### **MOBILE SEARCH MOBILE SEARCH UNDERSTANDING HOW MOBILE DRIVES CONVERSIONS**

March 2013

Google<sup>™</sup> nielsen

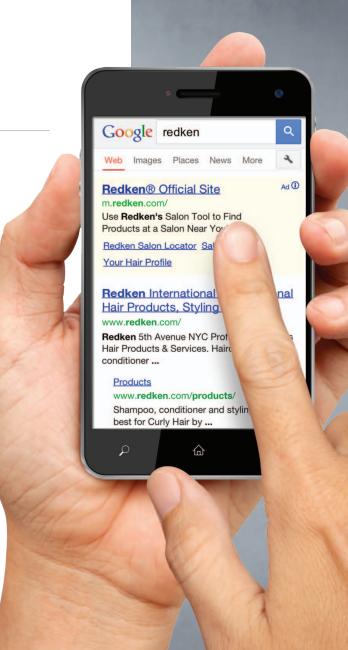
# AGENDA



Understanding mobile search

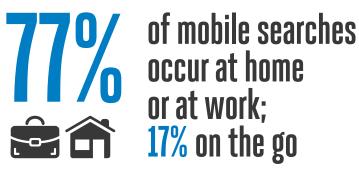
Mobile search drives multi-channel conversions

- Mobile search drivesbehavior 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.



Mobile searches are strongly tied to specific contexts.



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

 $\bigcirc$ 

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**

- Where, When, With Whom and How often does mobile search happen?
  - Why? Understanding motivations.
- What are the actions and conversions triggered by mobile?
- 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.

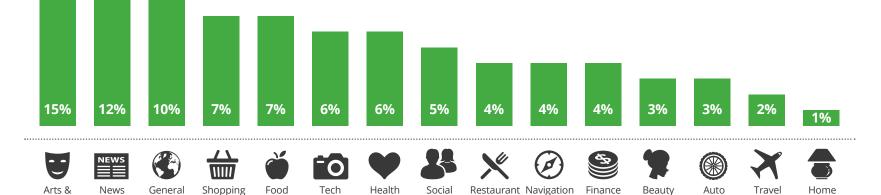
Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. \*Average number of searches logged per day by participants was 1.25. Sample of 70 tablet owners not included in results.

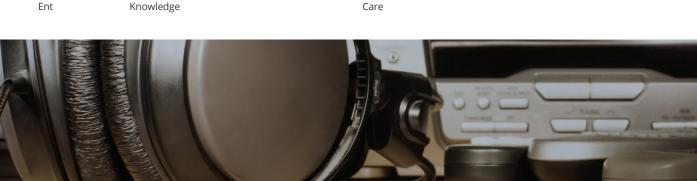


### UNDERSTANDING Mobile Search

### MOBILE USERS SEARCH FOR A WIDE Variety of information

Furnishing

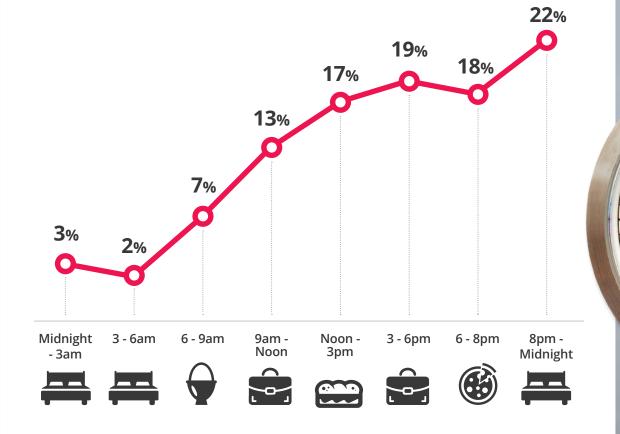




Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Based: Total mobile searches n=6,303. Q: What category of information did you search for? (select all that apply)

### THE MAJORITY OF MOBILE SEARCHES OCCUR IN THE AFTERNOON AND EVENING

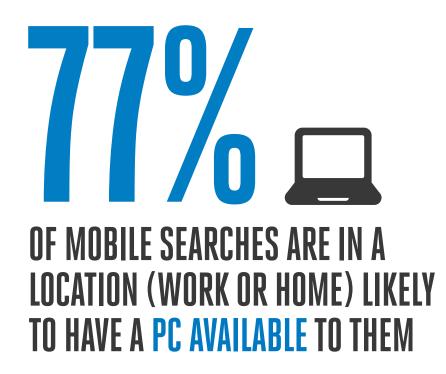
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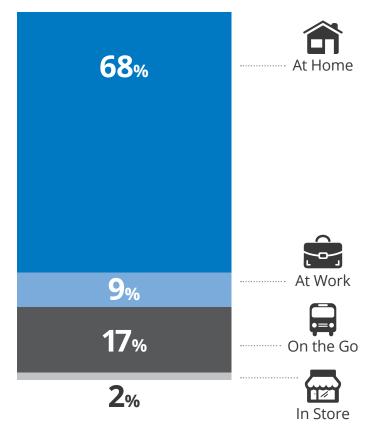


Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Total mobile searches n=6,303. Q: How long ago did you complete this search?

