



Mobile Search Moments

Understanding How Mobile Search Drives Conversions In Singapore

December 2014



Research objectives

This study was conducted to provide insights into mobile search behavior. In particular, the focus of the study was on the extent to which mobile search leads to conversions in different categories.



Understanding
Mobile Search



Actions and conversions
triggered by mobile



Perceptions of
Mobile Ads



Research Design

Target group: Individuals aged 18+ in Singapore who search using their mobile devices at least 3 times a week

Fieldwork period: July to August 2014

Project and fieldwork management: Intuit Research



Methodology and sample sizes:



Summary of Findings

Mobile search is always-on

76% of mobile searches happen at home or work.

17% are on the go

4% in a store or restaurant

Mobile search helps decision making

53% of mobile searches are done to help with a decision on buying a product or service.



Mobile search triggers actions

84% of mobile searches lead to further actions, e.g. looking for more information, visiting a store or website and purchasing a product or service

Mobile ads drive conversions

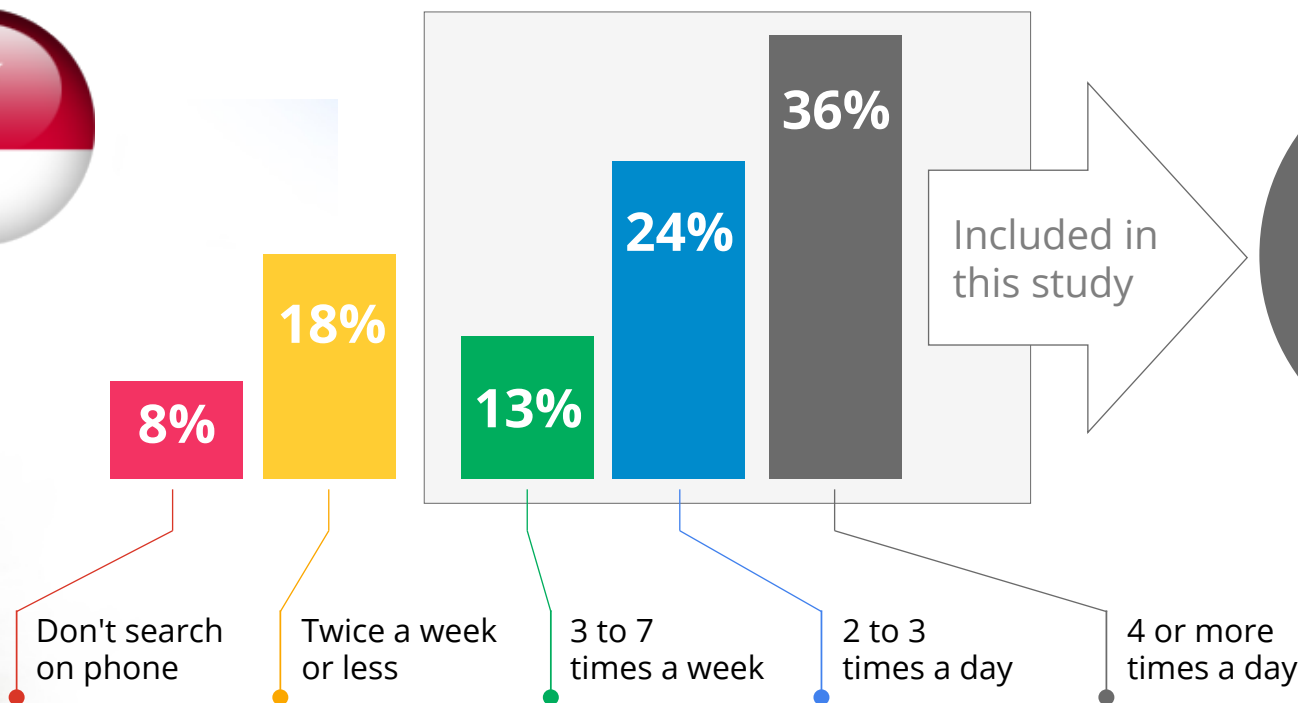
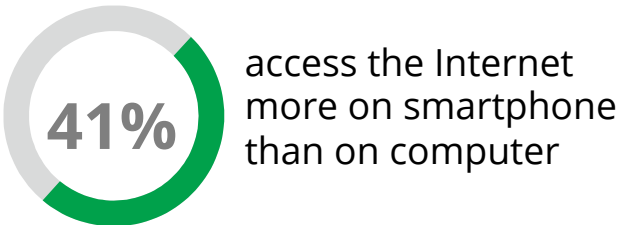
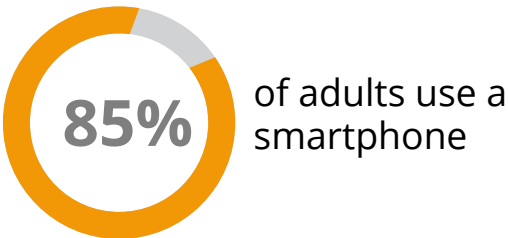
Consumers who click on an ad are **twice** as likely to buy something

Understanding Mobile Search



Mobile Search In Singapore – The Context

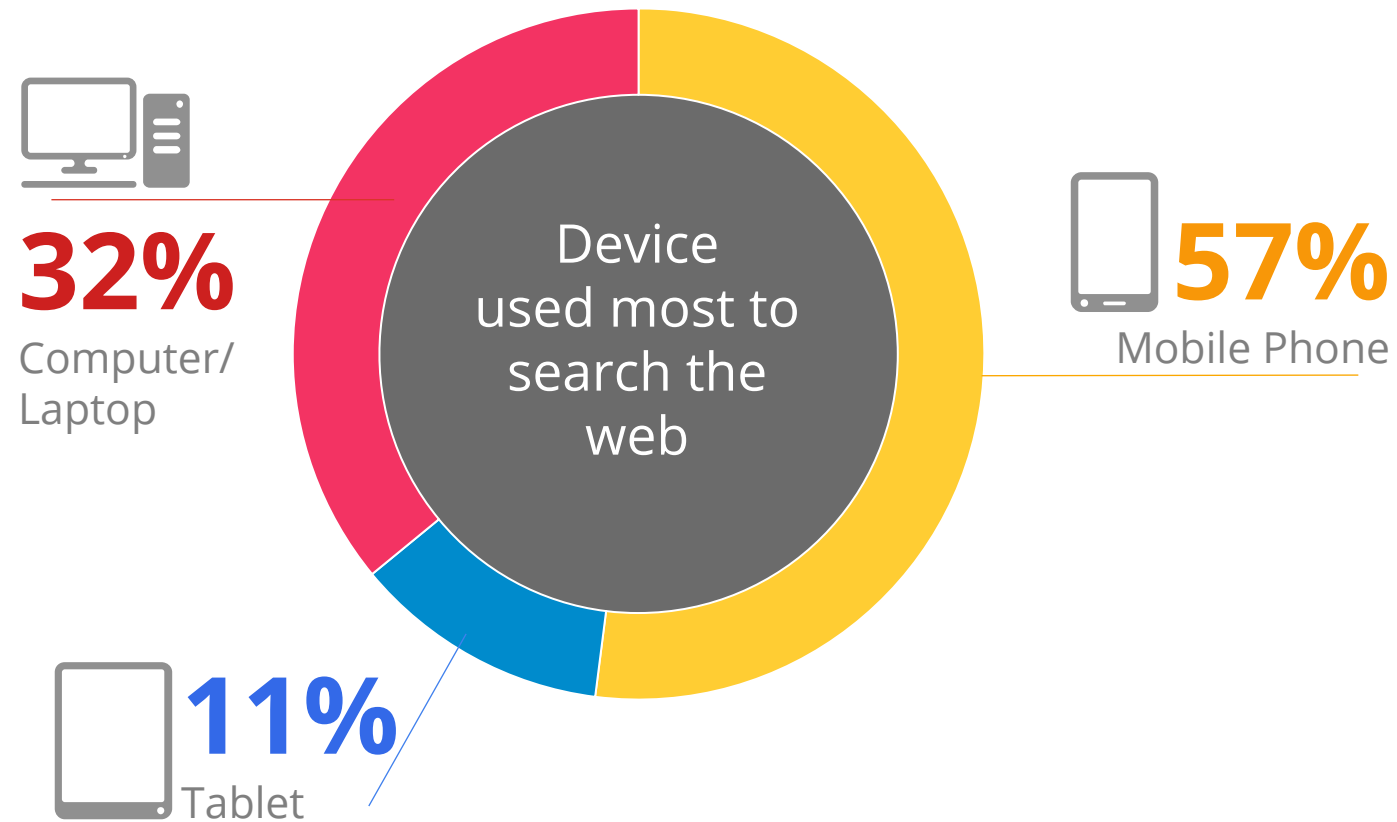
7.99m
3G/4G
Subscriptions



2.9
searches a day
on average

Sources: Google Connected Consumer Study 2014, Infocomm Development Authority of Singapore & Google/Intuit Research Mobile Search Moments Study 2014. Base: Total respondents n=458.
Q S1. Do you use your mobile phone to conduct internet searches? If so, how often?

