

## SURVEY FINDINGS AND METHODOLOGY

### Google / Ipsos : Apps for Business Growth Survey

#### Topline Findings

*These are the results of an Ipsos poll conducted in February and March 2023 for Google. For this survey, a sample of medium-to-large retailers in the US (N=150), UK (N=150) and Germany (n=150) were interviewed online in English and German. See full methodology at the end of the this document.*

**For complete results, please refer to the following annotated questionnaire:**

#### Full Annotated Questionnaire

Q1a. Overall, how satisfied are you with your company`s current mobile app performance? (Select one.)

	<b>Total (N=450)</b>
Top 2 box (Net)	88%
(5) Very satisfied	38%
(4) Somewhat satisfied	50%
(3) Not satisfied nor dissatisfied	8%
Bottom 2 box (Net)	5%
(2) Somewhat dissatisfied	4%
(1) Very dissatisfied	1%

Q1b. Which of the following mobile app stores is your company`s mobile app offered on? (Select all that apply.)

	<b>Total (N=450)</b>
Google Play Store (Android)	77%
Apple App Store (iOS)	81%
Microsoft Store (Windows)	34%
Amazon AppStore (Android)	35%
Huawei App Gallery (Android)	12%
Aptoide (Android)	10%
F-Droid (Android)	8%
Samsung Galaxy Store (Android)	35%

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Q2. Does your company pay for advertising or any kind of promotion for your mobile app? (Select one.)

	<b>Total (N=450)</b>
Yes, we pay to advertise/promote our mobile app	85%
No, we do not pay to advertise/promote our mobile app	15%

Q3. Which of the following ways does your company advertise and promote its` mobile app? (Select all that apply.)

	<b>Total (N=450)</b>
Discount codes or special coupons	28%
Exclusive in-app deals or personalized offers	34%
Early access to sales and new products	25%
Loyalty or point-based rewards (exchanged from app downloads, etc.)	22%
Search engine ads	42%
Display ads	30%
Social media ads	49%
App store ads (Google or Apple store promotion, etc.)	42%
Referral program	20%
Company website, blog, and/or online communities	55%
Email marketing	57%
In-store advertising (signs, displays, etc.)	32%
Search Engine Optimization (SEO)	50%
App Store Optimization (ASO)	38%
Creating immersive experiences for app users	20%
Other (Specify)	1%

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Q4. Which of the following mobile app stores do you pay to promote on? (Select all that apply.)

	<b>Total (N=188)</b>
Google Play Store (Android)	76%
Apple App Store (iOS)	87%
Microsoft Store (Windows)	24%
Amazon AppStore (Android)	22%
Huawei App Gallery (Android)	5%
Aptoide (Android)	6%
F-Droid (Android)	7%
Samsung Galaxy Store (Android)	24%
None of the above	1%

Q5\_\_scale. [ Discount codes or special coupons ] Out of the various ways your company promotes its` mobile app, which has the best Return on Marketing Investment (ROI/ROMI)? Please rank the types of promotion you use, with "Rank 1" being the best, and so forth.

	<b>Total (N=124)</b>
Rank 1	13%
Rank 2	15%
Rank 3	16%

Q5\_\_scale. [ Exclusive in-app deals or personalized offers ] Out of the various ways your company promotes its` mobile app, which has the best Return on Marketing Investment (ROI/ROMI)? Please rank the types of promotion you use, with "Rank 1" being the best, and so forth.

	<b>Total (N=154)</b>
Rank 1	20%
Rank 2	14%
Rank 3	14%

Q5\_\_scale. [ Early access to sales and new products ] Out of the various ways your company promotes its` mobile app, which has the best Return on Marketing Investment (ROI/ROMI)? Please rank the types of promotion you use, with "Rank 1" being the best, and so forth.

	<b>Total (N=114)</b>
Rank 1	8%
Rank 2	10%
Rank 3	19%

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Q5\_\_scale. [ Loyalty or point-based rewards (exchanged from app downloads, etc.) ] Out of the various ways your company promotes its` mobile app, which has the best Return on Marketing Investment (ROI/ROMI)? Please rank the types of promotion you use, with “Rank 1” being the best, and so forth.

	<b>Total (N=97)</b>
Rank 1	18%
Rank 2	12%
Rank 3	13%

Q5\_\_scale. [ Search engine ads ] Out of the various ways your company promotes its` mobile app, which has the best Return on Marketing Investment (ROI/ROMI)? Please rank the types of promotion you use, with “Rank 1” being the best, and so forth.

	<b>Total (N=190)</b>
Rank 1	20%
Rank 2	17%
Rank 3	17%

Q5\_\_scale. [ Display ads ] Out of the various ways your company promotes its` mobile app, which has the best Return on Marketing Investment (ROI/ROMI)? Please rank the types of promotion you use, with “Rank 1” being the best, and so forth.