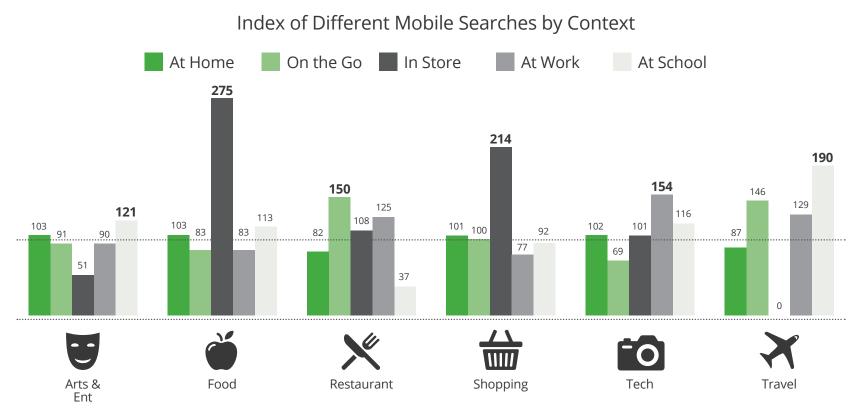
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### MOBILE SEARCH IS ALWAYS ON, Whether on the GO or at home and work



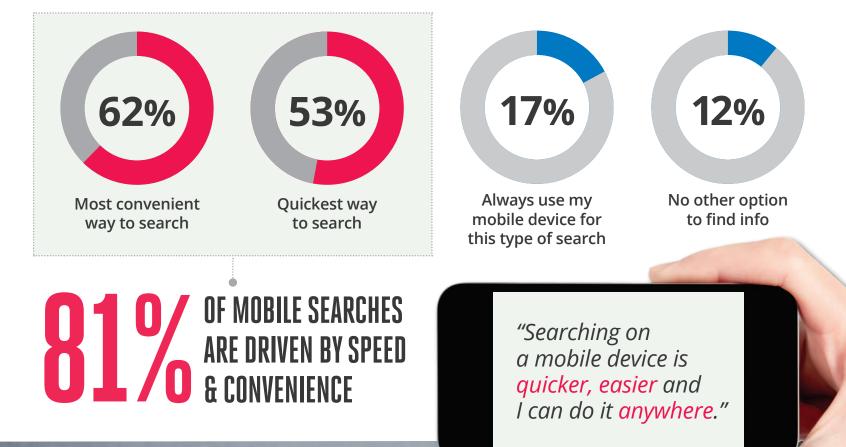


### **MOBILE SEARCH CONTEXTS VARY BY TYPE OF SEARCH**



10 Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012 Based: total mobile searches n=6,303. Q: Where are you? Q: What category of information did you search for?

### SPEED AND CONVENIENCE ARE THE MAIN DRIVERS OF MOBILE SEARCH



Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Total mobile searches n=6,303. Q: Why did you search on this mobile device? (select all that apply)