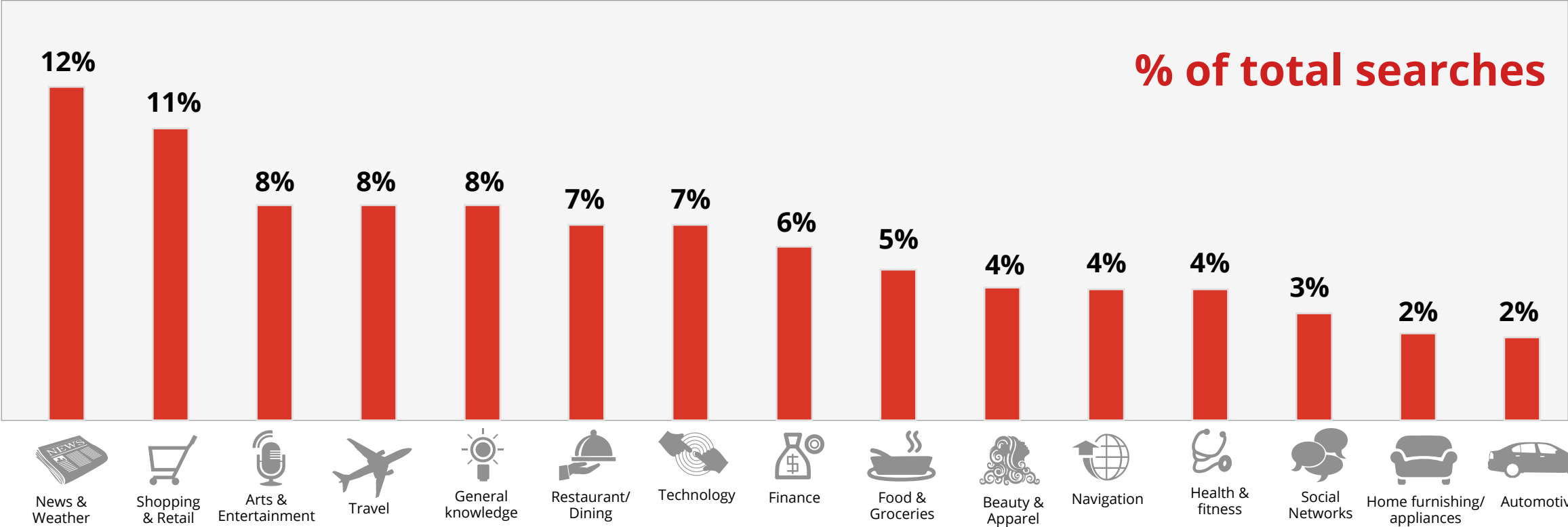
Mobile is the device most used for search



Source: Google/Intuit Research Mobile Search Moments Study 2014.
Base: Total respondents n=458.
Q E3, Which device do you use most often to search the internet?

Mobile users search for a variety of information

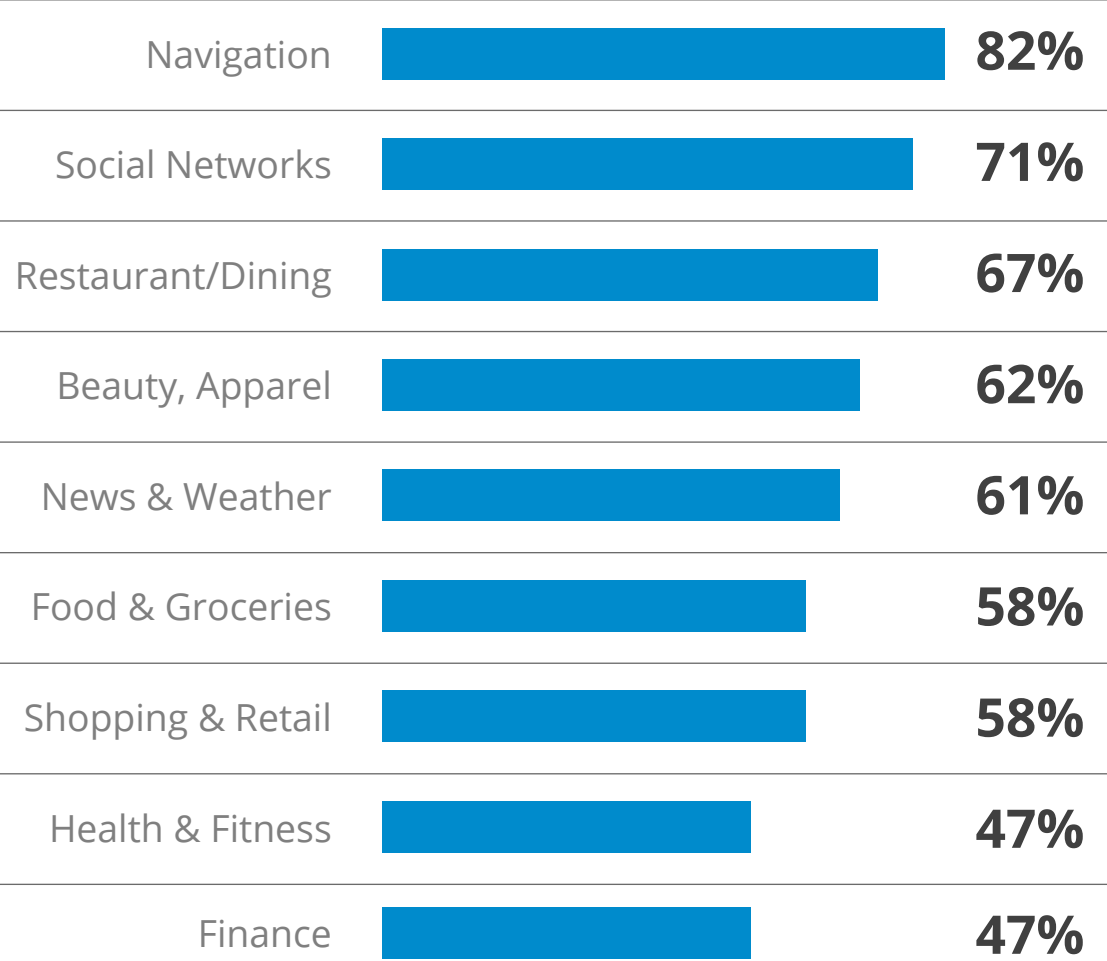
	Total	Weekdays	Weekends
Average daily searches	2.9	3.0	2.8



