

MOBILE SEARCH MOMENTS

UNDERSTANDING HOW MOBILE
DRIVES CONVERSIONS

March 2013

Google™ nielsen



AGENDA



Understanding mobile search



Mobile search drives multi-channel conversions



Mobile search drives behavior in the moment



Perceptions of mobile search ads



SUMMARY OF FINDINGS

Mobile search is always on, happening on the go, at home and at work.

77% of mobile searches occur at home or at work;
17% on the go



Mobile searches are strongly tied to specific contexts.



Shopping queries are **2x more likely** to be in store

3 of 4 mobile searches trigger follow-up actions, whether it be further research, a store visit, a phone call, a purchase or word-of-mouth sharing.

On average, **each mobile search triggers nearly 2 follow-up actions**



Mobile search triggered follow-up actions also happen very quickly

55% of conversions (store visit, phone call or purchase) happen within an hour

QUESTIONS ADDRESSED

- 1** • Where, When, With Whom and How often does mobile search happen?
 - Why? Understanding motivations.
- 2** • What are the actions and conversions triggered by mobile?
- 3** • How do people perceive mobile advertising?



METHODOLOGY

STEP 1: MOBILE SEARCH DIARY

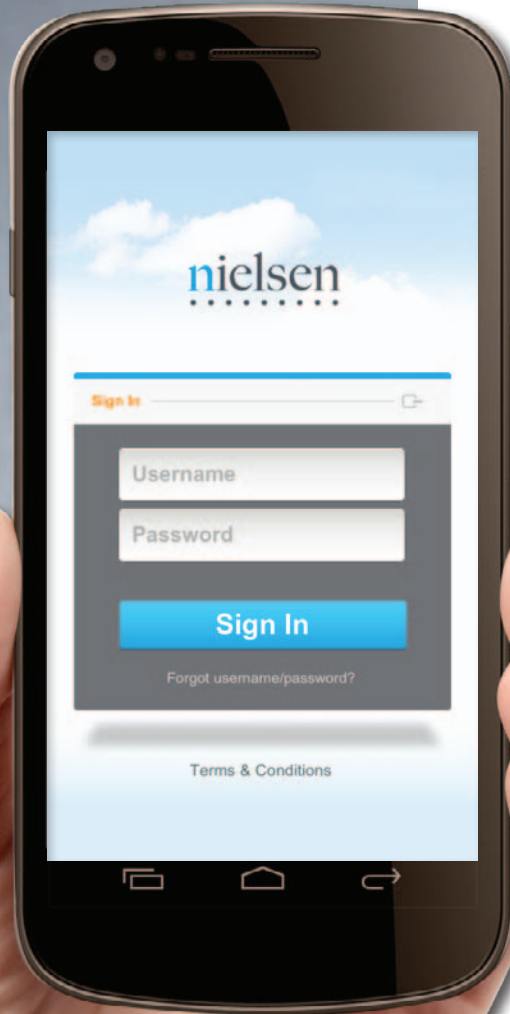
416 respondents were invited to log any type of mobile search in the moment, via Nielsen Life360 survey app on their mobile or tablet, for up to 14 days. 6,303 searches were logged in 2 weeks*.

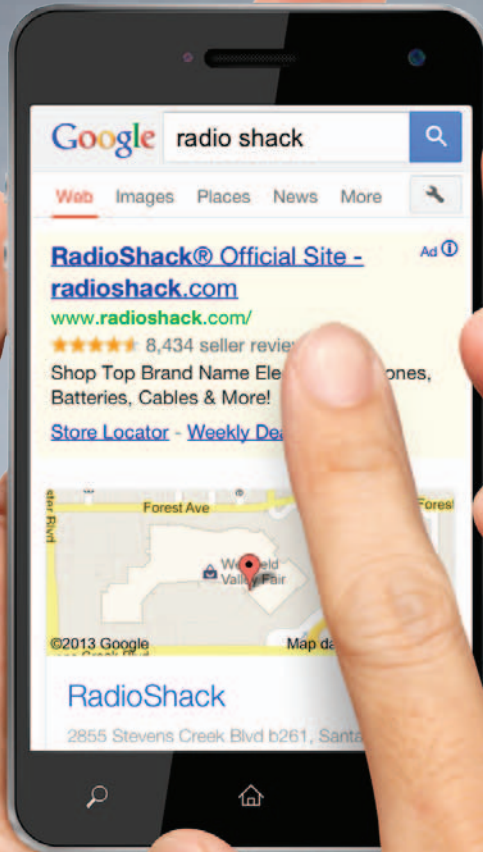
STEP 2: FOLLOW-UP SURVEY

Deeper probe into “outcomes” of searches via online questions, delivered 24+ hours after the initial query. 1,958 responses collected.

STEP 3: FINAL INTERVIEW

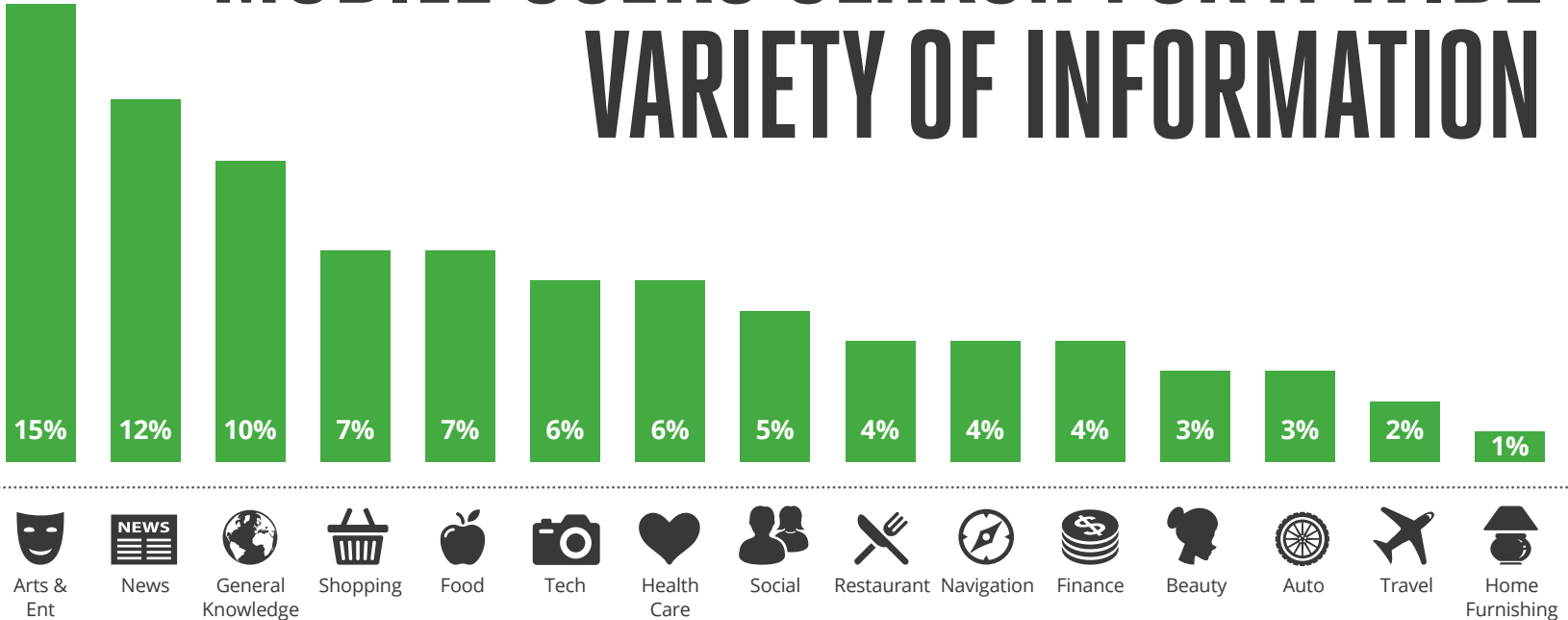
Exit survey at end of study answered by respondents. 323 responses collected.



