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# B2B Trends in Mobile & Online Video

Google/Forbes Insights  
U.S., 2010

# Background and Objectives

## Background

- **Mobile has exploded and continues to grow.** Because of this phenomenon, a great deal of research has been conducted about how mobile devices are changing the way people communicate. But little has been done to understand what the impact of this shift has been on executives in the B2B space.
- Additionally, **online video has become a critical part of the Internet mix** over the past 18-24 months, as executives are transforming their Web habits to be more open to video.

## Objective

- Understand how the growth of mobile devices & online video impacts the executive suite in the B2B space.

# Study Methodology

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**Methodology:** Survey of 306 executives at U.S. companies, sales of \$500M+

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**Timing:** Survey conducted in September and October 2010

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**Quantitative  
Sample:**

- 58% C-level executives, including CEO (20%), CFO (6%), CIO, CMO and other C-level titles
  - 42% were senior level titles including SVP, VP, Director
  - A broad swath of functions included executives from general management, business operations, IT, finance, and more
- 

**Qualitative  
Sample:**

- One-on-one interviews conducted with 9 top-level execs
- Provided more information on particular actions identified in quantitative portion of survey
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Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010

# Part I: B2B Mobile Trends Overview

1

## Smartphones as Digital Companions

On average, C-Suite executives carry and use 4+ web-enabled devices

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2

## Taking Care of Business on Mobile

Execs searched more on mobile in 2010 than on desktops in 2009

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3

## B2B Execs Use Mobile Ads, Apps & Tweets

Over half of senior executives notice and click on mobile ads

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4

## A Future of Unprecedented Connectivity

Within 3 years, 44% of execs expect a smartphone or a tablet to be their primary device for business

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# Legend

**Smartphone With  
Full HTML Browser**  
(i.e., Droid, iPhone)



**Internet Enabled  
Smartphone**  
(i.e., Blackberry)



**Tablet**  
(i.e., iPad)

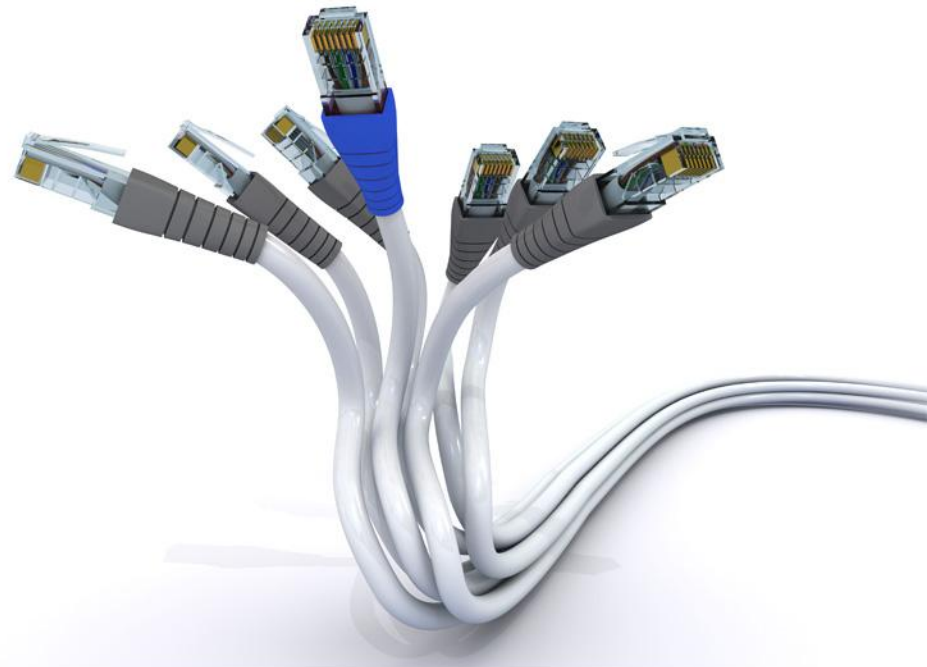


**WAP Phone**  
(i.e., Razor)



# Smartphone as Digital Companions

Business Executives rely on various devices and are always plugged-in and connected



# Today's Executives Are Digitally Dating

“Wherever I go, I always carry a Blackberry – and just in case, an iPhone. And if I’m on the road, which is at least half the time, you can add an iPad and a laptop – I always have both.”