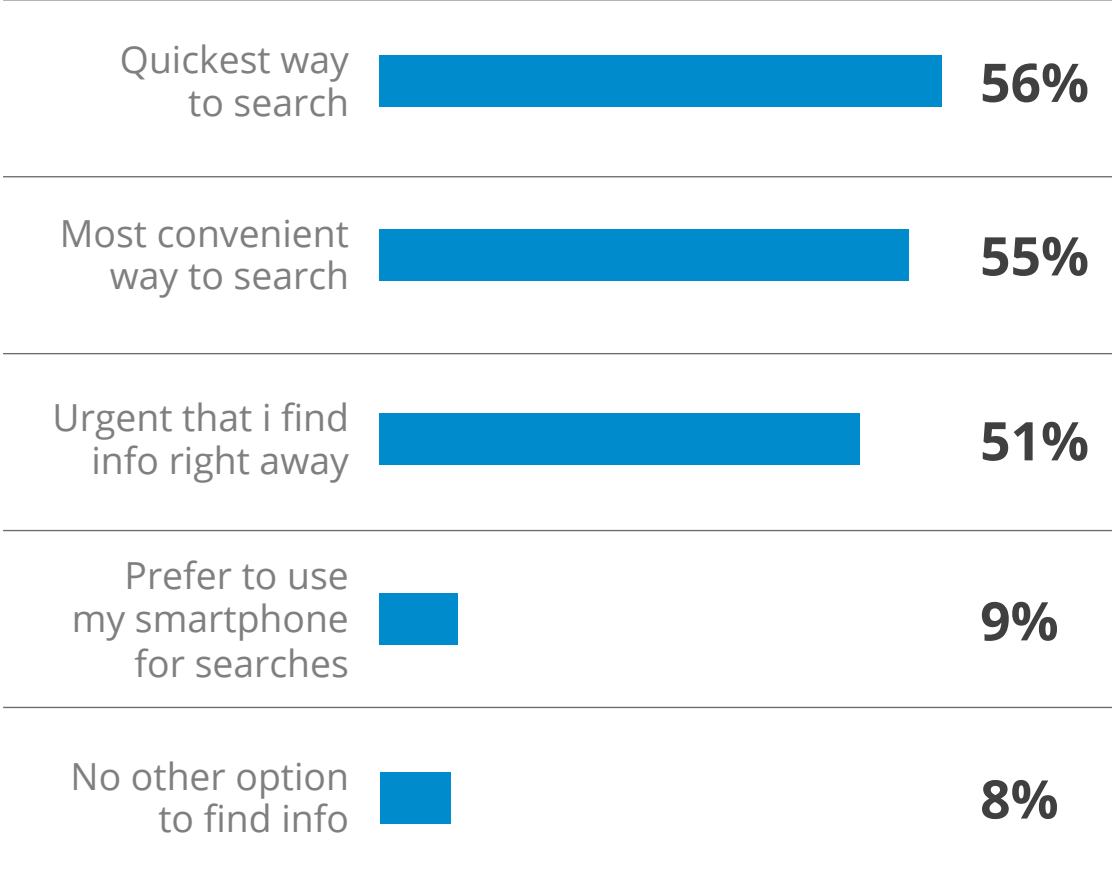
Source: Google/Intuit Research Mobile Search Moments Study 2014. Base: Total mobile searches n= 8,815.
Q D2: What category of information did you search for?

Mobile most used for search across categories due to speed and convenience

% Use mobile phone most to search

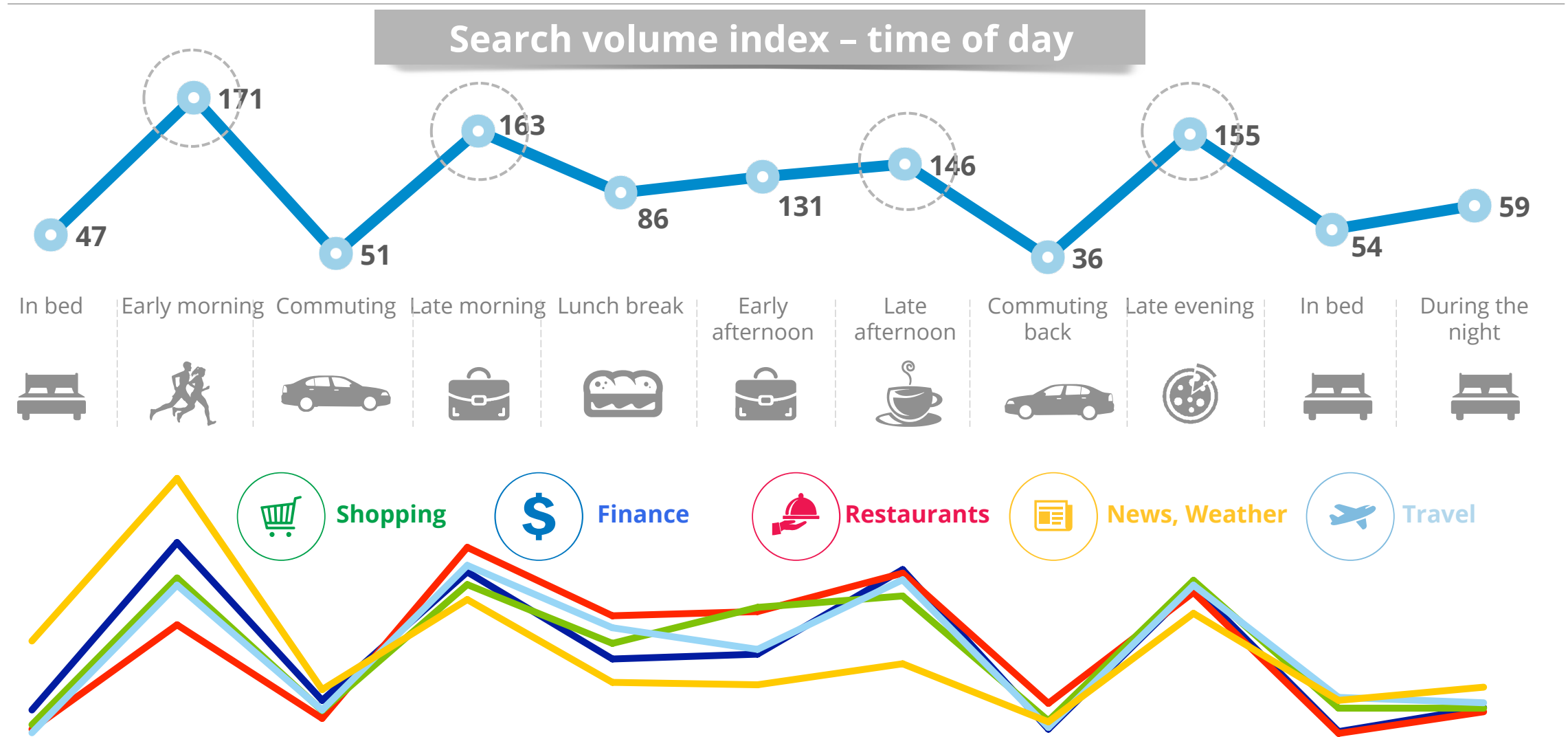


Why use mobile for search?



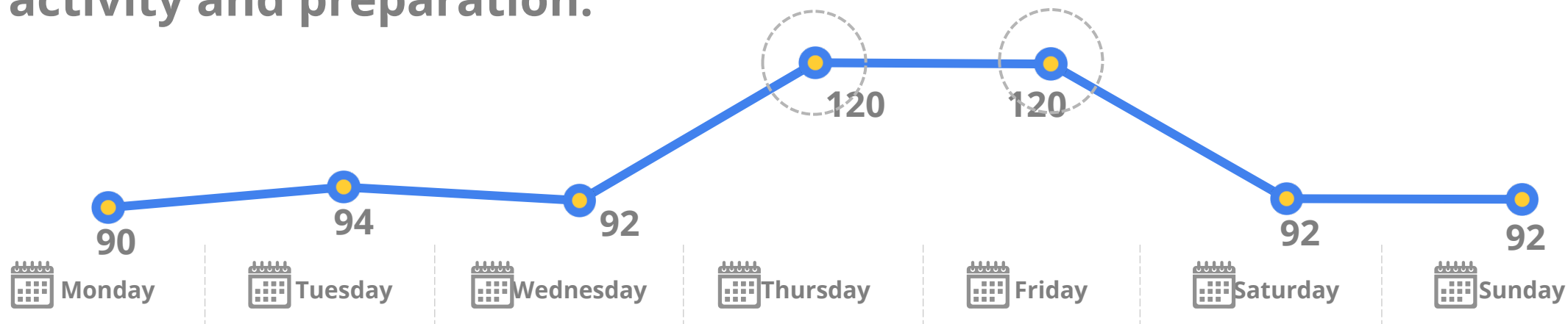
Source: Google/Intuit Research Mobile Search Moments Study 2014. Base: Total respondents n=458.
Q E7: When you are searching for information in each of the following categories, which device do you use most often?
E9: Why do you use your mobile phone to search for information?

