

# Online Cross Device Usage

## Best Practice Insights for Retailer & Fashion



GfK Webinar am 6. September 2016  
Referent: Erk Maassen

# What you can expect ...



... our insight parkour for the next 45 minutes



1. Mobile First?

2. Cross-Device  
User Growth?

4. Programmatic:  
what else?

5. Summary  
&  
Q&A

3. Apps for Gaming  
& Chatting only?

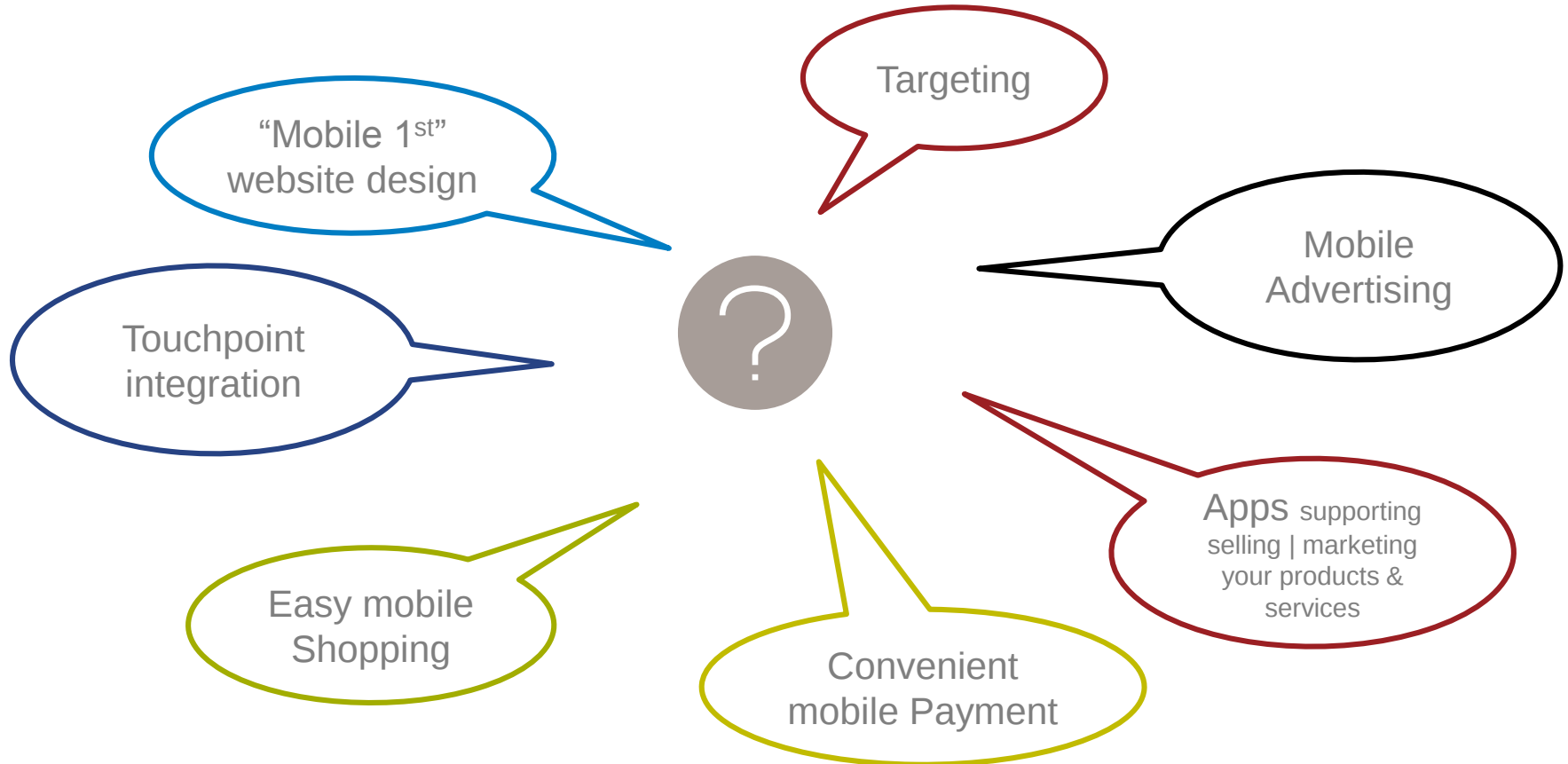


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# Mobile First?

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# “Mobile First”, always and everywhere?



# Understanding online behavior via website classification

To provide meaningful insights into online usage behavior, GfK developed proprietary website taxonomy. All relevant websites are classified for three dimensions



