



PERFORMICS

Search Strategies for Smartphones vs. Tablets

Follow along using #MobileSearch



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**A copy of today's presentation will be sent to all attendees within 48 hours*

Our Presenters

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comScore Customer Knowledge Platform: A granular 360° view of the multitude of online activities for 2 million global users



Designed to be representative of the total online population.
TRUSTe certified for information privacy & security.



PERFORMICS

Performics inspires participation by applying the principles of performance marketing to drive relevant connections across owned, paid and earned media.

- We offer a robust suite of performance marketing solutions:
 - Search Marketing (Paid and SEO)
 - Content & Conversion Optimization
 - Analytics and Research Services
 - Display Ad & Social Ad Performance Marketing
 - Affiliate Marketing
 - Mobile Performance Marketing
 - Reputation Management & Social Media Asset Optimization
- Categories: auto, CPG, education, financial services, healthcare, retail, technology and telecommunications
- Nearly 800 team members in 15 countries
- We put skin in the game: nearly 25% of revenue is derived from client ROI

A FEW OF OUR CLIENTS:



Agenda

- **What are Mobile Consumers Using to Access the Web?**
 - **How are Mobile Consumers Connecting to the Web?**
 - **What are Mobile Consumers Doing on the Web?**
 - **Who are the Mobile Consumers on the Web?**
-
- **Mobile Search & Shopping**
 - **Paid Search Trends for Smartphones & Tablets**
 - **How Mobile SEO & Local Intersect**
 - **What You Can Do With Today's Information**

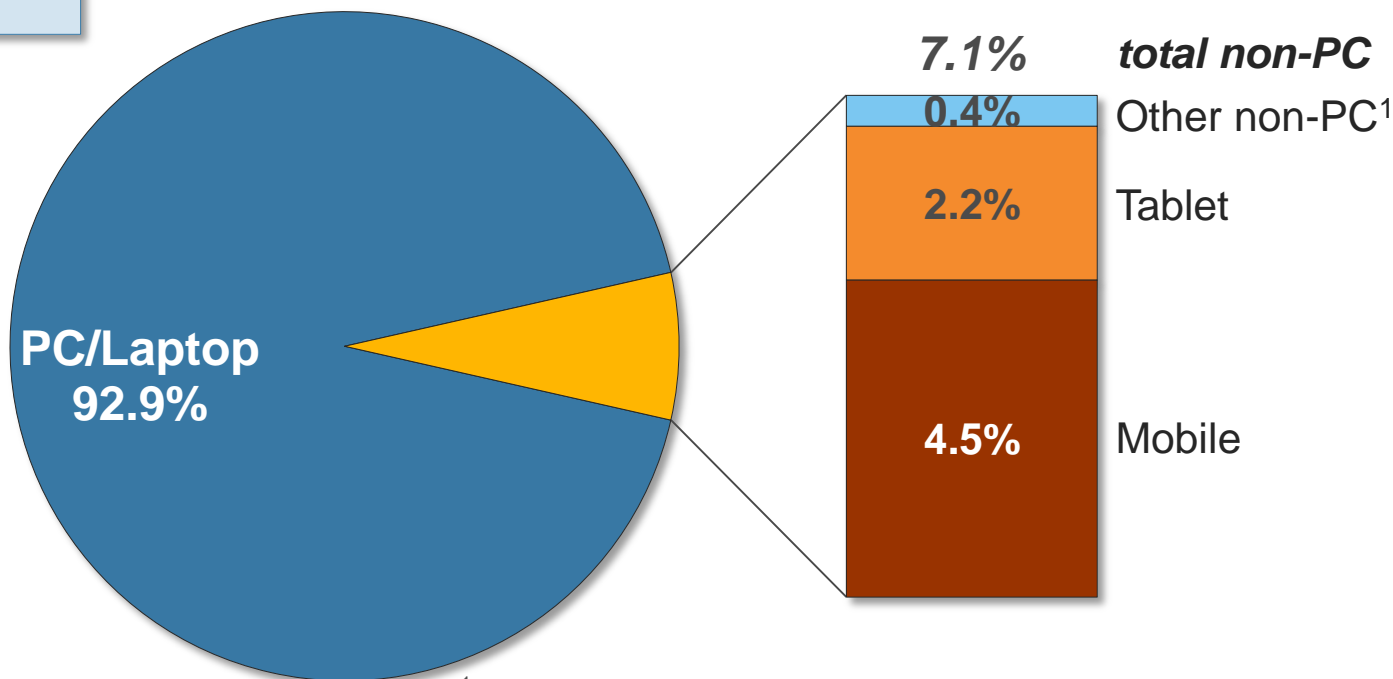
What are Mobile Consumers USING to Access the Web?

PCs Still Dominate 93% of Web Traffic...

PCs are still the
#1 way to access
the web

Device Share of US Page Views

Source: comScore Device Essentials, October 2011

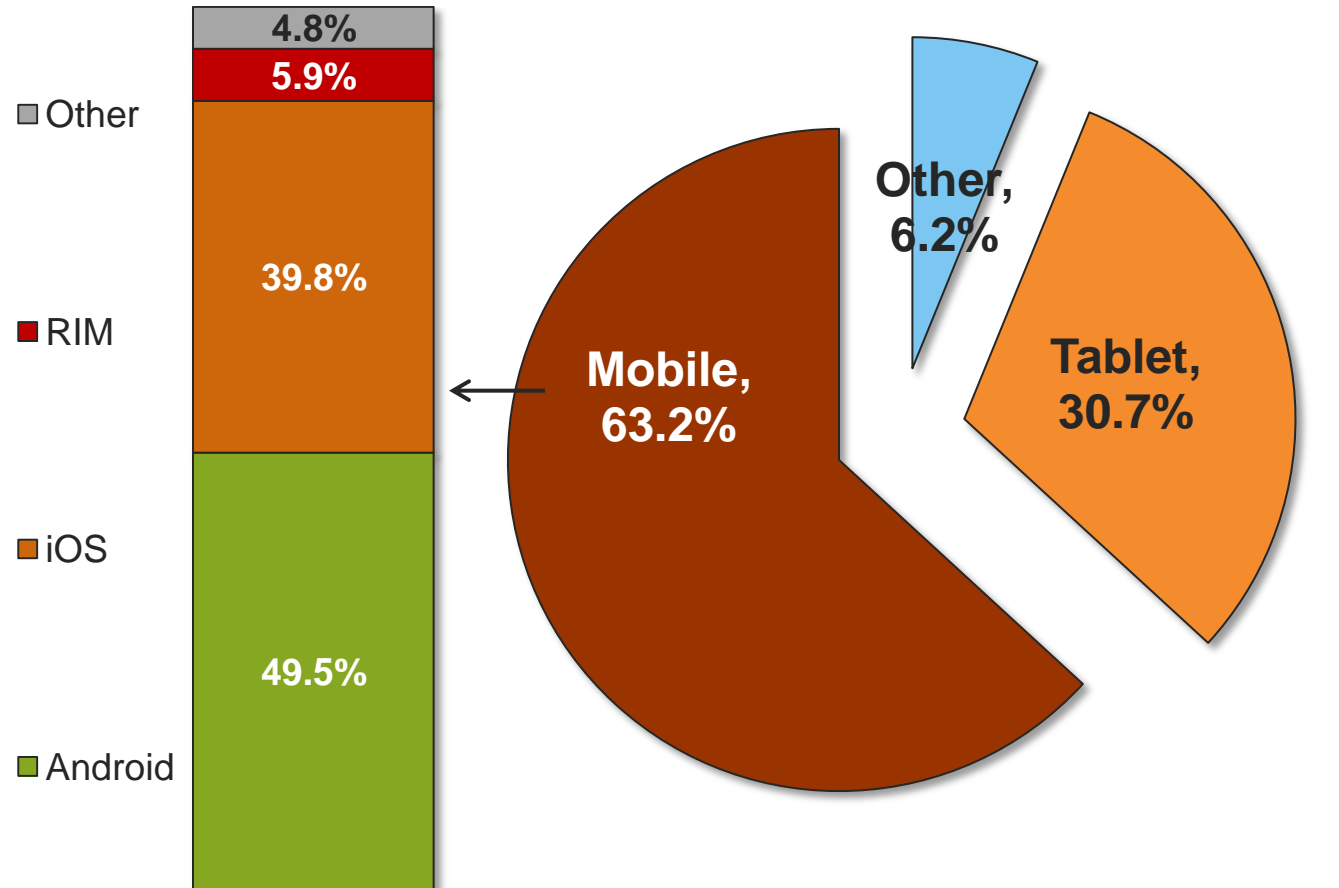


¹ Other non-PC includes browser-enabled devices such as handheld media players (iPod Touch, etc), eReaders, gaming consoles, smart-TV devices, etc.

...Of the Remaining 7% of Web Traffic driven by Connected Devices, 63% is consumed by Mobile Phones...

