

iab.

on device
research

*Understanding the
MCommerce market place.*

October 2016



75% have purchased via their
smartphone over the past 6 months globally and
80% in Ireland

... and this is a global phenomenon



Please note: APCA = All Participating Countries' Average

Base: All Participating Countries' Average(3800), per market (200) , male (2286), female (1514)

▲▼ Significantly higher/lower. Tested at 95% confidence interval



No wonder then that global mobile ad spend was ...

↑ 1.5x

in 2015 growing 68% yoy

On Device Research

We use mobile to help brands and their agencies measure marketing effectiveness and understand consumer interactions

- Office in London, Singapore and Dubai
- First to measure in-app advertising using device IDs
- 35 million mobile surveys in 92 countries, for clients such as:

The logo for Procter & Gamble, featuring the letters 'P&G' in a bold, blue, serif font.The Samsung logo, consisting of the word 'SAMSUNG' in white, uppercase, sans-serif letters inside a blue oval.The Unilever logo, featuring a large, stylized 'U' filled with intricate blue patterns, with the word 'Unilever' in a blue, cursive font below it.

Research Methodology

Method:

- 22 question mobile survey was designed and fielded in 19 markets

Sample Target:

- N=200 per market
- N=3800 in total

Fieldwork Period:

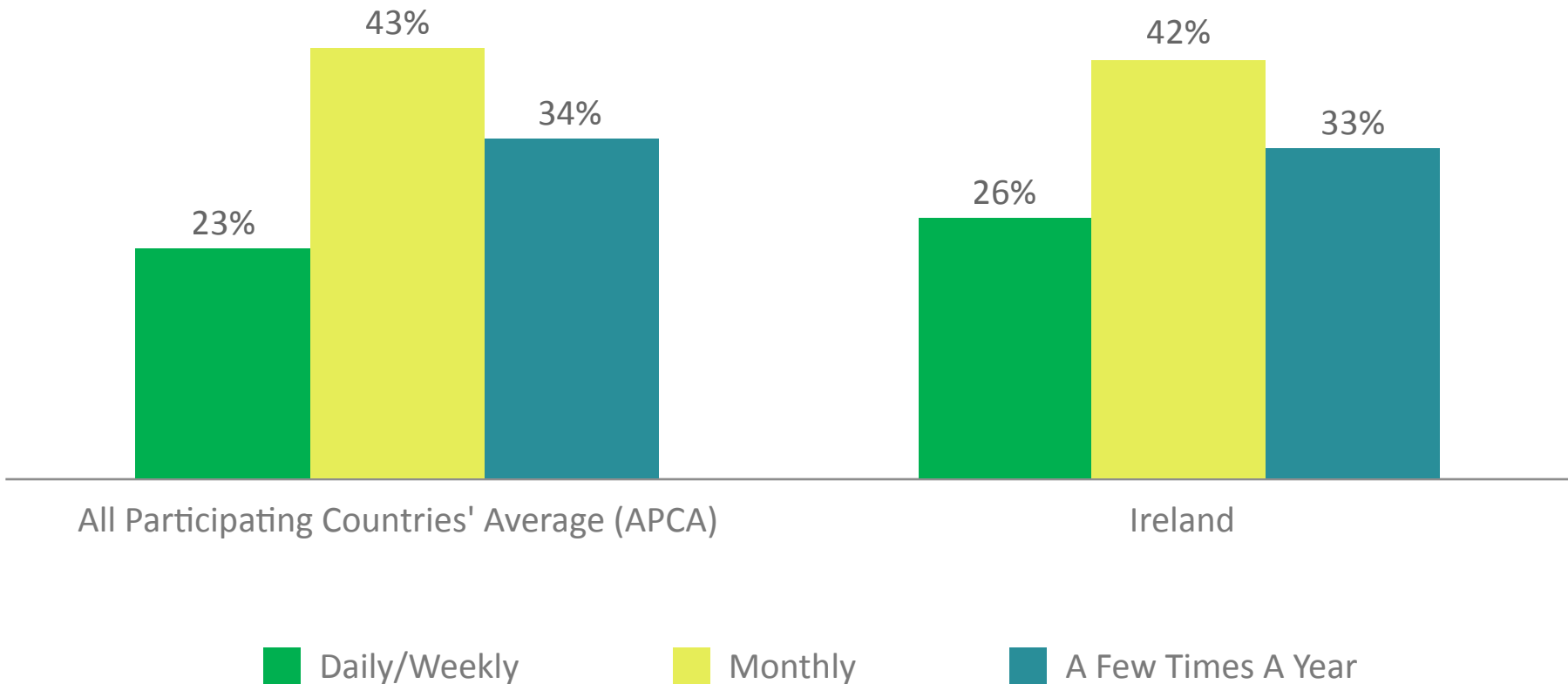
August 2016



Mobile commerce is not sporadic, it is part of consumers daily lives

68% purchase on a monthly basis in Ireland

Frequency of mobile commerce



Please note: APCA = All Participating Countries' Average

Base: All Participating Countries' Average APCA (3800), regional: Europe (1400), North America (600), South America (800), APAC (1000)

