



MOBILE SEARCH MOMENTS CANADA

UNDERSTANDING HOW MOBILE DRIVES CONVERSIONS

MARCH 2015

Google

nielsen



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%

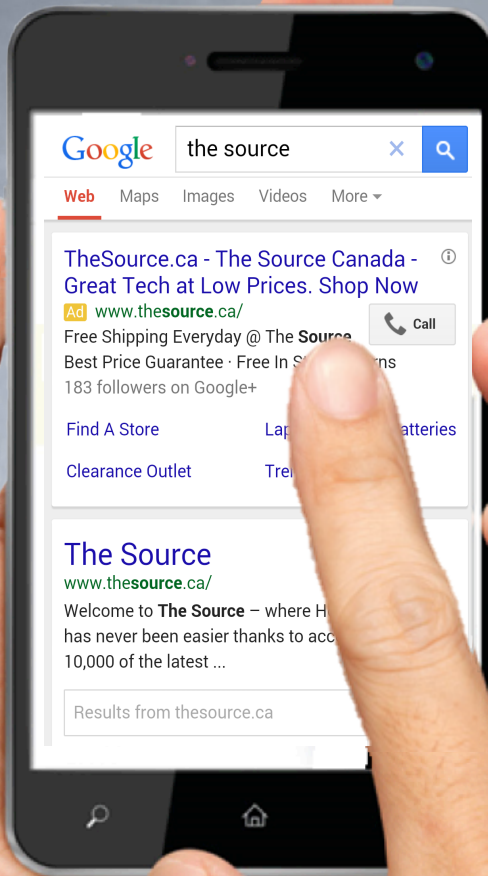
of mobile searches
are goal-oriented



IMMEDIATE

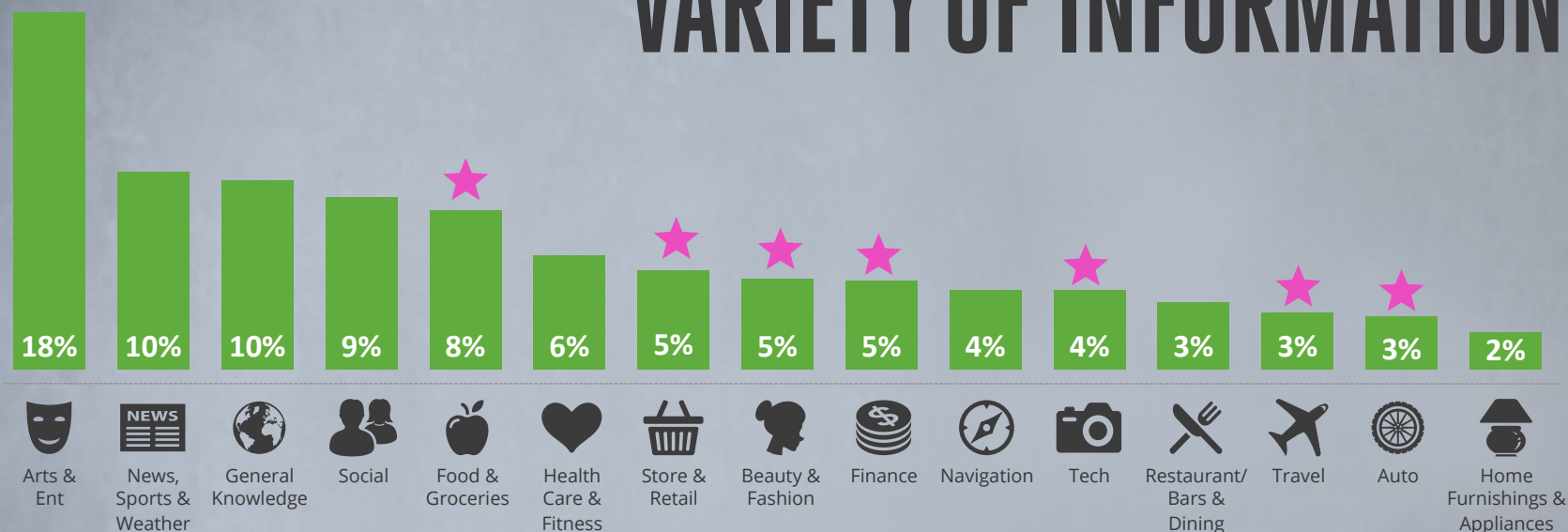
75%