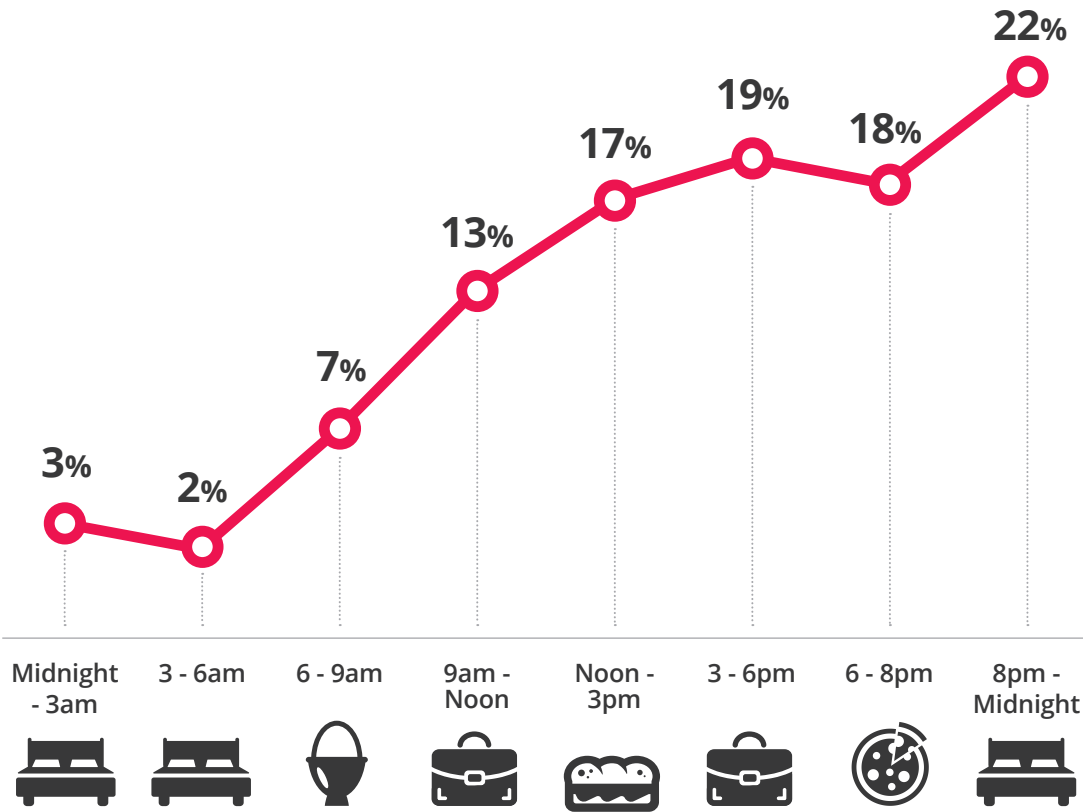


UNDERSTANDING MOBILE SEARCH


MOBILE USERS SEARCH FOR A WIDE VARIETY OF INFORMATION



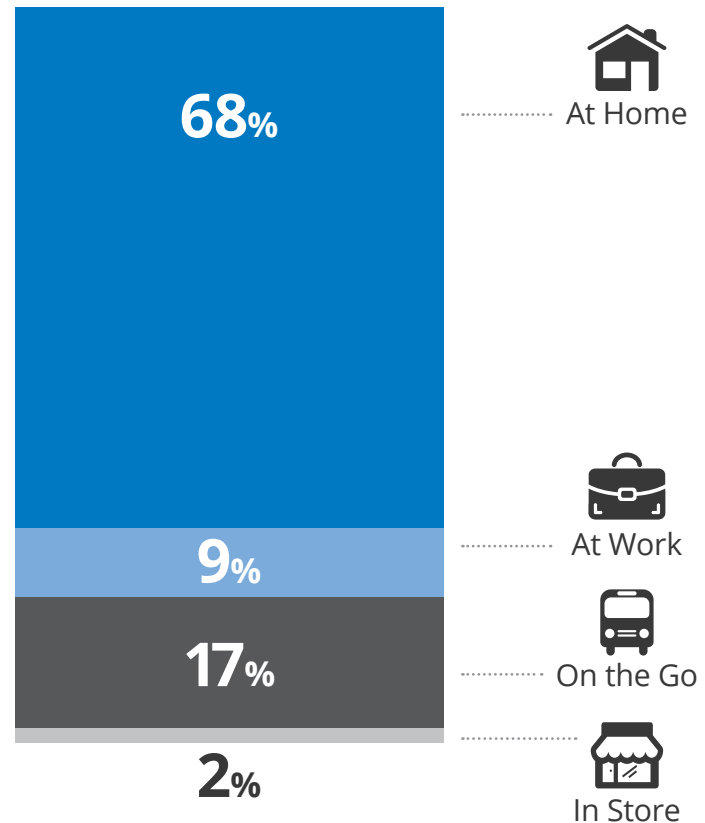
THE MAJORITY OF MOBILE SEARCHES OCCUR IN THE AFTERNOON AND EVENING



MOBILE SEARCH IS ALWAYS ON, WHETHER ON THE GO OR AT HOME AND WORK

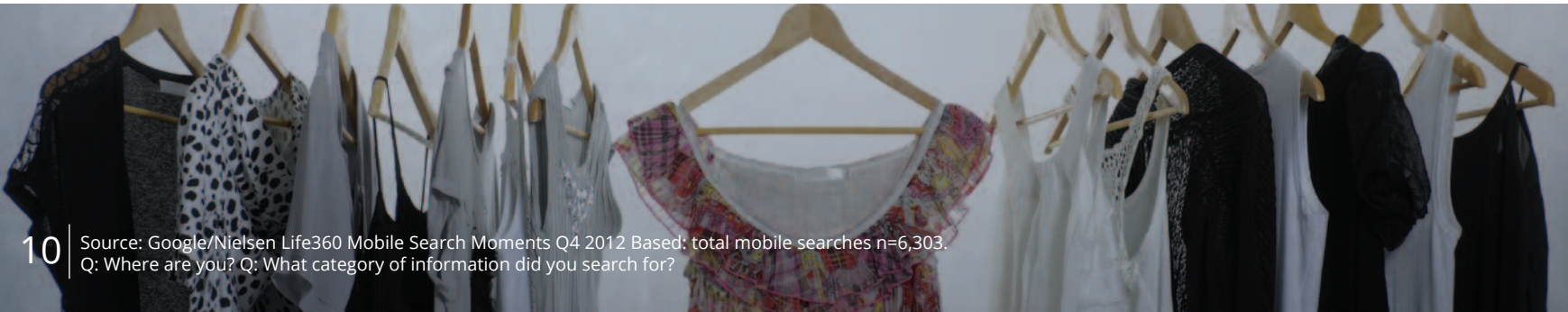
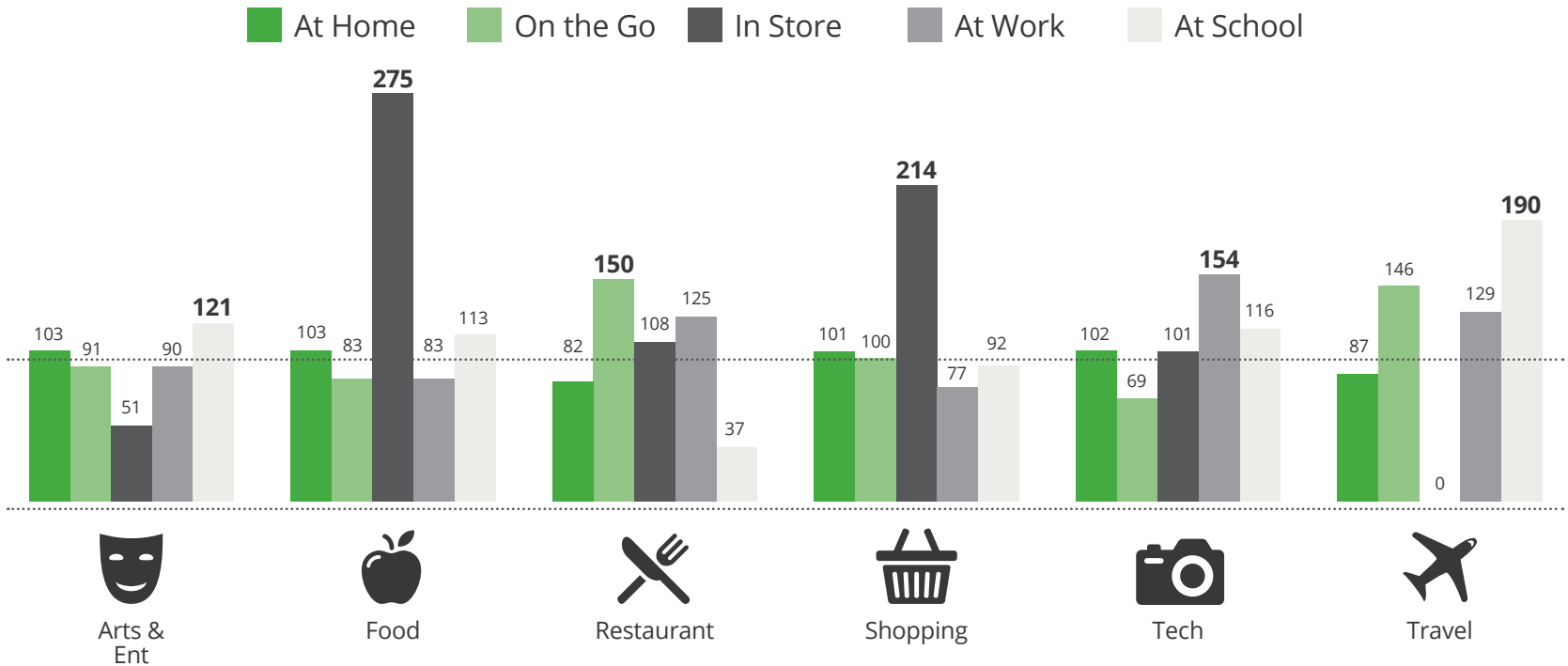
77% 

