

NEW GOOGLE DATA

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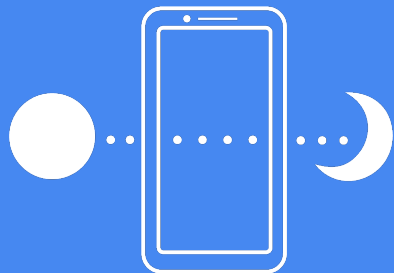
# How People Use Their Devices

What Marketers Need to Know

September 2016

## Section 1

# Device Usage in an Average Day



## Section 2

# What We Do On Our Devices



## Section 3

# How We Search Across Devices



# Introduction

The proliferation of devices has changed the way people interact with the world around them. With more touchpoints than ever before, it's critical that marketers have a full understanding of how people use devices so that they can be there and be useful for their customers in the moments that matter.

The findings in this report are based on real behavior from a sample of opted-in users. It reveals how, when, and where people use their devices throughout the day. As marketers, this important context will help you better understand the reality of the customer journey so you can more effectively reach them with a single story across devices, channels, and formats.

## A Few Key Findings:

1. **We live in a mobile-first world:** In an average day, more than 1/4 of all users only use a smartphone, which is nearly 2X as many as those who only use a computer.
2. **We freely move back and forth between devices to get things done:** Over half of users rely on more than one type of device in an average day, with 1/5 of them using another device while concurrently using a computer.
3. **Where we are influences how we use our devices:** The top three places people use their smartphones are home, work, and in a store.
4. **Search has gone mobile:** Of those who search, nearly 4 in 10 search only on a smartphone in an average day.
5. **The web is one of our most used resources:** Of those who browse the web in an average day, almost half do so on multiple devices. More than 7 in 10 users browse the web on their phones or computers in an average day.

# Methodology

## Data used in this report:

- Unless otherwise noted\*, the data in this report is based on findings from a behavioral measurement of a convenience sample of 11,964 opt-in Google users between January 1, 2016 and March 31, 2016. Data is calibrated to reflect a U.S. demographic of 18 to 49-year-old cross-device users.

## To be included in the sample, opt-in users needed to meet the following criteria:

- Age 18-49, residing in the U.S.
- Be an active cross-device user, defined as someone who used a Chrome, Internet Explorer, or Firefox browser on computer **and** an Android smartphone or tablet device for personal use (work devices not included). They must have visited at least 100 computer URLs and spent at least two hours on an Android device for the duration of the study.
- Signed into Google and turned on Location History. Users have also opted in to share location data.
- [Click here](#) for more methodology details and metric definitions.

## Source: All stats referenced, unless otherwise noted\*, are based on the following:

Google data, based on convenience sample of opt-in U.S. cross-device users, age 18-49 who signed into Google and turned on Location History (mobile Android-only and IE/Chrome/Firefox computer browser). Calibrated to population studied, January 2016 - March 2016. Location analysis excludes locations that are not identifiable. Apps include browser apps. Search includes Google Search only.

\*Other data sources used in the report (source noted on the slide) include Google search data and YouTube internal data.

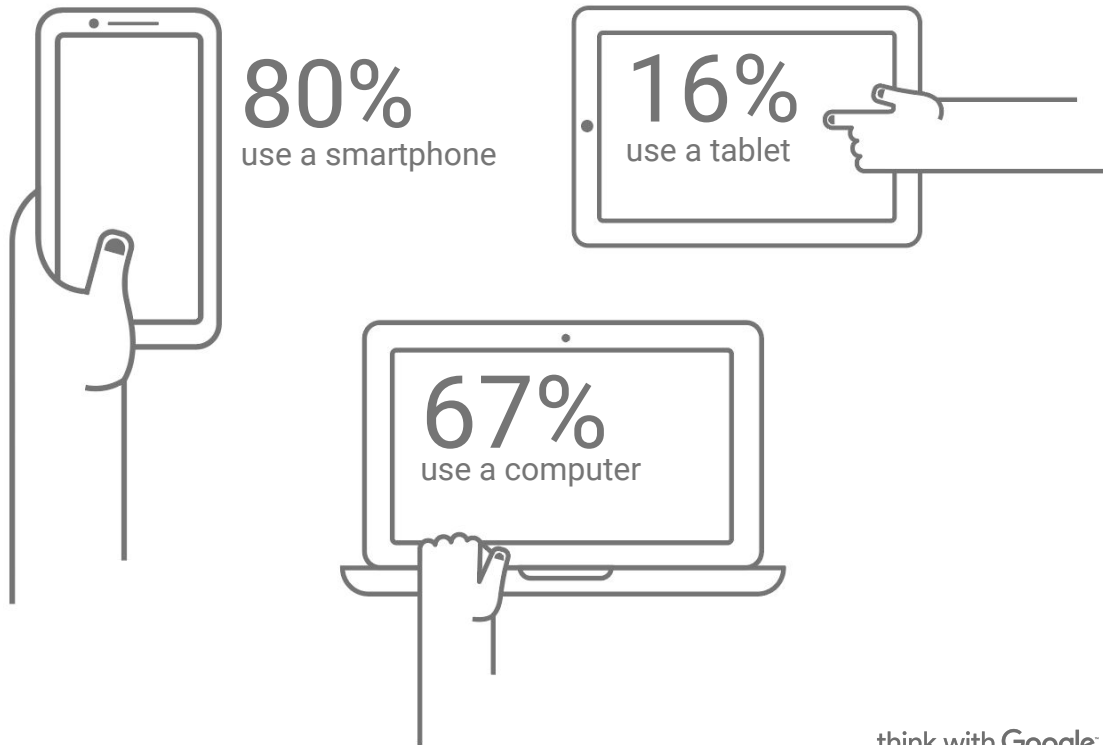


# We Live in a Mobile-First World

**We live in a world where people literally expect answers at their fingertips, and to find them, they're turning to the nearest device.**

For marketers, more usage across more devices means there are more touchpoints to engage with audiences than ever before.

Device usage in an average day:



[See Full Source Here](#)

think with Google

# For a Quarter of Users, It's a Mobile-Only World

More than **1 in 4 users** *only* use a smartphone in an average day—almost 2X as many as those who only use a computer.