– Loren Ridinger  
*SVP and co-founder, Market America*

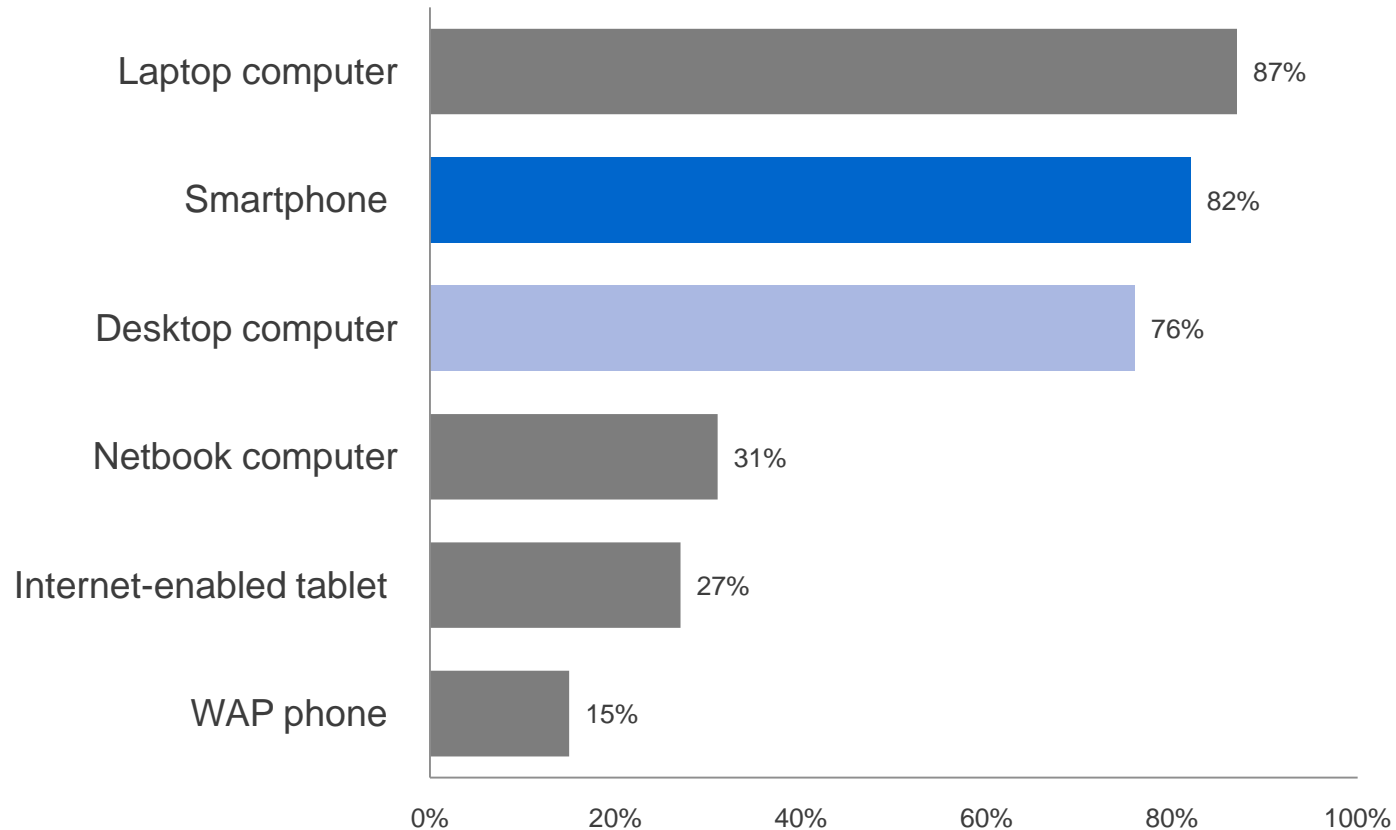


Source: Google and Forbes Insights “B2B Trends in Mobile & Online Video Study” December 2010



# Smartphones are Taking The Lead

## More Executives Use A Smartphone Than A Desktop

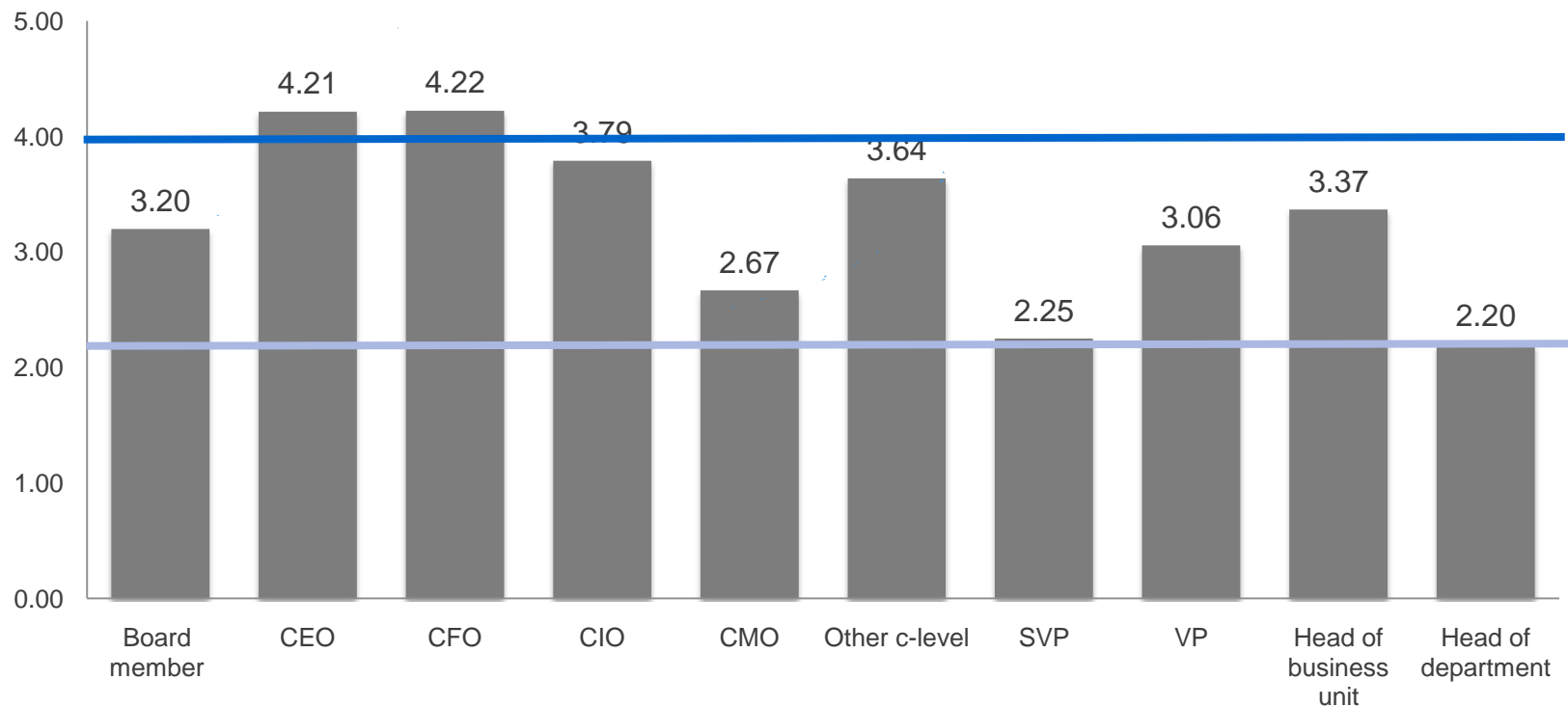


Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010  
Q. Which devices do you use for business purposes today?