Mobile search happens throughout the day, with peaks in the early and late mornings and late evenings

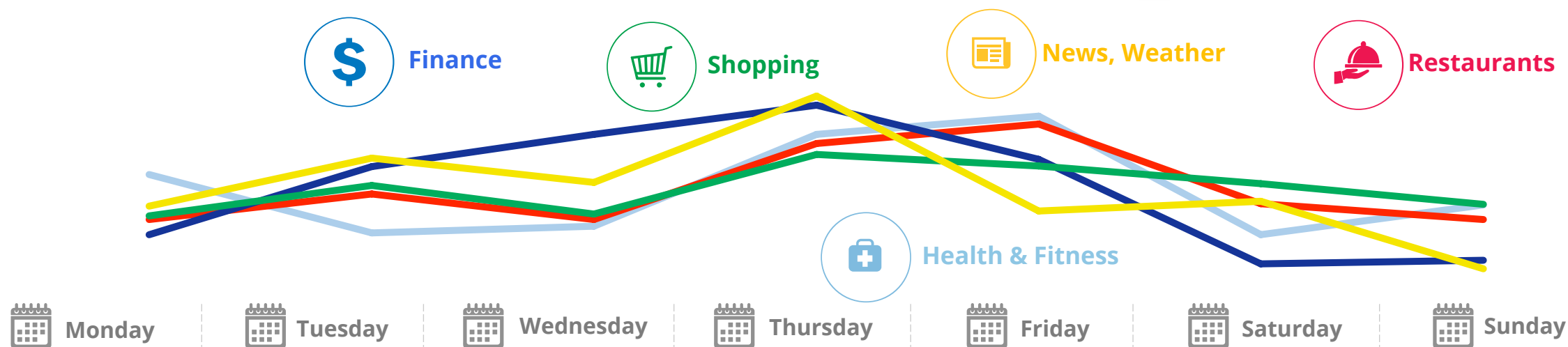


Source: Google/Intuit Research Mobile Search Moments Study 2014. Base: Total mobile searches n= 8,815. Q D2: What category of information did you search for?

Significantly more searches on Thu and Fri, mainly driven by weekend activity and preparation.

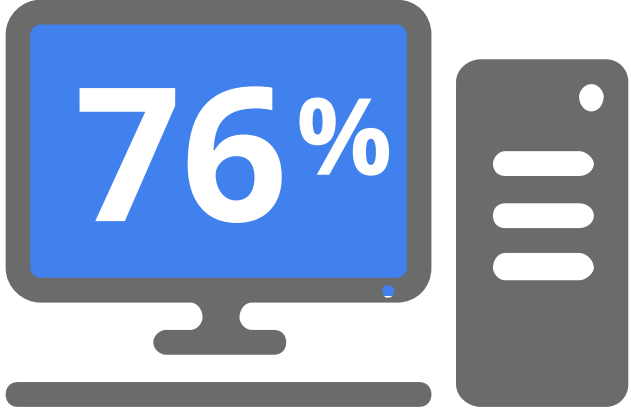
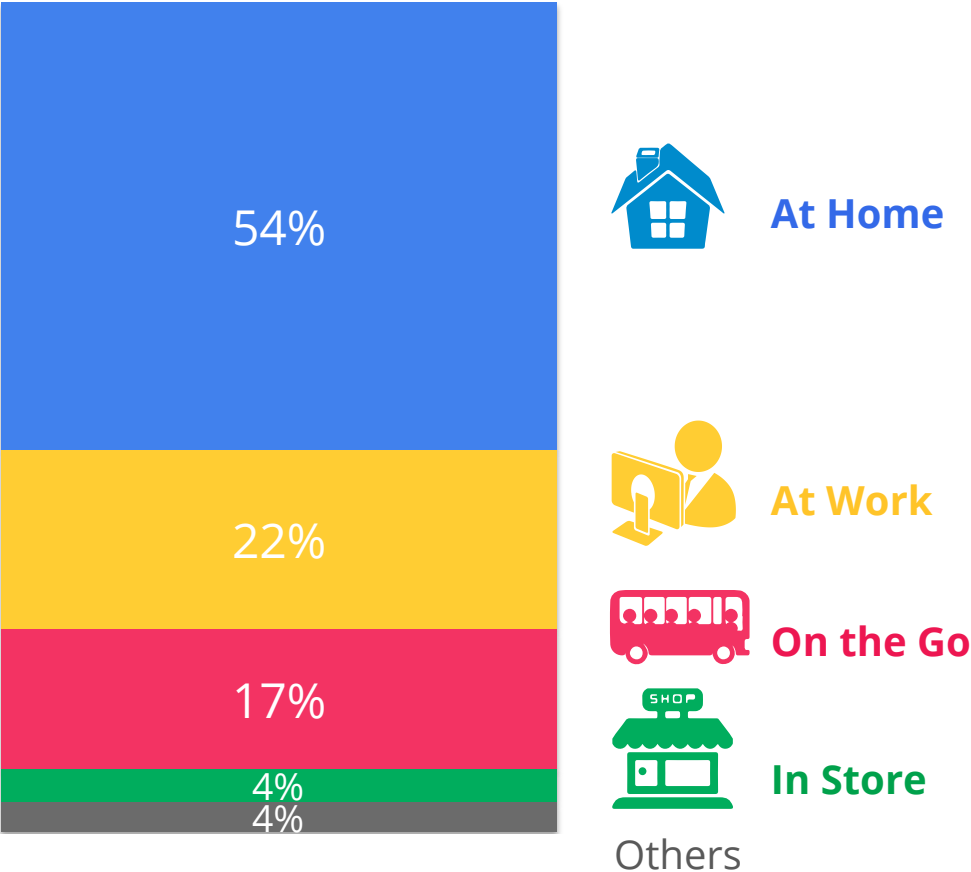


Search volume index - Day of week



Source: Google/Intuit Research Mobile Search Moments Study 2014. Base: Total mobile searches n= 8,815. Q D2: What category of information did you search for?

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



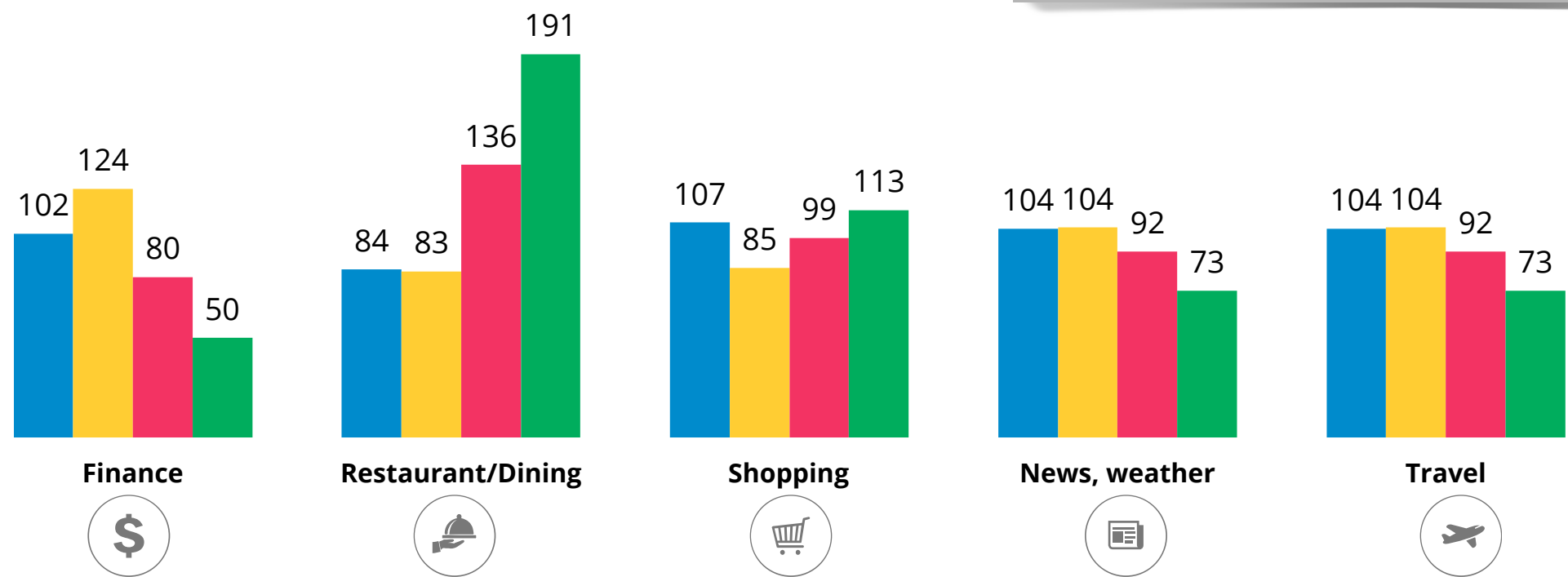
of searches happen at home or work, where they are likely to have a PC available to them