As a marketer, if you aren't reaching your customers on mobile, you risk missing out on **1/4 of your potential audience**.

Device usage in an average day:



27%

use a smartphone only



14%

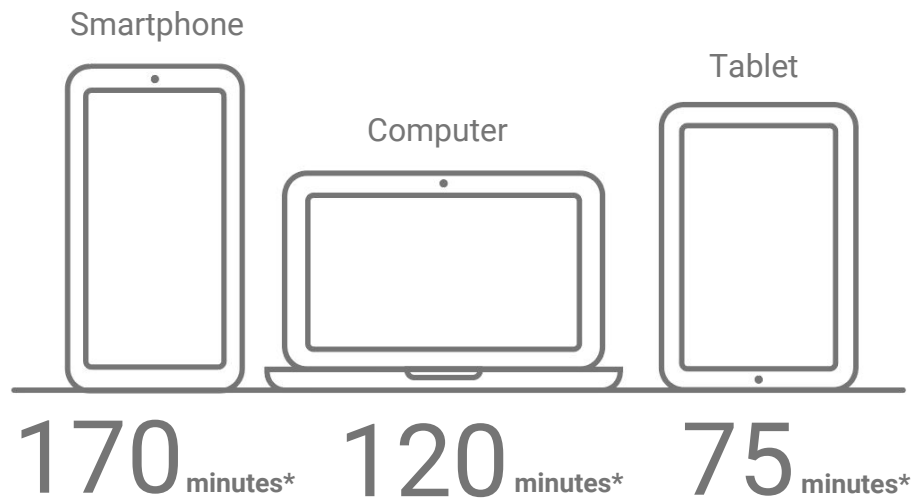
use a computer only

# We Spend Almost 3 Hours a Day On Our Smartphones

**A significant amount of our daily lives are spent on devices, with smartphones leading the way. Those who use a smartphone spend almost three hours per day on it.**

And for many, computers and tablets are important daily resources. It's necessary that marketers consider the devices their customers are using at all times to reach them with the right message for the right screen.

Average time spent on devices used in an average day:



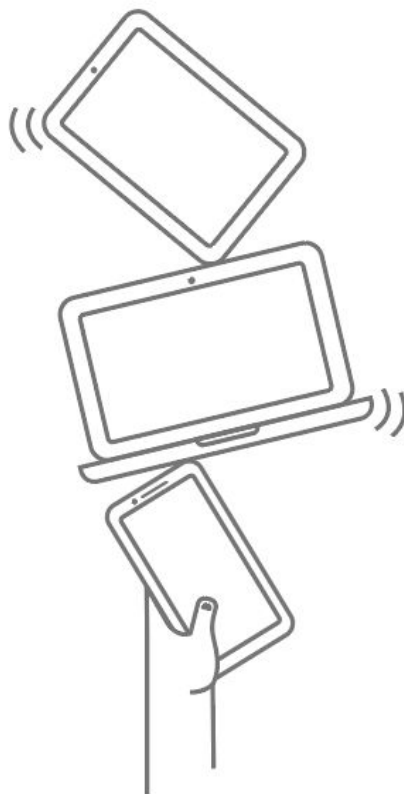


# We Juggle Multiple Devices

**We move back and forth between smartphones, tablets, and computers throughout the day.**

When at home, **1/5** of people use another device while concurrently using a computer.

Fluid movement between devices changes our approach to marketing. Consumers now interact with your brand concurrently on more than one type of device, making it critical to provide the same great experience across screens.



Device usage in an average day:

**57%**  
use more than one type of device

**21%**  
are concurrent\* users

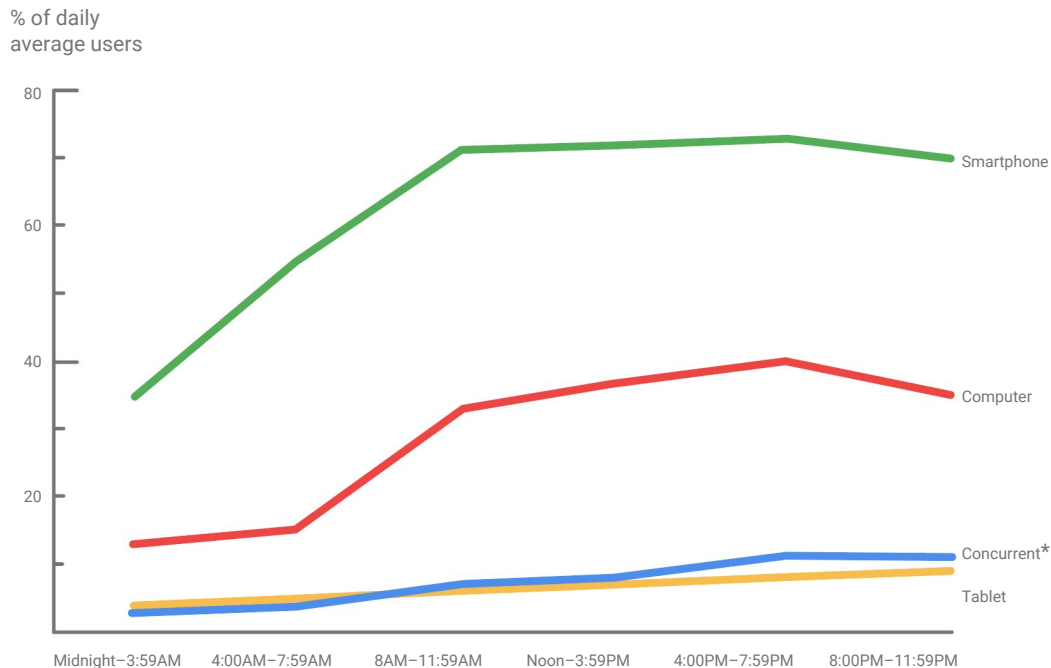
# We Use Our Devices Throughout the Day

**Understanding when your customers are most likely to be on their devices will help you make smart decisions about when and how to engage them.**

Beginning in the morning, smartphone usage is consistent throughout the day and into the night, while computer usage peaks around 8:00 p.m.