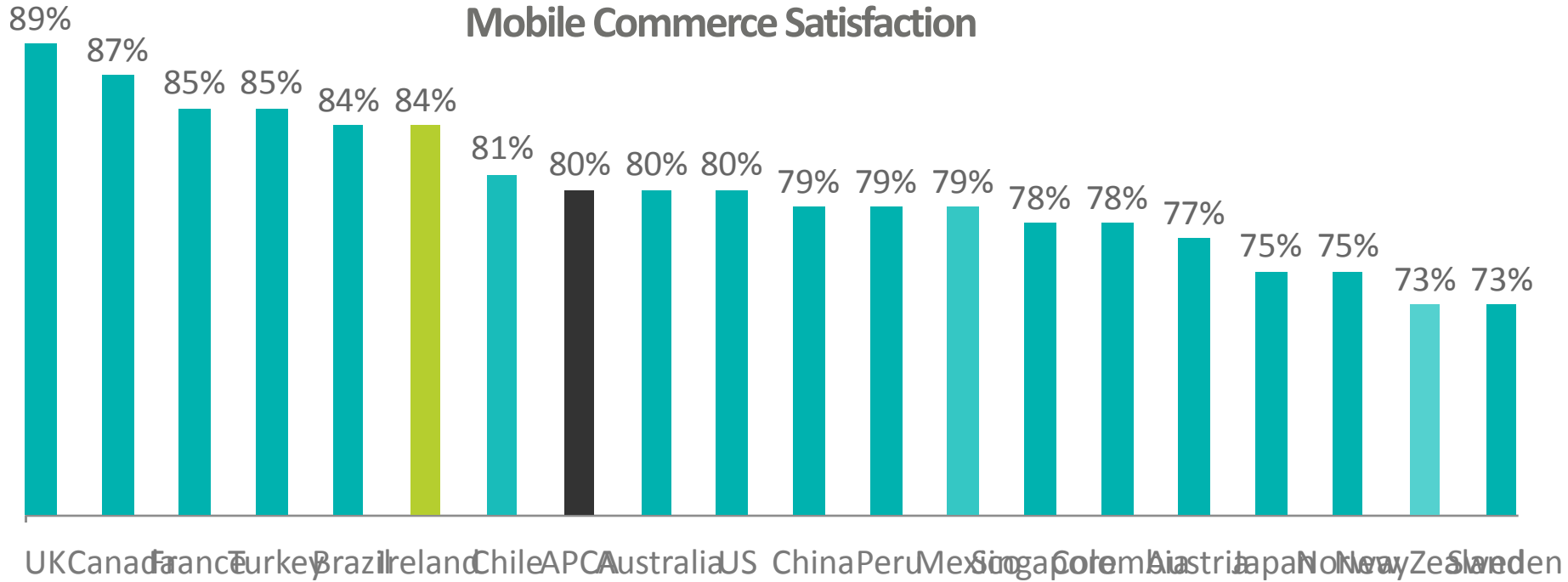
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84% are satisfied with their
mobile purchase experience in Ireland

This is above the global average of 80% for mobile commerce satisfaction

Mobile Commerce Satisfaction



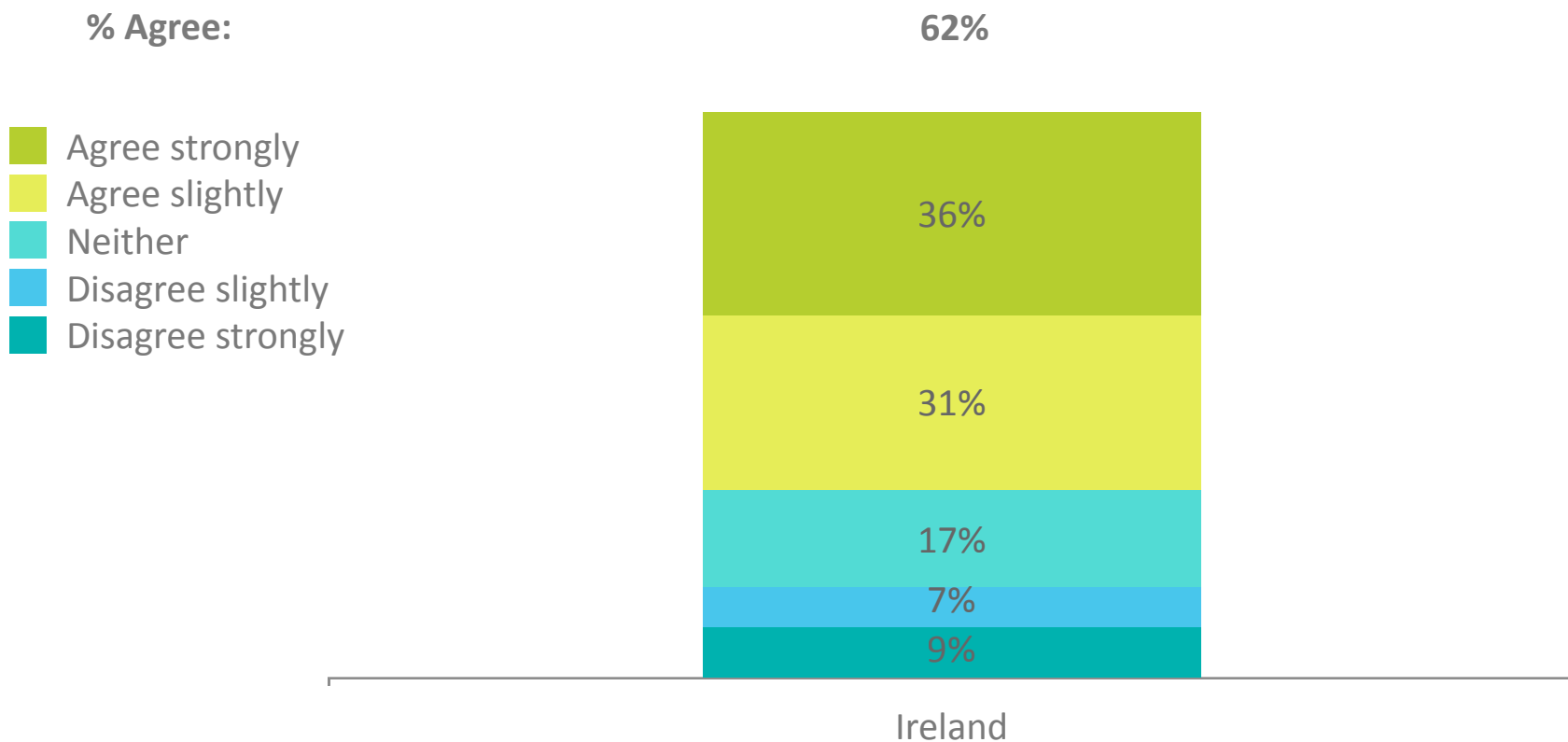
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As a result of their satisfaction, 62% plan to purchase more products or services via their device in the next 6 months.



