

March 2015

Mobile Search Moments Canada

**Understanding How Mobile
Drives Conversions**



think with **Google**[™]

THE ORIGIN



Understand **mobile search**



Uncover mobile search and **multi-channel conversions**



Determine if mobile search is **in the moment**



Understand perceptions of **mobile search ads**



Dig into search experience by **category**

THE APPROACH

An ethnographic study of Canadian smartphone users to understand their mobile conversion behaviour



Step 1: Recruit smartphone users respondent recruitment, January 6–26, 2015



Step 2: Capture their search moments mobile search diary, February 2–19, 2015



Step 3: Probe outcomes trigger survey, February 3–18, 2015



Step 4: Quality check exit survey, February 24–March 5, 2015

OUR FINDINGS

The mobile search trifecta:

Key to winning moments that matter

Mobile search in Canada is...

Always-On

8/10

of mobile searches
occur at home or
at work.

Purposeful

41%

of mobile searches
are goal-oriented.

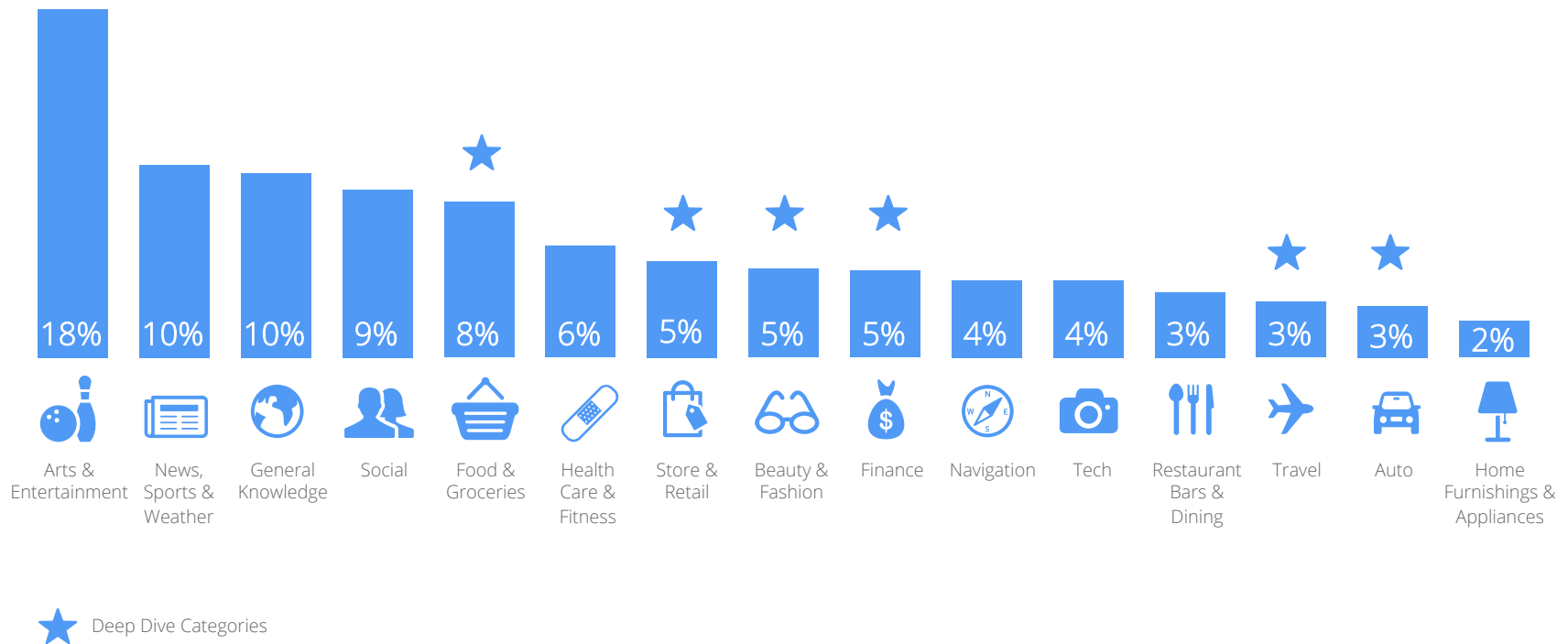
Immediate

75%

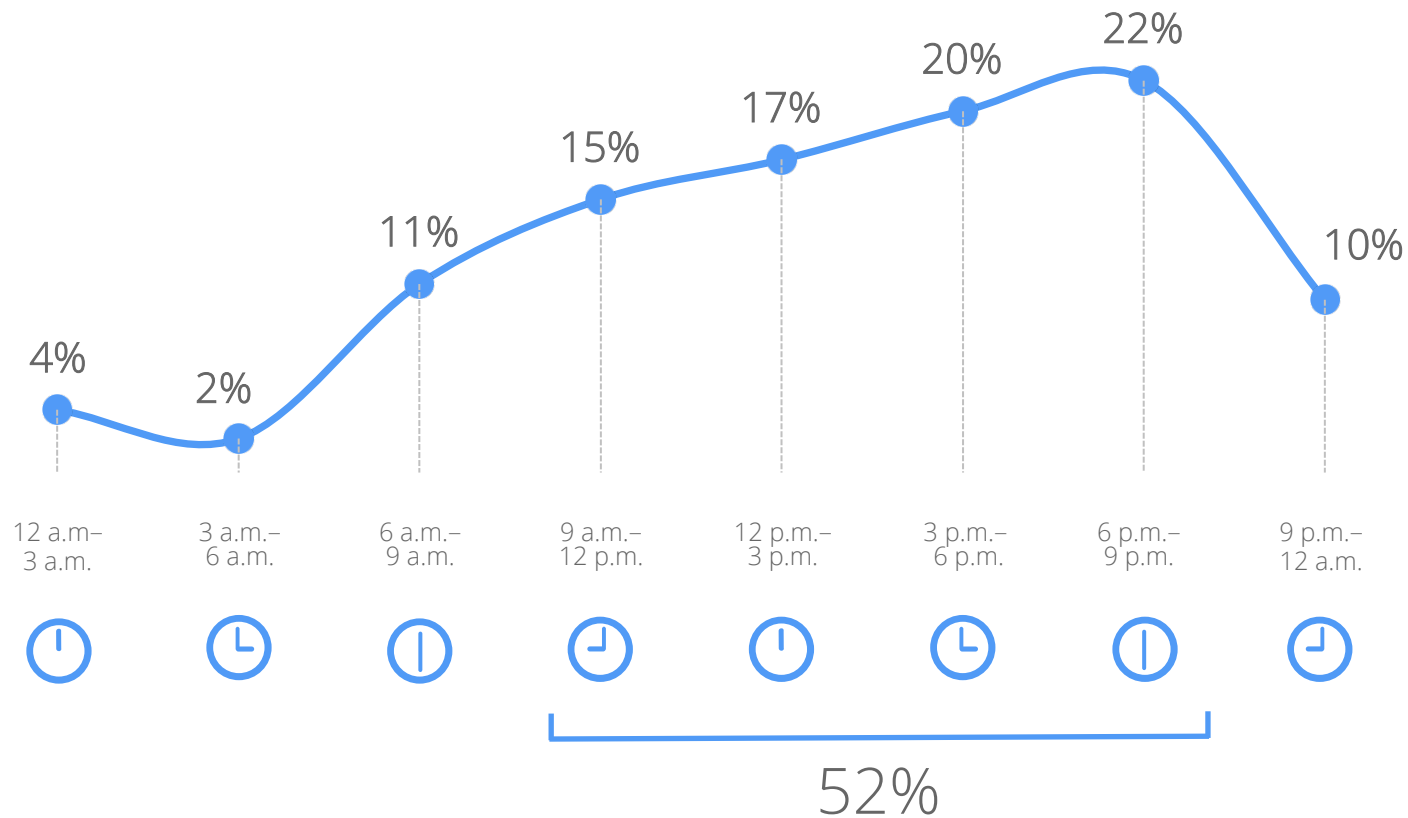
of mobile conversions
take place within one
hour of the search.

Understanding Mobile Search

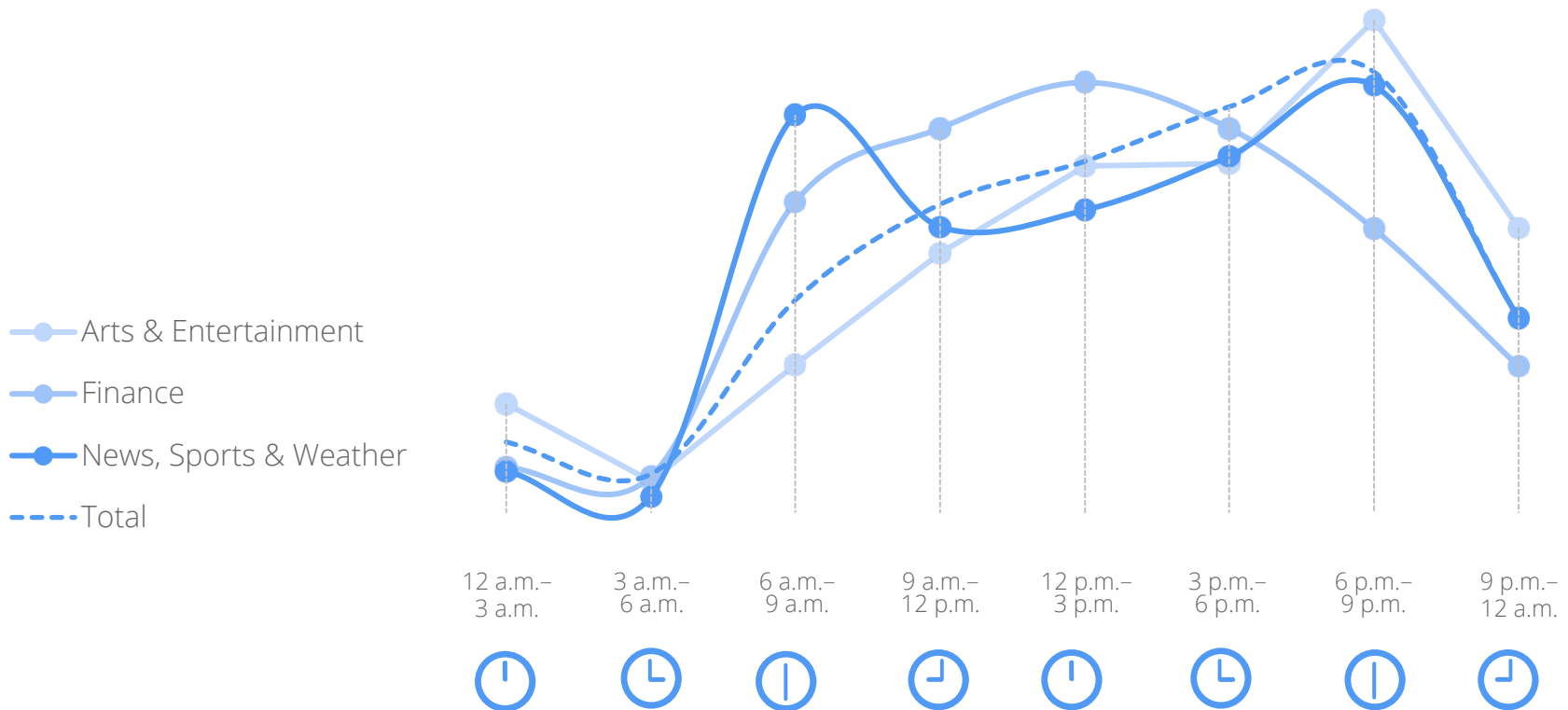
Mobile users search for a **wide variety** of information.