Over 30% use their phones after midnight, so there's never really an off-time.

% of daily average device users by daypart

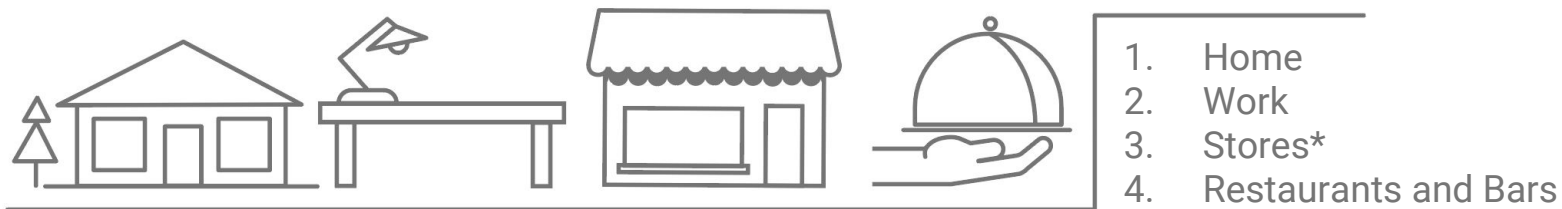


# What We Do On Our Devices:

How We Search, Watch YouTube, Browse the Web, and Use Apps



# Top 4 Places We Use Our Smartphones in an Average Day



# How We Search On Our Devices

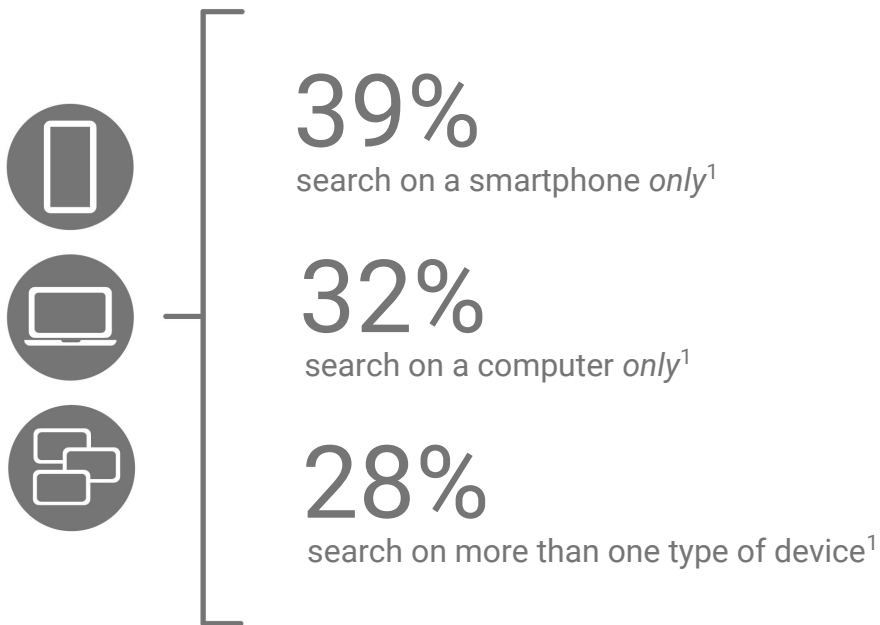


**Nearly 4 in 10 users search *only* on their smartphones in an average day.**

As a result of this shift to mobile, we now see more Google searches happening on smartphones than on computers.<sup>2</sup>

However, in an average day, more than a quarter of users search across more than one type of device. It's necessary to reach your customers wherever they are.

Among users who search in an average day:



Source 1: [See Full Source Here](#)

Source 2: Google Internal Data, for 10 countries including the U.S. and Japan, April 2015

think with Google

# How We Search Throughout the Day

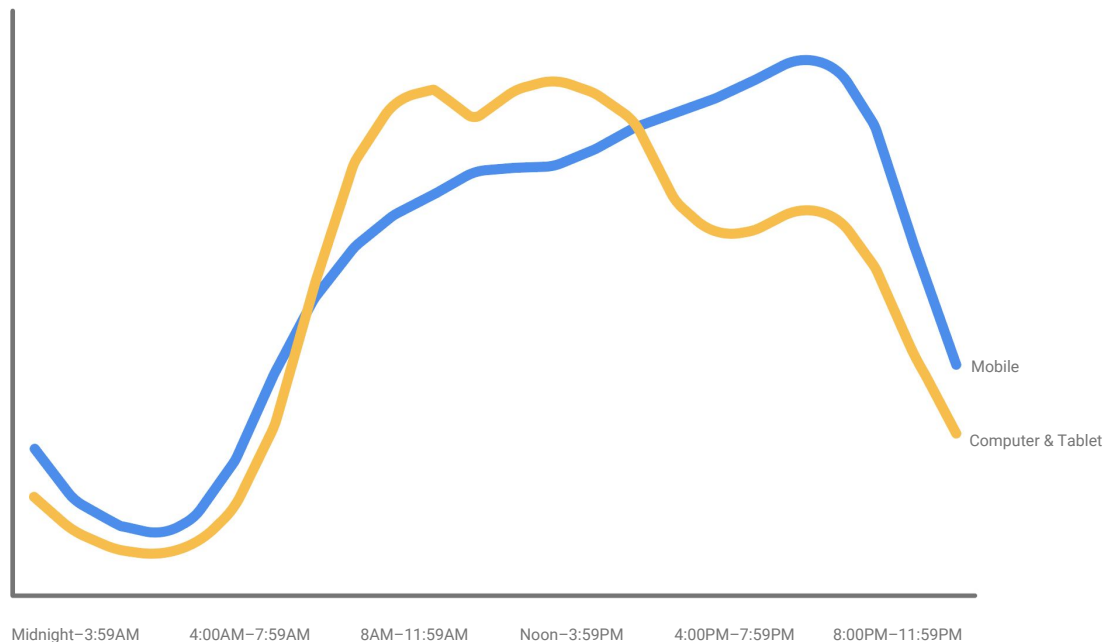


**More searches happen on mobile than on computers and tablets for 15 of the 24 hours in a typical day.**

Mobile leads in the morning, but computers become dominant around 8 a.m. when people might start their workday.