Non-PC Share of US Page Views

Source: comScore Device Essentials, October 2011

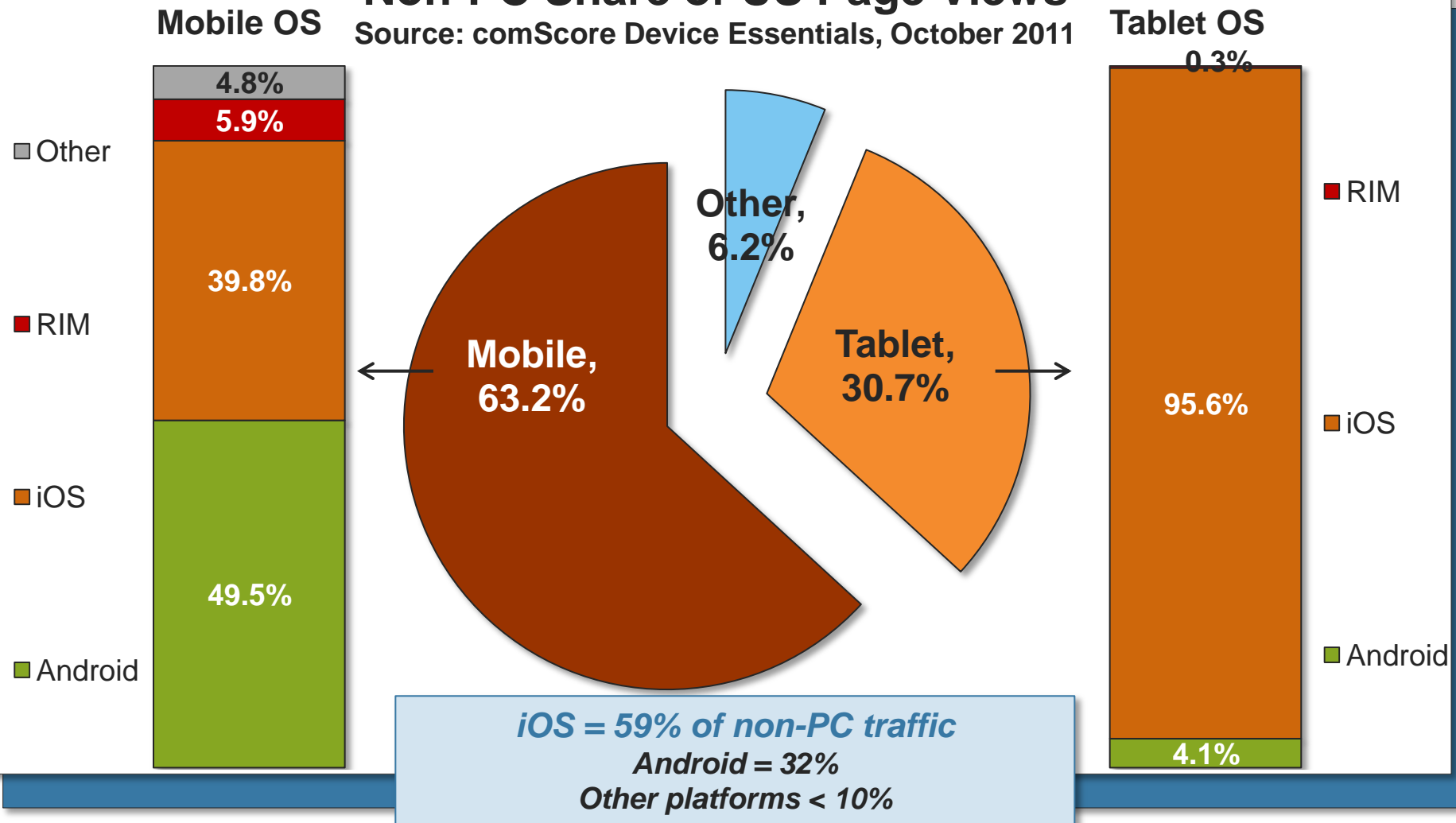


1/2 of mobile phone page views are performed by **Android** devices

...31% of Non-PC web Traffic comes from Tablets, which iOS dominates...

Non-PC Share of US Page Views

Source: comScore Device Essentials, October 2011

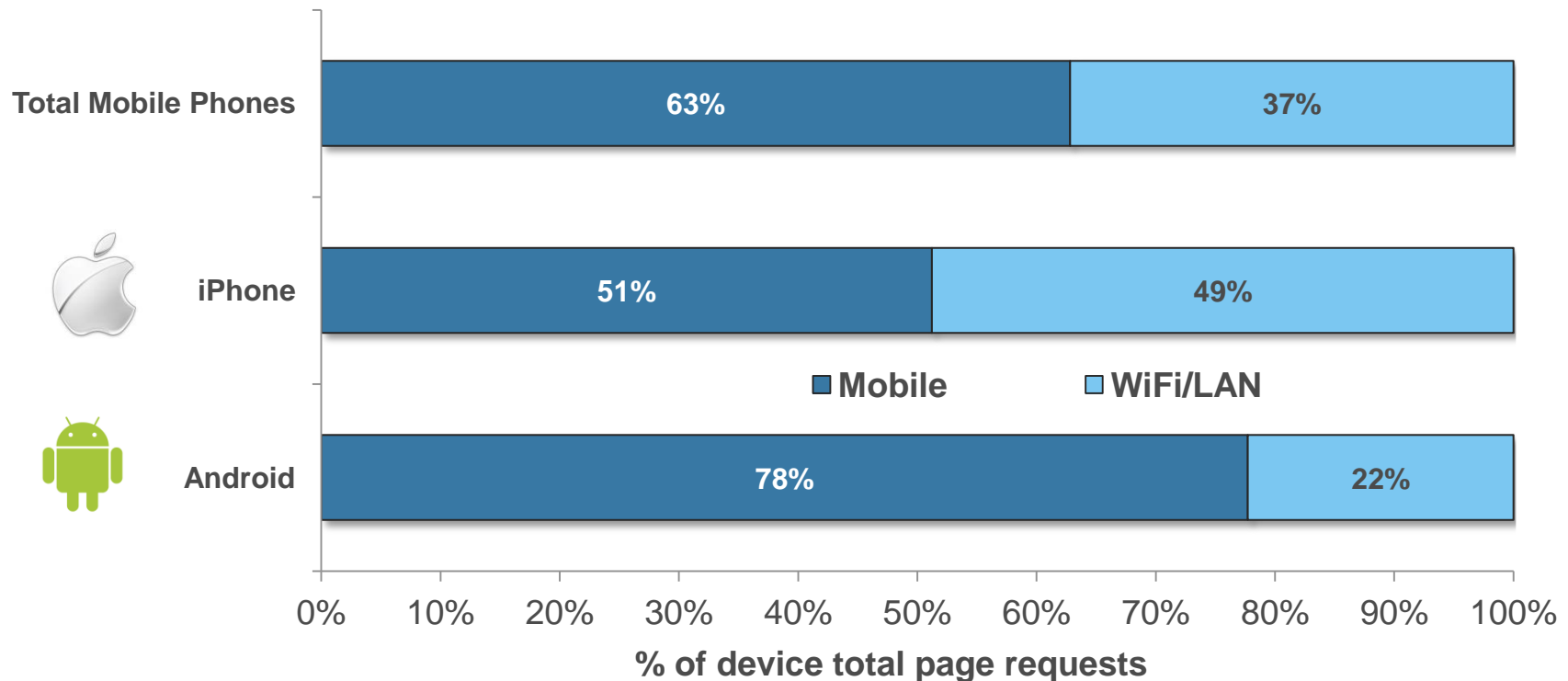


How are Mobile Consumers CONNECTING to the Web?

Overall, mobile users consume about two-thirds of web content via mobile networks, however this varies widely by platform

Mobile Device Traffic by Connection

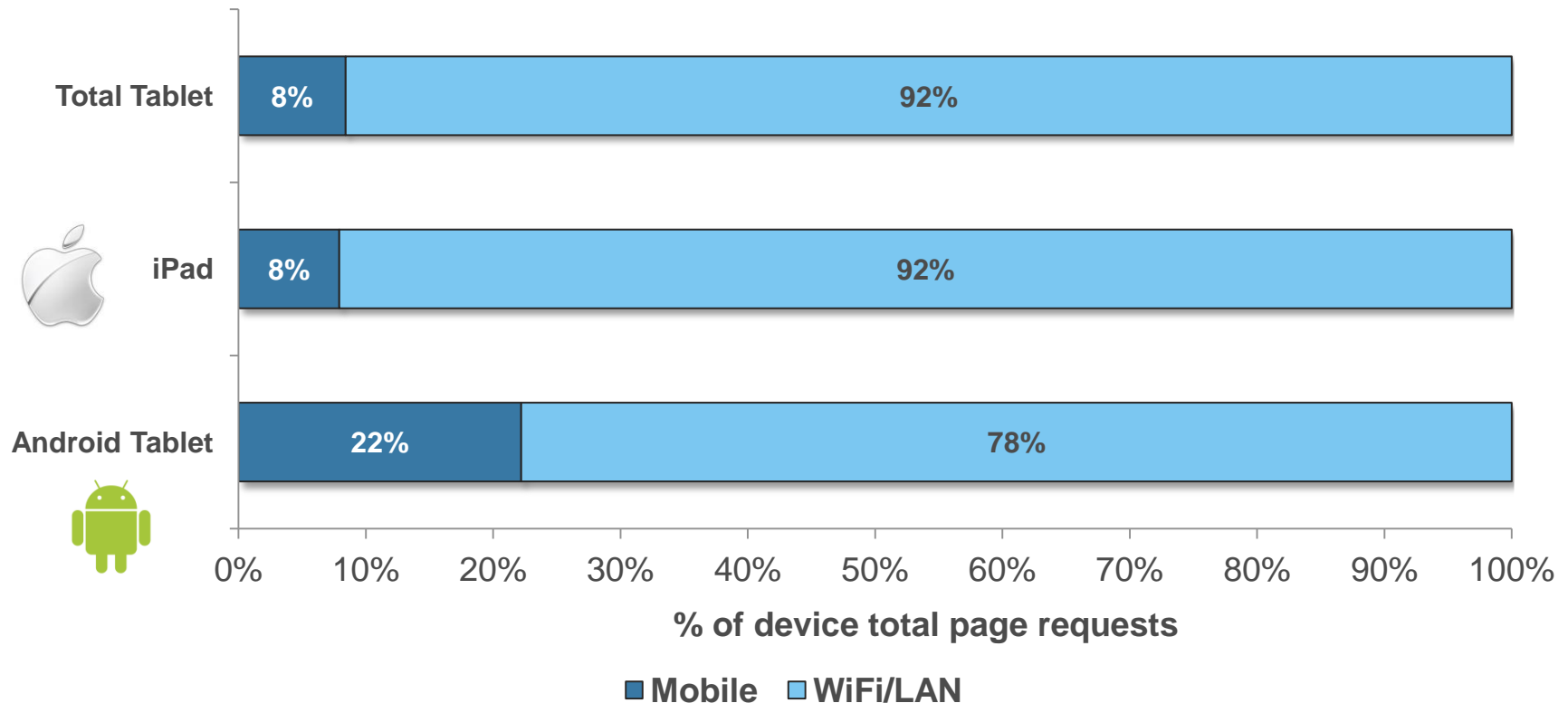
Source: comScore Device Essentials, October 2011



