



Local Consumer Insights – Bringing Search into Focus

- Prepared for Street Fight Summit

June 5, 2012



Slides at @phil_hendrix

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Overview

- **How Consumers Define Local**
- **Local Search**
- **Local Search on Mobile**
- **Beyond Search – The Local Consumer**

About the Research:

- Online survey (10 – 12 mins.)
- n = 1,144 respondents
- Sample balanced on region, gender, age
- Smartphone owners oversampled (n = 891)

What Does the Consumer Mean by “Local”?



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Atlanta (formerly known as “Terminus”)



A Recent Trip and (Many) Local Searches

SETON HALL | LAW



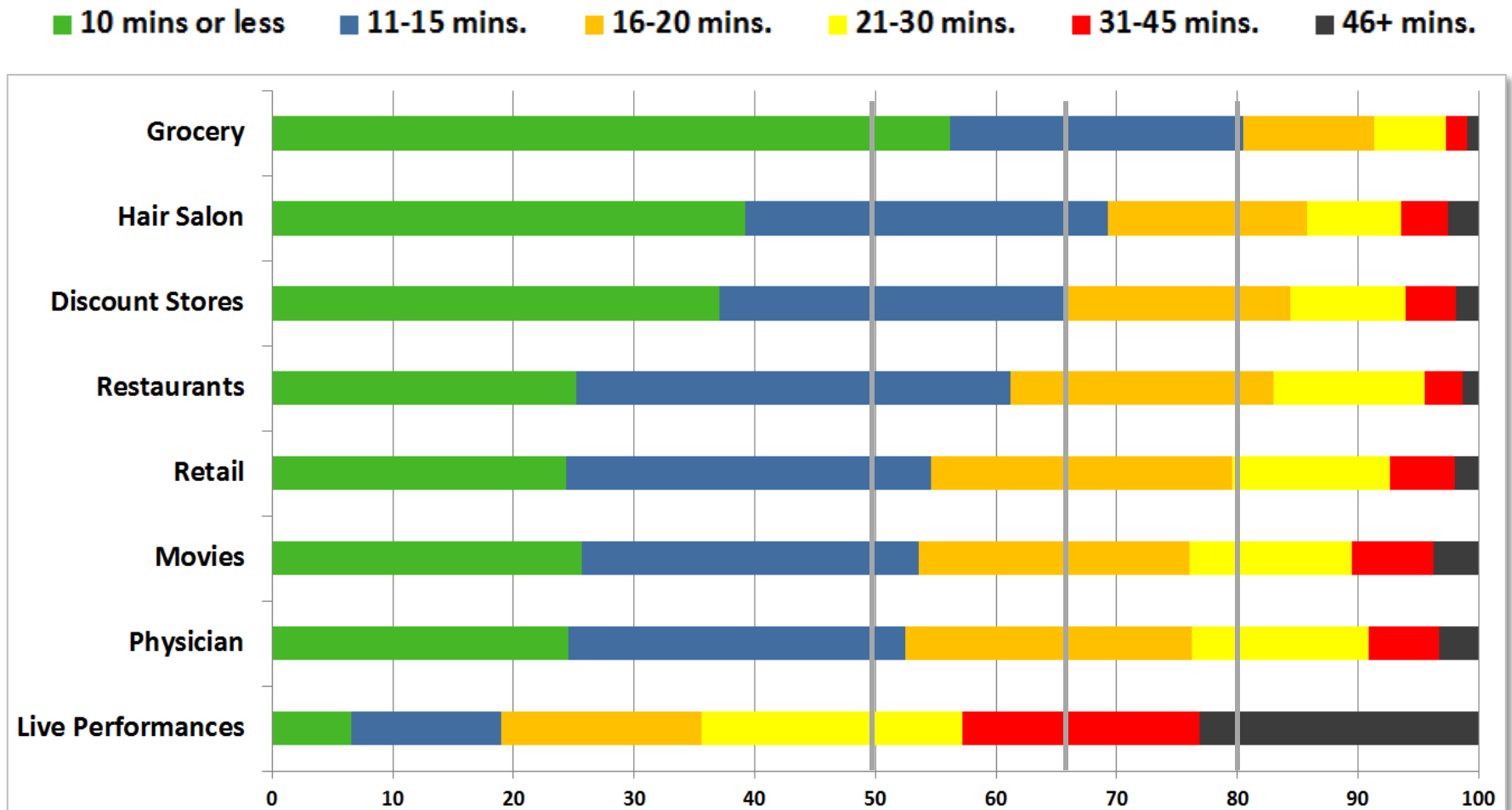
How Consumers Define “Local”

For each of the types of businesses below, how long does it normally take you to travel to the business that you use most often?

