

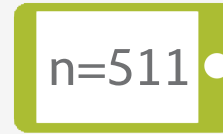
2013 Digital Publishing Report: Retail Apps & Buying Habits

January 2013

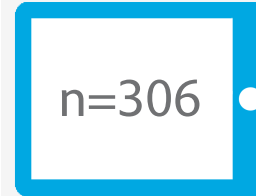


Research Methodology

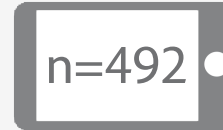
- Edelman Berland Online Survey
- Field Dates: November 28th, 2012-December 3rd, 2012
- Audiences: n=1,003 18-54 year olds who currently own a smartphone and/or tablet. This includes consumers who use these devices to shop and those who do not use their devices to shop.



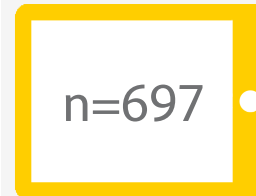
smartphone shoppers



tablet shoppers

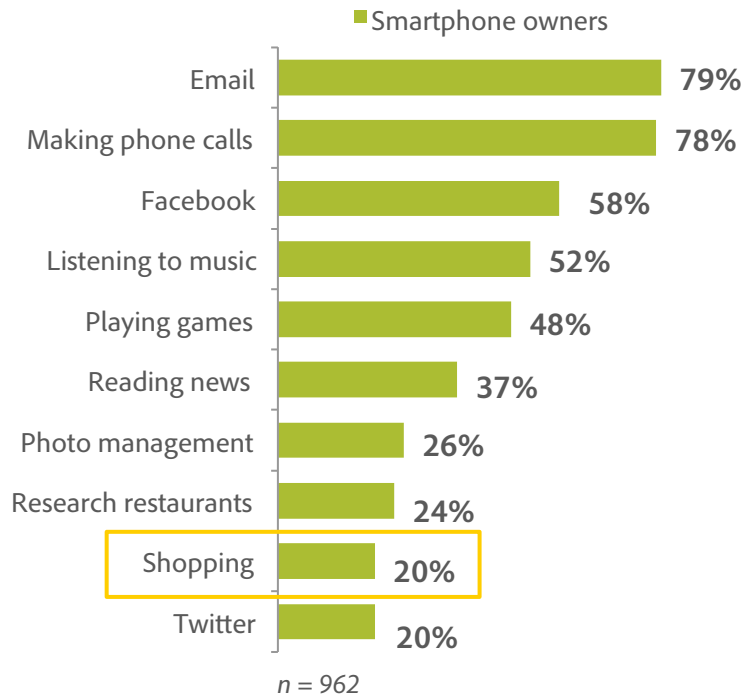


smartphone non-shoppers



tablet non-shoppers

Twice as Many Tablet Owners Use Their Device for Shopping vs. Smartphone Owners



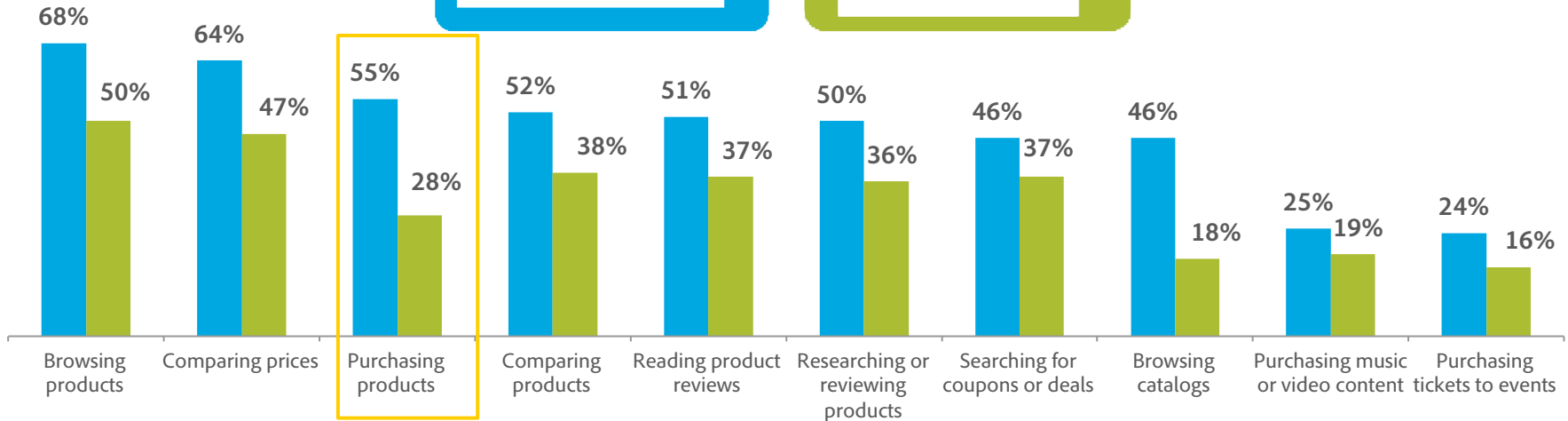
For which of the following do you typically use a tablet/smartphone ?