OF MOBILE SEARCHES ARE IN A
LOCATION (WORK OR HOME) LIKELY
TO HAVE A **PC AVAILABLE** TO THEM

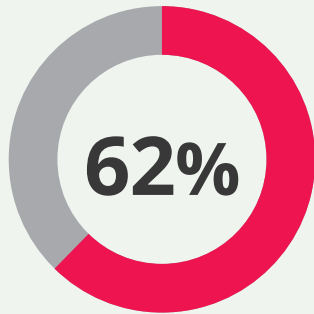


MOBILE SEARCH CONTEXTS VARY BY TYPE OF SEARCH

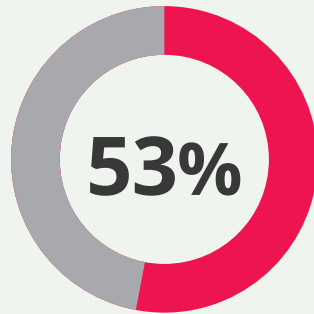
Index of Different Mobile Searches by Context



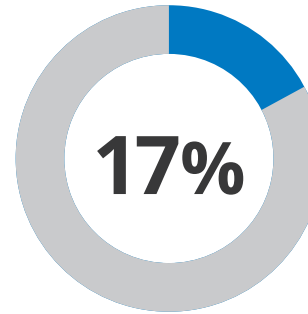
SPEED AND CONVENIENCE ARE THE MAIN DRIVERS OF MOBILE SEARCH



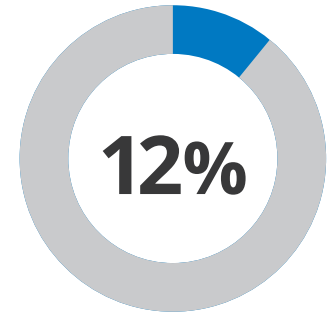
Most convenient way to search



Quickest way to search



Always use my mobile device for this type of search



No other option to find info

81% OF MOBILE SEARCHES ARE DRIVEN BY SPEED & CONVENIENCE

"Searching on a mobile device is quicker, easier and I can do it anywhere."

MOBILE SEARCHES AT HOME ESPECIALLY ARE DRIVEN BY SPEED & CONVENIENCE

81% OF MOBILE SEARCHES ARE DRIVEN BY SPEED & CONVENIENCE



"It was easier on the mobile device as I didn't have to get up [to] turn on the computer and wait for it to boot up."



MOBILE SEARCH DRIVES MULTI-CHANNEL CONVERSIONS



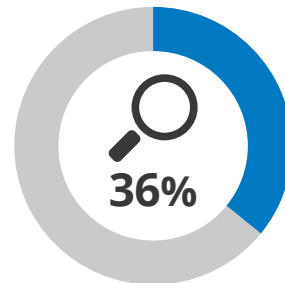
MOBILE SEARCH DRIVES VALUABLE OUTCOMES FOR BUSINESSES

73%

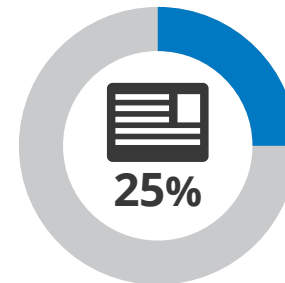
OF MOBILE SEARCHES TRIGGER **ADDITIONAL ACTION & CONVERSIONS**



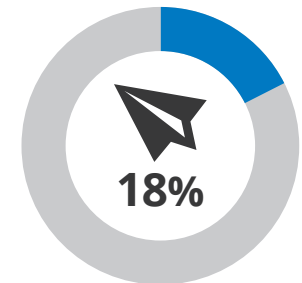
28% of mobile searches result in conversions (store visit, call, purchase)



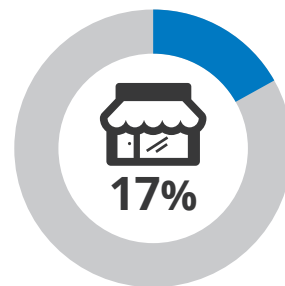
Continued Research



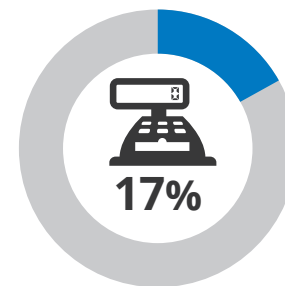
Visited a Retailer's Website



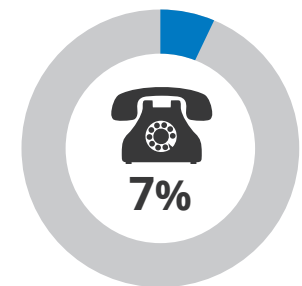
Shared Information



Visited a Store



Made a Purchase

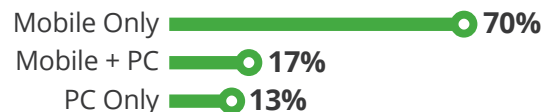


Called a Business

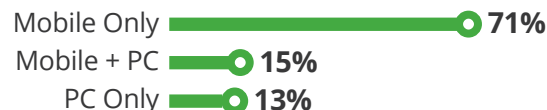
MOBILE SEARCH DRIVES ONLINE & OFFLINE ACTIONS