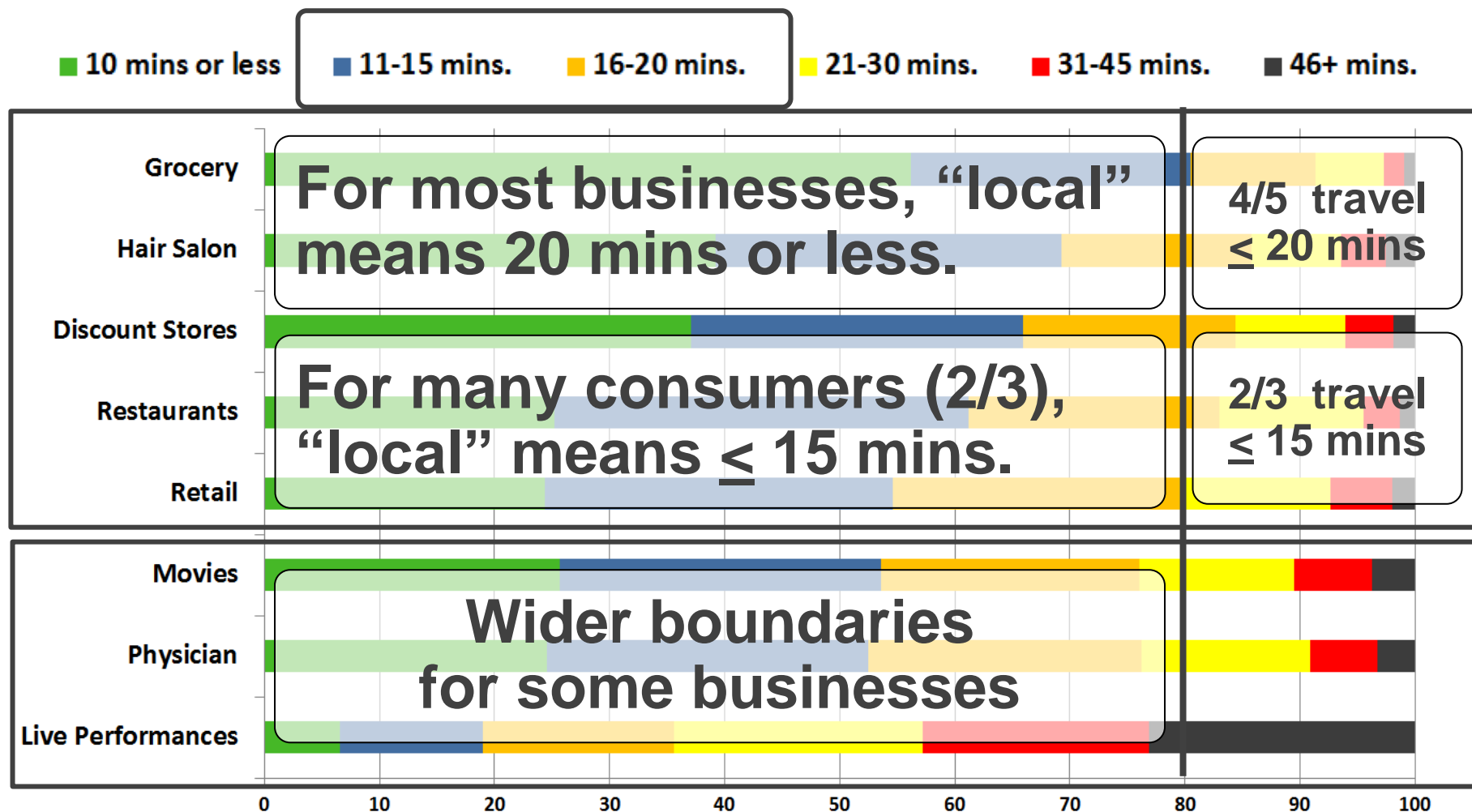
- ☐ 10 mins. or less
- ☐ 11-15 mins
- ☐ 16-20 mins.
- ☐ 21-30 mins.
- ☐ 31-45 mins.
- ☐ 46+ mins.

1. Discount store
2. Grocery store
3. Hair salon-barber shop
4. Live performances
5. Movie theatre
6. Physician
7. Restaurant(s) at which you dine
8. Retail or dept. stores

How Consumers Define “Local”



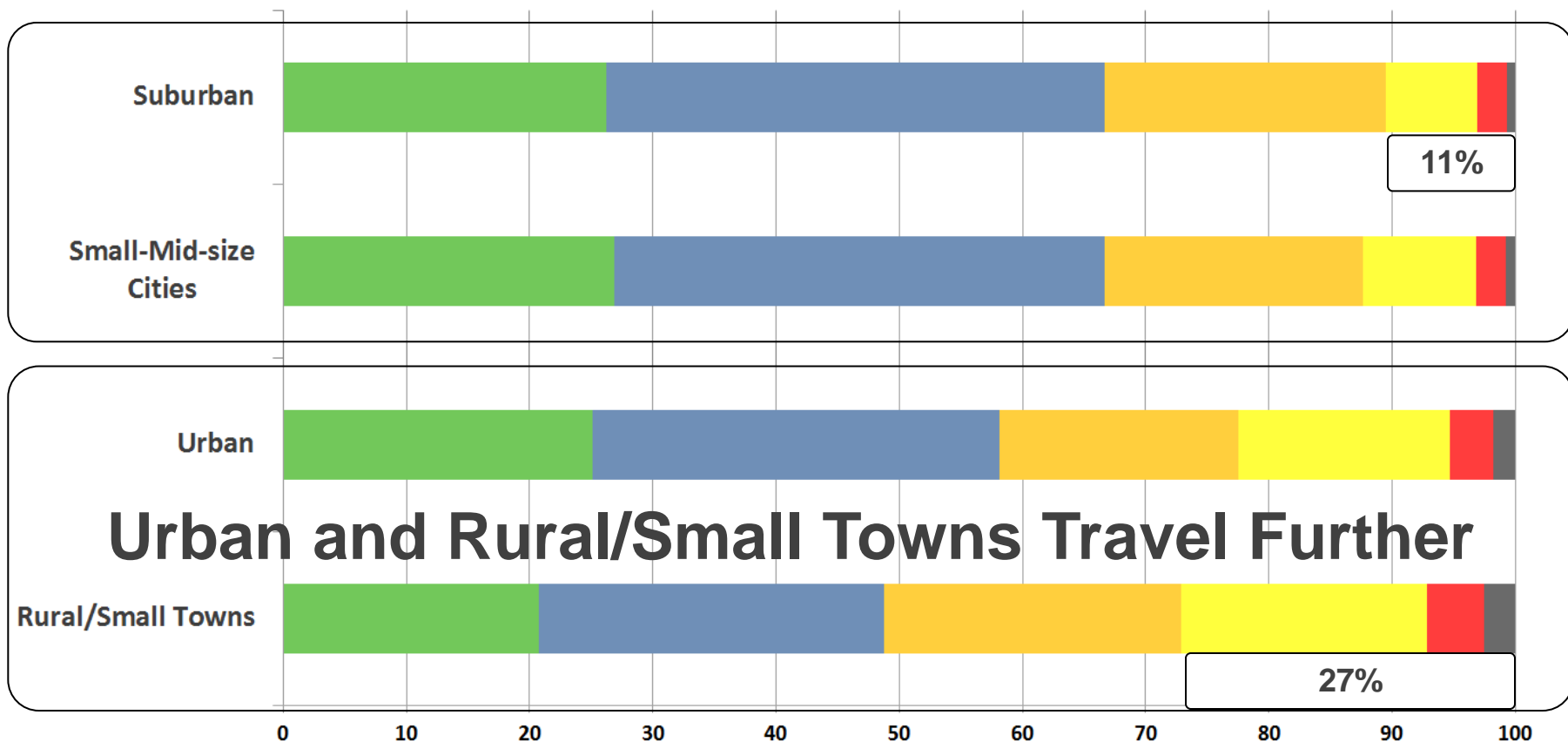
How Consumers Define “Local”