Tablet Shoppers Don't Just Browse, They Buy

Tablet shoppers are more likely to purchase products vs. smartphone shoppers

Smartphone shoppers are more likely to use their phone for comparison shopping

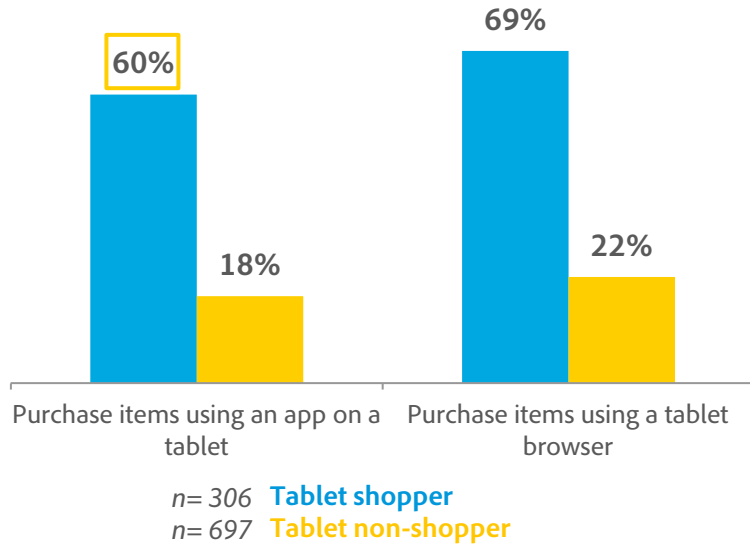
n= 306 **Tablet shopper**
n= 511 **Smartphone shopper**



For which of the following functions do you primarily use a tablet/smartphone when shopping for products/services?
Of the roles selected, which one would you say you use a tablet/smartphone for most often?

More Than Half of Shoppers Expect to Make a Purchase on a Retail App in the Next Year, 15% More Than Have Used Apps in the Past 3 Months

LIKELY TO EXTREMELY LIKELY (7-10)



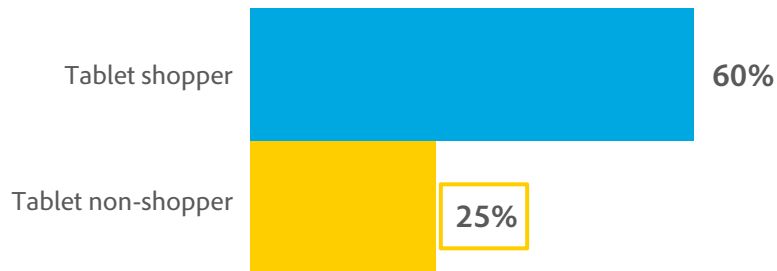
LIKELY TO EXTREMELY LIKELY (7-10)



1 in 4 Consumers Who Didn't Shop on Their Mobile Device in 2012 Plans Increased Usage of Apps for Shopping in 2013