## MOBILE SEARCHES AT HOME ESPECIALLY ARE DRIVEN BY SPEED & CONVENIENCE

### OF MOBILE SEARCHES ARE DRIVEN BY SPEED & CONVENIENCE

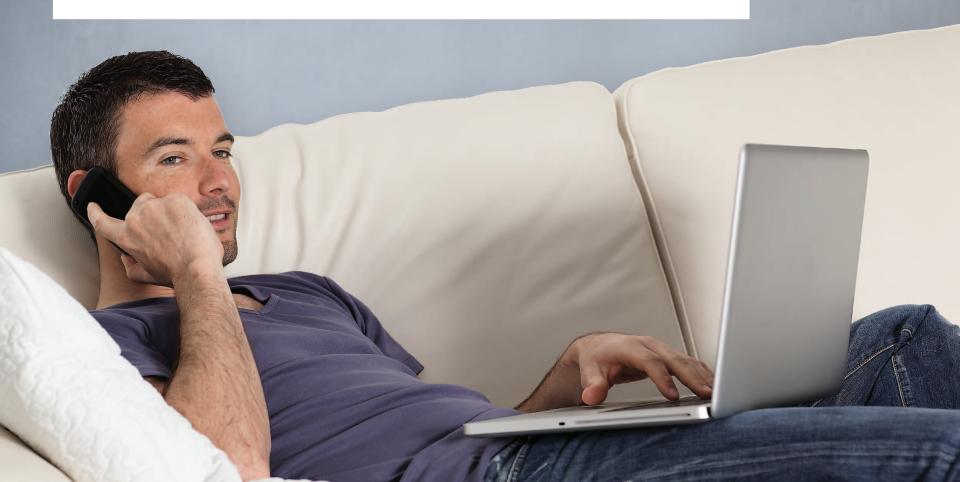


*"It was easier* on the mobile device as I didn't have to get up [to] turn on the computer and wait for it to boot up."

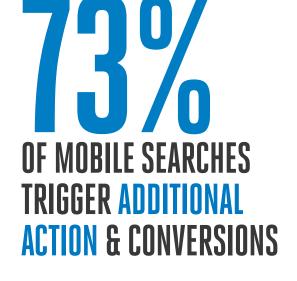


 $2 \left| \begin{array}{c} \text{Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Total searches n=6,303 (searches conducted on to go n = 1,048; searches conducted at work = 593; searches conducted at home n = 4,314) Q: Why did you search on this mobile device? (select all that apply) \\ \end{array} \right|$ 

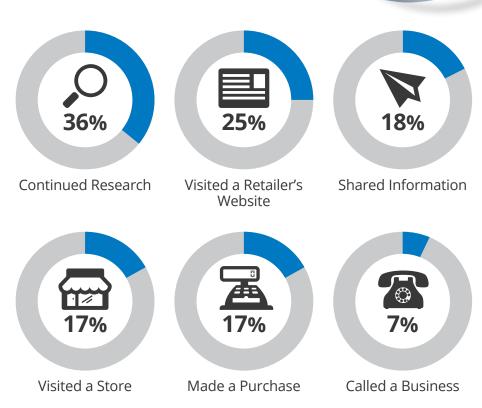
### MOBILE SEARCH DRIVES MULTI-CHANNEL CONVERSIONS



### MOBILE SEARCH DRIVES VALUABLE OUTCOMES FOR BUSINESSES

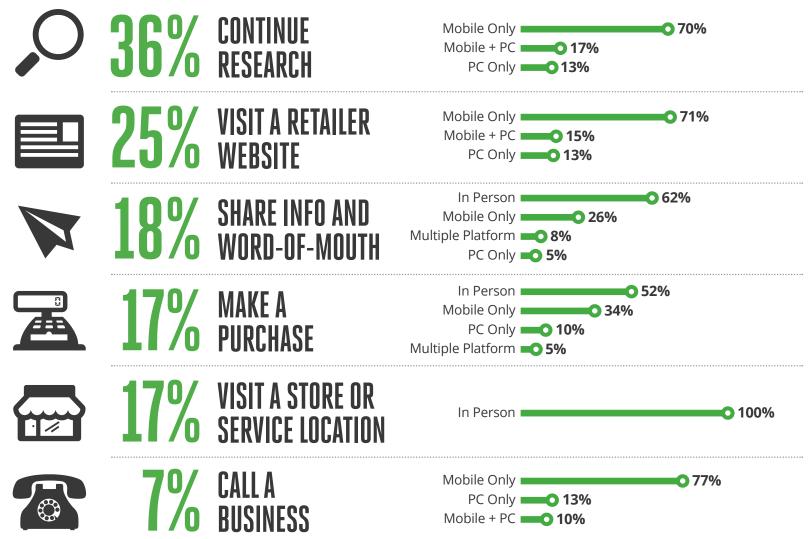






Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Outcome survey completes n=1,958 Q: Which of the following did you do on your smartphone? Q: Which of the following have you done on laptop/desktop/tablet? Q: What other actions did you take in person? (select all that apply)

### **MOBILE SEARCH DRIVES ONLINE & OFFLINE ACTIONS**



Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Outcome survey completes n=1,958 Q: What were the outcomes of this search? Q: Which of the following did you do on your smartphone? Q: Which of the following have you done on laptop/desktop/tablet?
Q: What other actions did you take in person?

