

How Mobile Has Redefined the Consumer Decision Journey for Shoppers

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When people shop, their smartphone is now their go-to advisor and assistant. For retailers, this means big opportunities to be there and be useful in shoppers' micro-moments. Here, we reveal the mobile retail trends shaping the industry and why they matter.

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If we took a snapshot of the shopping experience a decade ago, it would look something like this: When looking for ideas and inspiration, a shopper would either go online, browse a catalog, or walk the store aisles. When in-store, a shopper would learn more about a product and either head to the cashier or head home to buy online. The point is that a shopper interacted with channels independently. But the rise of mobile has changed this picture.

What's different today is that even though this behavior still happens, shoppers are omni-channel: Six in 10 internet users start shopping on one device but continue or finish on a different one,¹ and 82% of smartphone users say they consult their phones on purchases they're about to make in a store.² They get ideas, look up information, and make decisions, all from their smartphone anytime, anywhere.

How consumer behavior on mobile is shaping retail industry trends

Consider this: Foot traffic in retail stores has declined by 57% in the past five years,³ but the value of every visit has nearly tripled.⁴

What's happening? Mobile is driving local.

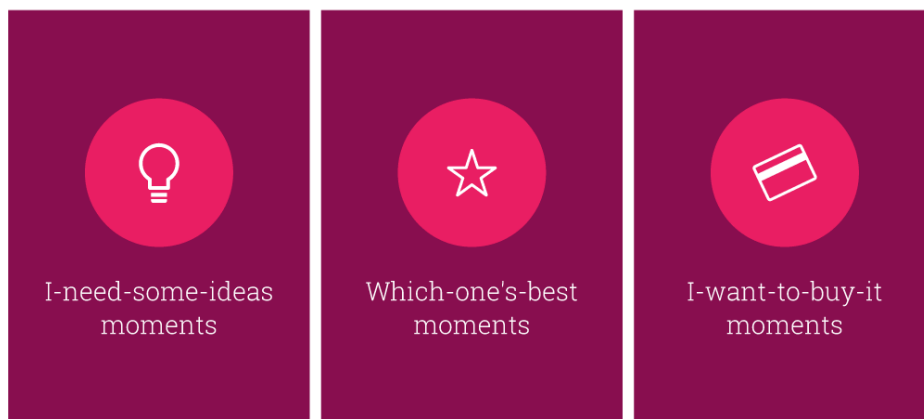
People use their smartphones before heading in-store—to gather ideas, research products, and then search for local information. It's no wonder that searches for “near me” have doubled in the past year.⁵

But research isn't the only way mobile is changing the shopping experience. Shoppers buy on mobile, too. A person today might make a buying decision about a \$15 tube of sunscreen, a \$300 camera, or a \$3,000 handbag on a smartphone while on her commute to work, as she walks the dog, or waits to pick up her son in the carpool line. Time on site for mobile users in the U.S. is down 5% year over year,⁶ however retail's share of online purchases is still growing. Thirty-four percent of online

retail purchases now happen on mobile devices.⁷

The bottom line: In this mobile-fueled shopping landscape, the retailers that thrive see the opportunity to be there and be useful for shoppers in what we call [micro-moments](#)—those intent-rich moments when people turn to their smartphones or other devices to know, go, do, or buy something.

Retail Moments That Matter



The retail moments that matter

Shopping micro-moments often start when people have a need or desire to purchase a product and they begin thinking of ideas. This leads to research and eventually purchase. These moments tend to fall into one of three categories:

- **I-need-some-ideas moments** happen when people have general awareness of the product category they're interested in, such as living room furniture, but they haven't yet narrowed down their choices to an exact product.
- **Which-one's-best moments**—a.k.a. consideration moments—happen when people turn to their phones in short bursts of activity to compare prices, brands and specs, and read product reviews from

trusted sources.

- **I-want-to-buy-it moments** happen when the research is done and it's decision time. People make a choice about which brand or retailer to buy from, and whether to buy online or in-store.

With these moments in mind, how can you ensure that you're there for shoppers?

The first steps to being there and being useful

What micro-moments mean for retailers is this: It's less important for a shopper to be present in-store than for the store to be present wherever and whenever a shopper needs them. You've got to figure out new ways to show up with helpful information when those moments occur, whether it's 2 p.m. or 2 a.m. There are two ways to do this:

- **Be there:** Identify the most important micro-moments and commit to [being there](#), whenever and wherever a shopper is searching, especially on mobile.
- **Be useful:** In a consumer's moment of need, meet them by providing [valuable information](#)—whether it's product reviews, video tutorials, or the ability to purchase right away.

The first step in being there and being useful is understanding and acting on shoppers' **intent** and their **context**. Intent is what the shopper wants in any given moment (Is she looking to browse or to buy?), while context includes her location and the device she's using.

If you marry intent and context with what you already know about your shopper (Has she visited your site in the past? Is she a loyal customer?), you can start being there and being useful in the right moments.

By [targeting on demographics alone](#), you may miss out on valuable consumers who may be in market at that moment. Consider this example: If you sell car seats and you target moms alone, you'd be missing out on relatives or friends who might be in the market to buy a car seat as a baby shower gift. You may also be wasting marketing dollars by targeting moms who already own a car seat or women without children.

It's less important for a shopper to be present in-store than for the store to be present wherever and whenever a shopper needs them.

Let's look at one retailer that has put intent and context [at the center of its shopper experience](#). **Target** saw that 98% of its guests were shopping digitally and that 75% were starting on mobile. But in categories like patio furniture, its in-store and online teams were still operating and marketing separately, even as more than 50% of their sales in the patio category were coming through Target.com.

The company looked at it from its customers' point of view. Guests might search on smartphones for patio furniture, then see completely different merchandise when they came into their local store. So Target merged its online and offline marketing and merchandising teams into a single unified patio team that was mobile-first. It decided what products and signage to feature in-store based on digital demand.

