



HOLIDAY SHOPPING & NEW MOBILE TECH INSIGHTS

October 9, 2014





@MobilePersonas

Today's Presenters



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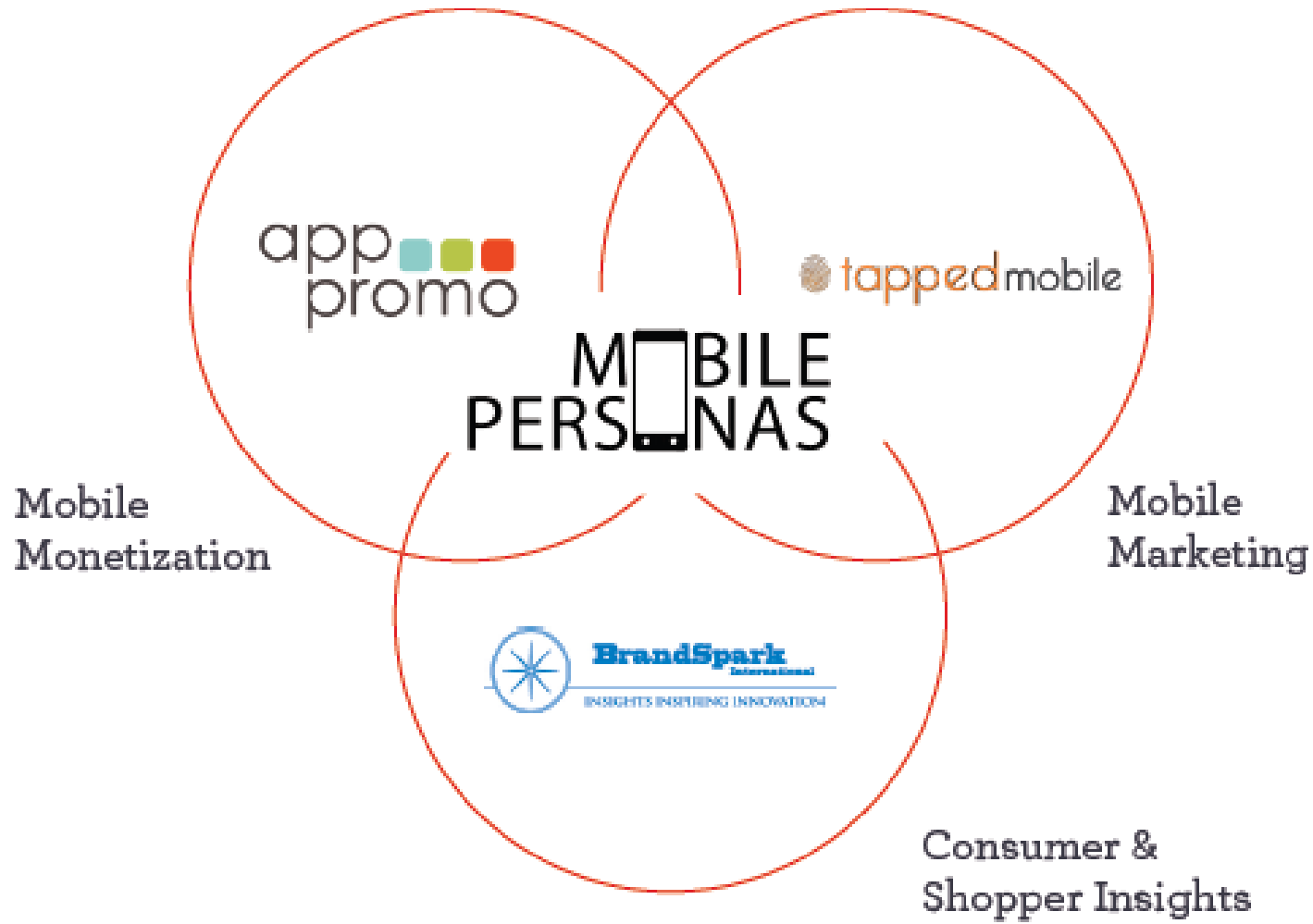
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A Multidisciplinary Approach





- Part of the largest shopper study in Canada
- Over 7,000 respondents interviewed for Mobile Personas
- Almost 1,000 interviewed for Holiday 2014 study (Fielded September 2014)
- 3rd Annual Mobile Personas study coming soon!
 - (To be fielded in November 2014; deadline to submit questions **October 15, 2014**)

Mobile Personas account for 13.5 million Canadians.



MOBILE MOMS

4 MILLION CONSUMERS

Moms 25-54
(with kids aged 0-18 at home)



MOBILE MILLENNIALS

4.5 MILLION CONSUMERS

Millennials 18-29



MOBILE MEN

5 MILLION CONSUMERS

Men 25-54

Why Study Mobile?

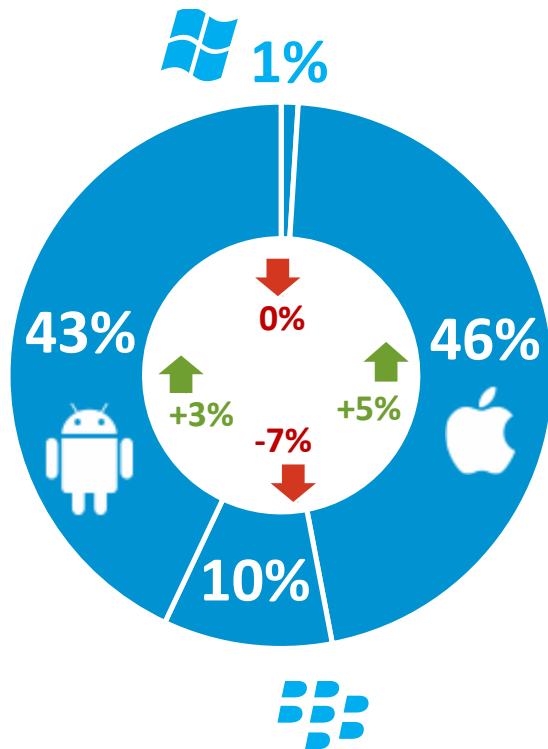
- Mobile is a connective tissue – central to lives of consumers
- Always need more Canadian data
- Mobile is exploding but still not studied enough
- The need for actionable insights