“Local” Varies by Population Density

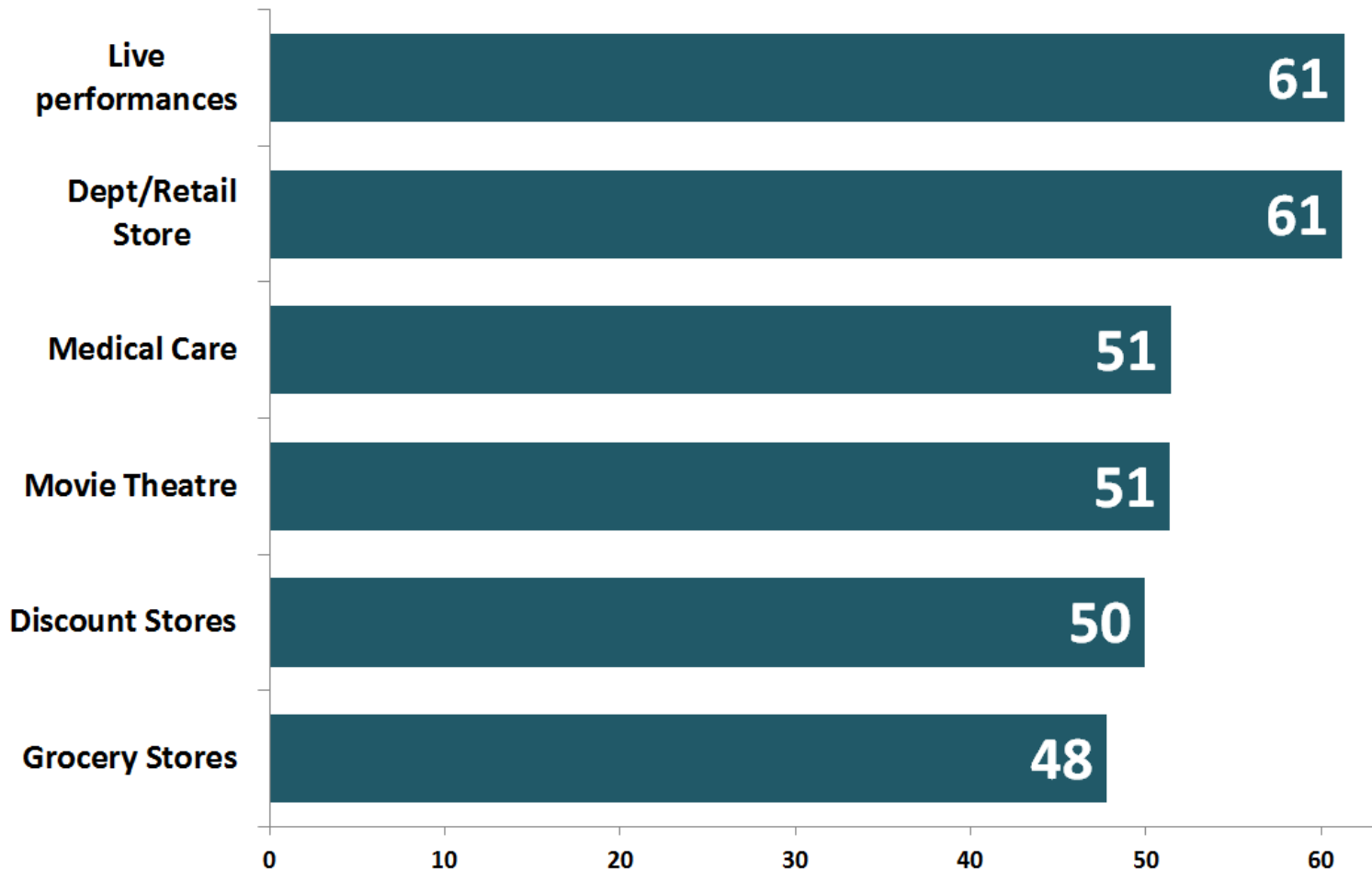
Distance Normally Travel to Restaurant(s)

■ 10 mins or less ■ 11-15 mins. ■ 16-20 mins. ■ 21-30 mins. ■ 31-45 mins. ■ 46+ mins.