Target also ran Google local inventory ads to show customers on mobile the exact patio furniture that was available in the store nearest them. As a result, patio revenues in the stores in which Target made this change have been dramatically outpacing the stores in which the change has yet to be made.

In addition to understanding intent and context, it's crucial for retailers to

embrace the latest trends and engage with shoppers in new ways. In this article, we'll share:

- Consumer trends that define each of these retail micro-moments
- Snapshots of real shoppers' purchase journeys.
- Actions retail marketers can take to be there and be useful in each micro-moment.
- Success stories from retailers using micro-moments strategies.



How Shoppers Get Inspiration: Consumer Search Trends in I-Need-Some-Ideas Moments

Here, we dive into the micro-moments where shopping starts: I-need-some-ideas moments. We explore the consumer search trends shaping these moments, what they mean for retail marketers, and how some retailers are already capitalizing on these kinds of micro-moments.

think with **Google**

Sometimes shopping happens on impulse. But other times, there's a bit more thought that goes into deciding the perfect brand, product, or style—whether that's for a purchase as small as nail polish or as large as a sofa.

Let's say a young couple has been dreaming of a new kitchen. There are so many options for countertops, hardware, appliances--and more. Where do they start? Who carries styles in their price range? How do they know if it will all look good together? The same scenario could apply to apparel, electronics, or ... any retail category.

Source: Google/Ipsos,
Consumers in the
Micro-Moment, Wave
3, U.S., n=1,291 online
smartphone users 18+,
Aug. 2015.



90%

of smartphone users aren't absolutely sure of the specific brand they want to buy when they begin shopping.

In these I-need-some-ideas moments, people are at the early stages of thinking about what it is they want or need to buy; they're looking for ideas and inspiration. And in these [micro-moments](#), they're often turning to Google to explore their options and discover brands: Sixty-six percent of apparel smartphone shoppers turn to Google for ideas about what to buy.⁸

Most people aren't brand-committed in these top-of-funnel moments: Ninety percent of smartphone users say they aren't absolutely sure of the specific brand they want to buy when they begin shopping.⁹

This is prime opportunity for retail marketers to step in and bring their brand and products into the consideration set.

A real-life look at the consumer decision journey: a shopper's micro-moments

When it comes to shopping ideas and inspiration, we all know that online interactions play a role in influencing the ultimate purchase decision. But how much so? New clickstream data from Luth Research's opt-in panel¹⁰ (which shows the online pages a user visited) and Mindswarms mobile video surveys¹¹ provide just that type of insight.

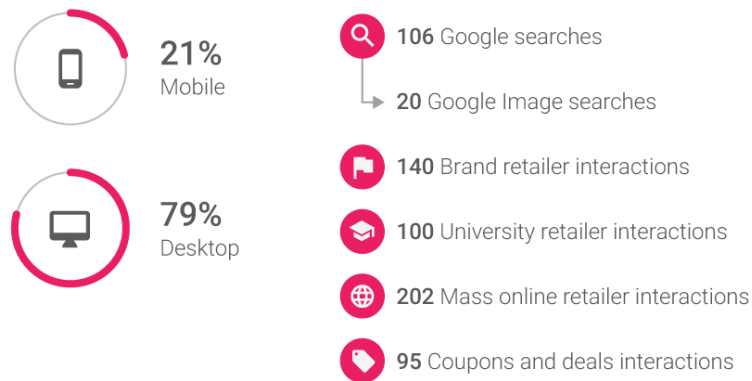
By analyzing a shopper's micro-moments (in the form of searches, clicks, and website visits) over the course of one month, we can start to see exactly *how* and *how much* digital played a role in influencing his purchase decisions.

Meet Marcus. He's 27, and from Ohio. He's a health aficionado and online educator. He uses what he learns online to develop educational video content for his YouTube channel. Over the course of the month where his online activity was observed, Marcus was interested in learning about wheatgrass and juicers. Unrelatedly, he was also shopping for a graduation gift for his girlfriend.

Here's a high-level look at the digital touchpoints (searches, visits, and clicks) that shaped Marcus' shopping micro-moments that month.

Source: Google/Luth Research, U.S., methodology—Google partnered with Luth to analyze the digital activity of its opt-in panel participants during a one-month, live-tracking study. This article details the cross-device clickstream data of one of those participants. Marcus is a pseudonym. The participant agreed to the publication of this research for marketing purposes under the condition of anonymity.

Marcus' shopping micro-moments included over 600 digital touchpoints* over a one-month period



* Touchpoints = searches, visits, clicks

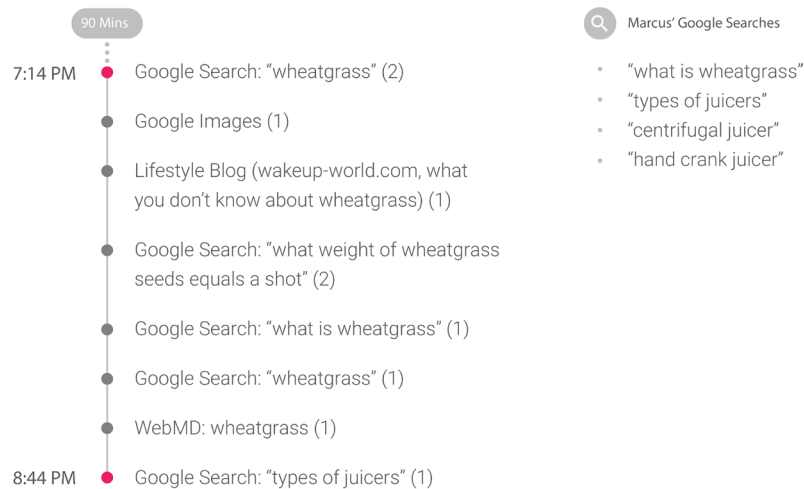
Snapshot of a real shopper's top-of-funnel search behavior

Looking at one of Marcus' I-need-some-ideas moments specifically, it's clear that his quest to learn more about wheatgrass led him down a path to then research juicers. Here's a real sample of one of Marcus' research paths that started with a search in an I-need-some-ideas moment.