### A MOBILE SEARCH LEADS TO ALMOST TWO ACTIONS ON AVERAGE



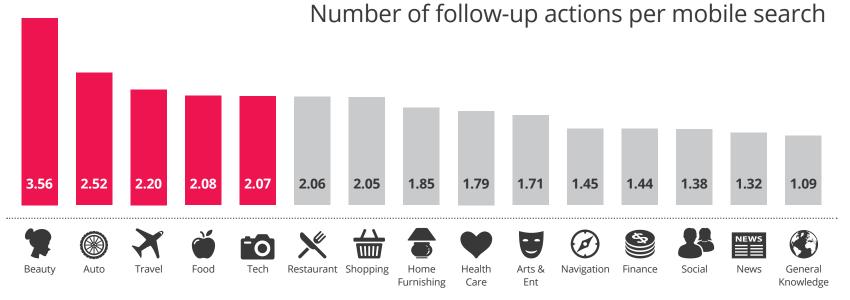
Even more when searches happen outside the home



16 Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Outcome survey completes n=1,958 Q: Which of the following did you do on your smartphone? Q: Which of the following have you done on laptop/desktop/tablet? Q: What other actions did you take in person?



### PRODUCT AND SHOPPING SEARCHES HAVE A HIGHER NUMBER OF OUTCOMES



17 Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Outcome survey completes n=1,958 Q: What category of information did you search for? Q: Which of the following did you do on your smartphone? Q: Which of the following have you done on laptop/desktop/tablet? Q: What other actions did you take in person? All Arts & Entertainment, Food, Restaurant, Shopping, Tech & Travel searches were eligible for a follow-up survey; other searches were only eligible if a respondent noticed advertising.

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

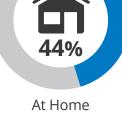




In a Store



**47%** At Work



8 Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Total mobile searches n=6,303 (Searches conducted on the go n = 1,048; searches conducted at work = 593; searches conducted at home n = 4,314; search conducted in a store n = 107) Q: Why did you conduct this search?

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

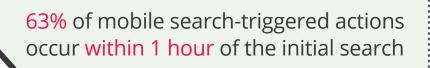


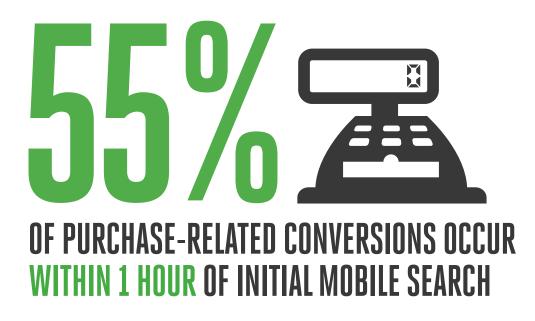


9 Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Searches triggered by "needed information to make a decision" motivation n=1,009. Q: Why did you conduct this search?

## MOBILE SEARCH DRIVES BEHAVIOR IN THE MOMENT

### **MOBILE SEARCHES TRIGGER QUICK FOLLOW-UPS**

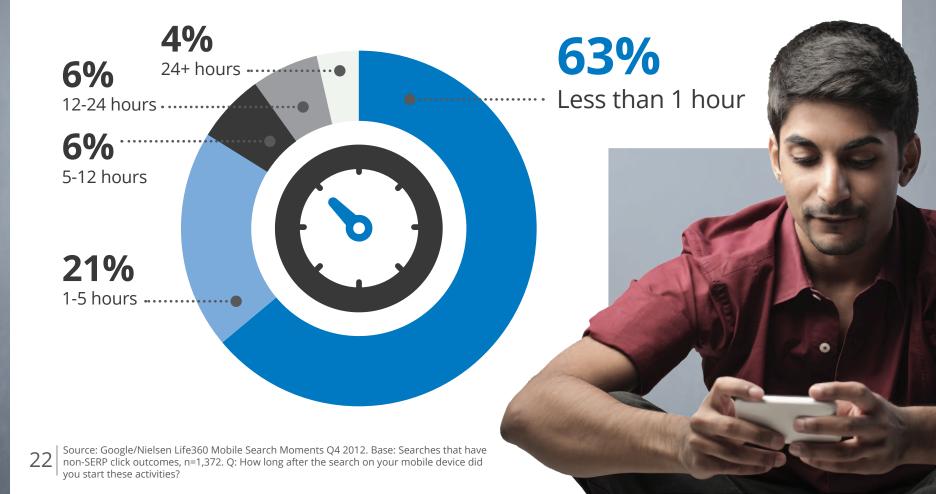




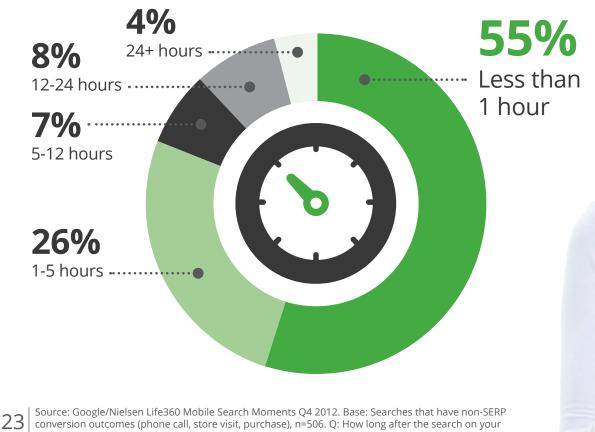
21 Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Searches that have non-SERP click outcomes n=1,372 Q: How long after the search on your mobile device did you start these activities?



