UK Mobile Search: Topics and Themes
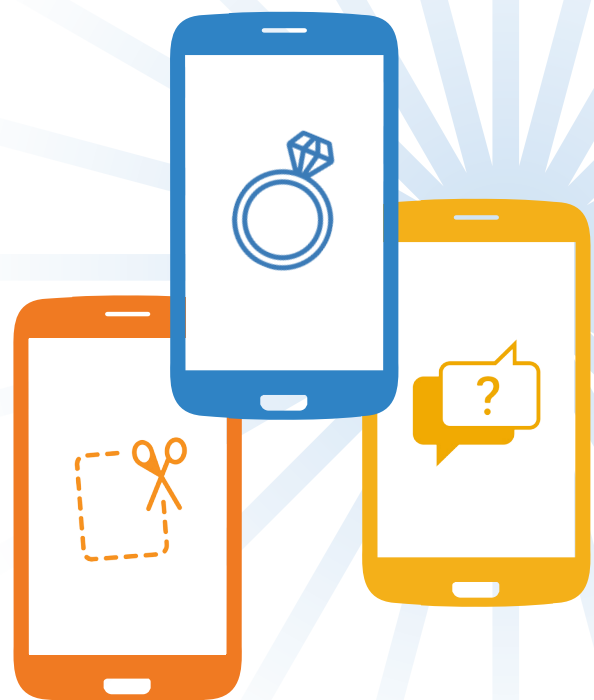
What do consumers search for from their smartphones and tablets?

CONSUMER INSIGHTS REPORT

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Introduction

In a short time, mobile devices have surged ahead of traditional computers in consumer demand and online traffic. More mobile devices are being shipped than desktops and laptops, and soon mobile will account for the majority of website visits overall. For many sites and industries, mobile has already crossed that threshold. Marketers who think there is still time to prepare before the mobile tipping point occurs should take note that mobile devices already account for a majority of online searches and the time for action is now.

This report will provide marketers with a guide to understanding the world of mobile search through a series of custom analyses conducted by Hitwise, a division of Connexity, that examine overall trends in mobile search in the United Kingdom. We'll reveal the types of searches

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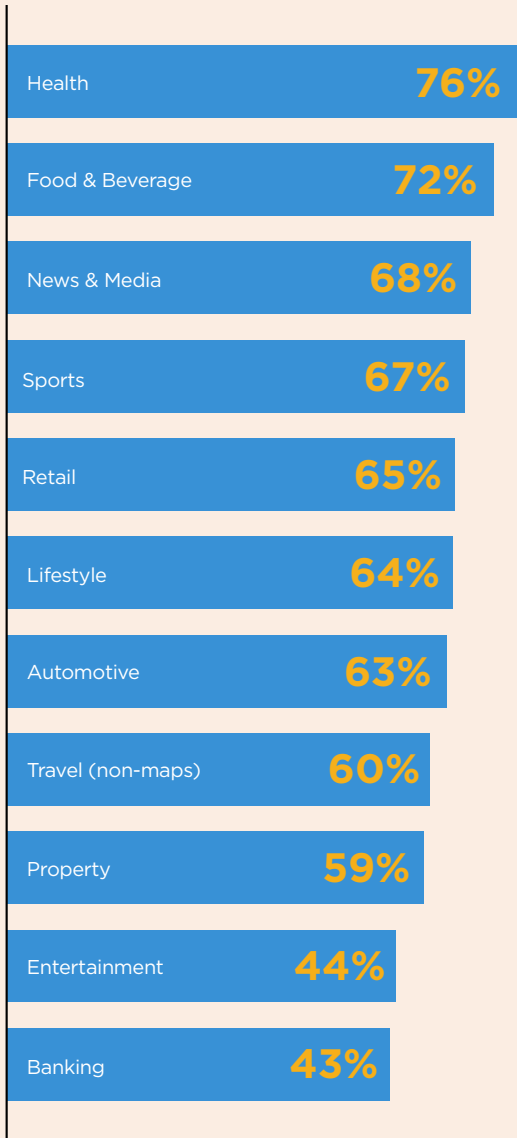
that are more likely to be conducted on mobile devices as well as desktops across three industries: Retail, Banking and Travel. The report also provides insight into a counterintuitive finding that shows how searches conducted from mobile devices are longer in length than those initiated on a desktop and provide suggestions for actioning this report.

