Introduction

The shopping options presented to consumers continue to expand. The wide adoption of mobile devices that connect anywhere have blurred the line between shopping online and being in a store. How distinct are the online and in-store shopping experiences? How far has the online experience come in replicating what you can do in a store?

The following report is based on a survey of 1027 Americans who have used their mobile devices to shop. The survey’s main intent was to uncover how mobile and online shopping are impacting the overall shopping experience. The survey was sponsored by Wanderful Media, a Silicon Valley Company reinventing local digital discovery shopping.

For this survey, “shopping” was defined as any activity encompassing the broader shopping experience including browsing, discovering a new product, reading product reviews, researching a purchase, checking with friends or experts about what to buy, asking the retailer questions about a product, purchasing a product, returning a product, sharing details of a purchase on social media, and so on.

Key Findings

• Online and in-store shopping overlap
  - 77% have checked online to find product information while shopping in a store
    ◦ Millennials most likely to shop online while in a store (85%)
    ◦ Fewer Baby Boomers shop online while in a store (63%)
  - 62% purchased the item they were considering after checking online
    ◦ Of the 62% who purchased, 49% bought in the store they were in and 48% bought online
  - 91% have gone into a store because of an online experience
    ◦ 60% because of an email promotion, 59% found an online coupon, 52% due to an online circular

• Online and in-store shopping have different strengths
  - Online shopping is preferred for researching purchases (71%) and ease of finding a specific item (59%)
  - In-store is better for making a return (64%), knowing exactly what is being purchased (53%), and establishing a relationship with the merchant (51%)
  - Shoppers prefer to buy items that reflect personal style in-store but prefer to buy items without variation online

• Online shoppers multi-task
  - 63% shop online while watching TV
  - 28% shop online while socializing with friends
  - 24% shop online while in a coffee shop or restaurant
  - 22% shop online while commuting or moving between locations
• Impulse shopping happens in stores and online
  - 74% have made an impulse purchase in a store in the past month
  - 65% have made an impulse purchase online in the past month
  - Impulse shopping driven by both online and offline activities including browsing in a store (60%), promotional emails (42%), window shopping (36%), being presented with other items when checking out online (27%) and newspaper circulars (23%)
  - More shoppers make impulse purchases because of traditional newspaper circulars (23%) than Facebook (22%), Twitter (13%) or Pinterest (13%)

• New sales tax on online purchases impact shoppers
  - 22% do less shopping online because of changes to online sales tax
  - 32% of men do less shopping online because of changes to online sales tax

Detailed Findings
Online shopping happens in the store
The separation between online and in-store shopping is blurring. We asked participants if they had ever checked online for information about a product that they were thinking about buying while they were shopping inside a store. Most participants, 77%, reported that they had gone online as part of their in-store shopping.

This behavior is even more common among younger people. Among Millennials (20-35 years old), 85% had checked out a product online while shopping in a store, markedly more than Baby Boomers (over 50 years of age) where only 63% reported this behavior.
The most common in-store online shopping task is searching with a smartphone

Among participants who have gone online to check out product information while shopping in a store, the most-used device is far and away the smartphone, 92%, with tablets coming in second at 34%.

Shoppers are most likely to use search engines while in a store (84%), followed closely by checking out online stores like Amazon (76%). Interestingly, more than half report visiting the website of the store they were in at the time (53%) and more than one-third have used social media to shop while in a store (37%).

Several participants took the time to write in other online activities they had done while shopping in a store. Frequently provided answers included checking QR codes, visiting review sites, and using pricing apps.
Research typically results in purchase

This online research in the store doesn’t stop shoppers from buying. Most of the time (62%) shoppers do purchase the item that they were considering buying, while some (25%) buy something different based on their online research. It is uncommon for shoppers to simply not purchase anything after doing their online research in a store with only 13% of participants reporting that was the final outcome.

However, the purchase that resulted from the online research was not always made in the store the shopper was in at the time. Almost half of those who bought something bought it in the store they were in (49%), while nearly half bought online (48%). The remainder (3%) made a purchase at a different store.
Online experiences send shoppers into stores

The vast majority of shoppers surveyed, 91%, have gone into a store as a result of an online experience. The most common reasons cited included receiving an email with details about a sale or other promotion (60%), finding online coupons (59%), seeing an online ad for a sale (56%), searching for a product and finding a store location (55%), and browsing an online circular (52%).

Online and in-store shopping both have advantages

The shoppers in our study were presented with a list of factors that contribute to a positive shopping experience. The survey asked where each experience was best – online or in a store.