## User **Activity**

Classification based on user's main activity when accessing a site

## Online **Content**

Classification based on the main type of content of a site

## Business **Context**

Classification based on the main business context of a site

# Relevance of Mobile depends by **User Activity**



44

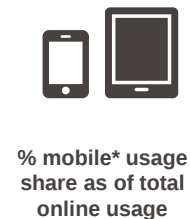
Minutes per month

294

Minutes per month

558

Minutes per month



21%

Money Management

43%

Shopping / Auctions / Rent

82%

Gaming / Gambling

Mobile 1<sup>st</sup>?  
Not Really

Mobile 1<sup>st</sup>?  
Probably

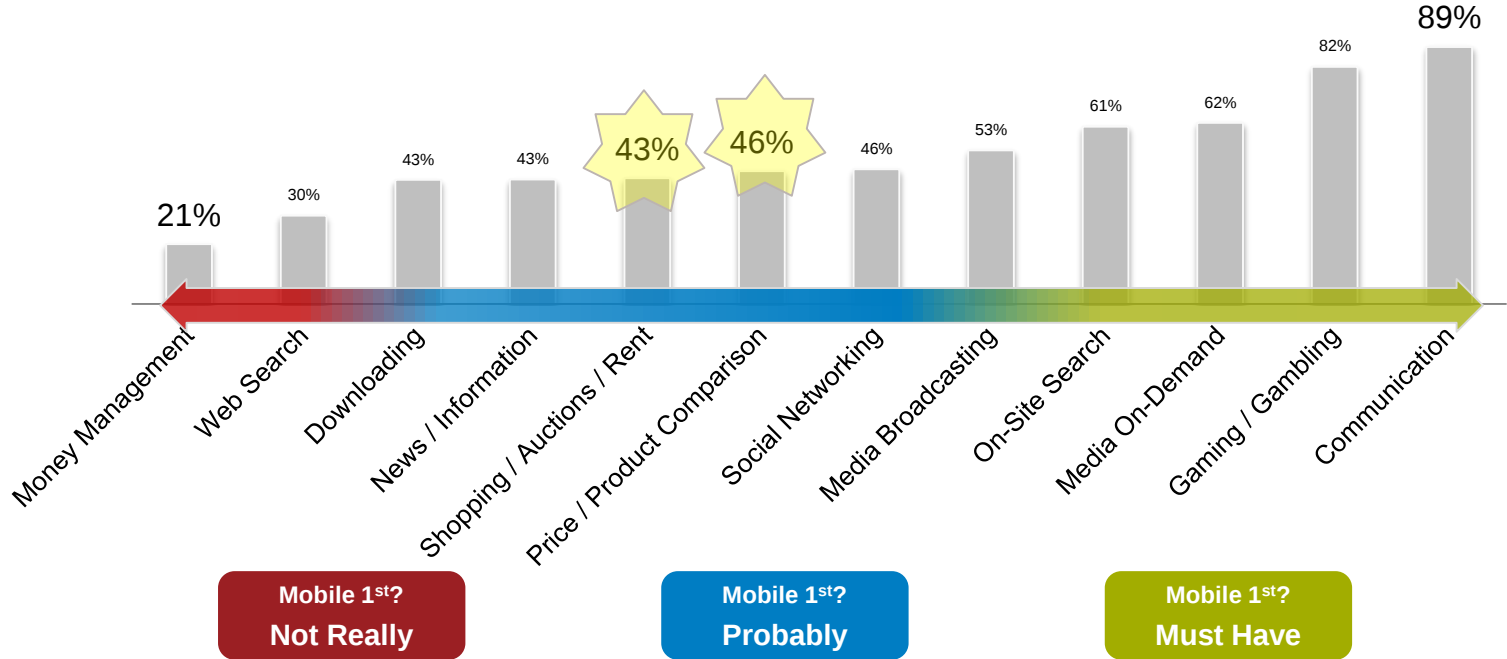
Mobile 1<sup>st</sup>?  
Must Have

\* Tablet & Smartphone

# Relevance of Mobile depends by **User Activity**

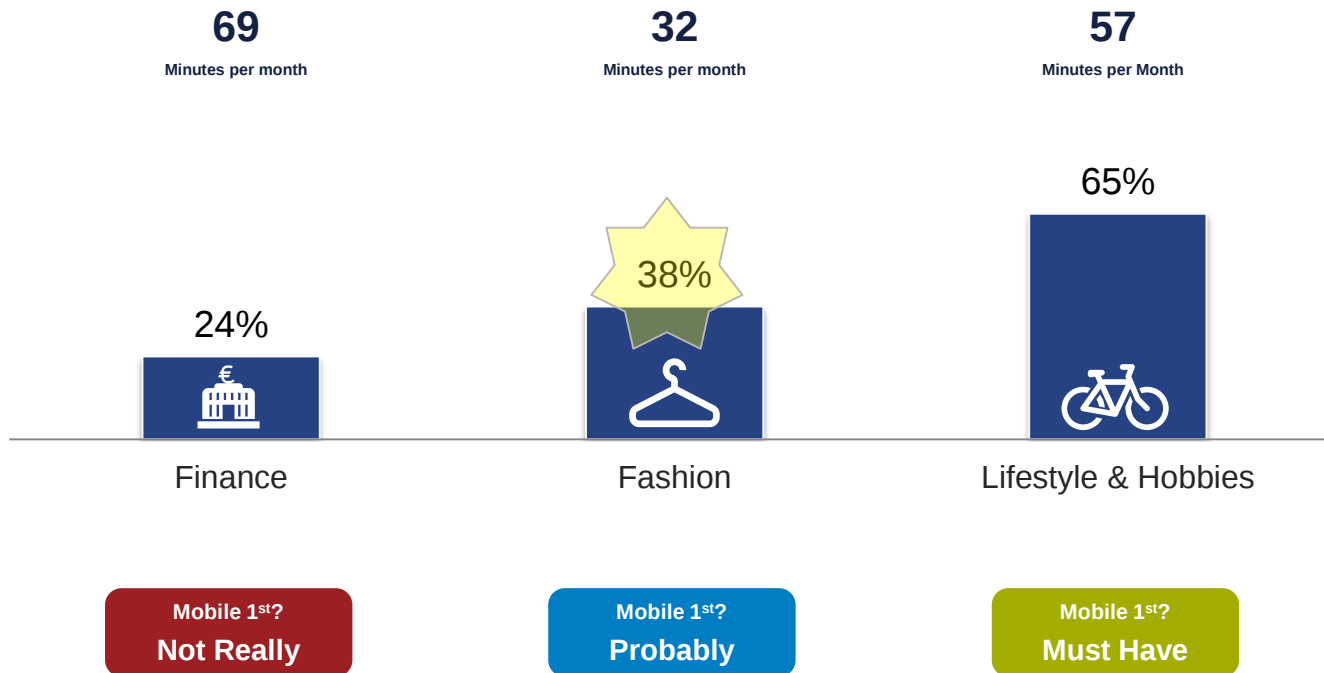
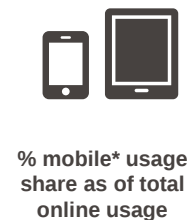