...However, tablets are significantly more likely to connect through WiFi connection

Share of Tablet Traffic

Source: comScore Device Essentials, October 2011



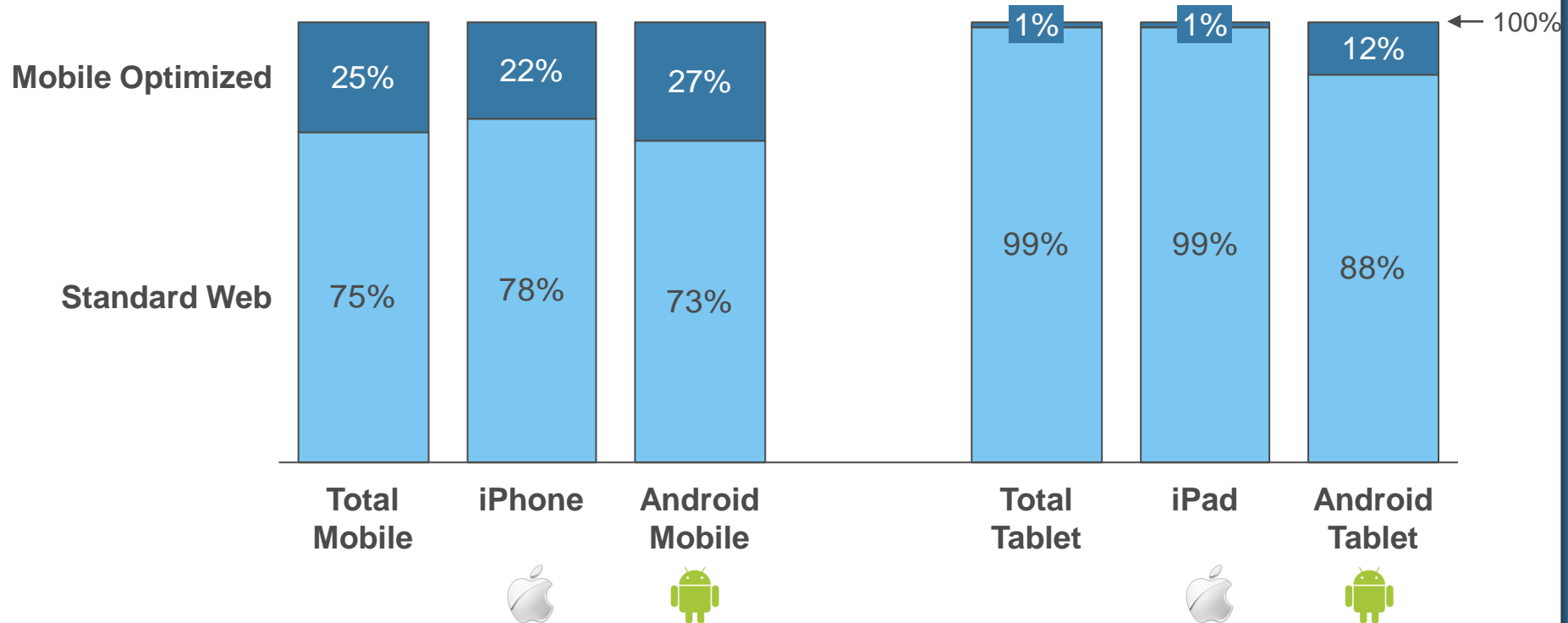
What are Mobile Consumers DOING on the Web?

Tablet devices typically view standard web sites v. mobile optimized sites

Sites may have trouble distinguishing Android tablets from phones... as a result Android tablets are served mobile-optimized pages

OS Share of Page Views by Page Type

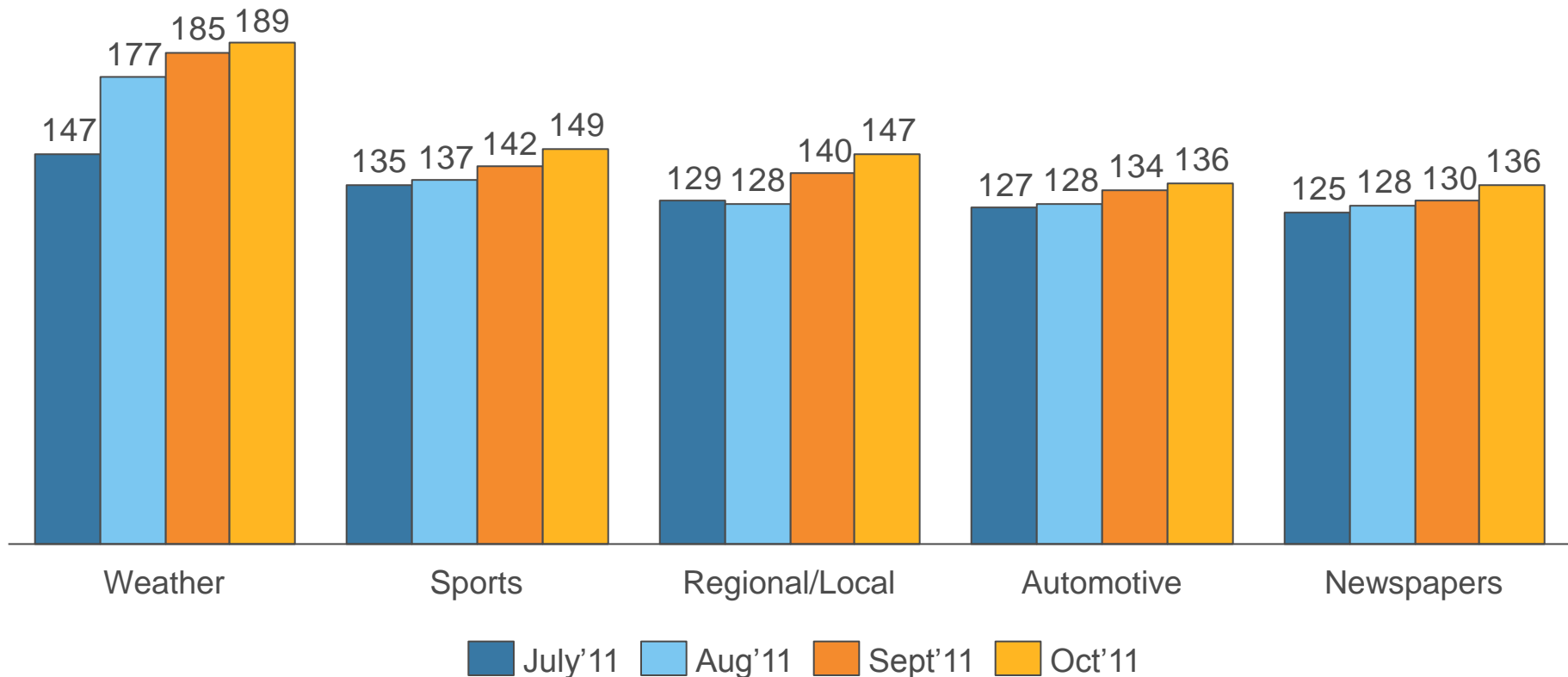
Source: comScore Device Essentials, October 2011



...content accessed by users connecting over a mobile network suggests users are accessing “on the go” or local-based information

Content Access via Mobile Network

Source: comScore Device Essentials, July-October 2011



Mobile Access share of category indexed to total internet

Content accessed on non-PC devices tends to be quick access, on-the-go content such as sports scores and weather