# No Longer A Computer For Information, A Phone For Conversation

**C-Suite averages 4+ devices; All other executives 2.28 devices**

Average number of devices used for business purposes (by job title)



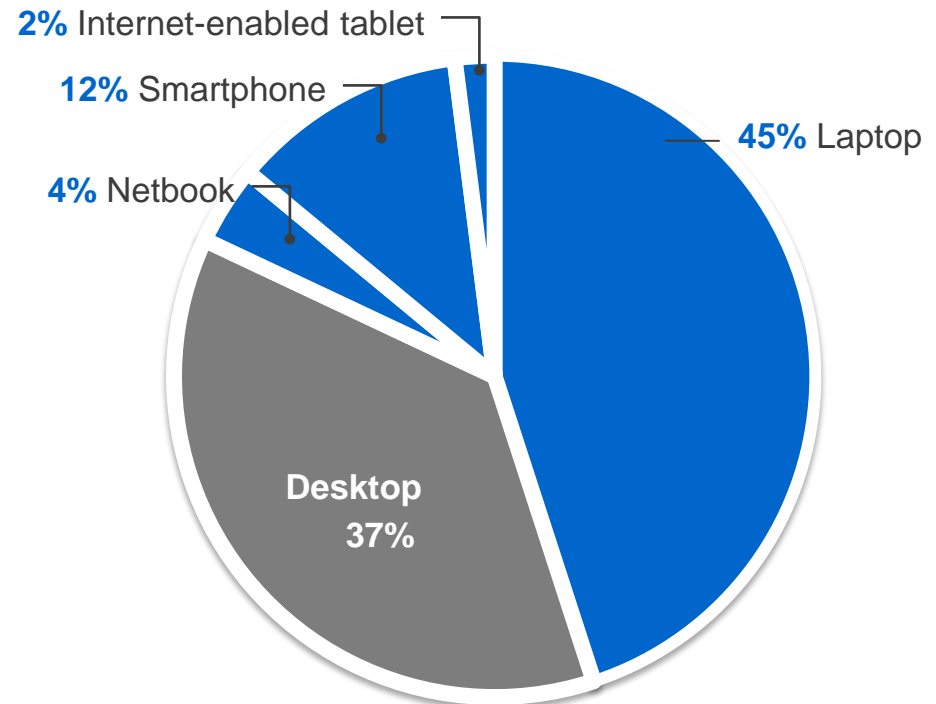
Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010  
Q. Which devices do you use for business purposes today?

# Computers Used Most; But Mobile Is Ubiquitous

Executives today are still using **computers most frequently** at 86%



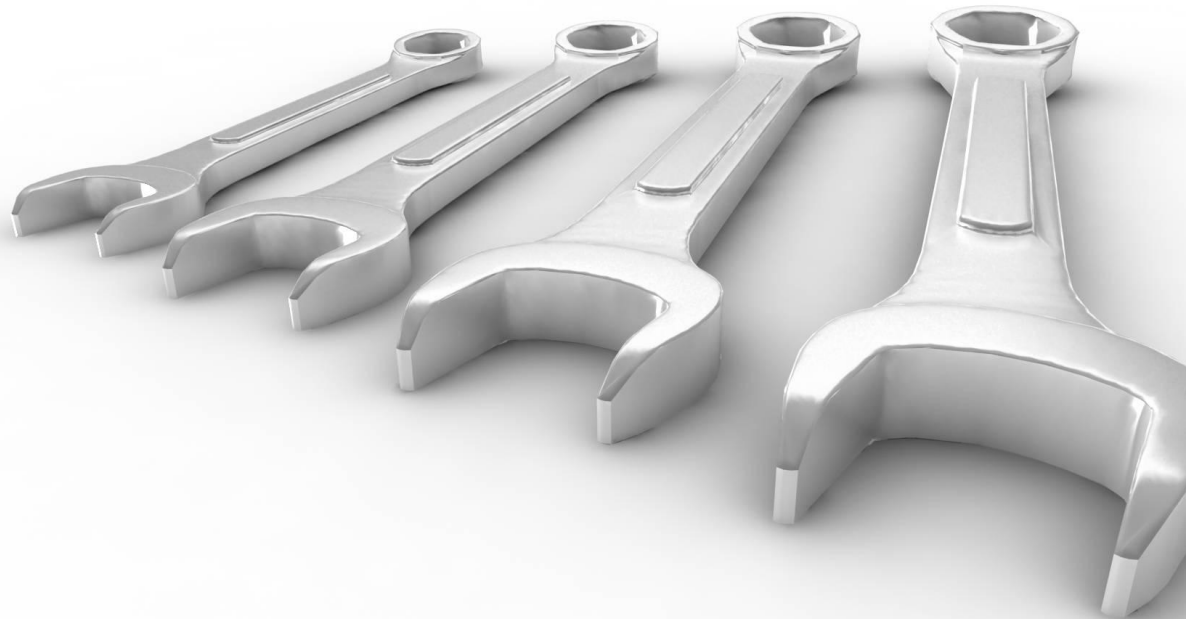
But, if we exclude the stationary desktop, **63% of executives most frequently use devices that they can take on-the-go!**



Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010  
Q. Which device do you use most frequently for business purposes today?

# Taking Care of Business on Mobile

Marketers are using the mobile web to search & purchase for business



# Instant Access Is Important To B2B Marketers

Mobile connects us anytime and anywhere

“At the end of the day, we’re only  
as good as the quality, accuracy  
and speed of our decision making.”

