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The Role of Search in a Customer's Mobile Experience

Understanding the Customer Journey, Research in the Mobile Sector
Google/Nielsen
UK, February – April 2010

Agenda

1 Methodology

- -

2 Results

- -

3 Key Takeaways

- -

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Source: Google/Nielsen, The Role of Search in a Customer's Mobile Experience, UK, February – April 2010
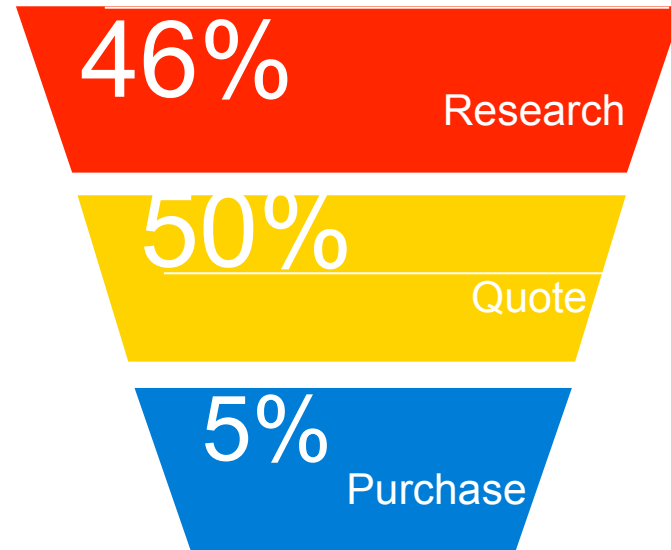
Mobile: **Methodology**

Methodology

- Custom analysis of Nielsen's NetView metered panel
- Period of analysis: February – April 2010
- Analysis based on:
  - The pre-defined NetView Category: Mobile
  - Recoded to Google classification criteria
  - Events included for approx 47 sites
  - An event can only happen once in a single site/session, this avoids double-counting occasions where a transaction involves multiple URLs
  - A start event is determined as the first mobile related activity in the period of analysis
  - Analysis restricted to Adults 16+
  - Data checked for outliers but non were removed
  - 3,404 unique search terms categorised according to Google's classification structures (Brand Only Terms, Brand with Other, Brand Product, Generic)
  - Referrals to data set are also included to identify non-search clickthroughs

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Audience actions during the research
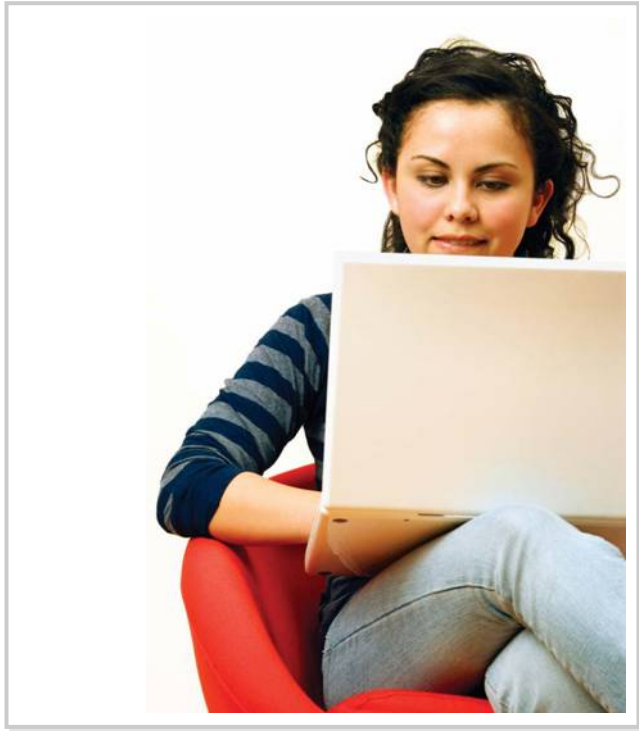
5% of those in the mobile market made a purchase and 50% got a quote

