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# The Value of Search for Wireless Product Launches

Google Compete

Clickstream and Survey Based Research based on a  
White-labeled Mobile Phone launch  
U.S., March 2010

# Methodology

- Study based on a major phone launch in Q2 2009
- Tracked online search and research activity using Compete's 2MM US opt-in panelists from Nov 2008 to Dec 2009, including carrier, OEM, 3rd party reseller and research sites
- Includes both paid and natural Search

We tracked those who searched for the newly launched product, following their behavior through the launch cycle.



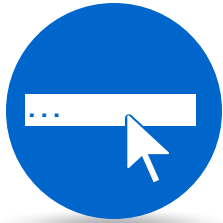
We analyzed those who added the product to cart, tracing their behavior backward from the point of purchase.



Surveyed searchers to understand their purchase behavior.



# Definitions



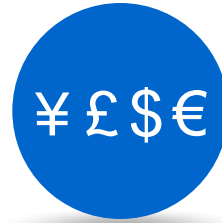
## Device Terms

In this study, a 'device term' is a search term that includes the name of the new device, using the OEM brand, not the carrier brand.



## Device Searchers

In this study, a 'device searcher' is a searcher looking for the new device by name, using the OEM brand, not the carrier brand.



## Purchaser

For purposes of the clickstream portion of this study, a "purchaser" is defined as someone who adds the launch product to the cart on the carrier site.



## Current Customers

Consumers within Compete's 2MM person panel who exhibit Customer-centric behavior on the launch carrier's website (e.g. log-in, pay a bill).



## Research

An online session in which a consumer visits a carrier, OEM, or retailer and views details on the launch phone (Device Product Pages).



62%

...of consumers who searched for a newly launched device **purchased** a phone.

# Online is key to pre-purchase research



2 of 3

in market for  
smartphone in  
next year<sup>1</sup>



78%

do not know exactly  
what brand of  
phone they will  
purchase<sup>2</sup>



74%

will research their  
next phone  
purchase online<sup>1</sup>



67%

Purchases made in-  
store by searchers of  
new phone launches<sup>3</sup>

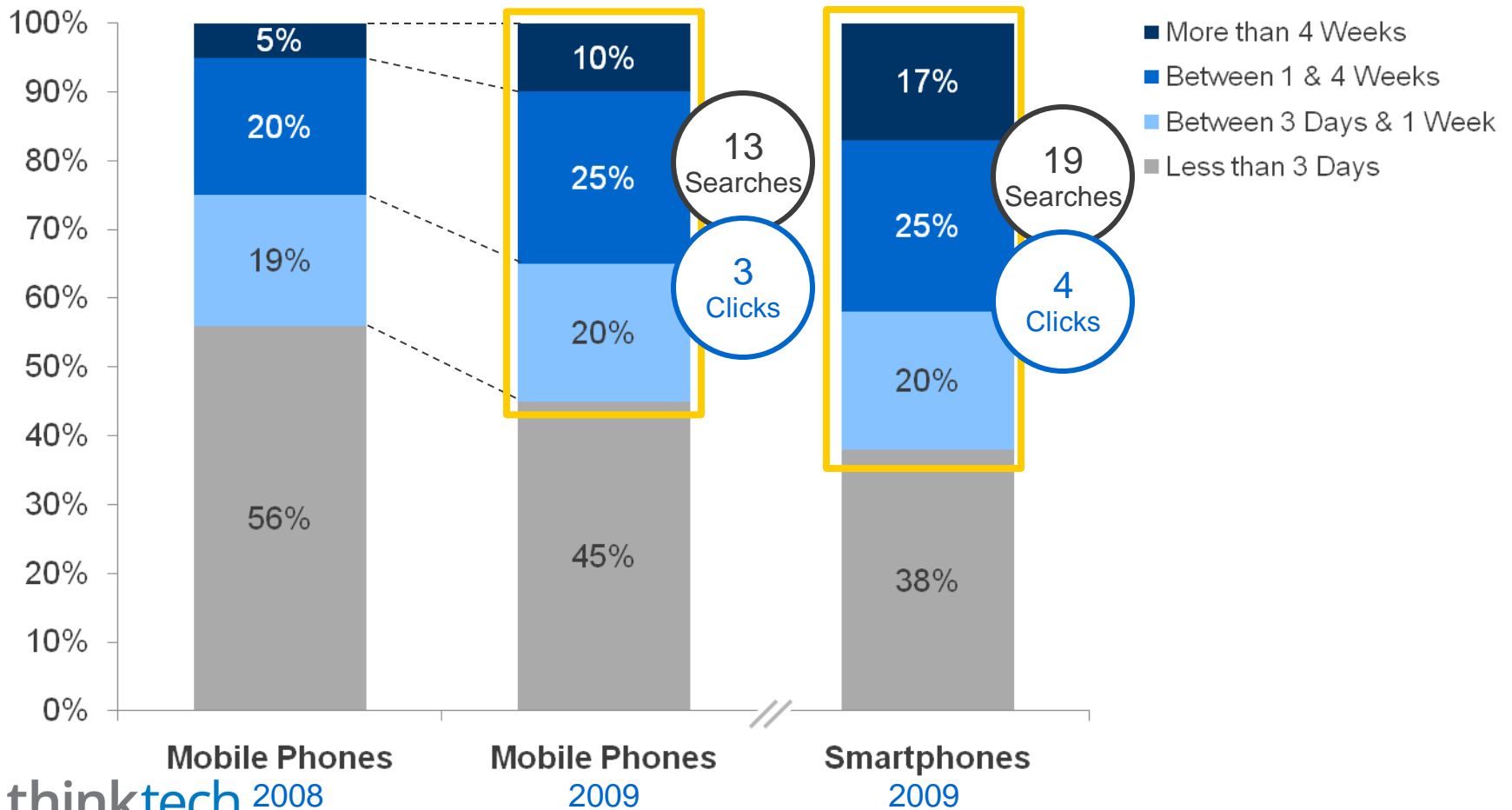
<sup>1</sup> Compete "Understanding Smartphone Owners" (September 2009)

