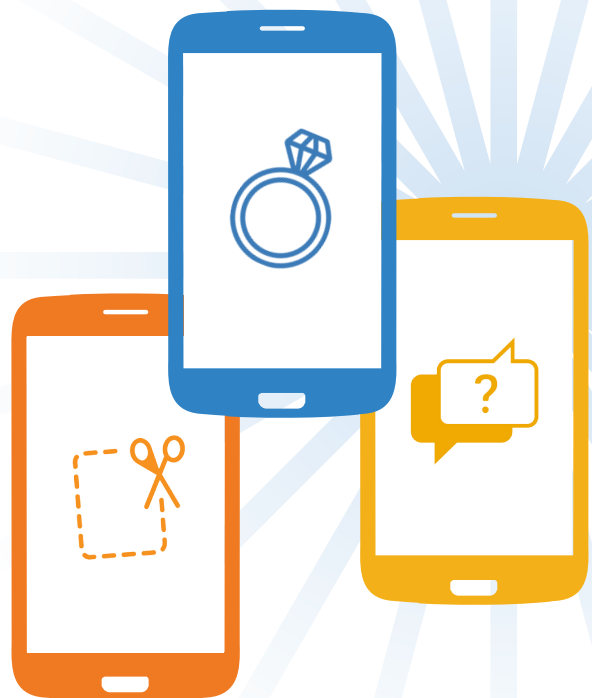# Mobile Search: Topics and Themes

What do consumers search for from their smartphones and tablets?

CONSUMER INSIGHTS REPORT

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 States. We'll reveal the types of

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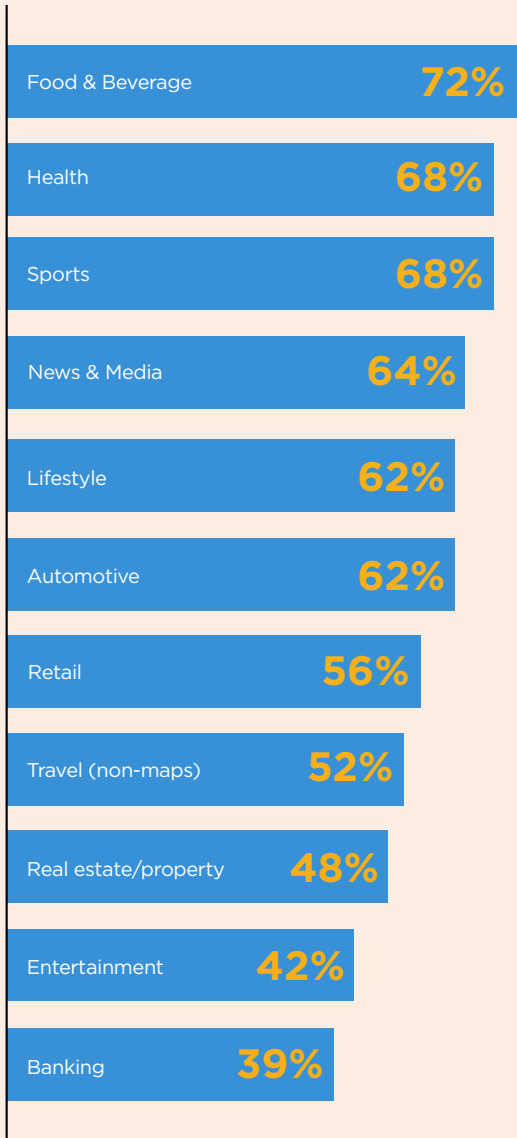
searches that are more likely to be conducted on mobile devices as well as desktops across four industries: Retail, Banking, Travel and Food & Beverage. The report also provides insight into a counterintuitive finding that shows how searches conducted from mobile devices are longer in length than those 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 3.5 million smartphones and tablets. The analysis, which leveraged the new AudienceView™ platform, focused on a four-week period beginning April 10 and ending May 7, 2016 and included searches performed on all search engines. Smartphones and tablets, the analysis found, now account for 72% of online searches that result in a visit to a Food & Beverage site, the greatest of any of the analysed sectors. The Health industry, too, sees a similarly high share of searches being initiated on a mobile device with 68% 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 39% 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
Food & Beverage	72%
Health	68%
Sports	68%
News & Media	64%
Lifestyle	62%
Automotive	62%
Retail	56%
Travel (non-maps)	52%
Real estate/property	48%
Entertainment	42%
Banking	39%

Based on top search variations resulting in a click to the indicated industry, April 10 – May 7, 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 were most likely to be initiated on a mobile device and those that were still predominantly desktop-centric. We found, for instance, that navigational searches and those mentioning a specific brand are much 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 four key industries: Retail, Banking, Travel and Food & Beverage. 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 register—with information or offers that could seal or jeopardize a transaction.

