

THE WORLD HAS GONE MULTI-SCREEN



How the mobile internet changes our lives



BEHIND THE NUMBERS

WHAT YOU'RE LOOKING FOR AND WHY IT MATTERS

WHY CONDUCT THIS RESEARCH NOW?

- We all feel that multi-device usage is growing in our personal environment and is changing our lives.
- To better understand these changes, Google commissioned three global studies: “The Connected Consumer Study”, “Our Mobile Planet” and „Mobile Purchase Journey“.

WHY SHOULD BUSINESSES CARE ABOUT THIS RESEARCH?

- Nearly two thirds of Brits use a smartphone and nearly a third use a tablet. As consumers access the web from everywhere, businesses should reach them in new ways.

WHAT WAS MOST SURPRISING ABOUT THE RESEARCH RESULTS?

- Brits on average use 3 connected devices.
- Smartphone penetration doubled in the last two years and tablet penetration tripled in the last year.
- 74% of smartphone users go online with their phone every day, 80% never leave the home without it and 54% search on their phone every day.

- 61% use their smartphone for product research or purchases.
- Mobile research influences purchases made on mobile and elsewhere. E.g. after researching travel products on smartphones, 12% purchased on mobile while 88% purchased on desktop, tablets or offline.

WHAT IS THE MAJOR LEARNING TO TAKE FROM THIS?

- Businesses need to make their sites work on all devices. They are likely to lose business if they don't.
- Advertisers need to serve ads across screens and learn to reach consumers in relation to the context they are in (based on device, time and location).

WHAT SHOULD MARKETERS DO NEXT?

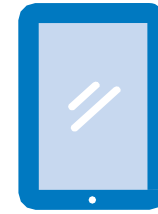
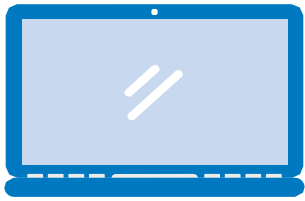
- Visit www.google.com/think/multiscreen for best practices in making your website work across multiple devices.
- Use AdWords enhanced campaigns to reach consumers at the moments that matter across devices with more relevant ads: more info on www.google.co.uk/adwords/enhancedcampaigns.



MULTI-SCREEN IS THE NEW NORMAL

3

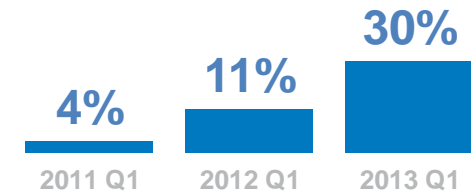
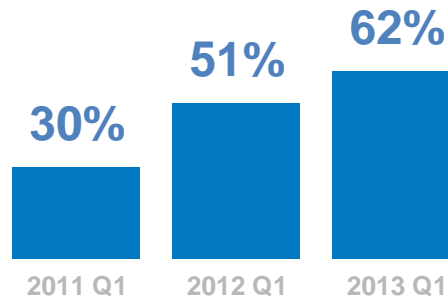
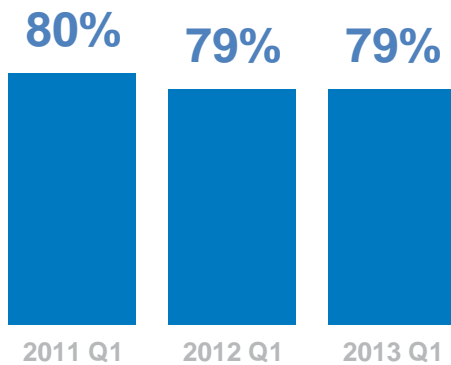
CONNECTED DEVICES ARE USED BY THE AVERAGE BRIT