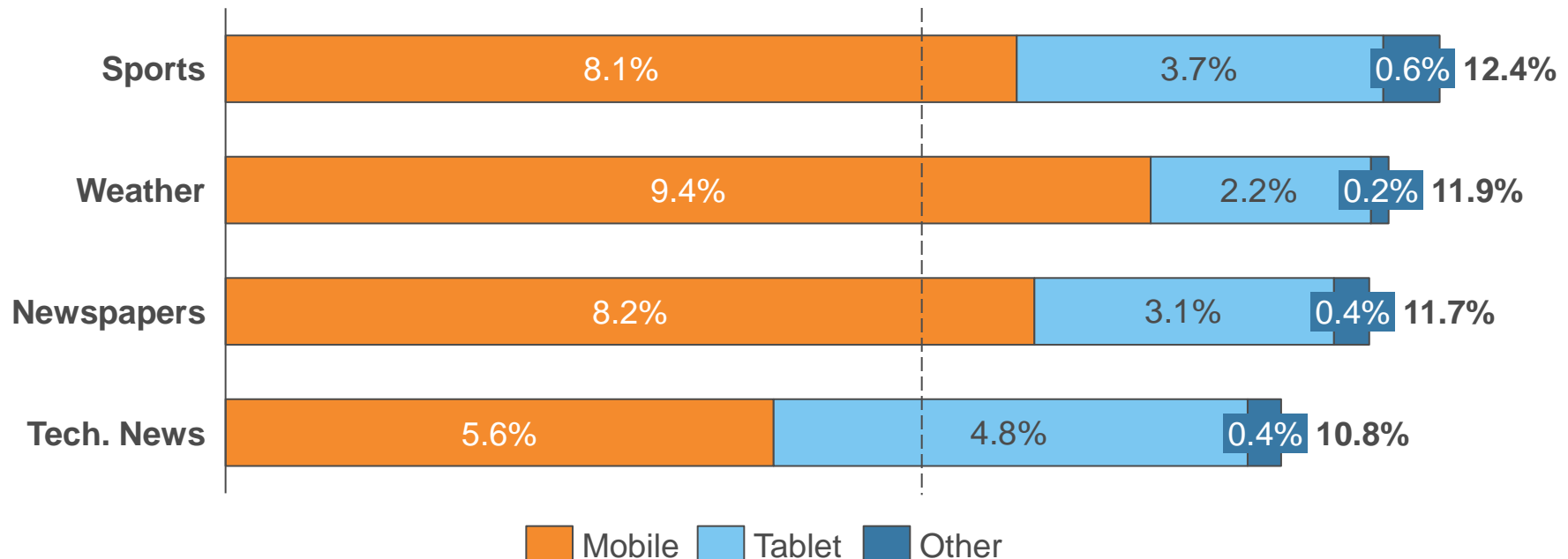
Consumers of tech. content may be more likely to be **early adopters** or heavy users of new technologies such as tablet devices

Connected Device Access of Content

Source: comScore Device Essentials, October 2011

non-PC device share of Total Internet

7.1%



...however, different devices are used to serve unique and particular needs/interests.

Device Type Content of Interest

Source: comScore Device Essentials, October 2011

PC Top Content Areas

1. E-mail
2. Online Gaming
3. Kids/Family
4. Portals
5. Directories

Mobile Top Content Areas

1. Weather
2. Newspapers
3. Sports
4. News
5. Regional/Local

Tablet Top Content Areas

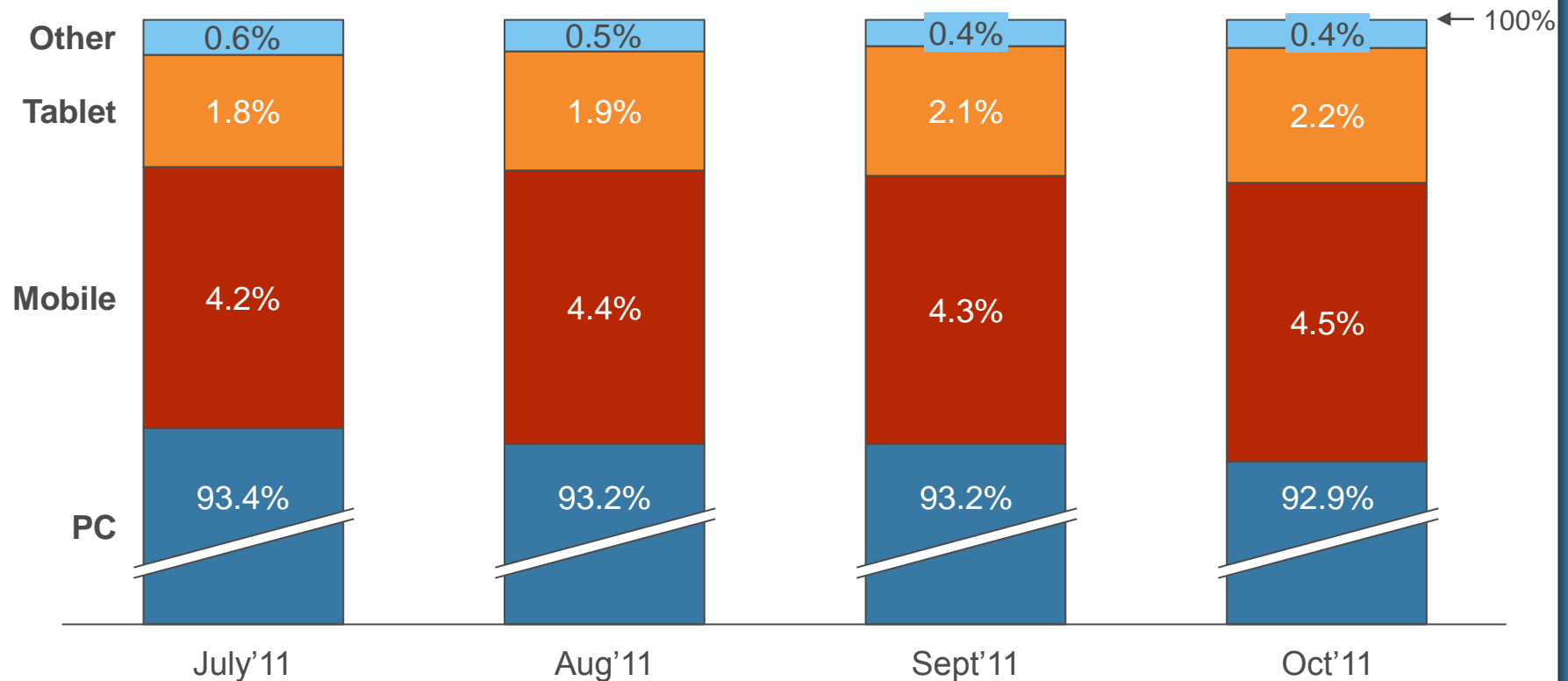
1. Technology News
2. Resources
3. Community
4. Automotive
5. Sports

Top Content = highest indexing content

Trended View of Device Share – Total US

Trended view of Device Share – Total US

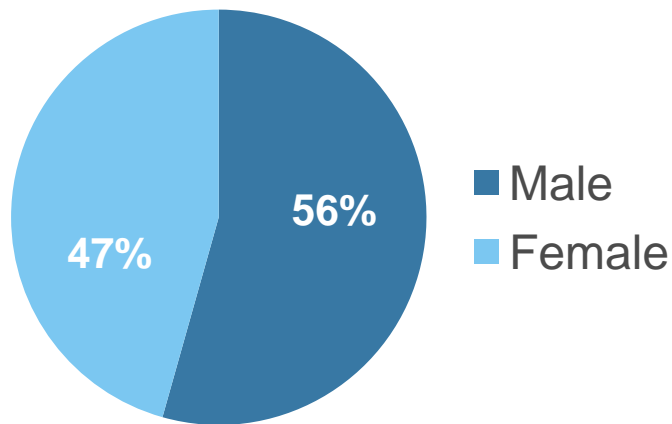
Source: comScore Device Essentials, October 2011



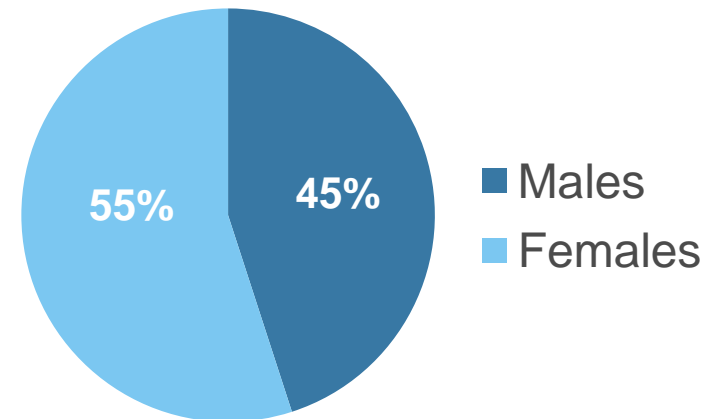
WHO are the Mobile Consumers on the Web?

Males and Females both are heavy Mobile Device users....