% mobile\* usage  
share as of total  
online usage



\* Tablet & Smartphone

# Relevance of Mobile depends by **Online Content**

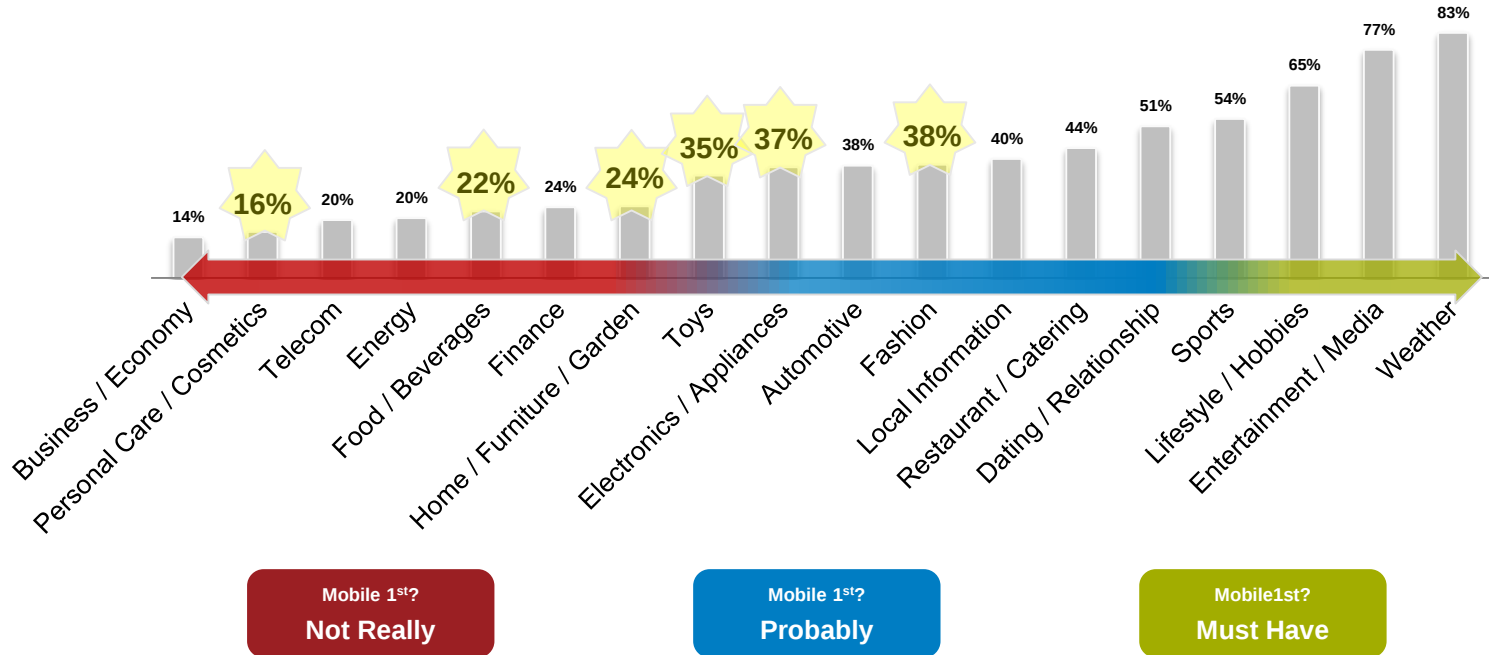


\* Tablet & Smartphone

# Relevance of Mobile depends by **Online Content**

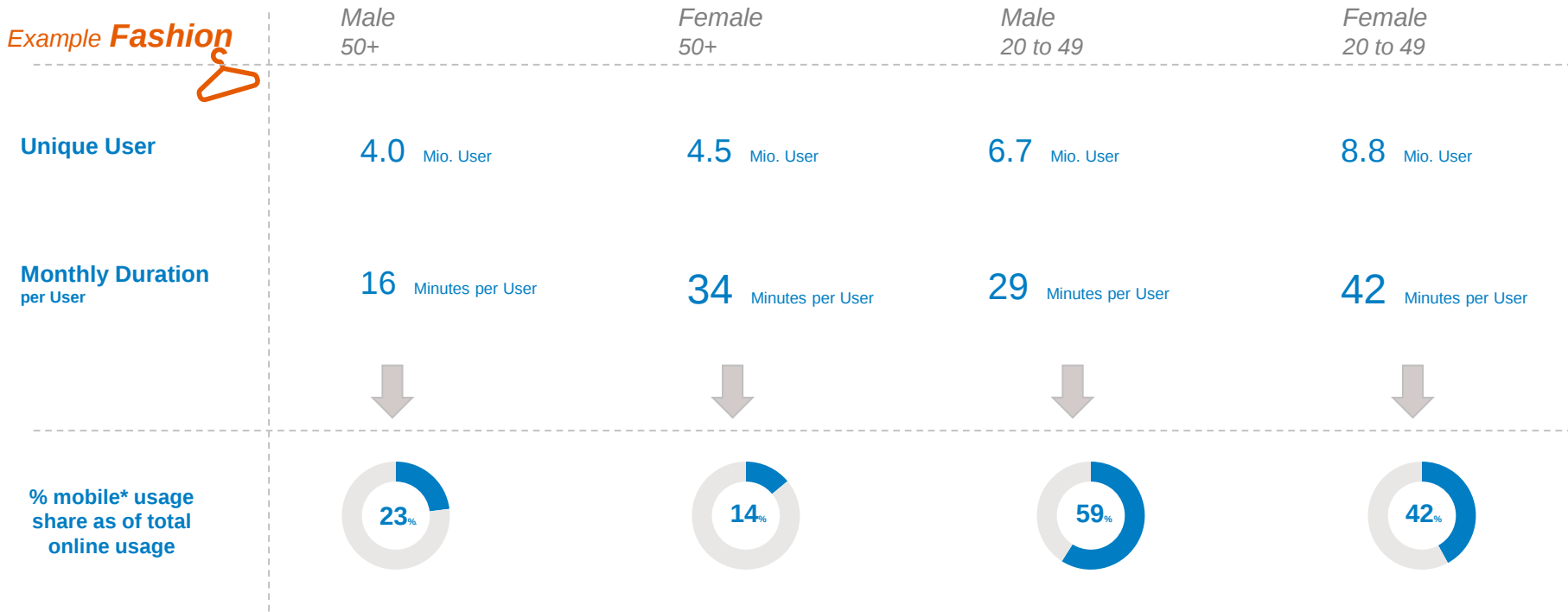


% mobile\* usage  
share as of total  
online usage



\* Tablet & Smartphone

## Also, target group potential needs to inform mobile 1st prioritization



# Also, target group potential needs to inform mobile 1st prioritization



Example **Fashion**



Unique User

Monthly Duration per User

Male  
50+

4.0 Mio. User

16 Minutes per User

Female  
50+

4.5 Mio. User

34 Minutes per User

Male  
20 to 49

6.7 Mio. User

29 Minutes per User

Female  
20 to 49

8.8 Mio. User

42 Minutes per User

Device Affinity

(Net Reach x Duration Index vs all Online)