	<b>Total (N=135)</b>
Rank 1	6%
Rank 2	17%
Rank 3	13%

Q5\_\_scale. [ Social media ads ] Out of the various ways your company promotes its` mobile app, which has the best Return on Marketing Investment (ROI/ROMI)? Please rank the types of promotion you use, with “Rank 1” being the best, and so forth.

	<b>Total (N=219)</b>
Rank 1	21%
Rank 2	19%
Rank 3	15%

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Q5\_\_scale. [ App store ads (Google or Apple store promotion, etc.) ] Out of the various ways your company promotes its` mobile app, which has the best Return on Marketing Investment (ROI/ROMI)? Please rank the types of promotion you use, with “Rank 1” being the best, and so forth.

	<b>Total (N=188)</b>
Rank 1	29%
Rank 2	22%
Rank 3	13%

Q5\_\_scale. [ Referral program ] Out of the various ways your company promotes its` mobile app, which has the best Return on Marketing Investment (ROI/ROMI)? Please rank the types of promotion you use, with “Rank 1” being the best, and so forth.

	<b>Total (N=90)</b>
Rank 1	16%
Rank 2	13%
Rank 3	10%

Q5\_\_scale. [ Company website, blog, and/or online communities ] Out of the various ways your company promotes its` mobile app, which has the best Return on Marketing Investment (ROI/ROMI)? Please rank the types of promotion you use, with “Rank 1” being the best, and so forth.

	<b>Total (N=246)</b>
Rank 1	20%
Rank 2	16%
Rank 3	19%

Q5\_\_scale. [ Email marketing ] Out of the various ways your company promotes its` mobile app, which has the best Return on Marketing Investment (ROI/ROMI)? Please rank the types of promotion you use, with “Rank 1” being the best, and so forth.

	<b>Total (N=256)</b>
Rank 1	21%
Rank 2	20%
Rank 3	16%

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Q5\_\_scale. [ In-store advertising (signs, displays, etc.) ] Out of the various ways your company promotes its` mobile app, which has the best Return on Marketing Investment (ROI/ROMI)? Please rank the types of promotion you use, with "Rank 1" being the best, and so forth.

	<b>Total (N=145)</b>
Rank 1	15%
Rank 2	13%
Rank 3	22%

Q5\_\_scale. [ Search Engine Optimization (SEO) ] Out of the various ways your company promotes its` mobile app, which has the best Return on Marketing Investment (ROI/ROMI)? Please rank the types of promotion you use, with "Rank 1" being the best, and so forth.

	<b>Total (N=223)</b>
Rank 1	18%
Rank 2	21%
Rank 3	18%

Q5\_\_scale. [ App Store Optimization (ASO) ] Out of the various ways your company promotes its` mobile app, which has the best Return on Marketing Investment (ROI/ROMI)? Please rank the types of promotion you use, with "Rank 1" being the best, and so forth.

	<b>Total (N=172)</b>
Rank 1	20%
Rank 2	25%
Rank 3	10%

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Q6. You said that ... has the best Return on Marketing Investment (ROI/ROMI). Why is this promotion method preferred? (Select all that apply.) I prefer this promotion method because it...

	<b>Total (N=450)</b>
Reaches my target market most efficiently	48%
Effectively communicates the product's value	37%
Reaches a large audience	47%
Is trusted by the customer / viewed as credible	44%
Generates repeat buyers (i.e. improves customer loyalty)	34%
It is measurable	44%
Effectively re-engages existing app users	39%
Sustainable growth in downloads	28%
Allows for incremental sales growth	32%
Other (Specify)	1%

Q7. Thinking of your company's satisfaction with its current mobile app advertising investment, which of the following statements below is most likely when considering how the investment will change for the next planned fiscal year? (Select one.) My company plans to invest...

	<b>Total (N=450)</b>
More in mobile app promotion	52%
Just as much in mobile app promotion	38%
Less into mobile app promotion	7%
Unsure	3%

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Q7B. You said your company plans to invest more in mobile app promotion. Why is this?

	<b>Total (N=232)</b>
Improves customer retention	42%
Increases customer engagement (WAU/MAU)	35%
Reduces churn rate	26%
Incremental increase of sales (from current customers buying more)	41%
Incremental increase of sales (from gaining new customers)	33%
...Streamlines the shopping process for customers Offering features such as in-app shopping carts, product recommendations, etc.	23%
Serves as an effective or seamless omnichannel solution	22%
Have first-party customer data (via app) to comply with third-party privacy sharing laws	34%
Gives access to customer feedback / perspective	19%
Reinforces brand and image	33%
Increases brand awareness	28%
Builds brand loyalty	41%
Creates buzz / word-of-mouth / recommendations	16%
Grows offline sales	19%
Grows online sales	48%
Increases profitability	34%
Increases average purchase value (APV)	23%
Helps increase customer purchase frequency	36%
Other (Specify)	0%



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Q8. Which of the following is most important to your company when considering long-term business success? (Select up to 5 most important things to your company.)

