

The Influence of Multi-Device Ownership on Ecommerce

US Edition



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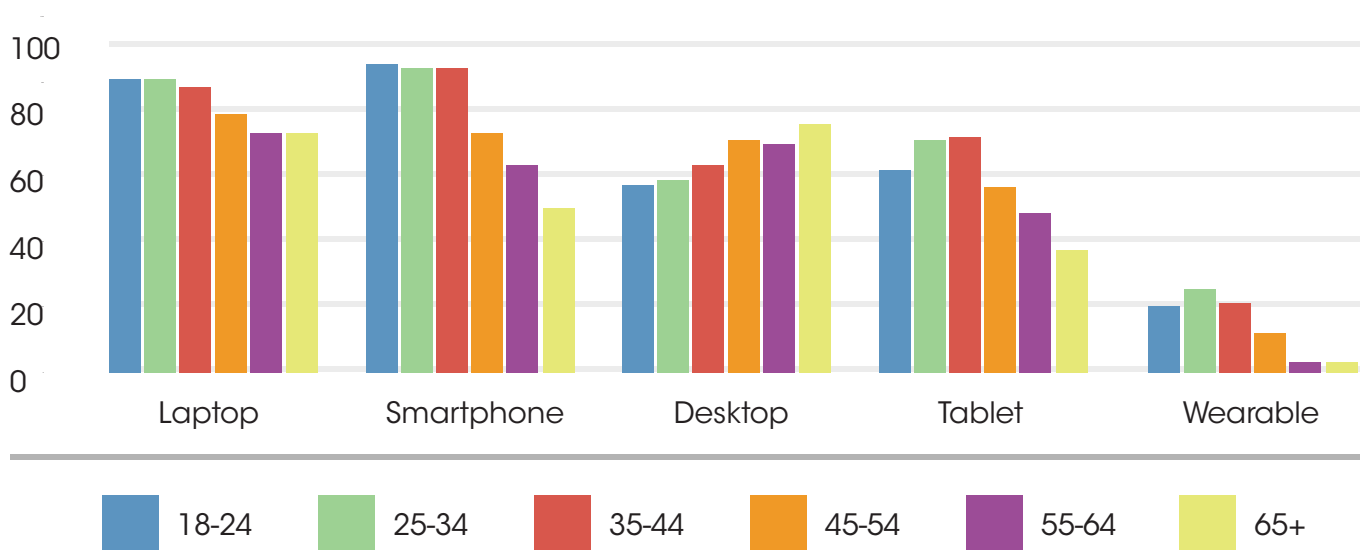
Smartphones, wearables, tablets – so many devices to stay connected whenever and wherever we are. So how have all these choices affected the consumer’s shopping experience? Bronto wanted to understand the influence of device ownership and use on the shopping behavior of US consumers, so we commissioned a survey of 1,000 US adults with access to at least one of these devices. Our findings provide insight into the growing interest in not just browsing, but also buying, via a mobile device.

One Consumer, Multiple Devices

American adults own an average of 2.9 devices for their computing and Internet needs. Men own more devices than women, but the difference is most pronounced when it comes to wearables. Nineteen percent (19%) of US men currently have a wearable versus only 9% of women.

The laptop is still the most popular device with little demographic variability by ownership. Not surprisingly, ownership of desktops skews older (45+) and smartphones and wearables are chosen more often by younger consumers (18-44). Tablets skew younger as well, but more in the 25-44 age groups than the 18-24 age group. Ownership of a smartphone has jumped from 51% of consumers to 75% in the three years that we have done this survey.