Half of mobile searches take place **during working hours.**



Search traffic reflects **human behaviour**.

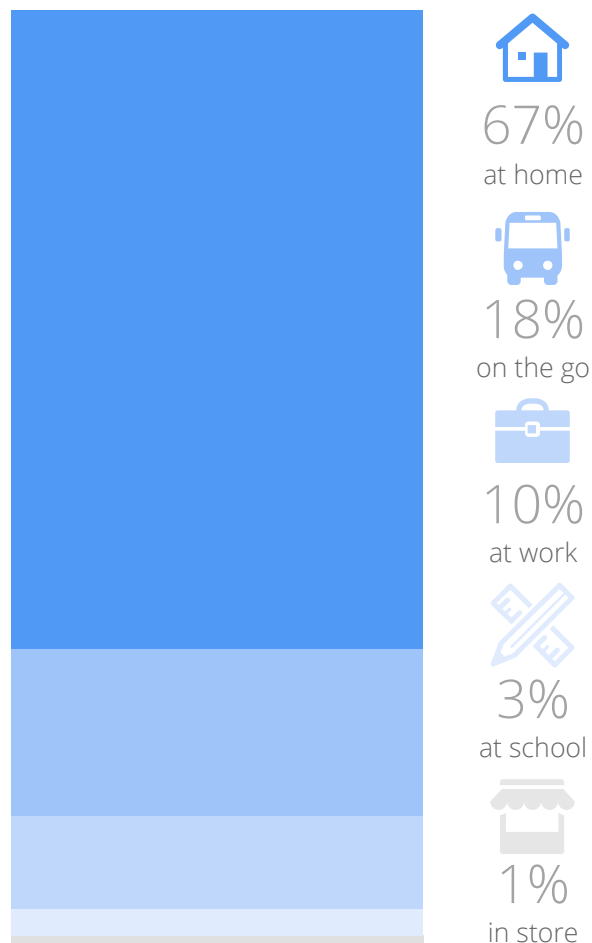


We live in a cross-screen world.
Mobile search is **always-on**.