LAPTOP/NETBOOK USE

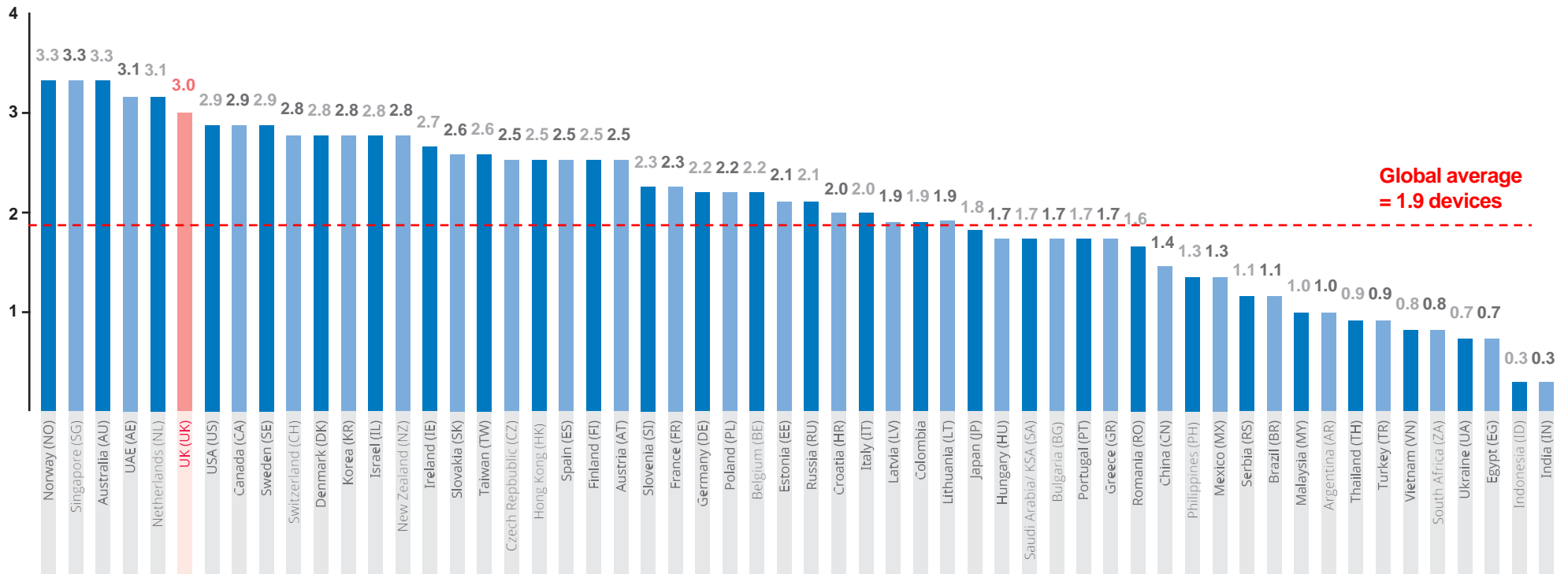
SMARTPHONE USE

TABLET USE