Source: Google/Intuit Research Mobile Search Moments Study 2014. Base: Total mobile searches n= 8,815.
Q D3: Where were you when you did the search?

Search location varies by information sought



Search volume index - by location

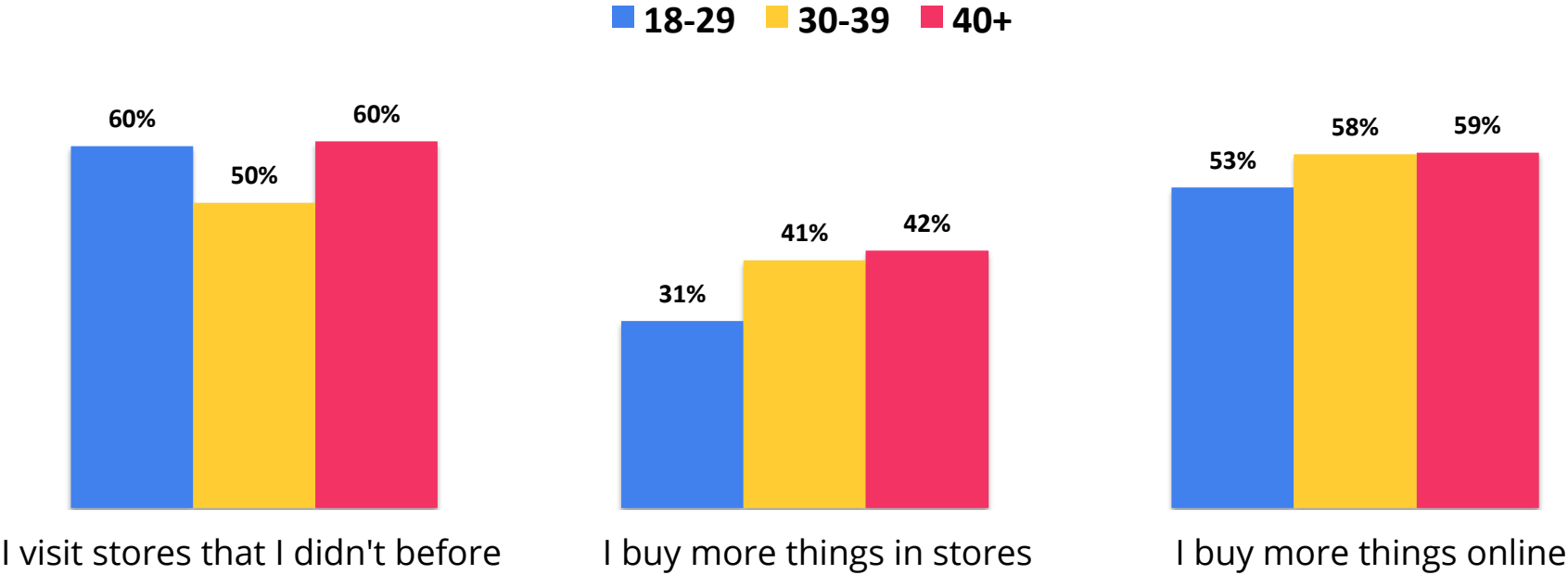


Source: Google/Intuit Research Mobile Search Moments Study 2014. Base: Total mobile searches n= 8,815.
Q D3: Where were you when you did the search?

Mobile Search Drives Conversions



Consumers recognise that mobile search has impacted their shopping behavior, especially for among mid to older age consumers



...because of mobile searches

Source: Google/Intuit Research Mobile Search Moments Study 2014.
Base: . Base: Total respondents n=458.
Q E11: With relation to your overall shopping for products and services, how much do you agree with each of the below statements?

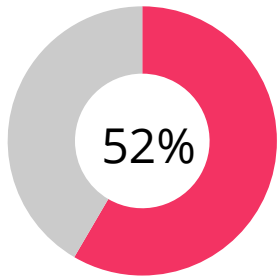
84% of mobile searches lead to further actions, in exploring further, but also driving online and physical purchases

Took action after search?

Yes 84%

No 16%

Visited store or website



52%

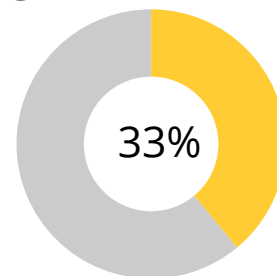
42%

Visited a website

12%

Visited a store physically

Sought more information



33%

13%

Research on computer

11%

Research on phone or tablet

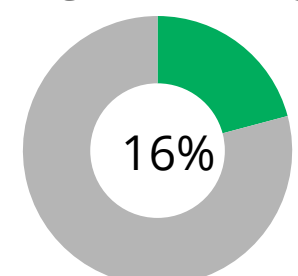
5%

Sought info face-to-face

4%

Sought info via social media

Bought something



16%

5%

Bought something in a store

3%

Went to a restaurant or bar or cafe

3%

Bought something on a computer

3%

Ordered food

3%

Bought something on my smartphone

3%

Went to a service location

2%

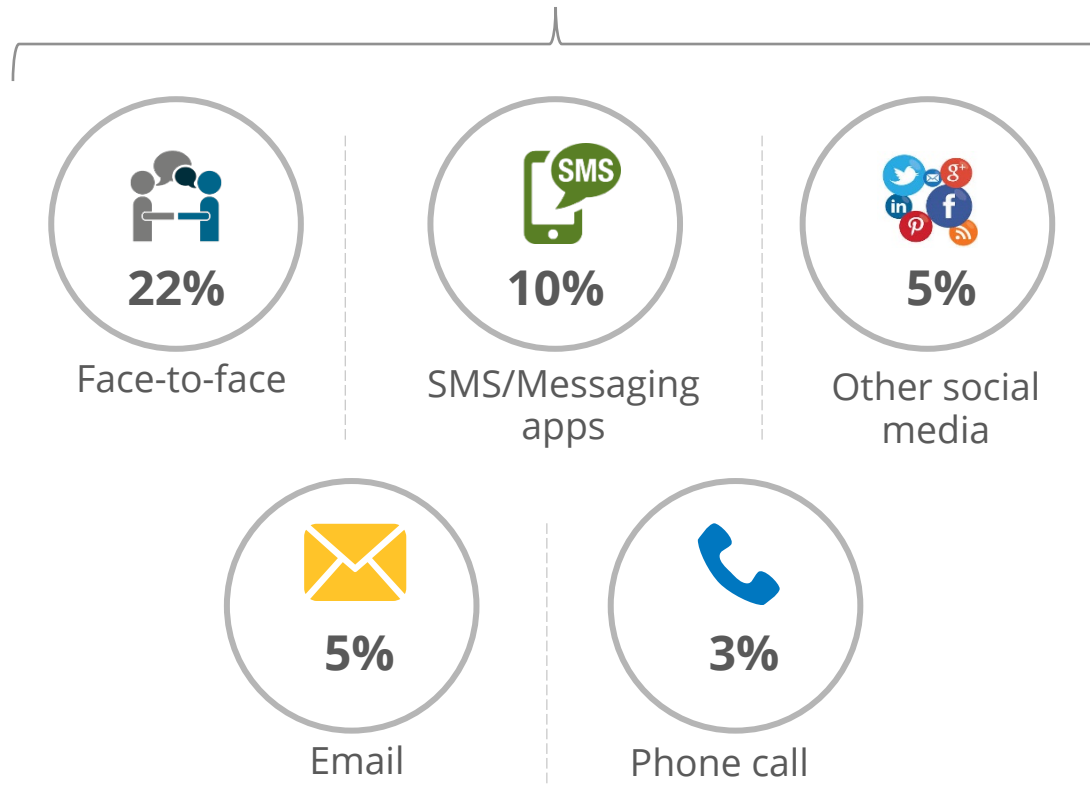
Bought something on a tablet

In 38% of all searches, consumers shared the information with someone, the majority of the time face-to-face

Shared info after search?