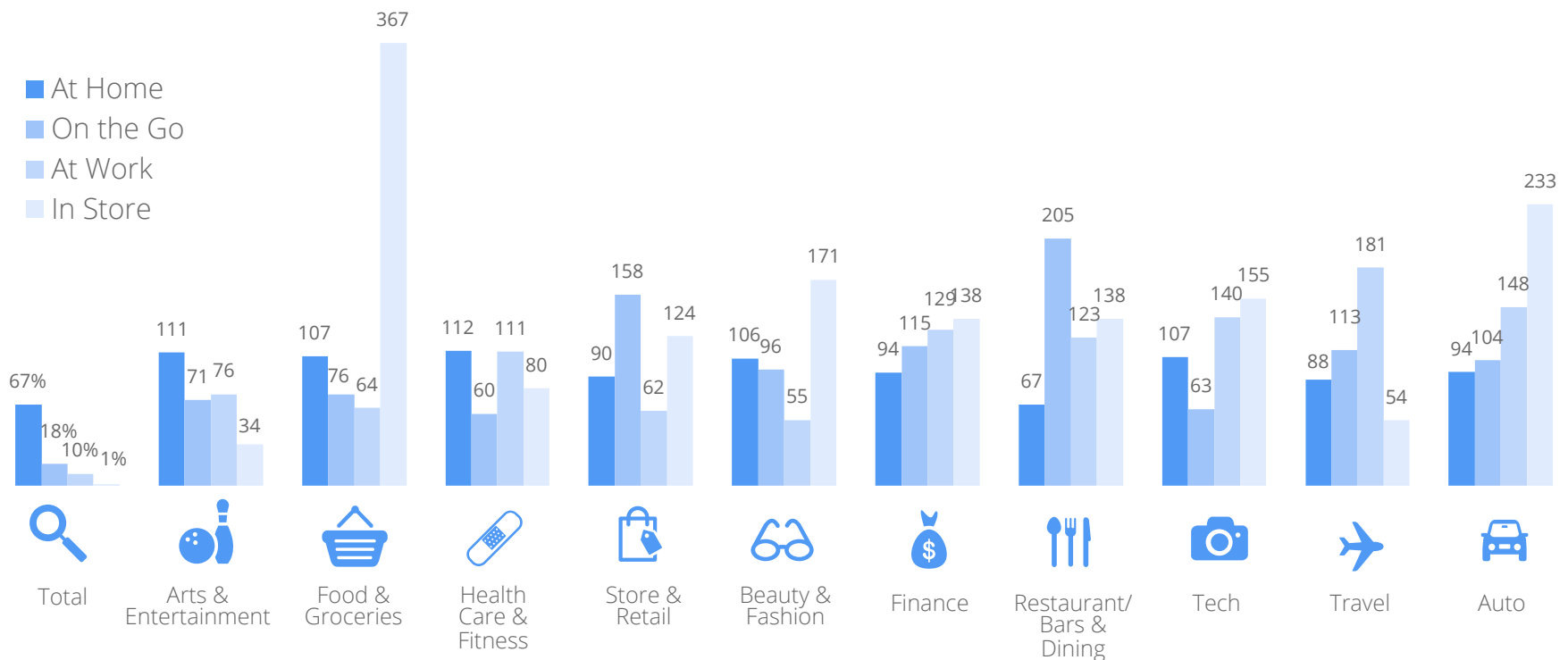
80%

of mobile searches happened
where a **computer is available**.

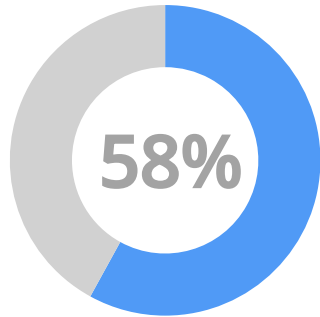


Categories of mobile search vary **based on location.**

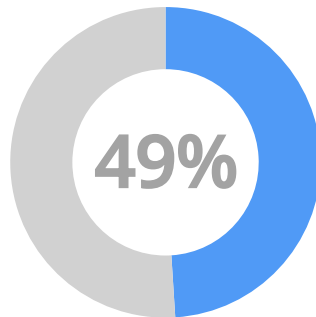
Index of different mobile searches by context



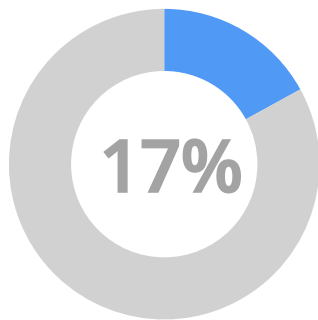
Mobile search is **fast and convenient**.



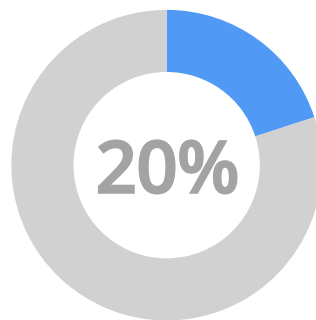
Most **convenient**
way to search



Quickest way
to search



Urgent that I find the
info right away



Always use my
mobile device for
this type of search



79%

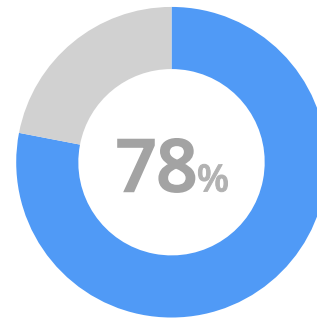
of mobile searches are
driven by **speed, convenience,
or urgency**.

Mobile searches **have purpose.**

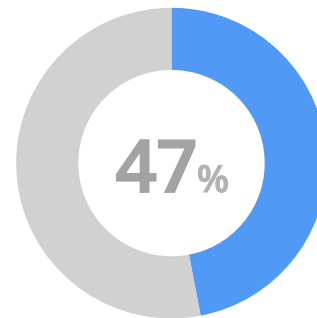


41%

of all mobile searches
are **goal-oriented**.



In a store



On the go

Source: Google Canada Nielsen Mobile Search Moments 2015. Base: Total mobile searches n=4,893.

(Searches conducted in a store n = 64; Searches conducted at work n = 480;

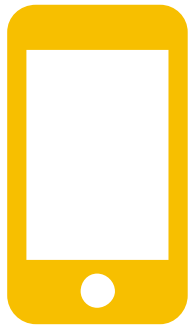
Searches conducted on the go = 863; Searches conducted at home n = 3,288)

Q8: Why did you conduct this search?

Note, 'Goal Oriented' actions include 'deciding whether to buy a product/service.' and 'Needed info for next action'.

Mobile Search Drives Multi-Channel Conversions

It **doesn't stop** at the search.



77%

mobile searches
lead to action.