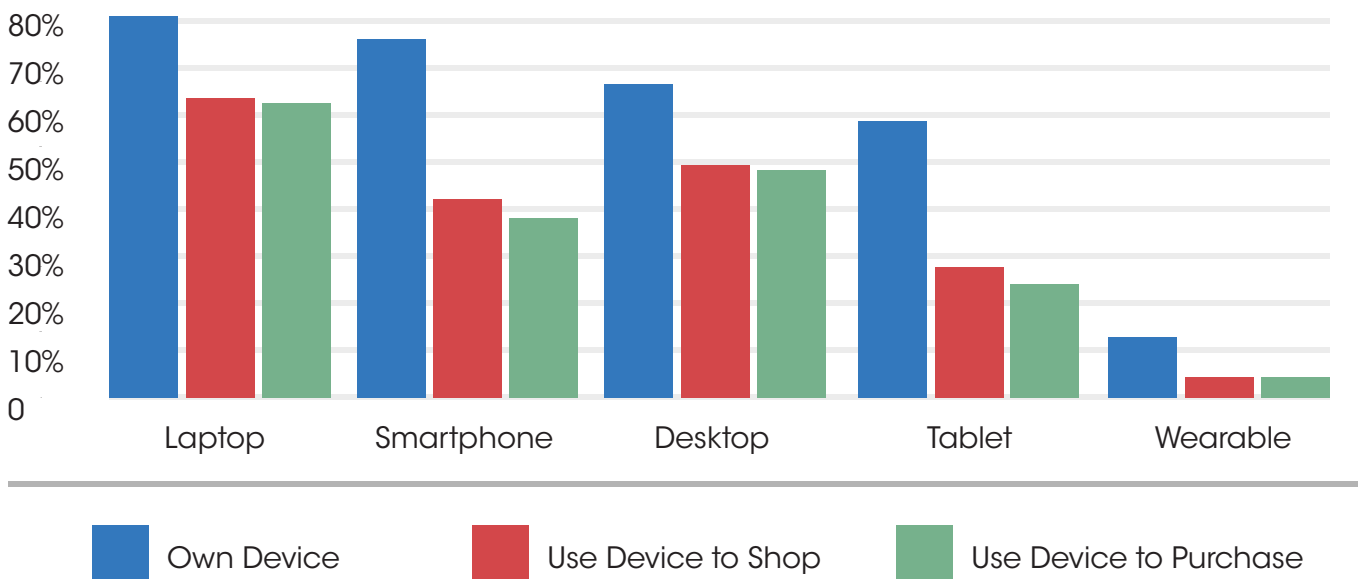
Ownership and Access to Devices by Age



How the Multi-Device User Shops and Buys

While adults in the US own an average of 2.9 devices, they don't use all of them to shop. Nor do they browse and shop from just one device. Our research shows that consumers use an average of 1.9 devices for shopping and 1.8 for purchasing. Three quarters of the laptop and desktop owners and about half of the smartphone and tablet owners use those devices for shopping. Here's the surprising fact: Just over a third of wearable users say they shop from their device.

Comparison of Device Ownership, Shopping and Purchasing Patterns



In the US, if you use your device for shopping, you also use it to make purchases.