Mobile takes the lead again in the late afternoon when people might be on the go, and continues to increase into the evening, spiking around primetime viewing hours.

Search volume by device during an average day



# Mobile Search is Growing Across Categories



## Year-over-year growth in mobile searches:

Click the links below for a deep dive into each theme



[Auto](#)

+30%



[Apparel](#)

+40%



[Travel](#)

+25%



[Media and Entertainment](#)

+20%



[Home and Garden](#)

+45%



[Food and Beverage](#)

+30%



[Beauty and Personal Care](#)

+30%



[Consumer Electronics](#)

+40%



[Finance](#)

+35%

# How We Watch YouTube on Our Phones



**The best video experience is on whatever screen is most convenient.**

In an average day, 4 in 10 users who watch YouTube do so only on their smartphones<sup>2</sup>.

For marketers, this means it's necessary to ensure both media and creative strategies reflect the behaviors of your audience.



The average YouTube mobile viewing session is more than

**40**

minutes<sup>1</sup>

Among users who watch YouTube in an average day

**42%**

watch on a smartphone *only*<sup>2</sup>



# When We Watch YouTube on Different Devices



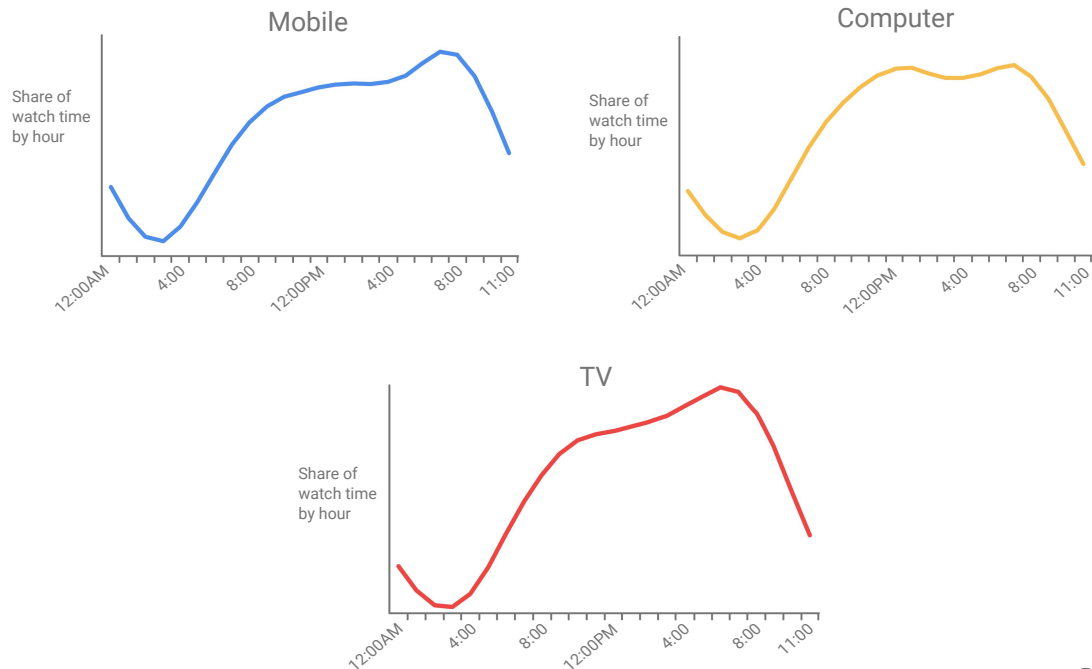
**Whether on a smartphone, computer, or TV, we watch YouTube on different screens throughout the day.**

YouTube watch time on TVs and smartphones spikes during primetime.

Computer watch time peaks around lunchtime, when people check out videos as they might be taking an afternoon break.

## YouTube share of watch time, trended by screen-type

The trend lines do not represent watch time volume; they show relative share of watchtime for each device throughout the day.



# What We're Watching on YouTube by Screen-Type



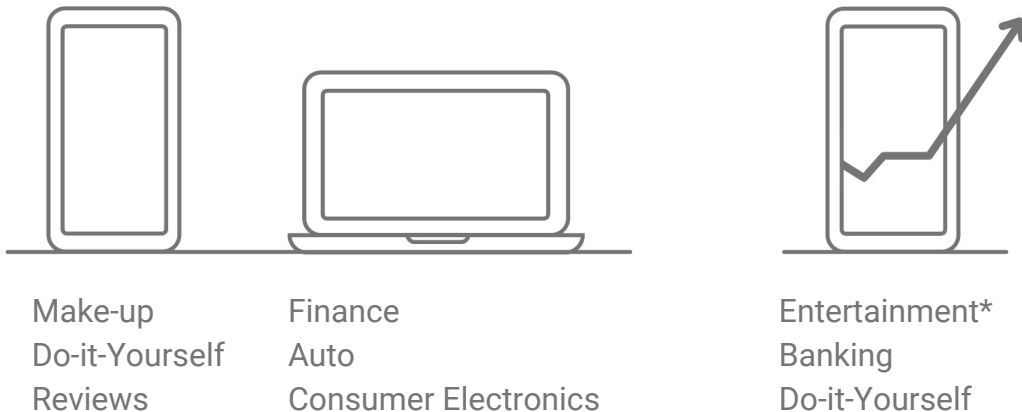
While the majority of YouTube views are happening on mobile devices<sup>1</sup>, there are some categories where viewership leans toward specific screens.

On computers, viewers are watching high involvement categories like Finance and Auto.

On mobile, YouTube plays a utility role, with Do-it-Yourself and Reviews among the content viewers watch.

## Categories people watch on their devices<sup>2</sup>

Relative to total share of watch time by category on each device



## Examples of fast-growing mobile search categories on YouTube<sup>3</sup>

Source 1: YouTube Internal Data, April 2016

Source 2: Google Internal Data, July 2016, U.S. Classification of video was based on public data such as headlines and tags, and may not account for every such video available on YouTube. Calculation compares the share of watch time for mobile and desktop across all categories in July 2016.