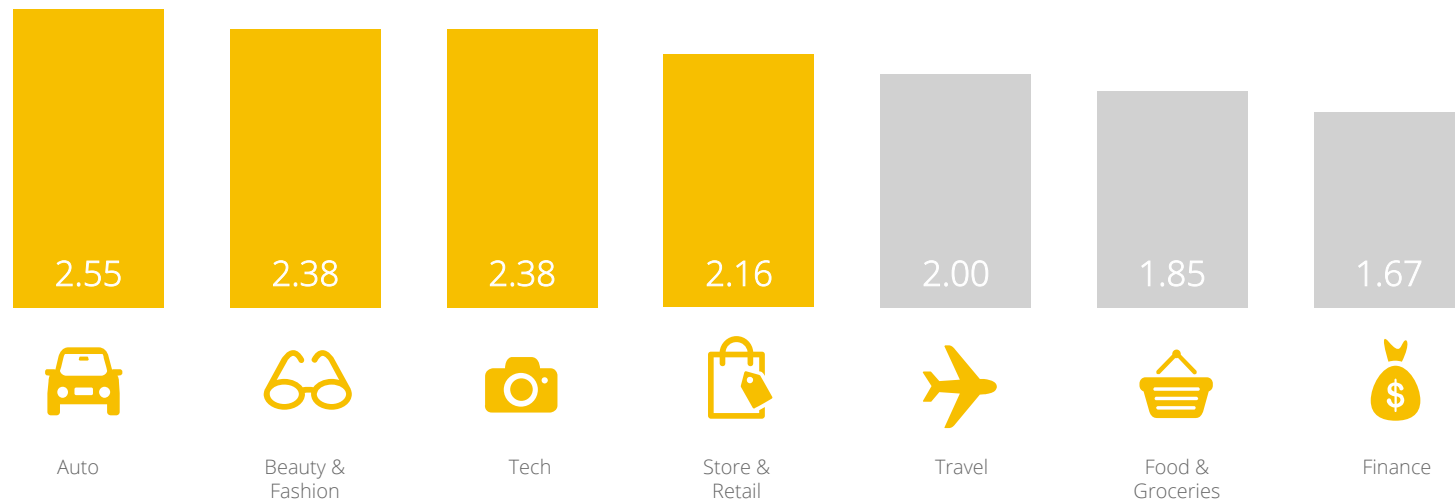


2.1

actions per
mobile search.

Some categories **trigger more** follow-up actions.

Average number of follow-up actions per mobile search: **2.1 total**



Post-search **actions** taken:

77% are a mix of either **conversion** or **non-conversion** activities.



Made a purchase



Clicked links on a search results page



Downloaded something



Searched for more information



Visited a store



Watched or listened to something



Visited a retailer's website



Shared information



Called a business



Took a photo

Deep dive
categories:



Food &
Groceries



Store &
Retail



Beauty &
Fashion



Finance



Tech



Travel



Auto

Source: Google Canada Nielsen Mobile Search Moments 2015.

QT3A: What specifically did you proceed to do after your initial search using your smartphone?

QT3B: What specifically did you proceed to do after your initial search using other devices?

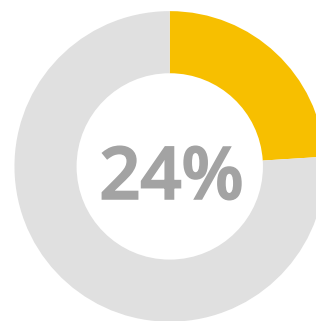
QT3C: What specific actions, if any, did you take in-person? (Please select all that apply)

Mobile search drives **valuable outcomes**.

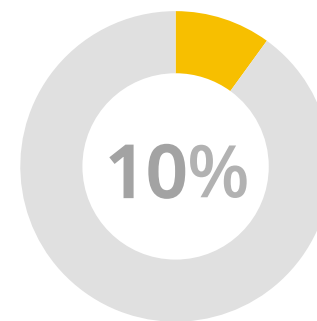


37%

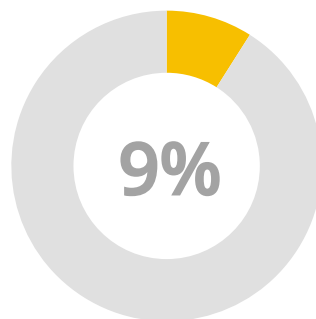
of mobile searches result in **conversions**
(store/website visit, call, purchase, download).



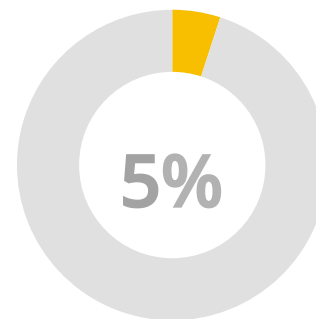
Visited a retailer's website



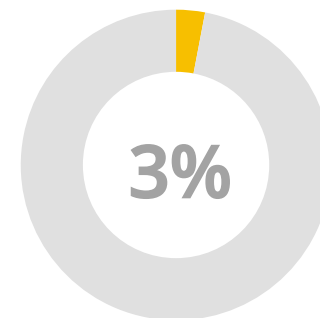
Visited a store



Made a purchase



Called a business



Downloaded something

Source: Google Canada Nielsen Mobile Search Moments 2015. Base: Outcome survey completes n=973.