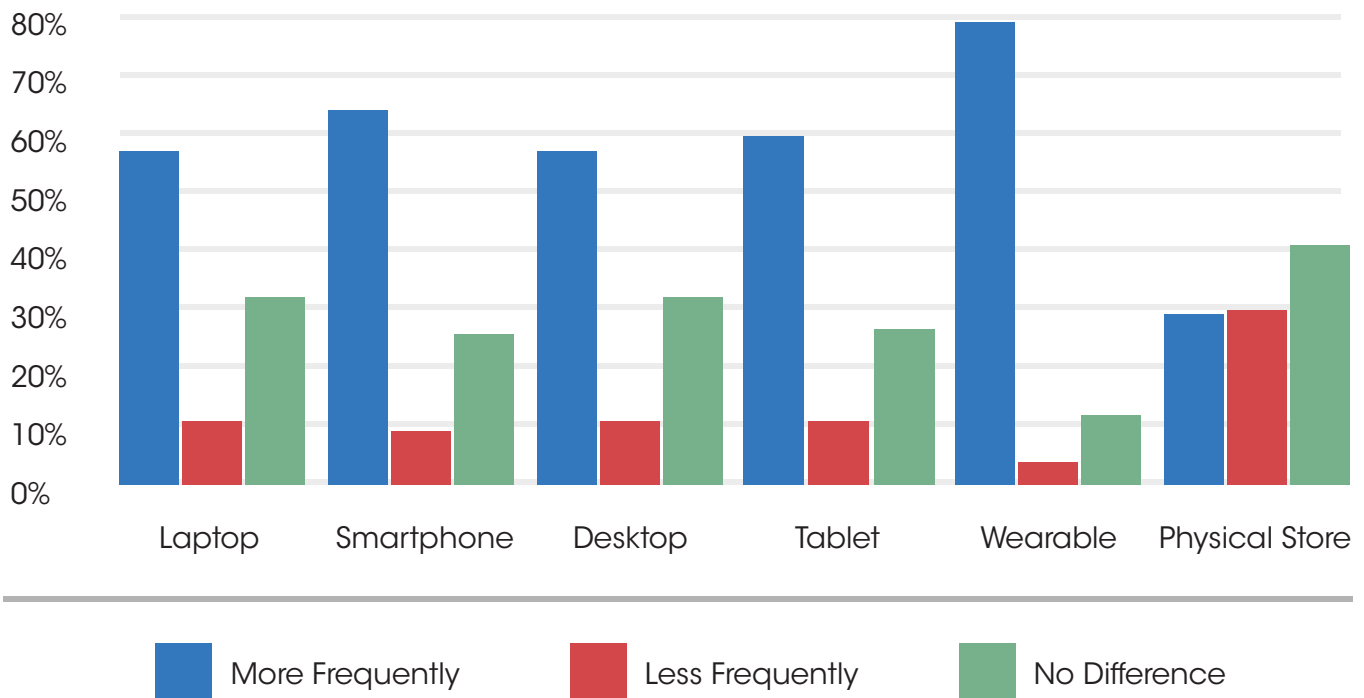


US Shoppers Typically Purchase With the Same Devices They Use to Shop, Whether or not in the Same Session

Although we think of ourselves as a mobile society, it's important to note that laptops and desktops still play a large role in the online purchase process. Nearly two-thirds of the population (63%) have made a purchase on their laptop in the last year, and almost half (49%) have purchased from their desktops.