Source 3: Google Internal Data, U.S., Classification as "Banking," "Reaction," and "DIY" videos were based on public data such as headlines and tags, and may not account for every such video available on YouTube, July 2015 and July 2016.

# Devices We Use to Browse the Web



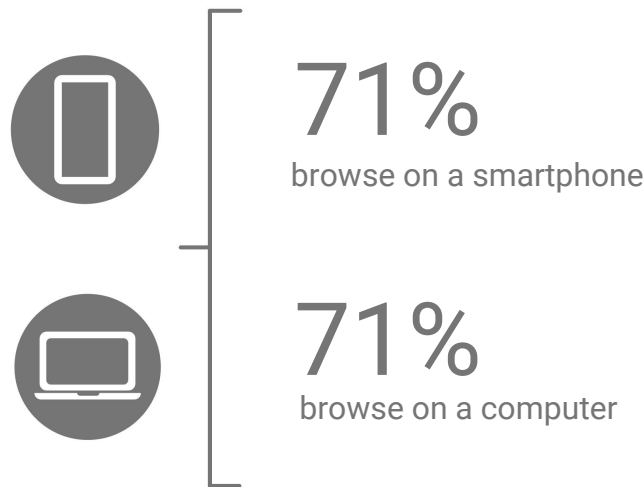
**In an average day, almost everyone browses the web, making it one of our top digital activities.**

The same percentage of users—more than 7 in 10—browse the web on their smartphones or computers.

With this even distribution, it's important that marketers consider the site experience their customers will see as they browse on a variety of devices.

**94%** browse the web in an average day

Among users who browse the web in an average day:



[See Full Source Here](#)

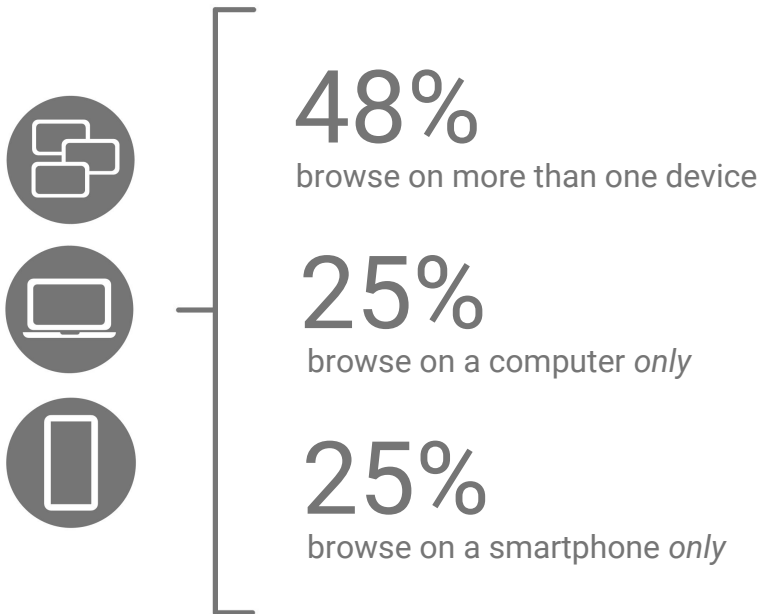
# Web Browsing is a Cross-Screen Experience



**Browsing the web across screens is the new normal for consumers, as nearly 50% browse on more than one screen in an average day.**

With this reliance on multiple screens, connected messages across devices are more relevant for the user.

Among users who browse the web in an average day:



[See Full Source Here](#)

think with Google

# How We Browse Throughout the Day



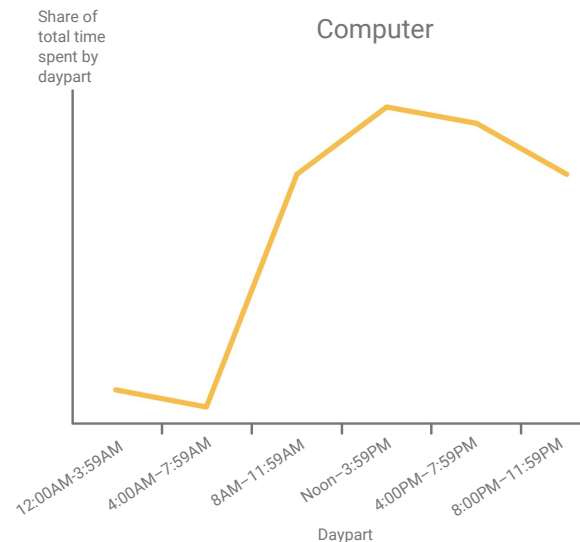
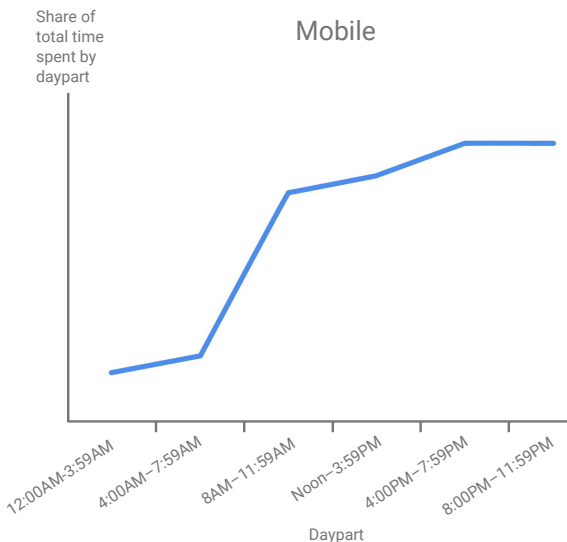
**When browsing the web, there are clear times throughout the day when we turn to our smartphones and our computers:**

Browsing on a computer increases in the afternoon and into the evening, with a peak between noon and 4:00 p.m.

Mobile browsing is consistent throughout the day, with a peak in the evening and nighttime hours.

Web browsing share of total time spent, trended by device







The trend lines do not represent total time spent; they show relative share of usage for each device throughout the day.