“Local” Gets Stretched as Consumers...

Percent Traveling “Further than Usual”



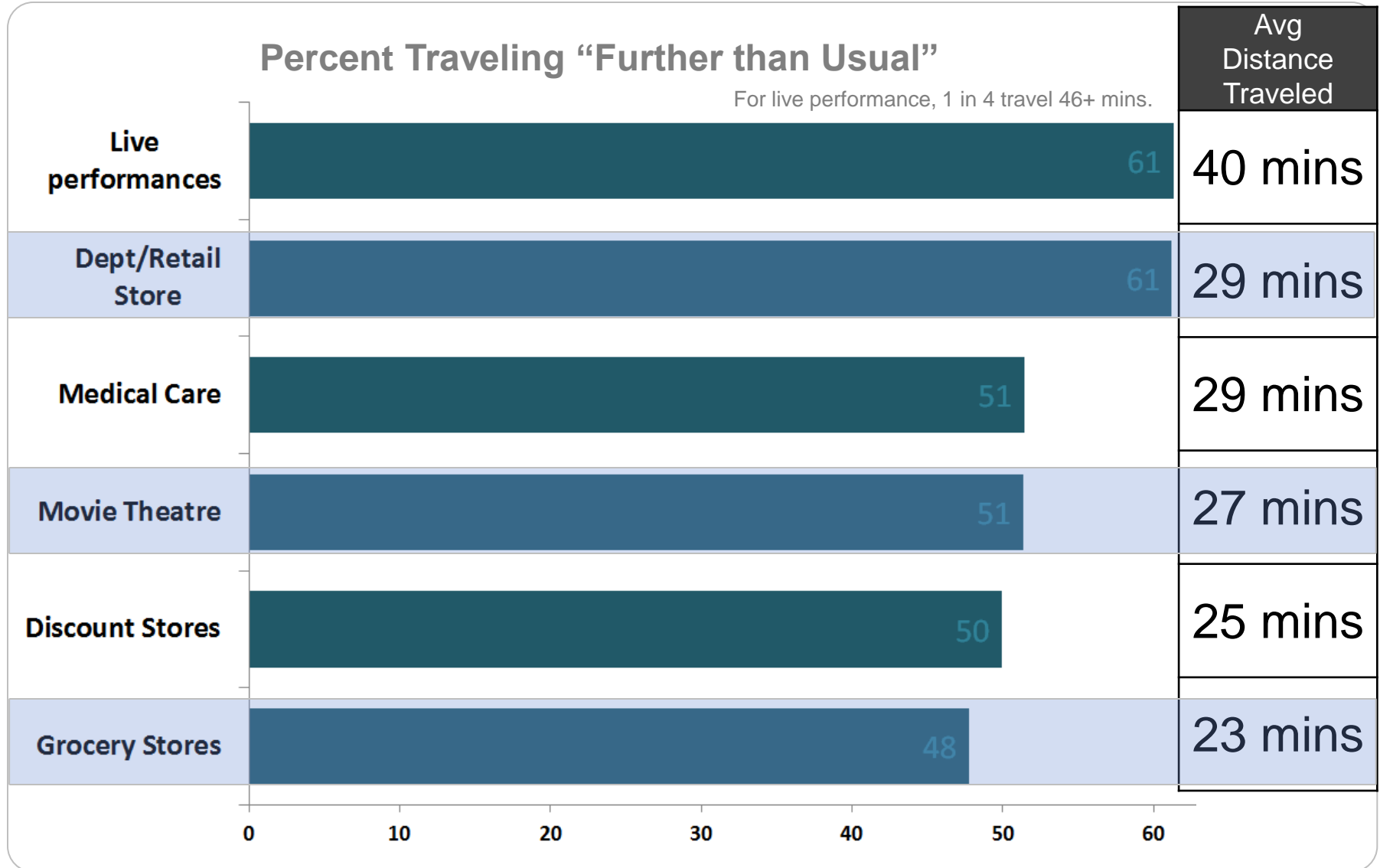
10

Q. In the categories above, within the last 12 months have you traveled to a location that takes longer to get to than the one you usually use? If yes, indicate how long it took to get to the other location

Travel beyond their Usual Boundaries

Percent Traveling “Further than Usual”

For live performance, 1 in 4 travel 46+ mins.