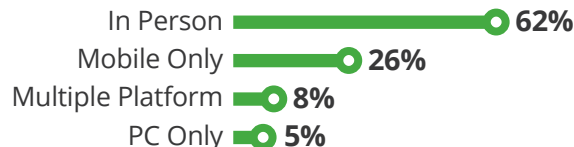
36% CONTINUE RESEARCH



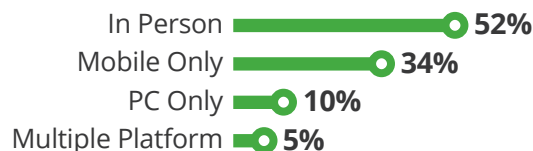
25% VISIT A RETAILER WEBSITE



18% SHARE INFO AND WORD-OF-MOUTH



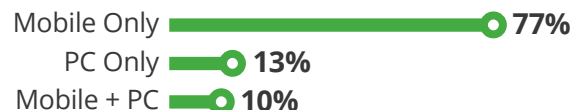
17% MAKE A PURCHASE



17% VISIT A STORE OR SERVICE LOCATION



7% CALL A BUSINESS



A MOBILE SEARCH LEADS TO ALMOST TWO ACTIONS ON AVERAGE

1.89 FOLLOW-UP ACTIONS
PER **MOBILE SEARCH**

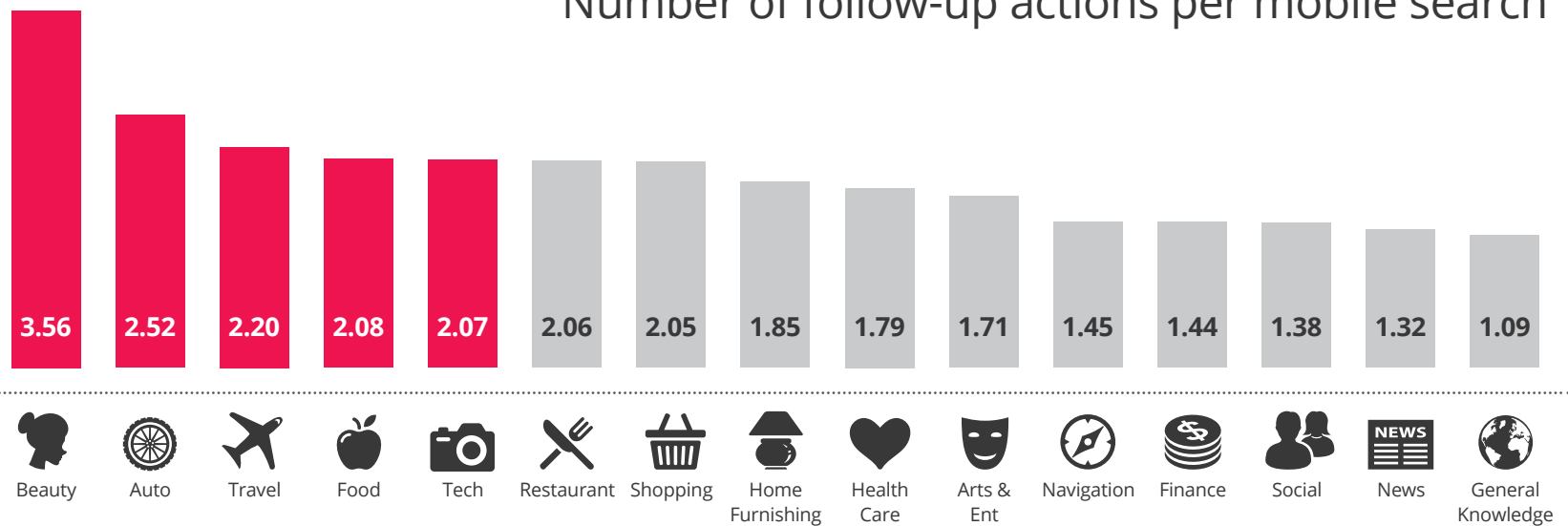
Even more when searches happen outside the home

1.98 **ON THE GO**
OR IN A STORE



PRODUCT AND SHOPPING SEARCHES HAVE A HIGHER NUMBER OF OUTCOMES

Number of follow-up actions per mobile search





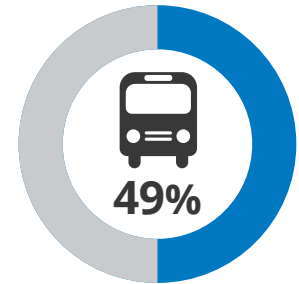
MOBILE SEARCH IS A KEY PART OF THE DECISION-MAKING PROCESS

45%

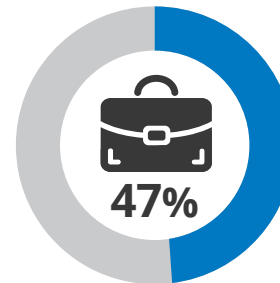
OF ALL MOBILE SEARCHES ARE **GOAL-ORIENTED** AND CONDUCTED TO HELP MAKE A DECISION



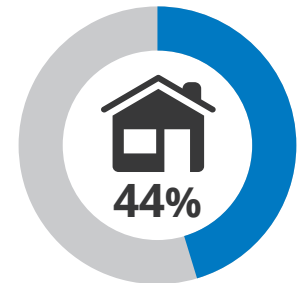
In a Store



On the Go



At Work



At Home

WHEN PEOPLE USE MOBILE SEARCH TO HELP MAKE A DECISION THEY ARE....



30% MORE LIKELY TO VISIT
A **RETAILER WEBSITE**



57% MORE LIKELY TO
VISIT A **STORE**



51% MORE LIKELY TO
MAKE A **PURCHASE**



39% MORE LIKELY TO
CALL A **BUSINESS**





**MOBILE SEARCH DRIVES
BEHAVIOR IN THE MOMENT**

MOBILE SEARCHES TRIGGER QUICK FOLLOW-UPS



63% of mobile search-triggered actions occur **within 1 hour** of the initial search