	<b>Total (N=450)</b>
Improve customer retention	33%
Increase customer engagement (WAU/MAU)	19%
Reduce churn rate	19%
Incremental increase of sales (from current customers buying more)	23%
Incremental increase of sales (from gaining new customers)	27%
...Streamline the shopping process for customers Offering features such as in-app shopping carts, product recommendations, etc.	16%
An effective or seamless omnichannel solution	15%
Have first-party customer data (via website or in-store)	18%
Have first-party customer data (via app) to comply with third-party privacy sharing laws	19%
Have access to customer feedback / perspective	12%
Reinforce brand and image	23%
Increase brand awareness	24%
Build brand loyalty	35%
Create buzz / word-of-mouth / recommendations	12%
Grow offline sales	13%
Grow online sales	33%
Increase profitability	34%
Increase average purchase value (APV)	18%
Help increase customer purchase frequency	17%
Other (Specify)	0%

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Q9. Overall, how important is your business's app to the company's success? (Select one.)

	<b>Total (N=450)</b>
Top 3 box (Net)	96%
Top 2 box (Net)	77%
(5) Extremely important	39%
(4) Very important	38%
(3) Somewhat important	19%
(2) Not very important	4%

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Q10. Now looking at the following list, what value does your business currently get from having a mobile app? (Select all that apply.)

	<b>Total (N=450)</b>
Improves customer retention	41%
Increases customer engagement (WAU/MAU)	31%
Reduces churn rate	26%
Incremental increase of sales (from current customers buying more)	31%
Incremental increase of sales (from gaining new customers)	24%
Improved Omnichannel Experience (Net)	36%
...Streamlines the shopping process for customers Offering features such as in-app shopping carts, product recommendations, etc.	23%
Serves as an effective or seamless omnichannel solution	23%
Customer Insights (Net)	39%
Have first-party customer data (via app) to comply with third-party privacy sharing laws	29%
Gives access to customer feedback / perspective	20%
Reinforces brand and image	32%
Increases brand awareness	26%
Builds brand loyalty	38%
Creates buzz / word-of-mouth / recommendations	16%
Grows offline sales	15%
Grows online sales	42%
Increases profitability	28%
Increases average purchase value (APV)	20%
Helps increase customer purchase frequency	30%
Other (Specify)	1%

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Q11[...].\_scale. [ Reaches my target market most efficiently ] Which type of promotion (paid vs. organic) is best at achieving each of the following promotion benefits shown below? (Select one for each.)

	<b>Total (N=215)</b>
Paid promotion	51%
Organic promotion	26%
Both are equal for achieving this	23%

Q11[...].\_scale. [ Effectively communicates the product's value ] Which type of promotion (paid vs. organic) is best at achieving each of the following promotion benefits shown below? (Select one for each.)

	<b>Total (N=166)</b>
Paid promotion	37%
Organic promotion	22%
Both are equal for achieving this	41%

Q11[...].\_scale. [ Reaches a large audience ] Which type of promotion (paid vs. organic) is best at achieving each of the following promotion benefits shown below? (Select one for each.)

	<b>Total (N=210)</b>
Paid promotion	60%
Organic promotion	18%
Both are equal for achieving this	22%

Q11[...].\_scale. [ Is trusted by the customer / viewed as credible ] Which type of promotion (paid vs. organic) is best at achieving each of the following promotion benefits shown below? (Select one for each.)

	<b>Total (N=200)</b>
Paid promotion	18%
Organic promotion	50%
Both are equal for achieving this	32%

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Q11[...].\_scale. [ Generates repeat buyers (i.e. improves customer loyalty) ] Which type of promotion (paid vs. organic) is best at achieving each of the following promotion benefits shown below? (Select one for each.)

	<b>Total (N=155)</b>
Paid promotion	30%
Organic promotion	41%
Both are equal for achieving this	29%

Q11[...].\_scale. [ It is measurable ] Which type of promotion (paid vs. organic) is best at achieving each of the following promotion benefits shown below? (Select one for each.)

	<b>Total (N=200)</b>
Paid promotion	49%
Organic promotion	13%
Both are equal for achieving this	39%

Q11[...].\_scale. [ Effectively re-engages existing app users ] Which type of promotion (paid vs. organic) is best at achieving each of the following promotion benefits shown below? (Select one for each.)

	<b>Total (N=175)</b>
Paid promotion	44%
Organic promotion	31%
Both are equal for achieving this	25%

Q11[...].\_scale. [ Sustainable growth in downloads ] Which type of promotion (paid vs. organic) is best at achieving each of the following promotion benefits shown below? (Select one for each.)

	<b>Total (N=128)</b>
Paid promotion	43%
Organic promotion	28%
Both are equal for achieving this	29%

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Q11[...].\_scale. [ Allows for incremental sales growth ] Which type of promotion (paid vs. organic) is best at achieving each of the following promotion benefits shown below? (Select one for each.)