Overview

Mobile devices now account for a majority—or near majority—of online searches for almost every major industry. That's according to an analysis which examined hundreds of millions of online search queries measured by Hitwise across multiple devices, including 1.2 million smartphones and tablets. The analysis, which leveraged the new AudienceView™ platform, focused on a four-week period beginning 10th April and ending 7th May, 2016 and included searches performed on all search engines. Smartphones and tablets, the analysis found, now account for 76% of online searches that result in a visit to a Health site, the greatest of any of the analysed sectors. The Food & Beverage industry, too, sees a similarly high share of searches being initiated on a mobile device with 72% of searches resulting in a click to this industry coming from mobile.

Not every industry, however, has reached the point where a majority of searches are coming from mobile. The Banking sector, for instance, gets just 43% of searches from mobile, the lowest of any analysed industry. Entertainment searches, too, are still largely desktop, at least among those that are conducted from a browser and not directly on an entertainment site or mobile app.

Share of online searches initiated on a mobile device, by industry

Industry	Share
Health	76%
Food & Beverage	72%
News & Media	68%
Sports	67%
Retail	65%
Lifestyle	64%
Automotive	63%
Travel (non-maps)	60%
Property	59%
Entertainment	44%
Banking	43%

Based on top search variations resulting in a click to the indicated industry, 10 April – 7 May 2016. Source: Hitwise, a division of Connexity

hitwise | A division of connexity

Mobile tends to serve a larger role in answering consumers' questions early on in the purchase journey

Our analysis further examined specific topics and themes of online searches to better understand those that are most likely to be initiated on a mobile device and those that are still predominantly desktop-centric. We found, for instance, that navigational searches and those mentioning a specific brand are routinely more likely than average to be conducted from a desktop, regardless of the industry. Meanwhile, location-based searches, like those specifying "near me" are consistently among those most heavily—nearly exclusively—initiated on mobile devices.

Mobile searches, the analysis found, are more likely to be structured in the form of a question, resulting in searches beginning with words like "how," "are" "where" and "is"

typically skewing more heavily mobile than average.

Searches that would fall into a need-to-know-now category, such as breaking news, medical symptoms and product recalls are also among those with a heavy tilt towards mobile.

And finally, when it comes to planning trips or big purchases, mobile tends to serve a larger role in answering consumers' questions early on in the purchase journey, but then declines somewhat as consumers move on to more intense research or conduct transactions.

The following sections of this report examine search trends in more detail, focusing on three key industries: Retail, Banking and Travel. Marketers can use the insights herein to develop smarter and more effective search campaigns as well as align their owned content to the devices that consumers turn to when searching for information on specific topics.

Retail

For the retail industry, understanding the device from which different online searches originate can mean the difference between closing a sale and not. That's because especially for traditional brick and mortar establishments, the smartphone has become an indispensable shopping tool providing consumers—sometimes within feet of a till—with information or offers that could seal or jeopardise a transaction.

According to our analysis, 62% of searches resulting in a visit to the Hitwise Retail 300 (a collection of the top 300 retail websites) now come from smartphones or tablets.

Location-based retail searches, like every other industry, are among those most heavily skewed towards mobile. These include searches that incorporate the phrases "near me" as well as "opening times" and those that are looking for "where to find…" or "buy" a product. Likewise, comparison searches that have the potential to close a sale, such as those focused on "returns," "price match" or "reviews" were initiated on a mobile device at least 71% of the time in our analysis.

Retail search themes
% of searches initiated on mobile

Opening Times
82%
Mobile shoppers want to know who's open for business.