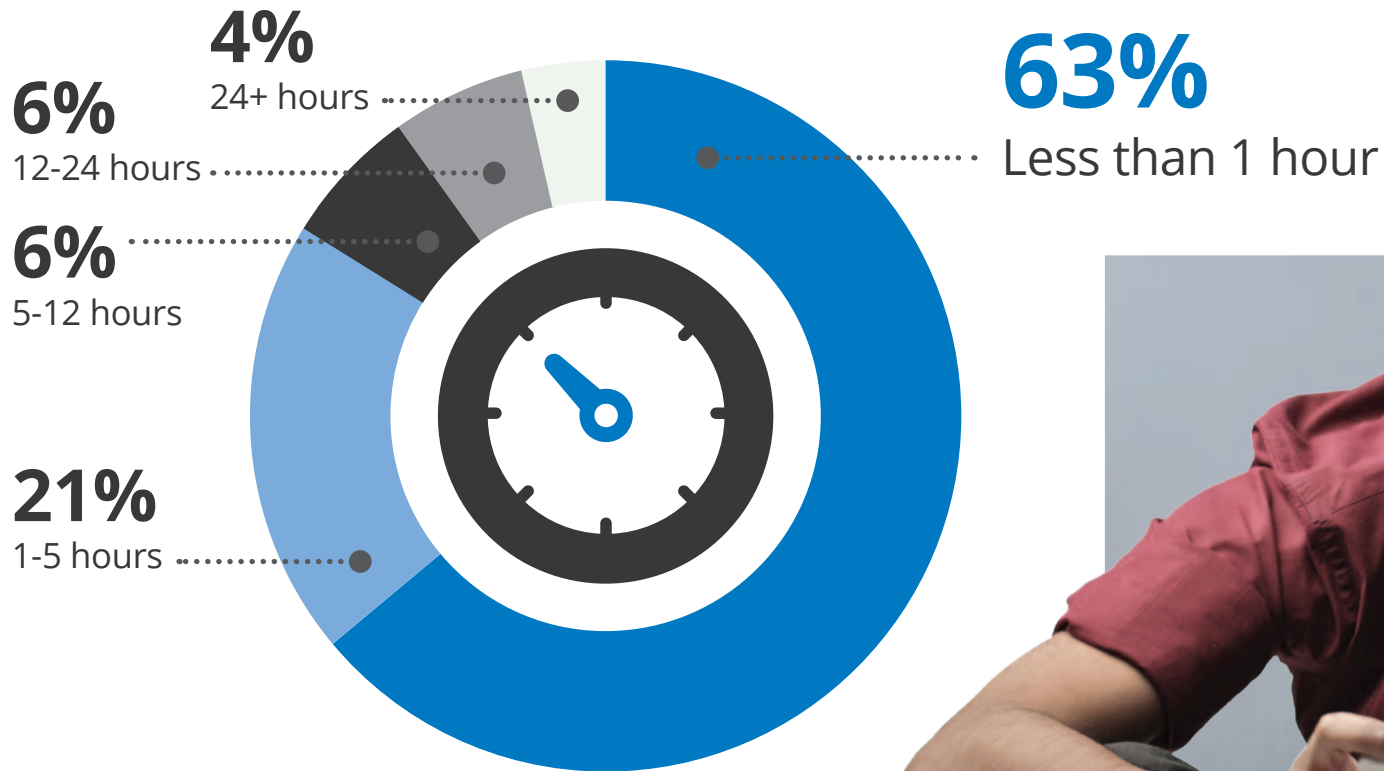
55%



**OF PURCHASE-RELATED CONVERSIONS OCCUR
WITHIN 1 HOUR OF INITIAL MOBILE SEARCH**

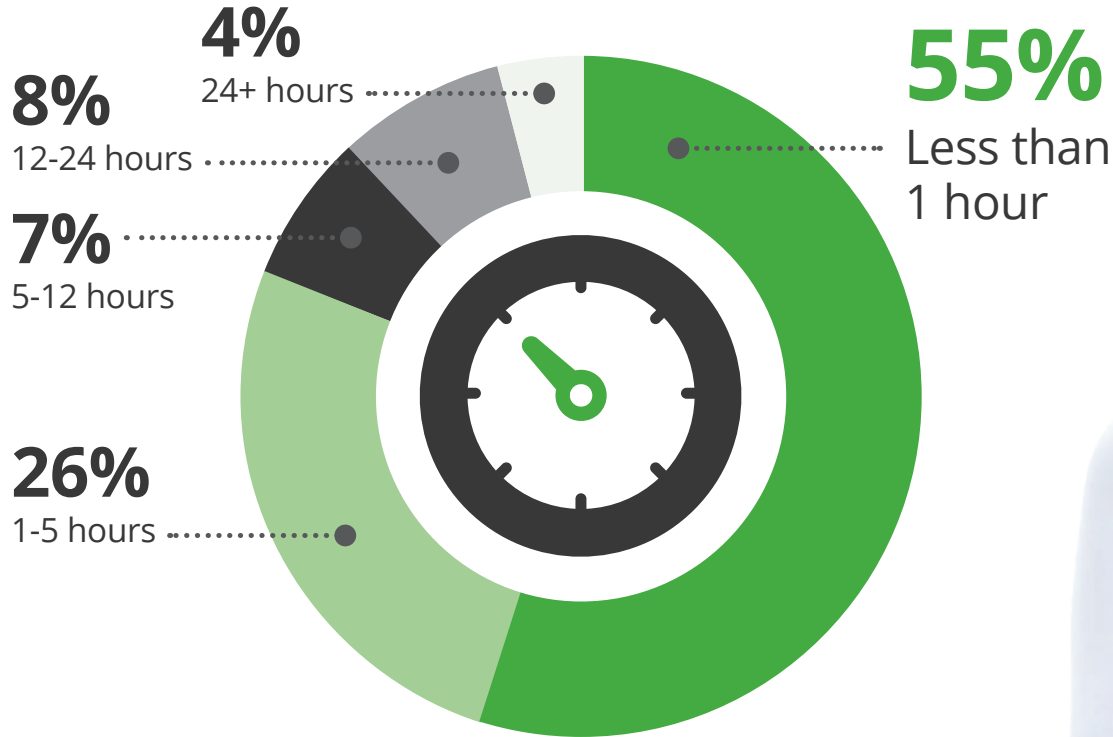


84% OF FOLLOW-UP ACTIONS TRIGGERED BY MOBILE SEARCH OCCUR WITHIN 5 HOURS



81% OF CONVERSIONS

(STORE VISIT, CALL OR PURCHASE) TRIGGERED BY MOBILE SEARCH OCCUR WITHIN 5 HOURS



MOBILE SEARCHES TRIGGER QUICK ONLINE AND OFFLINE ACTIONS



Call a business



Less than 1 hour

1-5 hours

5+ hours



Make a purchase



Visit a store



Share information



Visit retailer website



Continue research

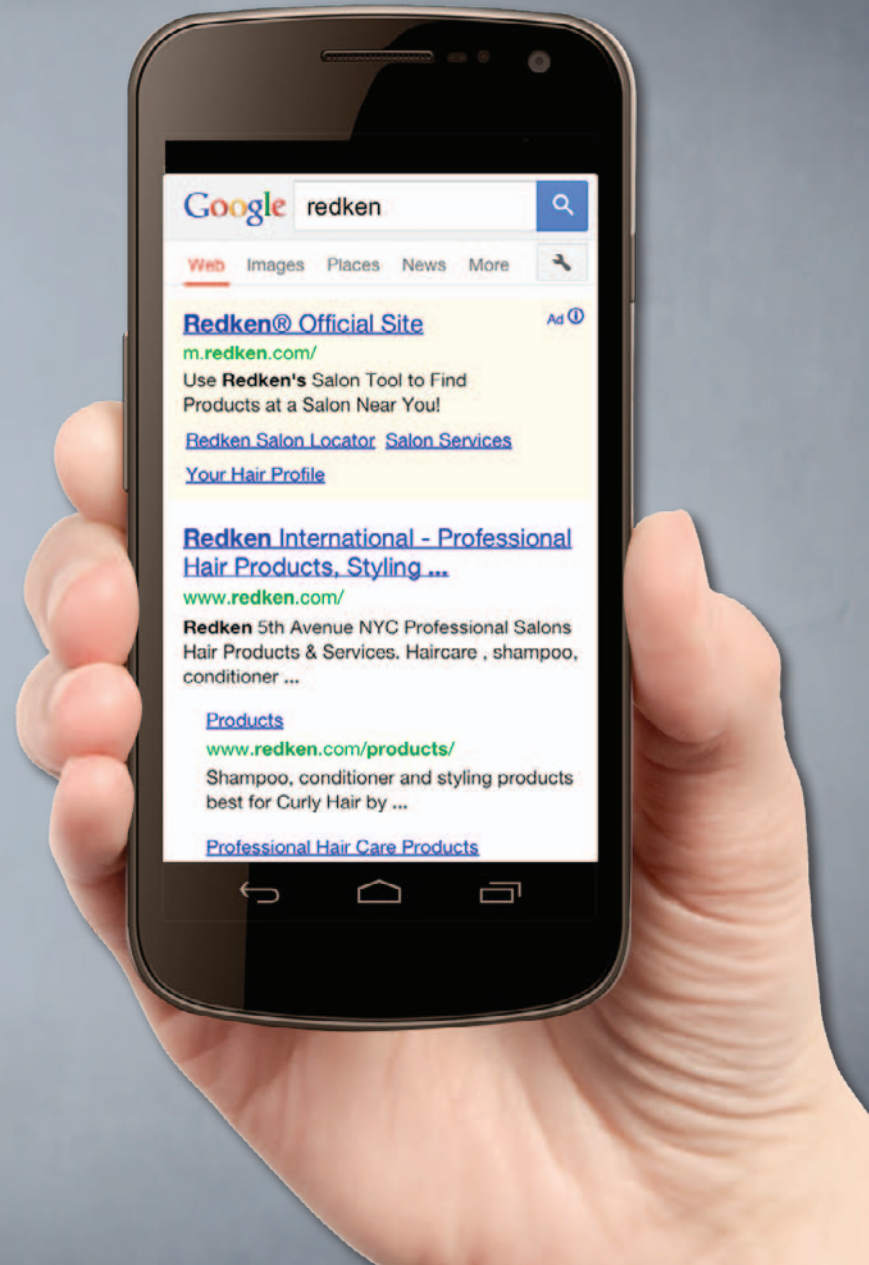


PERCEPTIONS OF MOBILE SEARCH ADS

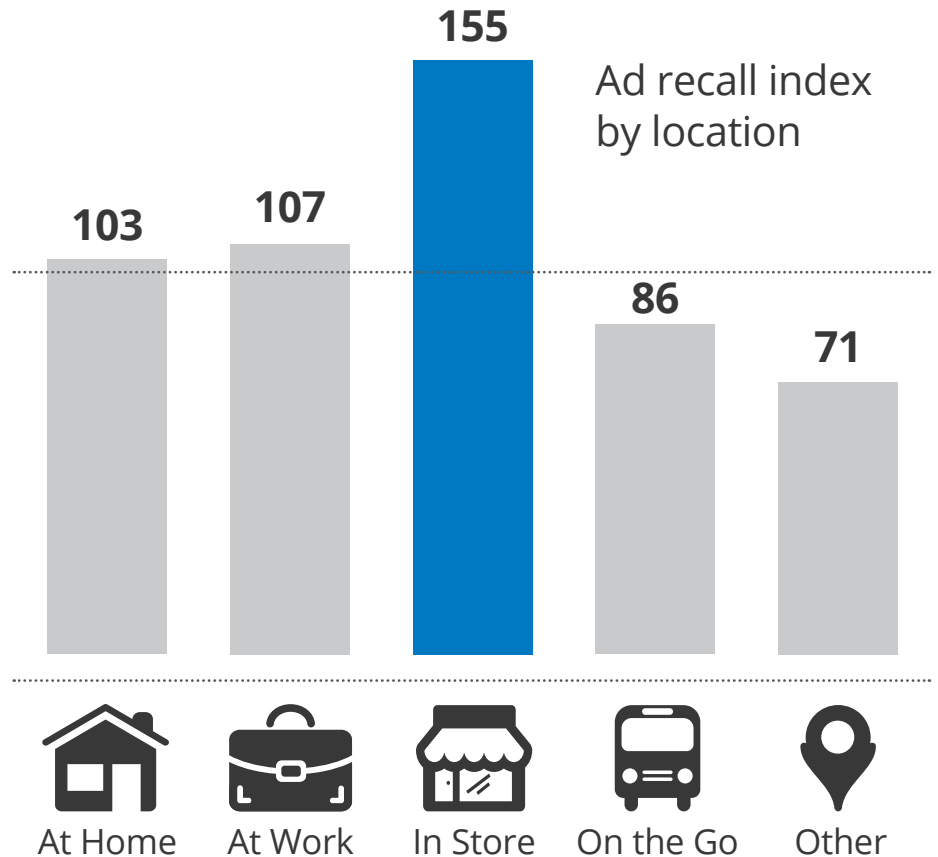


65%

OF RESPONDENTS
NOTICED  ADS
DURING THE STUDY

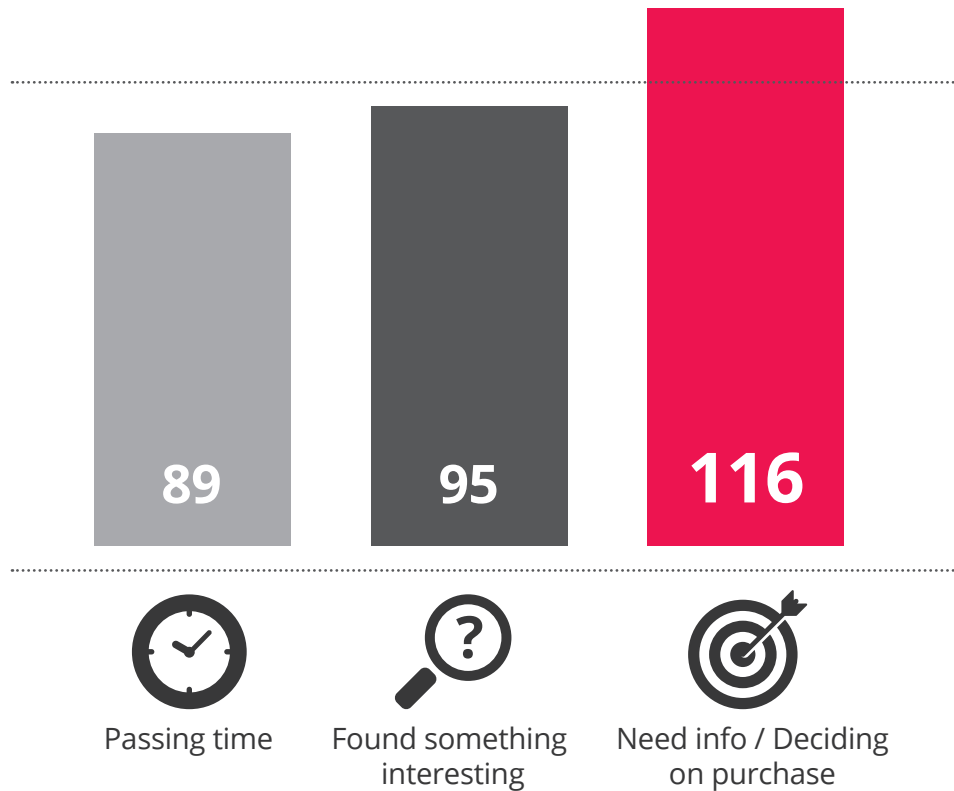