Yes 38%

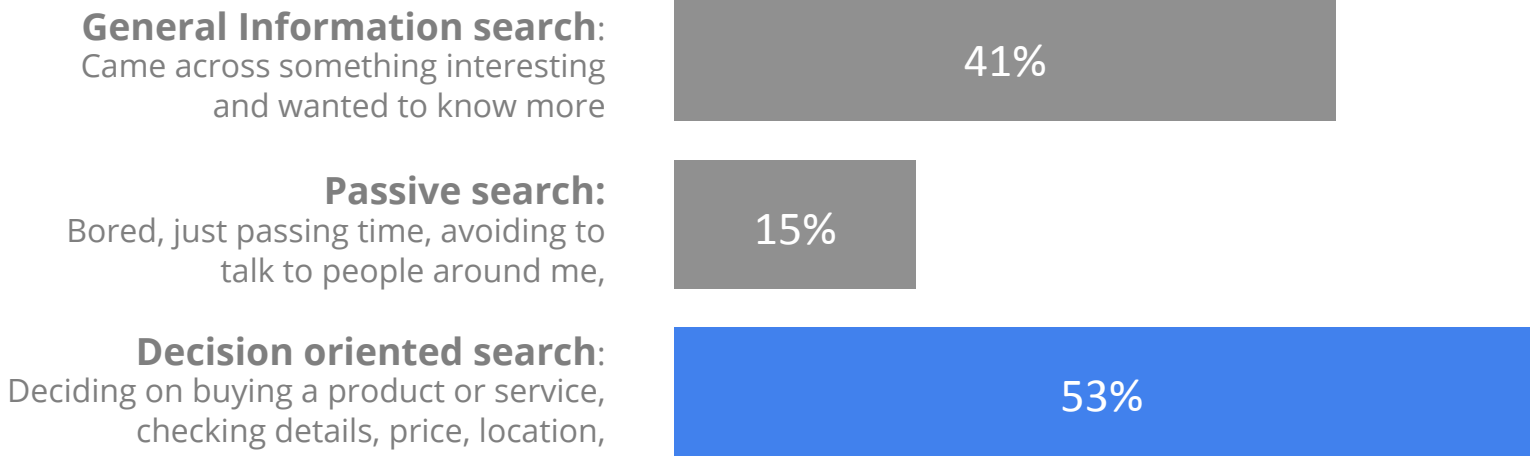
No 62%



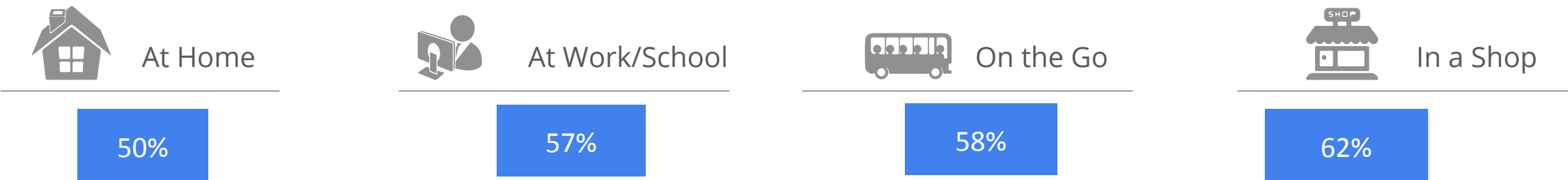
Source: Google/Intuit Research Mobile Search Moments Study 2014. Base: Total follow-up surveys n= 6,904. Q F6 & 7. Did you share your search information with anyone else? How did you share the information?

Half of all mobile searches are done to help with a purchase decision, more so when out of home

Purpose of mobile search



Decision oriented search: By Location



Source: Google/Intuit Research Mobile Search Moments Study 2014. Base: Total mobile searches n= 8,815.
Q D5: Why did you conduct this search?

Decision oriented searches lead to higher conversions

112%

MORE LIKELY TO VISIT A
STORE PHYSICALLY

38%

MORE LIKELY TO BUY
SOMETHING ON A PC

70%

MORE LIKELY TO BUY
SOMETHING IN A STORE

2.75X

AS LIKELY TO GO TO A
RESTAURANT OR BAR

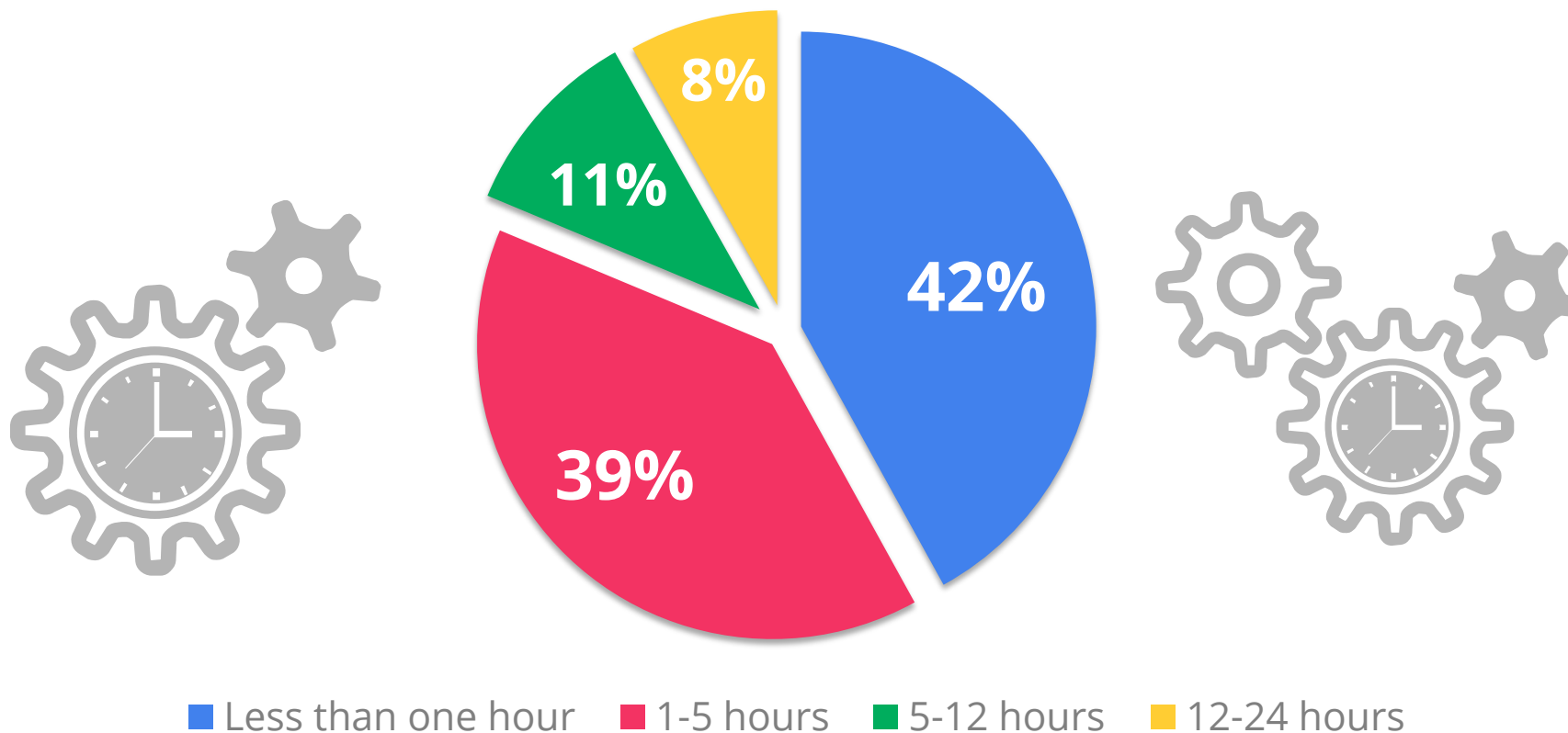
when search is
decision-oriented



Source: Google/Intuit Research Mobile Search Moments Study 2014. Base: Total follow-up surveys n= 6,904.
Q D5: Why did you conduct this search? F1. Which of the following have you done as a result of this search?