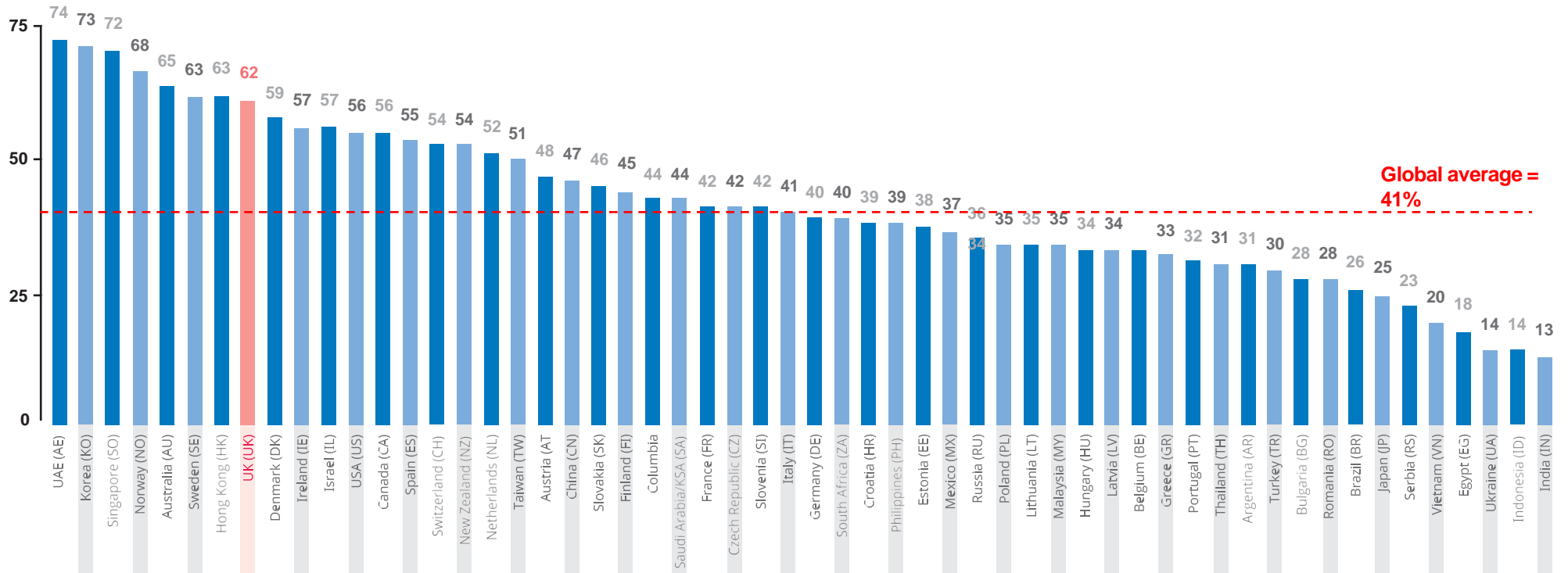
THE GLOBAL AVERAGE IS NEARLY TWO CONNECTED DEVICES PER PERSON

