limitations of basic mobile phones and the lack of opportunities for media-rich e-commerce experiences, the device is not included in the rest of the report.

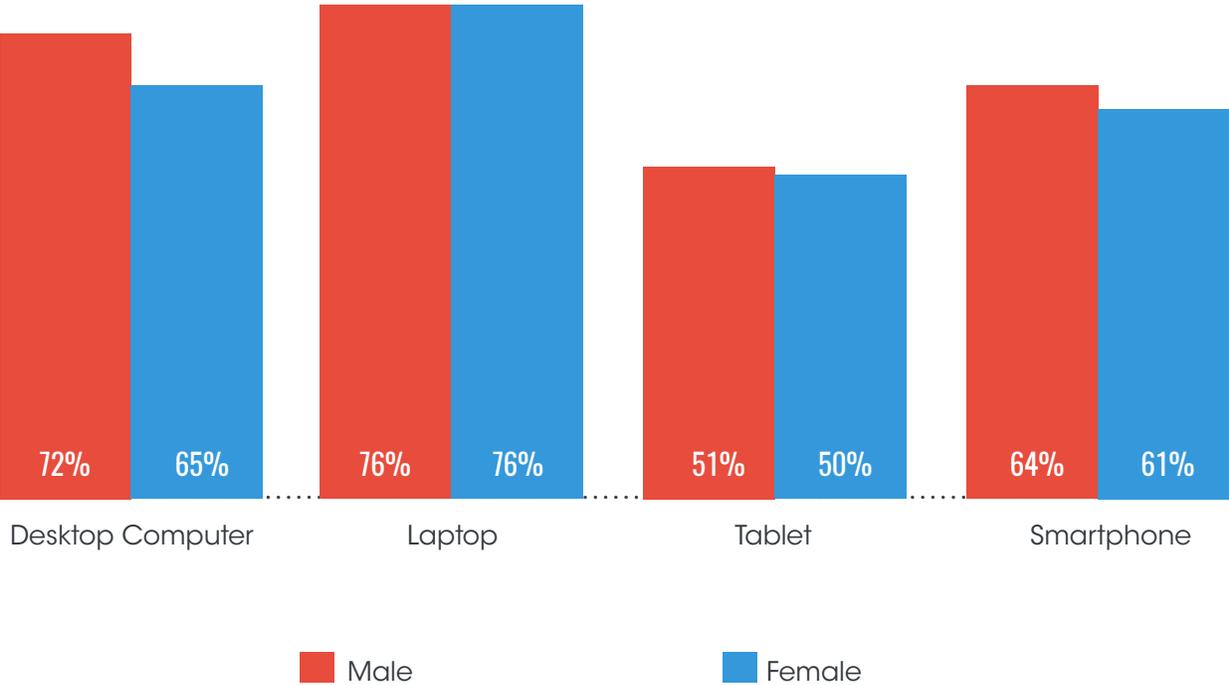
Which of the following do you have in your household? Please select all that apply.



Device Ownership - by Gender

While smartphone ownership is nearly even between male and female online shoppers (64% vs. 61% respectively) and tablet ownership is neck-and-neck, males are more likely than females to own desktop computers.

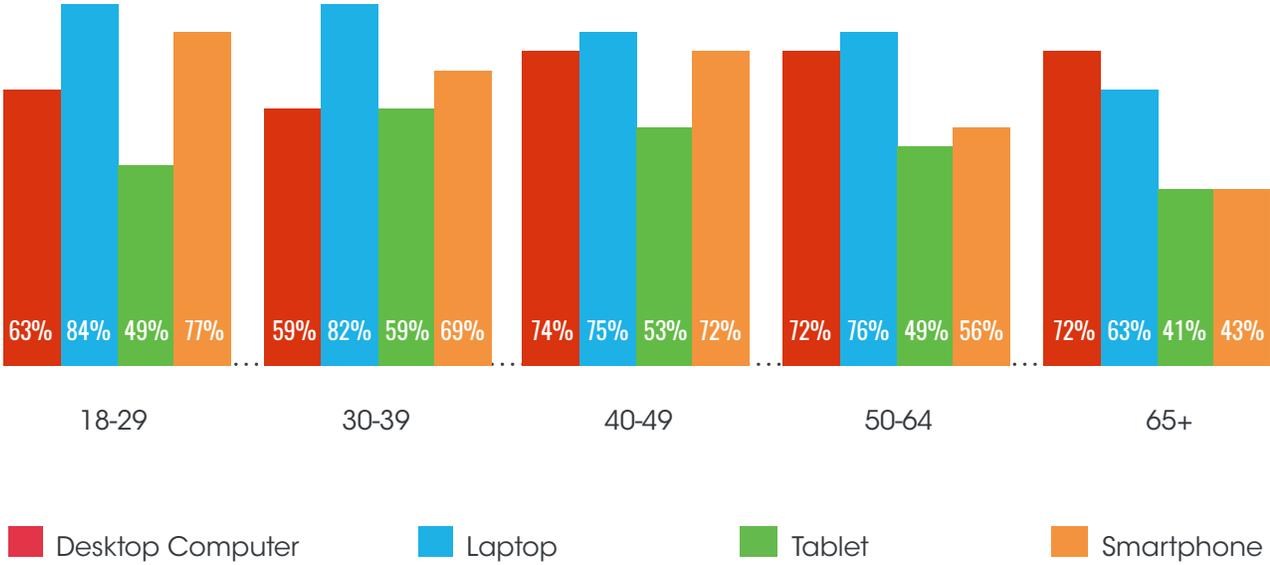
When compared to our previous study, desktop ownership decreased 4% for both men and women. Laptop ownership also declined for both genders, though the trend is stronger with women (-3%) than men (-2%).