Engagement Rings
88%
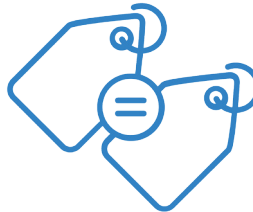Mobile is the preferred device for top-secret purchases.

Reviews
84%
Shoppers are seeking information in-store. Be the one to deliver it.

Finance
83%
Mobile may be the only connected device of struggling consumers.

Price Match
77%
Close the deal. Make information easy to find via mobile.

Sale
77%
Consumers are seeking out sales while out shopping.

Understanding the device from which different types of searches typically originate and then formulating a strategy for engaging the consumers behind those searches is critical. And the risk of not doing so—lost sales, unhappy customers, missed opportunities, etc.—are enormous.

Deal-seeking is also the focus of retail searches that are frequently initiated on a mobile device. This further illustrates the fact that consumers are in-play even after they cross over the threshold of a store. According to our analysis, 77% of retail searches that mention "sale" are initiated on a smartphone or tablet. So too are 81% of searches seeking "deals" and 66% of "voucher" searches. Of course, deal-seeking searches for online purchases, like those looking for sale "codes" are less likely to start off on a mobile, as traditional computers are still the preferred device for conducting most types of online transactions.

In addition to searches tied to in-store shopping and deals, searches for items intended as gifts or other items that a consumer may want to keep under wraps, like "jewellery" and especially "engagement rings," are focused more heavily on a personal mobile device. This device choice minimises the risk that a significant other or older child will find evidence of such surfing through the browser history of a shared computer thus spoiling the surprise.

With so much shopping activity occurring online, including while consumers are shopping in physical stores, online search may be one of the best ways to influence shoppers. Understanding the device from which different types of searches typically originate and then formulating a strategy for engaging the consumers behind those searches is critical. And the risk of not doing so—lost sales, unhappy customers, missed opportunities, etc.—are enormous.

Banking and Finance

Given the sensitive nature and importance of online banking, this industry is one of the few where the majority of searches still originate on desktop devices. In fact, according to our analysis, only 43% of online searches driving a visit to a banking or finance site originate on a smartphone or tablet. However, there are still plenty of financial topics where mobile is now the go-to device when seeking specific information.

For instance, financial searches mentioning "near me" or "ATM" originate on a mobile device 83% and 73% of the time, respectively. And while it's intuitive that such location-based searches would skew mobile, it may come as a surprise that searches for "mortgage calculator" are also overwhelmingly mobile (77% of such searches are initiated on a mobile device).

"100 mortgages", incidentally, are even more mobile—to the point of being almost exclusively so. Some 92% of such searches are conducted on a mobile device. Searches for "interest rate," overall, are also solidly mobile (64%), indicating that today's would-be home buyers begin their journey on a smartphone.

Banking and Finance search themes
% of searches initiated on mobile

ATM
73%

Consumers in need of cash reach in their pocket—for their phone.

Mortgage Calculator
77%

Would-be home buyers reach for their phone when they need information.

Payday Loan
77%

Mobile should be the primary channel to reach low-income consumers.

Interest Rate
64%

Consumers largely use mobile when shopping for the best interest and loan rates.

Car Insurance
55%

While still mobile dominant, insurance searches are less mobile than financing ones.

Savings Bond
30%

Investment-related searches tend to be less mobile than average.

Another trend we saw in the analysis of financial searches by device is a tendency for products that appeal to those who may be struggling financially to skew more heavily mobile. For instance, 77% of searches for "payday loan" come from mobile, as do 78% of "no credit check" searches and 80% of searches including the word "guarantor."

Low-income consumers, who may not be able to afford a computer and an internet subscription at home, will likely turn to their phones to get information, be it financial or otherwise. So for marketers targeting this audience, it's critical to understand that they will be interacting digitally with your brand largely through a smartphone.