Participants reported that online shopping was best for having plenty of information to research purchases (71%) and making it easy to find a specific item (59%). However, in spite of efforts by online retailers to make returns easy, stores still excel at making returns easy (64%), knowing exactly what was being purchased (53%), and establishing a relationship with the merchant (51%).
No shipping charges important in-store; price comparison important online

Our shoppers were asked about specific shopping experiences that would happen in a store and asked how important each was. Participants place most importance on not paying extra for shipping and easily making returns when they shop in a store.
In a similar question, participants were asked to rank the importance of specific online shopping experiences. Participants cited that information access was most important to them when shopping online – both the ability to compare prices from a large range of sources as well as having plenty of information to research purchases.

![Graph showing factors contributing to a positive online shopping experience]

Interestingly, all in-store and online experiences included in the survey were rated as either “very important” or “important” by more than half of participants. For example, 73% said discovering a previously unknown product was important when shopping in a store and 78% said the same about shopping online.

**Items reflecting personal style bought in-store; books and electronics bought online**

Unsurprisingly, the decision to purchase either online or in a store is very much related to the product being purchased. Participants were asked about a variety of types of goods and asked whether they preferred to buy them online or in a store. Typically participants prefer to buy items that express personal style when in a store. This included furniture, shoes, and clothing. Items with less variation in their presentation are the ones most typically bought online – for example books and consumer electronics. Most participants have no preference for where they buy toys and sporting goods.
Multitasking while shopping online very common

Participants report that they frequently do other things while shopping online. The most common activity is watching TV (63%), followed by shopping online when socializing with friends (28%) or while at a coffee shop or restaurant (24%). Online shopping even occurs when moving around such as when commuting or while in a car (22%).

There are some distinct generational differences in habits related to online shopping. Gen X does the most online shopping while watching TV (71%), while Millennials are much more likely to shop online while socializing with their friends (36%).
Impulse purchases happen everywhere

Impulse purchases do not happen only in stores - they also happen online. More than two-thirds of participants (65%) had made an impulse purchase online in the month prior to taking the survey. This is only slightly fewer than those who made an impulse purchase in a store (74%).

![Graph showing impulse purchase rates in stores vs. online.](image)

Online and in-store impulse purchases are driven by a wide range of online and offline factors. Traditional offline activities such as browsing in a store and window shopping still drive much impulse purchasing. Online activities such as email promotions and seeing related items while checking out are also effective.

Interestingly, the traditional newspaper circular is still driving more impulse buying (23%) than Facebook (22%), Twitter (13%), or Pinterest (13%).
Changes in sales tax impacting online shopping

In September of 2012, online stores such as Amazon began to charge sales tax to more of their customers. Almost half of survey participants, 48%, have noticed this change.

This change has impacted the buying behavior of some participants. Among those who noticed the increases, 22% reported that they do less online shopping as a result.

Among this group, men (32%) were much more likely than women (17%) to change their online purchasing habits as a result of the sales tax changes. The age group most impacted by the changes is Baby Boomers with 28% of those over age 50 saying they do less online shopping as a result.
Survey Methodology

In December 2012, 1027 consumers completed an online survey on their shopping habits. All participants live in the United States and use a mobile device for shopping.

The 1027 shoppers who participated in the survey included both men and women. They represented a wide range of ages and household income.

Laptop computers (77%) are at the top of the list of devices participants use to browse, check reviews, find a store, buy a product, or do other online shopping activities. However, smartphones come a very close second at 75%. These are ahead of desktop computers (67%) and tablets (53%). Interestingly, some participants (10%) use gaming consoles for online shopping. Almost all participants using gaming consoles for shopping were Millennials. Note that these numbers do not represent the use of mobile devices for shopping among the general population as the use of mobile devices to shop was a requirement to participate in the survey.
TECHNOLOGY BLURS THE LINE OF ONLINE VS. IN-STORE SHOPPING
A SURVEY OF CONSUMERS WHO USE MOBILE DEVICES TO SHOP

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About Wanderful Media
Wanderful Media is a Silicon Valley company reinventing local discovery shopping. Providing reach into more than 80 percent of U.S. markets through trusted media brands, Wanderful Media helps retailers bring consumers into local stores and gives consumers the most convenient way to discover local merchandise. The company is backed by a powerful group of media companies including Advance Digital, A. H. Belo Corporation, Community Newspaper Holdings Inc., Cox Media Group, The E. W. Scripps Company, Gannett Co., Inc., GateHouse Media, Inc., Hearst Corporation, Lee Enterprises, MediaNews Group, The McClatchy Company, and The Washington Post Co.

Unlike price comparison, daily deal and couponing sites, Wanderful Media makes discovery shopping engaging, fun and social for consumers, wherever they are and however they shop – tablet, mobile and web. The company’s Find n Save® product offers local media affiliates a complete discovery shopping solution, designed to connect retail advertisers with millions of consumers. Wanderful Media is headquartered in Los Gatos, Calif. and on the web at www.wanderful.com.