Device Ownership - by Age

There's an interesting split in preferred device along age lines. Laptops are the most popular device for online shoppers under 65 years old, while shoppers 65 and older are more likely to own a desktop computer than a laptop. And the second most owned device for shoppers under 40 is a smartphone, while shoppers over 40 (excluding those 65+) have desktops in second place.

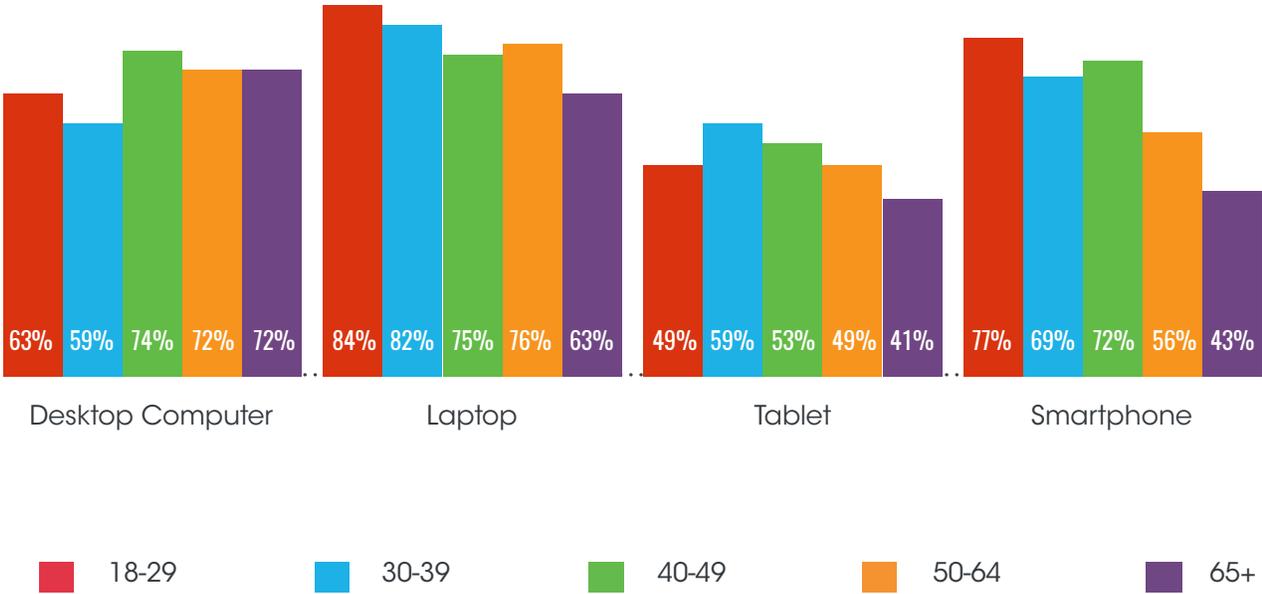
Our last study found tablets to be more popular with seniors than smartphones. This trend has now shifted, with seniors who own tablets jumping from 35% to 41% and smartphones from 26% to a whopping 43%. Larger screen sizes on smartphones and better resolutions may have encouraged this demographic to be less dependent on tablets.



Device Ownership - by Age

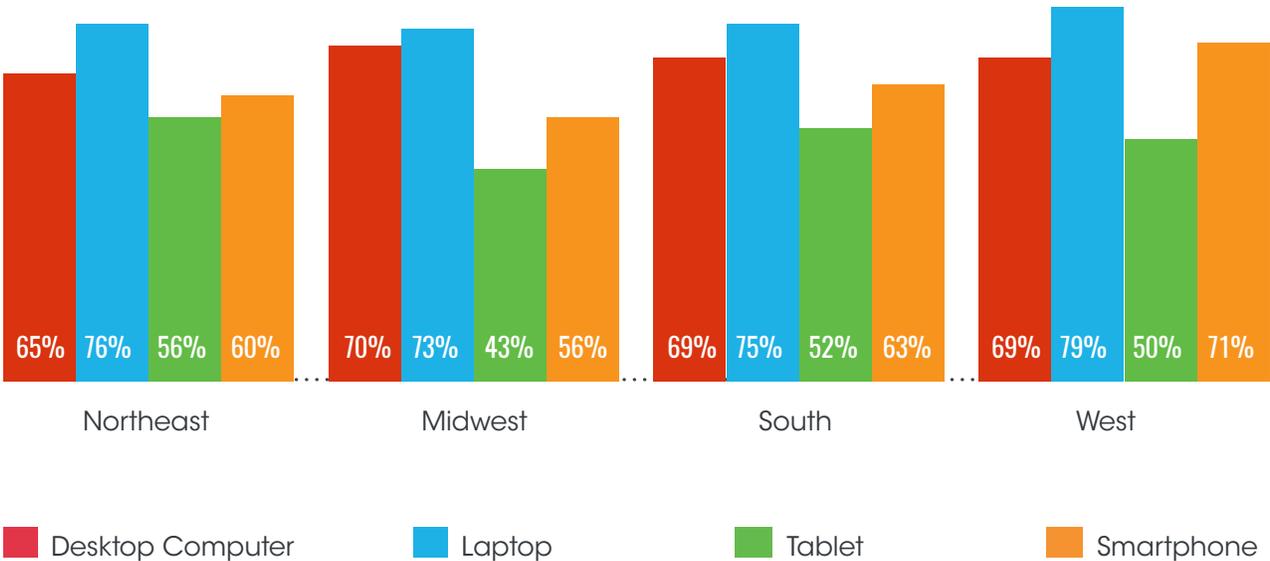
When the same data from the previous chart is organized by device, the trends become even clearer. Laptops are still the most widely owned devices for all ages except seniors, though ownership declines with age. Conversely, older online shoppers, those over 40, are likely to still own a desktop computer.