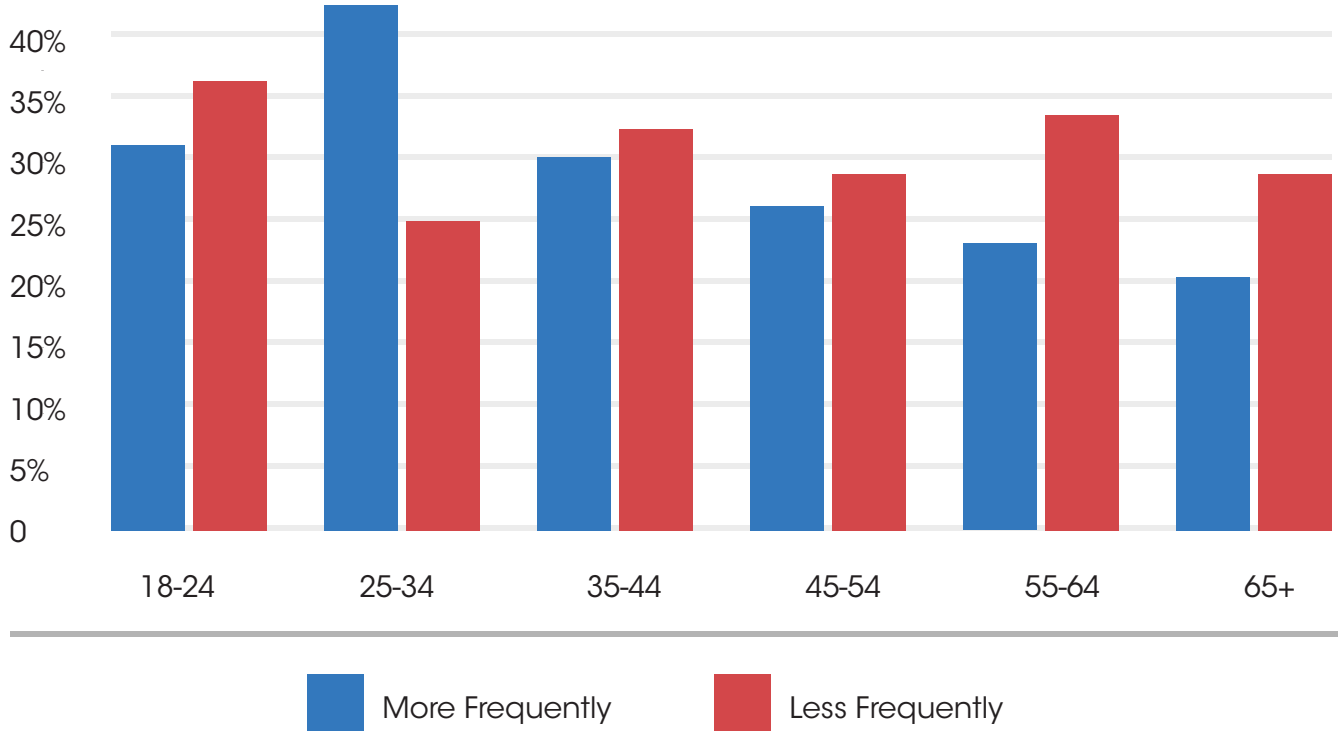
And shopping has increased substantially across every device. A majority of US consumers report that they are shopping more frequently on each device than they were a year ago, including 57% who say that their shopping on a laptop and on a desktop has increased. No device has a significant proportion of users whose shopping has decreased.