	<b>Total (N=145)</b>
Paid promotion	43%
Organic promotion	17%
Both are equal for achieving this	41%

Q11[...].\_scale. [ ... ] Which type of promotion (paid vs. organic) is best at achieving each of the following promotion benefits shown below? (Select one for each.)

	<b>Total (N=6)</b>
Paid promotion	33%
Organic promotion	50%
Both are equal for achieving this	17%

Q12. When thinking of why your company ..., what are the top reasons? (Select up to 5 reasons.)

	<b>Total (N=450)</b>
Budget constraints	39%
Fear of failure	10%
Organic growth is preferred (SEO, reviews, word-of-mouth, etc.)	24%
Lack of control over messaging	12%
Limited competition in my sector	12%
Market is too niche	12%
App performance / engagement is poor	16%
Unable to accurately measure in-app performance (ex. conversions)	19%
It is not a priority	16%
Focused on investing in other channels	29%
Technical limitations	22%
Lack of resources	23%
Cost to keep apps running	18%
Organizational silos (between marketing, developer, app teams)	18%
Have paid to promote in the past, and the results were not worth the investment	16%
Other (Specify)	1%
None of the above	4%

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Q13. What does your app user typically do on your company's mobile app? (Select all that apply.)

	<b>Total (N=450)</b>
View / browse products	44%
Compare prices and features of different products	25%
Add items to a virtual shopping cart	31%
Place an order and make payment	43%
Contact customer support/access a chatbot for assistance	30%
Manage account information, such as shipping and billing addresses	33%
View order history	32%
Check order status and track deliveries	35%
Read or leave product reviews and ratings	29%
Check product availability in store	24%
Find store locations and hours	23%
Receive notifications about sales, discounts, and special offers	32%
Receive custom product recommendations based on user profile	24%
Receive custom alerts / notifications tailored to user profile	27%
Create "lists" (e.g. wishlists, shopping lists, etc.)	22%
Personalize their setting options (i.e. Create a profile, select a user photo, etc.)	26%
Access special deals and promotions only available to app users	28%
Receive app notifications (shipping status, new products, etc.)	34%
Other (Specify)	2%

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Q14. Which of the following ways, if any, are your company's mobile app being used by the consumer for their in-store shopping experience? (Select all that apply.) The average customer uses our mobile app while in-store to....

	<b>Total (N=275)</b>
Compare prices	31%
Order out-of-stock items	24%
Make mobile payments	36%
Gain loyalty points / awards	36%
Check inventory	31%
Navigate in-store	26%
Retrieve product information / reviews	40%
Receive personal recommendations	29%
Retrieve mobile coupons	34%
Other (Specify)	1%
None of the above	7%

Q15[...].scale. [ Make more purchases than those who do not use the app ] To what extent do you agree or disagree with the following statements? (Select one for each.) Customers who use our app tend to...

	<b>Total (N=450)</b>
Top 2 box (Net)	83%
(5) Strongly agree	38%
(4) Somewhat agree	45%
(3) Neither agree or disagree	13%
Bottom 2 box (Net)	4%
(2) Somewhat disagree	4%
(1) Strongly disagree	1%



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Q15[...].\_scale. [ Remain loyal with us longer than those who do not use the app ] To what extent do you agree or disagree with the following statements? (Select one for each.) Customers who use our app tend to...

	<b>Total (N=450)</b>
Top 2 box (Net)	85%
(5) Strongly agree	36%
(4) Somewhat agree	49%
(3) Neither agree or disagree	12%
Bottom 2 box (Net)	3%
(2) Somewhat disagree	2%
(1) Strongly disagree	1%

Q15[...].\_scale. [ Make more repeat purchases than those who do not use the app ] To what extent do you agree or disagree with the following statements? (Select one for each.) Customers who use our app tend to...

	<b>Total (N=450)</b>
Top 2 box (Net)	82%
(5) Strongly agree	35%
(4) Somewhat agree	47%
(3) Neither agree or disagree	12%
Bottom 2 box (Net)	5%
(2) Somewhat disagree	4%
(1) Strongly disagree	1%

Q15[...].\_scale. [ Have higher average basket ring (# of items purchased) than those who make purchases ... ] To what extent do you agree or disagree with the following statements? (Select one for each.) Customers who use our app tend to...

	<b>Total (N=450)</b>
Top 2 box (Net)	72%
(5) Strongly agree	35%
(4) Somewhat agree	37%
(3) Neither agree or disagree	21%
Bottom 2 box (Net)	7%
(2) Somewhat disagree	6%
(1) Strongly disagree	1%

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Q15[...].\_scale. [ Receive a more personalized shopping experience than those who do not use the app ] To what extent do you agree or disagree with the following statements? (Select one for each.) Customers who use our app tend to...