Smartphone ownership follows a similar pattern as laptops with ownership declining by age, though online shoppers ages 40-49 buck the overall trend slightly.



Device Ownership - by Region

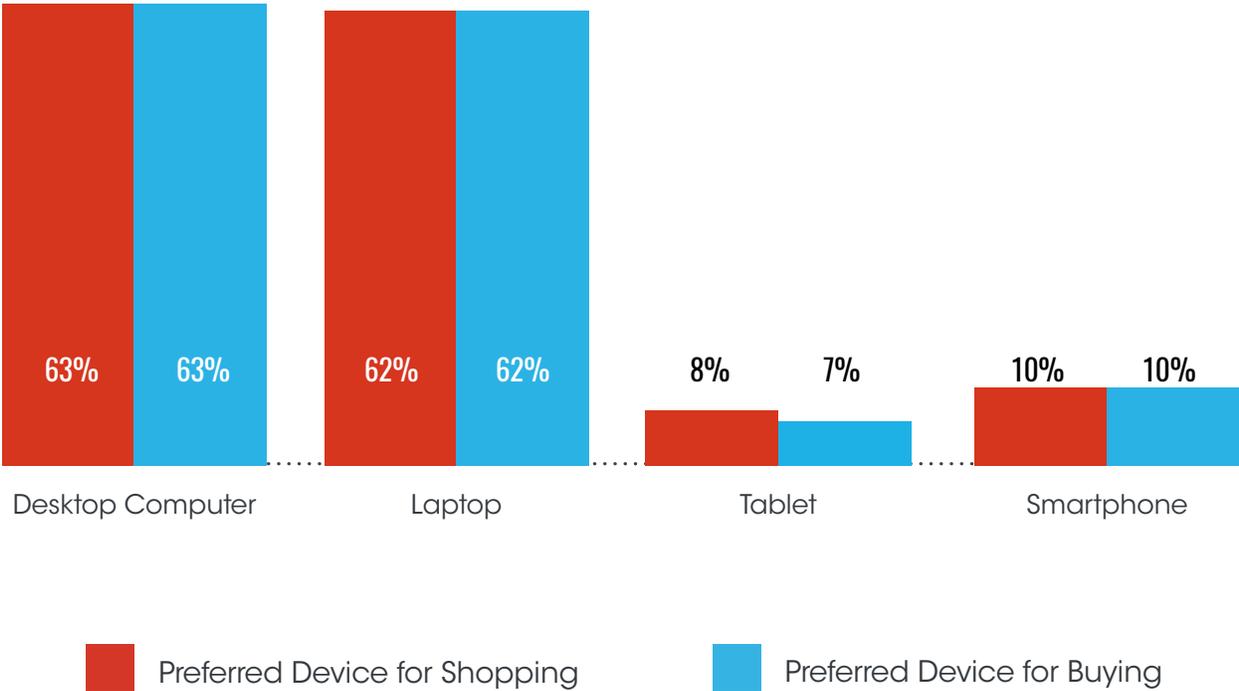
When analyzed by region, a few noteworthy differences emerge. Online shoppers in the Northeast are more likely to own a tablet than shoppers in the rest of the nation, and those in the West are more likely to own a smartphone. Keep the device ownership of these regions in mind as you review the shopping and buying preferences later in this study. Also, as marketing strategies become more mobile-focused and location-based, it's worth considering regions where mobile data connections may be slow, unavailable or expensive.



Preferred Device for Shopping and Buying – All Online Shoppers

This study asked online shoppers to reveal how their shopping and buying behavior has been influenced by the adoption of mobile devices. The results show that even though shopping and buying on mobile devices continues to increase, laptops and desktops are still the most preferred devices.

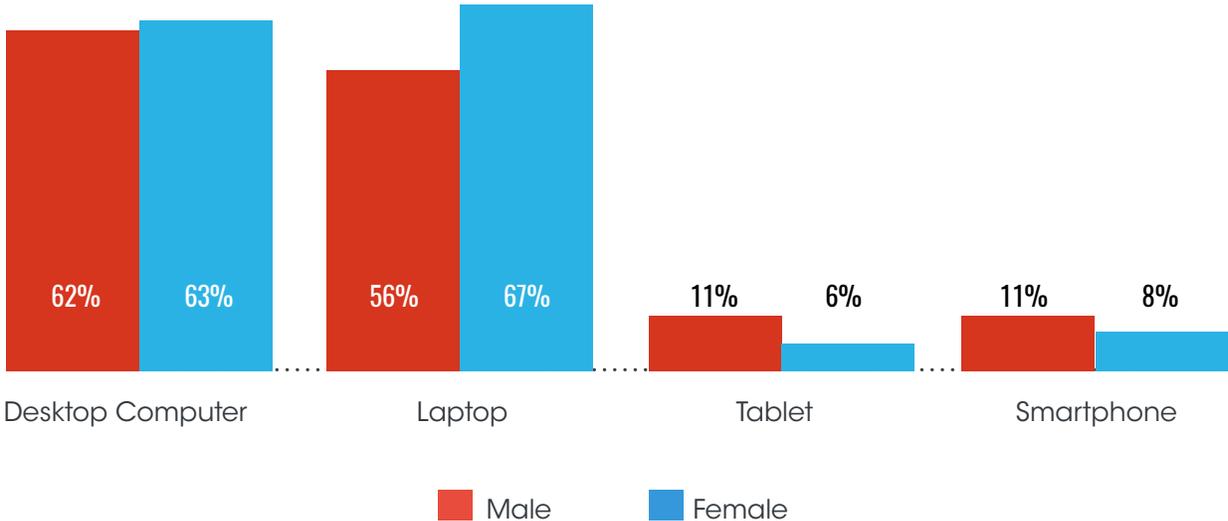
Looking specifically at mobile devices, smartphones were preferred over tablets. For this perspective of all online shoppers, shopping and buying preferences were nearly identical, but different results emerge when the data is further analyzed.