Change in Shopping Patterns in Last 12 Months



Only the physical store has seen a sizeable decline – nearly one third (30%) report shopping less frequently in stores. On the other hand, 29% report shopping more frequently in a physical store. The change in both directions can be attributed to various demographic groups. Forty-three percent of respondents who report shopping more often in stores are age 25-34. And those with a household income under \$75,000 also report shopping more frequently in stores. The youngest age group (18-24 year-olds) and respondents with the highest household income (\$100,000 and higher) report shopping less frequently in-store in the last 12 months.

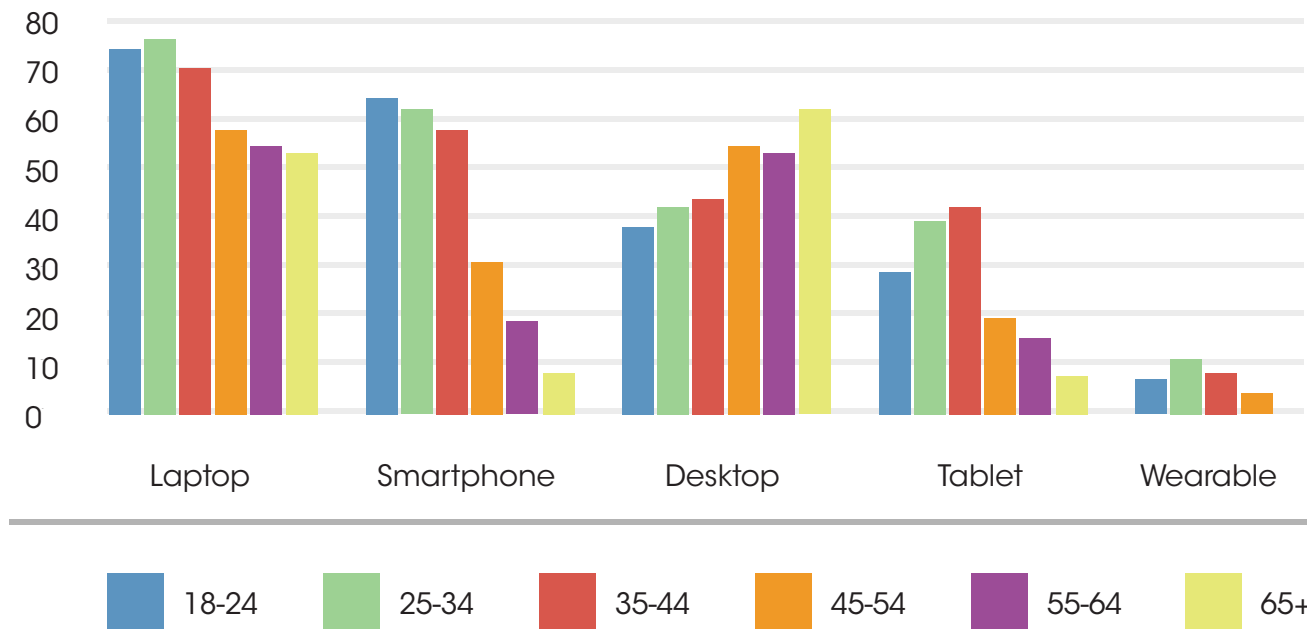
Change in Shopping Frequency by Age



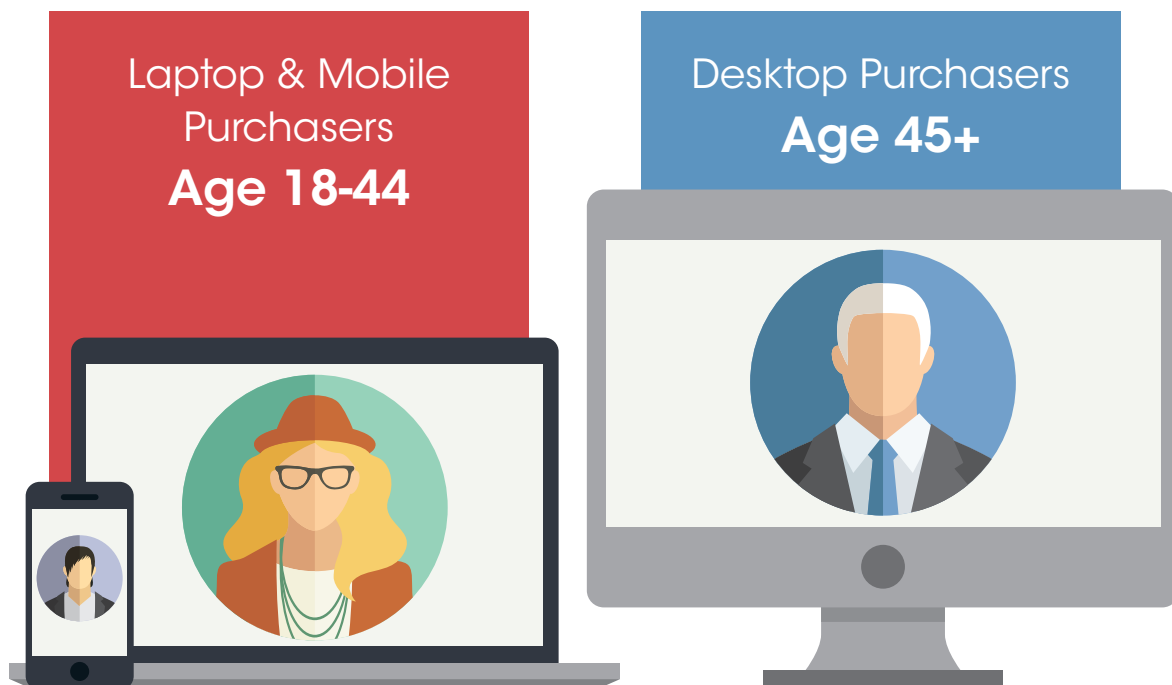
Identifying the Buyer by Device

Commerce marketers need to realize that we must create both shopping and purchasing experiences appropriate for the devices our target audience uses. So who exactly uses each device for purchasing?