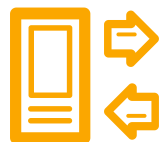
81% of purchase related conversions happen within 5 hours and 42% within an hour of the mobile search

How long after searching did you take actions?



Source: Google/Intuit Research Mobile Search Moments Study 2014. Base: Number of follow-up surveys where a purchase had happened n= 1,105.
Q F5: How long after searching did you make this purchase or use the service?

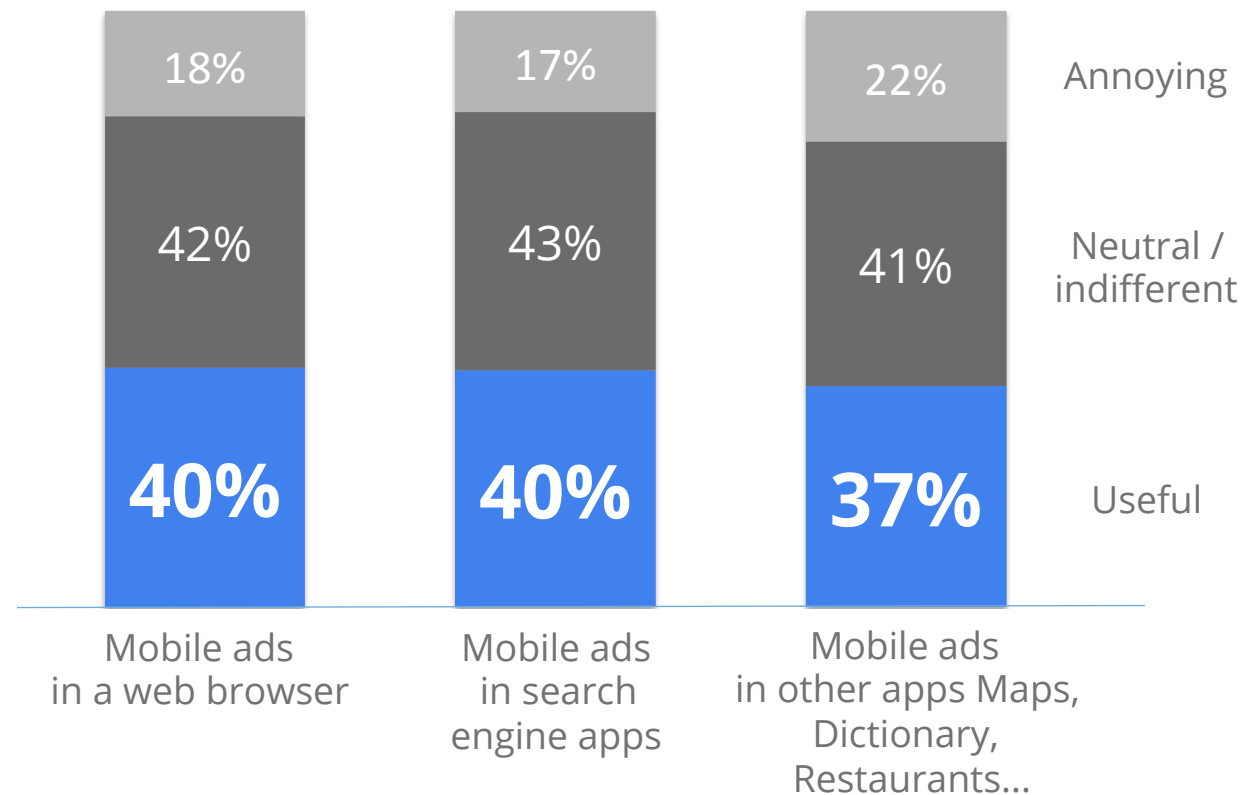
Perceptions of Mobile Ads



Two in five consumers find mobile ads useful when searching in both browsers and apps



Perception of mobile ads



Source: Google/Intuit Research Mobile Search Moments Study 2014. Base: . Base: Total respondents n=458.
Q E10: What do you think about mobile ads (sponsored results, text ads, video ads etc.) in the following when you are searching for information?



IN **38%**
OF ALL SEARCHES
DURING THE STUDY,
RESPONDENTS
NOTICED AN AD

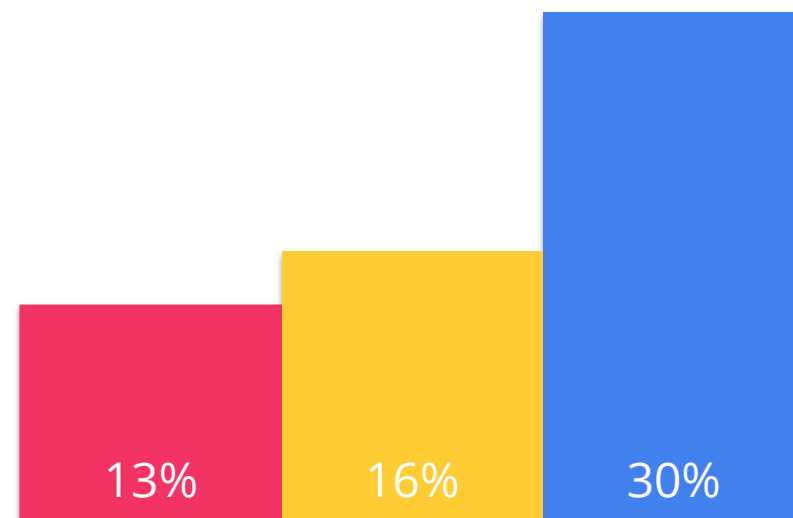
Source: Google/Intuit Research Mobile Search Moments Study 2014.
Base: Total mobile searches n= 8,815.
Q D7. Did you notice any ads during your search?