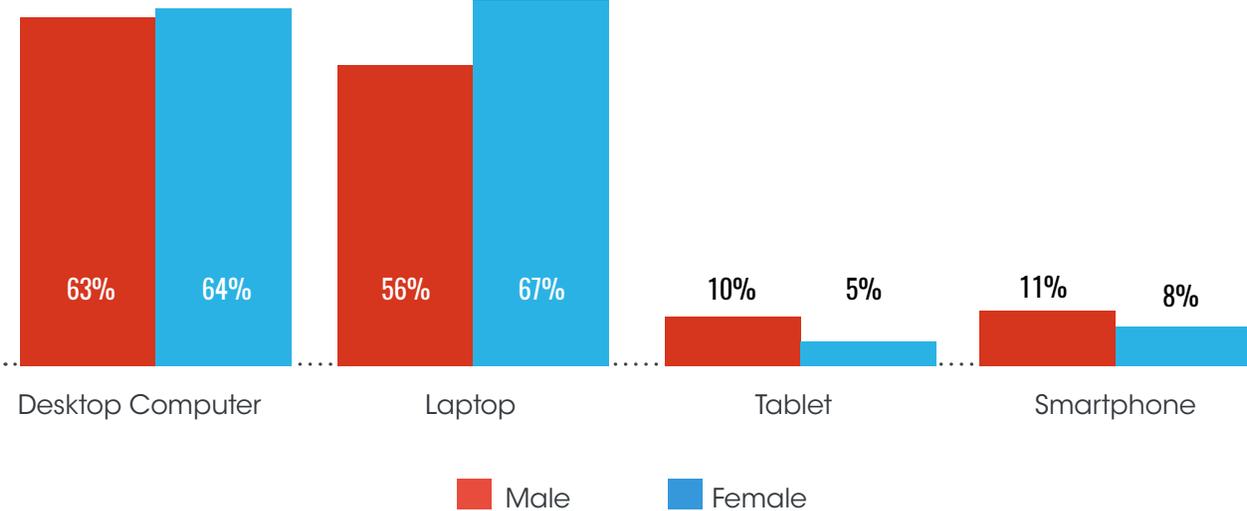
Preferred Device for Shopping and Buying – by Gender

Males showed a stronger preference for shopping and buying on mobile devices. Smartphone shopping and buying for males was 3% higher than their female counterparts. The most striking contrast can be seen with tablet preferences. Five percent more males preferred shopping on tablets than females. Buying on tablets was 6% higher compared to females.