Holiday 2014: TOP 10 MOBILE INSIGHTS

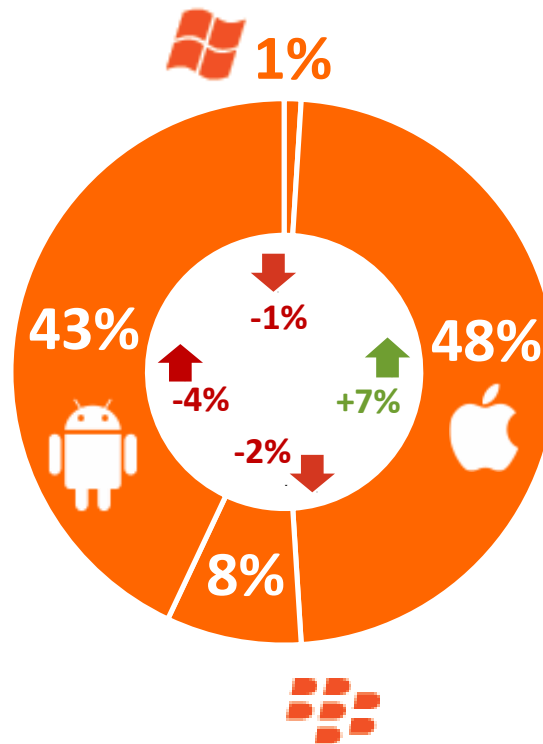
1. It's a two horse race – between operating systems.

1. TWO HORSE RACE: Apple saw growth among all 3 personas. Android is strong #2.

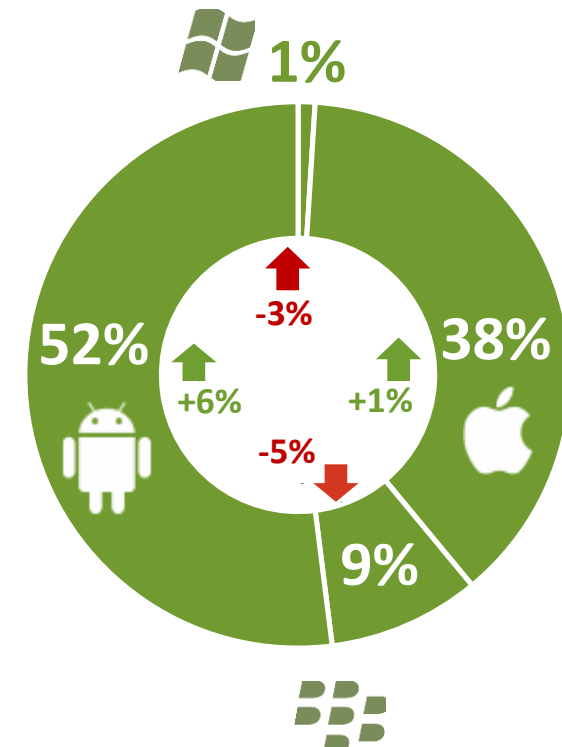
Operating System Market Share – Mobile Personas



Mobile Moms



Mobile Millennials

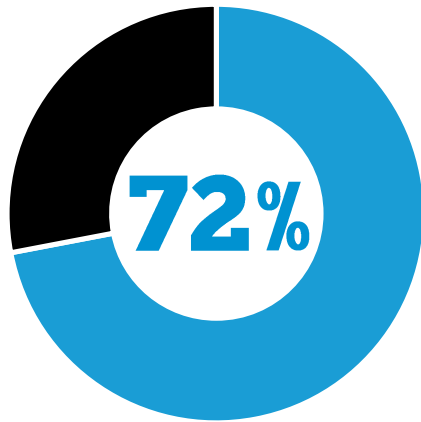


Mobile Men

2. Retailers need to find ways to provide value as mobile is the go-to sales clerk.

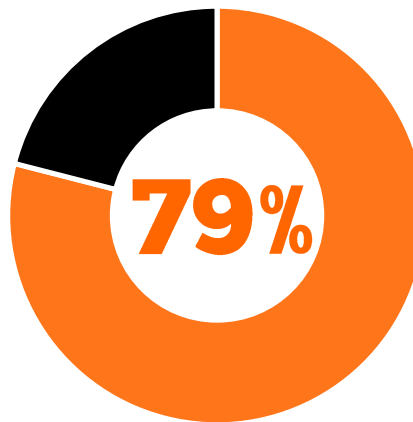
2. Mobile as the sales clerk: Well over 70% of all shoppers are using their smartphones for shopping.

Do you ever use your smartphone or tablet while in-store for shopping related purposes?



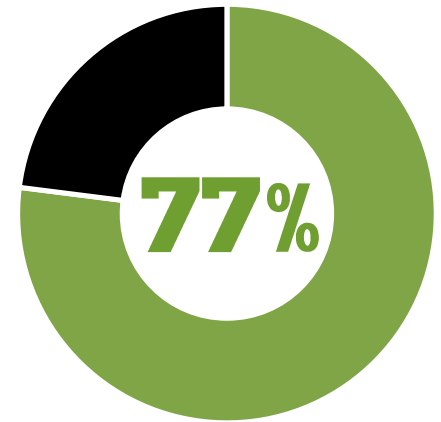
■ Yes ■ No

Mobile Moms



■ Yes ■ No

Mobile
Millennials



■ Yes ■ No

Mobile Men

2. Mobile as the sales clerk: Majority of Canadians expect to use their mobile devices more often while they shop in-store.

Are you using your smartphone in-store more often, less often, or the same as last year?