NUMBER OF INTERNET ENABLED DEVICES



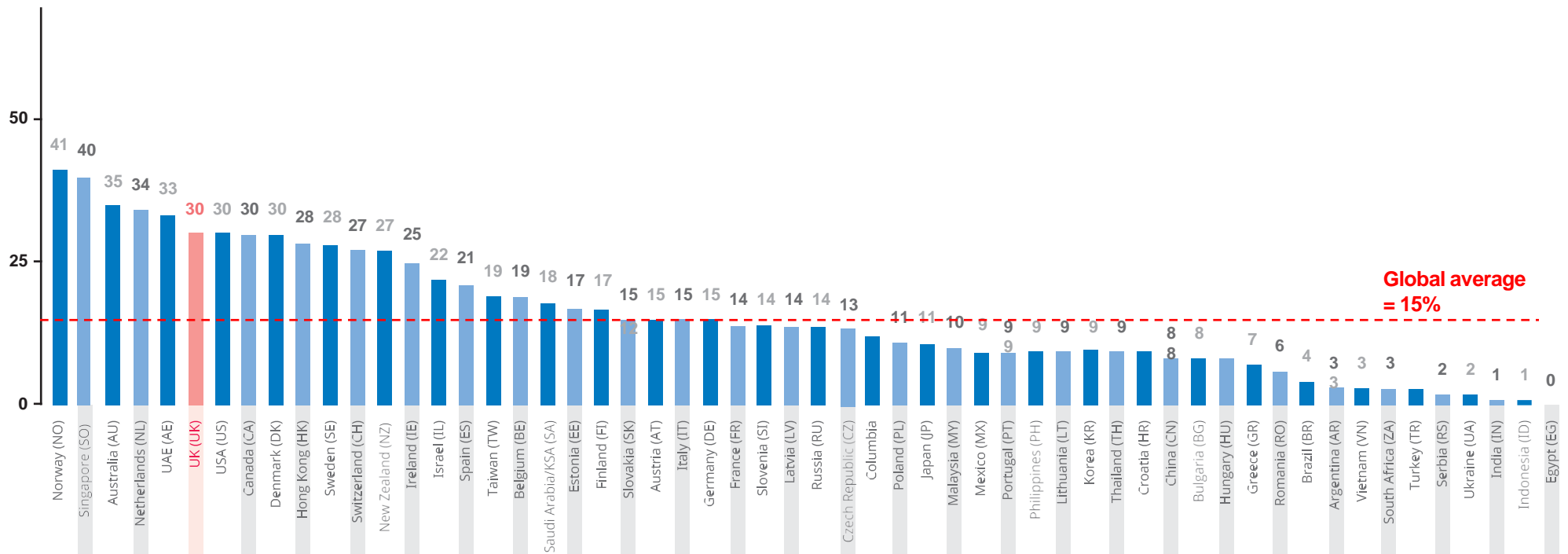
A MAJORITY WILL SOON OWN SMARTPHONES

% SMARTPHONE PENETRATION



AND TABLETS ARE RAPIDLY CATCHING UP

% TABLET PENETRATION



SMARTPHONES HAVE CHANGED BEHAVIOUR



80%

OF SMARTPHONE USERS
DON'T LEAVE HOME
WITHOUT THEIR DEVICE



74%

GO ONLINE WITH THEIR
SMARTPHONE EVERY DAY

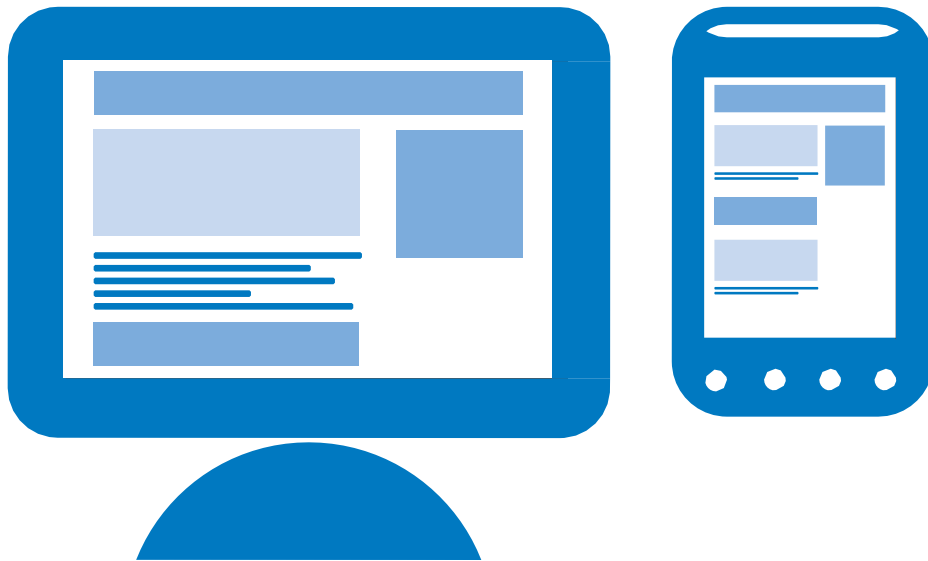


55%

SEARCH ON THEIR
SMARTPHONE EVERY DAY



THIS MEANS MOBILE-FRIENDLY SITES ARE ESSENTIAL