Preferred Device for Shopping – by Gender



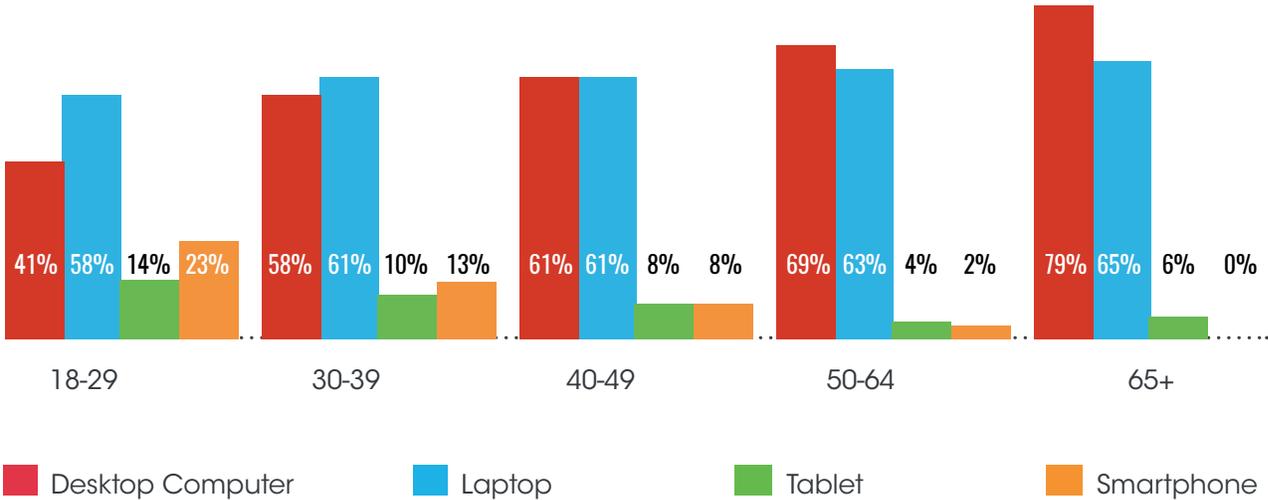
Preferred Device for Buying – by Gender



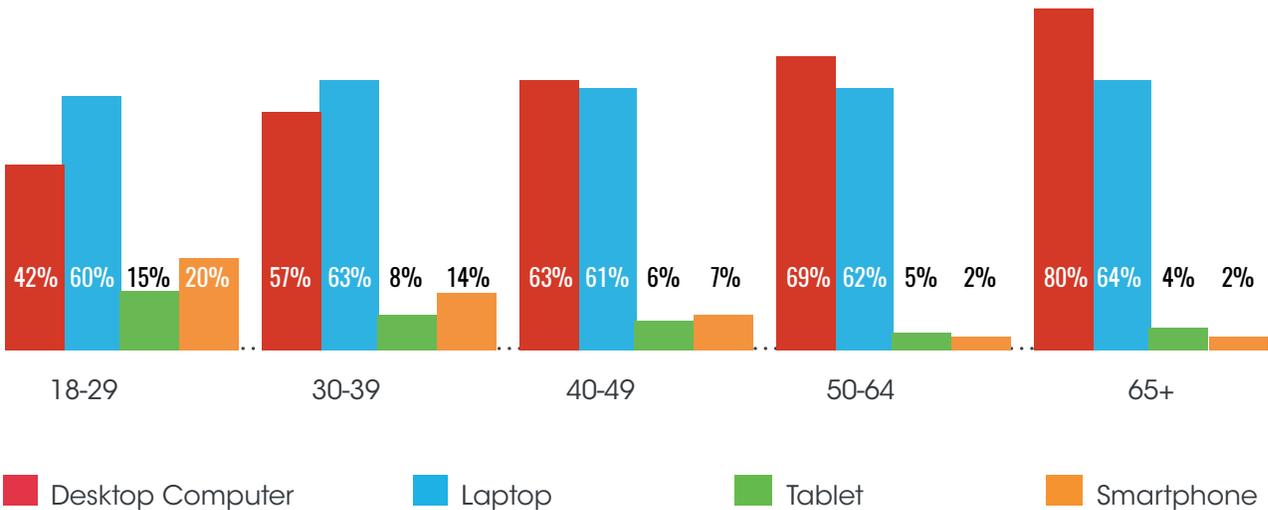
Preferred Device for Shopping and Buying – by Age

Laptops and desktops are strongly preferred as the primary device for shopping and buying across all ages. Desktop computer preferences increase with age, while laptop preferences remain fairly constant for all demographics. Smartphone and tablet preferences are strongest for those under 40, with smartphones the more commonly used of the two. Twenty-three percent of online shoppers ages 18-29 prefer shopping on a smartphone, and one in five prefer shopping on a tablet.

Preferred Device for Shopping - by Age



Preferred Device for Buying - by Age



Preferred Device for Shopping and Buying – by Region

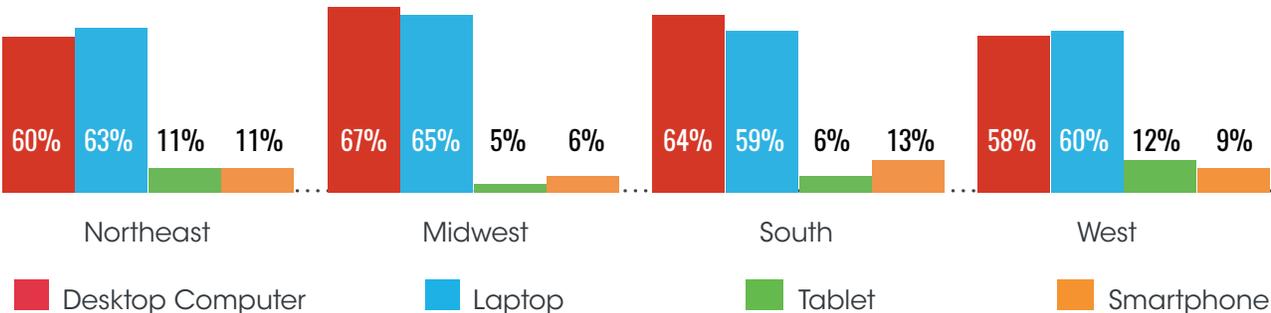
Desktop and laptop preferences are relatively close in all regions of the US; however, when we look at the preferred mobile device, we can see some notable differences.

For example, the South shows the strongest preference for shopping on smartphones with 13% of online shoppers in that less-densely populated region preferring the device. This rate is more than double the rate of online shoppers in the South who prefer shopping on a tablet.

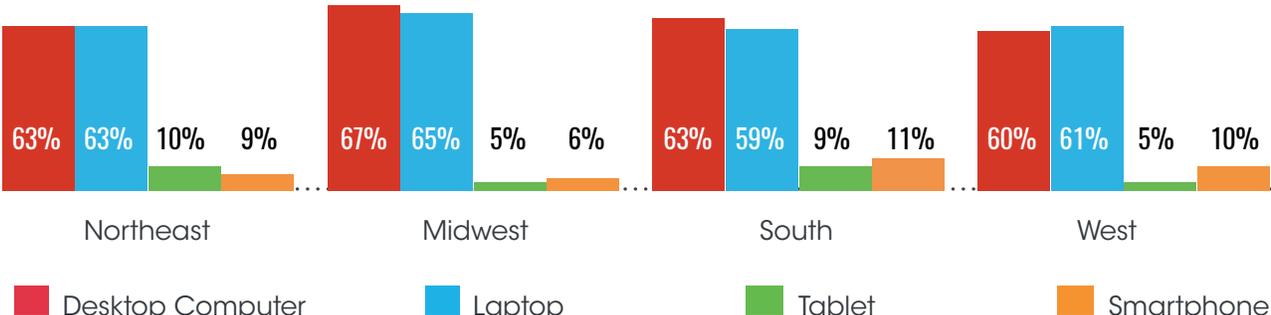
Shopping on a tablet was more popular in the West with 12% of online shoppers preferring that mobile device compared to 9% choosing a smartphone.