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

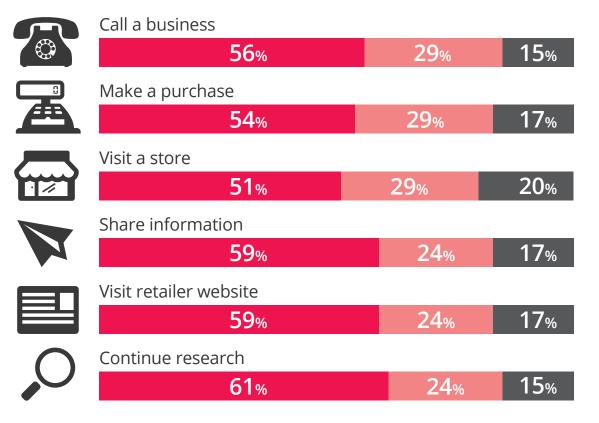


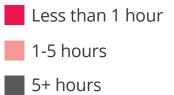
### **81% OF CONVERSIONS** (Store visit, call or purchase) triggered by mobile Search occur within 5 hours



mobile device did you start these activities?

### MOBILE SEARCHES TRIGGER QUICK ONLINE AND OFFLINE ACTIONS





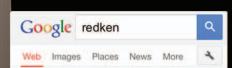


24 Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Searches that have non-SERP click outcomes, n=1,372 Q: How long after the search on your mobile device did you start these activities?

### PERCEPTIONS OF Mobile Search Ads

### **OF RESPONDENTS** NOTICED O ADS **DURING THE STUDY**

26 Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: People who participated in the study by using a smartphone, n= 416. Q: Did you notice ads during your search?



Ad ①

#### Redken® Official Site m.redken.com/

Use **Redken's** Salon Tool to Find Products at a Salon Near You!

Redken Salon Locator Salon Services Your Hair Profile

Redken International - Professional Hair Products, Styling ...

#### www.redken.com/

Redken 5th Avenue NYC Professional Salons Hair Products & Services. Haircare , shampoo, conditioner ...

#### Products

www.redken.com/products/

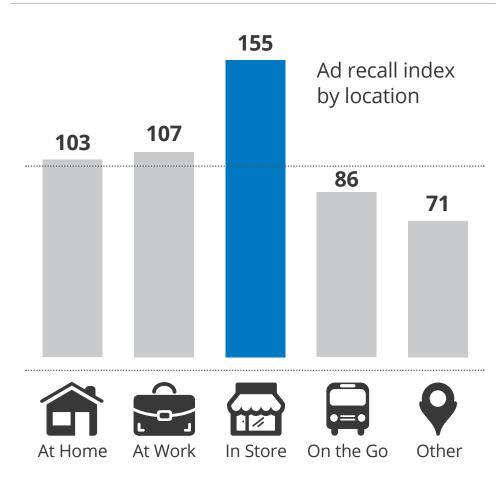
Shampoo, conditioner and styling products best for Curly Hair by ...

IJ

Professional Hair Care Products

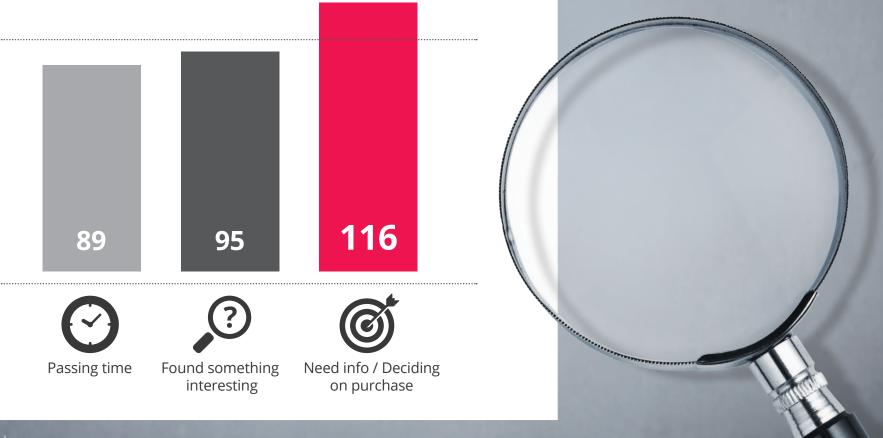
### **SEARCHERS ARE MUCH MORE LIKELY** To notice add when they are in a purchase environment





### **MOBILE ADS ARE MOST EFFECTIVE** During goal-oriented searches

Ad recall index by motivation



Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Total mobile searches n=6,303. Q: Where are you?; Q: Why did you conduct this search?; Q:Did you notice any ads during your search?