One of Marcus' I-need-some-ideas moments

One of Marcus' search paths

Source: Google/
Mindswarms, US.
Methodology: Google
partnered with
Mindswarms to select
and interview the
participants of this live-
tracking pilot study. The
participants answered
questions about their
shopping behaviors and
digital activity via video.



How to win I-need-some-ideas moments: Be there and be useful

At this early stage in the consumer decision journey, a brand's role is to provide inspiration and ideas with content. Here are some concrete tips for engaging people with [relevant](#) and [useful](#) content in their I-need-some-ideas moments.

Ensure you show up to be considered. If you want to be included in the consideration set, you need to be there not only when people search for your brand, but also when they search on category terms related to the products you carry. Forty percent of the shopping searches we see on Google are for broad category queries like "bedroom furniture" or "women's athletic clothing."¹² Therefore, if you sell a wide variety of sofas, for example, you should be there when people search "sofas," "sleeper sofas," "sofa beds." and "couches."

Source: Google Data,
U.S., anonymized,
aggregated searches
that trigger a PLA, Nov.
2015.



40%

of the shopping searches we see on Google are for **broad category queries** like bedroom furniture or women's athletic clothing.

At Google we've also been tracking a steady rise in product-related searches on Google Images and YouTube where people often turn for ideas and inspiration. So it's not only when you show up that's important, but also where.

Create inspiring visual content

- **Mobile design:** Be sure that your mobile site experience itself enables you to be useful in I-need-some-ideas moments. Check out this guide for how to design better mobile apps and sites for retail. It includes 25 UX best practices you can follow.
- **Imagery:** People who search and shop on their smartphones at least once per week say that product images are the shopping feature they turn to most.¹³ Images are one of the quickest and easiest ways for people to get an idea of your products, so if you run Shopping

campaigns on Google, ensure you're uploading quality images and relevant titles into your product feeds.

- **Video:** Creating video content for mobile that inspires and provides useful information is key to engaging shoppers. In 2015, people in the U.S. spent nearly twice as much time watching fashion and apparel shopping videos on YouTube than they had the previous year.¹⁴ When it comes to building video content, be authentic to your brand and provide utility and inspiration in ways that are unique to you. For example, if you're an apparel or jewelry brand, creating content such as "how to layer necklaces" or "accessorize a black dress" can be a way to inspire shoppers.

How leading retailers are meeting consumer needs in I-need-some-ideas moments

Lifestyle icon **Williams-Sonoma** has always been a visual brand. It has a long history of crafting lifestyle imagery through its catalog to inspire its customers during their I-need-some-ideas moments. But the brand has had to rethink the way it tells its story.

Source: Google
Consumer Survey,
based on U.S. online
population, n=550, Jan.
2015.



Nearly

60%

of millennials use mobile as a "sous-chef"
while cooking in the kitchen.

The catalog still has a place, but mobile phones are increasingly the new starting point for kitchen connoisseurs (especially millennials). In fact, nearly 60% of millennials use mobile as a "sous-chef" while cooking in the kitchen.¹⁵ Williams-Sonoma uses video content and more visual shopping

ad formats to inspire these shoppers. As a result Williams-Sonoma has seen a 70% increase in mobile sales YoY, and a 51% overall increase in e-commerce sales.



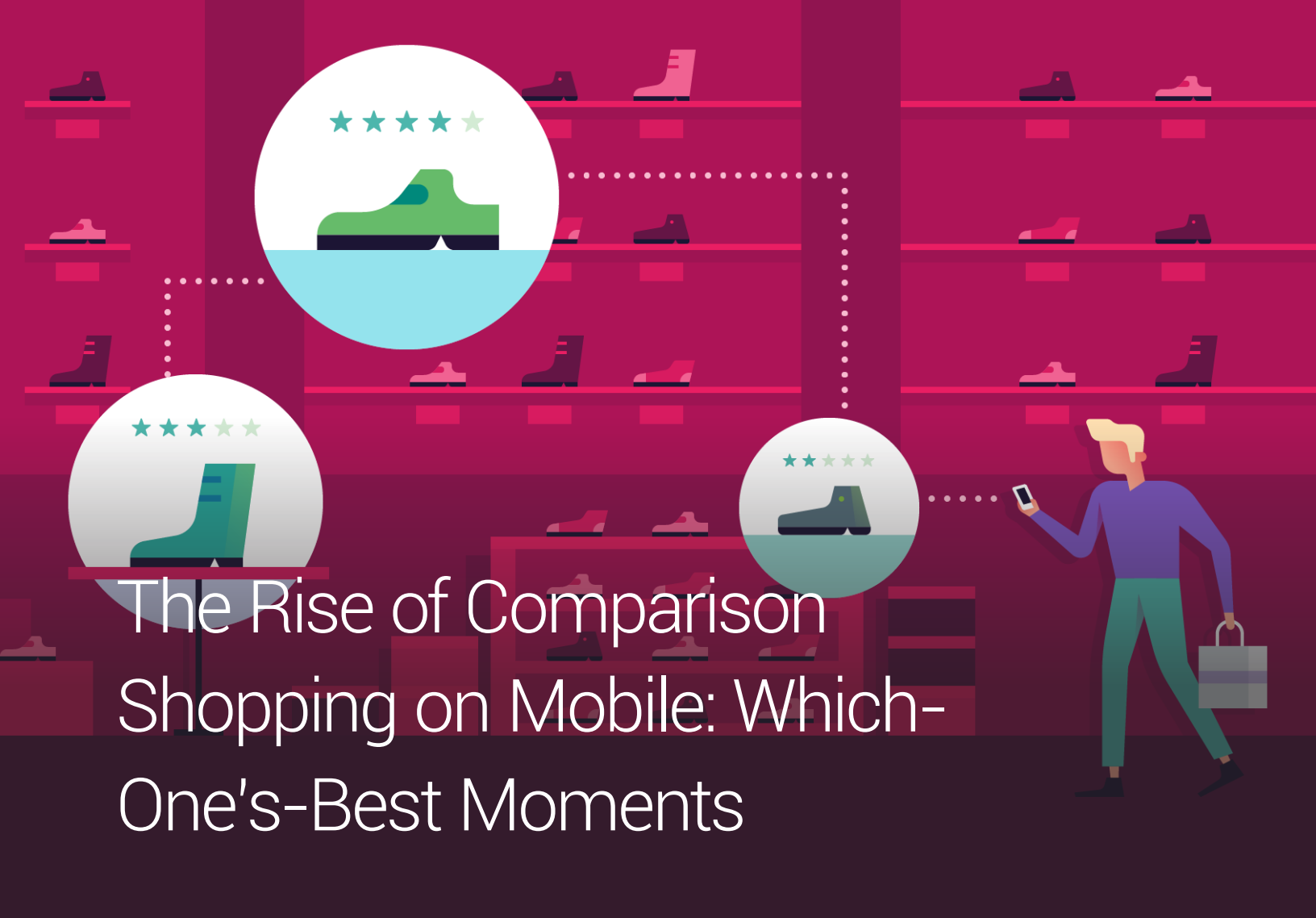
There's a lot more to learn. Check out this [more detailed feature](#) on Williams-Sonoma's approach to I-need-some-ideas moments, including a video complete with an interview from Williams-Sonoma's Chief Marketing Officer.