SEARCHERS ARE MUCH MORE LIKELY TO NOTICE ADS WHEN THEY ARE IN A PURCHASE ENVIRONMENT



MOBILE ADS ARE MOST EFFECTIVE DURING GOAL-ORIENTED SEARCHES

Ad recall index by motivation



59%

**OF PEOPLE FIND
MOBILE ADS USEFUL
THIS IS WHAT THEY SAID...**

*"No extra clicks needed.
Easy to spot."*



*"They don't take up much
of my small screen, and give
me just the info I can use."*

TOP 4 THINGS PEOPLE LIKE ABOUT MOBILE SEARCH ADS....

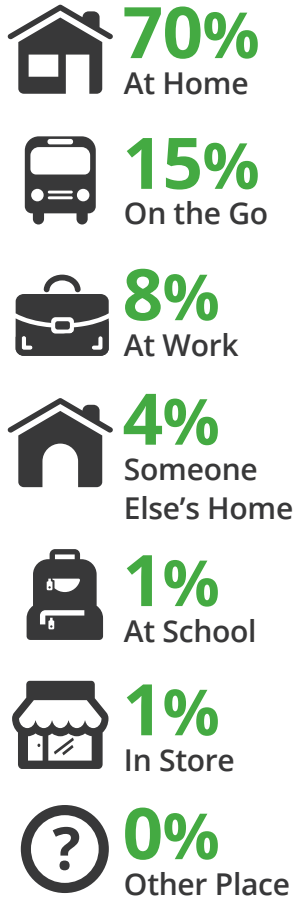
- It is not annoying or invasive
- It is short to the point
- Speed. It is quicker to load
- Ads provide relevant information

APPENDIX

OVERVIEW OF SEARCH EXPERIENCE BY CATEGORY

ARTS & ENTERTAINMENT

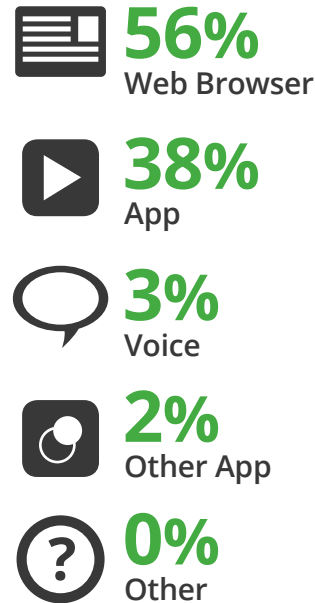
LOCATION



MOTIVATION



INITIATED ON...