### **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**







Someone Else's Home

> **0%** Other Place





#### MOTIVATION

**240%** Came across something interesting

28% Needed info for future action or purchase

28% Other motivation

**27%** Passing Time INITIATED ON...

56% Web Browser

**38%** 

O 3% Voice

> O 2% Other App

**0%** Other OUTCOME

Clicked Links

? 35% Other

> **33%** Searched

Shared Info

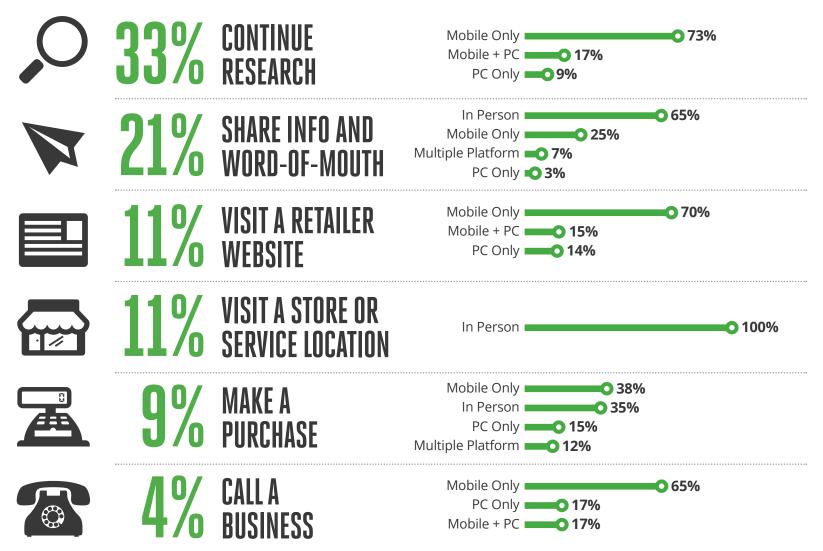




Retailer Website



### MOBILE DRIVES MULTI-CHANNEL BEHAVIOR – ARTS & ENT



Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Arts and Entertainment searches n=620 Q: What were the outcomes of this search? Q: Which of the following did you do on your smartphone? Q: Which of the following have you done on laptop/desktop/tablet? Q: What other actions did you take in person?

### FOOD

LOCATION

**71%** At Home







Someone Else's Home



**0%** Other Place

#### MOTIVATION

Ø

**69%** Needed info for future action or purchase

**24%** Came across something interesting

**14%** Passing Time

2 13% Other motivation INITIATED ON...



**36%** 



Other App

(?) 0% Other OUTCOME





Visited a Store

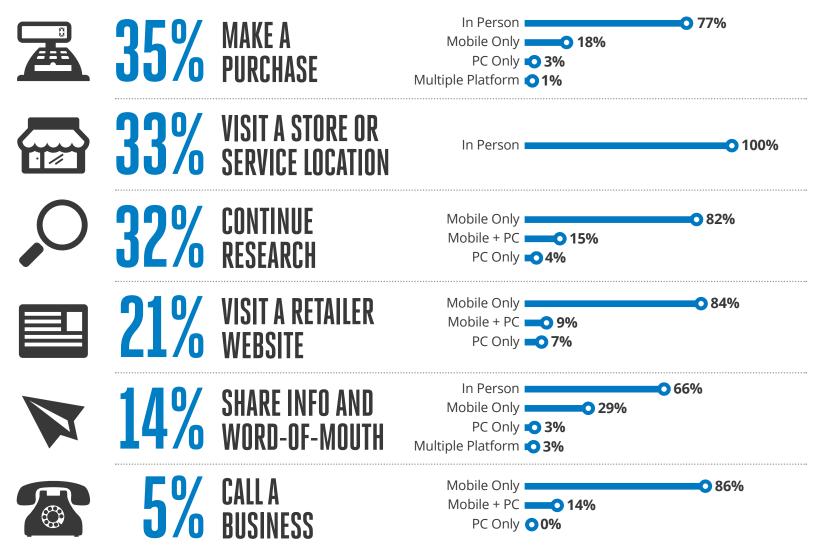
O 32% Searched

**?** 29% Other





### MOBILE DRIVES MULTI-CHANNEL BEHAVIOR – FOOD



Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Food searches n=263 Q: What were the outcomes of this search? Q: Which of the following did you do on your smartphone? Q: Which of the following have you done on laptop/desktop/tablet? Q: What other actions did you take in person?