<sup>2</sup> Compete & Google "Wireless Shopper Study" (February 2010)

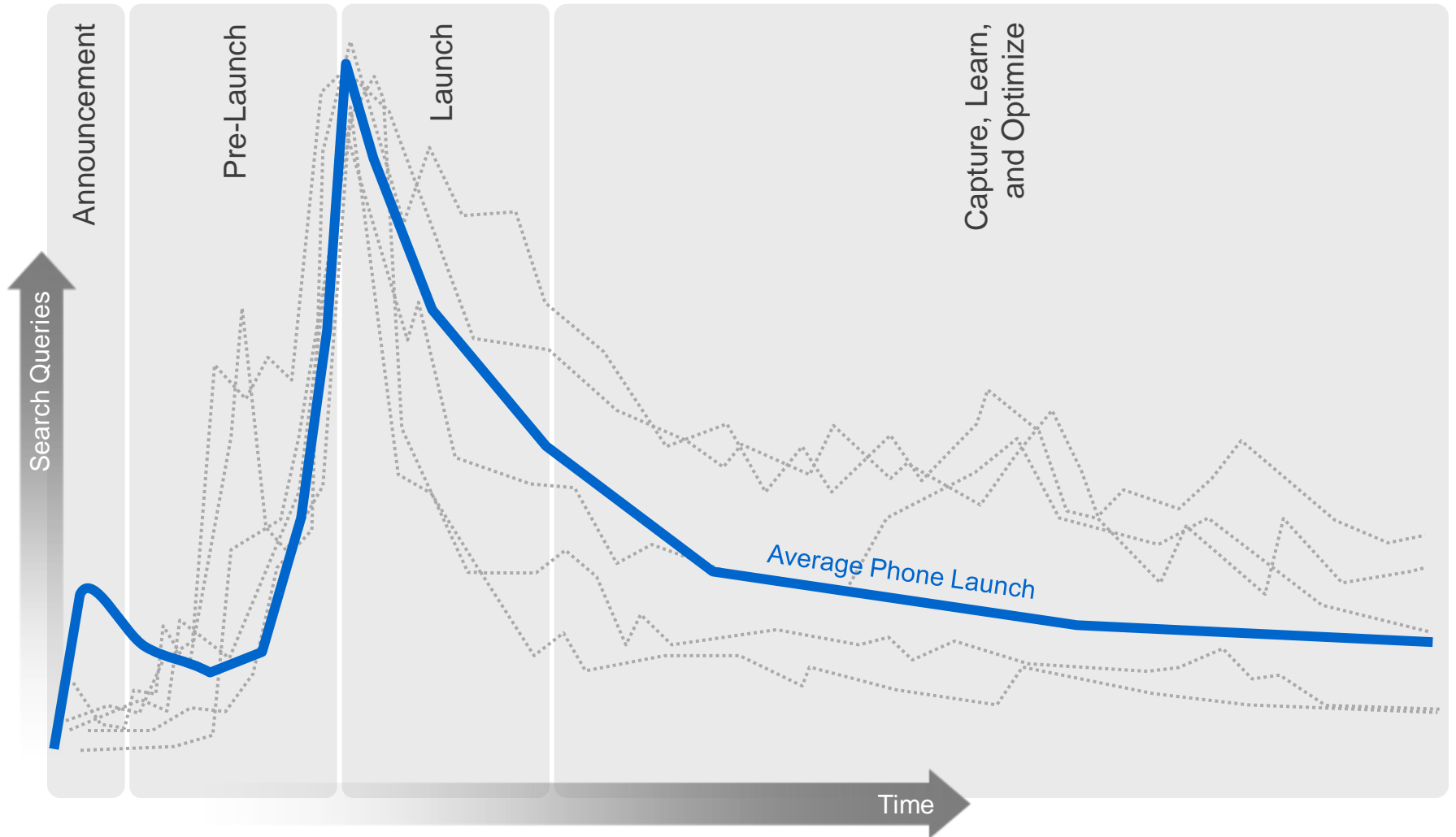
<sup>3</sup> Compete & Google "Value of Search for Wireless Product Launches" (March 2010)