**98MM Total
Smartphone Users**

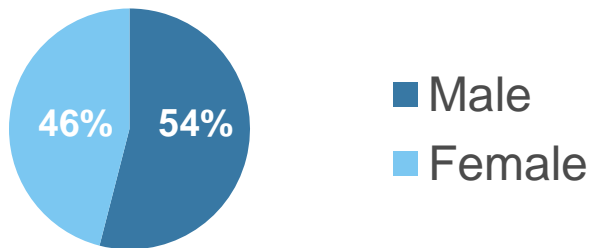


**57MM Total
Tablet/eReader
Users**

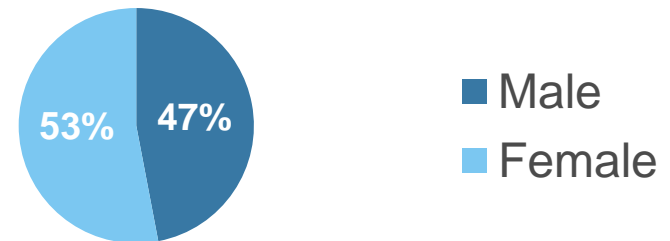


...but the devices they use can differ greatly

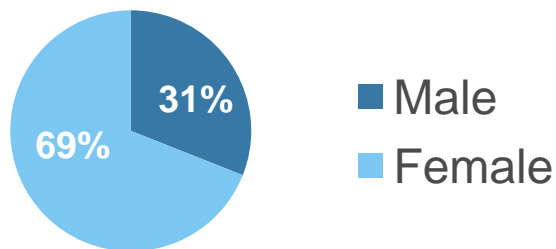
14.7MM iPad Users



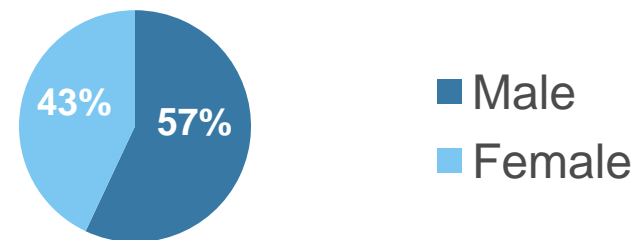
13.2MM iPod Touch Users



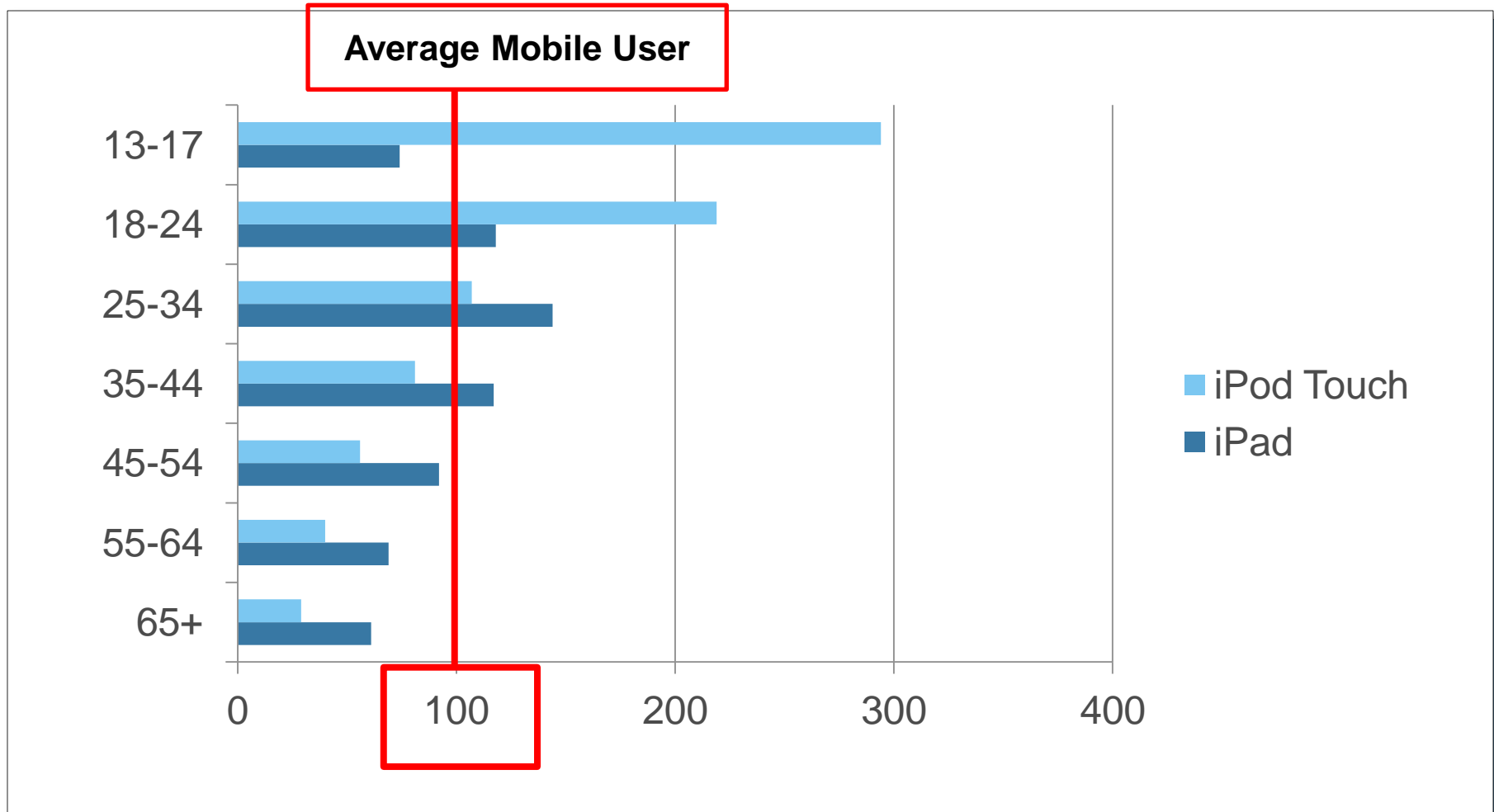
5.4MM Nook Users



4.5MM MSFT Smartphone Users



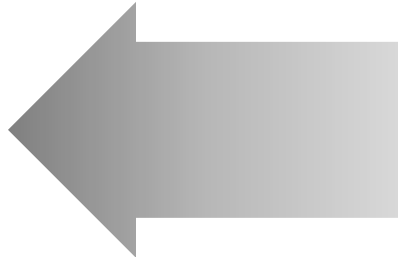
Age Gaps also come into play by device



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Mobile Search is at the Center of the Revolution



Mobile Search Influences Mobile Shopping

63% of people have changed the way they gather information

75% say mobile search makes their lives easier

32% say they use mobile search more than desktop search

49% of mobile searchers made a mobile purchase

Performics & ROI Research 2011 Mobile Insights Study (March 2011)

Mobile Search is Critical to Driving In-Store Traffic & Initiating Leads



40% of mobile searches are local



After looking up a business on a smart phone:

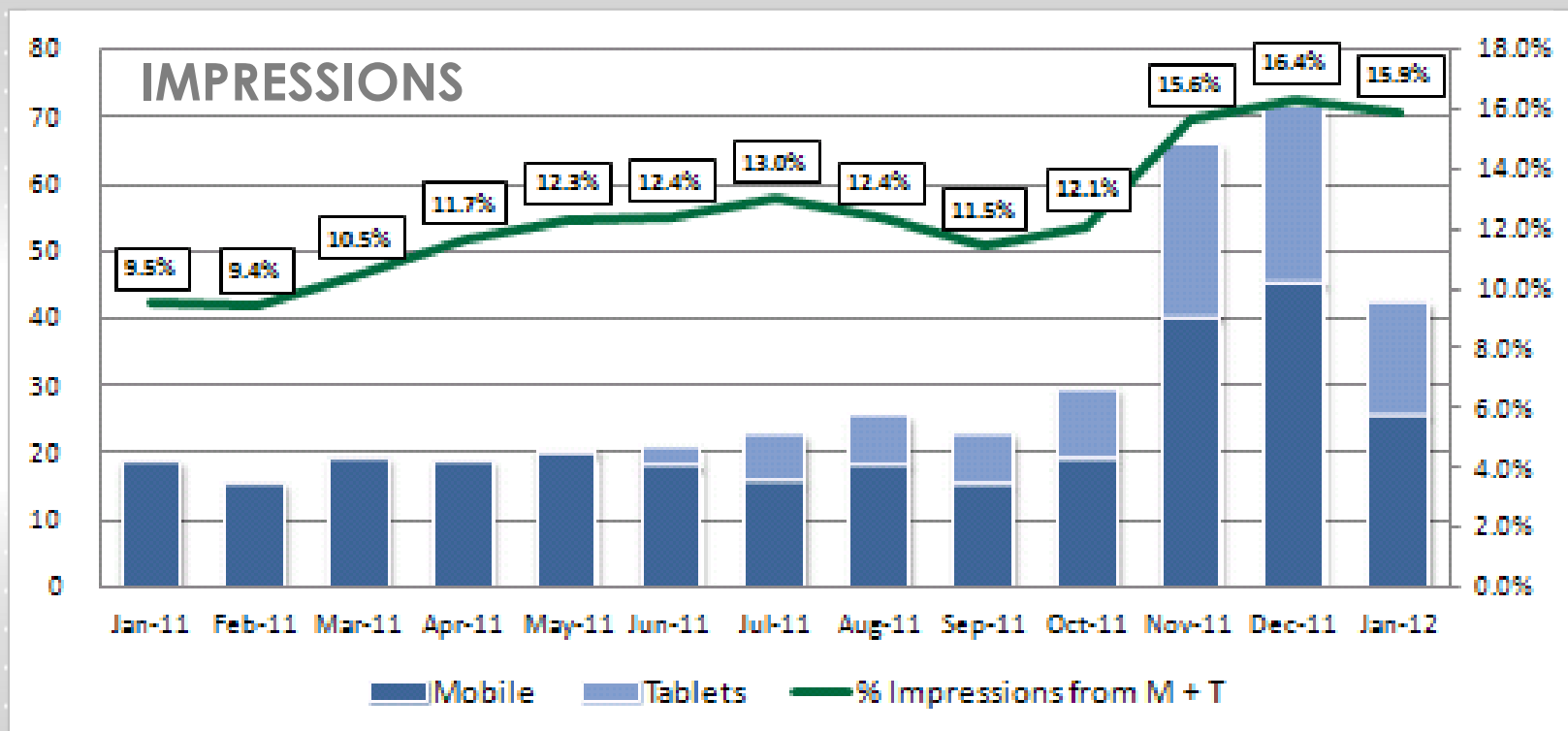
61% of users call the business

59% visit the location

Google; Performics & ROI Research 2011 Mobile Insights Study (March 2011)