Desktop



Smartphone



Tablet

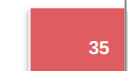
Low affinity ← → High affinity

54

152

58

156



107

223



162

145

Mobile 1st?  
Not Really

Mobile 1st?  
Not Really

Mobile 1st?  
Must Have

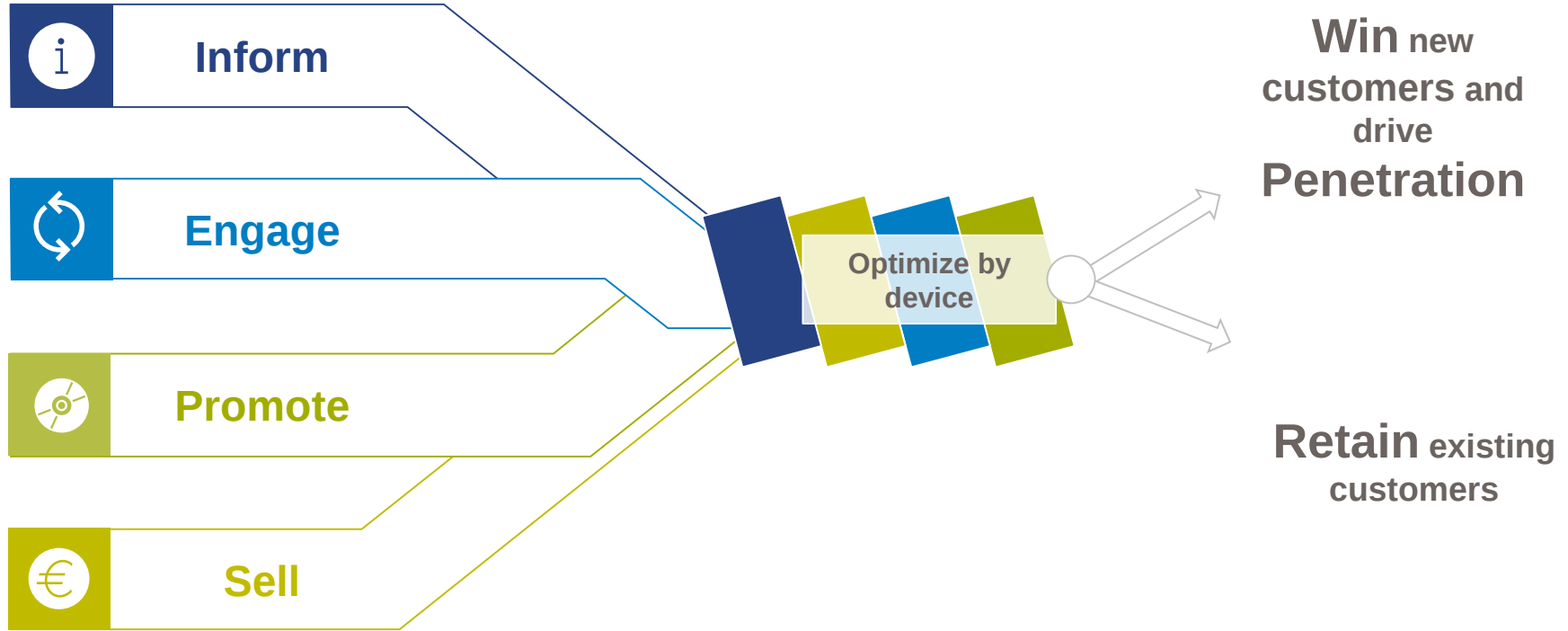
Mobile 1st?  
Must Have

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# Cross-Device User Growth?

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Digital assets provide exciting opportunities for retailers and manufacturers!



# User opportunity by business context



New Buyer  
Opportunity!

Monthly Unique User (in Mio.)



Engagement  
Opportunity!

Frequency of Usage (usage days)

1 Day

2 Days

3-5 Days

> 6 Days

Grocery



21



Fashion



26



Electronics |  
Appliances



15



Home | Furniture |  
Garden



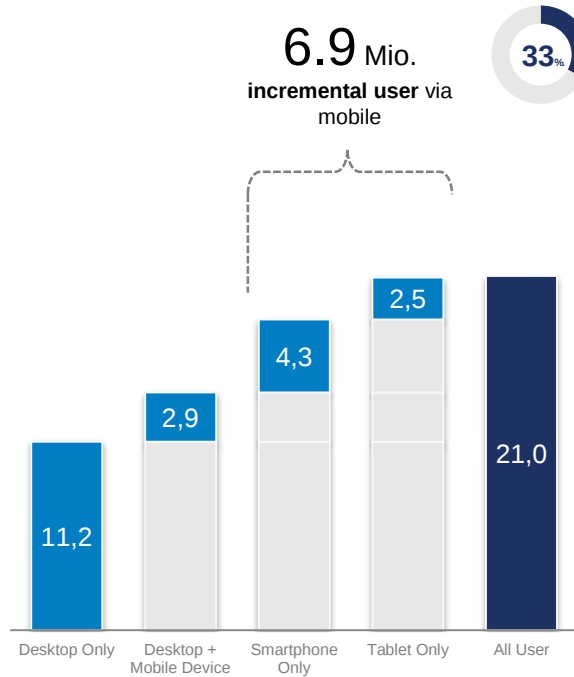
22



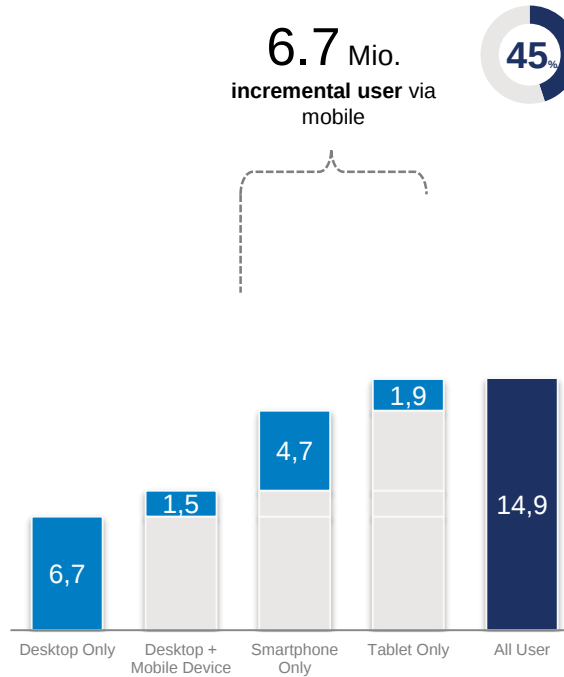
# Mobile devices significantly increase user reach!