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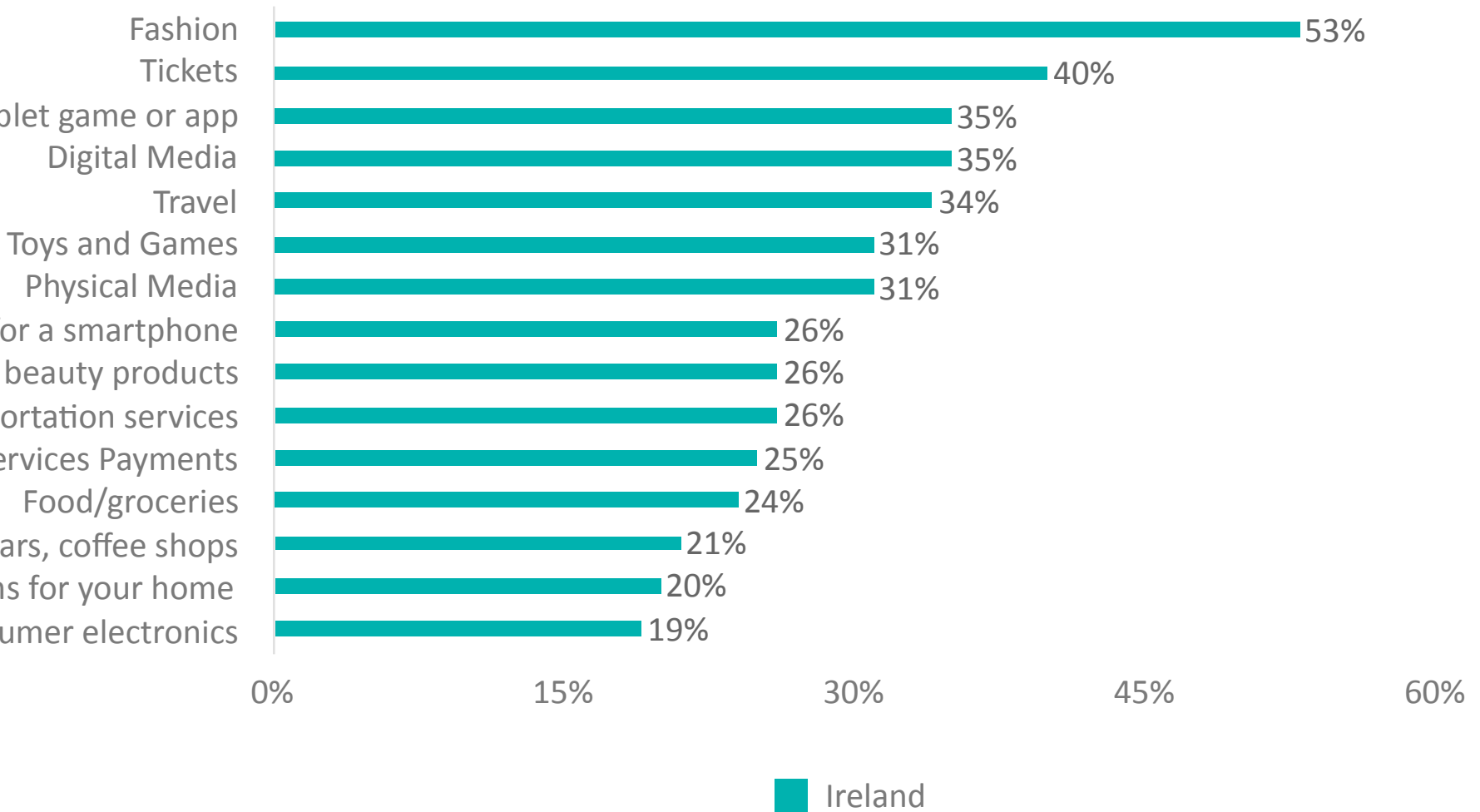
Base: All Participating Countries' Average(3800), per market (200)

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What is the top category of item purchased via mobile?