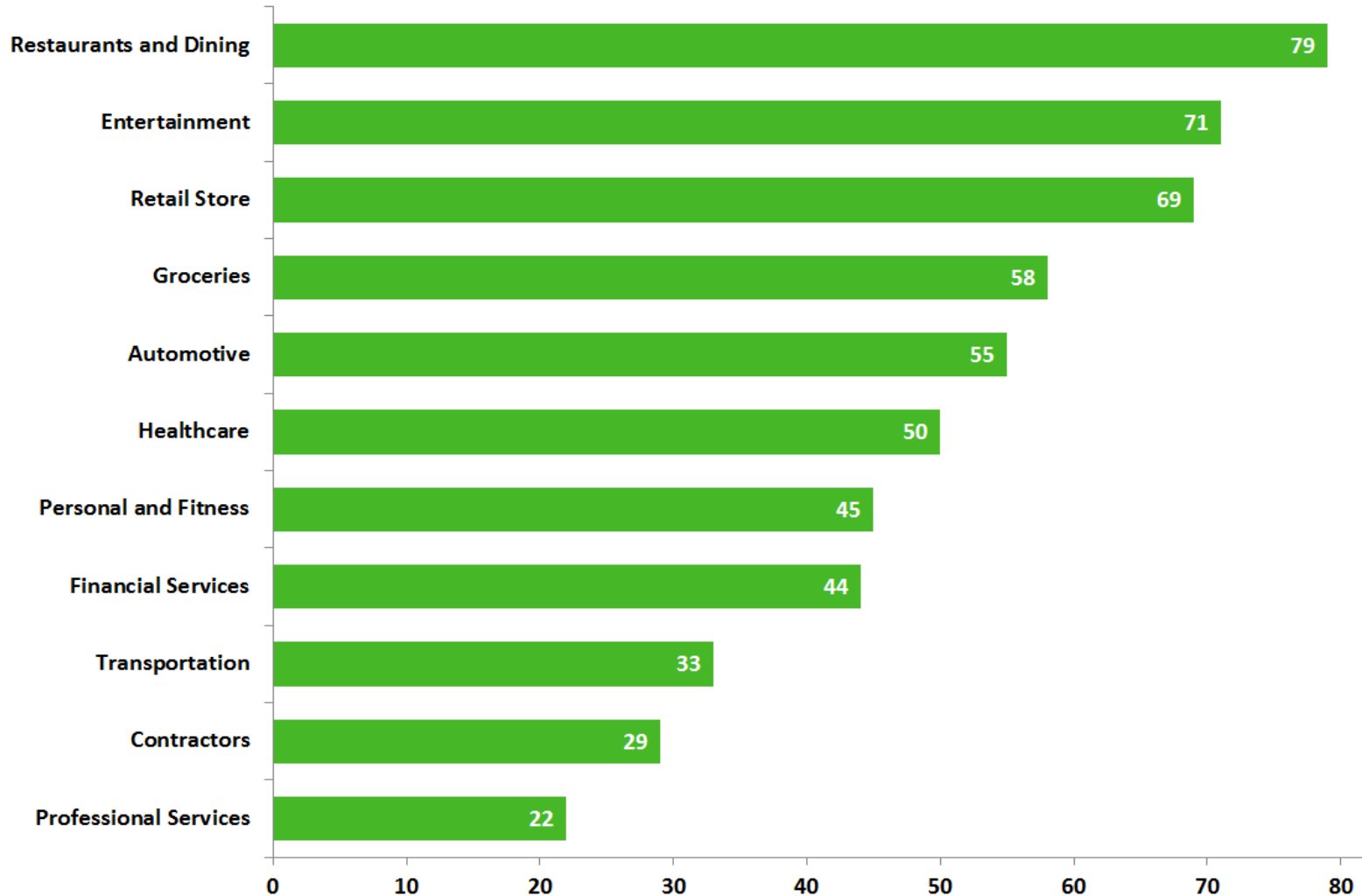


Local Search Patterns

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Search Activity Varies x Business Category

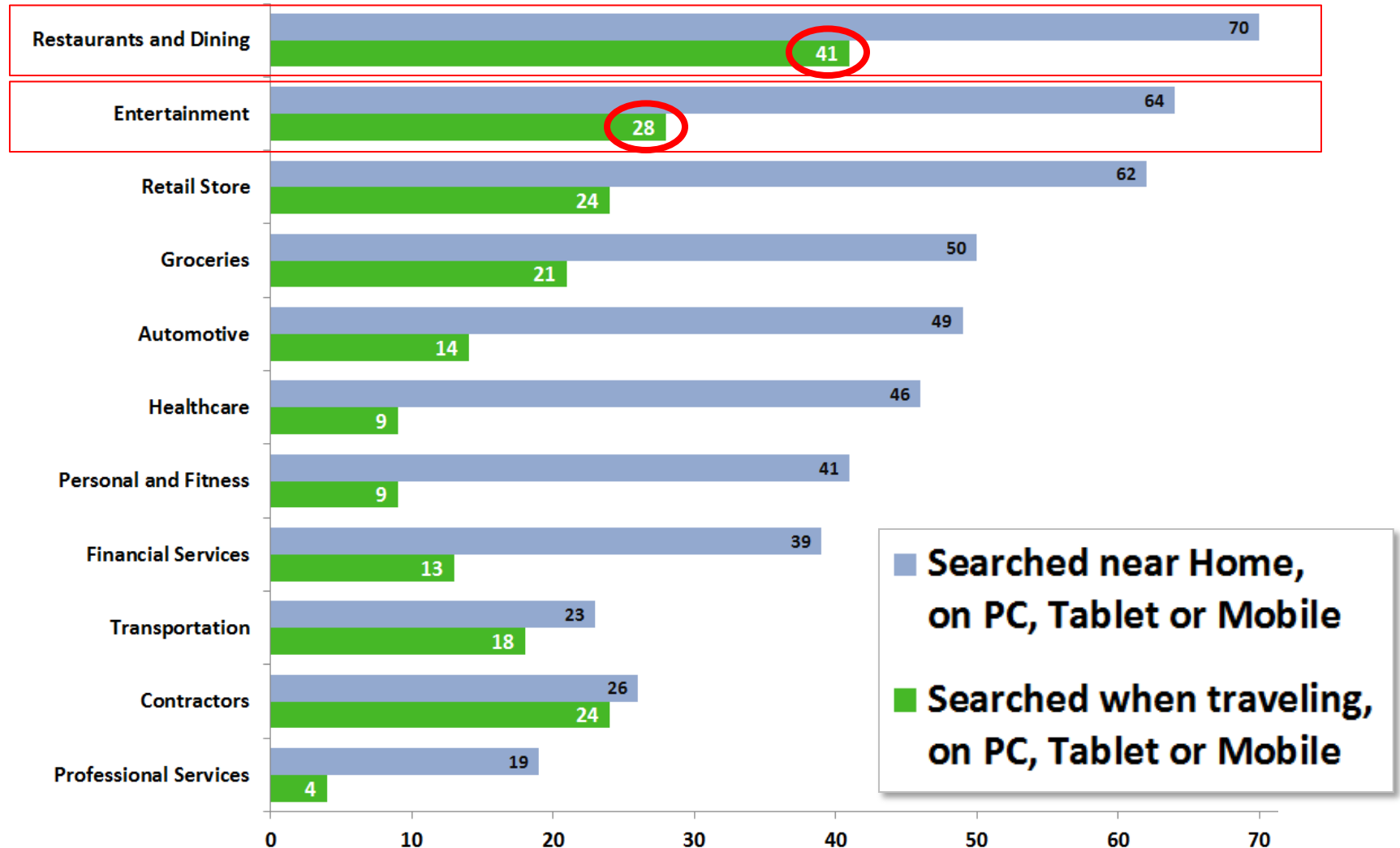
Percent Searched for Type of Business Last 12 Months