	<b>Total (N=450)</b>
Top 2 box (Net)	80%
(5) Strongly agree	35%
(4) Somewhat agree	44%
(3) Neither agree or disagree	15%
Bottom 2 box (Net)	6%
(2) Somewhat disagree	4%
(1) Strongly disagree	1%

Q15[...].\_scale. [ Have a smaller conversion window to purchase than those who do not use the app ] To what extent do you agree or disagree with the following statements? (Select one for each.) Customers who use our app tend to...

	<b>Total (N=450)</b>
Top 2 box (Net)	71%
(5) Strongly agree	28%
(4) Somewhat agree	42%
(3) Neither agree or disagree	21%
Bottom 2 box (Net)	8%
(2) Somewhat disagree	7%
(1) Strongly disagree	1%

Q15[...].\_scale. [ Use the app in-store to improve shopping experience ] To what extent do you agree or disagree with the following statements? (Select one for each.) Customers who use our app tend to...

	<b>Total (N=450)</b>
Top 2 box (Net)	65%
(5) Strongly agree	27%
(4) Somewhat agree	38%
(3) Neither agree or disagree	19%
Bottom 2 box (Net)	15%
(2) Somewhat disagree	8%
(1) Strongly disagree	7%

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Q15[...].\_scale. [ Have shorter consumer journeys (due to more personalized experience, etc.) than those who do not use the app ] To what extent do you agree or disagree with the following statements? (Select one for each.) Customers who use our app tend to...

	<b>Total (N=450)</b>
Top 2 box (Net)	78%
(5) Strongly agree	35%
(4) Somewhat agree	43%
(3) Neither agree or disagree	17%
Bottom 2 box (Net)	5%
(2) Somewhat disagree	4%
(1) Strongly disagree	1%

Q15[...].\_scale. [ Be more satisfied with their experiences shopping with us than those who do not use the app ] To what extent do you agree or disagree with the following statements? (Select one for each.) Customers who use our app tend to...

	<b>Total (N=450)</b>
Top 2 box (Net)	75%
(5) Strongly agree	32%
(4) Somewhat agree	43%
(3) Neither agree or disagree	20%
Bottom 2 box (Net)	5%
(2) Somewhat disagree	4%
(1) Strongly disagree	1%

Q16. During periods of economic uncertainty, how important is it for your company to focus on customer retention? (Select one.)

	<b>Total (N=450)</b>
Top 2 box (Net)	88%
(5) Extremely important	56%
(4) Very important	32%
(3) Somewhat important	11%
Bottom 2 box (Net)	1%
(2) Not very important	1%

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Q17. During periods of economic uncertainty, how valuable is it for your company to have a mobile app? (Select one.)

	<b>Total (N=450)</b>
Top 2 box (Net)	75%
(5) Extremely Valuable	37%
(4) Very Valuable	38%
(3) Somewhat Valuable	23%
Bottom 2 box (Net)	2%
(2) Very Poor Value	1%
(1) Not Valuable At All	0%

Q18[...].\_scale. [ Improve customer retention ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with "Rank 1" being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=147)</b>
Rank 1	42%
Rank 2	25%
Rank 3	16%

Q18[...].\_scale. [ Increase customer engagement (WAU/MAU) ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with "Rank 1" being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=85)</b>
Rank 1	22%
Rank 2	25%
Rank 3	24%

Q18[...].\_scale. [ Reduce churn rate ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with "Rank 1" being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=86)</b>
Rank 1	23%
Rank 2	31%
Rank 3	17%

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Q18[...].\_scale. [ Incremental increase of sales (from current customers buying more) ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with “Rank 1” being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=104)</b>
Rank 1	21%
Rank 2	29%
Rank 3	22%

Q18[...].\_scale. [ Incremental increase of sales (from gaining new customers) ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with “Rank 1” being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=121)</b>
Rank 1	17%
Rank 2	23%
Rank 3	22%

Q18[...].\_scale. [ ... Streamline the shopping process for customers Offering features such as in-app shopping carts, product recommendations, etc. ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with “Rank 1” being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=72)</b>
Rank 1	28%
Rank 2	13%
Rank 3	18%

Q18[...].\_scale. [ An effective or seamless omnichannel solution ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with “Rank 1” being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=68)</b>
Rank 1	22%
Rank 2	13%
Rank 3	16%

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Q18[...].\_scale. [ Have first-party customer data (via website or in-store) ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with “Rank 1” being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=82)</b>
Rank 1	21%
Rank 2	15%
Rank 3	28%

Q18[...].\_scale. [ Have first-party customer data (via app) to comply with third-party privacy sharing laws ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with “Rank 1” being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=87)</b>
Rank 1	18%
Rank 2	18%
Rank 3	22%

Q18[...].\_scale. [ Have access to customer feedback / perspective ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with “Rank 1” being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=52)</b>
Rank 1	21%
Rank 2	21%
Rank 3	25%