"Being there" for **Swarovski** used to mean showing up in seasonal moments like Christmas, Mother's Day, and Valentine's Day. But search insights revealed the opportunity to engage people in more everyday inspirational moments, like when they're wondering how to accessorize an outfit.

Since 50% of Swarovski's site traffic comes from mobile, the brand focused on developing mobile content that's visual, inspirational, and easy to navigate. The brand's interactive [Style Finder](#) offers ideas for how to accessorize a look for work or that special date night, and allows the customer to dial-up or dial-down a look, depending on her mood. By meeting customers on mobile as they search for inspiration, Swarovski has grown its online sales by 50% year over year, with mobile sales growing more than 150%.



There's a lot more to learn. Check out this [more detailed feature](#) on Swarovski's approach to I-need-some-ideas moments, including a video complete with interviews from the people driving this thinking for the brand.



The Rise of Comparison Shopping on Mobile: Which-One's-Best Moments

Shoppers constantly search for the best: best product, best price, best reviews. Here, we look at how shoppers increasingly turn to mobile to compare products—both in the store and online.

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The Nike running shoes or the Asics? The down pillow or the foam? The \$59 headphones or the \$199 pair? As today's shoppers narrow their options, comparing, contrasting, and conducting further research, they enter the realm of which-one's-best moments.

With more information literally at our fingertips, we're all more informed shoppers. And data backs this up: Fifty-nine percent of the online population is making more informed decisions about what to purchase now versus a few years ago.¹⁶

Enter: smartphones. Mobile makes comparison shopping all the easier in these [micro-moments](#). In fact, mobile searches related to "best" products grew by more than 50% year over year.¹⁷ And online reviews carry a lot of weight: Eight-eight percent of consumers say they trust online reviews as much as personal recommendations.¹⁸ So it's no wonder that the number of product review videos on YouTube grew 50% year over year.¹⁹

Source: Google Data,
Apparel, Home & garden,
Beauty & personal care,
Computers & electronics
and Gifts, US, May 2015
vs. May 2016



Mobile searches related to **"best" products** grew more than 50% year over year.

A real-life look at the consumer decision journey: a shopper's micro-moments

When it comes to shopping research, we all know that online interactions play a role in influencing the ultimate purchase decision. But how much so? New clickstream data from Luth Research's opt-in panel²⁰ (which shows the online pages a user visited) and Mindswarms mobile video surveys¹¹ provide just that type of insight.

By analyzing a shopper's micro-moments (in the form of searches,

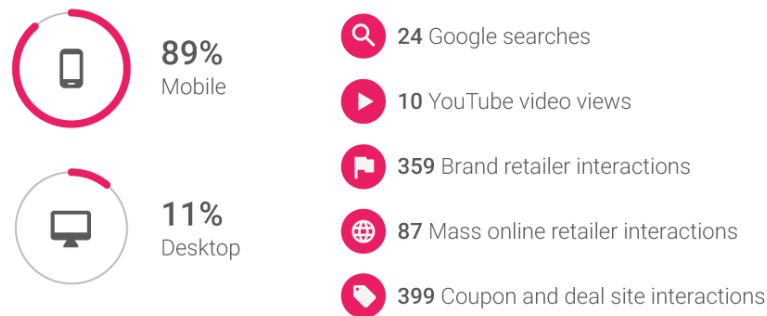
clicks, and website visits) over the course of one month, we can start to see exactly how and how much digital played a role in influencing her purchase decisions.

Meet Kaitlyn, a 27-year-old from Wisconsin who frequently shops on her phone and regularly scouts online deals before making a purchase. Over a one-month period, Kaitlyn had nearly 1,000 retail interactions across a variety of sites, 89% of which occurred on mobile. During that time, she was on the hunt for some new yoga pants, a new area rug, and some personal care products.

Here's a high-level look at the digital touchpoints (searches, visits, and clicks) that shaped Kaitlyn's shopping micro-moments that month.

Source: Google/
Luth Research, U.S.,
methodology: Google
partnered with Luth
to analyze the digital
activity of its opt-in
panel participants
during a one-month,
live-tracking study. This
article details the cross-
device clickstream
data of one of those
participants. Kaitlyn
is a pseudonym. The
participant agreed to
the publication of this
research for marketing
purposes under the
condition of anonymity.