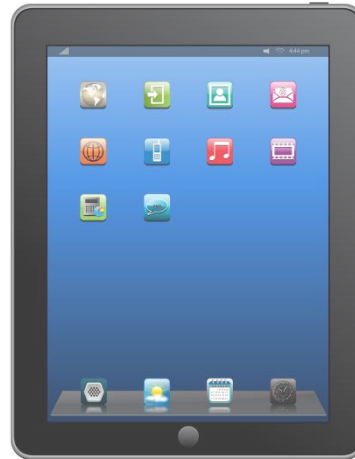
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Local Search “When Traveling” Common

Percent Searched for Type of Business Last 12 Months



Local Search – Across Devices, Places



Categories

Restaurants and Dining

Entertainment

Automotive

Healthcare

Personal and Fitness

Transportation

Groceries

Retail Store

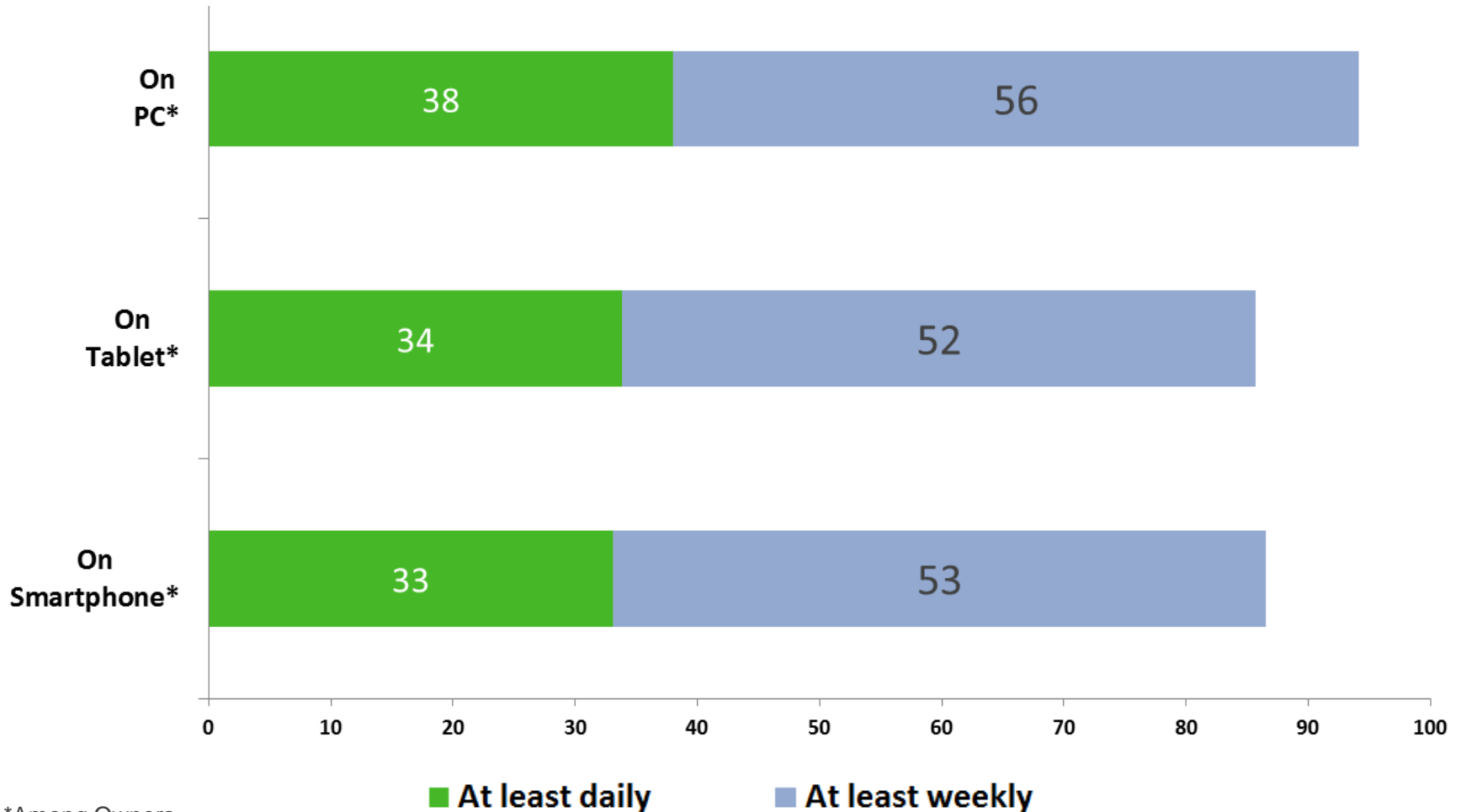
Contractors

Professional Services

Financial Services

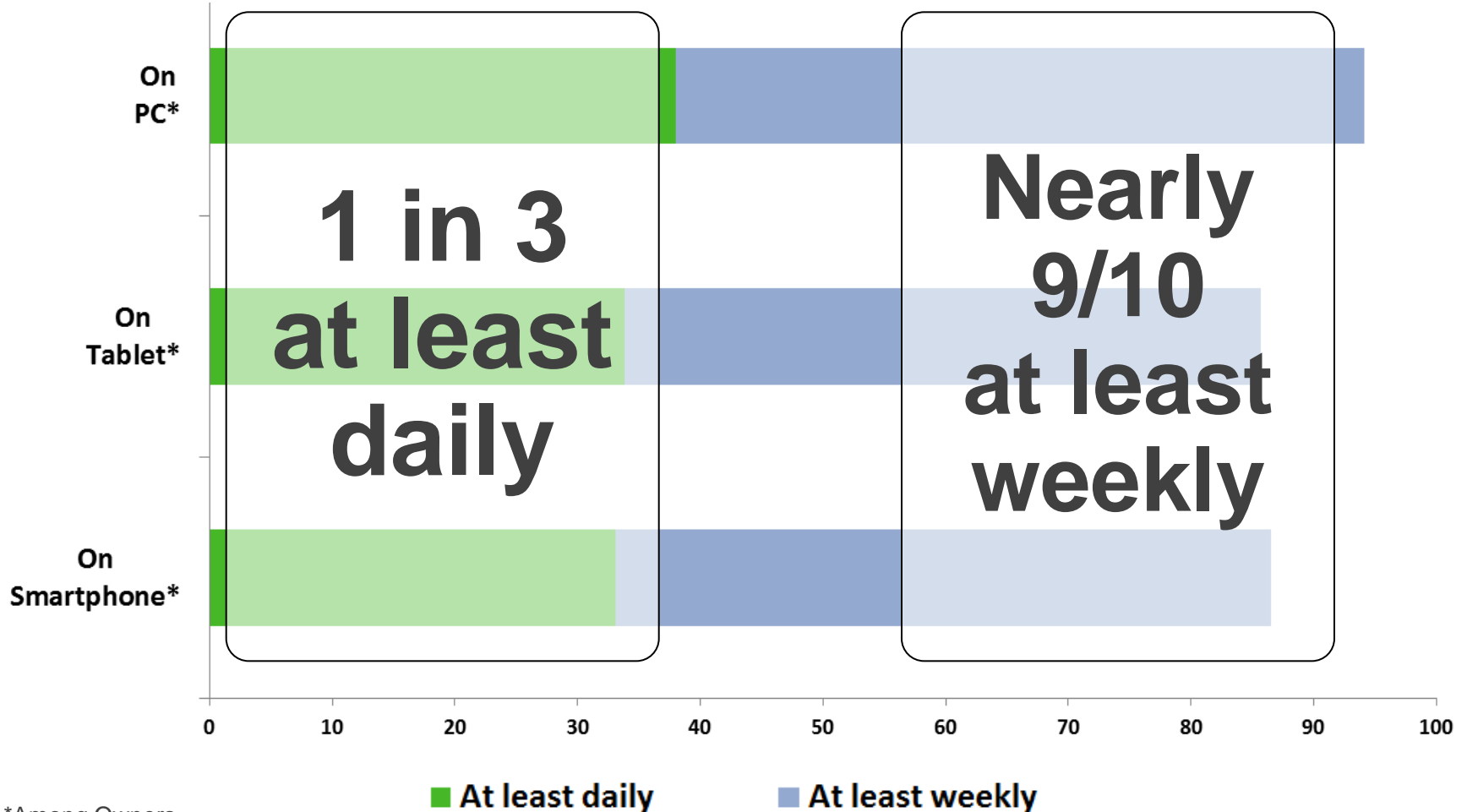
Local Search Common on All Devices

Percent Who Search for Local Businesses –
from Home, Work/School or “Out and About”/Traveling (net)



