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:**

**STAGE 1**
- **Mobile Search Diary:** 458 mobile participated in a search diary study for 2 weeks using a mobile app. A total of 8,815 searches were logged.

**STAGE 2**
- **Follow Up Surveys:** Follow up surveys sent to participants to investigate outcomes of searches from previous day. 6,904 responses collected.

**STAGE 3**
- **Exit Survey:** Administered at end of the study to all 458 participants.
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.
Mobile Search In Singapore – The Context

7.99m 3G/4G Subscriptions

85% of adults use a smartphone

41% access the Internet more on smartphone than on computer

16% access the Internet only on smartphone

8% Don’t search on phone

18% Twice a week or less

13% 3 to 7 times a week

24% 2 to 3 times a day

36% 4 or more times a day

Included in this study

2.9 searches a day on average


Q 51. Do you use your mobile phone to conduct internet searches? If so, how often?
Mobile is the device most used for search

Q E3, Which device do you use most often to search the internet?
Mobile users search for a variety of information

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
<th>Weekdays</th>
<th>Weekends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average daily searches</td>
<td>2.9</td>
<td>3.0</td>
<td>2.8</td>
</tr>
</tbody>
</table>

% of total searches

- News & Weather: 12%
- Shopping & Retail: 11%
- Arts & Entertainment: 8%
- Travel: 8%
- General knowledge: 8%
- Restaurant/Dining: 7%
- Technology: 7%
- Finance: 6%
- Food & Groceries: 5%
- Beauty & Apparel: 4%
- Navigation: 4%
- Health & fitness: 4%
- Social Networks: 3%
- Home furnishing/appliances: 2%
- Automotive: 2%

Q D2: What category of information did you search for?
Mobile most used for search across categories due to speed and convenience

<table>
<thead>
<tr>
<th>% Use mobile phone most to search</th>
<th>Why use mobile for search?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation</td>
<td>Quickest way to search</td>
</tr>
<tr>
<td>Social Networks</td>
<td>Most convenient way to search</td>
</tr>
<tr>
<td>Restaurant/Dining</td>
<td>Urgent that i find info right away</td>
</tr>
<tr>
<td>Beauty, Apparel</td>
<td>Prefer to use my smartphone for searches</td>
</tr>
<tr>
<td>News &amp; Weather</td>
<td>No other option to find info</td>
</tr>
<tr>
<td>Food &amp; Groceries</td>
<td></td>
</tr>
<tr>
<td>Shopping &amp; Retail</td>
<td></td>
</tr>
<tr>
<td>Health &amp; Fitness</td>
<td></td>
</tr>
<tr>
<td>Finance</td>
<td></td>
</tr>
</tbody>
</table>

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.

![Search volume index - time of day](chart)

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

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

- 54% at Home
- 22% at Work
- 17% On the Go
- 4% In Store
- 4% Others

Q D3: Where were you when you did the search?
Search location varies by information sought

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
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
- Visited a website: 52%
- Visited a store physically: 12%

Sought more information
- Sought more information: 33%

Bought something
- Bought something: 16%
  - Bought something in a store: 5%
  - 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: 3%
  - Bought something on a tablet: 2%

Base: Total follow-up surveys n=6,904.
Q F1: Which of the following have you done as a result of this search?
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%**

- **22%** Face-to-face
- **10%** SMS/Messaging apps
- **5%** Other social media
- **5%** Email
- **3%** Phone call


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**

- **General Information search:** Came across something interesting and wanted to know more (41%)
- **Passive search:** Bored, just passing time, avoiding to talk to people around me (15%)
- **Decision oriented search:** Deciding on buying a product or service, checking details, price, location (53%)

**Decision oriented search: By Location**

<table>
<thead>
<tr>
<th>Location</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>At Home</td>
<td>50%</td>
</tr>
<tr>
<td>At Work/School</td>
<td>57%</td>
</tr>
<tr>
<td>On the Go</td>
<td>58%</td>
</tr>
<tr>
<td>In a Shop</td>
<td>62%</td>
</tr>
</tbody>
</table>

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

70% MORE LIKELY TO BUY SOMETHING IN A STORE

38% MORE LIKELY TO BUY SOMETHING ON A PC

2.75X AS LIKELY TO GO TO A RESTAURANT OR BAR

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.

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

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?

**Perception of mobile ads**

- **Mobile ads in a web browser**
  - Useful: 40%
  - Neutral / indifferent: 40%
  - Annoying: 18%

- **Mobile ads in search engine apps**
  - Useful: 40%
  - Neutral / indifferent: 43%
  - Annoying: 17%

- **Mobile ads in other apps Maps, Dictionary, Restaurants...**
  - Useful: 37%
  - Neutral / indifferent: 41%
  - Annoying: 22%
OF ALL SEARCHES DURING THE STUDY, RESPONDENTS NOTICED AN AD IN 38%
Consumers who click on an ad are twice as likely to buy something

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?

- 13% Didn't see ad
- 16% Saw ad, didn't click
- 30% Clicked on ad

Bought something

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?

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
**Source:** Google/Intuit Research Mobile Search Moments Study 2014. Base: Total respondents n=458.

### Gender
- Female: 51%
- Male: 49%

### Income
- Up to SGD 4000: 46%
- SGD 4001 to SGD6500: 30%
- SGD6501+: 24%

### Age
- 18 - 29: 32%
- 30 - 39: 44%
- 40+: 24%

### Occupation
- Home Maker, Retired, Students: 15%
- Blue Collar: 12%
- Self Employed: 7%
- White Collar: 66%

### Device Ownership
- Computer/laptop: 70%
- Tablet: 47%
- Mobile phone: 93%

### Time spent on internet daily

<table>
<thead>
<tr>
<th>Activity</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>For work</td>
<td>3.8</td>
</tr>
<tr>
<td>For Leisure</td>
<td>3.8</td>
</tr>
<tr>
<td>Total</td>
<td>7.6</td>
</tr>
</tbody>
</table>

Average Hours