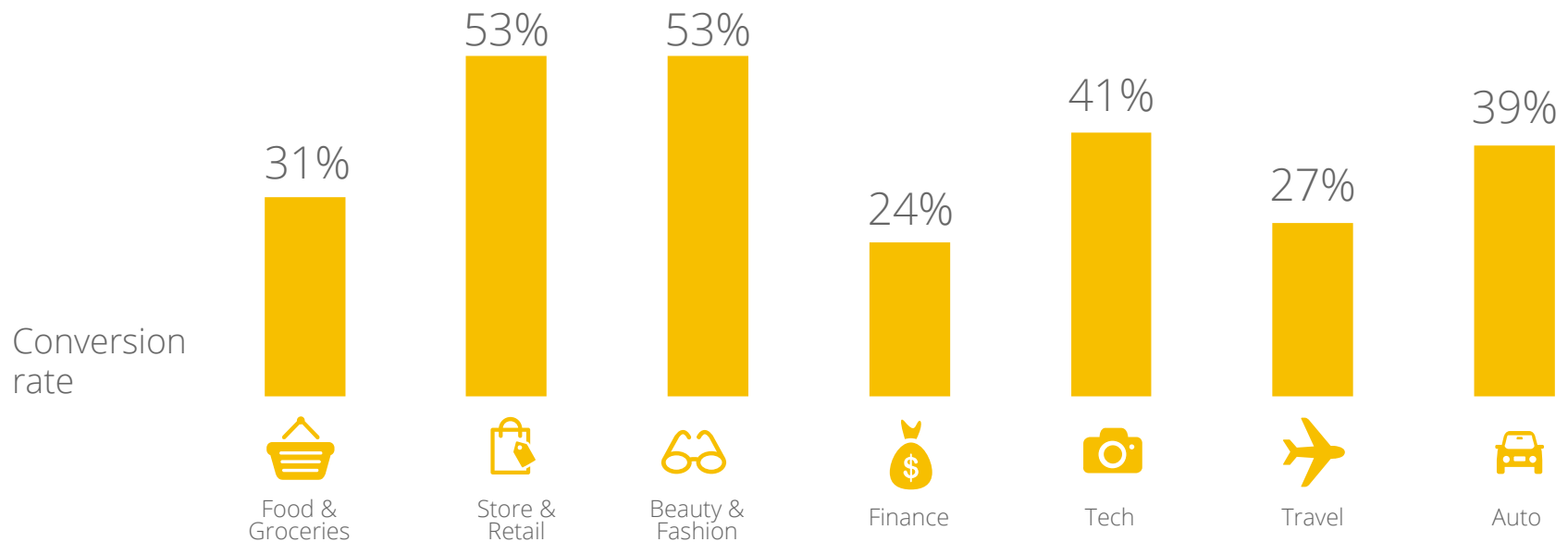
QT3A: What specifically did you proceed to do after your initial search using your smartphone?

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QT3C: What specific actions, if any, did you take in-person? (Please select all that apply)

Note, conversion is based on the following categories: Auto, Beauty & Fashion, Finance, Food & Groceries, Store & Retail, Technology and Travel

Retail and Beauty & Fashion register **high conversion rates**.



Mobile Search Drives
Immediate Behaviour

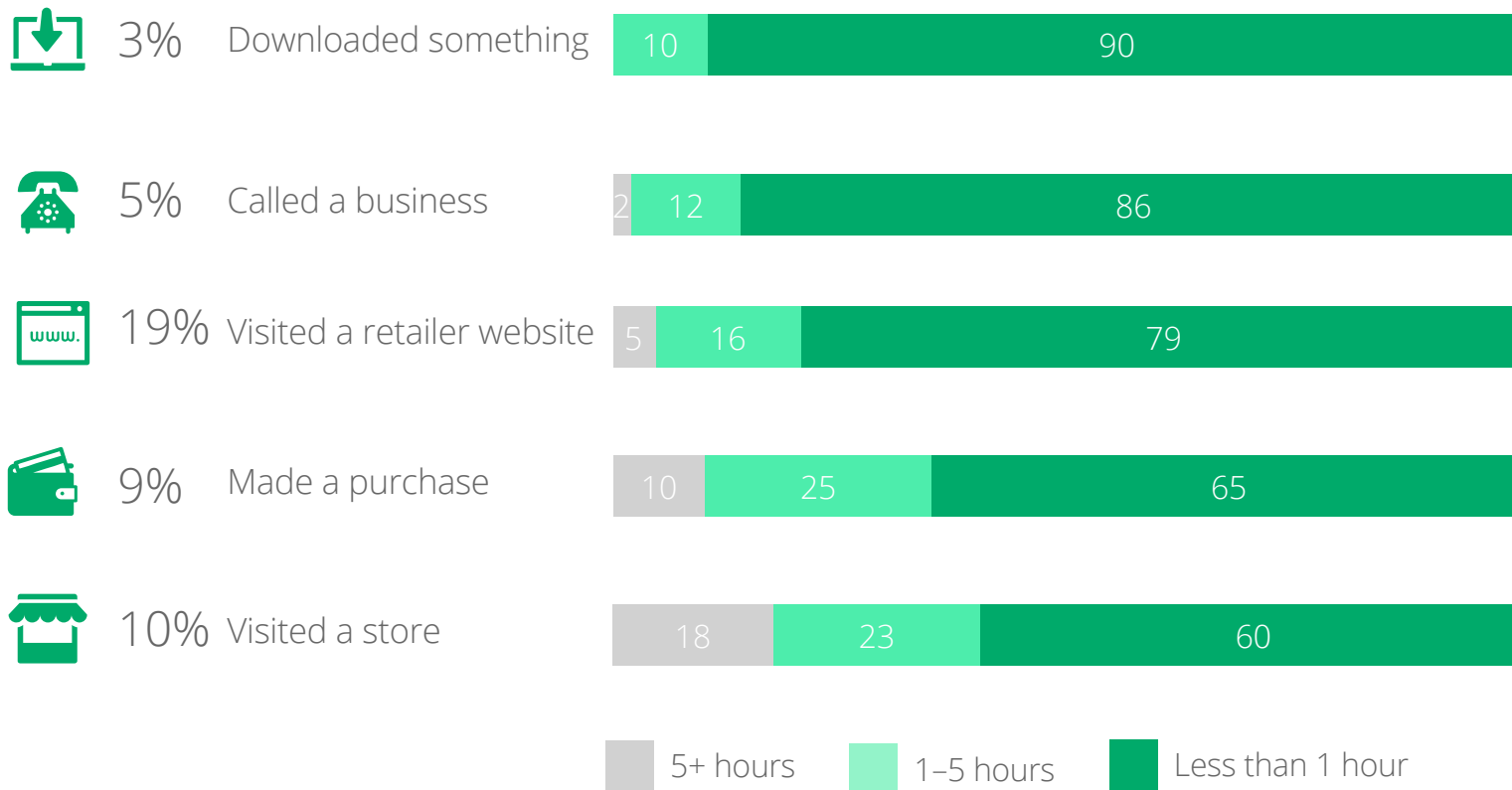
Mobile searches trigger **quick follow-ups**.