Mobile Commerce Categories



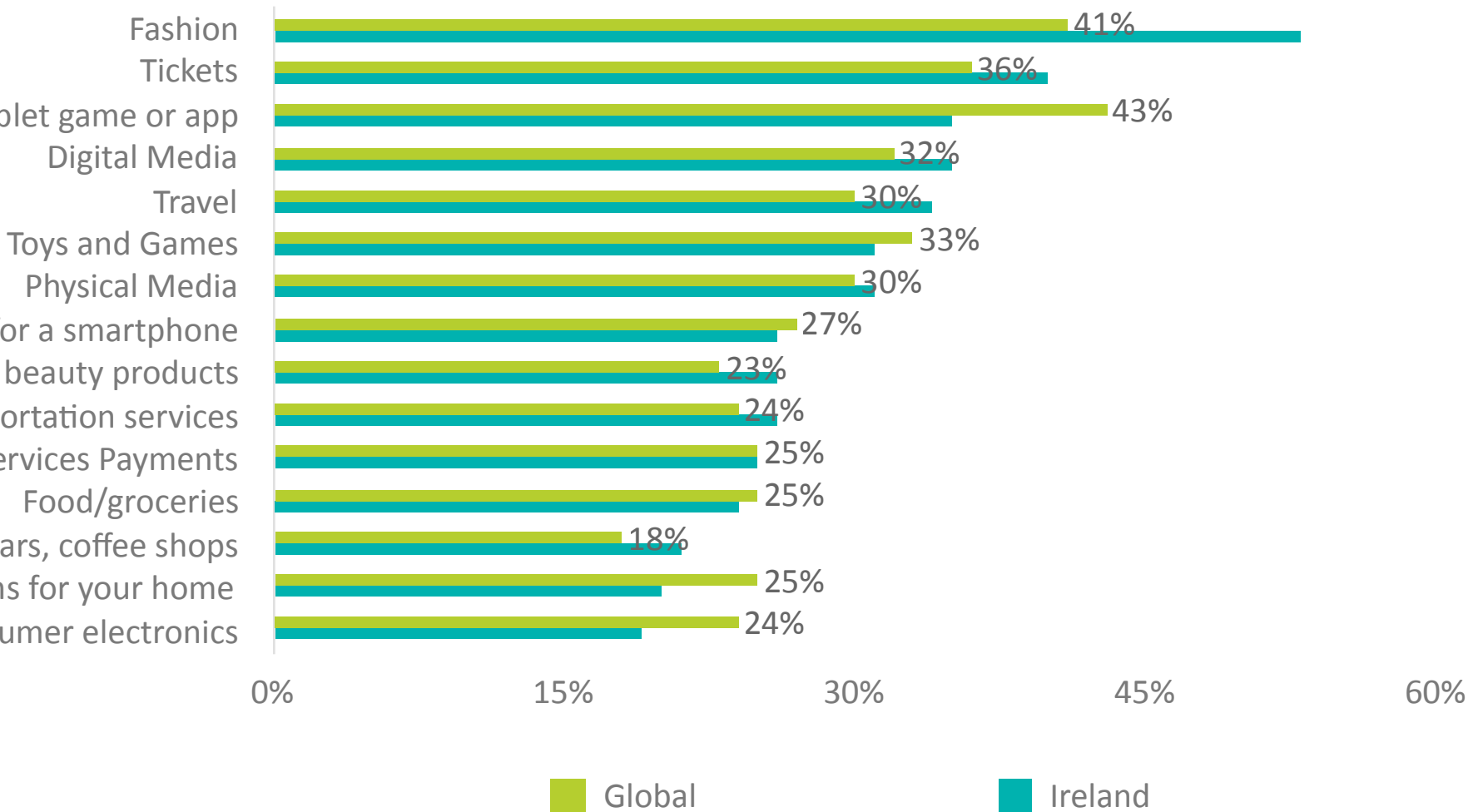
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Mobile Commerce Categories