Q18[...].\_scale. [ Reinforce brand and image ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with “Rank 1” being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=103)</b>
Rank 1	12%
Rank 2	30%
Rank 3	20%

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Q18[...].\_scale. [ Increase brand awareness ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with “Rank 1” being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=108)</b>
Rank 1	23%
Rank 2	22%
Rank 3	19%

Q18[...].\_scale. [ Build brand loyalty ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with “Rank 1” being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=159)</b>
Rank 1	25%
Rank 2	20%
Rank 3	26%

Q18[...].\_scale. [ Create buzz / word-of-mouth / recommendations ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with “Rank 1” being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=55)</b>
Rank 1	15%
Rank 2	16%
Rank 3	15%

Q18[...].\_scale. [ Grow offline sales ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with “Rank 1” being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=57)</b>
Rank 1	25%
Rank 2	21%
Rank 3	18%

## SURVEY FINDINGS AND METHODOLOGY

Q18[...].\_scale. [ Grow online sales ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with “Rank 1” being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=150)</b>
Rank 1	28%
Rank 2	30%
Rank 3	21%

Q18[...].\_scale. [ Increase profitability ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with “Rank 1” being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=154)</b>
Rank 1	34%
Rank 2	20%
Rank 3	23%

Q18[...].\_scale. [ Increase average purchase value (APV) ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with “Rank 1” being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=83)</b>
Rank 1	27%
Rank 2	23%
Rank 3	22%

Q18[...].\_scale. [ Help increase customer purchase frequency ] During periods of economic uncertainty, which of the following provides the most value? Please rank the following, with “Rank 1” being the most valuable during periods of uncertainty, and so forth.

	<b>Total (N=77)</b>
Rank 1	14%
Rank 2	36%
Rank 3	22%



## SURVEY FINDINGS AND METHODOLOGY

Q19[...].\_scale. [ Mobile apps drive traffic to our ... ] Please indicate your level of agreement with the following statements. (Select one for each statement.)

	<b>Total (N=450)</b>
Top 2 box (Net)	77%
(5) Strongly agree	35%
(4) Somewhat agree	42%
(3) Neither agree or disagree	13%
Bottom 2 box (Net)	10%
(2) Somewhat disagree	9%
(1) Strongly disagree	1%

Q19[...].\_scale. [ Mobile apps are essential for business success in today's technology-centered world ] Please indicate your level of agreement with the following statements. (Select one for each statement.)

	<b>Total (N=450)</b>
Top 2 box (Net)	82%
(5) Strongly agree	42%
(4) Somewhat agree	41%
(3) Neither agree or disagree	14%
Bottom 2 box (Net)	4%
(2) Somewhat disagree	3%
(1) Strongly disagree	0%

Q19[...].\_scale. [ Paid app promotions give benefits that non-paid advertising cannot achieve ] Please indicate your level of agreement with the following statements. (Select one for each statement.)

	<b>Total (N=450)</b>
Top 2 box (Net)	78%
(5) Strongly agree	29%
(4) Somewhat agree	50%
(3) Neither agree or disagree	16%
Bottom 2 box (Net)	6%
(2) Somewhat disagree	5%
(1) Strongly disagree	1%

## SURVEY FINDINGS AND METHODOLOGY

Q19[...].\_scale. [ Investing in mobile apps is crucial to long-term business success ] Please indicate your level of agreement with the following statements. (Select one for each statement.)

	<b>Total (N=450)</b>
Top 2 box (Net)	85%
(5) Strongly agree	43%
(4) Somewhat agree	42%
(3) Neither agree or disagree	11%
Bottom 2 box (Net)	5%
(2) Somewhat disagree	4%
(1) Strongly disagree	1%

Q19[...].\_scale. [ Investing in mobile apps is key to driving profitability ] Please indicate your level of agreement with the following statements. (Select one for each statement.)

	<b>Total (N=450)</b>
Top 2 box (Net)	74%
(5) Strongly agree	31%
(4) Somewhat agree	43%
(3) Neither agree or disagree	18%
Bottom 2 box (Net)	8%
(2) Somewhat disagree	7%
(1) Strongly disagree	1%

Q19[...].\_scale. [ During times of economic uncertainty, customers who utilize the app are more likely to be repeat customers ] Please indicate your level of agreement with the following statements. (Select one for each statement.)

	<b>Total (N=450)</b>
Top 2 box (Net)	87%
(5) Strongly agree	39%
(4) Somewhat agree	47%
(3) Neither agree or disagree	10%
Bottom 2 box (Net)	3%
(2) Somewhat disagree	3%
(1) Strongly disagree	*

## SURVEY FINDINGS AND METHODOLOGY

Q19[...].\_scale. [ During times of economic uncertainty, customers who utilize the app tend to have shorter consideration phases ] Please indicate your level of agreement with the following statements. (Select one for each statement.)