75%

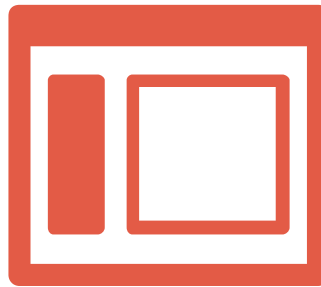
of conversions occur
within one hour of the
initial mobile search.

Mobile searches trigger **quick** online and offline actions.



Perceptions of Mobile Search Ads

Consumers **notice** mobile search ads.



62%

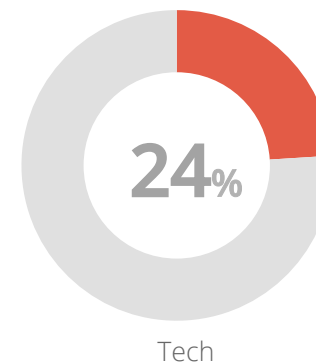
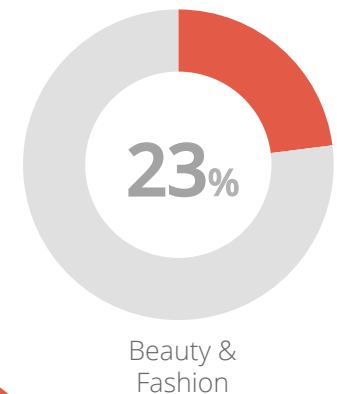
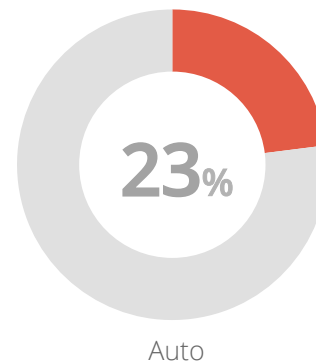
of respondents **noticed**
ads during the study.

Mobile search **helps people recall your brand.**

1/5
searches resulted in
ad recall.