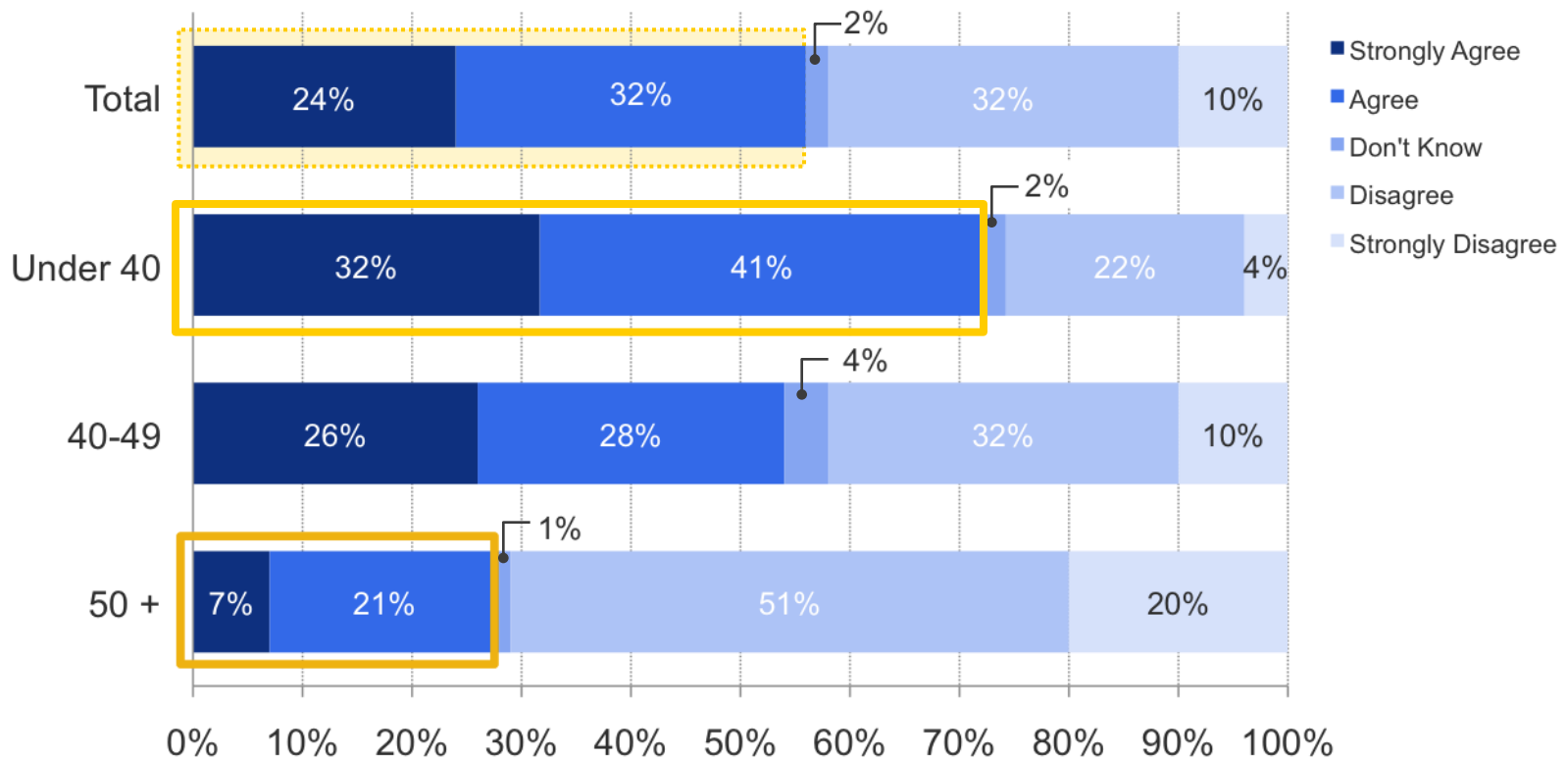
– Mike Hedges  
C/O, Medtronic



# Mobile Drives Business Communication

The primary communications tool for 56% of executives

My mobile device is my primary business communications tool



Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010

Q: My mobile device is my primary business communications tool; strongly agree, agree, don't know, disagree, strongly disagree

# Mobile Also Drives Business Transaction

**79%**

of execs are comfortable providing business contact information to a mobile website

**65%**

are comfortable making a business-related purchase on a mobile device

**59%**

would rather make a business-related purchase over the mobile web than over the phone

Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010

Q: I am comfortable providing business contact information to a mobile website; I am comfortable making a business-related purchase on a mobile device; I would rather make a business-related purchase over the mobile web than over the phone.  
(strongly agree, agree, don't know, disagree, strongly disagree)

# Execs Perform **More Mobile Searches Today** Than PC Searches A Year Ago

## 2009

Average number  
of searches per  
day on a PC

6



## 2010

Average number of  
searches per day on  
a mobile device

7



Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010  
Q: On average, how many work-related searches do you conduct with a search engine each workday using a desktop, laptop or netbook computer? A mobile phone, smartphone, tablet, other mobile device?



# Generational Shift Impacts Mobile Usage

## Age 50+

Digital Immigrants



Speak digital  
but think analog

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**Most set in their  
ways regarding  
device usage:**

They allow the task to  
drive the device

## Age 40-50

Digital Settlers



First to send  
email, build  
websites, use  
cellphones and  
BlackBerries

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**Comfort on a  
smartphone:** but more  
often consume content  
than create it

## Under 40

Digital Natives



There was  
life before  
computers and  
smartphones?

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**Emerging  
device agnostics:**  
As likely to use a mobile  
device as they are a  
computer for many tasks

Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010

# B2B Execs Use Mobile Ads, Apps & Tweets

How to reach business  
executives through mobile



# Executives Notice & Click on Your Ads



Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010

Q1: Do you notice advertising on your mobile device. Q2: Do you use or click on mobile paid search results to gather business information? Q3: Do you use or click on mobile Web ads to gather business information?

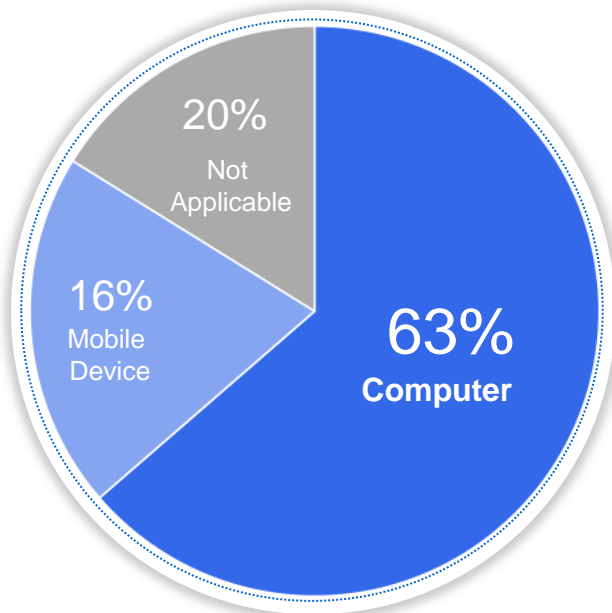


# But There is a Bigger Mobile World to Consider

For those executives who post to...