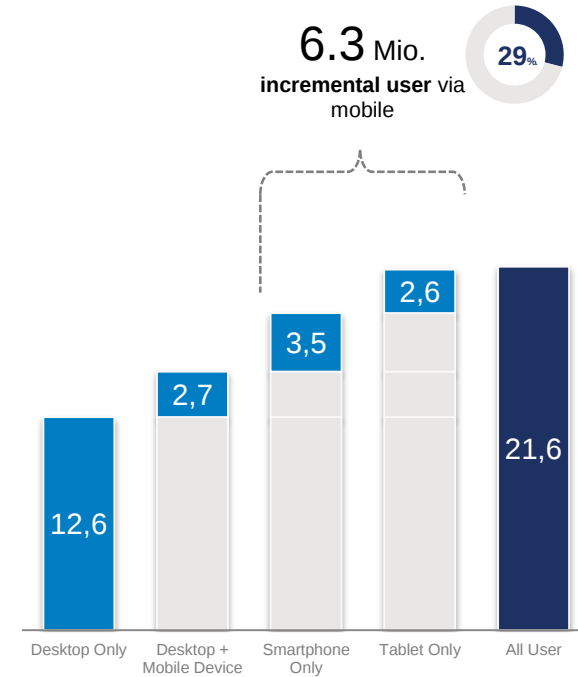
## Grocery



## Electronics



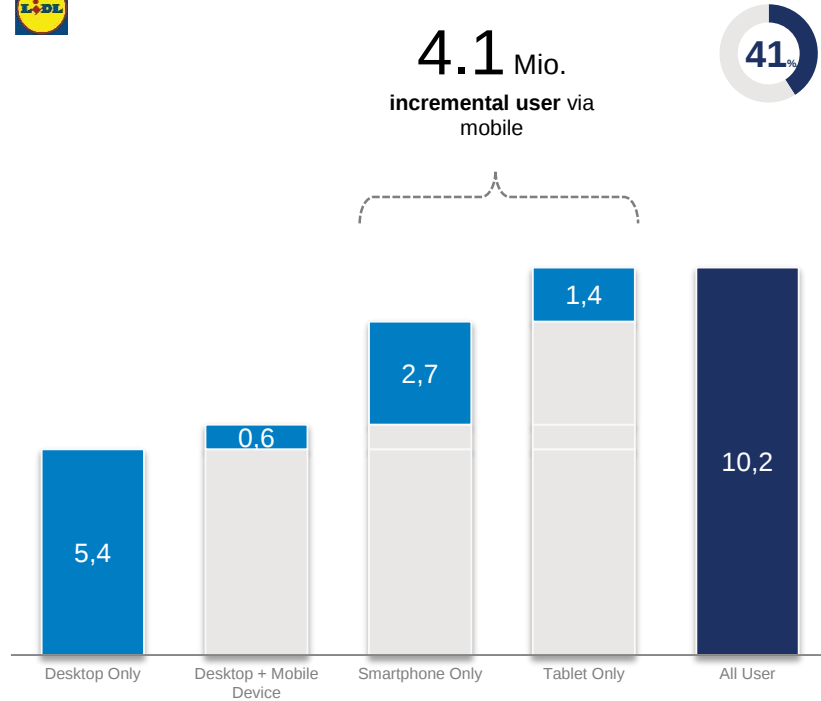
## Home | Furniture | Garden



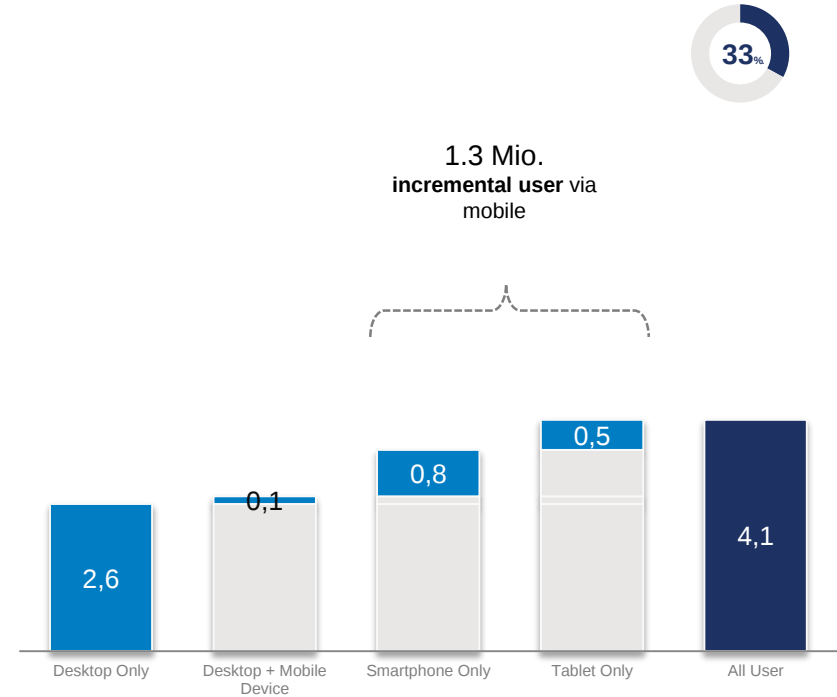
# Best Practice Example - Grocery



Best in Class - Lidl



Benchmark: Ø of top 2 to 6 ranked (by net reach) grocery retailer\*



\*real, dm, rossmann, rewe, netto

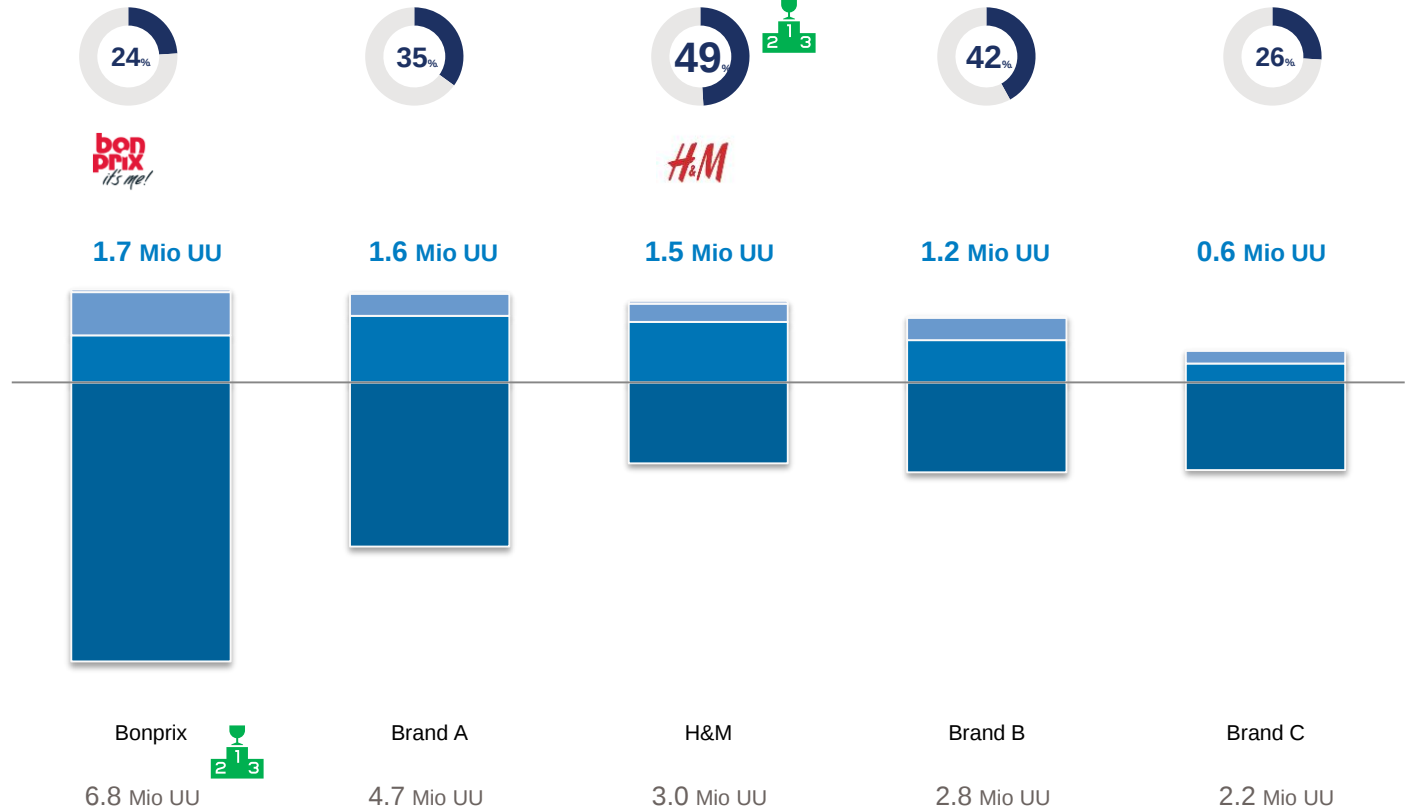
# Best Practice Example - Fashion



% of incremental mobile user of total user

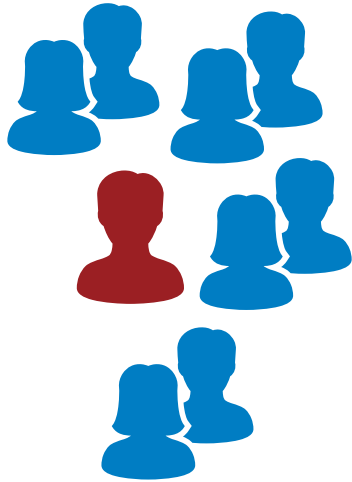
Smartphone & Tablet  
Tablet Only  
Smartphone Only

Desktop only + Desktop & Mobile



Monthly Unique User (in Mio.)





Mobile applications not just about incremental reach!  
But also about reaching different groups of  
consumers!

# Devices do attract significantly different consumer groups!

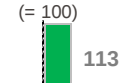
Example of different consumer profiles by device for:

**MediaMarkt**



Male

60%



Age <= 35y

31%



4+ Households

24%



HH Net Income > 3.000 Euro

29%



Adventurers

24%



Demanding

14%



Light TV Viewer

31%



■ Index > 100

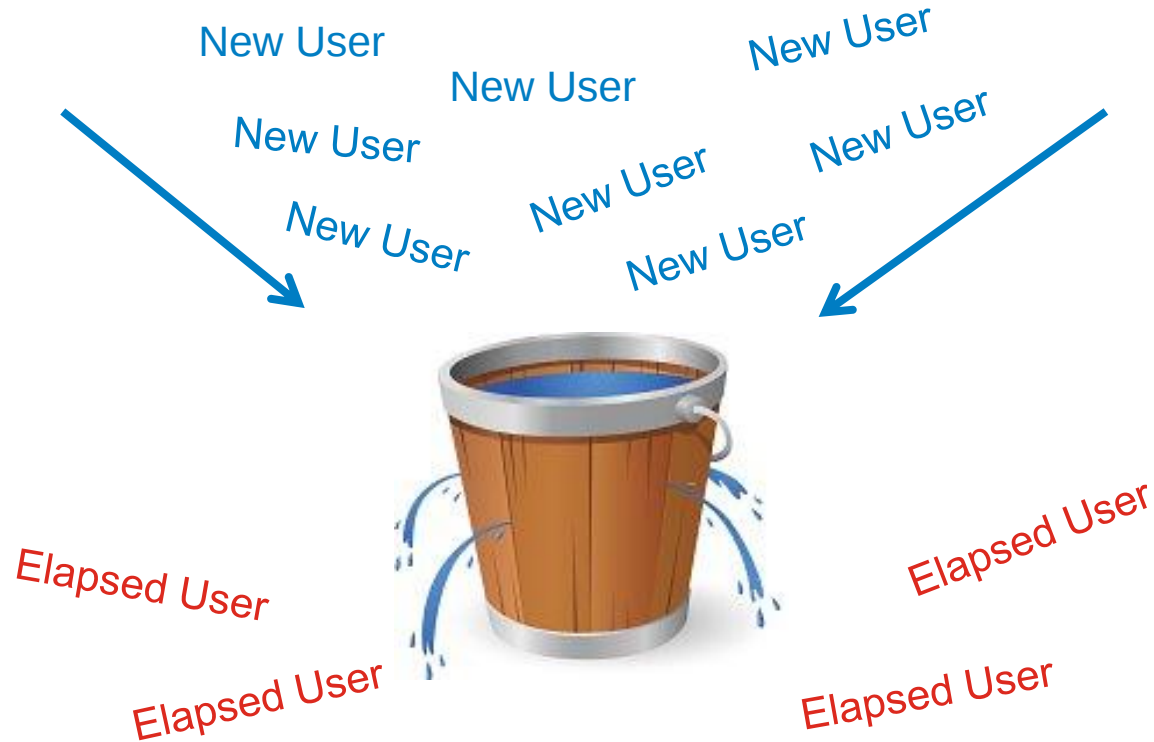
■ Index < 100

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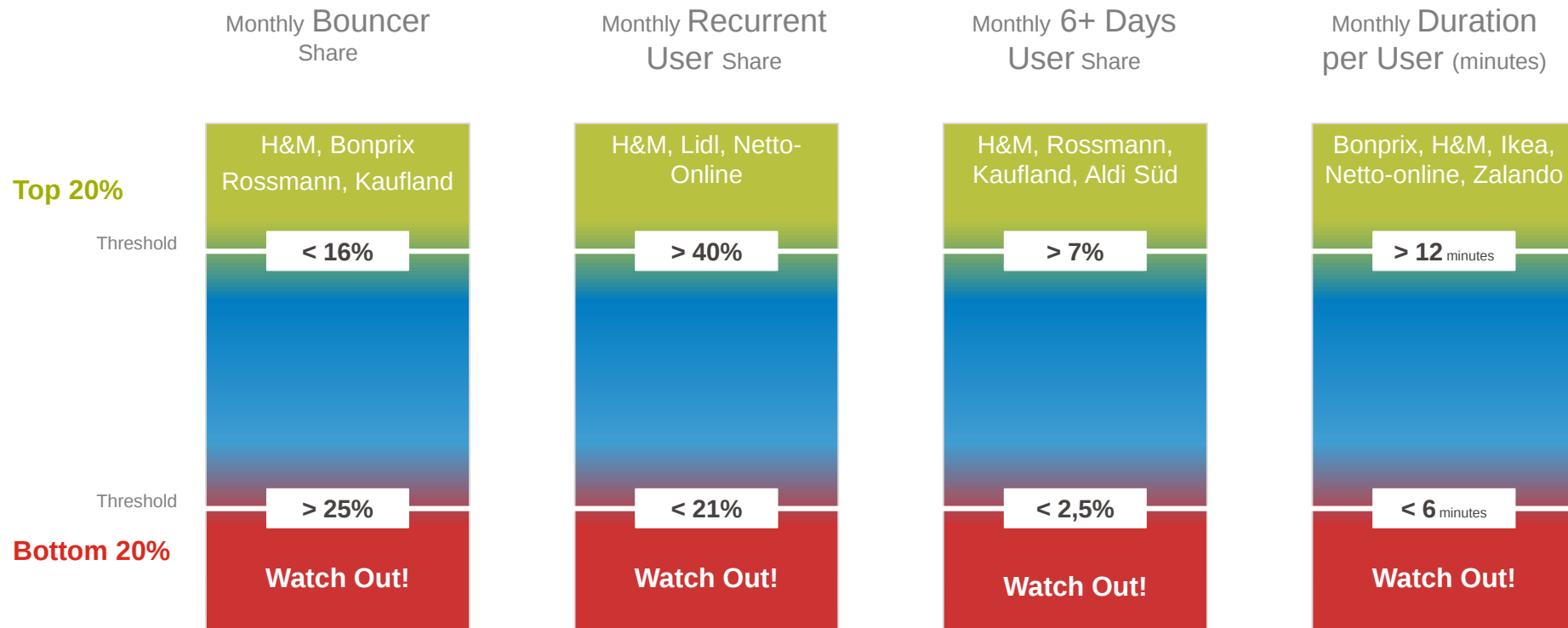
# Apps for Gaming and Chatting only?

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Reach without quality = wasted marketing investments



# Significant performance differences on User Quality!



# Apps can be tremendously successful in increasing user engagement!



# Apps are already fully learned and adopted in user activities such as ...



## 1. Communication



of these



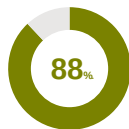
... Mio. people do use an App

**48** Mio. monthly  
Unique User

**41**



% App usage share as  
of total online usage