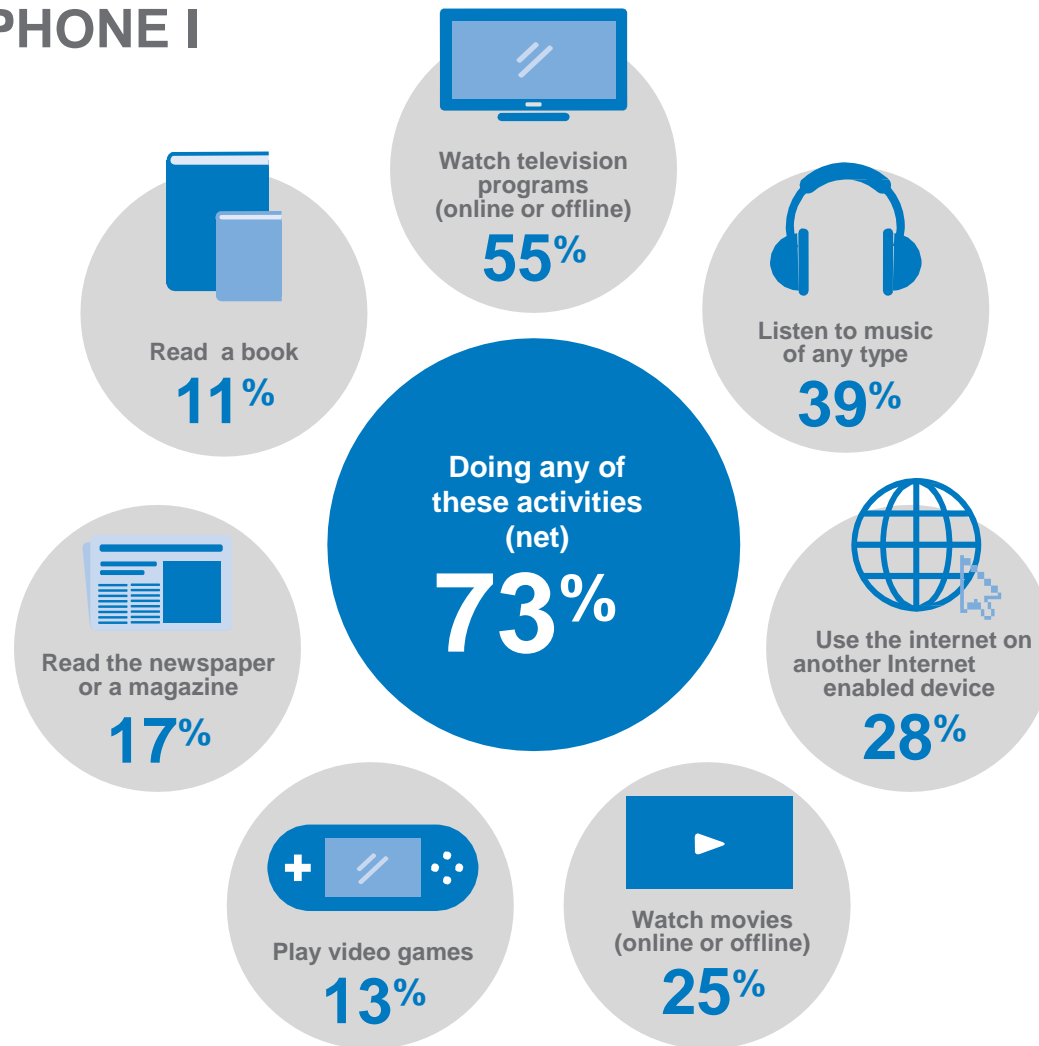
66%

**OF SMARTPHONE USERS
EXPECT SITES TO WORK
AS WELL ON THEIR MOBILE
AS ON THEIR DESKTOP**



SMARTPHONE OWNERS USE MORE THAN ONE SCREEN SIMULTANEOUSLY

AT THE SAME TIME WHEN I USE MY SMARTPHONE I ALSO...



SMARTPHONES EMPOWER CONSUMERS TO DO MORE...

83%



BROWSED THE INTERNET

82%



TOOK A PHOTO OR VIDEO

79%



EMAILED (SENT OR READ)

77%



USED A SEARCH ENGINE

72%



USED AN APPLICATION (APP)