According to our analysis, 56% of searches resulting in a visit to the Hitwise Retail 500 (a collection of the top 500 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 words "near me," "hours," "24 hour" and those that start out with "where to buy…" Likewise, comparison searches that have the potential to close a sale, such as those focused on "return policy," "price match" or "reviews" were initiated on a mobile device at least 77% of the time in our analysis.

Retail search themes
% of searches initiated on mobile

24 hour
82%

Mobile shoppers want to know who's open for business.

Engagement Rings
82%

Mobile is the preferred device for top-secret purchases.

Reviews
82%

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

Layaway
89%

Mobile may be the only connected device of struggling consumers.

Return Policy
77%

Fight buyer's remorse, make information quick and easy to find via mobile.

Coupon
77%

Consumers are still in-play even after entering a store.

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 "coupon" are initiated on a smartphone or tablet. So too are 73% of searches seeking a "sale" and 68% of "discount" searches. Of course, deal-seeking searches for online purchases, like those looking for a "promo code" are more likely to start off on a desktop, 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 "jewelry" and especially "engagement rings," are focused more heavily on a personal mobile device. This device choice minimizes 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 39% 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 "ATM" or "near me" originate on a mobile device 84% and 83% 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 "15-year" and "30-year mortgage" are also overwhelmingly mobile (73% of such searches are initiated on a mobile device). So are "interest rate" (65% mobile) and "mortgage calculator" (55% mobile) searches, indicating that today's would-be new home buyers begin their journey to home ownership on a smartphone.

Banking and Finance search themes
% of searches initiated on mobile

ATM
84%

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

30-year mortgage
73%

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

Payday Loan
70%

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

Interest Rate
65%

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

Car Loan
58%

While still mobile dominant, these searches are less mobile than mortgage searches.

Credit Report
38%

Mobile devices get some time off when big purchases near the final stage.

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, 74% of searches for "disability insurance" come from mobile, as do 70% of "payday loan" searches and 60% of searches including the word "prepaid."

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 travelers during the early planning stages of a trip and once a trip has begun. Meanwhile, desktops become more important as consumers begin researching specific destinations and booking travel.

In the United States, 52% of 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 87% of such searches initiated on a mobile device.

Searches likely to be conducted by would-be travelers looking for their next destination are also heavily mobile. For instance, 79% of searches looking for the "best time" to visit a location are initiated on a mobile device as are 72% of searches for "places to see/visit/stay" and 75% of searches for "things to do in…" Another mobile-dominant search theme includes those asking their browsers "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

Wait time
93%

Time-pressed travelers turn to mobile to find estimated security wait times.

Places to eat
88%

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

Flights from
66%

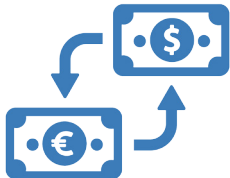Travelers looking for a destination rely more heavily on mobile.

Flights to
53%

Once a destination has been selected, desktop use increases.

Best time to visit
79%

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

Exchange rate
34%

Financial topics are still heavily desktop-oriented.

Once travelers start making more concrete plans, however, we see desktop use rise—though rarely achieving dominance anymore. Take for example the fact that 66% of searches for "flights from" are mobile compared to only 53% of searches for "flights to." A would-be traveler searching for the former is likely unsure of their destination while the latter has made a decision—or at least narrowed the field—and has pivoted to the booking stage at which point they rely to a greater degree on desktops.

Sixty-six percent of searches for "flights from" are mobile compared to only 53% of searches for "flights to."

In-transit travelers and those who have arrived at their destination once again rely primarily on their phone or tablet when they need information, with many likely having left their laptop at home. For instance, 93% of searches for "wait time" are mobile-initiated, as are 74% of queries seeking information on baggage allowances, weight, etc. Likewise, 88% of searches for "places to eat" are conducted on a mobile device.

When it comes to specific travel destinations, domestic locales are not only the most popular, but they're also the most skewed towards mobile search. For instance, more than 62% of travel searches for "New York," "Las Vegas," "Florida" and "Chicago" are initiated on a mobile device. Meantime, mobile plays a smaller role in searches for destinations in Europe with fewer than 40% of searches for "Paris," "Italy," "Europe" and "London" being mobile-initiated. This may be due to the fact that travelers are already somewhat familiar with domestic destinations and can get the information they need from a mobile device while international travelers need to spend more time and focus researching a trip abroad—something they're more comfortable doing on a larger screen.