of mobile conversions take place
within 1 hour of the search



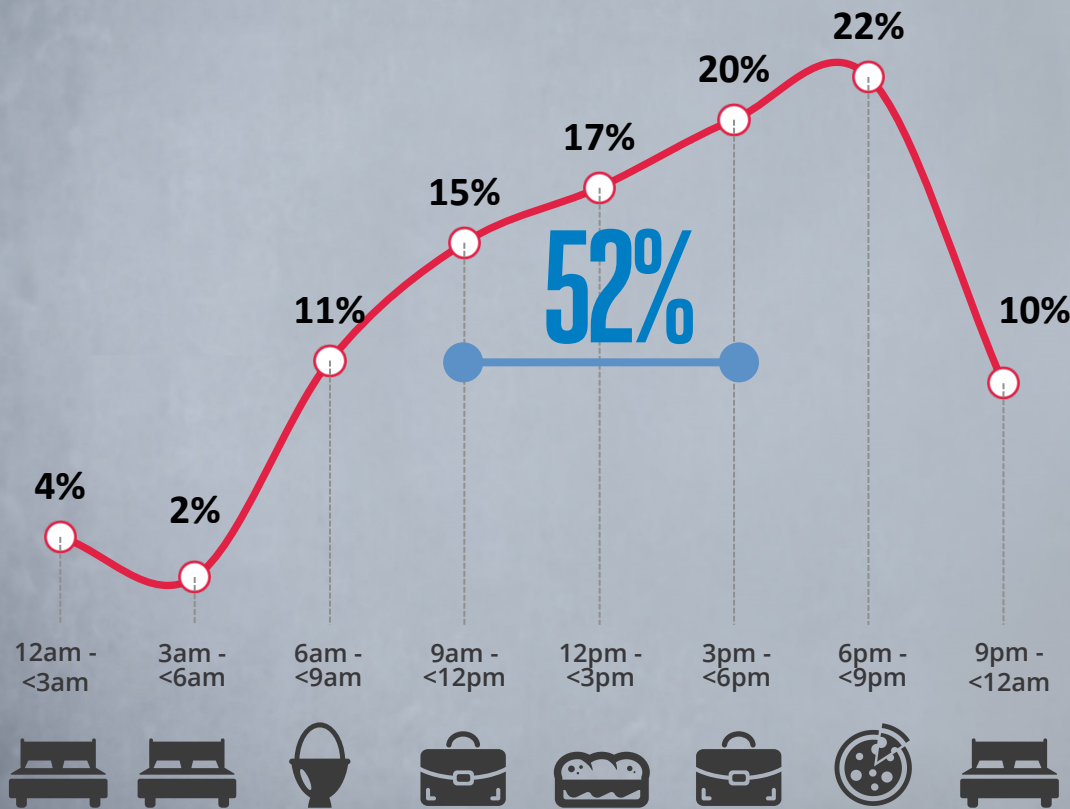
UNDERSTANDING MOBILE SEARCH

MOBILE USERS SEARCH FOR A WIDE VARIETY OF INFORMATION



★ Deep Dive Categories

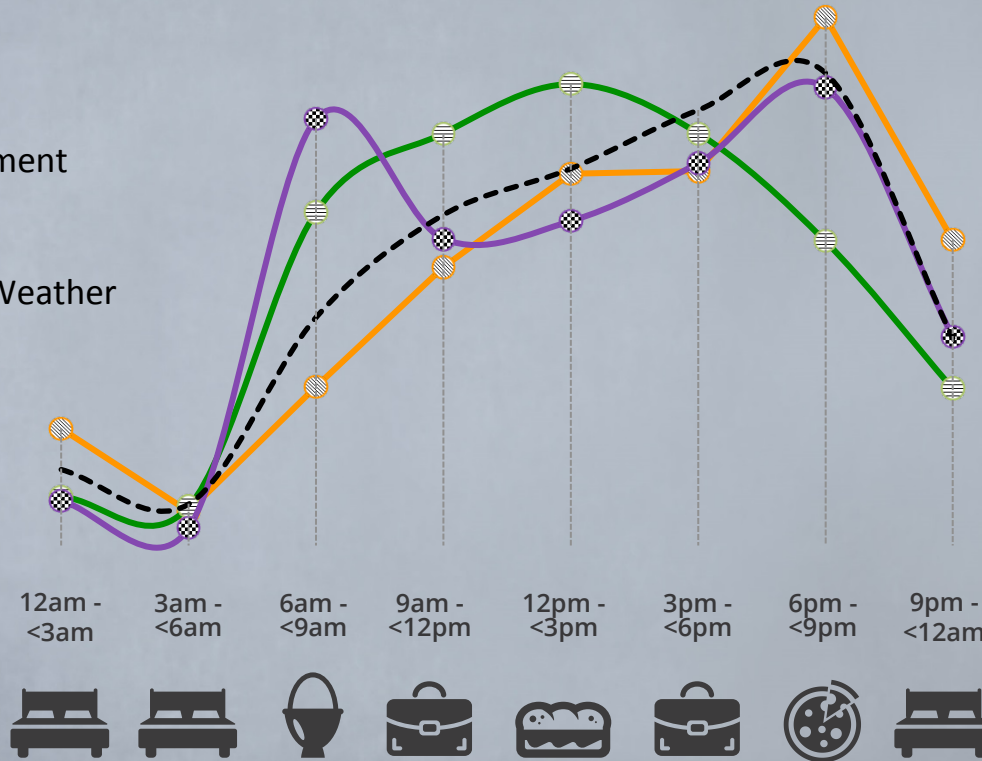
HALF OF MOBILE SEARCHES TAKE PLACE DURING WORKING HOURS