## Work Related Social Media Sites

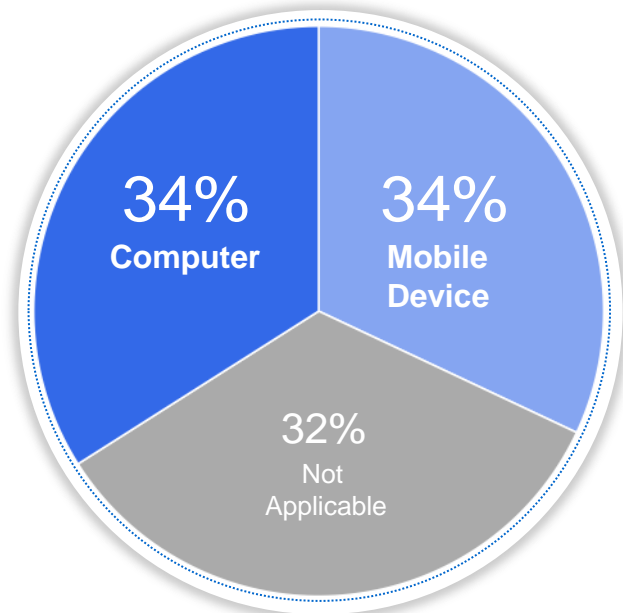
**3/4 prefer** using their **computer**



## Twitter

**1/2 prefer** using their **mobile device**

**1/2 prefer** using their **computer**



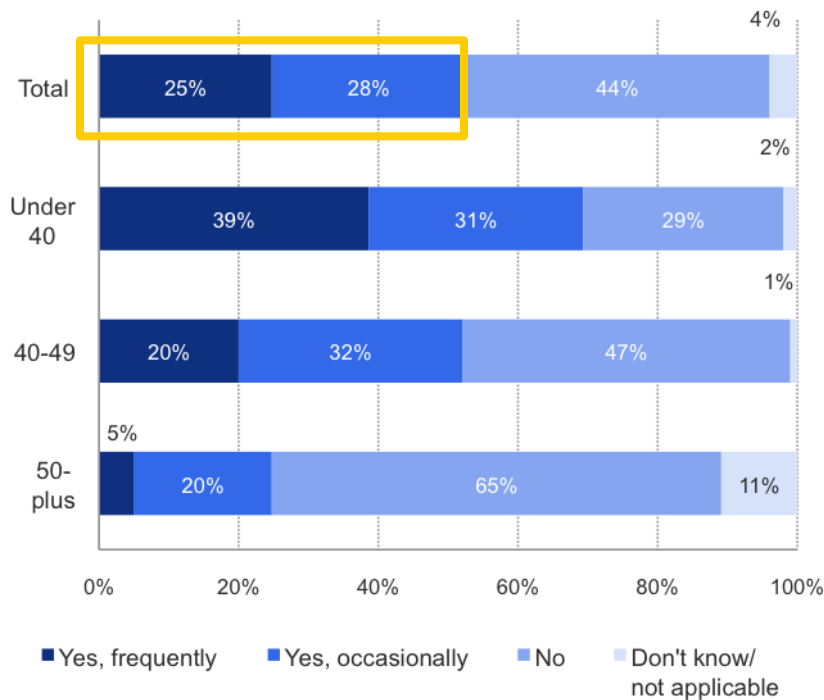
Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010

Q: Device preferred for posting to work-related social media site; Computer, Mobile Device, Not applicable

Q: Device preferred for posting to Twitter or similar feed; Computer, Mobile Device, Not applicable

# Executives Find Value in Mobile Business Apps

**53%** of executives **download & run branded B2B mobile apps**



Executives are **positively influenced by sponsored B2B Mobile Apps**; Especially Younger Executives Under 40

**37%** of all executives agree

**47%** of executives under 40 agree

**16%** of executives 50+ agree

Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010

Q: Do you use or click on sponsored B2B mobile apps to gather business information? (yes frequently, yes occasionally, no, don't know/not applicable)

Q: Mobile apps from my vendors positively influence my decision to work with them (describes extremely well, describes somewhat well, neutral)

# A Future Of Unprecedented Connectivity

It's not too late to be early!





# The Future is Mobile

“Living my life on the road and today having to carry a (phone, a tablet and a laptop), I’m looking forward to a future of as few devices as possible.”

– Chris Justice  
*President, Ingenico*



# Executives Will Adopt Highly Evolved Devices

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**80%** of execs under 40 **prefer accessing work-related emails from their mobile devices** as opposed to a computer, when they are **home**

**44%** of executives under 40 **agree that because of their smartphones, they no longer carry a laptop when they are out of the office**

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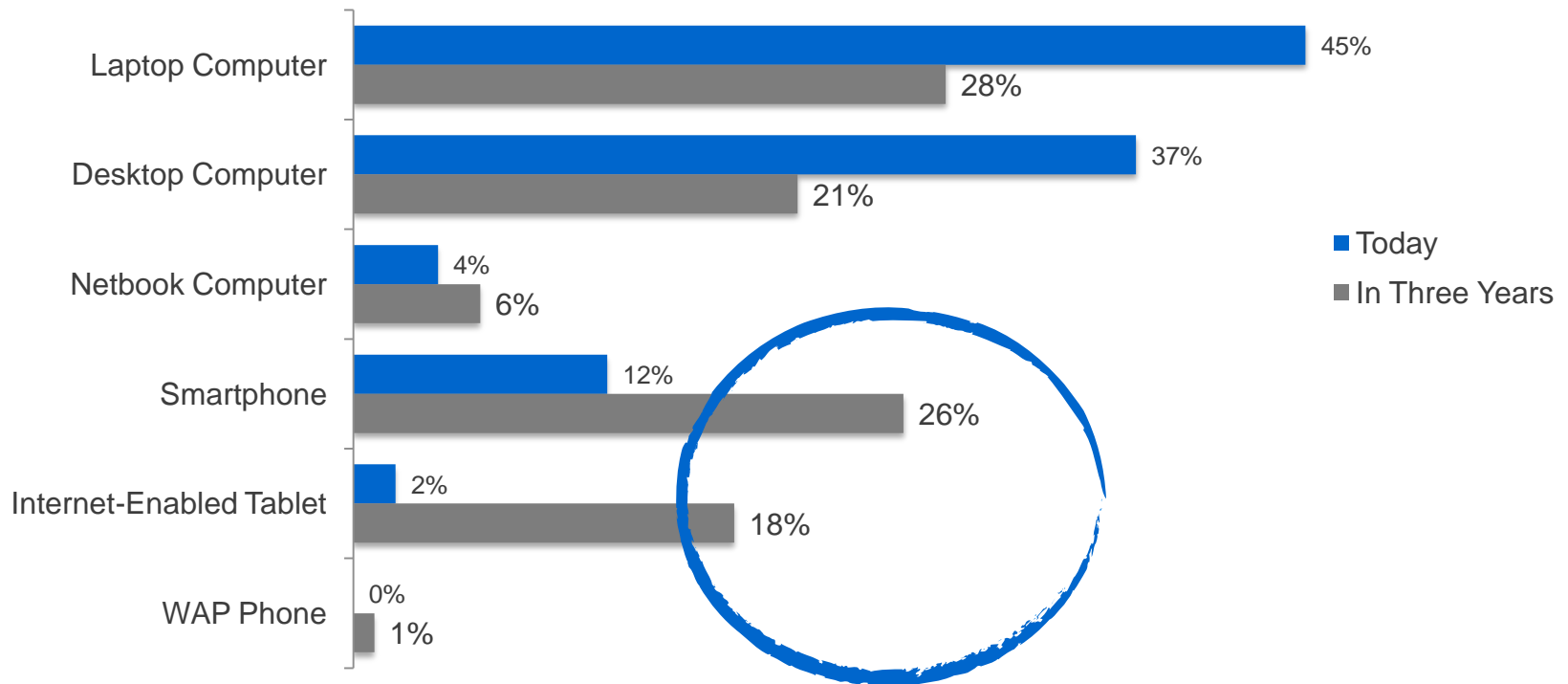
Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010  
Q: When I am at home, I prefer to access work-related email and information from my mobile device than from my home computer. (strongly agree, agree, disagree, strongly disagree, don't know)  
Q: Because I have a smartphone, I no longer carry a laptop computer when I am not in the office. (strongly agree, agree, disagree, strongly disagree, don't know)