Mobile Paid Search Impressions Continue to Rise

Mobile paid search impressions on Google **peaked at 16.4% in Dec. 2011, the highest of all-time**

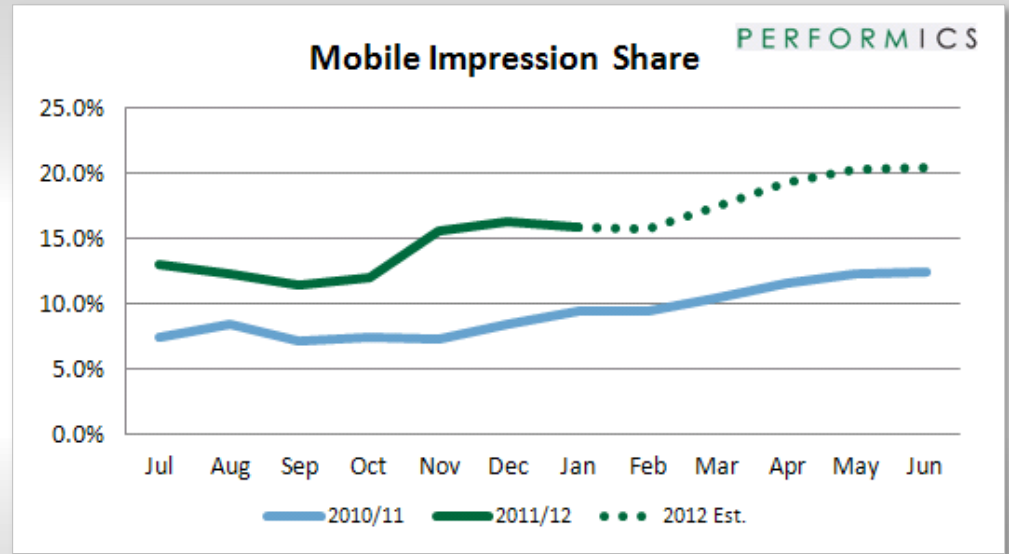


Impressions remained high in Jan. 2012,
at **15.9% of all paid search impressions**

For the last 3 months, tablets were
38% of all mobile impressions

* Based on Performics' aggregate client base; Google AdWords (Content & Search Partners excluded) (Feb. 2012)

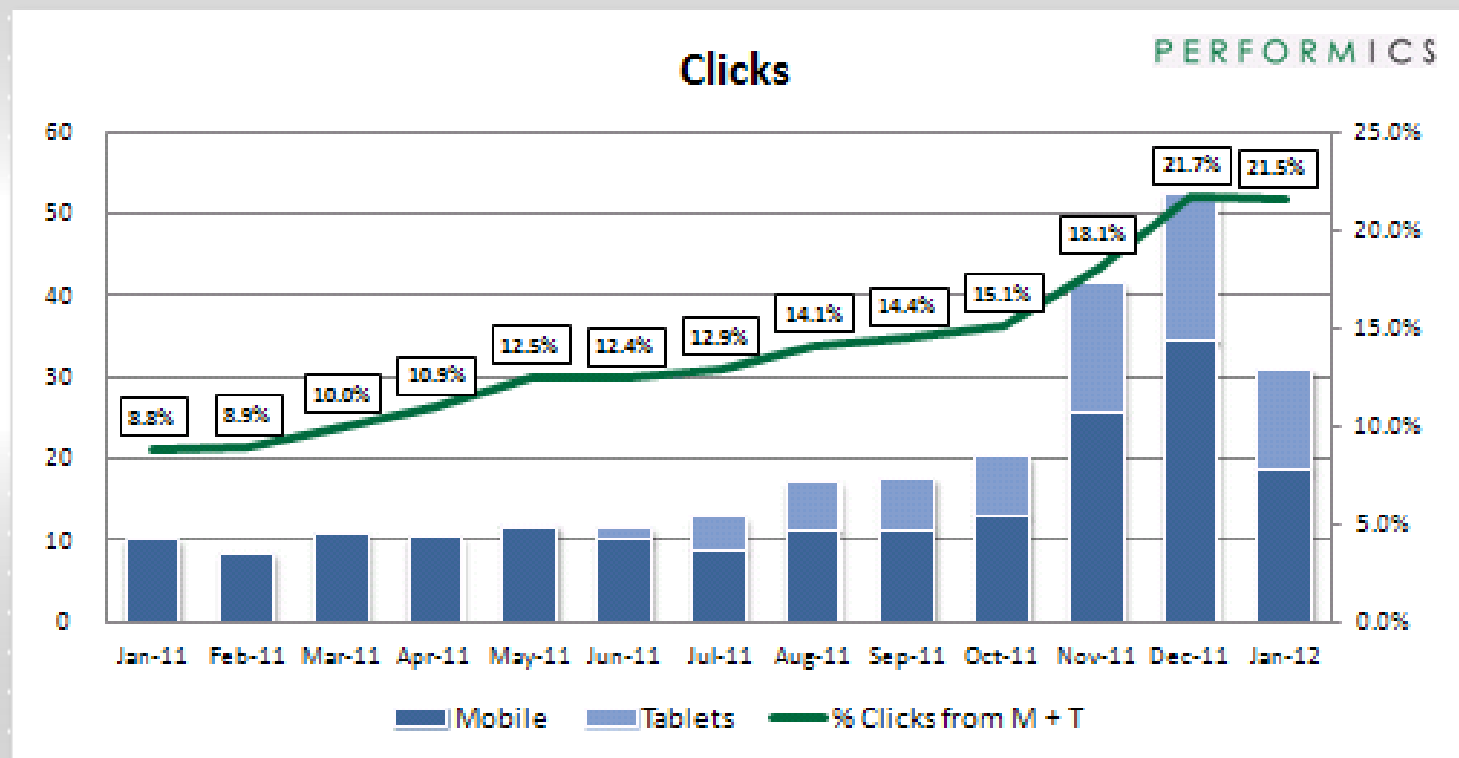
We predict that mobile will make up **20%** of all paid search impressions by summer 2012



* Based on Performics' aggregate client base; Google AdWords (Content & Search Partners excluded)
(Feb. 2012)

Mobile Paid Search Clicks Relentlessly Gain Share

- In 2011, mobile clickshare rose every month, **peaking in Dec. at 21.7%**
- In Jan. 2012, **mobile was 21.5% of all clicks**



* Based on Performics' aggregate client base; Google AdWords (Content & Search Partners excluded) (Feb. 2012)

Tablets Have Driven Recent Clickshare Growth

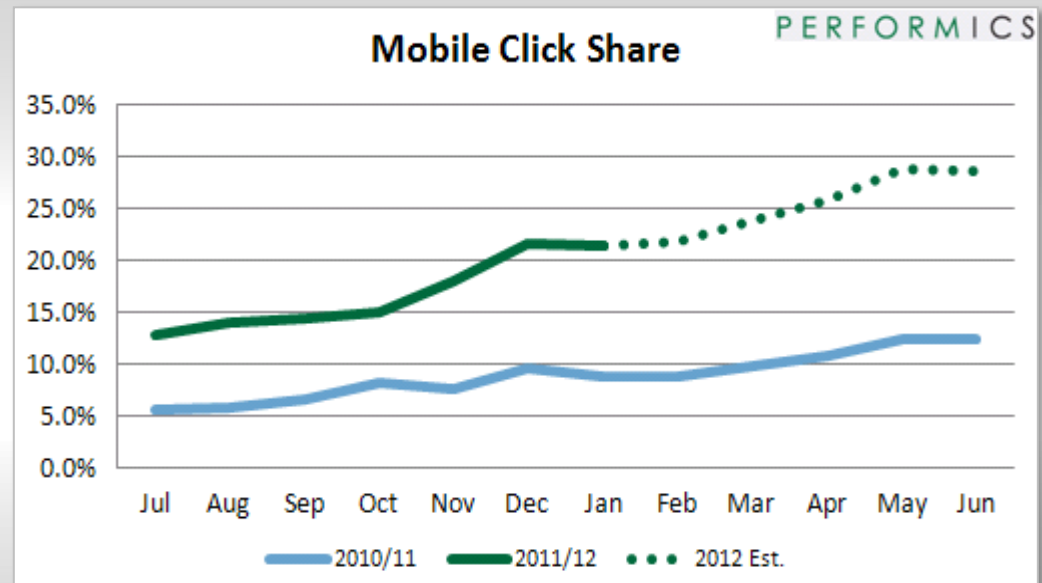


Search is the second-most popular Activity on tablets (after gaming)

Tablet share of mobile clicks was 39.6% in Jan. 2012, **a 14.8% jump from December.** The increase could be due to the popularity of tablets as gifts during holiday 2011.