■ Less often ■ The same ■ More often

(Base: Shoppers who used their smartphone/tablet in-store for a shopping-related purpose)

% More Often



62%



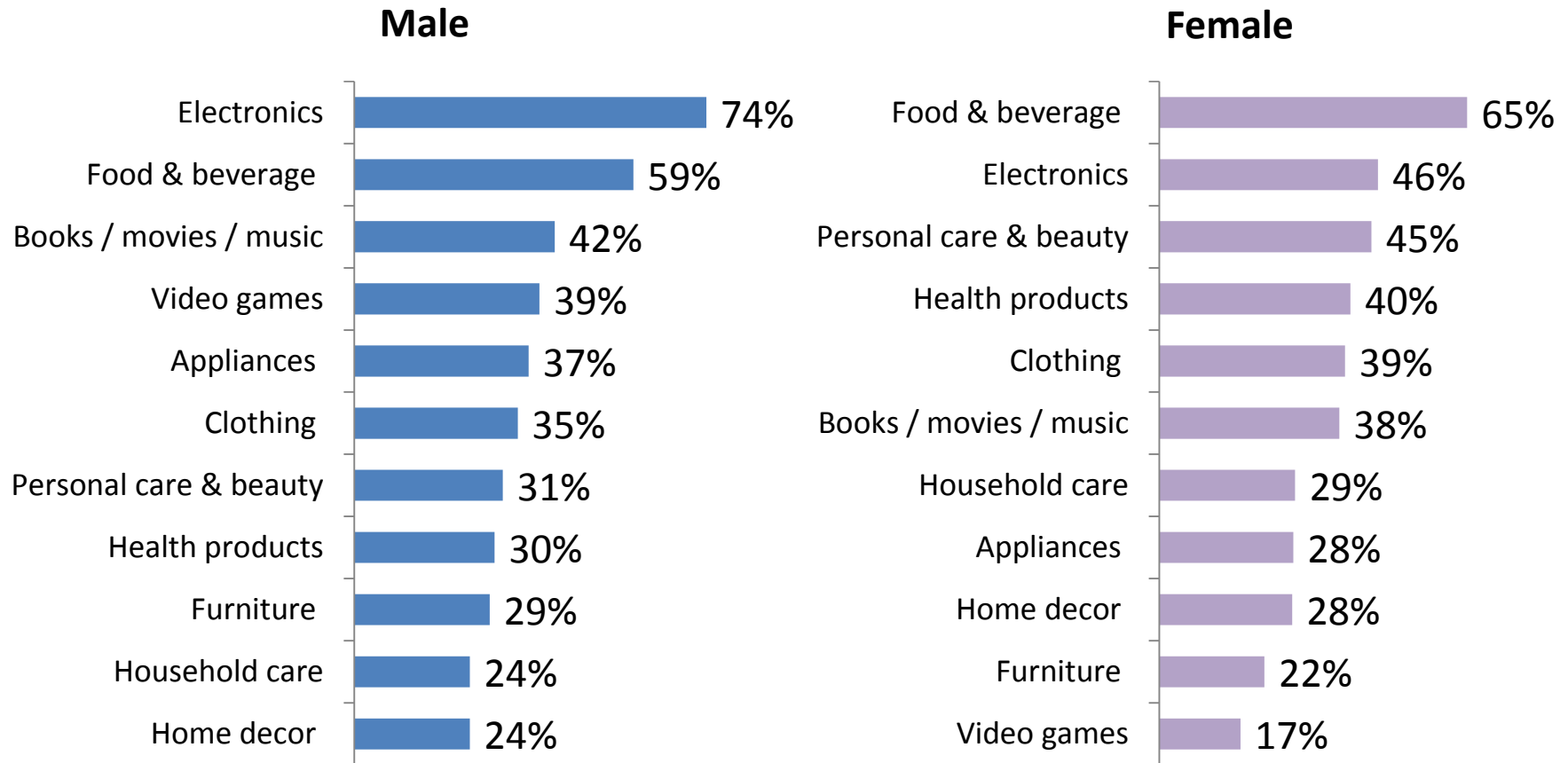
60%



58%

2. Mobile as the sales clerk: Mobile is used often in large categories with lots of choice and competition.

Have you used your smartphone to assist your in-store shopping for any of the following types of products?



(Base: Shoppers who used their smartphone/tablet in-store for a shopping-related purpose)

3. Mobile as means of discovery: It is all about finding a great deal.

3. It is All About Finding a Great Deal: Consumers use their phones to find deals.

Why are you using your smartphone more often in-store?

Most Frequently Cited Reasons	Rank
Price-comparing across different retailers	1
Checking for coupons	2
Looking up product reviews	3
Convenience and ease of use	4
Accessing deals and promotions	5

"I take pictures of items and send them to my family for approval so I can buy them."