69%



LOOKED UP DIRECTIONS OR USED A MAP

67%



ACCESSED A SOCIAL NETWORK

64%



PLAYED GAMES

62%



LISTENED TO MUSIC



... INCLUDING RESEARCHING AND PURCHASING PRODUCTS



61%

OF SMARTPHONE
OWNERS USE
THEIR
SMARTPHONES
TO RESEARCH
OR PURCHASE



SMARTPHONE OWNERS RESEARCH PRODUCTS EVERYWHERE



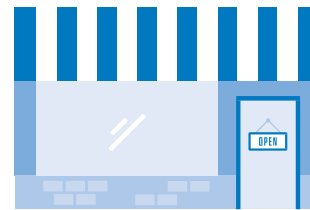
AT HOME

52%



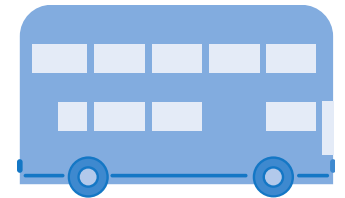
ON THE GO

25%



IN A
STORE

18%



PUBLIC
TRANSPORT

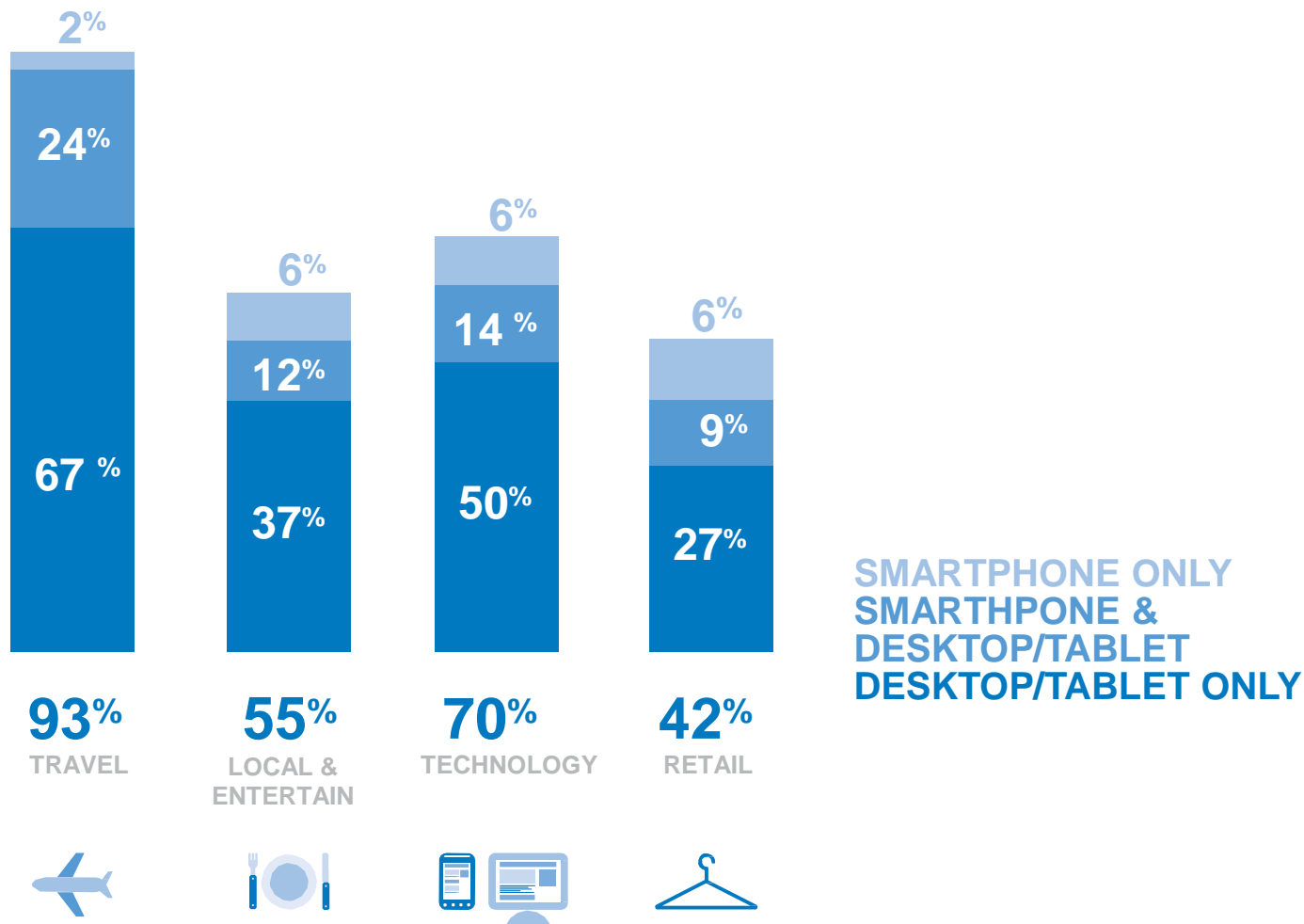
19%



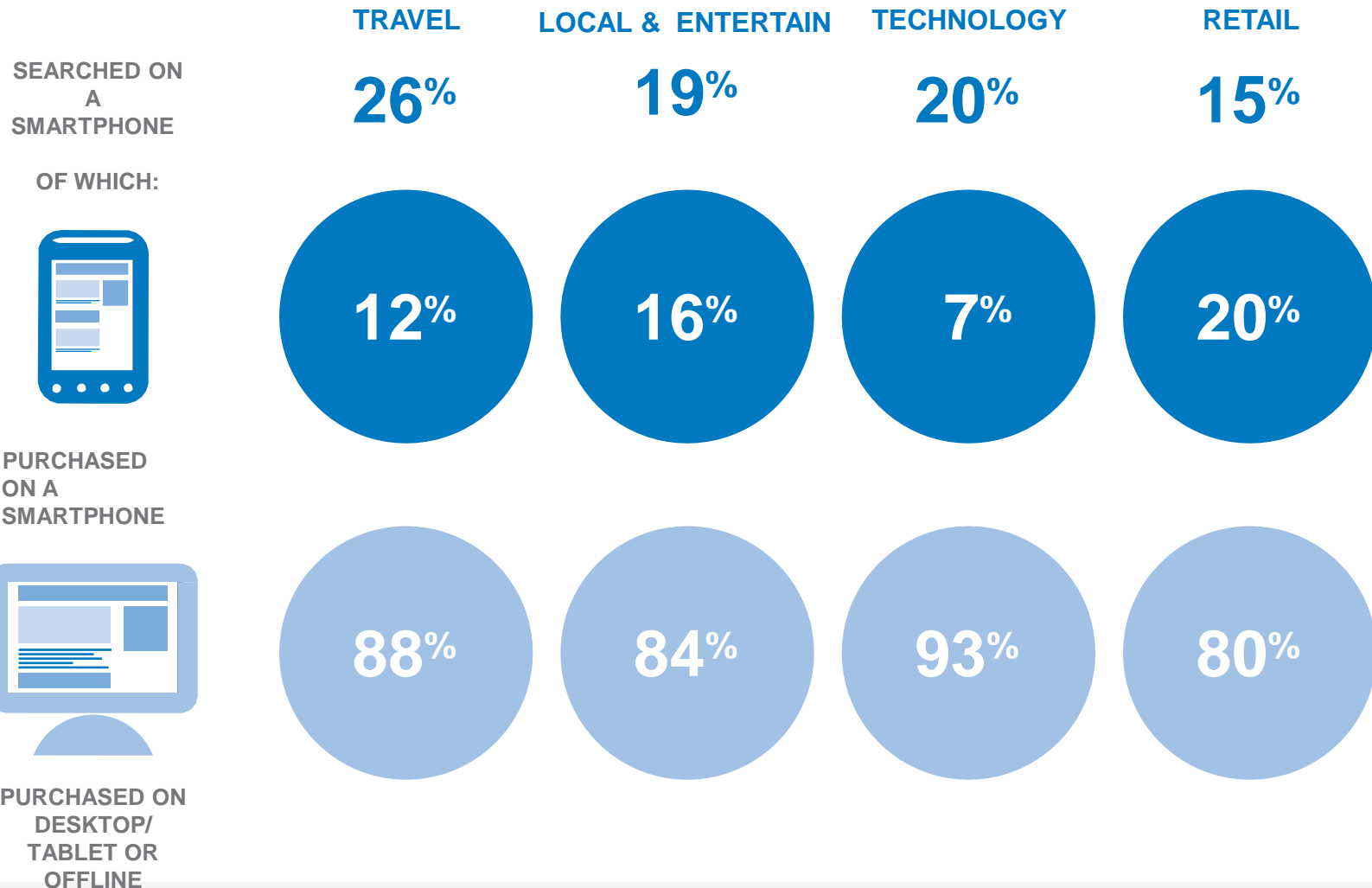
MOBILE SHOPPING RESEARCH DIFFERS THROUGHOUT THE DAY