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Travel

Mobile devices, especially smartphones, are a key tool for travellers, especially during the early planning stages of a trip and once travellers have left home. Meanwhile, desktops become more important as consumers begin researching specific destinations and booking travel.

Today, 60% of all searches that result in a visit to a non-map Travel site originate on a mobile device. As expected, travel searches that include the word "near me" are among the most mobile-dominant with 88% of such searches initiated on a mobile device.

Searches likely to be conducted by would-be travellers looking for their next destination are also heavily mobile. For instance, 83% of searches looking for the "best time" to visit a location are initiated on a mobile device as are 80% of searches for "places to see/visit/stay" and 76% of searches for "things to do in…"
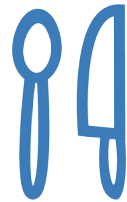
Another common mobile search involves asking "where is…," which is also likely tied to the earliest stages of planning a trip to an unfamiliar port of call.

Travel search themes
% of searches initiated on mobile

Flight Status
83%

In-transit travellers turn to their smartphone for the latest flight status update.
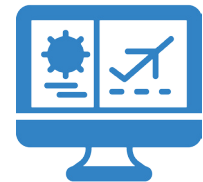
Places to Eat
86%

With the laptop at home, mobile provides tourists with on-the-ground tips.

Flights From
68%

Travellers looking for a destination rely more heavily on mobile.
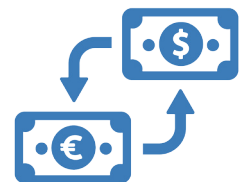
Book
51%

Once a destination has been selected, desktop use increases.

Best Time to Visit
83%

Mobile devices are the go-to device for early-stage travel planning.

GBP
12%

Financial topics are still heavily desktop-oriented.

Likewise, searches for "flights from" are more likely than "flights to" to be mobile with the former suggesting that the consumer is still unsure of their destination while the latter has made a decision and has pivoted to the booking stage.

Smartphones, are a key tool for travellers, especially during the early planning stages of a trip and once travelers have left home.

In fact, once travellers start making more concrete plans, we see desktop use rise— though still rarely achieving dominance. Take for example searches including top UK airport codes, like "LHR" or "LGW," which would be common for consumers seeking specific flight options. Fifty-seven percent of these searches are mobile (three points below the industry average). Likewise, only 51% of searches including the terms "book" or "booking" are mobile.

When it comes to specific travel locations, destinations in continental Europe are among the most common for UK travellers; and for the most popular destinations (Spain, Tenerife, Portugal, Italy, Malta) the mobile share of search was about 60%, slightly below average. However, when it came to top destinations in the United States (New York, Las Vegas, Florida), mobile played a heavier role with searches exceeding 70%. Income could be a driver of this pattern given that it typically costs more to travel across the Atlantic than it does to cross the English Channel and wealthier consumers are likely to be more mobile-savvy.

Another observed trend would seem to confirm this theory. Specifically, the analysis found that luxury travel is usually mobile. In fact, more than eight-in-ten searches for "4 star," "5 star," "luxury," "spa break" and "glamping"—a term used to describe glamorous camping—are conducted from a mobile device.