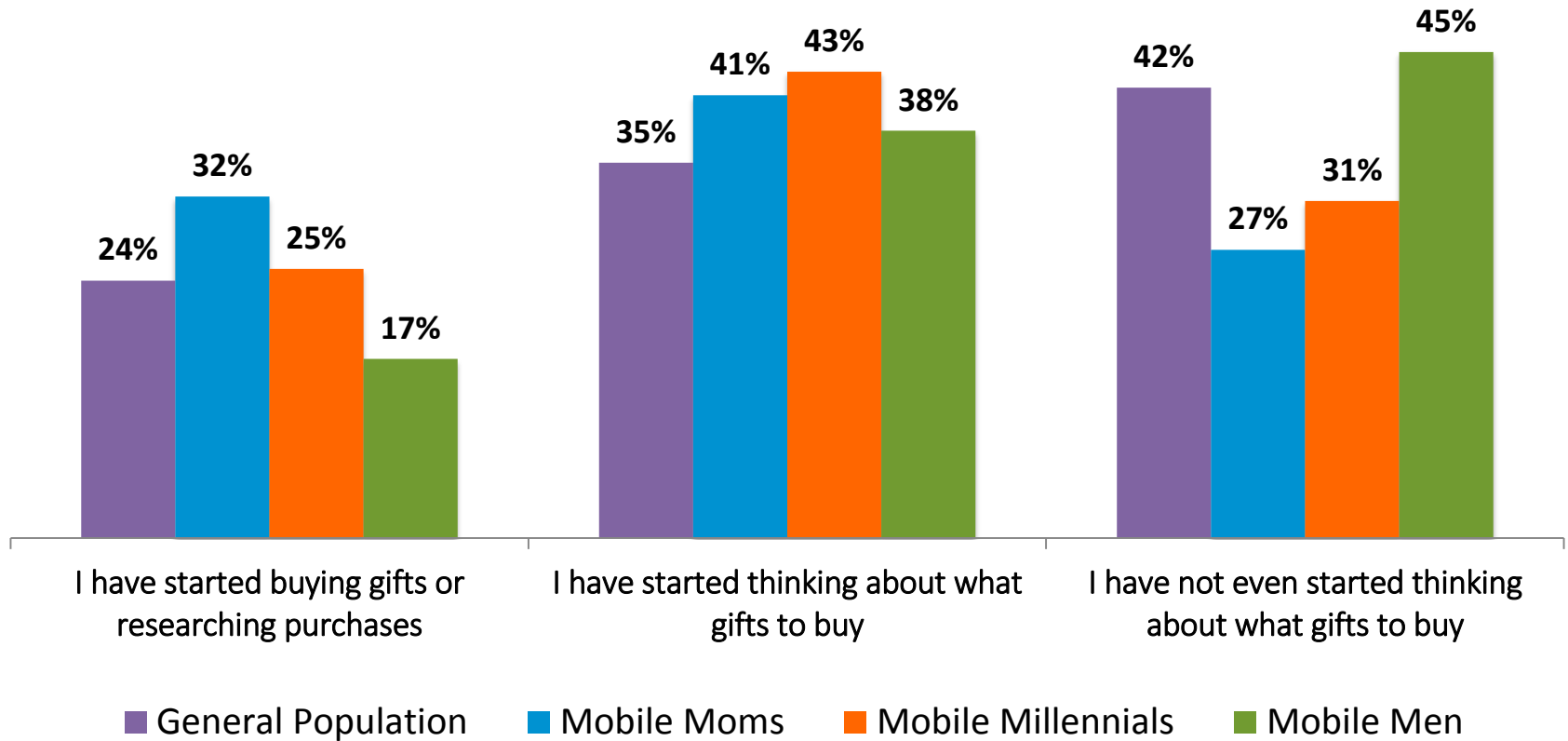
"Because I now have a Smartphone. I didn't have one last year."

"[There are] more apps related to shopping in-store that are relevant now vs. past."

4. Retailers and Brands have time to win over the holiday shopper, but must leverage mobile to do so.

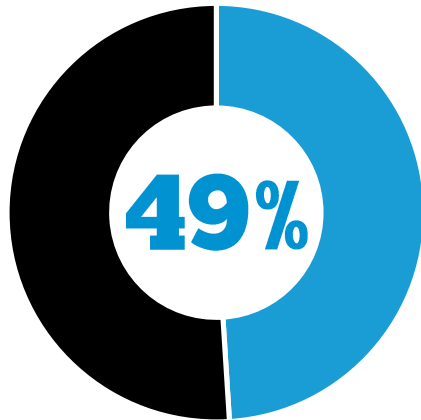
4. Stores still have time to win over holiday shoppers: Most consumers just starting to think about the holidays.

Which of the following best describes your current situation as it relates to shopping for the upcoming holiday season?



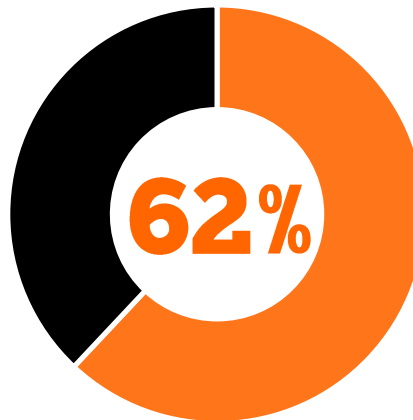
4. Winning Over Holiday Shoppers: Most consumers expect to use their devices while shopping this holiday season.

Have you used your smartphone or tablet in any way that has helped with your holiday shopping?