# Mobile Will Grow; At The Expense Of Computers

## With Smartphones & Tablets Taking The Lead

Within 3 years, **44%** expect a **smartphone or tablet** to be their **primary device for business-related use**



Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010  
Q. Which device do you use most frequently for business purposes today? Which device do you believe you will use most frequently for business purposes three years from now?

# Developing Your B2B Mobile Playbook

## Mobile Strategy is Now a B2B Marketer's Must Have

Mobile usage is nearly ubiquitous amongst execs

57% of execs notice mobile ads, 56% click on them

Break out a separate mobile search campaign to better optimize for mobile

## Social is Imperative to a Mobile B2B Strategy

Half of B2B tweets happen on mobile

83% of execs are already posting to business related social media sites

Incorporate innovative ad formats to respond to their changing needs and keep them engaged

## Take Advantage of the Exploding App Market

53% of execs download/use sponsored apps  
Provide valuable B2B content that stays with them wherever they go

Drive downloads of your app using the advertising solutions that work best for you

Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010

# Key Findings

## Smartphones as Digital Companions

- More executives use a smartphone than a desktop for business
- On average, C-Suite executives carry and use 4+ web-enabled devices

## Taking Care of Business on Mobile

- 56% of executives cite mobile as their primary business tool
- 59% of execs prefer to make business purchases on mobile web over the traditional phone
- 65% of executives are comfortable making a business purchase on the mobile web
- 79% of execs are willing to leave their contact information on a mobile website
- Executives perform more searches on mobile in 2010 (7/day) than on desktops in 2009 (6/day)

## B2B Execs Use Mobile Ads, Apps & Tweets

- Over half of senior executives notice and click on mobile ads
- 53% of executives download and run sponsored B2B mobile apps
- 1/2 of executives who post to Twitter prefer using their mobile device

## A Future of Unprecedented Connectivity

- 80% of execs under 40 access work-related emails from mobile devices as opposed to a computer
- 44% of execs under 40 don't carry a laptop when they are out of office, because of their smartphone
- Within 3 years, 44% of execs expect a smartphone or tablet to be their primary device for business

# Part II: B2B Online Video Trends Overview

1

## The Shift Toward A Non-Text Web

83% of execs watch more online video today than they were a year ago

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2

## Video Drives Execs Down Purchase Path

51% of execs under 40 have made a business-related purchase after viewing a video

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3

## Video is Business Social

54% of execs share work-related videos with colleagues at least weekly

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4

## Developing Your Video Playbook

47% of execs prefer videos 3-5 minutes long

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# The Shift Toward A Non-Text Web