SEARCH TRAFFIC REFLECT HUMAN BEHAVIOUR

CATEGORY

- Arts & Entertainment
- Finance
- News, Sports & Weather
- Total



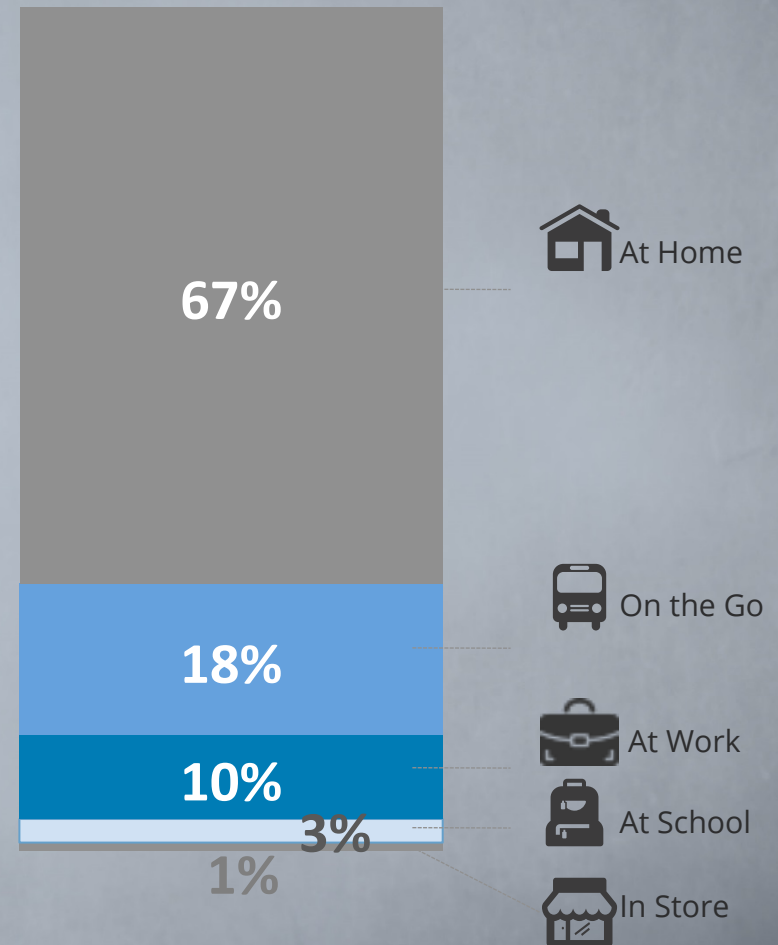
WE LIVE IN A CROSS-SCREEN WORLD

MOBILE SEARCH IS ALWAYS ON

80%

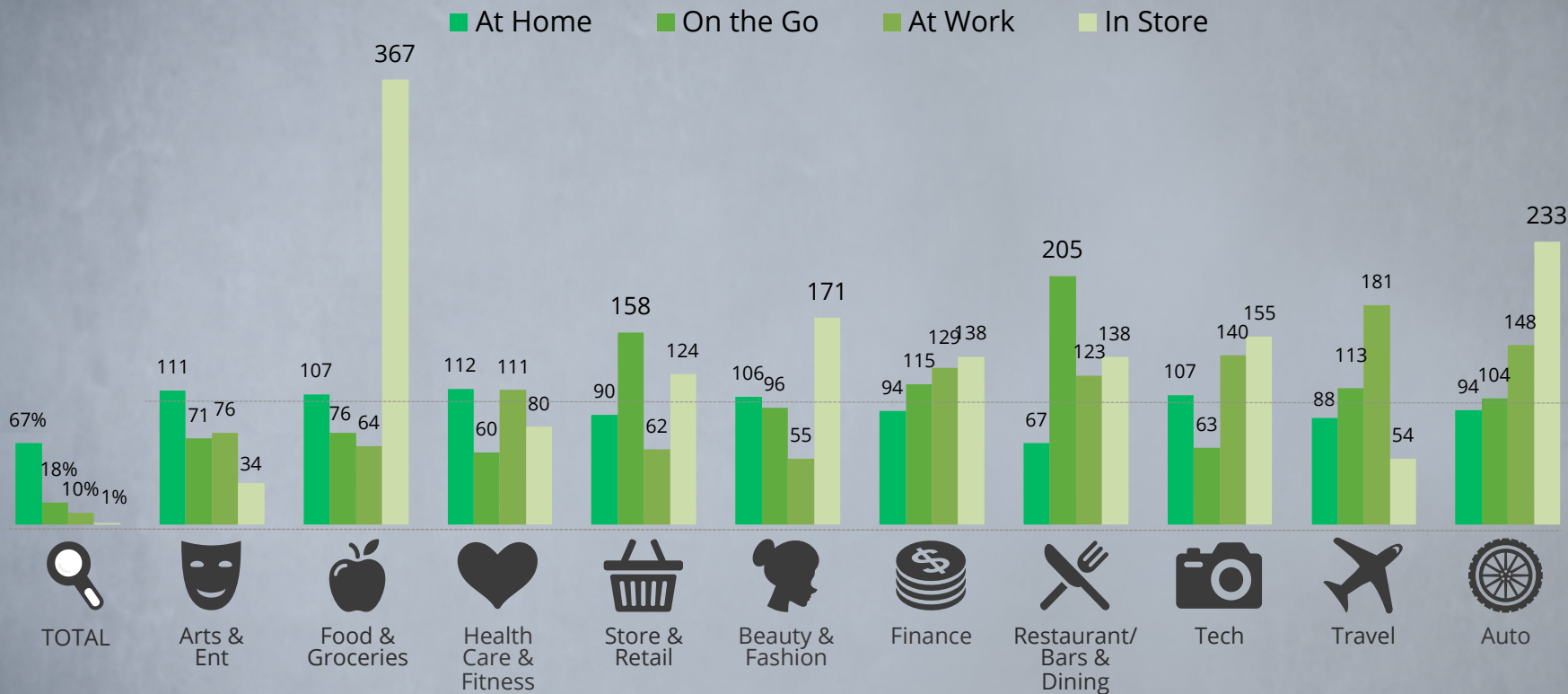


OF MOBILE SEARCHES HAPPENED
WHERE A **COMPUTER IS AVAILABLE**

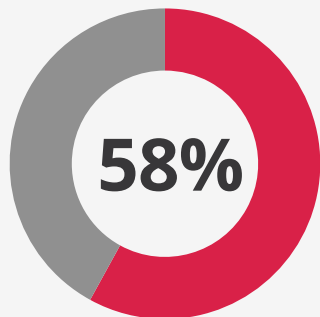


CATEGORIES OF MOBILE SEARCH VARY BASED ON LOCATION

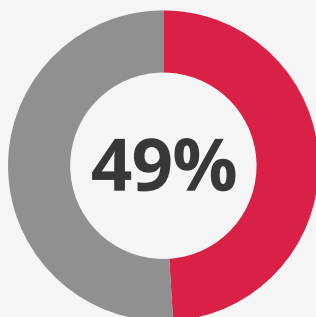
Index of Different Mobile Searches by Context