Smartphone owners in the South showed the strongest preference for completing an order on a mobile device. Eleven percent of Southerners preferred using a smartphone when buying, slightly more than the West at 10%. Interestingly, the West showed the greatest divide between which mobile device to use when completing an order with only 5% of Western online shoppers preferring to use a tablet to buy.

Preferred Device for Shopping – by Region



Preferred Device for Buying – by Region

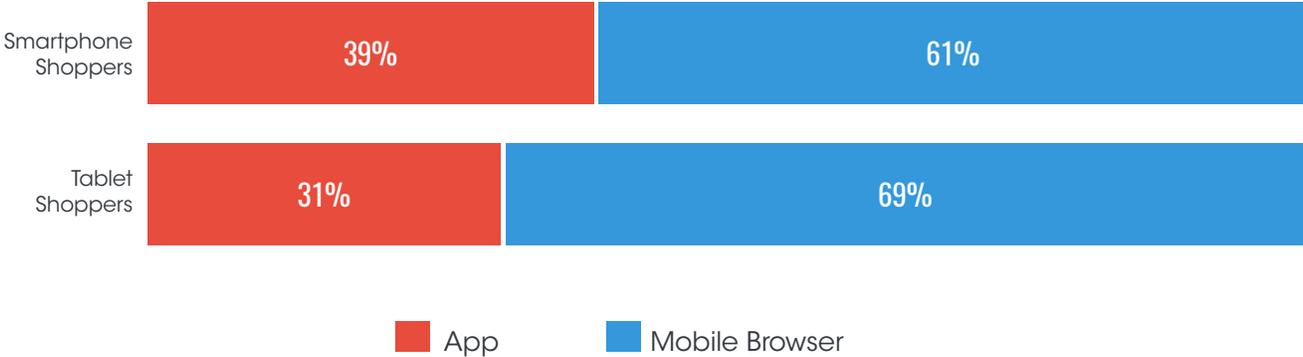


Use of Apps vs. Mobile Web Browsers – All Online Shoppers

Many retailers have focused time, resources and budget on optimizing sites and emails for mobile devices. Optimizing an in-app experience has proven to be more difficult; often the relationship between the app and the site seems disjointed. Engagement and interaction using mobile web browsers and apps can also vary significantly between smartphones and tablets. To better understand which options hold favor, both smartphone and tablet shoppers were asked which experiences they prefer for shopping online.

Mobile web browsers were preferred over apps for both smartphone and tablet shoppers with 61% of smartphone shoppers preferring mobile web browsers and only 39% for apps. For tablet shoppers, mobile web browser preferences were even stronger at 69%.

App vs. Mobile Browser

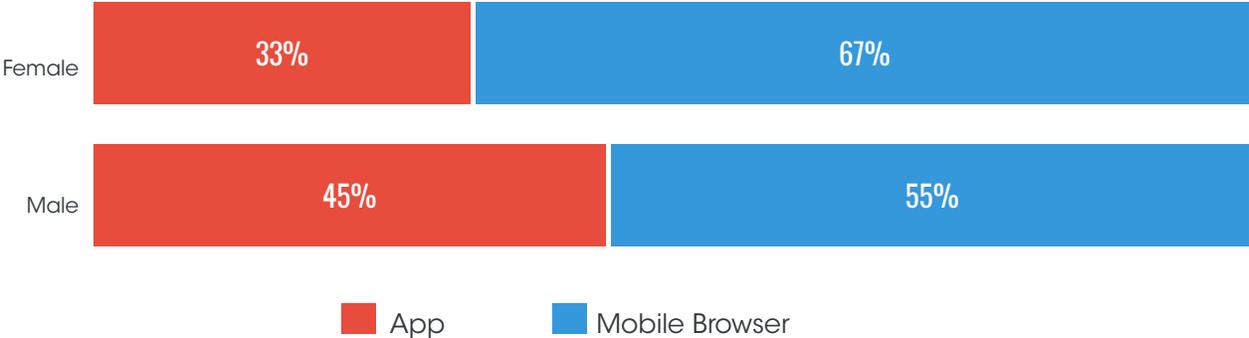


Use of Apps vs. Mobile Web Browsers – by Gender

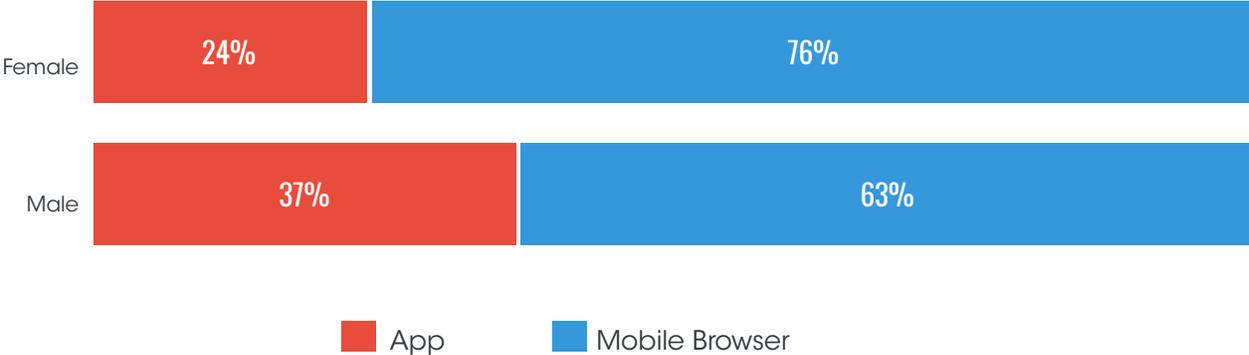
Female online shoppers showed the strongest preference for mobile browsers on both smartphones and tablets, with 76% of the group preferring to use mobile browsers and only 24% preferring apps.