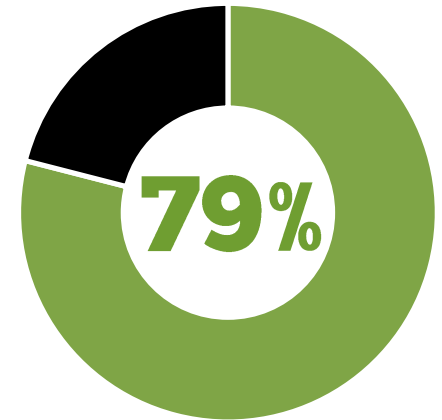
■ Yes ■ No

Mobile Moms



■ Yes ■ No

Mobile
Millennials



■ Yes ■ No

Mobile Men

5. Mobile is a key piece of the consumer journey.

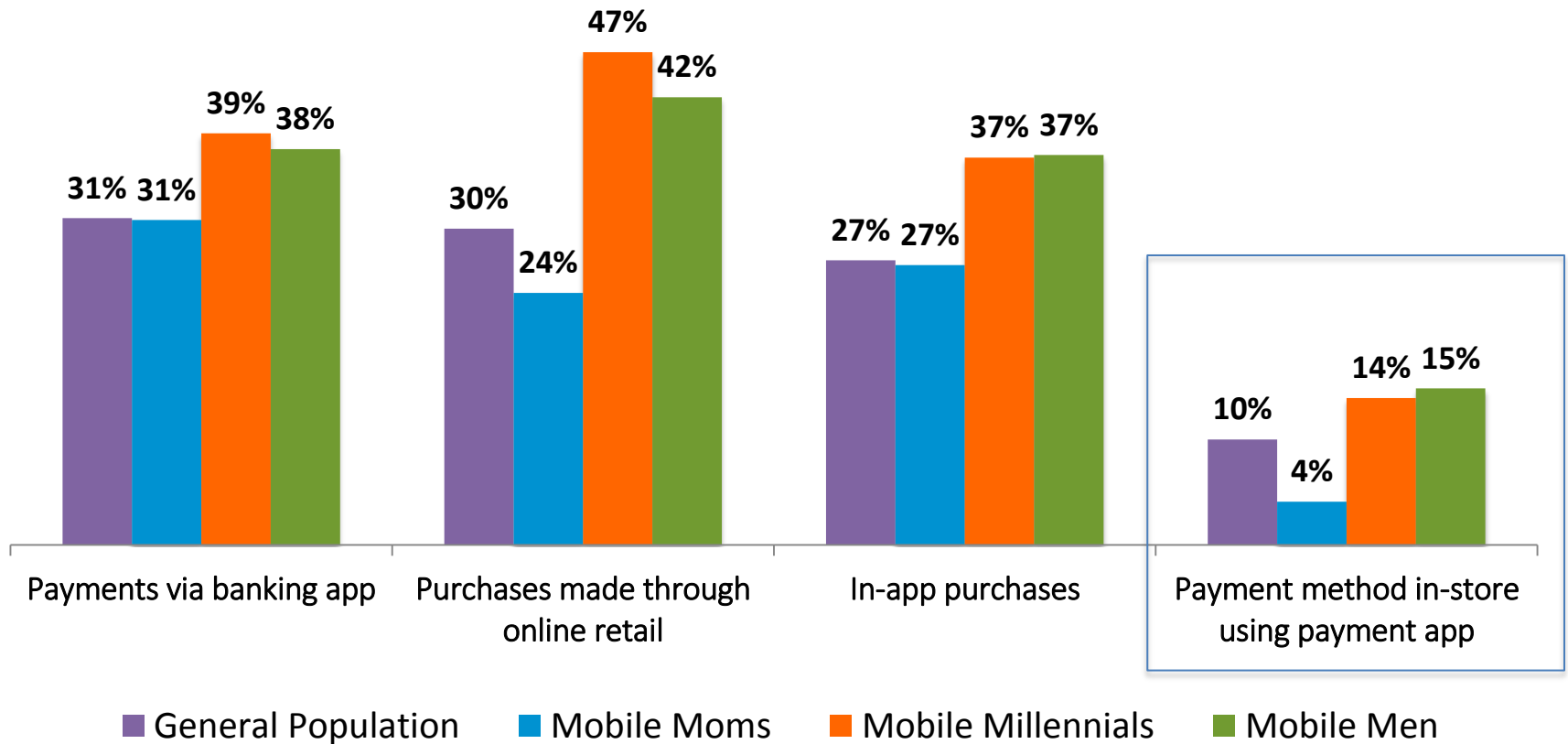
5. Consumer Journey: Smartphones are used frequently as consumers move through the purchase funnel.

Do you anticipate using your smartphone in any of the following ways while holiday shopping this year?	
Check competitors pricing to decide where to buy	61%
Take pictures of products being considered	60%
Research product features to confirm purchase decision	55%
Check competitive pricing in order to take advantage of price match guarantees	51%
Lookup consumer product reviews	46%
Check digital flyers/circulars to compare promotions	44%
Search for retailer or manufacturer coupons	42%
Entertain myself while waiting in long checkout lines	38%
Review similar products available elsewhere before deciding purchase	36%
Lookup expert product reviews	28%
Get input from friends or family via social media	20%

6. In Canada, mobile payments have a long way to go.

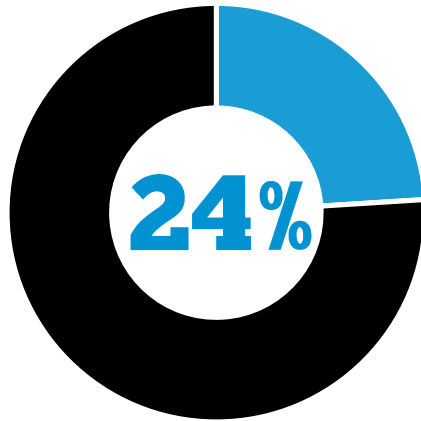
6. Mobile Payments Have a Long Way To Go: Minority of Canadians are using their phones to make payments.

Have you ever used your smartphone to make payments or purchases in any of the following ways?



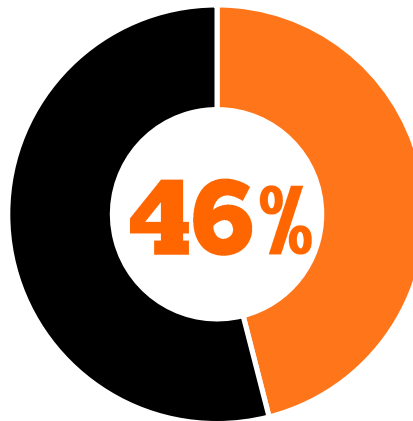
6. Mobile Payments Have a Long Way To Go: Mobile Millennials and Men feel significantly more secure about using their smartphones as in-store payment devices.

Would you feel secure using your smartphone to make payments in place of your credit card?



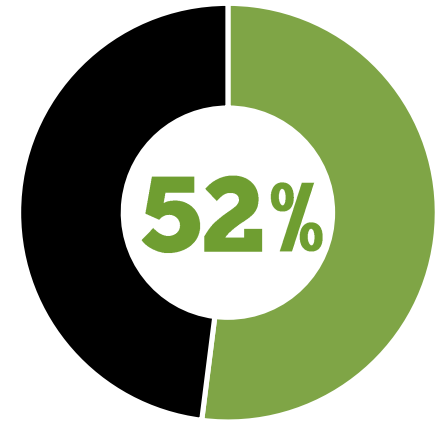
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Mobile Moms