# How and When We Use Our Apps in an Average Day



On average, in a given hour when actively using their phone, users interact with **4.8 apps**

	 Email Apps	 Travel & Local Apps	 Social Apps	 Shopping Apps	 Messaging Apps	 Browser Apps
App category includes:	Yahoo! Mail, Gmail, etc.	Google Maps, Waze, Airbnb, etc.	Facebook, Twitter, etc.	Amazon, eBay, etc.	WhatsApp, Kik, etc.	Chrome, Firefox, etc.
% of smartphone segment* who use this app-type	71%	27%	75%	33%	88%	83%

Among those who use this app-type on their smartphone...

% who use at home	45%	28%	47%	40%	45%	44%
Peak daypart use, by total time spent	Late Morning	Evening	Night	Evening	Afternoon and Evening	Night

# How We Search Across Devices

## Category Deep-Dives

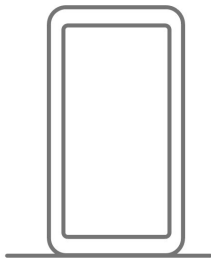
# Beauty and Personal Care Search Trends



What people are searching for on their devices

Themes are relative to overall Beauty and Personal Care search share by device

[Go back to slide](#)



## Mobile Themes<sup>1</sup>

### Nail Care

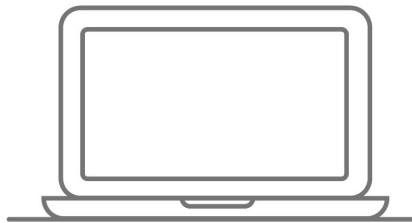
e.g. *Nail salons near me, Nail designs*

### Body Art

e.g. *Tattoos, Tattoo shops near me*

### Hair Care

e.g. *Barber shop, Hairstyles*  
(i.e. *Balayage*)



## Computer & Tablet Themes<sup>1</sup>

### Fashion and Style

e.g. *Saks, Gilt*

### Anti-Aging

e.g. *Retinoids, Anti-aging*

### Spa

e.g. *Facial spa, Yag laser*



## Fast Growing Mobile Themes<sup>2</sup>

### Makeup and Cosmetics

Over 50% YoY growth

### Perfumes and Fragrances

Over 40% YoY growth

### Skincare

Over 35% YoY growth

Source 1: Google Search Data, U.S., Jan - Jun 2016. Mobile & Computer Theme definition is relative to the specific category device share. To be considered a 'Mobile Theme,' it must be 5% more than the overall category mobile share of searches. To be considered a 'Computer Theme,' it must be 5% more than the overall category computer share of searches.  
Source 2: Google Search Data, U.S., Jan - Jun 2015 vs Jan - Jun 2016

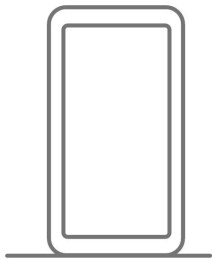


# Apparel Search Trends



What people are searching for on their devices  
Themes are relative to overall Apparel search share by device

[Go back to slide](#)



## Mobile Themes<sup>1</sup>

### Prom Dresses

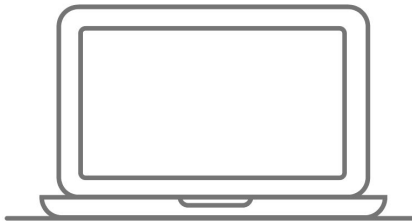
*e.g. Homecoming dresses, cheap prom dresses*

### Baby and Toddler Clothing

*e.g. Baby girl clothes, baby stores near me*

### Dry Cleaning and Alterations

*e.g. Laundromat near me, 24-hour laundromat*



## Computer & Tablet Themes<sup>1</sup>

### Custom Clothing

*e.g. Tailors, Suits*

### Plus Size Clothing

*e.g. Women within, kingsize menswear*

### Suits and Business Attire

*e.g. Dressy pant suit, strong suits*



## Fast Growing Mobile Themes<sup>2</sup>

### Petite Clothing:

*Over 80% YoY growth*

### Coats:

*Over 55% YoY growth*

### Sleepwear:

*Over 50% YoY growth*

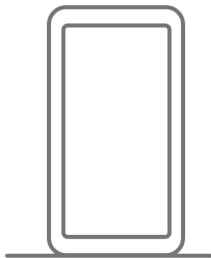
Source 1: Google Search Data, U.S., Jan - Jun 2016. Mobile & Computer Theme definition is relative to the specific category device share. To be considered a 'Mobile Theme,' it must be 5% more than the overall category mobile share of searches. To be considered a 'Computer Theme,' it must be 5% more than the overall category computer share of searches.  
Source 2: Google Search Data, U.S., Jan - Jun 2015 vs Jan - Jun 2016

# Auto Search Trends



What people are searching for on their devices  
Themes are relative to overall Auto search share by device

[Go back to slide](#)



## Mobile Themes<sup>1</sup>

### Station Wagons

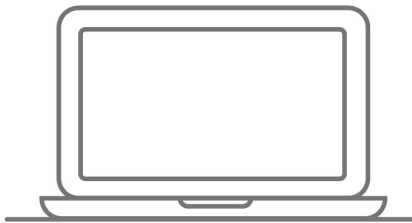
*e.g. Mustang station wagon,  
ford focus hatchback*

### Pick-up Trucks

*e.g. Ram, toyota tacoma*

### Sports Cars

*e.g. audi r8, 2016 corvette*



## Computer & Tablet Themes<sup>1</sup>

### Campers and RVs

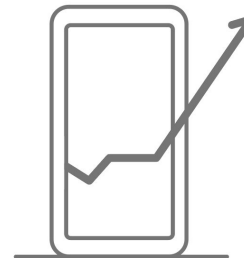
*e.g. Motorhome specialist*

### Hybrid and Alternative Vehicle

*e.g. Tesla motors, faraday future*

### Micro Cars and City Cars

*e.g. Mini mania, clio columbia*



## Fast Growing Mobile Themes<sup>2</sup>

### Hybrid and Alternative Vehicles:

*Over 55% YoY growth*

### Campers and RVs:

*Over 45% YoY growth*

### Vans and Minivans:

*Over 40% YoY growth*

Source 1: Google Search Data, U.S., Jan - Jun 2016. Mobile & Computer Theme definition is relative to the specific category device share. To be considered a 'Mobile Theme,' it must be 5% more than the overall category mobile share of searches. To be considered a 'Computer Theme,' it must be 5% more than the overall category computer share of searches.  
Source 2: Google Search Data, U.S., Jan - Jun 2015 vs Jan - Jun 2016