	<b>Total (N=450)</b>
Top 2 box (Net)	77%
(5) Strongly agree	26%
(4) Somewhat agree	50%
(3) Neither agree or disagree	17%
Bottom 2 box (Net)	6%
(2) Somewhat disagree	5%
(1) Strongly disagree	1%

Q19[...].\_scale. [ Customers who use the app are less sensitive to price changes in our products ] Please indicate your level of agreement with the following statements. (Select one for each statement.)

	<b>Total (N=450)</b>
Top 2 box (Net)	62%
(5) Strongly agree	22%
(4) Somewhat agree	39%
(3) Neither agree or disagree	26%
Bottom 2 box (Net)	12%
(2) Somewhat disagree	12%
(1) Strongly disagree	1%

Q19[...].\_scale. [ Paid app promotion is more important to invest in than organic promotion ] Please indicate your level of agreement with the following statements. (Select one for each statement.)

	<b>Total (N=450)</b>
Top 2 box (Net)	62%
(5) Strongly agree	26%
(4) Somewhat agree	36%
(3) Neither agree or disagree	25%
Bottom 2 box (Net)	12%
(2) Somewhat disagree	11%
(1) Strongly disagree	2%

## SURVEY FINDINGS AND METHODOLOGY

Q19[...].\_scale. [ Mobile apps used in-store improve the shopping experience ] Please indicate your level of agreement with the following statements. (Select one for each statement.)

	<b>Total (N=450)</b>
Top 2 box (Net)	75%
(5) Strongly agree	28%
(4) Somewhat agree	47%
(3) Neither agree or disagree	19%
Bottom 2 box (Net)	6%
(2) Somewhat disagree	5%
(1) Strongly disagree	1%

Q20[...].\_scale. [ Online (Website, Social media, search engine ads etc.) ] Please think of the different areas in your company's marketing budget. If your company needed to reduce the marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=380)</b>
Rank 1	23%
Rank 2	20%
Rank 3	14%
Rank 4	11%
Rank 5	12%

Q20[...].\_scale. [ Print (Newspapers, magazines, direct mail, etc.) ] Please think of the different areas in your company's marketing budget. If your company needed to reduce the marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=234)</b>
Rank 1	27%
Rank 2	19%
Rank 3	18%
Rank 4	11%
Rank 5	9%

## SURVEY FINDINGS AND METHODOLOGY

Q20[...].\_scale. [ Mobile (Mobile app(s), SMS, etc.) ] Please think of the different areas in your company's marketing budget. If your company needed to reduce the marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5.

Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=450)</b>
Rank 1	25%
Rank 2	20%
Rank 3	19%
Rank 4	14%
Rank 5	8%

Q20[...].\_scale. [ Influencer (social media influencers, etc.) ] Please think of the different areas in your company's marketing budget. If your company needed to reduce the marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=279)</b>
Rank 1	20%
Rank 2	23%
Rank 3	24%
Rank 4	14%
Rank 5	8%

Q20[...].\_scale. [ In-Store (Posters, displays, etc.) ] Please think of the different areas in your company's marketing budget. If your company needed to reduce the marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5.

Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=231)</b>
Rank 1	10%
Rank 2	19%
Rank 3	18%
Rank 4	17%
Rank 5	12%

## SURVEY FINDINGS AND METHODOLOGY

Q20[...].\_scale. [ Television or Radio ] Please think of the different areas in your company's marketing budget. If your company needed to reduce the marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=174)</b>
Rank 1	26%
Rank 2	18%
Rank 3	21%
Rank 4	13%
Rank 5	6%

Q20[...].\_scale. [ Outdoor (Billboards, transit, etc.) ] Please think of the different areas in your company's marketing budget. If your company needed to reduce the marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=235)</b>
Rank 1	25%
Rank 2	27%
Rank 3	17%
Rank 4	10%
Rank 5	10%

Q21[...].\_scale. [ Discount codes or special coupons ] Now, please think of the different areas in your company's mobile app marketing budget. If your company needed to reduce the mobile app marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=124)</b>
Rank 1	6%
Rank 2	23%
Rank 3	14%
Rank 4	13%
Rank 5	16%

## SURVEY FINDINGS AND METHODOLOGY

Q21[...].\_scale. [ Exclusive in-app deals or personalized offers ] Now, please think of the different areas in your company's mobile app marketing budget. If your company needed to reduce the mobile app marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=154)</b>
Rank 1	16%
Rank 2	20%
Rank 3	16%
Rank 4	8%
Rank 5	6%

Q21[...].\_scale. [ Early access to sales and new products ] Now, please think of the different areas in your company's mobile app marketing budget. If your company needed to reduce the mobile app marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=114)</b>
Rank 1	14%
Rank 2	14%
Rank 3	14%
Rank 4	8%
Rank 5	11%

Q21[...].\_scale. [ Loyalty or point-based rewards (exchanged from app downloads, etc.) ] Now, please think of the different areas in your company's mobile app marketing budget. If your company needed to reduce the mobile app marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=97)</b>
Rank 1	23%
Rank 2	19%
Rank 3	13%
Rank 4	6%
Rank 5	10%