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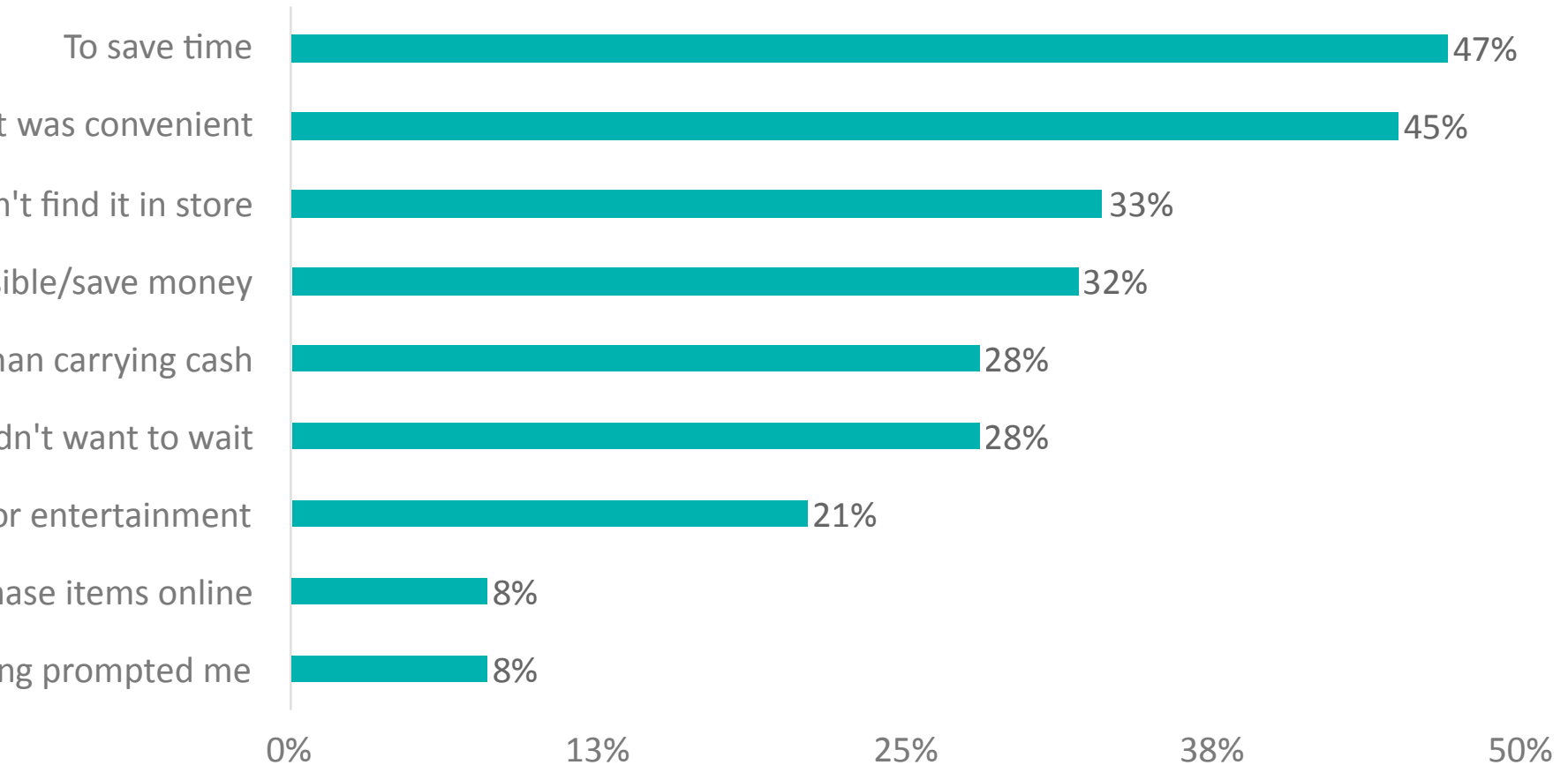
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Mobile commerce makes life easier

Motivations for Mobile Commerce - Ireland



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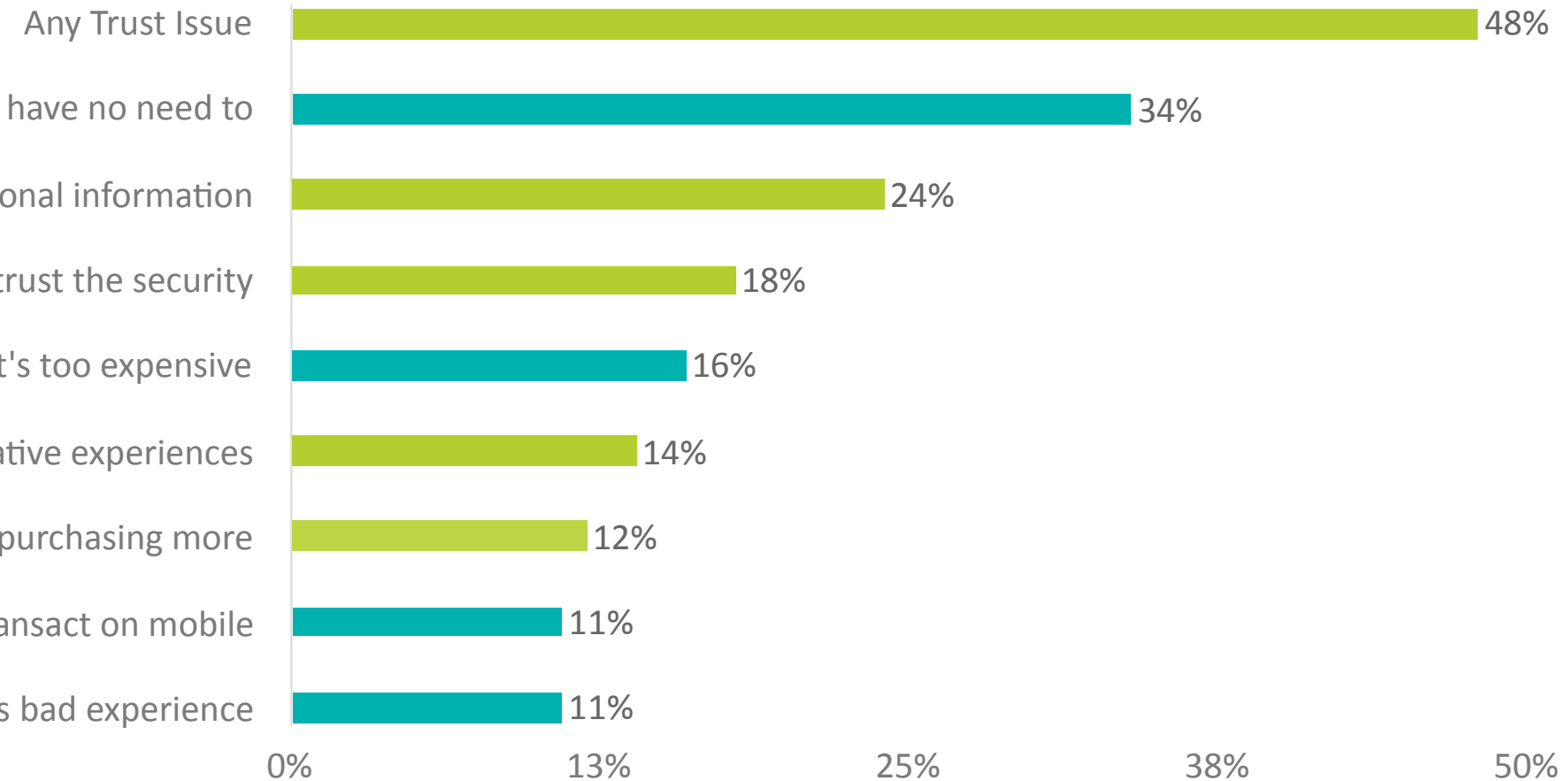
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Trust issues a barrier to more adoption stated by 48% in Ireland