The closest split between apps and mobile browsers was for male smartphone shoppers who were nearly evenly split, with 45% preferring apps and 55% preferring mobile browsers.

App vs. Mobile Browser - Smartphone Shoppers by Gender



App vs. Mobile Browser - Tablet Shoppers by Gender

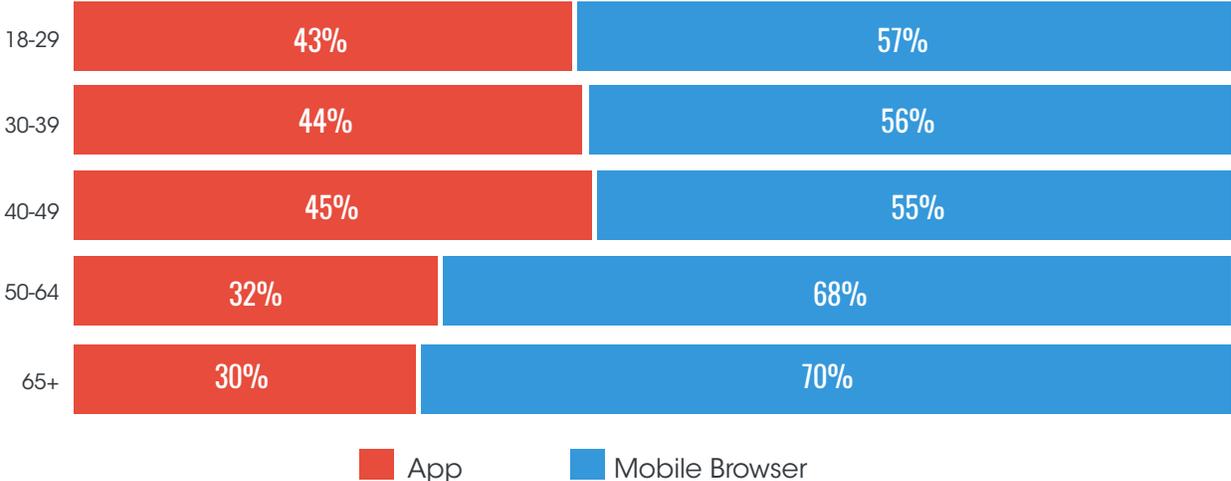


Use of Apps vs. Mobile Web Browsers – by Age

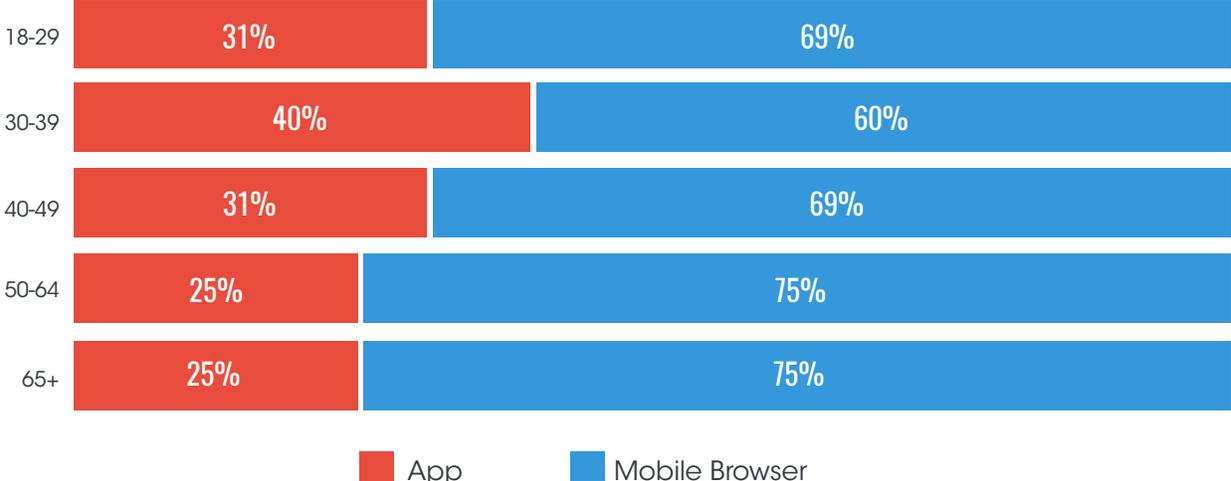
When analyzed by age, it's revealed that smartphone shoppers under the age of 40 share similar preferences, with more than half using mobile browsers. Older smartphone shoppers, those over the age of 50, show an even stronger preference toward mobile browsers with 68% of 50-64 year olds and 70% of those 65+ ranking mobile browsers over apps.

Tablet shoppers aged 30-39 show the strongest app preference - this age group also has the highest rate of tablet ownership at 59%. When tablet shopping is compared to smartphone shopping, online shoppers aged 18-29 and 40-49 show the most variation across devices. Twelve percent more of the 18-29 year olds would prefer a web browser when shopping on a tablet, and 14% more 40-49 year olds prefer a web browser when shopping on a tablet.