## SURVEY FINDINGS AND METHODOLOGY

Q21[...].\_scale. [ Search engine ads ] Now, please think of the different areas in your company`s mobile app marketing budget. If your company needed to reduce the mobile app marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=190)</b>
Rank 1	14%
Rank 2	21%
Rank 3	20%
Rank 4	13%
Rank 5	6%

Q21[...].\_scale. [ Display ads ] Now, please think of the different areas in your company`s mobile app marketing budget. If your company needed to reduce the mobile app marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=135)</b>
Rank 1	28%
Rank 2	19%
Rank 3	14%
Rank 4	9%
Rank 5	4%

Q21[...].\_scale. [ Social media ads ] Now, please think of the different areas in your company`s mobile app marketing budget. If your company needed to reduce the mobile app marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=219)</b>
Rank 1	27%
Rank 2	19%
Rank 3	16%
Rank 4	11%
Rank 5	7%



## SURVEY FINDINGS AND METHODOLOGY

Q21[...].\_scale. [ App store ads (Google or Apple store promotion, etc.) ] Now, please think of the different areas in your company's mobile app marketing budget. If your company needed to reduce the mobile app marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=188)</b>
Rank 1	22%
Rank 2	13%
Rank 3	20%
Rank 4	13%
Rank 5	7%

Q21[...].\_scale. [ Referral program ] Now, please think of the different areas in your company's mobile app marketing budget. If your company needed to reduce the mobile app marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=90)</b>
Rank 1	13%
Rank 2	20%
Rank 3	11%
Rank 4	9%
Rank 5	8%

Q21[...].\_scale. [ Company website, blog, and/or online communities ] Now, please think of the different areas in your company's mobile app marketing budget. If your company needed to reduce the mobile app marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=246)</b>
Rank 1	17%
Rank 2	17%
Rank 3	19%
Rank 4	13%
Rank 5	10%

## SURVEY FINDINGS AND METHODOLOGY

Q21[...].\_scale. [ Email marketing ] Now, please think of the different areas in your company's mobile app marketing budget. If your company needed to reduce the mobile app marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=256)</b>
Rank 1	16%
Rank 2	16%
Rank 3	16%
Rank 4	12%
Rank 5	7%

Q21[...].\_scale. [ In-store advertising (signs, displays, etc.) ] Now, please think of the different areas in your company's mobile app marketing budget. If your company needed to reduce the mobile app marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=145)</b>
Rank 1	27%
Rank 2	17%
Rank 3	13%
Rank 4	10%
Rank 5	8%

Q21[...].\_scale. [ Search Engine Optimization (SEO) ] Now, please think of the different areas in your company's mobile app marketing budget. If your company needed to reduce the mobile app marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=223)</b>
Rank 1	16%
Rank 2	19%
Rank 3	13%
Rank 4	8%
Rank 5	15%

## SURVEY FINDINGS AND METHODOLOGY

Q21[...].\_scale. [ App Store Optimization (ASO) ] Now, please think of the different areas in your company's mobile app marketing budget. If your company needed to reduce the mobile app marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=172)</b>
Rank 1	15%
Rank 2	15%
Rank 3	15%
Rank 4	15%
Rank 5	5%

Q21[...].\_scale. [ Creating immersive experiences for app users ] Now, please think of the different areas in your company's mobile app marketing budget. If your company needed to reduce the mobile app marketing budget, rank the areas of the budget that would be reduced first; "Rank 1" being the first area to get reduced, and so forth. Rank up to 5. Reminder: "Rank 1" is the first area to get reduced, and so forth.

	<b>Total (N=89)</b>
Rank 1	21%
Rank 2	21%
Rank 3	14%
Rank 4	9%
Rank 5	15%



## SURVEY FINDINGS AND METHODOLOGY

### About the Study

These are some of the findings of an Ipsos poll conducted on behalf of Google to determine ROI and long-term business value of mobile apps versus other channels, and attitudes about / usage of app marketing among medium-to-large retailers in the US (N=150), UK (N=150) and Germany (n=150). Ipsos fielded one 15-minute online survey among app decision makers in the director role or above, both in marketing and IT, at brick and mortar and e-commerce retailers in English and in German. The surveys were conducted Feb. 14 to March 6, 2023 (US and UK), and Feb. 22 to March 10, 2023 (Germany) with a total sample size of N=450.

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### About Ipsos

Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing over 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

Our tagline "Game Changers" sums up our ambition to help our 5,000 customers move confidently through a rapidly changing world.

Founded in France in 1975, Ipsos has been listed on the Euronext Paris since July 1, 1999. The company is part of the SBF 120 and Mid-60 indices and is eligible for the Deferred Settlement Service (SRD). ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP

**GAME CHANGERS**