Barriers to increased purchase



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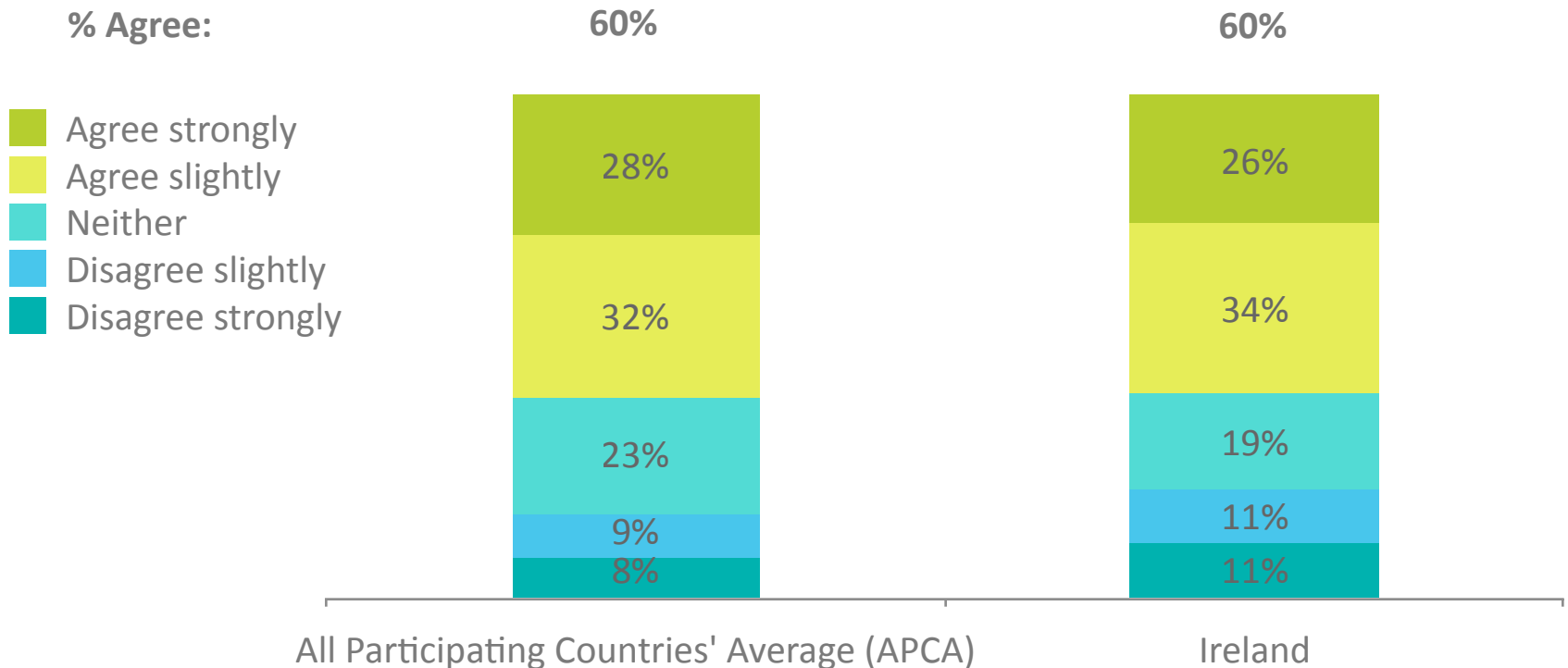
81% of consumers in Ireland have