■ Yes ■ No

Mobile Millennials



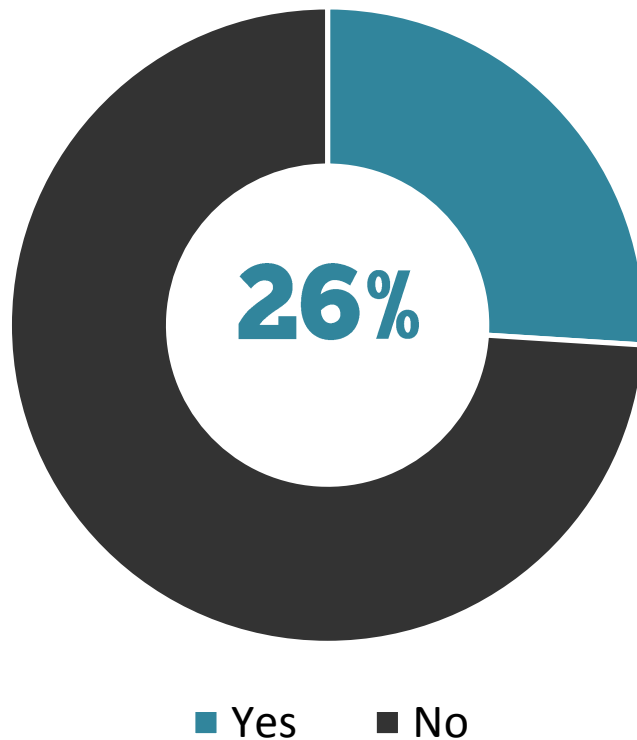
■ Yes ■ No

Mobile Men

7. Winning the Mobile Payments Race – too early to pick a winner.

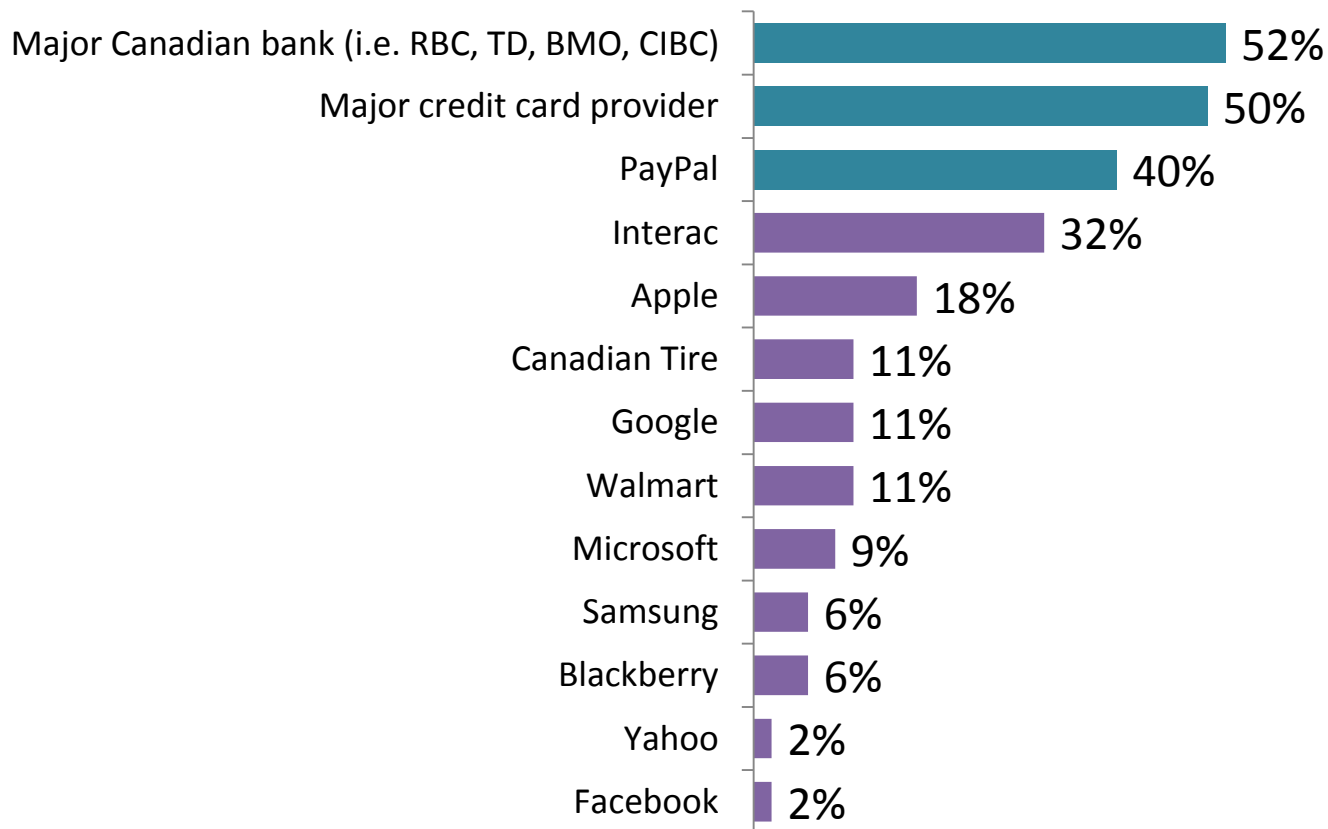
7. Winning the Mobile Payments Race: Mobile payment needs awareness and education before it becomes mainstream.

Are you aware of Apple's mobile payment system, Apple Pay?



7. Winning the Mobile Payments Race: Apple might make payments easier but Canadians trust their banks.

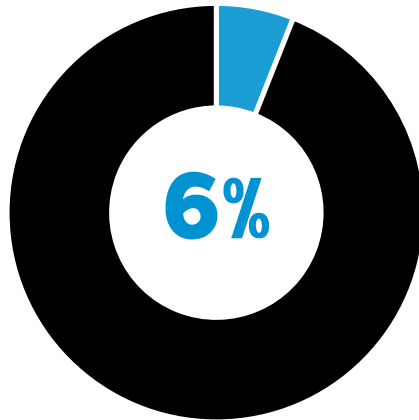
Which companies would you trust to provide a mobile payment system?



8. As of 2014, wearables are still niche, driven by health and fitness.

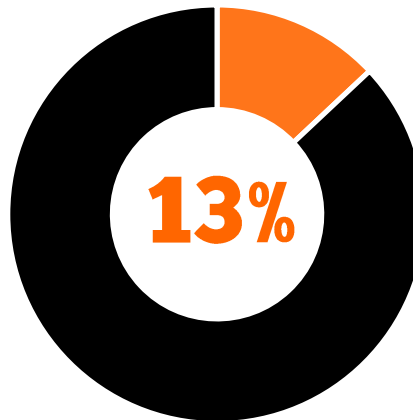
8. Wearables are still niche: Men and Millennials most likely to own.

Do you currently own a wireless-enabled wearable device, such as a smartwatch or an activity tracker?