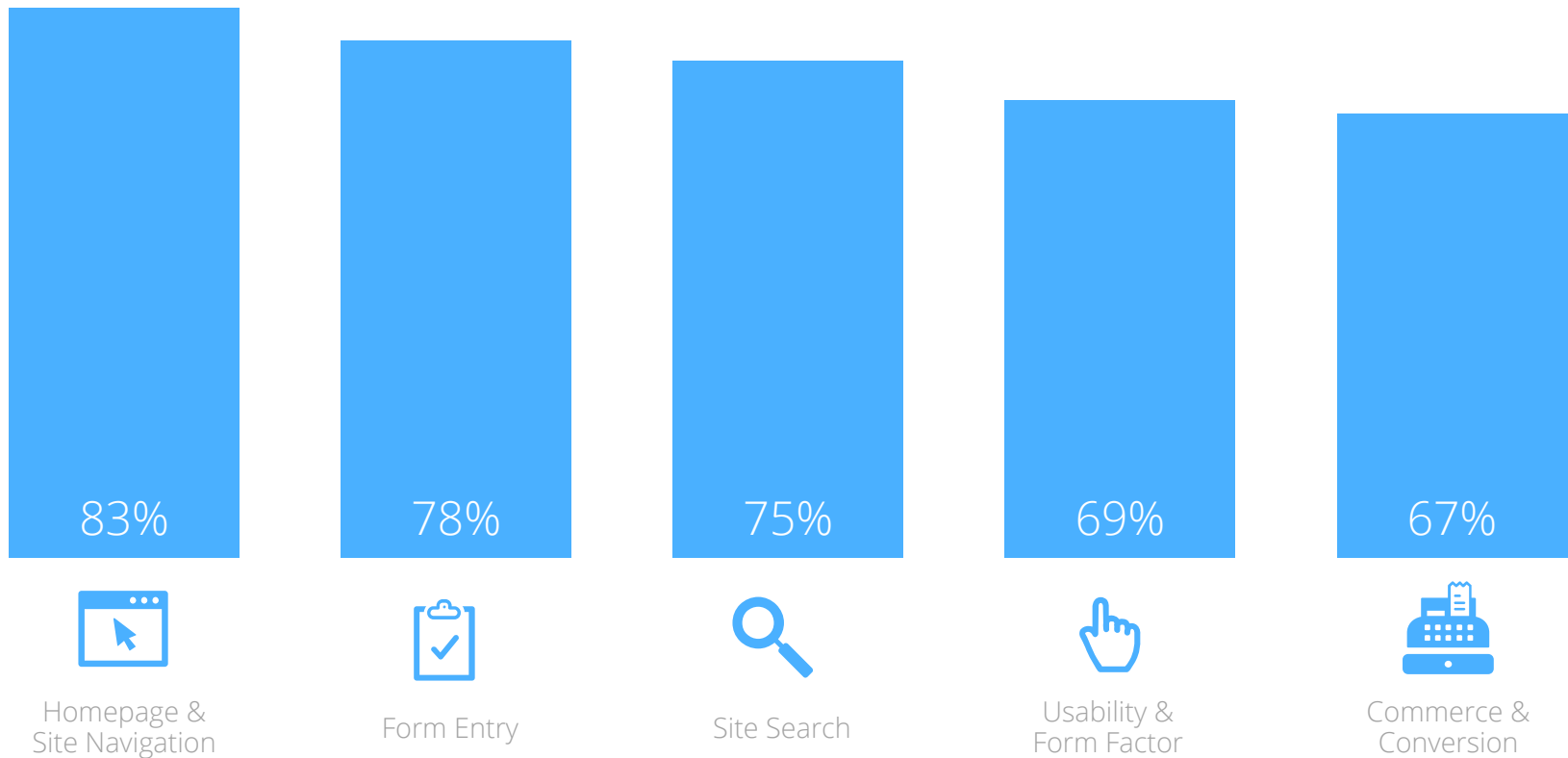
51%
of all ads seen had
brand recall.

The categories that were most noticed were:



Mobile UX Expectations

Important Features and Functionalities of Mobile Site Design



Source: Google Canada Nielsen Mobile Search Moments 2015. Base: All Exit Survey Respondents, n=248.
E6. Following is a list of features and functionalities that people consider when visiting websites on their smartphones.
Please indicate below how important you consider each feature or functionality to be when accessing mobile websites on your smartphone.

25 PRINCIPLES OF MOBILE SITE DESIGN

			% Extremely/ Very Important	Category Average
	Homepage & Site Navigation	<ul style="list-style-type: none"> <input type="checkbox"/> Calls-to-action are front and center <input type="checkbox"/> Menus are short and sweet <input type="checkbox"/> Easy to get back to the homepage <input type="checkbox"/> Promotions don't steal the show 	82% 86% 86% 79%	83%
	Site Search	<ul style="list-style-type: none"> <input type="checkbox"/> Site search is visible <input type="checkbox"/> Site search results are relevant <input type="checkbox"/> Use filters to improve search results <input type="checkbox"/> Guides users to better search results 	84% 89% 73% 52%	75%
	Commerce & Conversions	<ul style="list-style-type: none"> <input type="checkbox"/> Users can explore before committing <input type="checkbox"/> Users can purchase as a guest <input type="checkbox"/> Existing information is used <input type="checkbox"/> Click-to-call is present for complex tasks <input type="checkbox"/> Easy to finish converting on another device 	89% 62% 58% 62% 62%	67%
	Form Entry	<ul style="list-style-type: none"> <input type="checkbox"/> Info entry is streamlined <input type="checkbox"/> Uses toggles/dropdowns to simplify input <input type="checkbox"/> Visual calendars used for date selection <input type="checkbox"/> Minimize errors with labeling and real-time validation <input type="checkbox"/> Form design is efficient 	89% 75% 72% 70% 85%	78%
	Usability & Form Factor	<ul style="list-style-type: none"> <input type="checkbox"/> Entire site is optimized for mobile <input type="checkbox"/> Don't need to pinch + zoom <input type="checkbox"/> Product images are expendable <input type="checkbox"/> Shoppers are told which screen orientation works best <input type="checkbox"/> Users aren't brought to new browser windows <input type="checkbox"/> Site avoids "full site" labeling <input type="checkbox"/> Site is clear about why it needs user's location 	84% 63% 83% 48% 69% N/A 69%	69%

Source: Google Canada Nielsen Mobile Search Moments 2015. Base: All Exit Survey Respondents, n=248.
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ONE MORE TIME...

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MOBILE SEARCH

CREATING MOMENTS THAT MATTER

For more info about reaching consumers in the moments that matter, visit <http://goo.gl/SH5LpC>.