Video has become a critical part of the Internet Mix



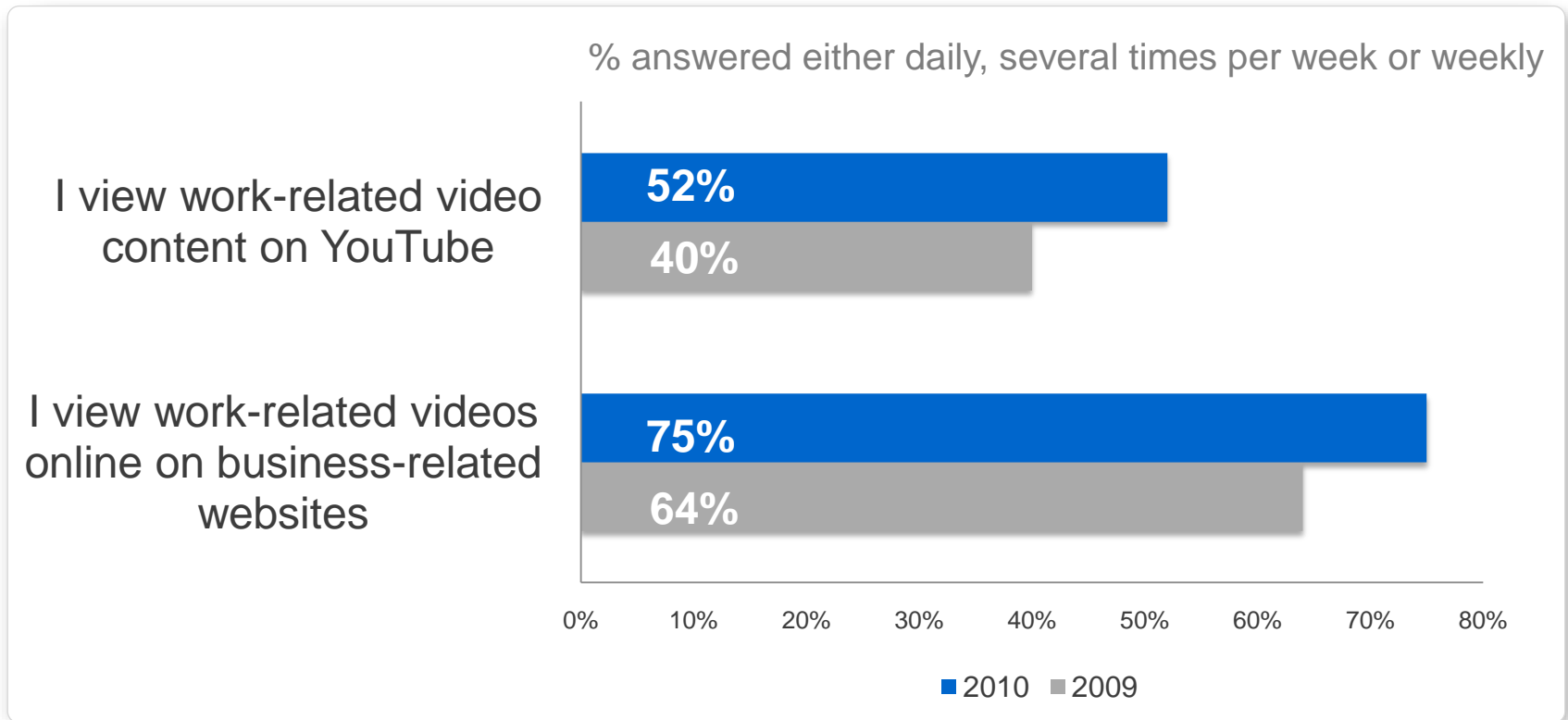
# Executives Are Watching More Video

**83%**

of executives say they  
are watching more online  
video today than they  
were a year ago

Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010  
Q: I watch more online video today than I did a year ago. (Strongly agree, Agree, Disagree, Strongly disagree, Don't know)

# And Doing So With More Frequency



Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010

Q: I view work-related video content on YouTube. (daily, several times per week, weekly, several times per month, monthly or less often, never)

Q: I view work-related video content on business-related websites. (daily, several times per week, weekly, several times per month, monthly or less often, never)

Google Confidential and Proprietary

# Video Drives Execs Down Purchase Path

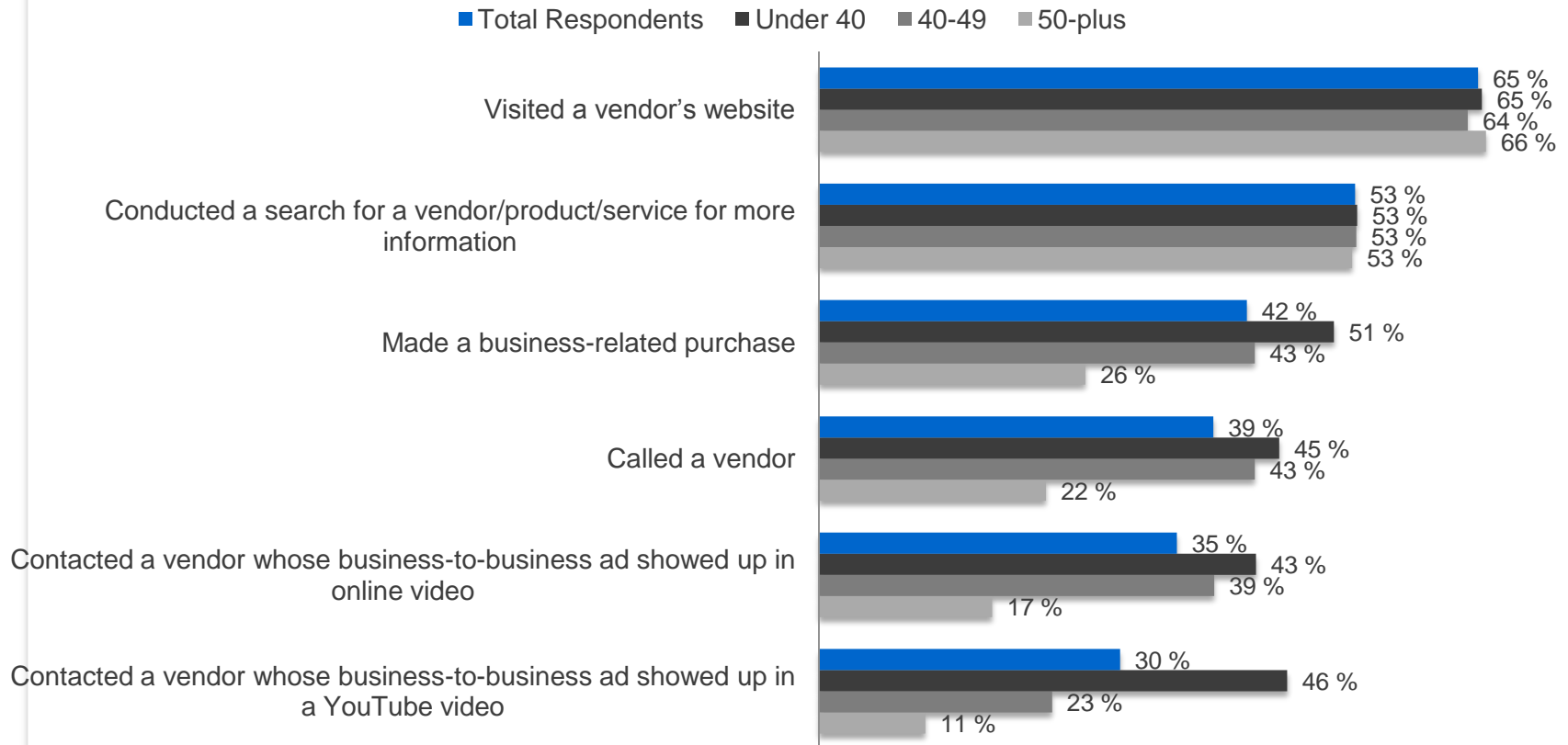
What executives do after they watch  
a business-related video





# Executives Search, Call, Contact & Purchase After Watching A Video

Have you done any of the following after watching a work-related online video?



Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010  
Q: Have you done any of the following after watching a work-related online video?