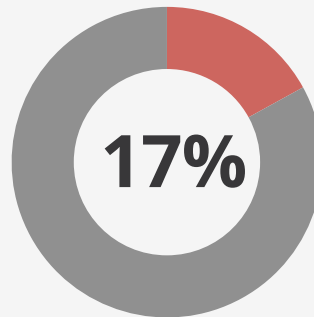
MOBILE SEARCH IS FAST & CONVENIENT



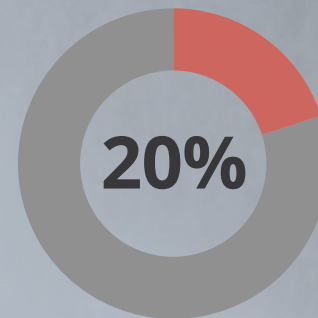
Most convenient way to search



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.

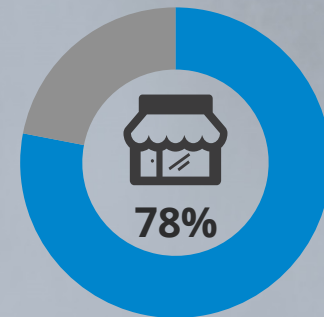
"I already had my phone in hand"

"Somebody texted me a link"

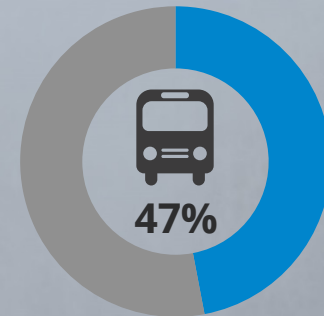
MOBILE SEARCHES HAVE PURPOSE



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

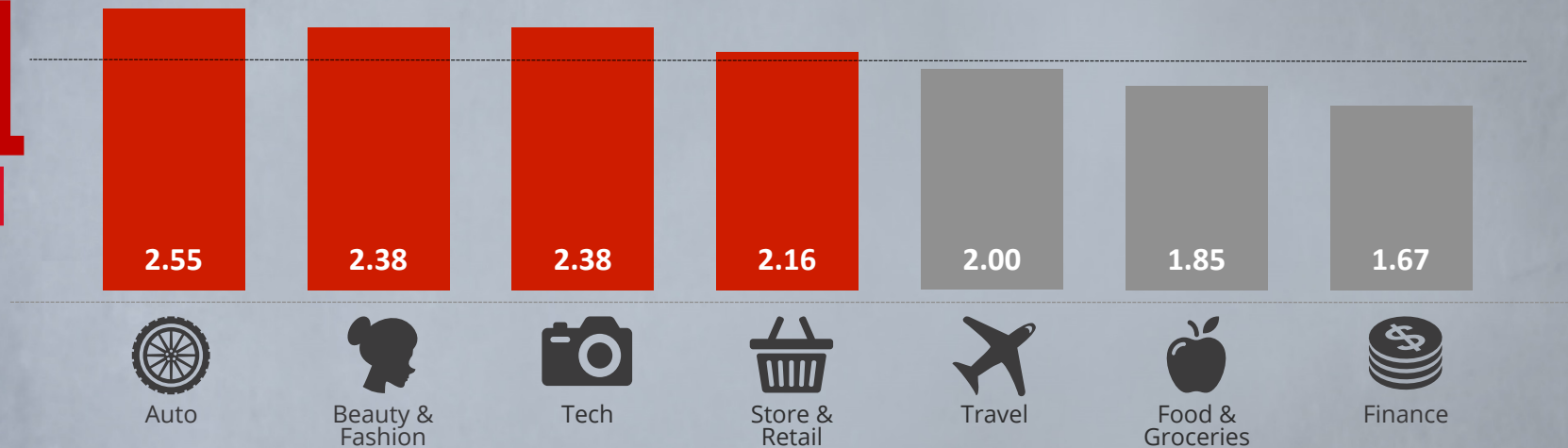
ACTIONS
PER **MOBILE SEARCH**



SOME CATEGORIES TRIGGER MORE FOLLOW-UP ACTIONS

Average number of follow-up actions per mobile search

2.1
Total



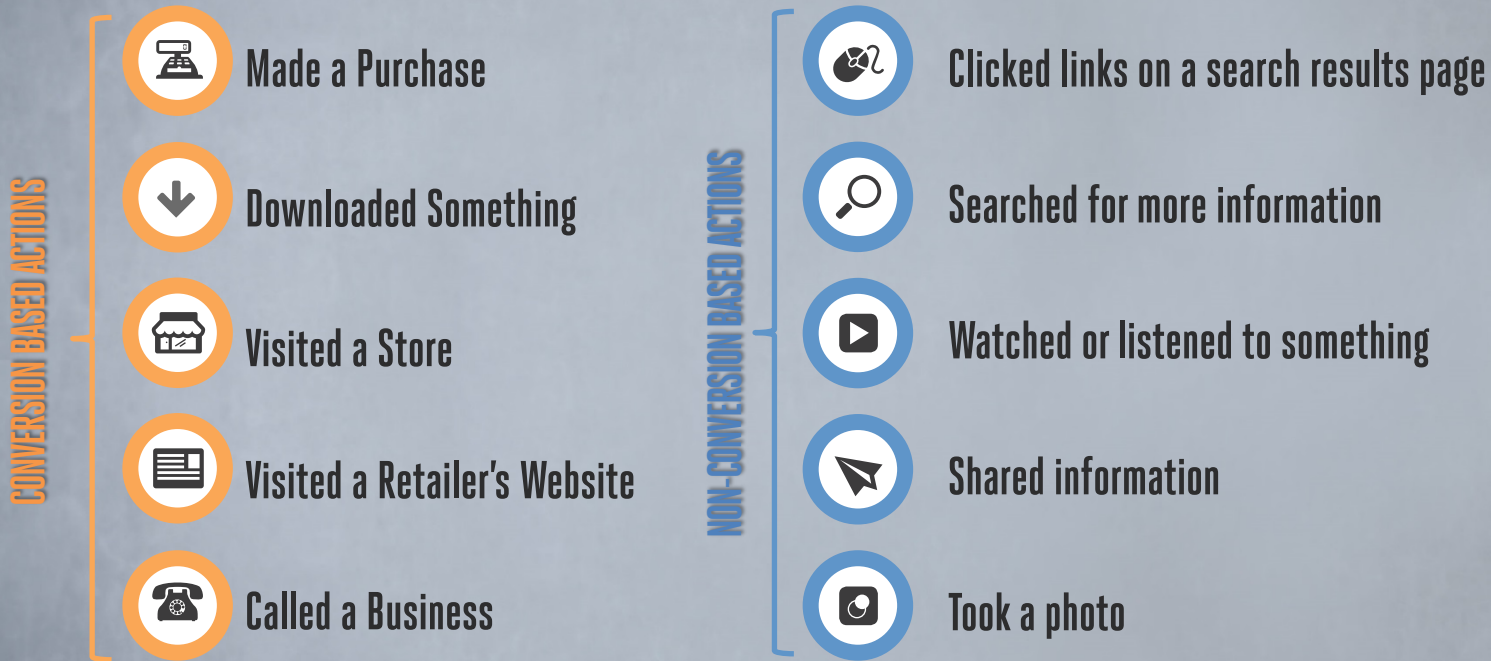
Source: Google Canada Nielsen Mobile Search Moments 2015. Base: Outcome survey completes n=973