# Smartphone shoppers spending more time researching their purchases online, searching

## Time Spent Research Purchase



# Consumers Search Throughout Launch Cycle

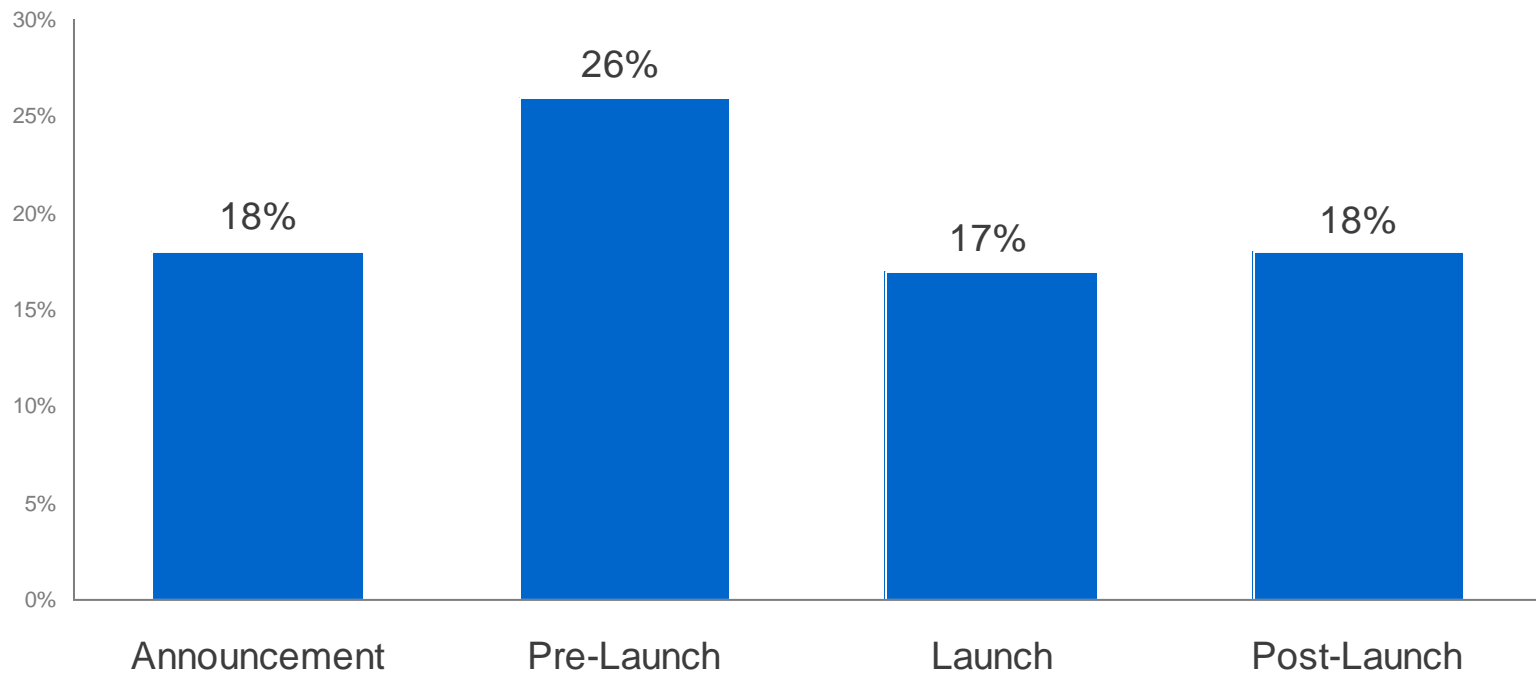




# Search Accounts for New Phone Site Visits

Before launch, Search provides up to a quarter of all device site traffic.