Use of Devices for Purchase by Age

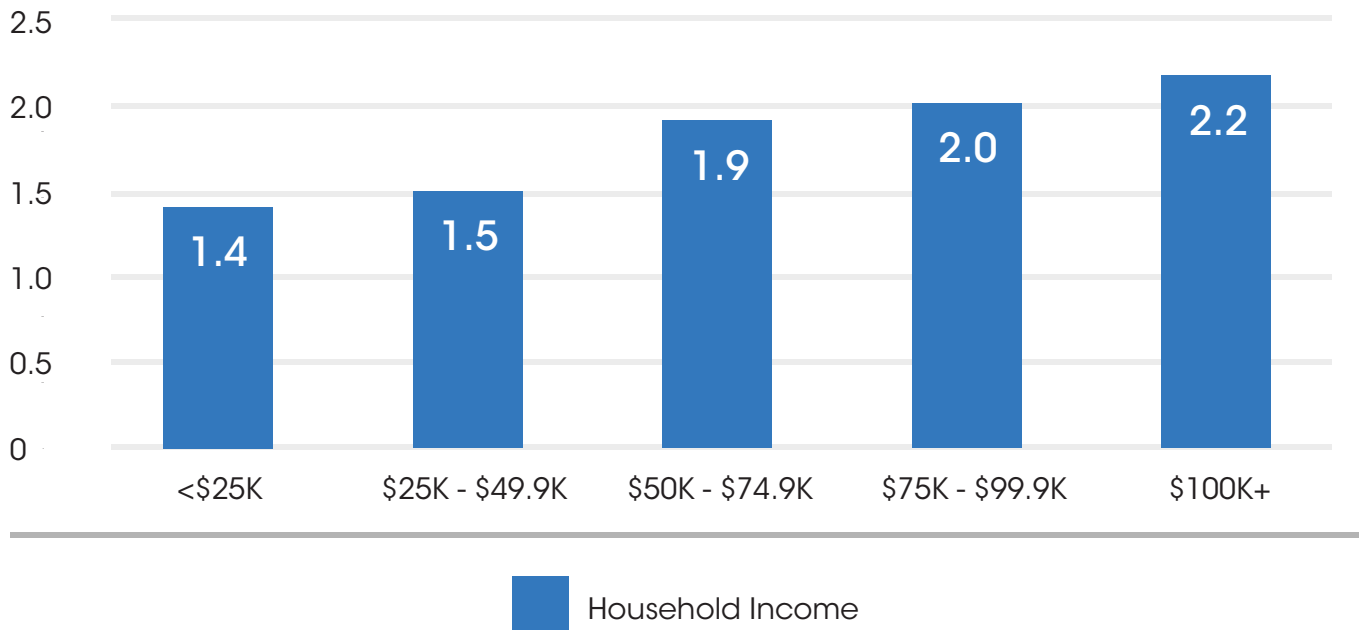


Purchasers using laptops and smartphones tend to be younger (18-44). Desktop users tend to be older (45+).



Another interesting and not unexpected finding is that multi-device purchasing increases with household income. Individuals with household income of \$25,000 or less own an average of 1.4 devices, and those with household income of \$100,000 own an average of 2.2.

Average Number of Devices Used for Purchase



Making it Seamless

The US consumer has embraced a wider array of methods for shopping and purchasing than ever before. They own and use three devices generally and rely on two of those for shopping and purchasing. Earlier research indicated a tendency to use mobile devices more for browsing, but this survey shows consumers seem comfortable purchasing via any device, mobile or not. If the consumer is willing to use the device to shop, they are equally willing to use it for purchase.

Who would have predicted that consumers would shop and buy directly from a wearable?

Will these trends continue or die out as new technologies emerge? One thing is for certain, commerce marketers must create a seamless, frictionless experience, regardless of where or when the multi-device, omnichannel consumer chooses to shop.



Bronto Software, a NetSuite (NYSE: N) company, provides a cloud-based commerce marketing automation platform to mid-market and enterprise organizations worldwide. Bronto is the number one ranked email marketing provider to the Internet Retailer Top 1000, with a client roster of leading brands, including Vince Camuto, Lucky Brand, Theory, Björn Borg and Christopher & Banks. The Bronto Marketing Platform is deeply integrated with commerce platforms, such as NetSuite, Magento, Demandware and Kibo. The company is headquartered in Durham, NC, with additional offices in London, Sydney, New York and Los Angeles. For more information, visit bronto.com.