Food & Beverage

The industry receiving the greatest share of search traffic from mobile devices is Food & Beverage. This industry, consisting of recipe sites, restaurants as well as food brands and manufacturers receives 72% of referred visits from searches initiated on a smartphone or a tablet. And it's easy to understand why food and beverage searches are so heavily mobile.

When hungry consumers are out and about and looking for somewhere to eat, they turn to their smartphone. When hungry consumers are looking for inspiration for a home-cooked meal or a quick tip, they reach for their smartphone or tablet—the modern cookbook—and get the information they need whether they're standing in their kitchen or wandering the aisles of a supermarket.

Food & Beverage search themes
% of searches initiated on mobile

Shots
95%
Smartphones and tablets are the modern Bartender's Bible.

Is/Are…?
88%
Is soy sauce vegan? Are M&Ms gluten-free? Your phone knows.

How to…
82%
Cooks looking for kitchen tips let their phone show them how.

Ideas
80%
Mobile devices can deliver meal inspiration from the kitchen to the supermarket.

Recall
80%
Food safety concerns are serious and can strike at any time.

Calories
79%
Dieting? Better check your phone before you eat that.

Among searches that skew the heaviest towards mobile devices are those that start with "is" or "are," as in "are olives healthy?" or "is corn paleo?" Along similar lines, reference searches, such as those seeking the number of "calories" in a food item, "substitution" suggestions for a recipe ingredient or information on a particular food "recall" are also more likely to be conducted on a mobile device.

Consumers want meal inspiration that they can engage with quickly and effortlessly on a five-inch screen.

Interestingly, searches related to alcohol also tend to be more mobile. For instance, 95% of searches focusing on "shots" come from mobile as do 90% of searches mentioning "alcohol" and 85% of searches citing "happy hour."

As usual, location-based searches are also among the most heavily skewed to mobile. Specifically, 82% of "near me" and 85% of "restaurants in..." searches are conducted on a smartphone or tablet. Searches for a restaurant's "hours," "specials" and "reservation" requests are also above average for mobile.

And finally, inspiration-focused searches, such as those starting with "What can I make with..." or include "ideas" are heavily mobile because you never know where you'll be when inspiration (or the need for inspiration) strikes. But when it does, more often than not consumers reach for their phone. And when they make a selection from their search results, they don't want to pinch and zoom their way across an unresposive site for the information they need. They want meal inspiration that they can engage with quickly and effortlessly on a five-inch screen.

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.
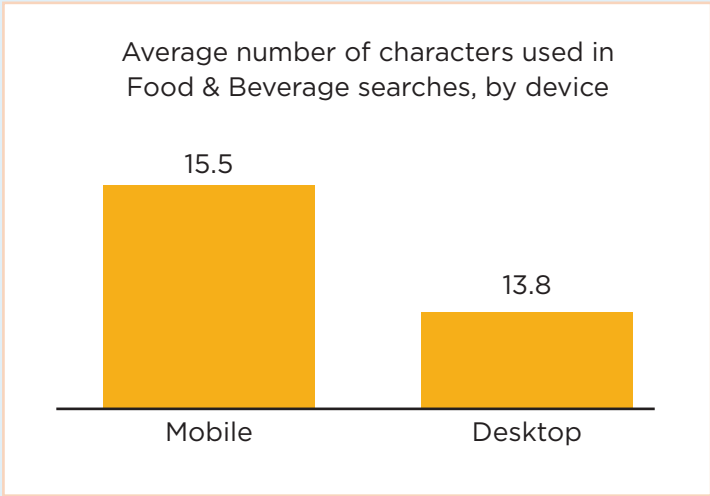
Reasons behind this are still not 100 percent clear as little research has been conducted in this space. A forthcoming Hitwise report on this topic will explore this pattern in greater depth providing some data-driven suggestions for what is causing this counterintuitive trend.

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

Mobile	Desktop
15.5	13.8

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 optimized 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 prioritizing their mobile optimization 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

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

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

For example, earlier in the report we revealed that 73% of searches for "30-year mortgage" are initiated on a mobile device. Given this information, step one for financial institutions should be to optimize 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 inquiry 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.

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 30-year mortgages or an infographic helping a home-buyer decide between a 15- or 30-year mortgage package.

Prioritizing the development of mobile optimized mortgage content over, say, content focused on credit reports—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.com/hitwise** or email **contacthitwise.us@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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