App vs. Mobile Browser - Smartphone Shoppers by Age



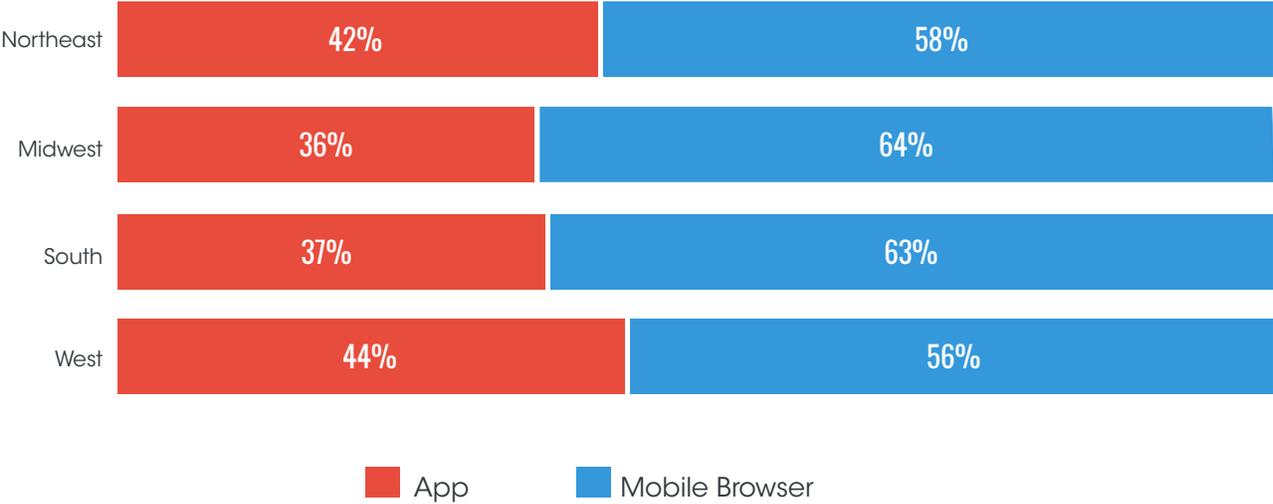
App vs. Mobile Browser - Tablet Shoppers by Age



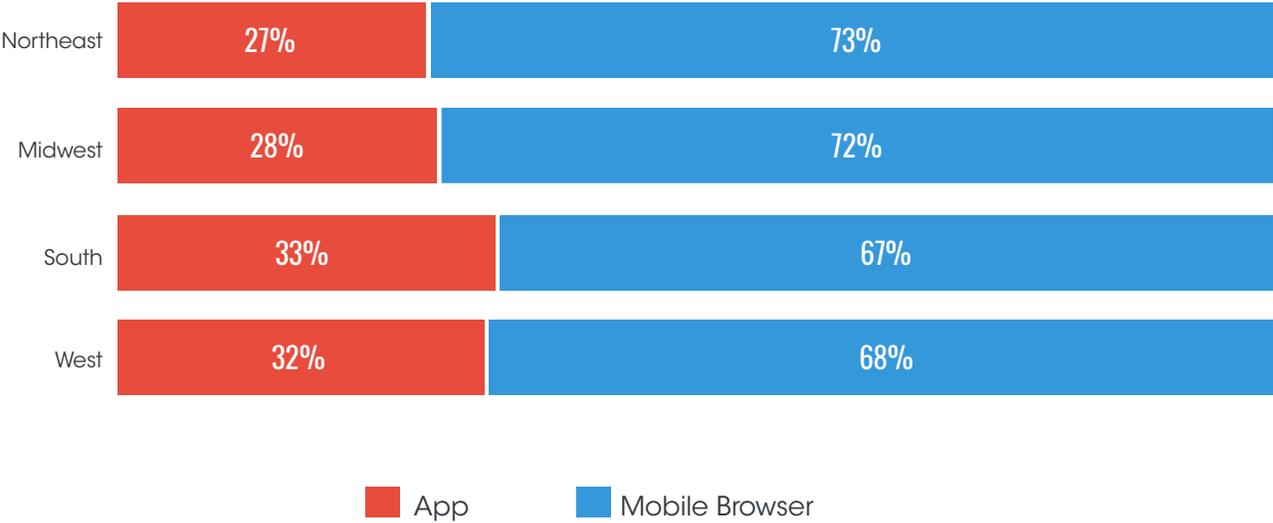
Use of Apps vs. Mobile Web Browsers - by Region

Mobile browsers were preferred by smartphone shoppers in all regions. The Northeast and West regions show the narrowest gaps. Tablet shoppers showed even stronger preferences for mobile web browsers in all regions. While all regions reflected this trend, tablet shoppers in the Northeast and Midwest showed the strongest preferences with 73% of Northeasterners and 72% of Midwesterners preferring browsers.

App vs. Mobile Browser - Smartphone Shoppers by Region



App vs. Mobile Browser - Tablet Shoppers by Region



Wrap Up

Mobile devices, such as smartphones and tablets, are quickly becoming an indispensable part of the shop-to-buy equation. Knowing the shopper's preferred device and how they interact with it (be it through an app or a web browser) can help you be more successful at influencing the purchase.

Today's path to purchase is a circuitous one, and shoppers expect retailers to know what they need along the way. Failing to meet the needs of these connected consumers can lead to lost sales and cause them to look elsewhere when they are ready to shop again.

In the next edition of our *Consumer Tells All* series, *Part 3: Shopping Cart Use & Expectations*, we'll dig into the survey data a bit more to learn where the shopping cart fits into this evolving shopping experience and how shoppers use the cart to transition between channels and devices.