TABLET

LIKELY TO EXTREMELY LIKELY (7-10)



n= 306

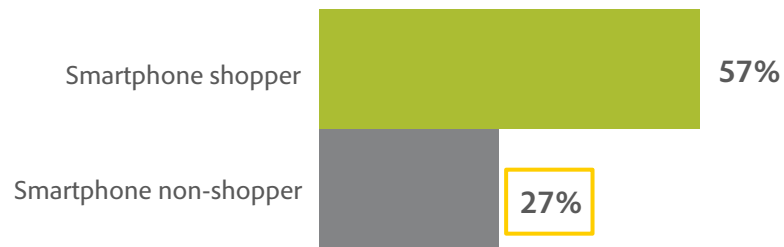
Tablet shopper

n= 697

Tablet non-shopper

SMARTPHONE

LIKELY TO EXTREMELY LIKELY (7-10)



n= 511

Smartphone shopper

n= 492

Smartphone non-shopper

How likely are you to increase your usage of apps on a tablet for shopping for products & services over the next year?

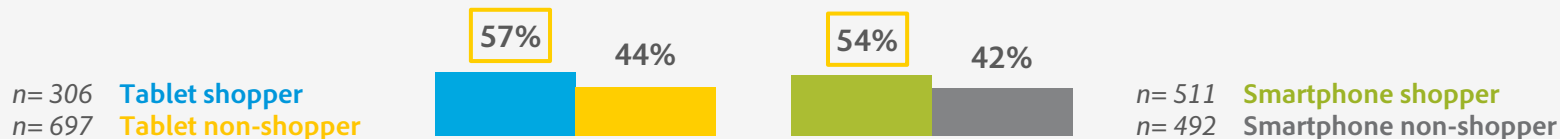
How likely are you to increase your usage of apps on a smartphone for shopping for products & services over the next year?

Shoppers Gravitate to Apps from Their Favorite Stores and Strengthen Brand Affinity With Use

	Tablet shopper	Smartphone shopper
I typically download a shopping app after already being exposed to the brand	70%	68%
I only use shopping apps for my favorite stores	67%	67%
Using shopping apps strengthens my connections to the brand	38%	42%
Typically after using a shopping app I become more favorable toward the brand	37%	37%
I typically download a shopping app to become familiar with a new brand	21%	21%

How important is the retailer brand in your decision to use the app?

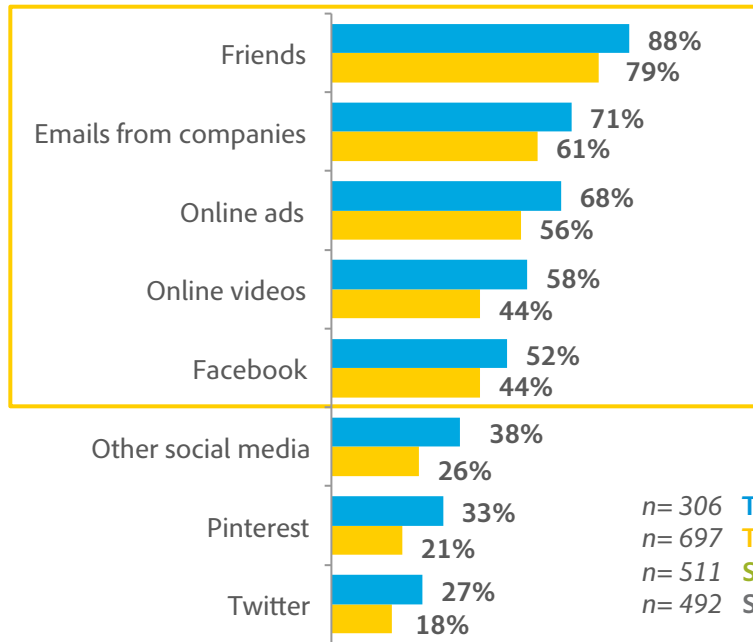
IMPORTANT TO VERY IMPORTANT(8-10)