Kaitlyn's shopping micro-moments included 947 digital touchpoints* over a one-month period



* Touchpoints = searches, visits, clicks

Snapshot of a real consumer's comparison shopping

Kaitlyn was on the hunt for two new area rugs for her home. She wanted affordable rugs that were 7x9 in size and relatively neutral in color.

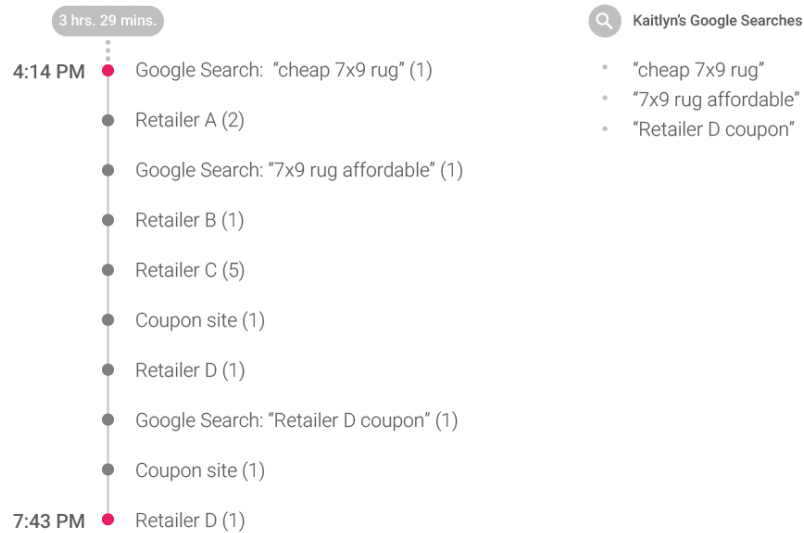
After searching on Google for both “cheap 7x9 rug” and later “7x9 rug affordable,” Kaitlyn compared her options on four different retailers’ sites. She ended up purchasing one rug on Retailer D’s mobile site, where she was able to find a discount and use a credit she had.

During her search for area rugs, here’s what one of Kaitlyn’s which-one’s-best moments looked like:

Kaitlyn’s which-one’s-best moments

One of Kaitlyn’s mobile search paths

Source: Google/
Mindswarms, U.S.,
methodology: Google
partnered with
Mindswarms to select
and interview the
participants of this live-
tracking pilot study. The
participants answered
questions about their
shopping behaviors and
digital activity via video.



How to win which-one’s-best moments: Be there and be useful

As a retail marketer, which-one’s-best moments are your opportunity to put your best foot forward and differentiate your products. Here are a few concrete ways to do that:

Feature product reviews. Make it easy for consumers to choose you by letting others speak on your behalf. If you gather product reviews on your site, [highlight your reviews](#) in the form of stars on your Shopping ads to

make your products stand out.

Promote your best sellers. Once on your site, consumers may still grapple with making the right decision. Promote your best sellers on desktop and mobile to guide those who may not know how to distinguish between two lengthening mascaras or two different brands of SLR cameras.

Feature products in context. Just like it's easier to sell a home that's staged, it's easier to sell purses, dining room furniture, or jewelry (or ... anything) when you show the products in use. In fact, 64% of women who shop for apparel on their smartphone agree that seeing images of products in context positively influences their purchase decision.²¹ Highlight the product in context either through multiple images or video.

Source: Google/Ipsos
Connect, How Images
Influence Mobile
Shoppers, Phase 2,
mobile women's apparel
shoppers, n=551, Jun.
2016.



64%
of women who shop for apparel on their
smartphone agree that **seeing images of
products in context** positively influences
their purchase decision.

Show local availability of products. Six in 10 internet users check whether a product is available in a local store before visiting a store.¹ [Local inventory ads](#) can help you turn comparison shopping into action by enabling people to see whether the exact product they're searching for is available in a nearby store.

How leading retailers are engaging consumers in which-one's-best moments

Global beauty retailer **Sephora** has taken steps to make the most

of which-one's-best moments that play out in its store aisles. After observing that shoppers were turning to their phones mid-shop, the retailer realized that shoppers weren't necessarily price comparing—they were searching for product ratings and reviews online before they put something in their basket.

Sephora built their app experience around this insight, allowing customers to scan products to read consumer ratings and reviews, view purchase history to remember the exact shade of a product they already have, and save loyalty information so they can earn points and redeem for gifts.

Since optimizing its mobile app for in-store, Sephora's mobile orders increased 167% in one year, and loyalty members spent twice as much annually and purchased twice as frequently as other Sephora customers.²²



There's a lot more to learn. Check out this [more detailed feature](#) on Sephora's approach to which-one's-best moments, including a video complete with interviews from the people driving this thinking for the brand.

Consumer electronics retailer **Best Buy** faced a different challenge. As the nature of consumer electronics has gotten more complex, so have the questions that shoppers ask of the famous Blue Shirts. For example, today customers come into the store and say, "I want to stream photos from my SLR camera, onto my television, from my phone." They want to understand how products interconnect to make their lives better.

To address this need for more information, Best Buy shifted its broadcast budget to digital where they can scale information more easily. The brand now uses ads that surface product availability in stores closest to where

the customer is searching. The brand also created mobile buying guides on its site and on YouTube.

Last holiday, Best Buy saw that local inventory ads, which surface the availability of products in-store, drove over 1 million store visits. The brand also found that mobile Shopping ads on Google outperform television in terms of return on investment.



There's a lot more to learn. Check out this [more detailed feature](#) on Best Buy's approach to which-one's-best moments, including a video from Best Buy's Chief Marketing Officer.



I-Want-To-Buy-It Moments: Mobile's Growing Role in a Shopper's Purchase Decision

This is the moment the consumer chooses you. And whether or not the purchase happens on mobile, these moments are increasingly influenced by mobile. Here, we explore how retailers can optimize their mobile experience to close the deal.