Local Search Common on All Devices

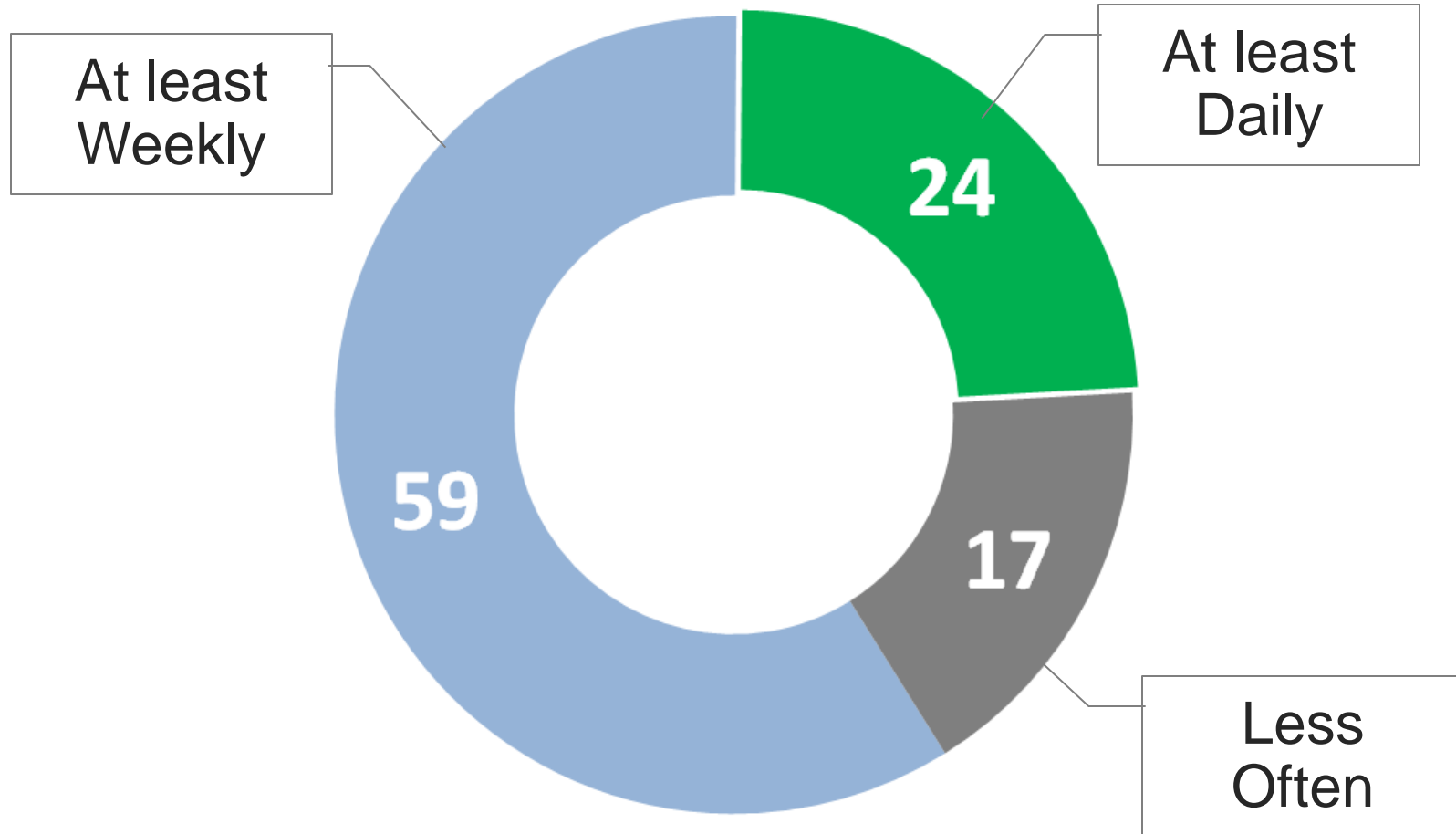
Percent Who Search for Local Businesses –
from Home, Work/School or “Out and About”/Traveling (net)



*Among Owners

Local Search on Smartphone in- and OOH

Percent Who Search for Local Businesses
on Smartphone when “Out and About or Traveling”



For some Businesses, Mobile Matches PC

Percent Searched for Type of Business Last 12 Months

	Searched on PC	Searched on Tablet	Searched on Mobile	Index (PC to Mobile)
Transportation	21	17	23	91
Restaurants and Dining	65	42	60	108
Entertainment	60	39	51	118
Retail Store	61	29	40	153
Groceries	48	25	31	155
Personal and Fitness	37	18	20	185
Financial Services	39	19	21	186
Automotive	47	19	24	196
Professional Services	19	11	8	238
Healthcare	45	17	18	250
Contractors	26	8	9	289

Consumers often seeking “just the facts”

**When
searching for
(business),
what
information
were you
seeking?**

	Restaurants
Map, distance, directions	44%
Hours of operation	42%
Listings/businesses in the area	38%
Address	37%
Prices	35%
Website	34%
Phone number	31%
Ratings, reviews	30%
Promotions/discounts	26%
Product availability	13%
Other	5%

Local Consumers Active on Smartphones

At least weekly, Smart phone owners are...

34%

Clicking on an ad

47%

Reading reviews



21%

Checking-in

29%

Using coupon on their Smartphone

Much More in Forthcoming Reports...



Local Search Insights

Whitepaper (late June)

Dr. Phil Hendrix, immr



Local Consumer Insights

Report (early July)

Dr. Phil Hendrix, immr

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Reports available at www.immr.org

Global Mobile:
Foundations and
Futures

edited by

Peter Bruck and
Madanmohan Rao

Social + Location + Mobile: SoLoMo Analytics and the Transformation of Shopping[†]



The Promise of Hyperlocal: Opportunities for Publishers and Developers

AT&T
Interactive



Tuning into Consumers' Digital Signals

geoiQ



How SoLoMo is Empowering Consumers, Transforming Shopping, and Disrupting Advertising and Retailing



Location – the Epicenter of Mobile Innovation

[†]Forthcoming

Thank you!



- Dr. Phil Hendrix
- Founder and Director, immr
- Analyst, GigaOm Pro
- Research Director, Wireless Innovation Council



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DISCLAIMER / NOTICE:

Please note that the purpose of this presentation is to report on certain findings which came to light as part of a Street Fight and immr study that was recently commissioned by YP (the “Study”). The Study was conducted by immr in May 2012, based on an online audience of volunteer participants. Although YP sponsored the Study for the purpose of obtaining insights into the role of location and distance in search and local decision making, the Study was performed by immr and the outcomes reported here are encapsulations of immr’s findings. The data presented represent strictly the results of answers by eligible, voluntary participants to questions posed by immr. No other means, including any YP assets, were used to confirm responses or collect this data. Unless otherwise noted, all data provided hereafter shall be from the Study - which is proprietary information of YP and/or Street Fight and immr and is not subject to third party confirmation or audit. Any view or conclusion expressed with respect to the charts presented herein are reflections of the data itself and do not necessarily represent the views or opinions of YP or any other affiliate of YP.