interacted with a mobile ad and 18% have gone on to purchase thereafter



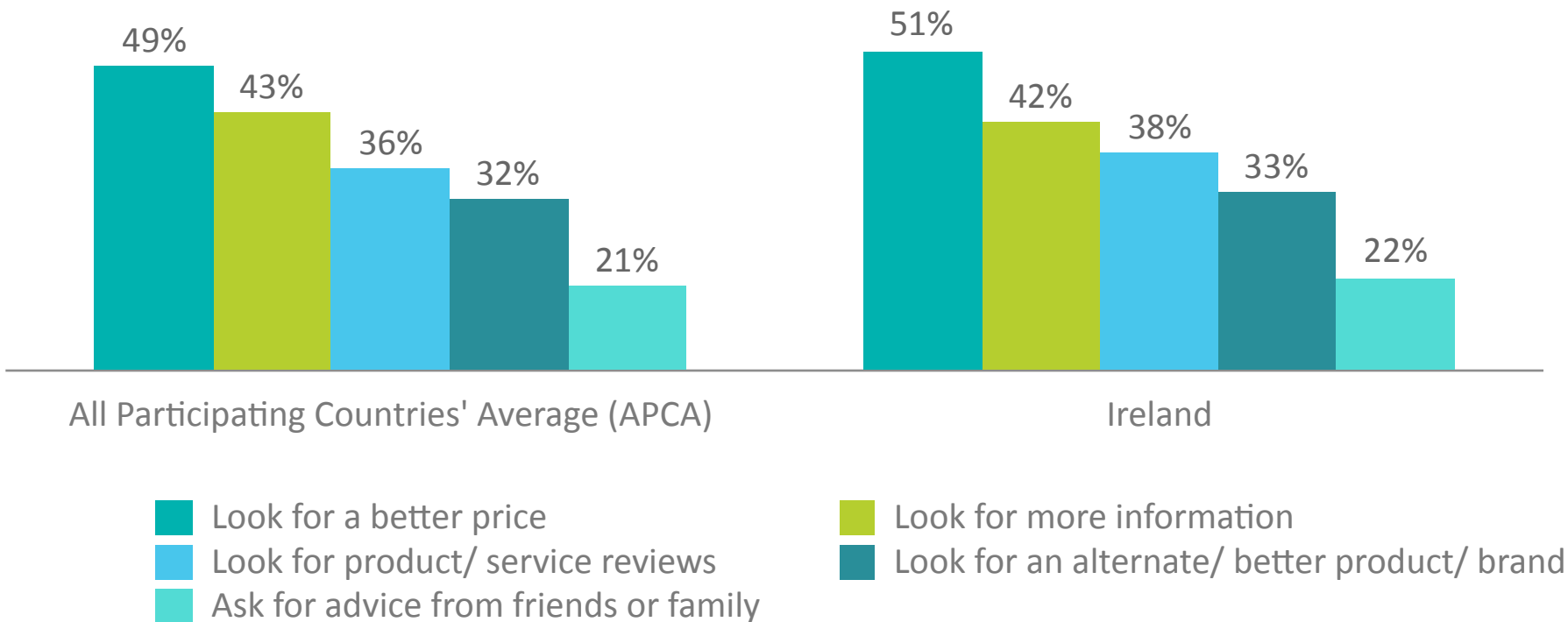
60% have found a new product or service to buy via social media

To what extent do you agree with the following statements? I often discover new products or services to buy on social media

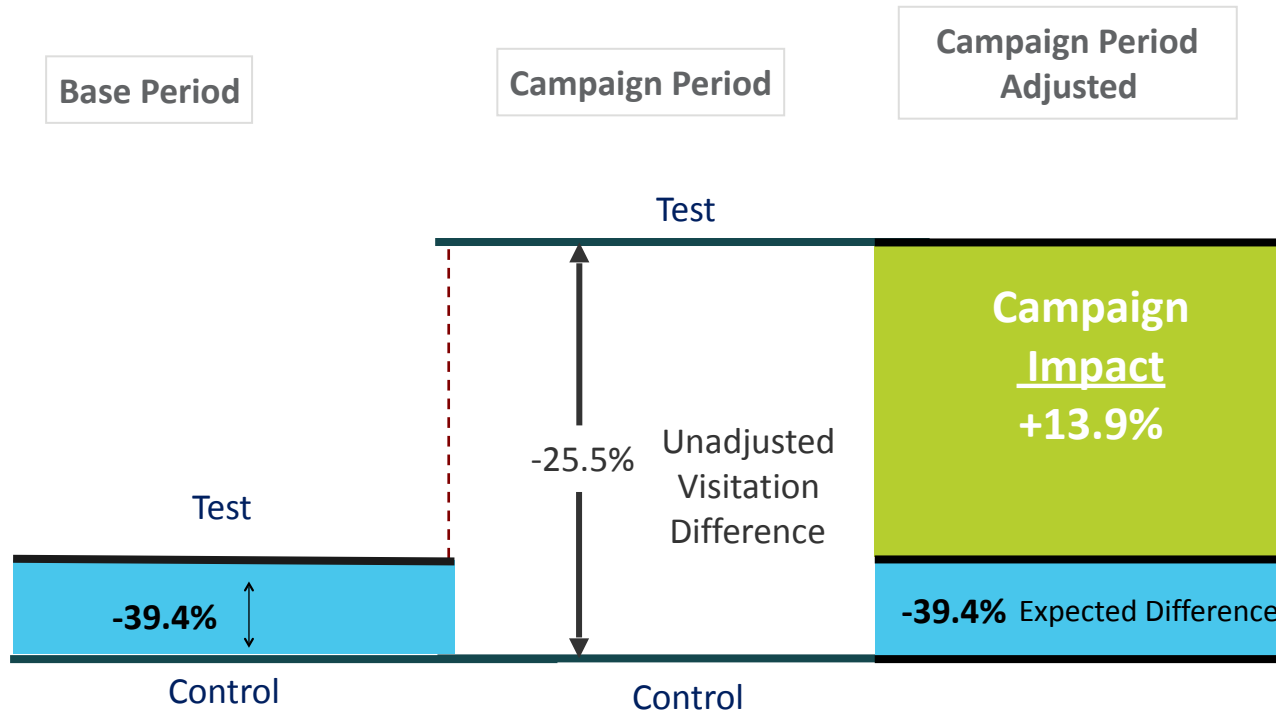


Consumers use their devices to showroom when in store. 49% do so by looking for a better price, 43% to look for more information.