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In I-want-to-buy-it moments, shoppers have already researched, compared, and prepared, and they're finally ready to put dollars behind their decision. The question is: How will they buy?

Although the vast majority of retail purchases still happen in-store, mobile's influence over these purchases is rapidly growing. According to Deloitte, 64 cents of every dollar spent in retail stores is influenced by digital,²³ and we know that mobile is a big driver. In fact, 76% of people who conduct a local search on their smartphone visit a business within 24 hours and 28% of those searches result in a purchase.²⁴

What does this mean for retailers? Whether shoppers turn to mobile to buy or to simply get that final piece of information before heading to the cashier, it's crucial to show up with a fast, frictionless mobile experience. If your site is clunky or slow, a shopper could abandon it—or even worse, head to a competitor. To see just how this plays out, let's start by looking at one shopper's micro-moments.

Source: Google/
Purchased Digital Diary,
"How Consumers Solve
Their Needs in the
Moment," smartphone
users=1,000, local
searchers=634,
purchases=1,140, May
2016.



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of people who conduct a local search on their smartphone visit a business within 24 hours and **28% of those searches result in a purchase.**

A real-life look at the consumer decision journey: a shopper's micro-moments

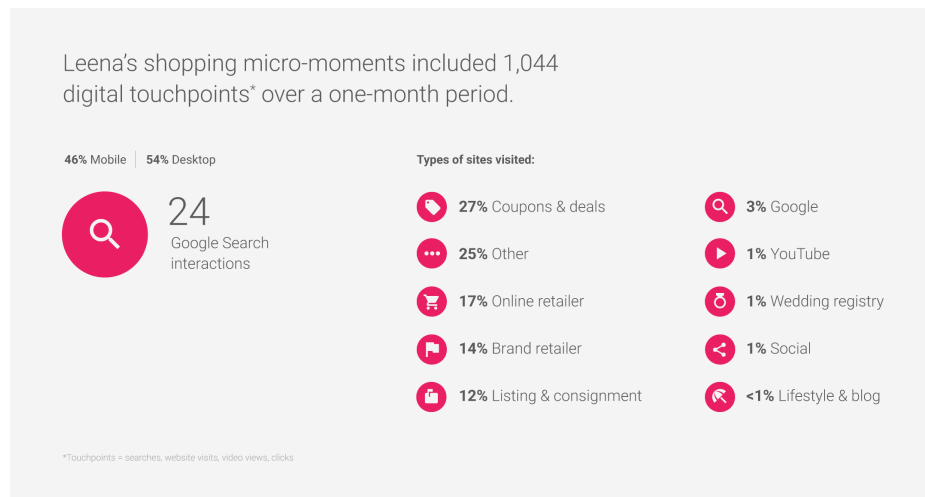
We all know that online interactions play a role in influencing the ultimate purchase decision. But how much so? New clickstream data from Luth Research's opt-in panel²⁵ (which shows the online pages a user visited) and Mindswarms mobile video surveys¹¹ provide just that type of insight.

By analyzing one shopper's micro-moments (in the form of searches, clicks, and website visits) over the course of one month, we can start to see exactly how and how much digital played a role in influencing her purchase decisions.

Meet Leena, a 32-year-old married female from Washington state. Leena's a super shopper who regularly looks for deals and coupons online. Over a month period, Leena has over 1,000 retail interactions across a variety of sites and constantly switches between mobile and desktop as she shops.

Here's a high-level look at the digital touchpoints (searches, visits, and clicks) that shaped Leena's shopping micro-moments that month.

Source: Google/
Luth Research, US.
Methodology: Google
partnered with Luth
to analyze the digital
activity of its opt-in
panel participants
during a one-month,
live tracking study. This
article details the cross-
device clickstream
data of one of those
participants. Leena
is a pseudonym. The
participant agreed to
the publication of this
research for marketing
purposes under the
condition of anonymity.



Snapshot of a real shopper's search behavior

Now, let's look at Leena's search query path for a specific I-want-to-buy-it moment. Leena ran out of mascara and was interested in switching from her traditional drugstore brand mascara to something that would last longer and provide a better look.

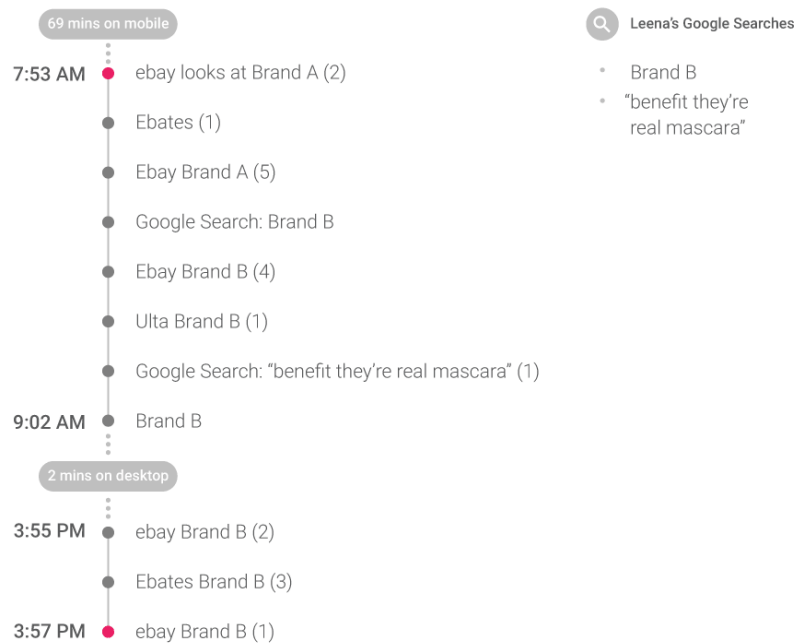
While shopping on her phone, Leena narrowed her choices down to

two mascara brands, read a number of product reviews, and eventually bought a specific mascara from Brand B due to the reviews and price point.