Q2: What category of information did you search for? 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)

Note: All categories searches noted above were eligible for a follow-up survey.

POST SEARCH ACTIONS TAKEN

77% ARE A MIX OF EITHER **CONVERSION** OR **NON-CONVERSION** ACTIVITIES



Deep Dive Categories:



Food & Groceries



Store & Retail



Beauty & Fashion



Finance



Tech



Travel



Auto

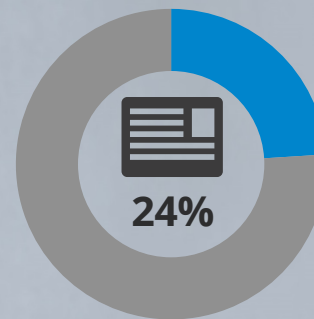
MOBILE SEARCH DRIVES VALUABLE OUTCOMES



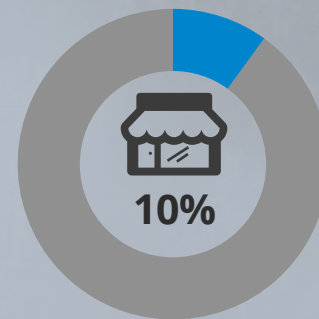
37%

OF MOBILE SEARCHES RESULT IN CONVERSIONS

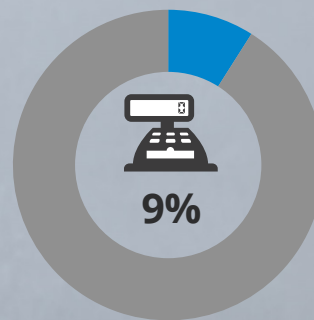
(store/website visit, call, purchase, download)