### RESTAURANT

**56%** At Home

LOCATION













#### MOTIVATION

**79%** Needed info for future action or purchase

D 19% Other motivation

12% Came across something interesting

**7%** Passing Time



**53%** Web Browser





Other App



OUTCOME







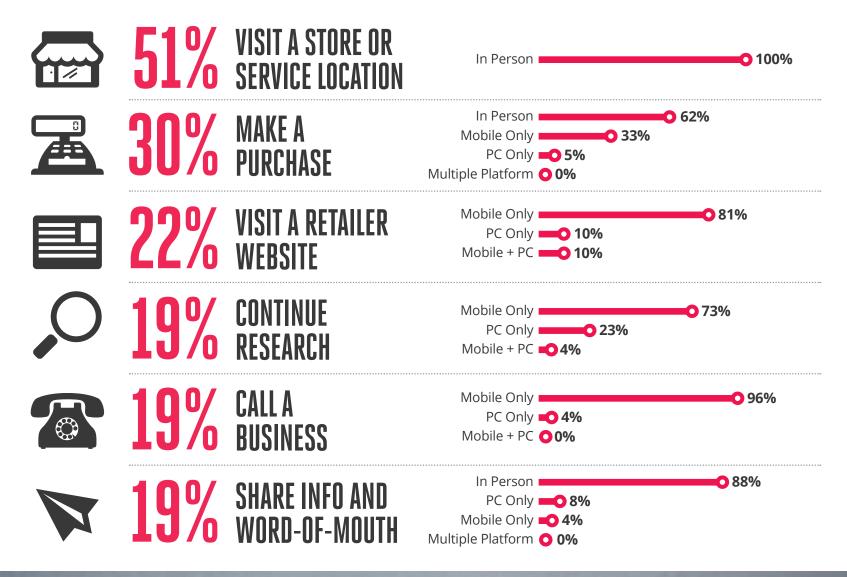
E 22% Retailer Website

O 19% Searched





### **MOBILE DRIVES MULTI-CHANNEL BEHAVIOR – RESTAURANT**



6 Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Restaurant searches n=140 Q: What were the outcomes of this search? Q: Which of the following did you do on your smartphone? Q: Which of the following have you done on laptop/desktop/tablet? Q: What other actions did you take in person?

### SHOPPING

LOCATION

**69%** At Home











**0%** Other Place

#### MOTIVATION

Ø

**68%** Needed info for future action or purchase

**21%** Came across something interesting

2 18% Other motivation

**17%** Passing Time



**1%** Other

#### OUTCOME







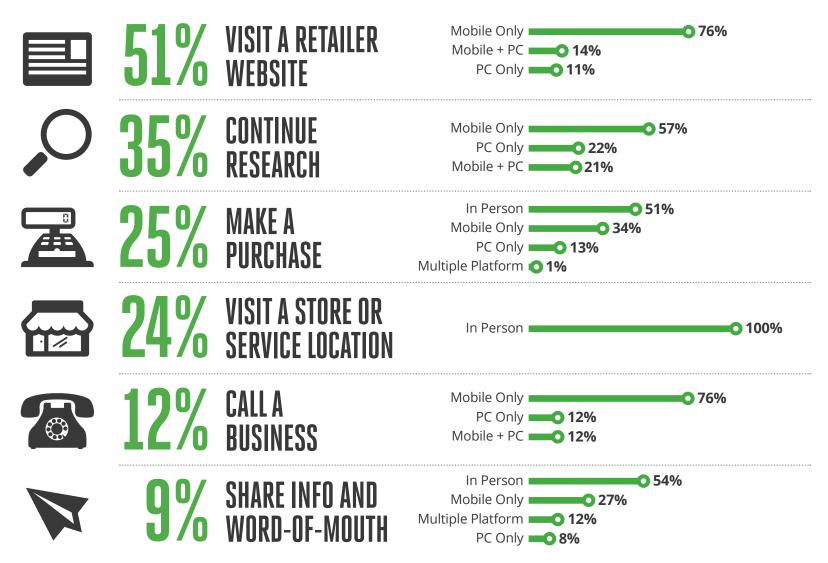


Z4% Visited a Store





### **MOBILE DRIVES MULTI-CHANNEL BEHAVIOR – SHOPPING**



Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Shopping searches n=288 Q: What were the outcomes of this search? Q: Which of the following did you do on your smartphone? Q: Which of the following have you done on laptop/desktop/tablet? Q: What other actions did you take in person?