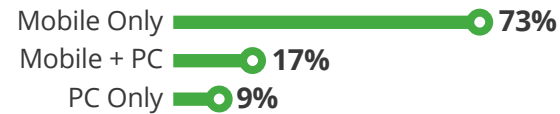
OUTCOME



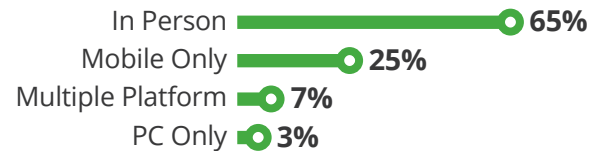
MOBILE DRIVES MULTI-CHANNEL BEHAVIOR – ARTS & ENT



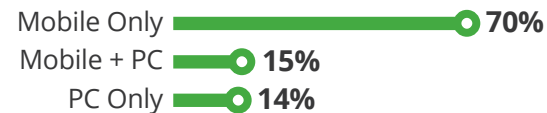
33% CONTINUE RESEARCH



21% SHARE INFO AND WORD-OF-MOUTH



11% VISIT A RETAILER WEBSITE



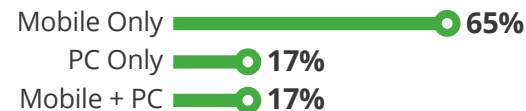
11% VISIT A STORE OR SERVICE LOCATION



9% MAKE A PURCHASE



4% CALL A BUSINESS

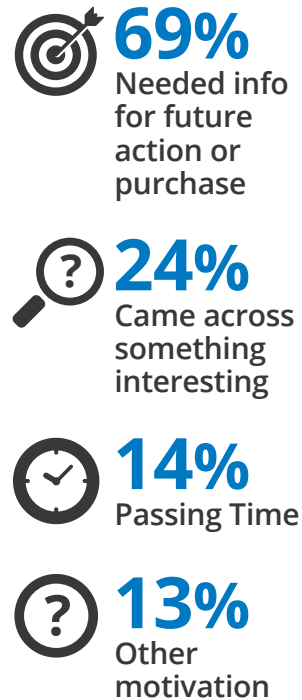


FOOD

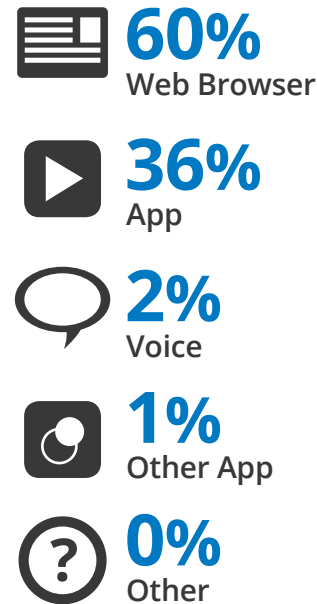
LOCATION



MOTIVATION



INITIATED ON...



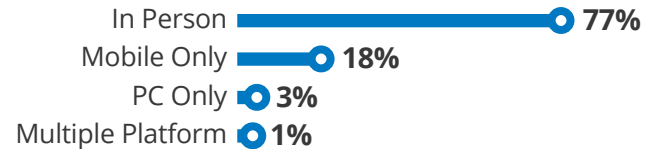
OUTCOME



MOBILE DRIVES MULTI-CHANNEL BEHAVIOR – FOOD



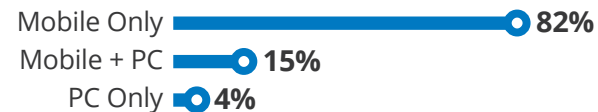
35% MAKE A PURCHASE



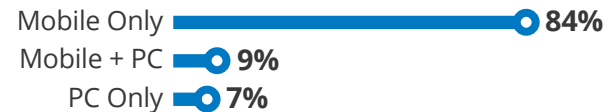
33% VISIT A STORE OR SERVICE LOCATION



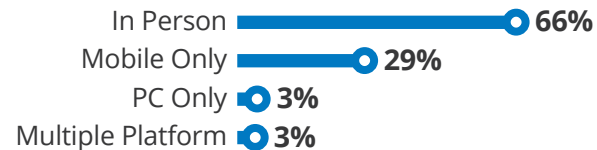
32% CONTINUE RESEARCH



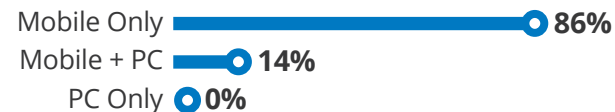
21% VISIT A RETAILER WEBSITE



14% SHARE INFO AND WORD-OF-MOUTH



5% CALL A BUSINESS



RESTAURANT

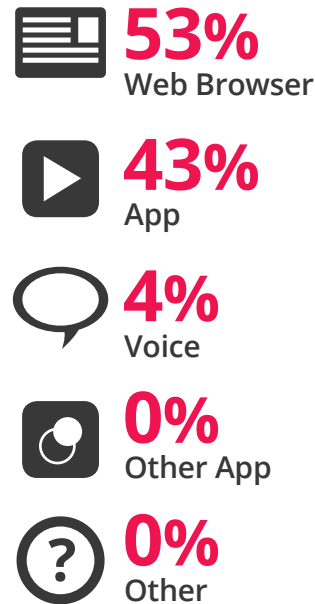
LOCATION



MOTIVATION



INITIATED ON...



OUTCOME



MOBILE DRIVES MULTI-CHANNEL BEHAVIOR – RESTAURANT



51% VISIT A STORE OR SERVICE LOCATION

In Person **100%**



30% MAKE A PURCHASE

In Person **62%**
 Mobile Only **33%**
 PC Only **5%**
 Multiple Platform **0%**



22% VISIT A RETAILER WEBSITE

Mobile Only **81%**
 PC Only **10%**
 Mobile + PC **10%**



19% CONTINUE RESEARCH

Mobile Only **73%**
 PC Only **23%**
 Mobile + PC **4%**



19% CALL A BUSINESS

Mobile Only **96%**
 PC Only **4%**
 Mobile + PC **0%**



19% SHARE INFO AND WORD-OF-MOUTH

In Person **88%**
 PC Only **8%**
 Mobile Only **4%**
 Multiple Platform **0%**

SHOPPING

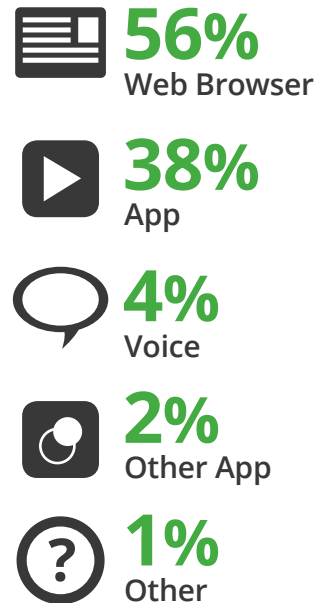
LOCATION



MOTIVATION



INITIATED ON...