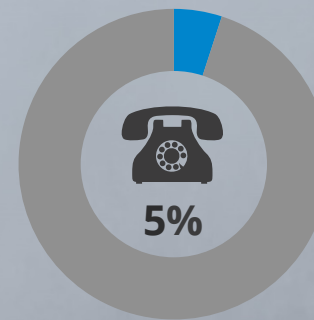
Visited a Retailer's Website



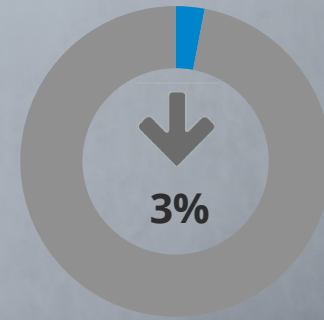
Visited a Store



Made a Purchase



Called a Business



Downloaded Something

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

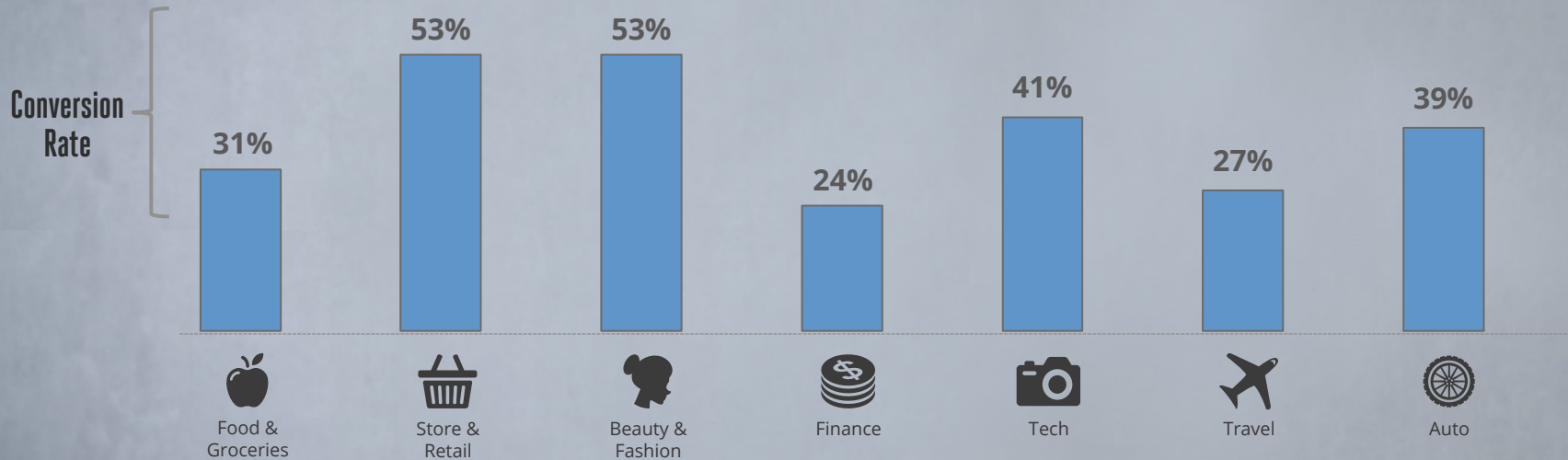
QT3A: What specifically did you proceed to do after your initial search using your smartphone?

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)

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

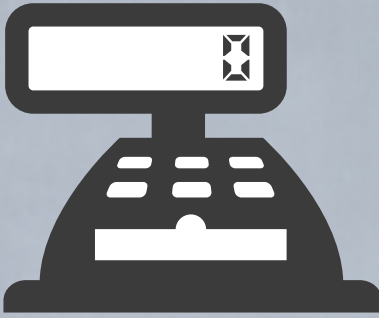
RETAIL, BEAUTY & FASHION REGISTER HIGH CONVERSION RATES



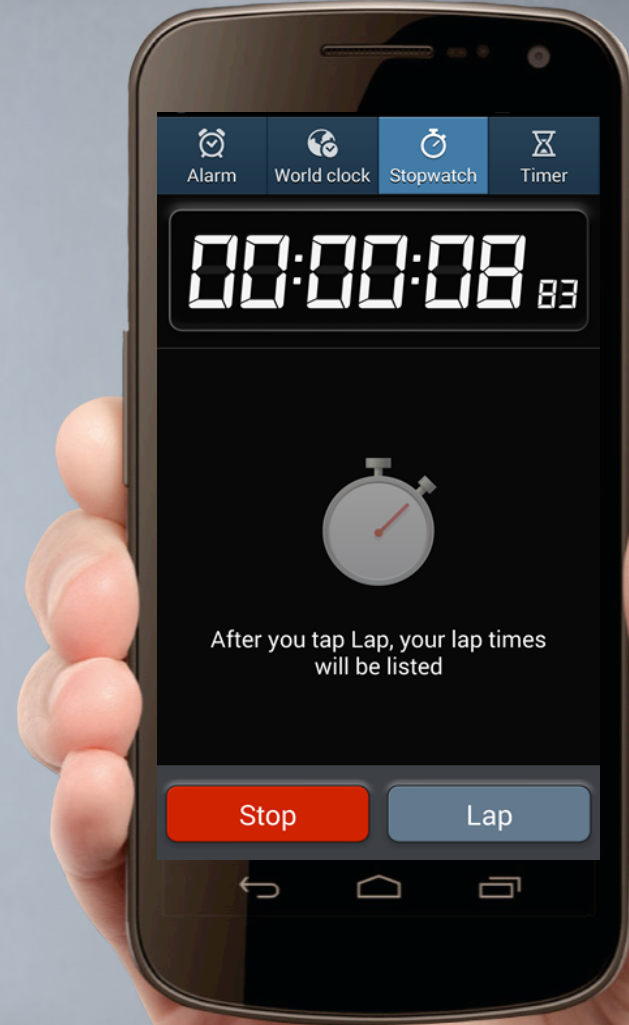
A man with short brown hair and black-rimmed glasses is looking down at a silver smartphone he is holding in his right hand. He is wearing a light blue V-neck sweater over a white collared shirt. The background is a plain, light grey wall.