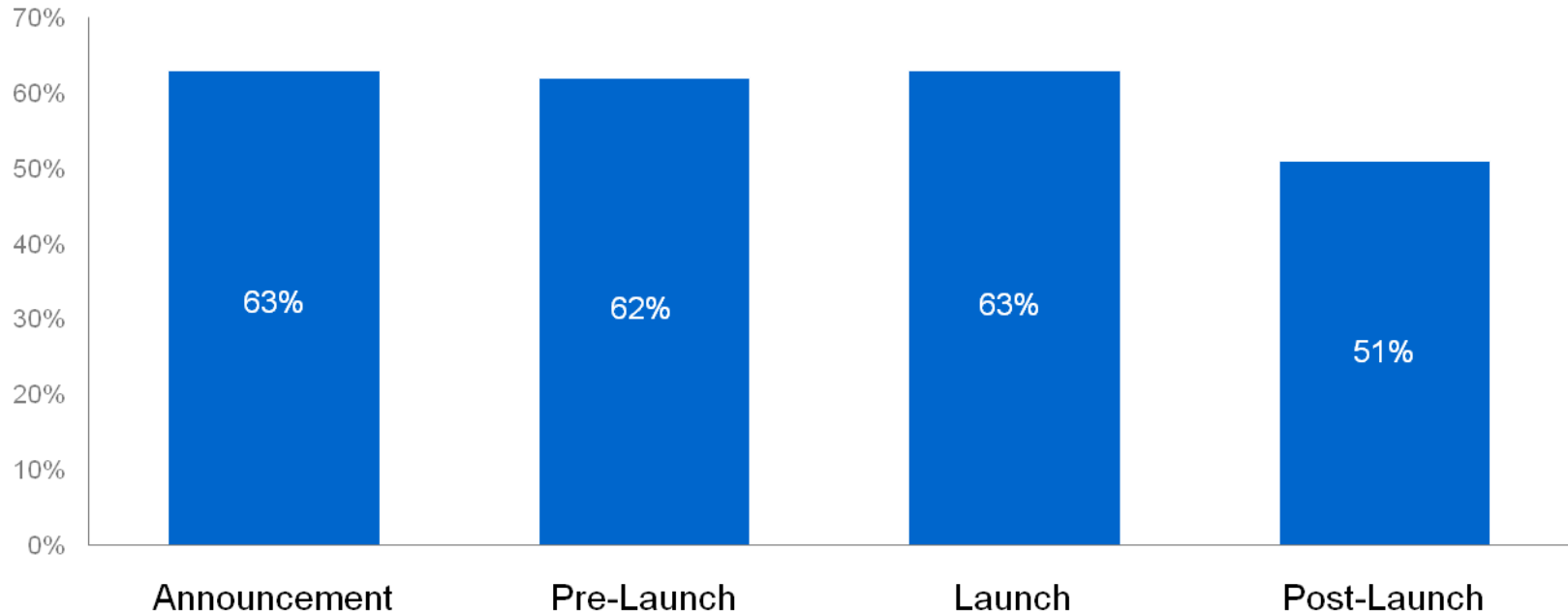
Search Share of Total Site Visits to New Device Product Pages  
(Share of search referrals among total referrals to Carrier and OEM sites)



# At First Mention, People Search By Name

Consumers search for new devices by name, as much before as after launch.