12,106,513 people were in the mobile market from February 2010 to April 2010

46% Research

50% Quote

5% Purchase

Base: All in the mobile market
Note: Type of activity in the mobile market; Figures do not add up to 100% due to rounding

Source: Google/Nielsen, The Role of Search in a Customer's Mobile Experience, UK, February – April 2010
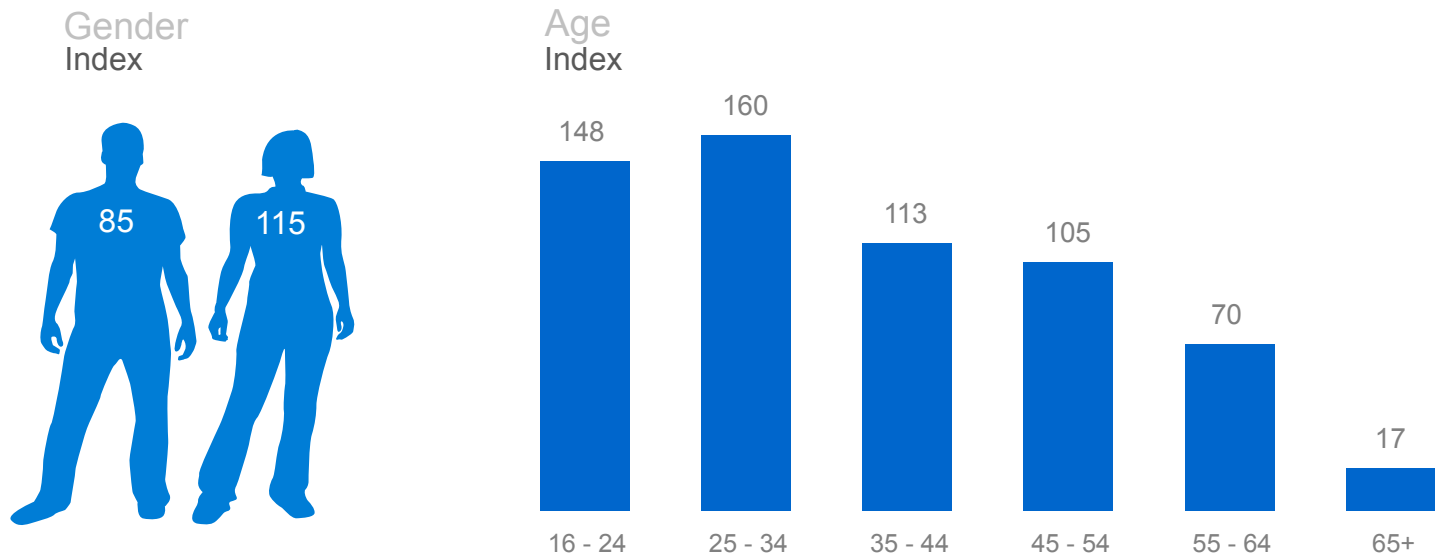
Women and the under 34s are the most likely to convert online