OVERALL ONLINE RESEARCH IS DIFFERENT ACROSS DIFFERENT VERTICALS



FOLLOWING SMARTPHONE RESEARCH, THE PURCHASE IS MAINLY DONE ON OTHER DEVICES



SUMMARY OF KEY TAKEAWAYS

MULTI-SCREEN IS HERE, NOW

- Smartphone use in the UK doubled in two years, tablet use tripled in a year with smartphones at 62%, tablets at 30% and desktops & laptops at 79%.

SMARTPHONES ARE USED TO RESEARCH AND PURCHASE

- 61% use their smartphone to research and purchase.
- And mobile research influences purchases also on other devices. E.g. after researching travel products on smartphones, 12% purchase on their mobile and 88% purchase on desktop, tablet or offline.

PEOPLE EXPECT SITES TO WORK ON ANY DEVICE

- Two thirds of smartphone users expect sites to work as well on their mobile as on their desktop.

OPTIMISE SITES ACROSS SCREENS

- Rising multi-screen behavior means that a good user experience across devices is a must have. Visit www.google.com/think/multiscreen for best practices.

CONTEXT IS KEY

- Context such as location, time of day and device provide advertisers opportunities to reach potential customers with more relevant messages.

BOOK ADS ACROSS SCREENS

- Google AdWords enhanced campaigns helps advertisers to reach customers easily across screens.
- Visit www.google.co.uk/adwords/enhancedcampaigns to learn more about enhanced campaigns.



SUMMARY OF RESEARCH METHOD

CONNECTED CONSUMER STUDY:

BACKGROUND: **TO BETTER UNDERSTAND HOW PEOPLE USE DIFFERENT DEVICES TO ACCESS THE INTERNET**

PERIOD: : **Q1 2013**

NUMBER OF COUNTRIES: **56**

SAMPLE SIZE: **MINIMUM 1000 PER COUNTRY**

BASE: **REPRESENTATIVE OF TOTAL COUNTRY POPULATION (ADULTS)**

RESEARCH PARTNER: **TNS**

WWW.CONSUMERBAROMETER.COM

OUR MOBILE PLANET:

BACKGROUND: **TO DEEP DIVE INTO THE BEHAVIOUR OF SMARTPHONE OWNERS**

PERIOD: **Q1 2013**

NUMBER OF COUNTRIES: **47**

SAMPLE SIZE: **MINIMUM 1000 PER COUNTRY**

BASE: **REPRESENTATIVE OF SMARTPHONE OWNERS (ADULTS)**

RESEARCH PARTNER: **ISPOS**

[WWW.THINKWITHGOOGLE.COM/MO
BILEPLANET](http://WWW.THINKWITHGOOGLE.COM/MOBILEPLANET)

MOBILE PURCHASE JOURNEY:

BACKGROUND: **TO BETTER UNDERSTAND WHERE PEOPLE USE SMARTPHONES IN THE RESEARCH AND PURCHASE PROCESS FOR NEW PRODUCTS**

PERIOD: **Q2 2013**

NUMBER OF COUNTRIES: **37**

SAMPLE SIZE: **MINIMUM 2000 PER COUNTRY**

BASE: **REPRESENTATIVE OF SMARTPHONE USERS (ADULTS)**

RESEARCH PARTNER: **TNS**