Mobile search shows character

Common sense tells us that online searches initiated on mobile devices would tend to be shorter and more concise than those initiated on desktops. However, in this case, common sense is dead wrong. In fact, our analysis found the exact opposite. In case after case, across industries and across countries, searches conducted on mobile devices were longer, on average, than those conducted on desktops. For example, the analysis revealed that the average desktop-initiated search that resulted in a visit to a Food & Beverage site is 2.2 words or 13.8 characters in length. Compare that to the average mobile-initiated Food & Beverage search that measured 2.5 words or 15.5 characters in length, a relative increase of 16% and 13%, respectively, in search length.
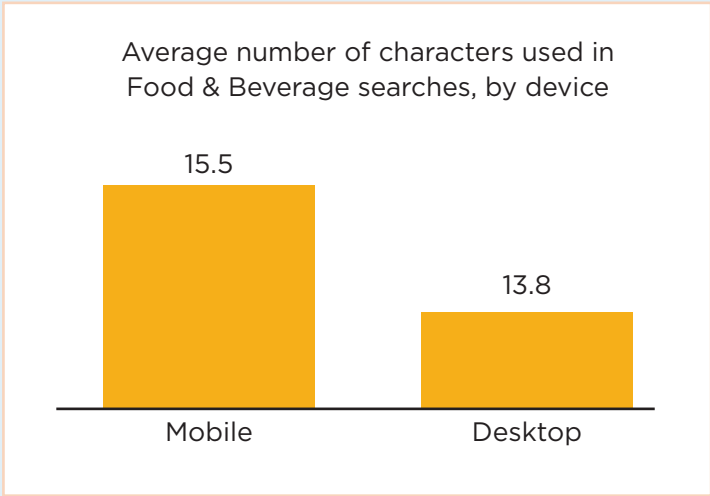
Reasons behind this are still not 100 percent clear as little research has been conducted in this space. A forthcoming Hitwise report on this topic will explore this pattern in greater depth providing some data-driven suggestions for what is causing this counterintuitive trend.

Average number of characters used in Food & Beverage searches, by device

15.5 Mobile

13.8 Desktop

Source: Hitwise, a division of Connexity

Action this report

Be discoverable.
Brands need to make sure that they are there when consumers need them and that means being aware of the device they're using. If mobile search isn't already an integral part of your SEO strategy, it should be.

Deliver value.
Once consumers find your brand, you need to ensure that your content is optimised to deliver value in a mobile-dominant era. Outdated content designed when desktops reigned supreme needs to be updated to engage consumers on mobile devices.

Marketers need to be more strategic about prioritising their mobile optimisation and content strategies. Understanding patterns observed in online search across mobile and desktop devices—starting with those revealed in this report—can go a long way in informing these plans.

For marketers to more effectively engage their audience, they need to consider the device through which consumers are using when seeking specific information and then create

content that is tailored for that device. This will ensure that the brand is both discoverable and deliver value in a way that is optimised to the device being used.

For example, earlier in the report we revealed that 92% of searches for "100 mortgage" are initiated on a mobile device. Given this information, step one for financial institutions should be to their search campaigns to ensure that their brand is discoverable.

But if the financial institution's content focusing on such mortgages relies primarily on long articles, downloadable PDFs and long enquiry forms that were designed for desktop consumption, it will fail to deliver the much needed value to the growing number of consumers who arrive at their site from a smartphone or tablet.

> Marketers should be sure they understand mobile-dominant themes in order to connect and engage with consumers in a device-specific way.

To deliver value, the financial institution needs to develop content that's easy to consume on a mobile device, such as a short video on 100 mortgages or an infographic helping a home-buyer decide between those or other mortgage options.

Prioritising the development of mobile optimised mortgage content over, say, content focused on savings bonds—a topic skewed heavily towards desktops—will help the financial institution deliver more engaging brand experiences and build lasting relationships.

The information in this report is a great start for understanding mobile search trends overall as well as those for certain industries. But marketers should also be sure that they understand the specific mobile-dominant themes among their target audience so that they can successfully connect and engage with them in a device-specific way. It may seem like a daunting task, but Hitwise can help.

> For more information, visit **connexity.co.uk/hitwise** or email **contacthitwise.uk@connexity.com**.

About The Author

John Fetto is Senior Research and Marketing Analyst at Hitwise. In his role, he is responsible for converting complex data into clear and concise consumer insights that are consumable and actionable by non-analysts. Providing a complete 360-degree view of consumers is one of his areas of expertise, allowing marketers to better understand how to reach the right customer through the right channel with the right message. Prior to joining Hitwise, John served as a Senior Product Manager and Senior Marketing Manager at Simmons Research. He also held the role of Research Editor for *American Demographics* magazine where he identified and tracked demographic and consumer trends for leaders in the market research industry.

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