Consumers who click on an ad are twice as likely to buy something



■ Didn't see ad ■ Saw ad, didn't click ■ Clicked on ad

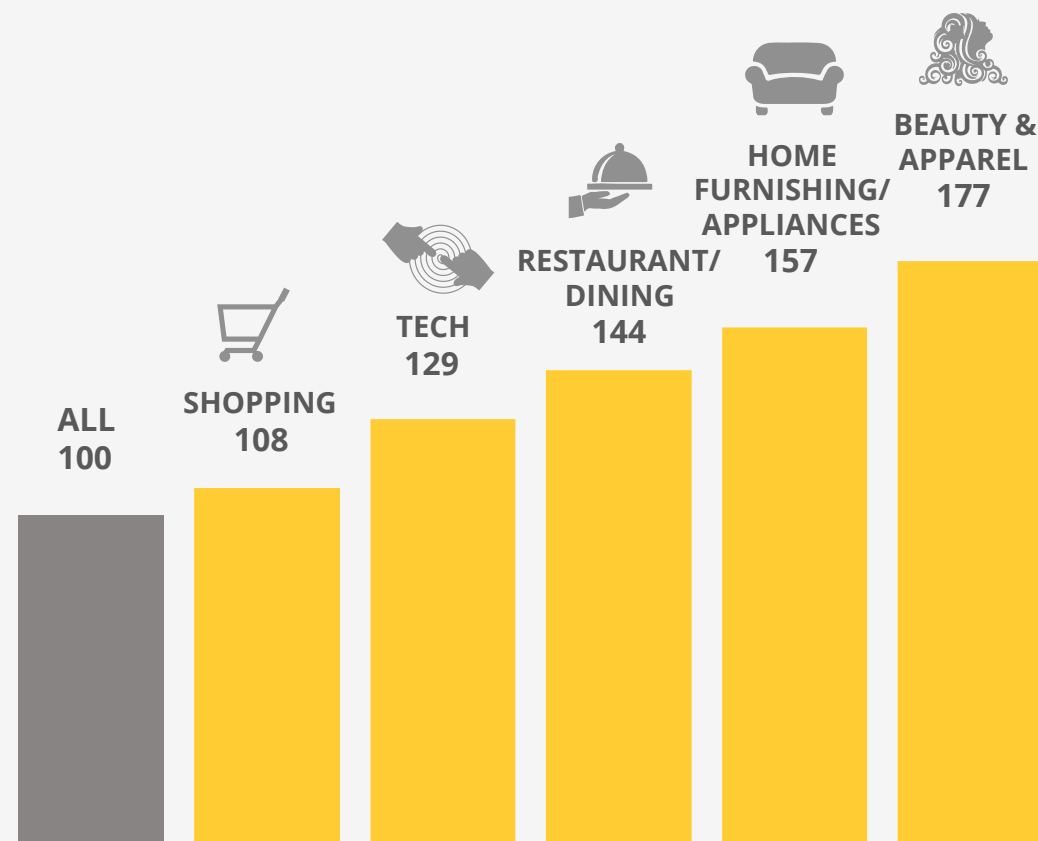
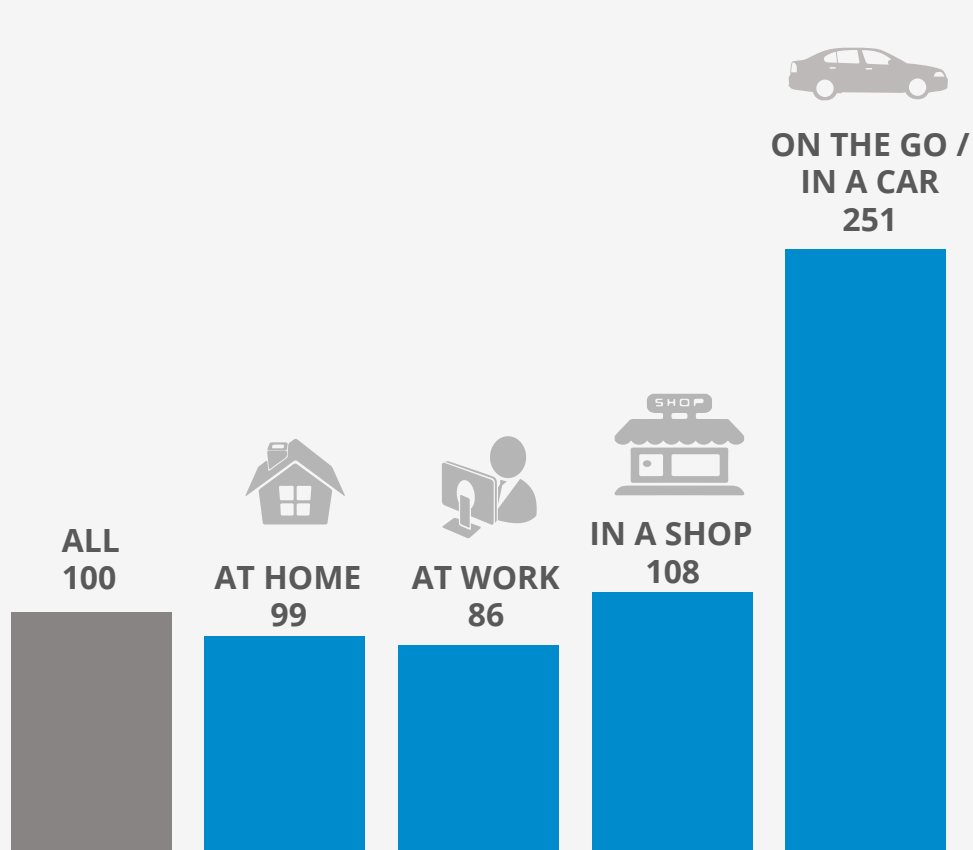


Bought something

Source: Google/Intuit Research Mobile Search Moments Study 2014. Base: Total follow-up surveys n= 6,904.
Q F2: You had mentioned seeing ads during this search. Did you click on the ad? F3. What did you do after you clicked on an ad during this search?

A purchase due to a mobile search ad is much more likely on the go and for certain categories

Index of purchases due to clicking on ads

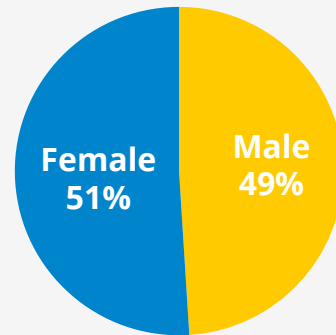


Source: Google/Intuit Research Mobile Search Moments Study 2014. Base: Number of follow-up surveys where a purchase had happened n= 1,105.
Q F3: What did you do after you clicked on an ad during this search?

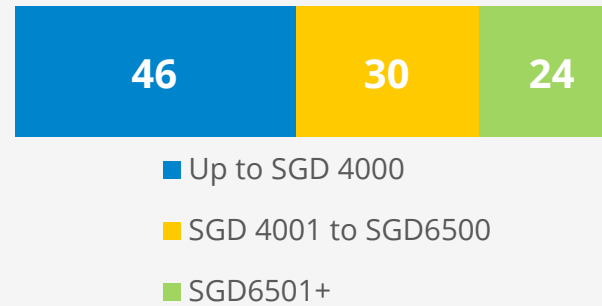
Appendix: Profile of Study Participants



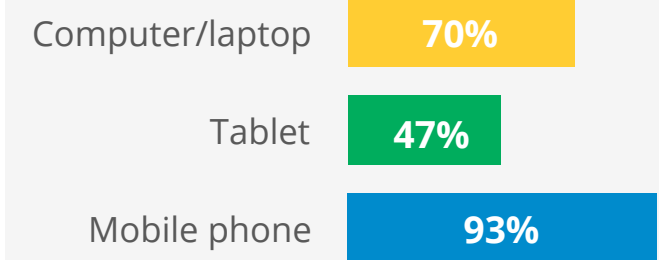
Gender



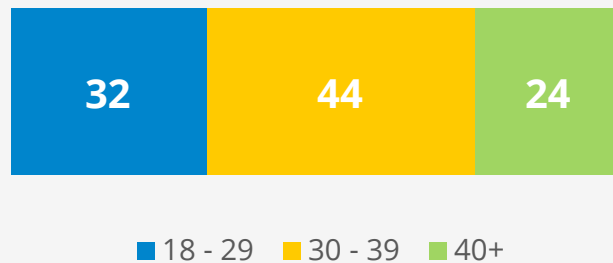
Income



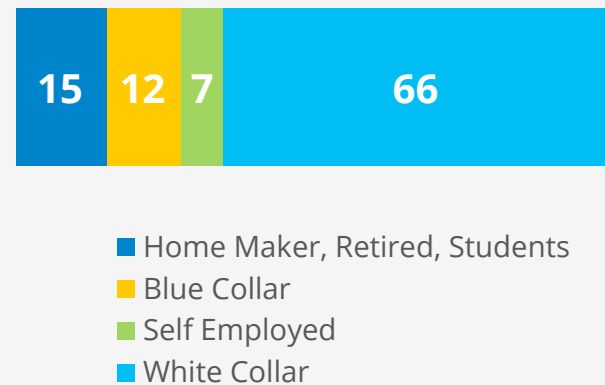
Device Ownership



Age



Occupation



Time spent on internet daily

Average Hours

For work	3.8
For Leisure	3.8
Total	7.6



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