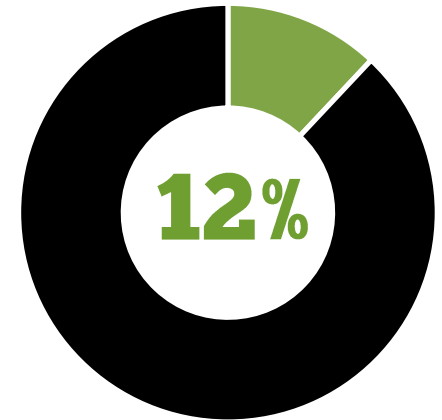
■ Yes ■ No

Mobile Moms



■ Yes ■ No

Mobile Millennials



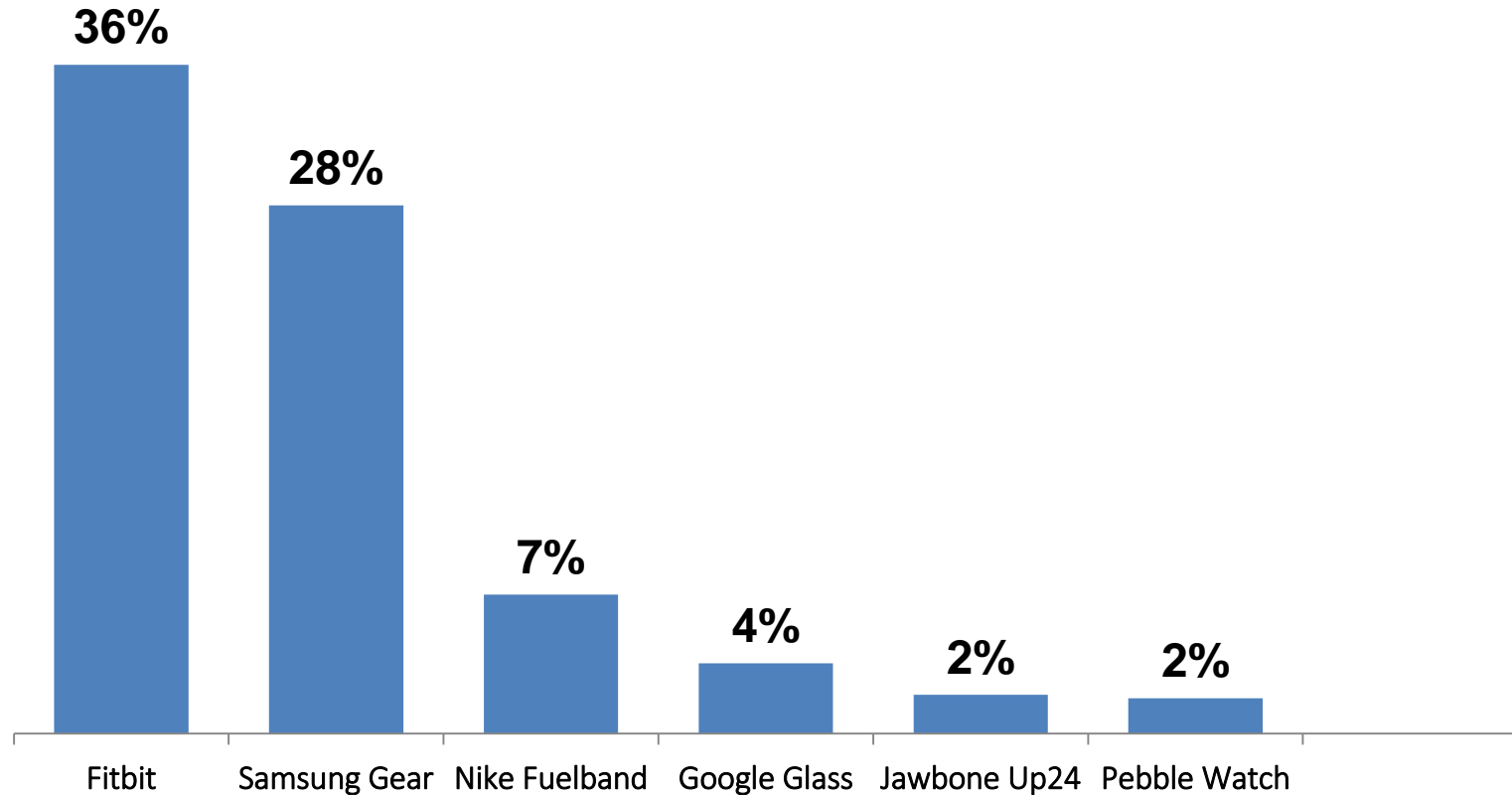
■ Yes ■ No

Mobile Men

11% among smartphone owners overall

8. Wearables are still niche, driven by health and fitness: Fitbit and Samsung Gear lead the way.

Which wireless-enabled wearable device do you own?

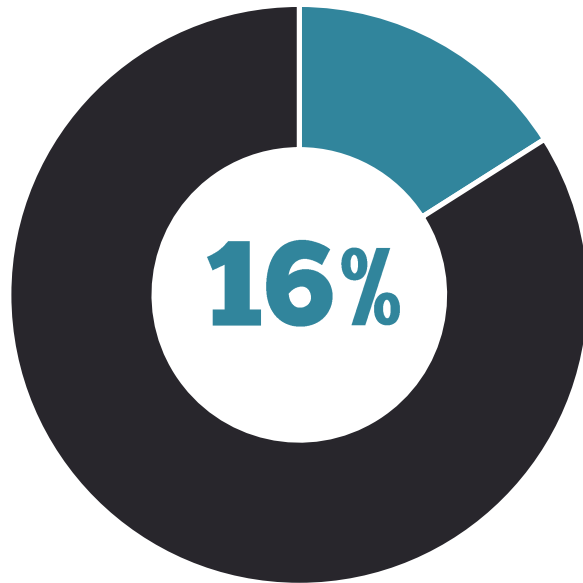


(Base: Smartphone owners)

9. Looking ahead to 2015, wearables poised for growth powered by Apple and Samsung.

9. Wearables in 2015: Set to double over holiday and into 2015 driven by self-purchase and gifting.

Do you plan on buying any wearable devices in the next 12 months for yourself?