### TECHNOLOGY

**70%** At Home

LOCATION







Someone Else's Home



**0%** Other Place

#### MOTIVATION

**50%** Needed info for future action or purchase

**34%** Came across something interesting

20% Passing Time

2 18% Other motivation INITIATED ON...

58% Web Browser

**37%** 



**2%** Other App

**?** 0% Other OUTCOME

Clicked Links





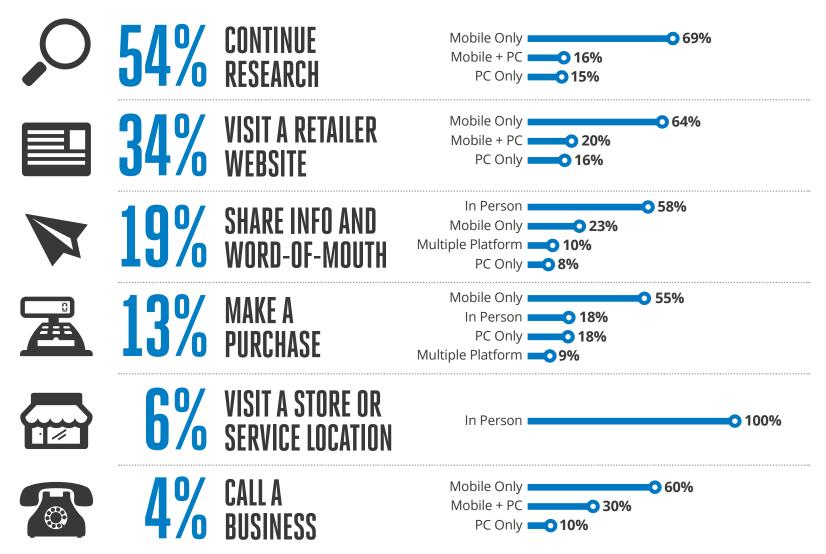
**29%** Other



13% Made a Purchase



### **MOBILE DRIVES MULTI-CHANNEL BEHAVIOR – TECH**



40

Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Technology searches n=351 Q: What were the outcomes of this search? Q: Which of the following did you do on your smartphone? Q: Which of the following have you done on laptop/desktop/tablet? Q: What other actions did you take in person?

### TRAVEL

LOCATION 60% At Home













#### MOTIVATION

**58%** Needed info for future action or purchase

**23%** Came across something interesting

22% Other motivation

**3 13%** Passing Time



**61%** Web Browser

**37%** 



Other App

(?) 0% Other

#### OUTCOME







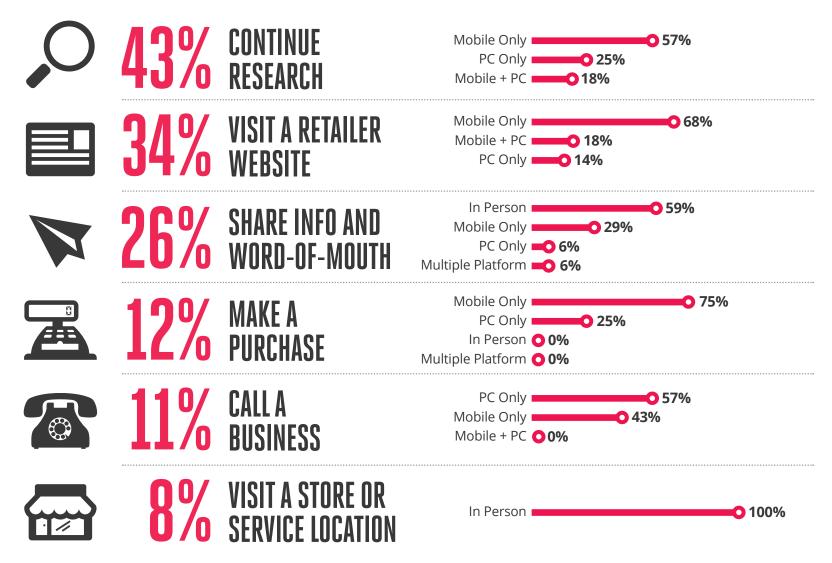
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### **MOBILE DRIVES MULTI-CHANNEL BEHAVIOR – TRAVEL**



Source: Google/Nielsen Life360 Mobile Search Moments Q4 2012. Base: Travel searches n=107 Q: What were the outcomes of this search?
Q: Which of the following did you do on your smartphone? Q: Which of the following have you done on laptop/desktop/tablet? Q: What other actions did you take in person?





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