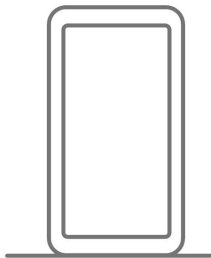
# Consumer Electronics Search Trends



What people are searching for on their devices

Themes are relative to overall Consumer Electronics search share by device

[Go back to slide](#)



## Mobile Themes<sup>1</sup>

### Car Speaker

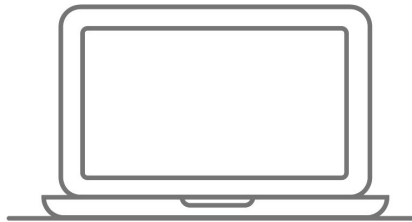
*e.g. 12-inch subwoofer, 6x9 speakers*

### Home audio equalizers

*e.g. Bass booster, equalizer*

### Portable DVD players

*e.g. Portable DVD players,  
dual screen portable DVD player*



## Computer & Tablet Themes<sup>1</sup>

### DVRs and Set-Top Boxes

*e.g. X1 remote, DVR box*

### HD Players and Recorders

*e.g. Live media player, playbox HD*

### Home Theater Projectors

*e.g. Lumo projector, phone projector*



## Fast Growing Mobile Themes<sup>2</sup>

### Home Audio Equalizers:

*Over 80% YoY growth*

### DVD Players:

*Over 60% YoY growth*

### GPS Devices:

*Over 50% YoY growth*

Source 1: Google Search Data, U.S., Jan - Jun 2016. Mobile & Computer Theme definition is relative to the specific category device share. To be considered a 'Mobile Theme,' it must be 5% more than the overall category mobile share of searches. To be considered a 'Computer Theme,' it must be 5% more than the overall category computer share of searches.

Source 2: Google Search Data, U.S., Jan - Jun 2015 vs Jan - Jun 2016

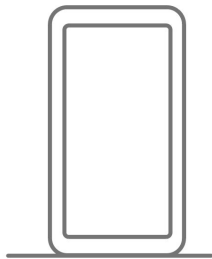
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# Finance Search Trends



What people are searching for on their devices  
Themes are relative to overall Finance search share by device

[Go back to slide](#)



## Mobile Themes<sup>1</sup>

### ATMs

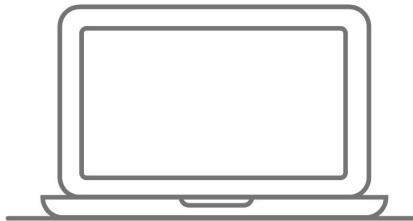
e.g. *ATM near me, cash point near me*

### Money Transfers and Wire Services

e.g. *Western Union near me, how to fill out a money order*

### Banking

e.g. *(bank brand) near me, (bank brand) online login*



## Computer & Tablet Themes<sup>1</sup>

### Accounting and Auditing

e.g. *IRS gov, W9*

### Grants, Scholarships, and Financial Aid

e.g. *Student loans, scholarships*

### Financial Planning and Management

e.g. *Thrift savings plan, 401K calculator*



## Fast Growing Mobile Themes<sup>2</sup>

### Investing:

*Over 50% YoY growth*

### ATMs:

*Over 50% YoY growth*

### Business Finance:

*Over 35% YoY growth*

Source 1: Google Search Data, U.S., Jan - Jun 2016. Mobile & Computer Theme definition is relative to the specific category device share. To be considered a 'Mobile Theme,' it must be 5% more than the overall category mobile share of searches. To be considered a 'Computer Theme,' it must be 5% more than the overall category computer share of searches.  
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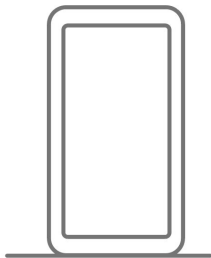
# Food and Beverage Search Trends



## What people are searching for on their devices

Themes are relative to overall Food and Beverage search share by device

[Go back to slide](#)



### Mobile Themes<sup>1</sup>

**Pizza and Pizza Delivery**

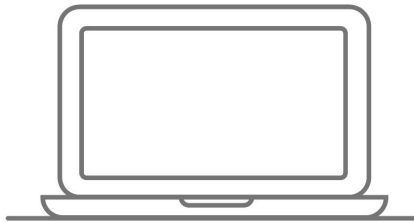
*e.g. Pizza near me, Pizza Hut*

**Fast Food Restaurants**

*e.g. McDonalds, Chick-Fil-A*

**Juice**

*e.g. Juice bar, tropical smoothie*



### Computer & Tablet Themes<sup>1</sup>

**Restaurant Reservations and Booking**

*e.g. Open Table, NYC restaurant week*

**Online Grocery Shopping and Delivery**

*e.g. Peapod, Amazon Fresh*

**Prepared Foods**

*e.g. Meals delivered, prepared meal delivery*



### Fast Growing Mobile Themes<sup>2</sup>

**Prepared Foods:**

*Over 55% YoY growth*

**Restaurant Reservations and Booking:**

*Over 55% YoY growth*

**Online Grocery Shopping and Delivery:**

*Over 50% YoY growth*

Source 1: Google Search Data, U.S., Jan - Jun 2016. Mobile & Computer Theme definition is relative to the specific category device share. To be considered a 'Mobile Theme,' it must be 5% more than the overall category mobile share of searches. To be considered a 'Computer Theme,' it must be 5% more than the overall category computer share of searches.