Percent of Search Referrals from Specific Device Keywords  
(Search referrals to OEM and Carrier pages, Compared to generic keywords)



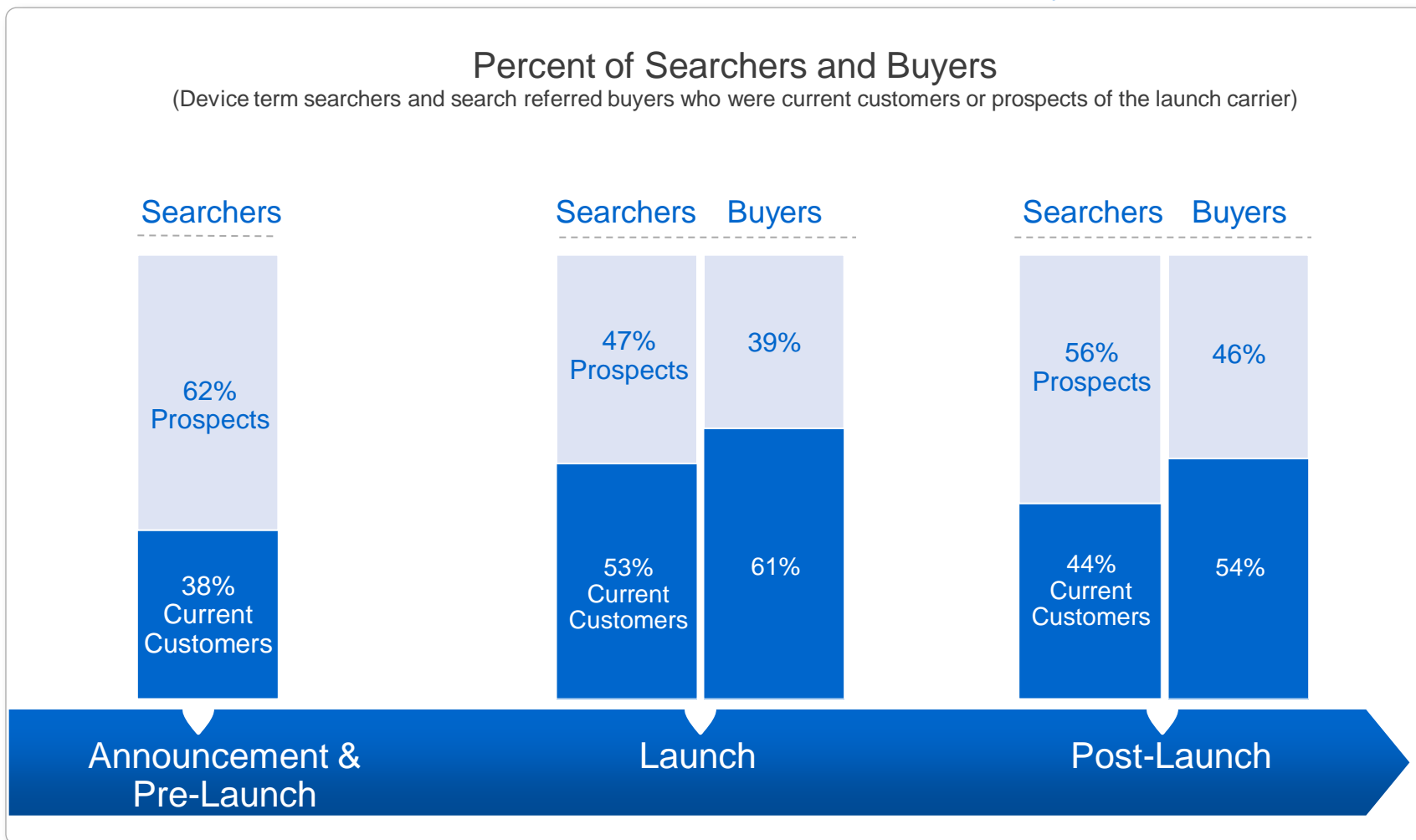
# Search Drives a Quarter of Phone Purchases



Search directly drove  
**25%**  
of all online device purchases

# Search Introduces New Customers

Both Prospects and Customers search to research and buy new phones.



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