One of Leena's I-want-to-buy-it moments

One of Leena's mobile search paths

Source: Google/
Mindswarms, U.S.,
methodology: Google
partnered with
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and interview the
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tracking pilot study. The
participants answered
questions about their
shopping behaviors and
digital activity via video.



How to win I-want-to-buy-it moments: Be there and be useful

To win these moments, the best retailers create a seamless checkout experience both online and in-store. Here are some actions you can take to ensure shoppers' will want to buy from you.

Speed it up. U.S. retailers' conversion rates on desktop are 2X as high as

mobile conversion rates.⁶ Why? Because the purchase process on many retailers' mobile sites is still clunky. In fact, 29% of smartphone users will immediately switch to another site or app if it doesn't satisfy their needs (that is, they can't find information or it's too slow)⁹ and therefore page load time and streamlined experiences are important. Learn how to [speed up your site](#) by reducing page load times. Brands such as Walmart have experienced up to a 2% conversion rate increase simply by reducing their mobile site page load time by four seconds.²⁶

Resurface promotions, deals, and coupons at checkout. As you've seen in Leena's story, buyer decision-making online is sometimes all about price, deals, and coupons. If shoppers have to hunt for promotions, deals, or coupon codes, they may abandon your mobile site or app to search for them, leaving no clear path back to return to their shopping experience. Avoid losing shoppers who have yet to make a purchase by providing promotions, deals, and coupons immediately at checkout.

Provide multiple checkout and fulfillment options. When ready to buy, people want convenience and simplicity. Consider this: Twenty-three percent of people abandon retailer sites because they had to create a new user account at checkout.²⁷ So, allow first-time buyers to purchase before suggesting account creation. As for payment and pick-up, people want options: Sixty-nine percent of people say that it is important that a retailer offers multiple ways to buy a product, such as buying online or picking up in-store.²⁸ Enable people to buy quickly via Android Pay, PayPal, and other platforms where their information is stored.

How leading retailers are engaging consumers in I-want-to-buy-it moments

[Argos](#) has been one of the U.K.'s best-known "high street" retailers for 40 years. For many years, customers would walk in, order from a catalog, and wait for an employee to bring the item out from the storeroom. But

when Argos put its inventory online, the company realized everything had changed: Forty-six percent of Argos' customers start online, while 90% of its customers still end up in-store to buy. In a business that's all about immediacy and driving customers into the local store, Argos needed to find new ways to use mobile and online to connect with its customers.

To make the purchase process as easy and seamless as possible, Argos started running [local inventory ads](#) online to surface products that were available in the stores closest to where that customer was searching. The customer could then reserve the product online, and on her way home from work, drop into the nearest Argos store to collect the order. Fast Track—a speedy, in-store pickup option that Argos launched in 2014—allows customers to collect their products in-store in fewer than 60 seconds. Argos' new approach to mobile is working: Nearly half of Argos' total sales now come from online shoppers.



There's a lot more to learn. Check out this [more detailed feature](#) on Argos' approach to I-want-to-buy-it moments, including a video from the Chief Digital Officer.

Another example of a retailer that knows about frictionless buying: **Fancy**. The company sells unique crowd-curated goods to buyers who want to have the next cool thing, from dog trench coats to plasma-ignited lighters. Its customers buy on impulse, and impulses can be lost quickly when the buyer is confronted with a long payment flow.

To lower cart abandonment rates, Fancy implemented Android Pay, a simple and secure way for Android users to check out on mobile by

entering their payment and shipping information with a single click. Not only did Android Pay simplify the payment flow for millions of users on its site, it actually doubled Fancy's conversion rate. Now, 20% of Fancy's Android users check out with Android Pay at no additional cost to Fancy.



There's a lot more to learn. Check out this [more detailed feature](#) on Fancy's approach to I-want-to-buy-it moments, including a video complete with interviews from the people driving this thinking for the brand.

The bottom line: Even when shoppers don't buy on mobile, mobile has a big role to play in making the sale. And when the sale does happen on mobile, the retailers that close the deal have a fast, frictionless experience.

Next, we'll look at the three simple steps to winning shopping micro-moments in this new customer decision journey.



Shopping Micro-Moments: Three Steps to Set Your Brand Up for Success

When it comes to shopping, the smallest moments have the biggest impact. And for retailers, this means being there and being useful for shoppers anytime, anywhere. Here, we look at three steps any brand can take to start winning more shopping micro-moments.

think with **Google**

Shoppers rely on their smartphones now more than ever. From searching for ideas, to comparing which one's best, to finally deciding on the right one, they turn to mobile in all of these shopping moments. For retailers, the question is: How can you shift your strategy to keep up with mobile's growing influence on the customer decision journey?

Here are three steps to be there and be useful in the moments that matter to customers.



Organize for
micro-moments



Identify your brand's
micro-moments



Measure
micro-moments

1. Organize for micro-moments.

Of course, it's important to take action on the team level: test new types of ads, build new content, improve your mobile site load time, and so on. But the small stuff can only take you so far. Real change involves your whole company agreeing to take a unified approach to giving shoppers the experience they need and expect.

Take this example. A few years ago, classic American department store [Macy's](#) discovered that customers who shopped both online and in-store were far more valuable—in fact, 8X more valuable—than those who shopped in a single channel. Macy's knew it had to make internal changes to better serve these shoppers. In 2014, Macy's built an organization-wide mission to win omni-channel shoppers.

The company launched a pilot in its “social dresses” category, combining the online and offline merchandising and marketing teams. This gave both of these teams a single view of inventory across channels and therefore a single view of the customer. The results were so positive—with significant gains in customer experience, sales, and margins—that Macy's rolled out the new structure across all its categories in 2015.