# Video Is Business Social

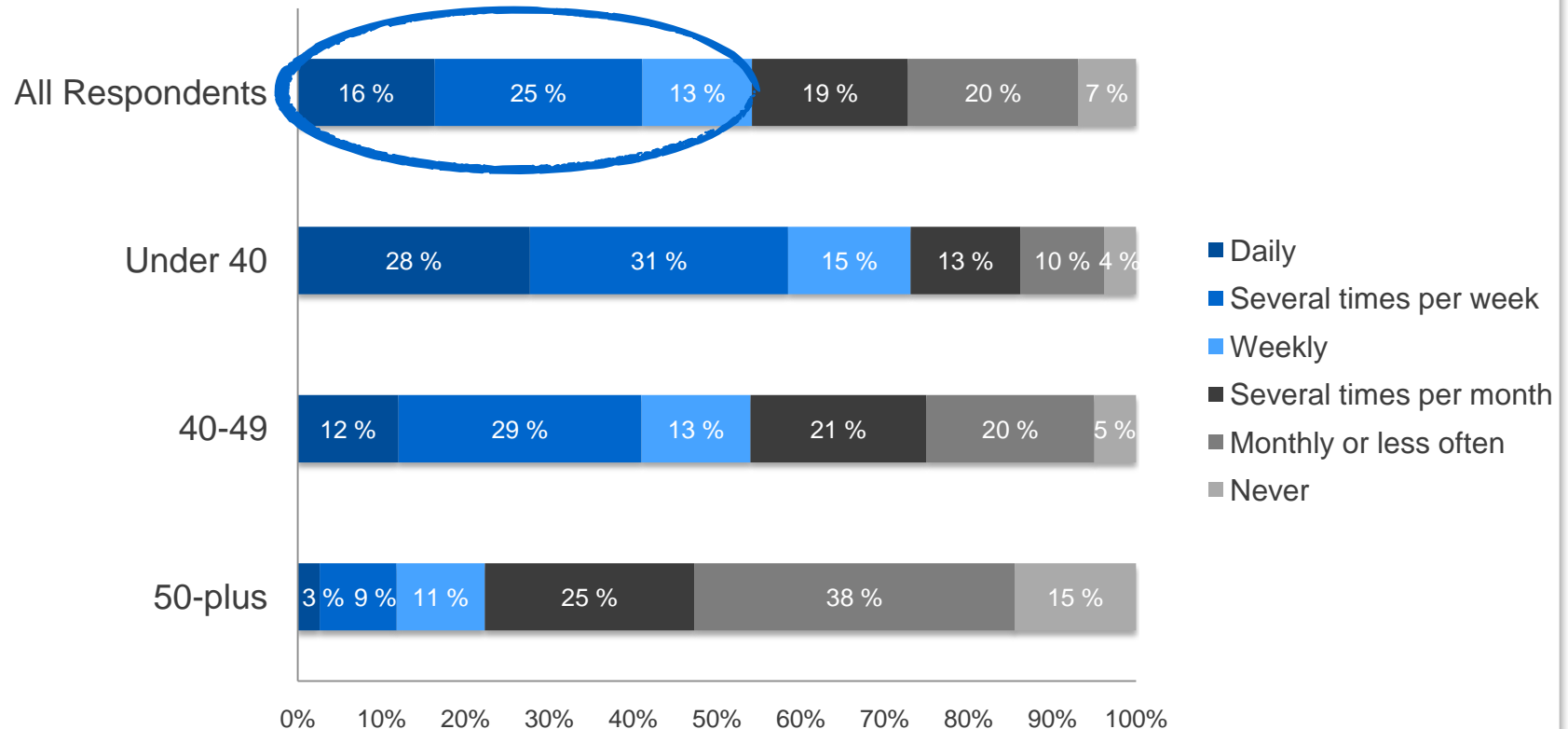
We read alone and watch as a group



# The Viral Nature of Video Encourages Sharing

## Especially For Younger Executives

**54%** of executives share work-related videos with colleagues at least weekly



Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010  
Q: I share work-related videos with colleagues (daily, several times per week, weekly, several times per month, monthly or less often, never)

# Developing Your Video Playbook

Best practices for reaching executives through video



# Developing Your B2B Video Playbook

## Match Message To Medium

When visiting business-related websites, execs seek:  
business news (74%) | business insight (64%) | product reviews (54%)

When visiting YouTube, the interest shifts to:  
customer testimonials (29%) | product demos (28%) | product reviews (27%)

## Mix Text & Video

59% of executives agree that if both text and video are available on the same topic on the same page, they **prefer to watch the video.**

## Shorter May Not Be Better

Asked about their **preferred length of work-related videos**, nearly half (47%) the senior executives in the survey said between **3-5 minutes**

Source: Google and Forbes Insights "B2B Trends in Mobile & Online Video Study" December 2010

Q: If video and text covering the same topic are on the same Web page, I will watch the video first. (Strongly agree, Agree, Disagree, Strongly disagree, Don't know). Q: What types of work-related online videos do you watch most often on business-related websites and on YouTube? (Business news reports, Business insights/expert advice, Speeches, event presentations, panel discussions, Case studies, Product reviews, Product demonstrations, How-to content, Virtual tradeshow, Customer testimonials, Other (please specify) Q: How long do you prefer work-related videos to be? (Under a min, 1-3 min, 3-5 min, Longer than 5 min, Don't know)

# Key Findings

## The Shift Toward a Non-Text Web

- 83% of execs watch more online video today than they were a year ago
- 75% of execs watch business videos on business related websites at least weekly (64% in '09)
- 52% of executives watch business videos on YouTube at least weekly (40% in '09)

## Video Drives Execs Down Purchase Path

- 65% of execs have visited a vendor's website after watching a video; 53% have conducted a search to locate more info; 51% of execs under 40 have made a business-related purchase after viewing a video

## Video is Business Social

- 54% of senior executives share work-related videos with colleagues at least weekly.

## Developing Your Video Playbook

- 59% of executives prefer video to text
- When visiting business-related websites, execs seek: business news (74%), business insight (64%), and product reviews (54%)
- When visiting YouTube, the interest shifts to: customer testimonials (29%), product demos (28%) and product reviews (27%)
- 47% of execs prefer videos 3-5 minutes long

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