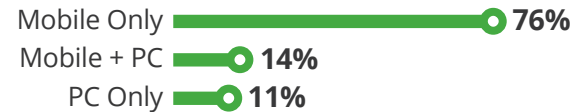
OUTCOME



MOBILE DRIVES MULTI-CHANNEL BEHAVIOR – SHOPPING



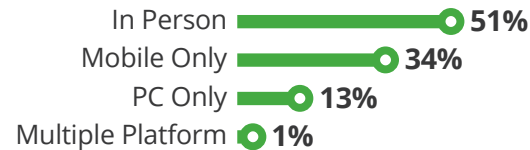
51% VISIT A RETAILER WEBSITE



35% CONTINUE RESEARCH



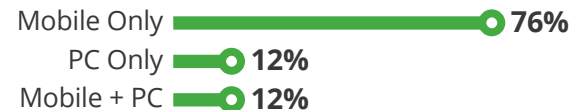
25% MAKE A PURCHASE



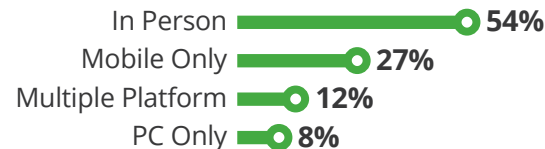
24% VISIT A STORE OR SERVICE LOCATION



12% CALL A BUSINESS



9% SHARE INFO AND WORD-OF-MOUTH

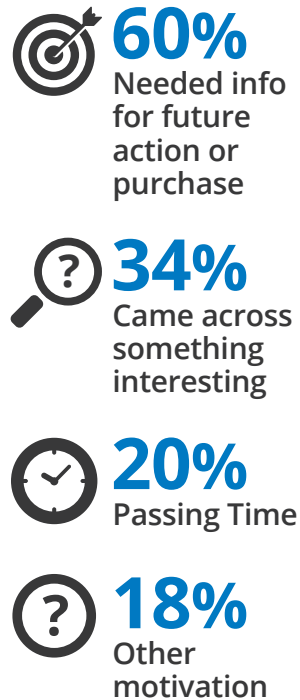


TECHNOLOGY

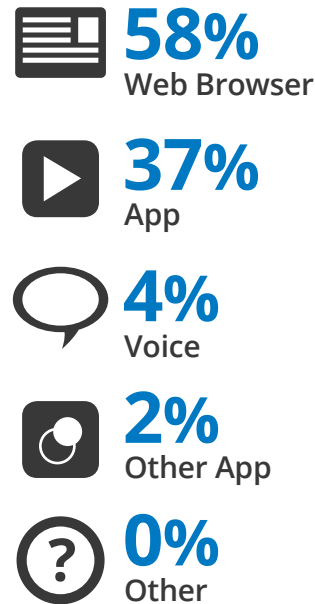
LOCATION



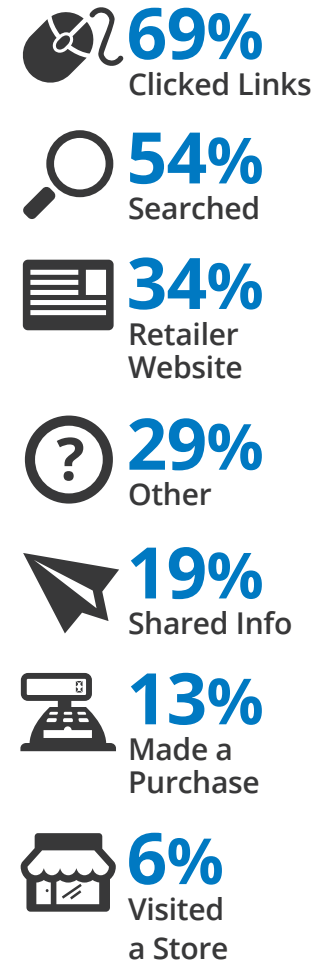
MOTIVATION



INITIATED ON...



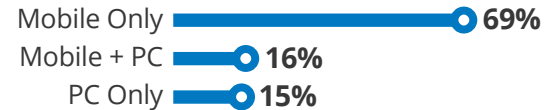
OUTCOME



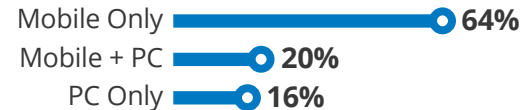
MOBILE DRIVES MULTI-CHANNEL BEHAVIOR – TECH



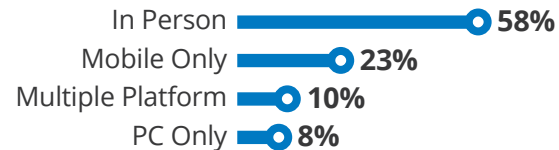
54% CONTINUE RESEARCH



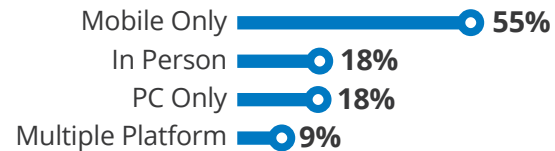
34% VISIT A RETAILER WEBSITE



19% SHARE INFO AND WORD-OF-MOUTH



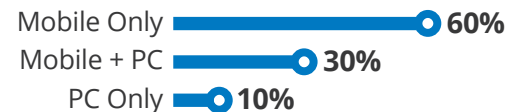
13% MAKE A PURCHASE



6% VISIT A STORE OR SERVICE LOCATION

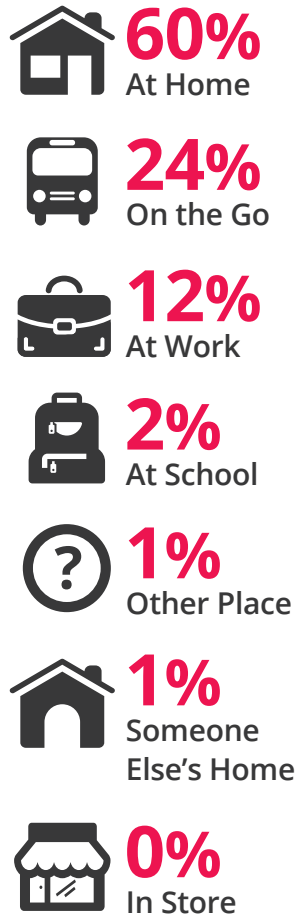


4% CALL A BUSINESS

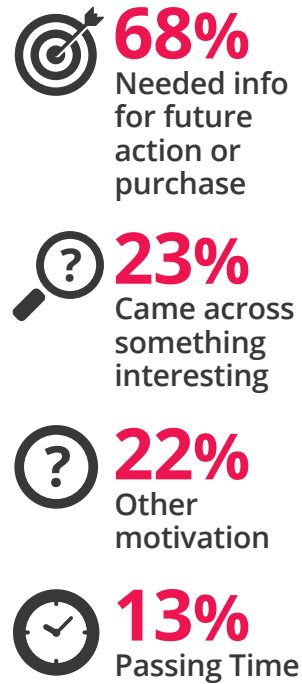


TRAVEL

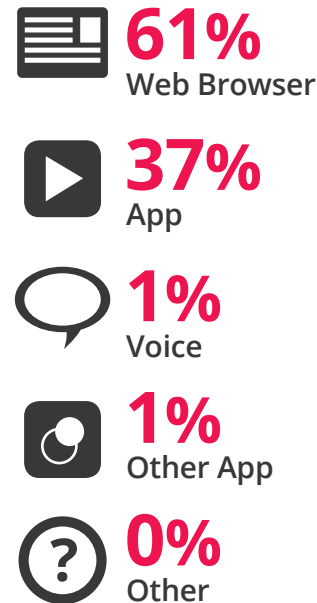
LOCATION



MOTIVATION



INITIATED ON...



OUTCOME



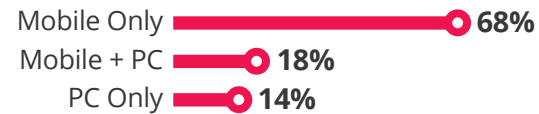
MOBILE DRIVES MULTI-CHANNEL BEHAVIOR – TRAVEL



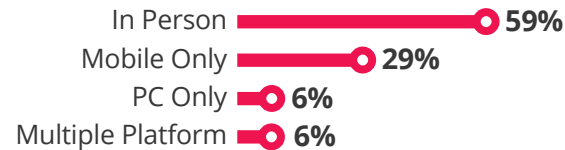
43% CONTINUE RESEARCH



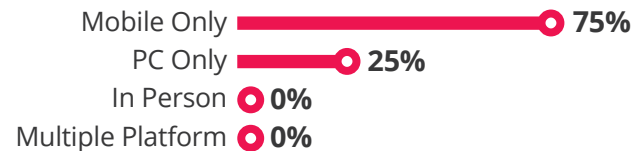
34% VISIT A RETAILER WEBSITE



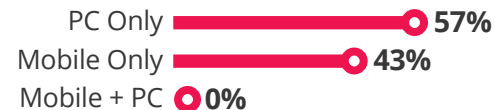
26% SHARE INFO AND WORD-OF-MOUTH



12% MAKE A PURCHASE



11% CALL A BUSINESS



8% VISIT A STORE OR SERVICE LOCATION





MOBILE SEARCH

CREATING MOMENTS THAT MATTER