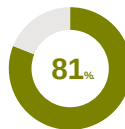


## 2. Gaming | Gambling



**41** Mio. monthly  
Unique User

**32**

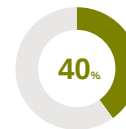


## 3. Social Networking



**46** Mio. monthly  
Unique User

**28**



# Also for retailers, apps can significantly increase user engagement



## for Grocery

## for Fashion

  
Monthly unique user  
(in Mio.)

  
Monthly Duration per User  
(in minutes)

  
Monthly unique user  
(in Mio.)

  
Monthly Duration per User  
(in minutes)

Across all Devices

21 Mio.

 20

26 Mio.

 32

 Desktop

14 Mio.

 22

18 Mio.

 28

 Smartphone

6.6 Mio.

 13

8.0 Mio.

 20

 Smartphone App

2.5 Mio.

 20

2.1 Mio.

 42

 Smartphone Browsing

4.6 Mio.

 8

2,5 x  
times

6.9 Mio.

 12

3,5 x  
times

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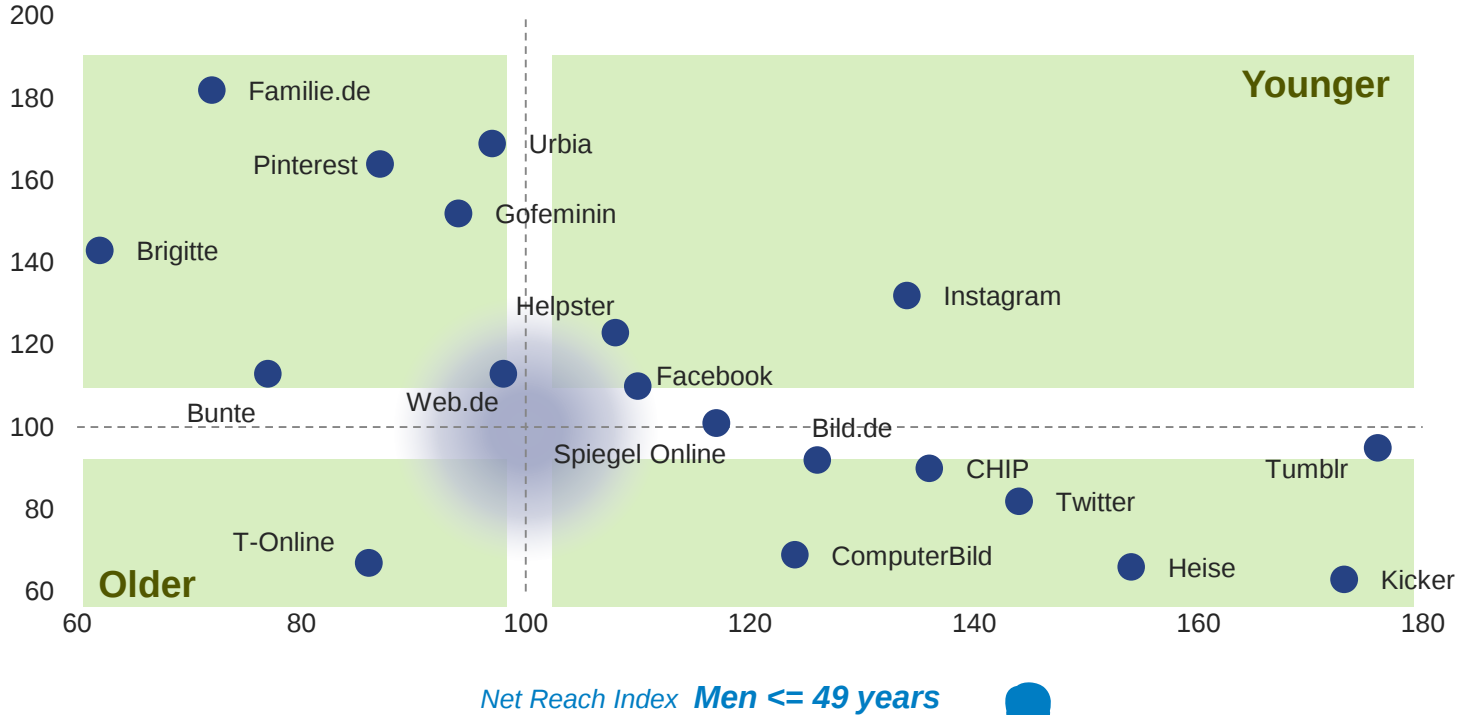
# Programmatic: what else?