Q20. Which of the following do you regularly do in store with your smartphone or tablet? Select all that apply.



On Device Research store visitation product proves mobile ads drive footfall. E.g. 45.2% Increase in Store Visitation





Mobile Advertising Norms – Brand Metrics

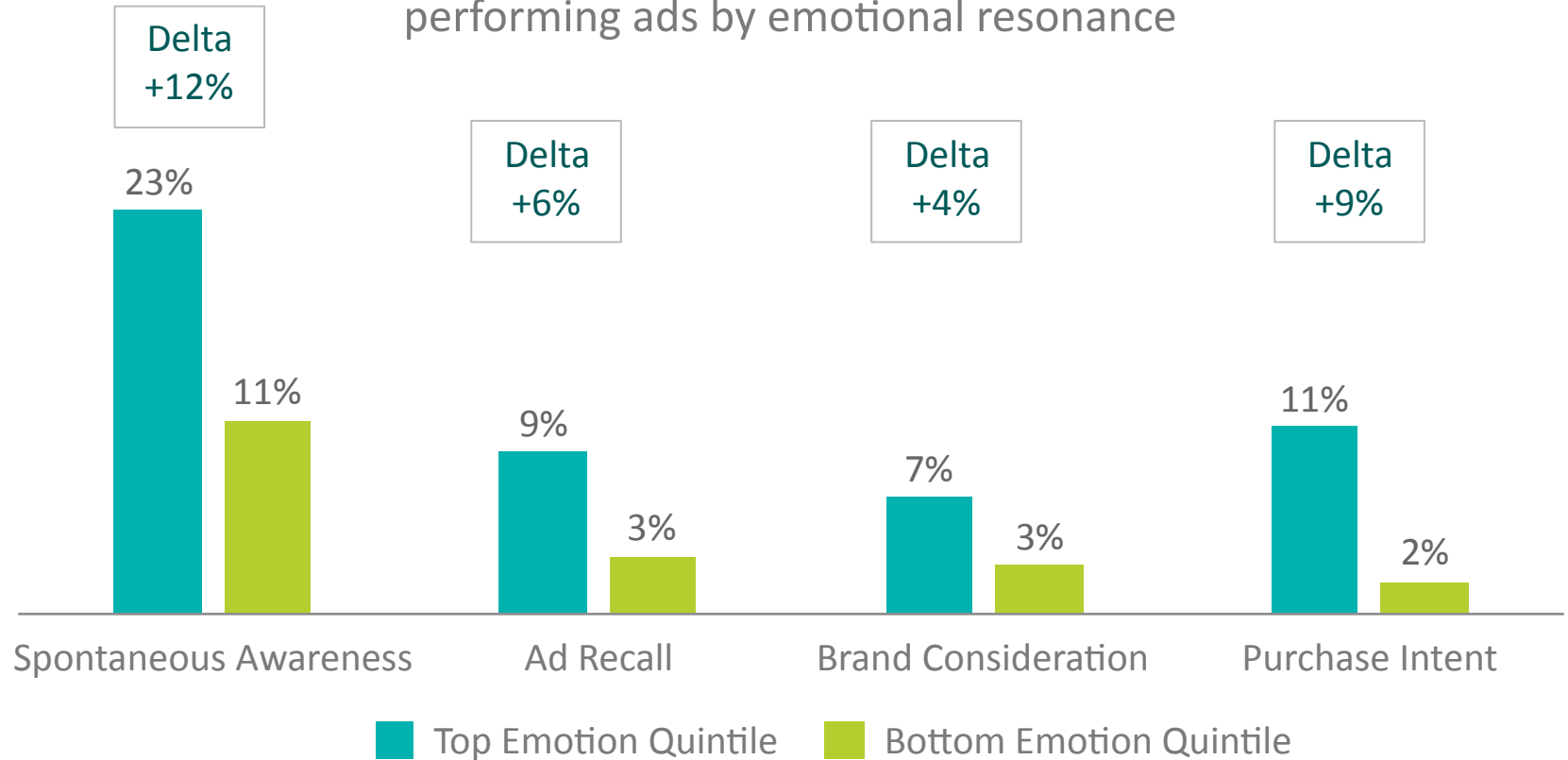


Delta Difference

Spontaneous Awareness- 1 st mention	+10
Spontaneous Awareness- Total	+16
Ad Recall	+9
Brand Consideration (Top 3)	+4
Purchase Intention (Top 2)	+6

Mobile creative has a huge impact on effectiveness

The impact of emotion in mobile advertising on brand metrics
Average % delta between control and exposed groups: top vs bottom performing ads by emotional resonance



Summary

- 80% of smartphone owners in Ireland purchase on their smartphone, and their purchasing is set to increase
- Convenience is the major motivation
- Mobile advertising works at all stages of the purchase funnel, but don't forget the power of good creative

Thank you!