* Based on Performics' aggregate client base; Google AdWords (Content & Search Partners excluded) (Feb. 2012); Google (3/11)

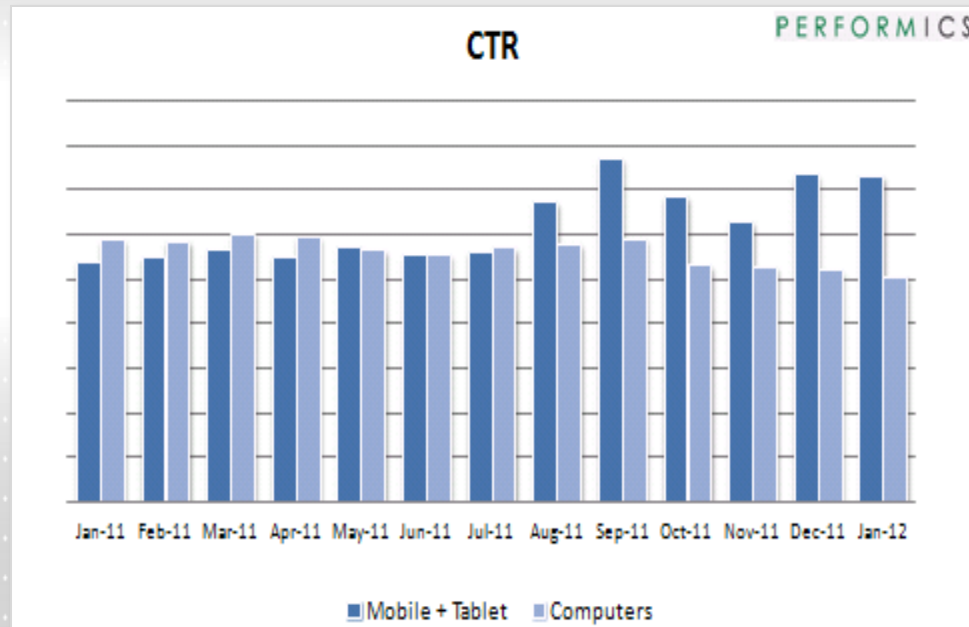
We project that mobile clickshare will rise to 28% by summer. The release of the iPad 3 & additional Android tablets will help make this a reality.



* Based on Performics' aggregate client base; Google AdWords (Content & Search Partners excluded) (Feb. 2012)

Mobile CTRs Hold Lead Over Computers

- In Aug. 2011, mobile CTRs shot above computers and haven't looked back
- In Jan. 2012, **mobile CTRs were 45% higher than computers**
- 2 factors have contributed to this:
 - (1) the popularity of tablets, which have always had good CTRs
 - (2) unprecedented decreases in computer CTRs over the last few months

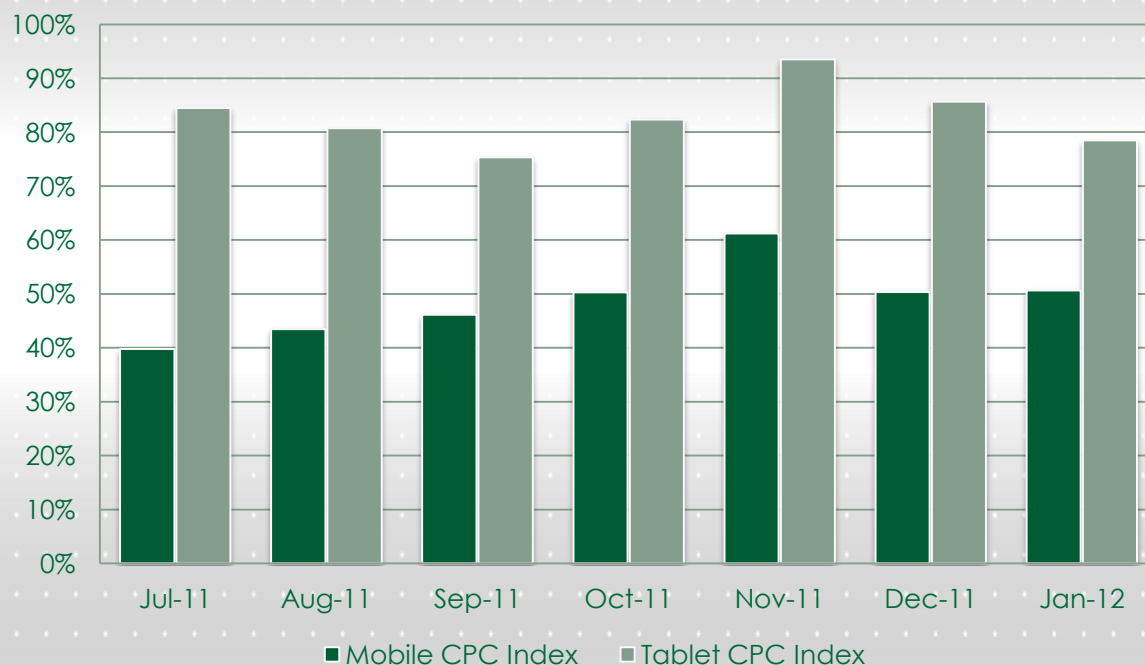


* Based on Performics' aggregate client base; Google AdWords (Content & Search Partners excluded) (Feb. 2012)

Despite Growth, Mobile Paid Search Is Still a Bargain

- Smartphone CPCs remain **about 50% less than desktop CPCs**
- Tablet CPCs are catching up to desktop **at about 20% less**

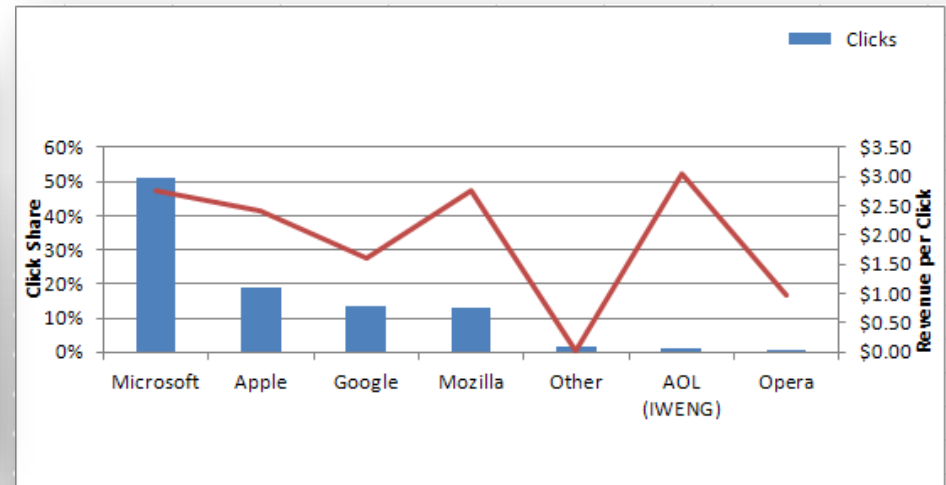
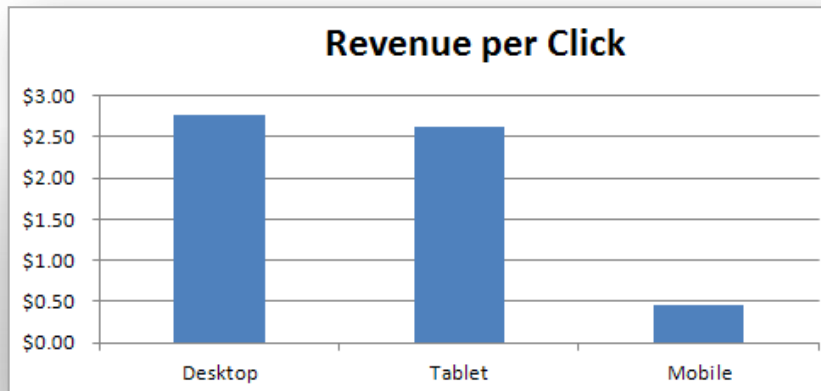
Mobile CPCs (Indexed against Computers)



* Based on Performics' aggregate client base; Google AdWords (Content & Search Partners excluded) (Dec. 2011)

Browser Types & OS Should Influence Your Strategy

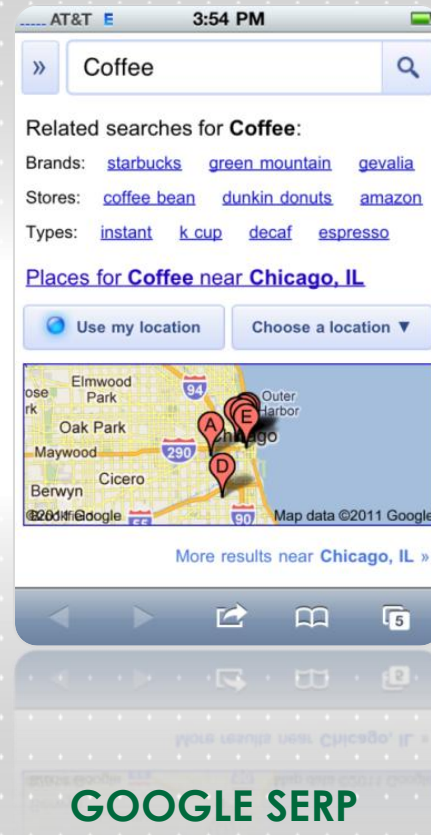
- Build mobile experiences for tablets (iPads) but strategically invest ad dollars into top performing browser platforms (Firefox & AOL) where conversions/revenue is high
 - Apple has the second highest click share (Safari + iPad + iPhone) and we anticipate continued growth
 - AOL's browser drove more revenue than iPhone or Android



Advertisers can also increase visibility
through mobile organic search,
but face some challenges ...