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# From insights to strategic media planning



Net Reach Index **Women** <= 49 years



Net Reach Index **Men** <= 49 years



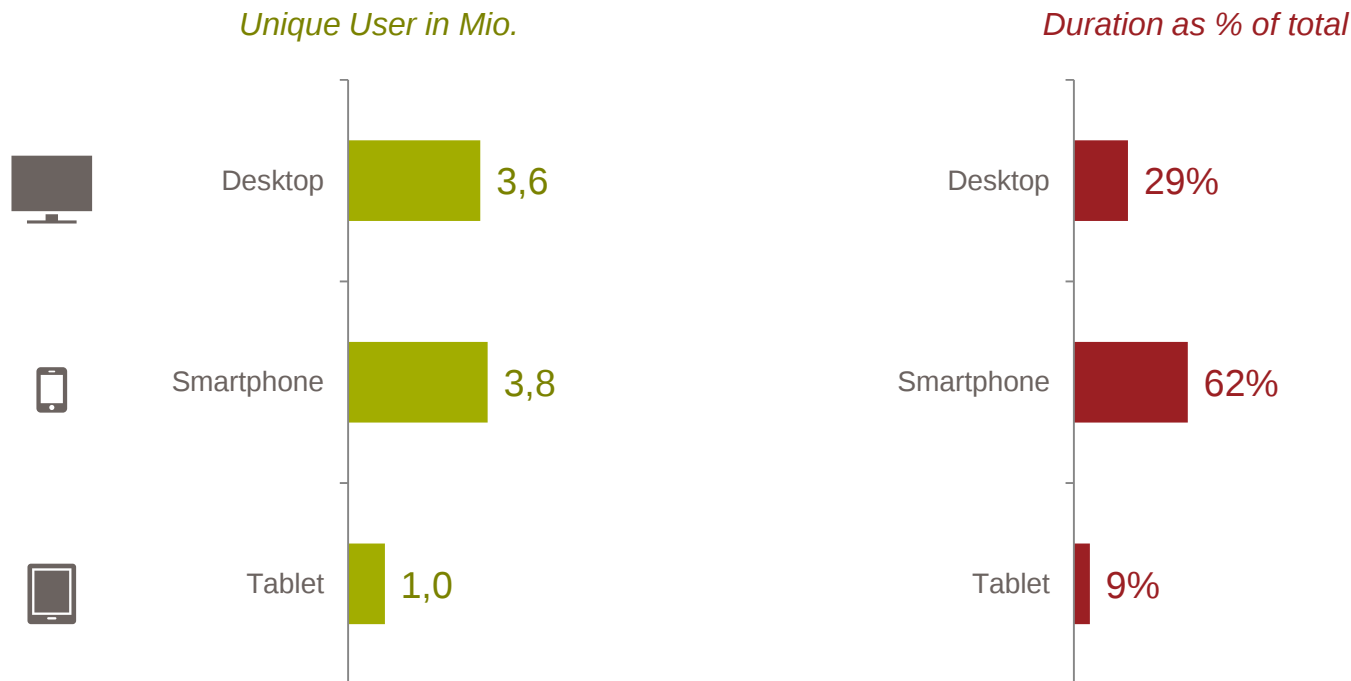
# Importantly, strategic media planning need to align with advertising format!



Total reach across  
all Websites | Apps\*

**7.2** Mio. Unique User  
Women <= 49 Years

\* familie.de, Pinterest, Urbia,  
Gofeminin, Bunte, Brigitte



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# Summary & Q&A

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# Where the information is coming from – GfK Crossmedia Visualizer



*Rich cross device insights for your business needs – at your finger print*

## Unique data foundation

Passive metered, behavioral data. For all devices.

Truly single source: cross-device measurement by person.

Based on GfK Consumer Panels, thus direct link to purchase, booking, etc. behavior

Comprehensive taxonomy of websites | apps by user activity, website content and business context

## Easy insights

Web-based tool which gives easy to access data and to use dashboard reporting's

Fully flexibility in slicing, dicing and grouping data (by websites | apps, target groups etc.)

Monthly, quarterly and bi-annual data reporting

Rich and custom target group information & competitive insights

*You would like to receive a free test access to GfK Crossmedia Visualizer, restricted to two week, than please contact us!*

# Und was kann ich als Werbetreibender mit den Ergebnissen machen?



**Verstehen Sie Ihre Zielgruppen besser**



**Leiten sie Informationen für relevanten Zielgruppen-Content ab**



**Erarbeiten Sie gemeinsam mit ihrer Media-Agentur tiefere Insights zur Strategischen (Online) Mediaplanung**



**Leiten Sie Benchmarks ab und erstellen sie Best practice Cases**



**Bewerten Sie Kooperationspartner hinsichtlich Ihrer Relevanz für bestimmte Zielgruppen**



**Überprüfen Sie die Relevanz und Besucherprofile von eCommerce-Seiten**



**Recherchieren Sie nützliche Daten zu “allgemeinen Online Trends” oder der Bedeutung von Mobile und Apps**



**Verknüpfen sie CMV KPIs mit Erkenntnissen aus der (eigenen) Web- und Wettbewerbsanalyse**

## Ihr Ansprechpartner



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Vielen Dank für Ihre Aufmerksamkeit