■ Yes ■ No

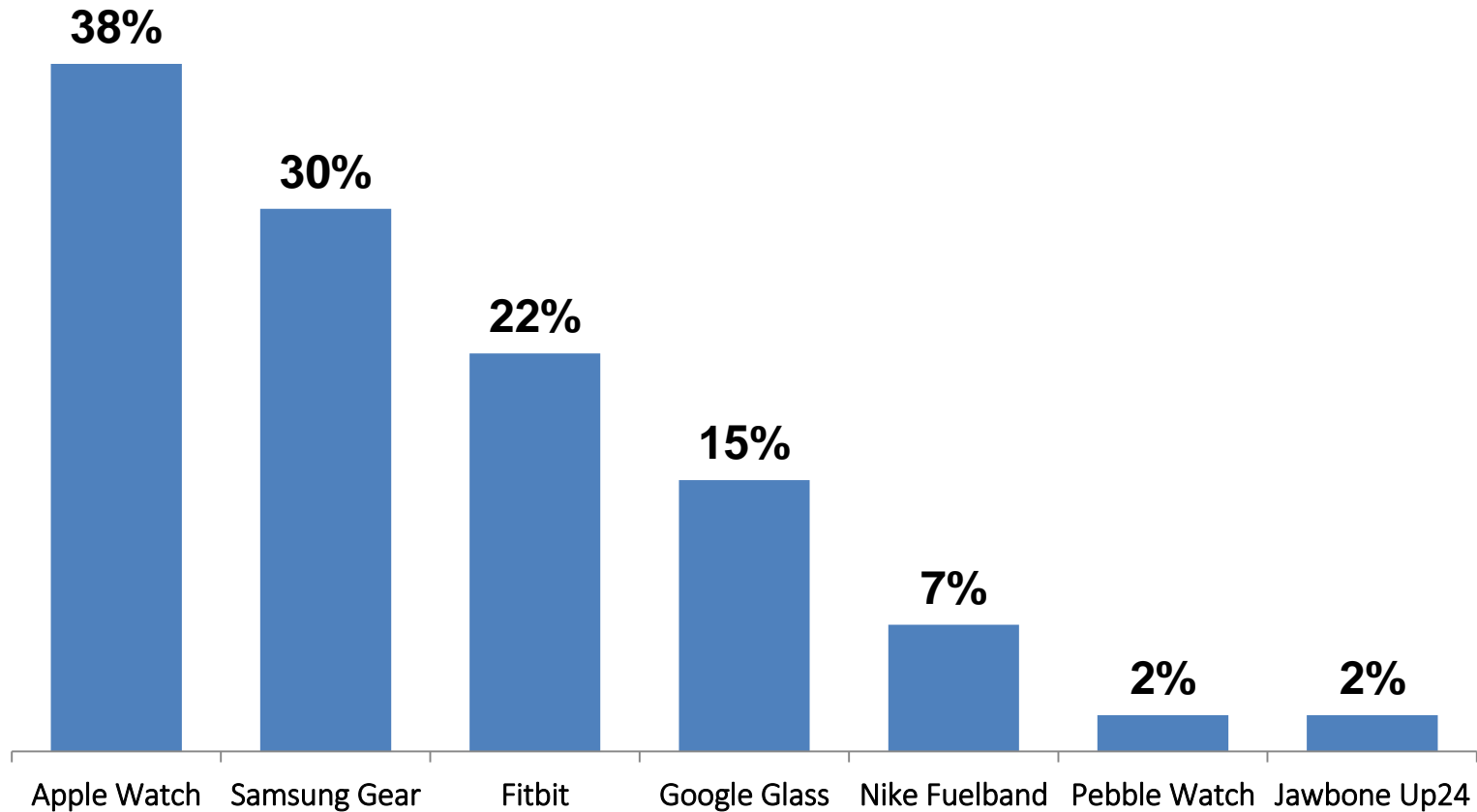
Are you planning to buy a wearable device as a gift for someone else this coming holiday season?



■ Yes ■ No

9. Wearables in 2015: Apple Watch is the most anticipated wearable, followed by Samsung Gear S.

Which wearable device(s) do you plan to buy?



(Base: Shoppers planning to purchase a wearable device)

10. Apple made a splash with the new iPhone and with its watch.

It is likely to be a hot item this holiday period.

10. APPLE: iPhone 6 will be the hot device this holiday season.

Are you aware of the products below?

How likely are you to buy any of these products if they are available?

	% Aware	% Definitely will/ Very Likely to Buy
iPhone 6	83%	14%
Apple Watch	60%	5%
Samsung S5	59%	7%
Samsung Galaxy Note 4	55%	6%
Samsung Gear S	27%	3%

Mobile Personas Top 10

1. It's a two horse race – between operating systems.
2. Retailers need to find ways to provide value as mobile is the go-to sales clerk
3. Mobile as means of discovery: It is all about finding a great deal.
4. Retailers and Brands have time to win over the holiday shopper, but must leverage mobile to do so.
5. Mobile is a key piece of the consumer journey.

Mobile Personas Top 10

6. In Canada, mobile payments have a long way to go.
7. Winning the Mobile Payments Race – too early to pick a winner.
8. As of 2014, wearables are still niche, driven by health and fitness.
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10. Apple made a splash with the new iPhone and with its watch.



**HOLIDAY SHOPPING &
NEW MOBILE TECH INSIGHTS
REPORT**

A FREE Gift to you

Access Mobile Personas with Custom Questions

BENEFITS

Uncover proprietary insights about your brand or product

Connect your proprietary questions to extensive mobile and shopper insights

Gain access to a large sample size at a fraction of the cost compared to a custom study

LEVERAGE CUSTOM ACCESS TO



Gain deeper insight into your target segments, including your own custom segmentation.



Profile your brand users and those of your competitors.



Gauge the impact of marketing activities.



Measure brand KPI's.



Generate fact-based support for sales and marketing initiatives.

2015 Study Details



- Deadline to submit custom questions: October 17th, 2014
 - 1 question: \$1600
 - 2 questions: \$2800
 - 5 questions: \$7000
- 2015 Pricing: \$9,500 CDN
 - Pre-buy the study before October 17th, get 2 FREE proprietary questions.

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