MOBILE SEARCH DRIVES IMMEDIATE BEHAVIOUR

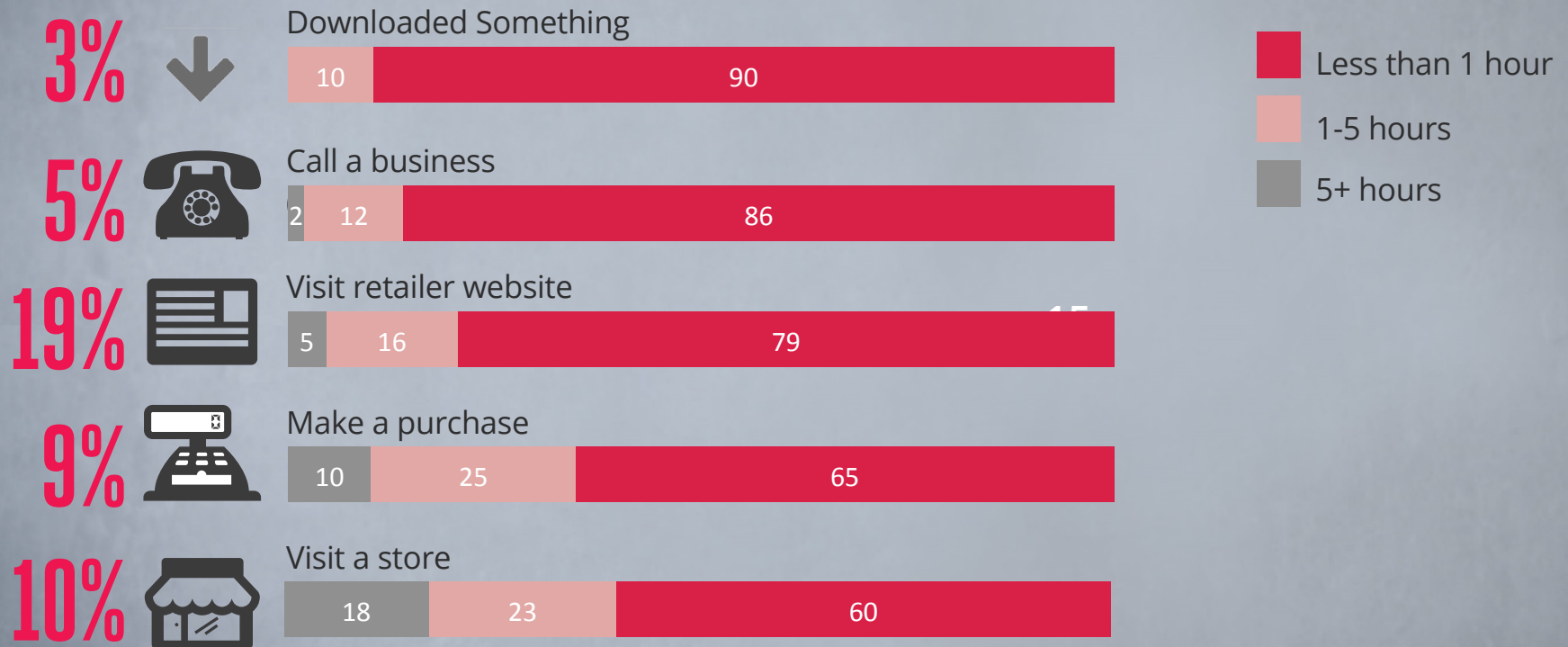
MOBILE SEARCHES TRIGGER QUICK FOLLOW-UPS

75% 

OF CONVERSIONS OCCUR
WITHIN 1 HOUR
OF THE INITIAL MOBILE SEARCH



MOBILE SEARCHES TRIGGER QUICK ONLINE AND OFFLINE ACTIONS



Source: Google Canada Nielsen Mobile Search Moments 2015.

Base: Searches that result in one type of conversion listed above,
(call a business, n=50; Download something, n=29; Visit a retailer website, n=238; Made a purchase,
n=89; Visited a business/store, n=97)

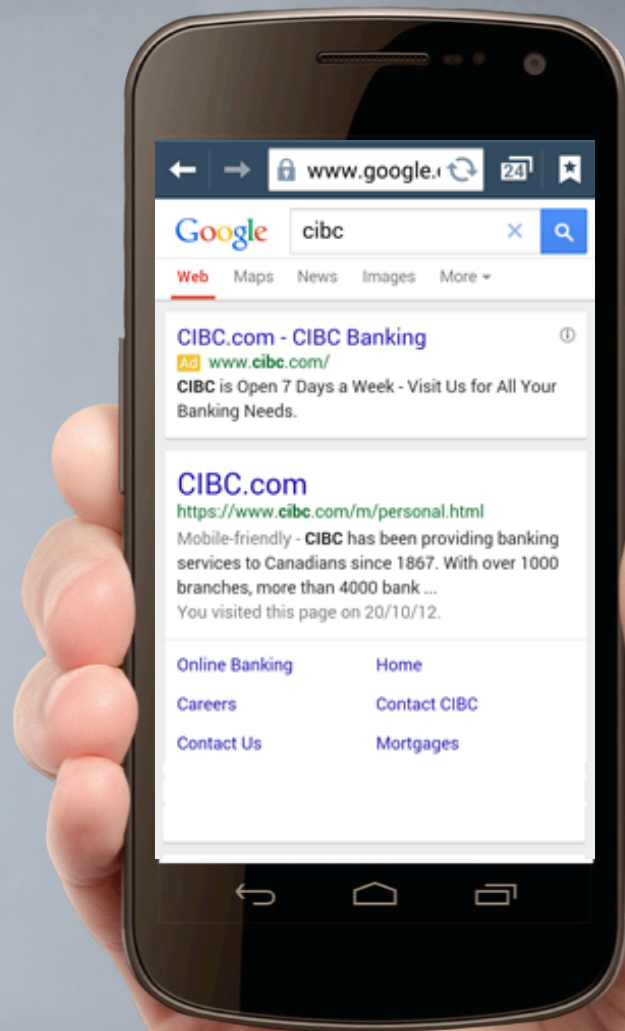
QT4: How long after your initial search on your smartphone did you start your additional activities...?

PERCEPTIONS OF MOBILE SEARCH ADS



62%

OF RESPONDENTS
NOTICED  ADS
DURING THE STUDY



MOBILE SEARCH GENERATES RECALL

1/5

SEARCHES
RESULTED IN AD
RECALL...