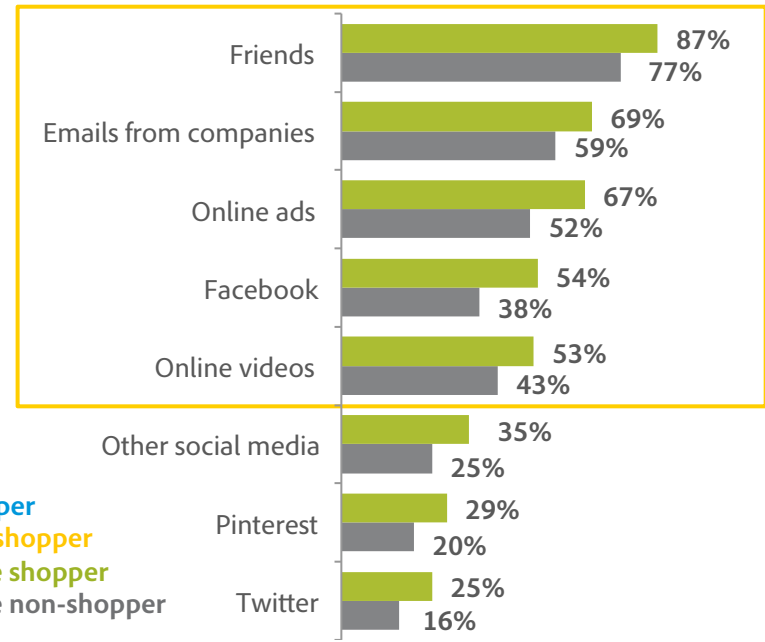
*Please tell me the extent you agree or disagree with the following statements?
How important is the retailer brand in your decision to use the app?*

Friends and Social Media Influence Mobile Shopping, Retailer Communications Also Affect Purchases

TOTAL INFLUENCE (A GREAT DEAL/ A LOT/ SOME)



n= 306 **Tablet shopper**
 n= 697 **Tablet non-shopper**
 n= 511 **Smartphone shopper**
 n= 492 **Smartphone non-shopper**



To what extent do the following have an influence on what you buy online using a smartphone or tablet?

Consumers Share Opinions of Apps In-Person and on Social Media, Find Out About New Apps Online

How do you share app opinions?

Where do you find out about new apps?

53% In-Person

21% Facebook

19% Email

42% App Store

37% Friends

32% Website of the company
sponsoring the app

25% Facebook

22% Physical Store

n=1,003

How do you typically share your opinions of new apps with others?

Where do you typically find out about new shopping apps?



Shoppers Value Function and Experience, But Smartphone and Tablet Users Have Different Priorities

What characteristics are most important for a shopping apps?

IMPORTANT TO VERY IMPORTANT (7-10)

Tablet App

52% Money saving offers when using apps

49% Images and slideshows of the product at different angles

48% Ability to purchase directly from the app vs. using the browser

47% Support for loyalty programs

47% Support for couponing

Smartphone App

67% Money saving offers when using apps

60% Ability to locate physical stores

58% Ability to purchase directly from app vs. using the browser

57% Support for couponing

56% Support for loyalty programs

Which of the following characteristics do you feel are most important for a shopping app to have?

How important are the following characteristics to you when using a shopping app on a tablet/smartphone?

Summary of Key Findings

1. Tablet users (55%) are more likely than smartphone users (28%) to use their device to purchase products and services
2. 56% of smartphone shoppers and 60% of tablet shoppers are likely to make a purchase using an app in the next year
3. 45% of tablet shoppers and 49% of smartphone shoppers are interested in using apps to replace purchasing products in a mobile browser
4. 1 in 4 people who don't shop on mobile devices intend to use mobile apps to shop in 2013 - 27% smartphone and 25% tablet
5. 67% of tablet and smartphone shoppers only use apps from their favorite stores; App interactions strengthen connection to the brand – 38% tablet shoppers and 42% smartphone shoppers
6. The most influence over mobile purchasing decisions comes from
 - Friends – smartphone (87%); tablet (88%)
 - Emails from company – smartphone (69%); tablet (71%)
 - Online ads – smartphone (67%); tablet (68%)
 - Facebook – smartphone (54%); tablet (52%)
7. Shoppers share their opinions of new apps via
 - Facebook (21%)
 - Email (19%)
 - In-person (53%)
8. Tablet shoppers most value money saving offers (52%), interactive images and slideshows (49%), and the ability to purchase from an app instead of a browser (48%); smartphone shoppers most value money saving offers (67%), the ability to locate physical stores through an app (60%), and the ability to purchase from an app instead of a browser (58%)



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