Purchase

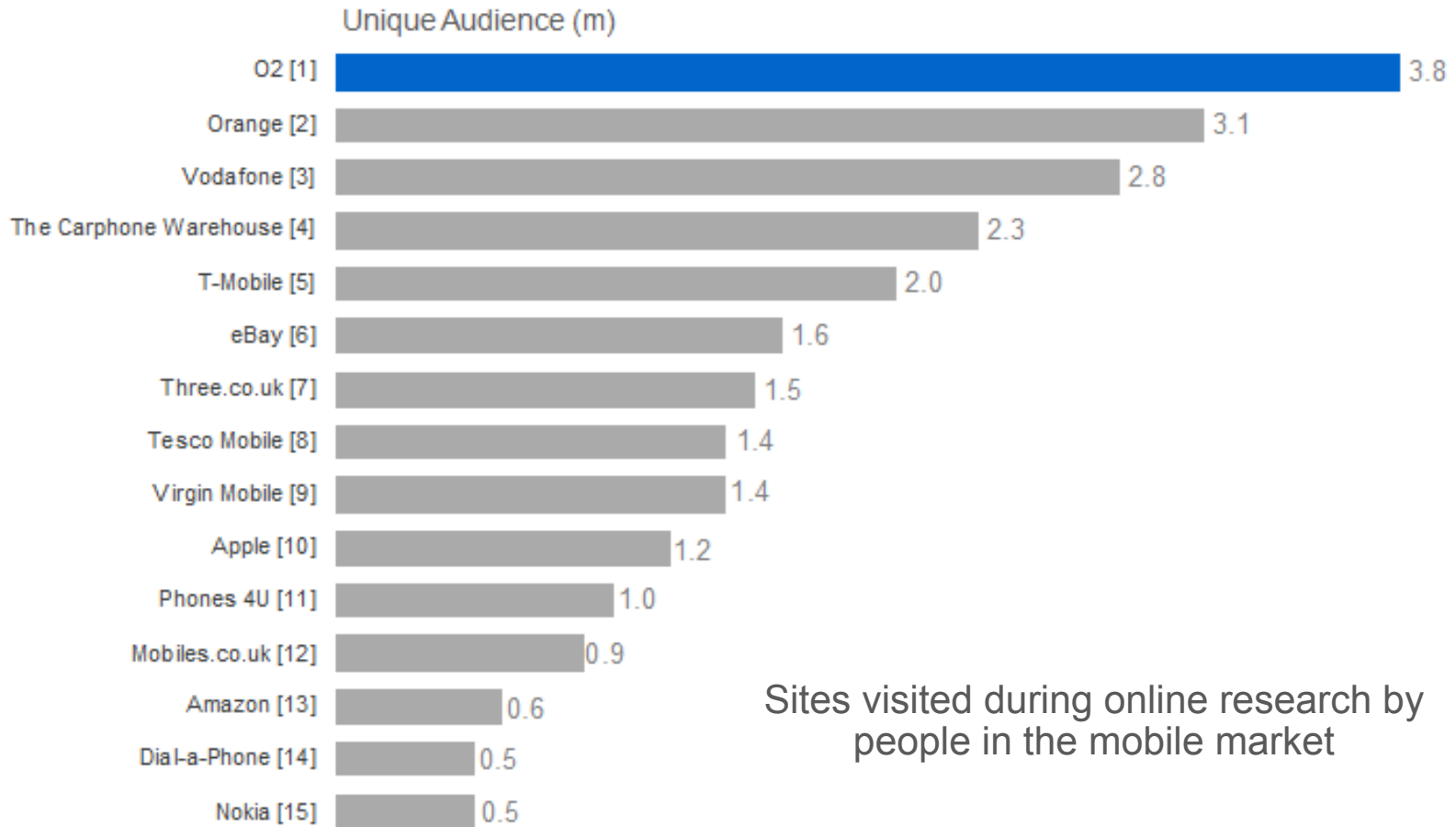Those that made a purchase are more likely to be women and someone aged under 34

Gender
Index

85   115

Age
Index

16 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
148	160	113	105	70	17

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Base: Purchasers in the mobile market
Note: Profile of Purchasers in the mobile market; All figures are Based on Index v Active Internet Population

Source: Google/Nielsen, The Role of Search in a Customer's Mobile Experience, UK, February – April 2010

Mobile: **Results**

Consumers are perhaps doing their research themselves and becoming less reliant on resellers

Unique Audience (m)

Site	Value
O2 [1]	3.8
Orange [2]	3.1
Vodafone [3]	2.8
The Carphone Warehouse [4]	2.3
T-Mobile [5]	2.0
eBay [6]	1.6
Three.co.uk [7]	1.5
Tesco Mobile [8]	1.4
Virgin Mobile [9]	1.4
Apple [10]	1.2
Phones 4U [11]	1.0
Mobiles.co.uk [12]	0.9
Amazon [13]	0.6
Dial-a-Phone [14]	0.5
Nokia [15]	0.5