Source 2: Google Search Data, U.S., Jan - Jun 2015 vs Jan - Jun 2016

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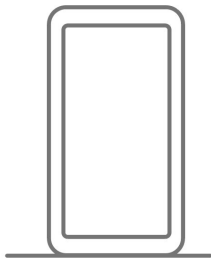
# Home and Garden Search Trends



## What people are searching for on their devices

Themes are relative to overall Home and Garden search share by device

[Go back to slide](#)



### Mobile Themes<sup>1</sup>

#### Home Laundry

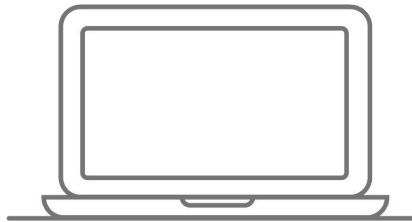
*e.g. How to shrink a shirt, how to get a sharpie out of clothes*

#### Pillows

*e.g. Pregnancy pillows, boyfriend pillow*

#### Playroom and Children's Furniture

*e.g. Toddler table & chairs, booster seat for table*



### Computer & Tablet Themes<sup>1</sup>

#### Medicine Cabinets

*e.g. Mirrored medicine cabinet, medicine cabinet with light*

#### Quilts

*e.g. Baby quilts, patchwork quilts*

#### Dishwashers

*e.g. Best dishwashers 2016, miele dishwasher*



### Fast Growing Mobile Themes<sup>2</sup>

#### Decorative Throw Pillows:

*Over 85% YoY growth*

#### Kitchen Storage:

*Over 85% YoY growth*

#### Coffee Table and End Tables:

*Over 80% YoY growth*

Source 1: Google Search Data, U.S., Jan - Jun 2016. Mobile & Computer Theme definition is relative to the specific category device share. To be considered a 'Mobile Theme,' it must be 5% more than the overall category mobile share of searches. To be considered a 'Computer Theme,' it must be 5% more than the overall category computer share of searches.

Source 2: Google Search Data, U.S., Jan - Jun 2015 vs Jan - Jun 2016

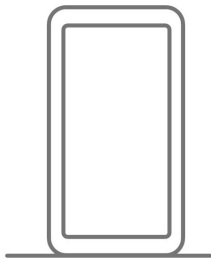
# Media and Entertainment Search Trends



What people are searching for on their devices

Themes are relative to overall Media and Entertainment search share by device

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## Mobile Themes<sup>1</sup>

### Movie Tickets

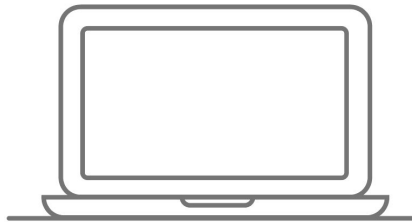
e.g. Regal cinemas, Fandango movies

### Latin Music

e.g. Tango, Prince Royce

### DVD and Video Rentals

e.g. Redbox near me, videoshop



## Computer & Tablet Themes<sup>1</sup>

### Filmmaking

e.g. Director's Guide to America, filmmaking stuff

### Video on Demand

e.g. Amazon Prime video, watch TV online

### Blu-Ray Discs

e.g. 4K Blu-Ray, Blu-Ray discs



## Fast Growing Mobile Themes<sup>2</sup>

### Comics and Graphic Novels:

Over 55% YoY growth

### Sci-Fi and Fantasy Films:

Over 45% YoY growth

### Sports Scores and Stats:

Over 50% YoY growth

Source 1: Google Search Data, U.S., Jan - Jun 2016. Mobile & Computer Theme definition is relative to the specific category device share. To be considered a 'Mobile Theme,' it must be 5% more than the overall category mobile share of searches. To be considered a 'Computer Theme,' it must be 5% more than the overall category computer share of searches.

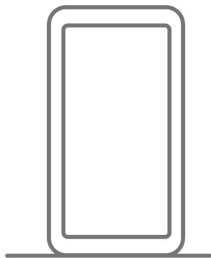
Source 2: Google Search Data, U.S., Jan - Jun 2015 vs Jan - Jun 2016

# Travel Search Trends



What people are searching for on their devices  
Themes are relative to overall Travel search share by device

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## Mobile Themes<sup>1</sup>

### Car Services and Taxis

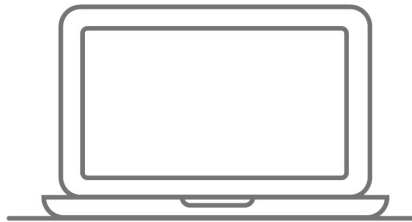
e.g. Taxi service, taxi near me

### Destination Activities

e.g. Things to do near me, Six Flags tickets

### Dining

e.g. Local restaurants, places to eat near me



## Computer & Tablet Themes<sup>1</sup>

### Travel Insurance

e.g. International health insurance, visitor health insurance

### Camping

e.g. Lake Tahoe camping, RV parks in Florida

### City and Short Trips

e.g. Day trips from Paris, London to Paris day trip



## Fast Growing Mobile Themes<sup>2</sup>

### Travel Insurance

Over 55% YoY growth

### Camping

Over 45% YoY growth

### Air

Over 40% YoY growth

Source 1: Google Search Data, U.S., Jan - Jun 2016. Mobile & Computer Theme definition is relative to the specific category device share. To be considered a 'Mobile Theme,' it must be 5% more than the overall category mobile share of searches. To be considered a 'Computer Theme,' it must be 5% more than the overall category computer share of searches.  
Source 2: Google Search Data, U.S., Jan - Jun 2015 vs Jan - Jun 2016



# Methodology Details and Definitions

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## When reporting smartphone, tablet, and computer usage, additional filters were applied to cleanse the data:

- Tablet and smartphone: Filter out app data that is less than 1 second and greater than 3 hours. The < 1s filter helps remove accidental app opens, and the > 3hrs filter helps remove activity such as Netflix playing while asleep.
- Computer browser: Aggregating the time between URL requests. Upper bound limits are 5 minutes for general URLs, 10 minutes for YouTube, and 30 minutes for video sites such as Netflix.
- All Devices: To be included in the analysis, users have to be part of the opt-in user pool 15 days out of a 28 rolling lookback window.

## Metric Definitions:

- Daily average time spent: The average time spent per day by study group.
- Daily average users: The average number of users who performed said activity on mobile, tablet, or computer devices.
- Simultaneous device usage: Users who use computer and tablet/smartphone within one hour time interval at home.