THE CATEGORIES THAT WERE MOST NOTICED WERE:

23%



Auto

23%



Beauty & Fashion

24%



Tech

51% OF ADS SEEN HAD
BRAND RECALL

THE CATEGORIES THAT WERE
MOST NOTICED WERE:



Auto



Beauty & Fashion

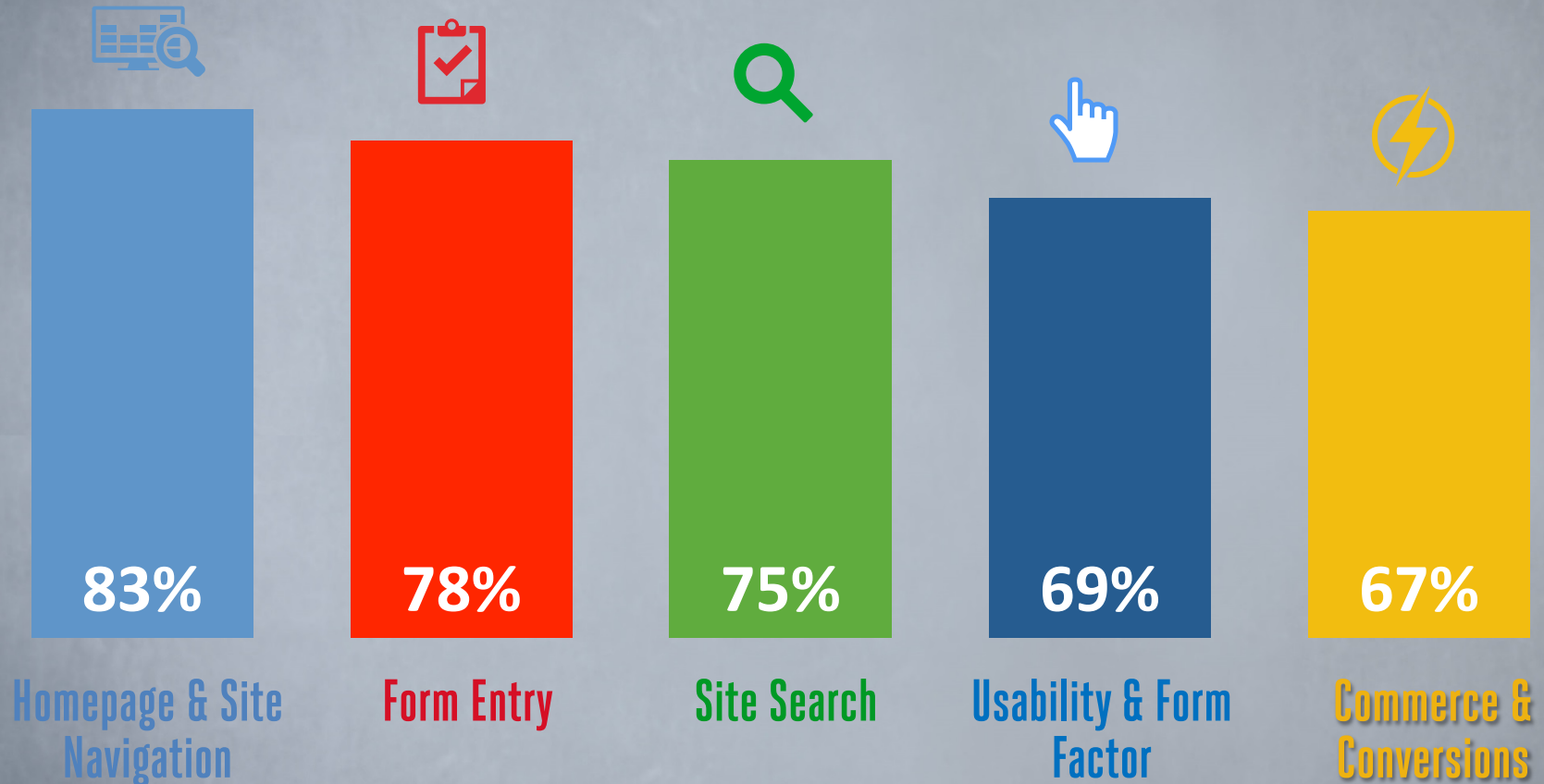


Tech

MOBILE UX EXPECTATIONS



25 Principles of Mobile Site Design



25 Principles of Mobile Site Design



Homepage & Site Navigation

- ❑ Calls-to-action are front and center
- ❑ **Menus are short and sweet**
- ❑ **Easy to get back to the homepage**
- ❑ Promotions don't steal the show

**% Extremely/
Very Important**

82%
86%
86%
79%

**Category
Average**

83%



Site Search

- ❑ Site search is visible
- ❑ **Site search results are relevant**
- ❑ Use filters to improve search results
- ❑ Guides users to better search results

84%
89%
73%
52%

75%



Commerce & Conversions

- ❑ **Users can explore before committing**
- ❑ Users can purchase as a guest
- ❑ Existing information is used
- ❑ Click-to-call is present for complex tasks
- ❑ Easy to finish converting on another device

89%
62%
58%
62%
62%

67%



Form Entry

- ❑ **Info entry is streamlined**
- ❑ Uses toggles/dropdowns to simplify input
- ❑ Visual calendars used for date selection
- ❑ Minimize errors with labeling and real-time validation
- ❑ Form design is efficient

89%
75%
72%
70%
85%

78%



Usability & Form Factor

- ❑ **Entire site is optimized for mobile**
- ❑ Don't need to pinch + zoom
- ❑ Product images are expendable
- ❑ Shoppers are told which screen orientation works best
- ❑ Users aren't brought to new browser windows
- ❑ Site avoids "full site" labeling
- ❑ 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.
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.

ONE MORE TIME...

The **MOBILE SEARCH TRIFECTA**: Key to seizing the mobile conversion

MOBILE SEARCH IN CANADA IS...





MOBILE SEARCH

CREATING MOMENTS THAT MATTER

Contact your Google rep to prepare your
brand to win these moments

If you don't have a Google rep, please call
1-844-245-2558 to get started.