Sites visited during online research by people in the mobile market

In 2008 Comscore mobile clickstream research, the most visited sites were Carphone Warehouse, O2 and Phones4U

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On average mobile phone shoppers do 10 searches prior to conversion

Last click is NOT "king" – advertisers need to be more sophisticated in the values they attribute to clicks earlier in the path

In 2008 Comscore mobile clickstream research, the average number of searches was 8.5

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Source: Google/Nielsen, The Role of Search in a Customer's Mobile Experience, UK, February – April 2010

③ Typical profile of a mobile online converter

		Purchase (those who converted online)	Total (all people in the mobile market)
①	Audience Size	0.6m	12.1m
②	Average Journey Length	33 days	18 days
③	Sites Visited per Person	5.2 sites	2.9 sites
④	Sites Visits per Person	11.9 times	4.8 times
⑤	Web Sessions per Person	7.9 sessions	3.5 sessions
⑥	Time Spent per Person	1 hr 39 mins	29 mins

Those that made a purchase visited more sites, more times, over more sessions and spent more time within the category

The average journey length of someone who converted is 33 days. Ensure cookie lengths are over 30 days to capture all relevant activity.

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Base: All and Purchasers in the Mobile market
Note: Activity of all versus purchasers in the Mobile market

10

Source: Google/Nielsen, The Role of Search in a Customer's Mobile Experience, UK, February – April 2010

4 **Store locators are not only important for customers who purchase offline**

1m
(or 15%) of those that got a quote used store locators

123k
(or 21%) of those who Purchased used store locators

Traditionally you would think store locators would be important to those purchasing offline; however one fifth of those who purchased online also used a store locator.

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Generic searches are an important part of the purchase journey

Generic Search Only

Brand
Search Only
62.9%

Both
10.6%

26.5%
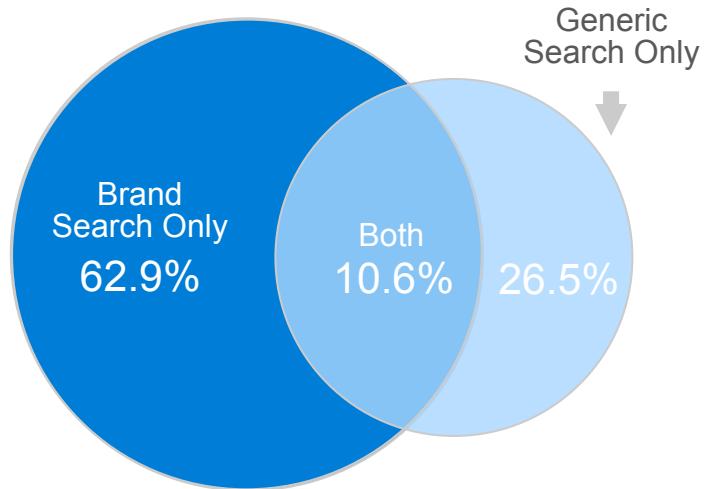
Illustrates the activity of those that used sponsored links and converted online

Of those who clicked on sponsored links, 26% of them only clicked on generic searches.

Without presence on generic terms you will be missing in many consumers' path to purchase.

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6 **Those who click on sponsored links are 2.2x more likely to purchase than others**

This could be due to the better targeted messaging a customer sees in ads, when they are ready to purchase.

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Mobile: **Key Takeaways**

Key takeaways

1 Consumers are visiting mobile operator sites more often than resellers; perhaps they are existing customers looking for an upgrade, or researching deals themselves rather than relying on resellers

2 Consumers are carrying out 10 searches before they buy; ensure you have the correct multi-click attribution model in place

3 Consumers who buy online take on average 33 days to purchase; ensure your cookie length is sufficient to capture this activity correctly

4 One fifth of those who converted online used store locators; it is not just a tool for offline customers

5 Generic searches are an important part of the conversion journey; ensure you are present on generic terms to be visible to the majority of your consumers

6 Consumers who click on sponsored links are 2.2x more likely to buy than those who don't

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