Organic Mobile Search is Splintered

- Searchers are **tapping** through SERPs and dedicated maps platforms
- Using succinct queries (**40%** with local intent)
- Across **different** platforms
- Yielding a **blend** of traditional results and highly localized results



The image displays a dense collection of logos from various companies, primarily in the technology and media sectors. The logos are arranged in a grid-like fashion, with some larger and more prominent than others. Two large, light-grey arrows originate from the right side of the logo collage and point towards the right edge of the image. The first arrow points to a stylized map icon featuring a yellow road, a red location pin, and a blue shield with the number '280'. The second arrow points to a black smartphone screen. The screen shows a search interface with the word 'Coffee' in the search bar. Below the search bar, there are sections for 'Related searches for Coffee:', 'Brands:' (listing Starbucks, Green Mountain, Gevalia), 'Stores:' (listing Coffee Bean, Dunkin' Donuts, Amazon), and 'Types:' (listing Instant, K-cup, Decaf, Espresso). A section titled 'Places for Coffee near Chicago, IL' includes a map with several red location pins and a list of nearby areas like Oak Park, Maywood, Cicero, and Benwyn. The phone's status bar at the top shows 'AT&T', 'E', and the time '3:54 PM'.

So What Are We Going to Do About It?

Provide you with 5 essential strategies to ensure your smartphone and tablet campaigns are connecting to and engaging your participant

Participant Insights

Different Devices = Different Strategies

Tablets

Distinctively Optimize

Smartphones

Govern the Small SERP

Landing Pages

Keep it Simple

SEO

Focus on Local

Different Devices = Different Strategies

- **Smartphone Nuances:**
 - Your “constant companion”
 - 59% use smartphones while shopping/errands
 - Product reviews/comparisons
 - Looking for a store location, phone #
 - Social recommendations & deals, geo check-ins and click to call
- **Tablet Nuances:**
 - Your “couch companion”
 - 70% watching TV while using tablets
 - At night, in bed
 - With their families

Situations in Which Tablet, Ereader and Smartphone Owners Use Their Devices, Q1 2011

% of respondents

	Tablet	Ereader	Smartphone
Watching TV	70%	35%	68%
Lying in bed	57%	61%	51%
With friends/family	44%	17%	58%
Waiting for something	42%	32%	59%
In the bathroom	25%	17%	28%
Attending a meeting/class	24%	10%	23%
Shopping/running errands	21%	9%	59%
Commuting	20%	11%	47%
Other	35%	39%	50%

Source: The Nielsen Company, "Q1 2011 Mobile Connected Device Report" as cited in company blog, May 19, 2011

128586

www.eMarketer.com

Think about the optimal time for smartphone & tablet buys, times to push bids, and what your customers are doing when they see your message. On tablets, they're relaxing; on smartphones they're running around town

Different Strategies = Unique Campaigns

- Separate campaigns guarantee stronger results
 - Mobile-only campaigns perform **11.5%** better on average than hybrid desktop-mobile campaigns (per Google (2011))

1



2



3



Tablet Paid Search Strategies

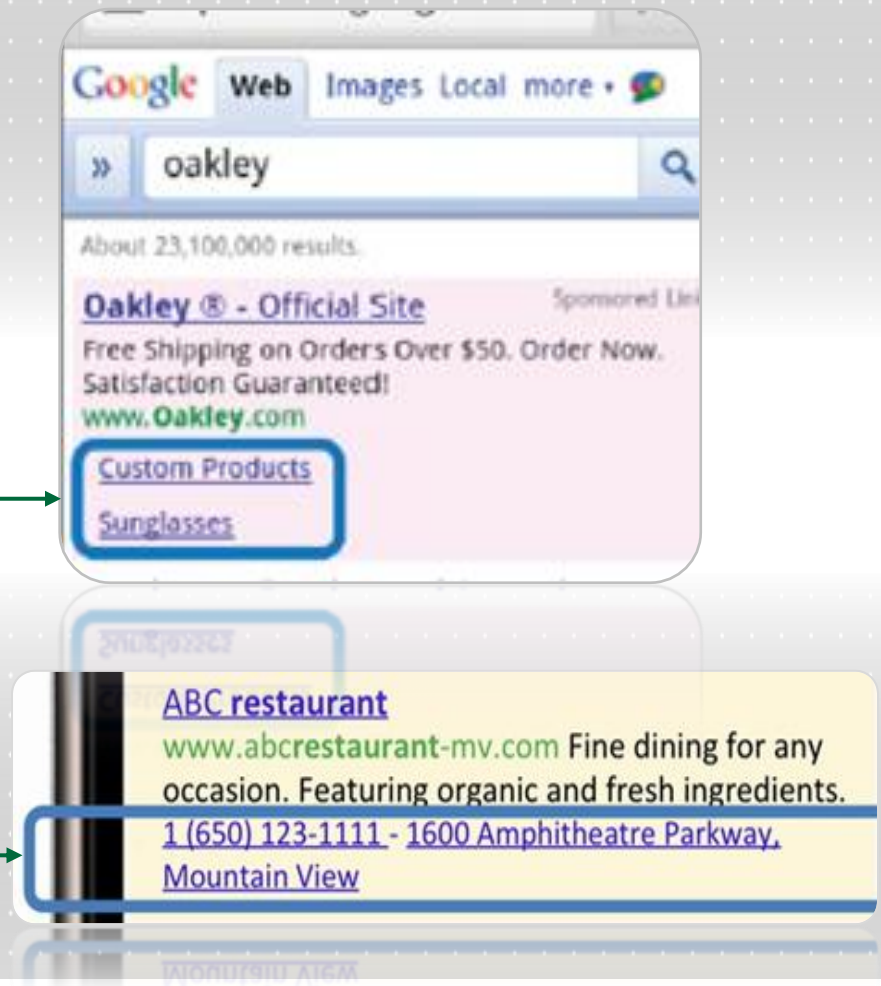
- **Bid**
 - Because tablet users can scroll with a gesture, they're more likely to peruse search results and click further down the page
 - Adjust bid strategy accordingly
- **Copy**
 - Gear copy & sitelinks to tablet users (i.e. "purchase now from your tablet")
 - Most people use tablets when they're on the couch, in bed or around the house in evenings; unlike smartphones when they're on-the-run
- **Keywords**
 - Because tablet searchers have different needs, they use different keywords
 - Create tightly-themed ad groups per device
- **Landing Pages**
 - Tablet screen size & browsers are more like desktops than smartphones
 - Drive tablet traffic to desktop or tablet-specific landing pages
 - Avoid Flash (iPad doesn't render Flash)

Smartphone Paid Search Strategies

- The small mobile SERP is much easier to dominate than desktop

5 Steps to Dominance:

1. Bid for positions 1 or 2
2. Take up nearly $\frac{1}{4}$ of page by adding sitelinks
3. Location extensions, hyper local formats or offers
4. Click-to-call/click to download
5. Optimize for natural search



Mobile Paid Search Landing Pages

- **Simplicity**

- Keep site layout simple
- Use minimalistic, clean code
- Keep images scarce
- Simplify conversion path

- **Usability**

- Optimize navigation with touch-friendly elements
- Limit scrolling to one direction
- Avoid pop-ups
- Avoid Flash and javascript
- Avoid redirects

- People are **51%** more likely to purchase from retailers that have mobile-specific websites

- Web retailers could increase engagement by **85%** with a mobile-specific website

Mobile Experience

1. **Build a mobile version of your site or use CSS to feed mobile content to users**
2. **Leverage your native site's current search visibility by way of either CSS or canonical tags plus user agent redirection**
3. **Keep mobile pages succinct, lean, and fast**
4. **Ensure local information is readily and easily available**
unique mobile features like location detection and filtration
5. **Avoid using pixel and absolute rendering; use percentage or relative instead**
6. **Provide users an opt-out of the mobile experience to access your full native site**
7. **Use an easy, fast payment system to secure conversions**

Mobile & Local SEO

- **Optimize** mobile site hierarchy & user experience to guide conversions
- **Leverage** traditional site SEO efforts to increase visibility across platforms
- **Generate** new, qualified traffic from mobile and local keywords
- **Deliver** relevant local results across search and map listings



Thank you!

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