This kind of sweeping (and effective) change starts with a few simple steps. In [recent research](#) commissioned by Google and conducted by Forrester Consulting, Forrester suggests three starting points for brands who want to focus on internal organization:²⁹

- **Create a cross-functional steering committee** to allocate resources and influence budgets.
- **Align incentives** and performance goals among IT, marketing, product, and finance teams.
- **Get CIOs and CMOs working closely together.** CMOs own the customer experience and increasingly need to own customer data, analytics, and insights. That's why close CIO and CMO alignment is critical for creating richer and more useful experiences.

2. Identify your brand's micro-moments.

Even within digital, there are big differences between how people shop for, say, golf clubs versus washing machines. It's important to know what the typical purchase journey looks like for your industry and business.

If it's appliances you sell, what kinds of micro-moments do people in the market for a washing machine or microwave have? Break them down by I-need-some-ideas, which-one's-best, and I-want-to-buy-it moments.

You can also use a few tools to find the moments that matter for your brand. [The Shopping Insights beta tool](#) allows you to explore the

popularity of products in cities across the U.S. and segment by date range and device. For example, you can see whether people in Boston search for “ripped jeans” and if so, whether they’re searching on mobile or desktop. You can also browse curated stories of larger trends taking place across the nation.

The [Shopping Assortment Report](#) in your Google Merchant Center account can also help you meet real-time demand by identifying new brands and products to add to your product assortment. The data is based on the popularity of these products on Google Shopping, offering a near real-time view into online consumer demand.

3. Measure micro-moments.

Many digital marketers use last-click attribution and cost-per-acquisition as metrics for online success in a desktop world. The tendency is to try and make them the basis of measurement for micro-moments as well.

But mobile introduces an entirely new set of behaviors—across devices and channels—that requires you to measure beyond the last click or the online sale.

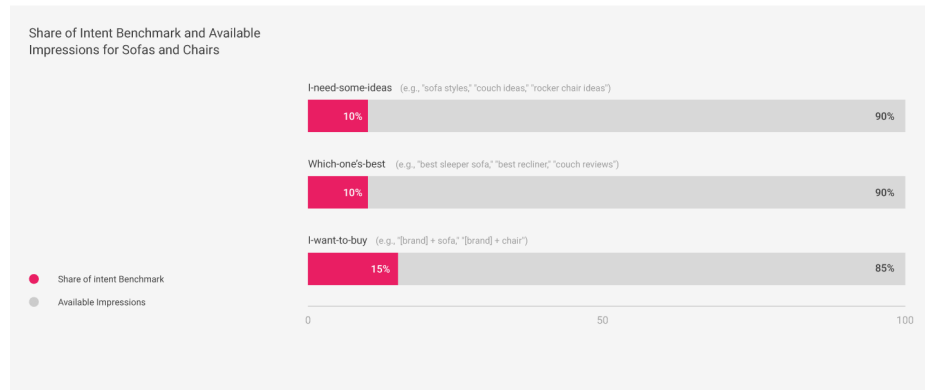
International retailer **Lighting New York** shifted its focus after recognizing that customers weren’t buying from it on mobile. The company had treated mobile as a converting channel, but the marketing team realized that its customers were primarily using mobile as a research tool.

The team shifted its mobile success metrics to focus on the larger business goal: increasing brand recognition. To do so, it increased its campaign bids on mobile and bid more on nonbranded, upper-funnel terms such as “hanging lights.” As a result, it doubled its impressions on its brand terms—meaning more customers were searching for the brand—and also increased sales.³⁰

At Google, we often look at what we call share of intent. It's a simple measure of success: the number of times your brand appears for searches in the moments where you want to be most.

Consider the chart below. It illustrates the average share of intent for top brands advertising on sofas and chairs.

Source: Google Search Data, mobile, Jan.–Mar. 2016. This example shows impression share for top retail brands advertising on a subset of sofas- and chairs-related queries that are illustrative of the opportunity in each moment, but not comprehensive. I-need-some-ideas includes queries that contain "ideas," "style," and "inspiration"; which-one's-best includes queries containing "best," "reviews," "top," and "compare"; I-want-to-buy contains retailer brand queries related to sofas and chairs.



For example, when we look at the brands that most frequently advertise against sofas- and chairs-related searches that include "ideas," "style," or "inspiration" in the search query, we see that on average, they have a 10% share of intent.

If you want to know what's working, your share of intent in those moments can be a good place to start. As your measurement techniques evolve, you start to [measure the impact of cross-device and cross-channel marketing](#).

Petit Bateau, the 120-year-old global apparel brand, is one example of a brand that's actively measuring across channels. The company knew that its customers were researching online prior to purchasing in-store, but it wasn't sure exactly where those customers were conducting their research and which channels were contributing to in-store traffic and sales. Its store teams weren't convinced that digital was playing a major role.

The company turned to Google Analytics to understand how online

(especially mobile) impacts in-store behavior. By adding in-store purchase data into Google Analytics, Petit Bateau used loyalty cards to match logged-in website customers to customers who purchased in-store. This showed it that:

- Forty-four percent of in-store buyers visited the Petit Bateau website within seven days prior to purchasing.
- Consumers with the highest in-store basket value conducted up to 3X more research online before they purchased.
- Those who visited the Petit Bateau mobile site converted in-store at an 11% higher rate than those who didn't visit the mobile site. Mobile site visitors also spent 8% more on average.

With that kind of end-to-end visibility from digital to store, Petit Bateau realized that its return from search was **6.4X higher** than it had previously thought. That kind of happy number can shake up a marketing strategy pretty fast.



There's a lot more to learn. Check out this [more detailed feature](#) on Petit Bateau's approach to shopping micro-moments.

The bottom line: The future of retail lies in the smallest moments. It's no longer critical for a shopper to be present in-store but rather for the store to be present wherever the shopper is. Many retailers, from Best Buy to Target to Swarovski, are seeing success in engaging shoppers in these moments. Are you there?

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