

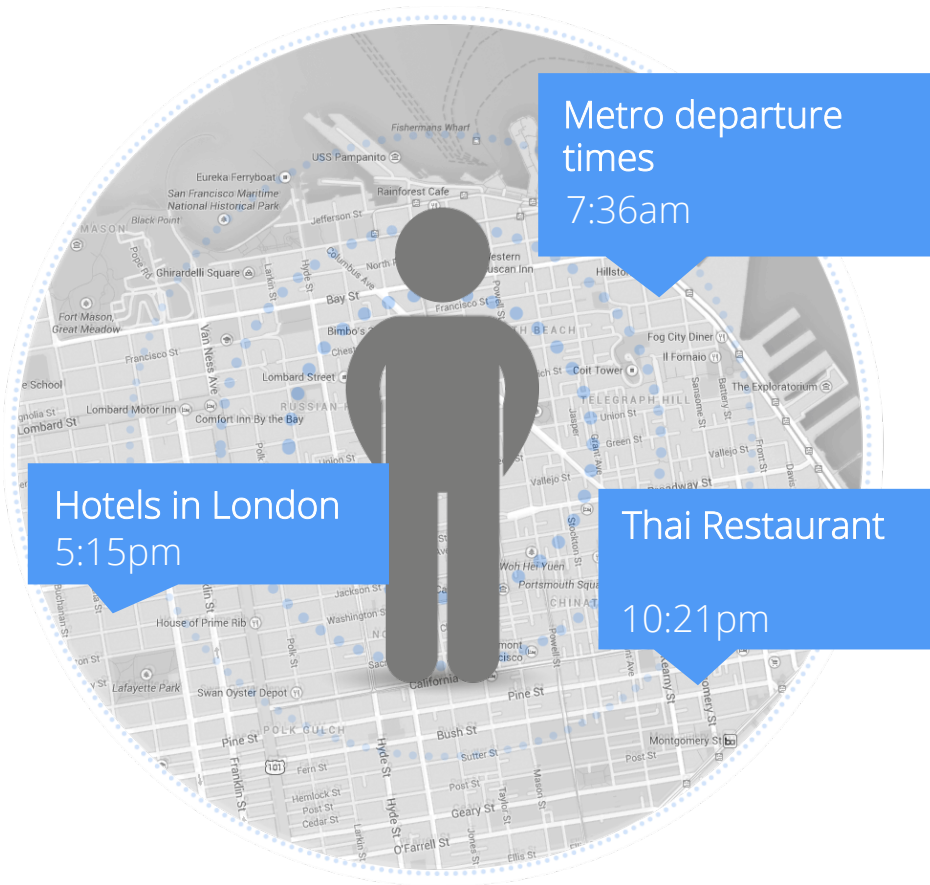
Understanding Consumers' Local Search Behavior



GCS/IPSOS Surveys UK

Hamburg, December 2014

WHAT WE WANTED TO LEARN



Every day, people search for information on different devices. Beside using [general search](#) to search for information in a general matter they are searching especially for things nearby. These [local searches](#) are aimed at finding things near where they happen to be.

In order to gain [insights about consumers' search usage and attitudes](#), the research was inspired and based on previous research by Google, Ipsos and Purchased in US (Understanding Consumers' Local Search Behavior Study).

Compared to earlier research for this study data from the [Ipsos Access Panel was combined with data from Google Consumer Surveys](#) for one [holistic report](#): The Ipsos survey was used as an [umbrella survey](#) to look into general usage and attitudes towards general and local search across devices and verticals. Google Consumer Surveys was used to uncover [vertical specific local search behavior](#).

METHODOLOGY



Ipsos Survey (General survey)



n=500 Smartphone Searcher
outgoing sample representative for
mobile internet user according to
enumeration data allowing derivation
of incidence and structure per vertical



Nov 14th – 25th, 2014
Ipsos Access Panel
LOI: 10 min



GCS Survey (Deep dive: 6 verticals)



n=3000 Smartphone Searcher
6 identical surveys (one for each vertical)
with structure of sample as
per natural fallout



Oct 28th – Nov 16th, 2014
Google Consumer Survey
LOI: 3 min



GCS Data weighted according to structure of Ipsos Survey (gender & age per vertical)



Travel



Finance



Retail



Local



Tech



Media/
Entertainment



Combined analysis and report to uncover consumers' local
search behavior across devices as well as different verticals.

EXECUTIVE SUMMARY



Consumers use search frequently across all devices and verticals

- Local and general search equally important for smartphone search user
- Retail, Media und Travel are searched most often across devices
- Prices are the most relevant information for consumers across all verticals



Local searches help consumers and result in short term actions

- Among local search features, business hours most often searched for across all verticals
- Consumers rather search for information at the beginning of the purchase process and when at home
- Search heavily supports consumers across all verticals and results in actions



Consumers want and act on location-based ads

- 2 in 3 consumers want ads customized to their city, zip code or immediate surroundings
- 86% have taken an action after seeing an ad

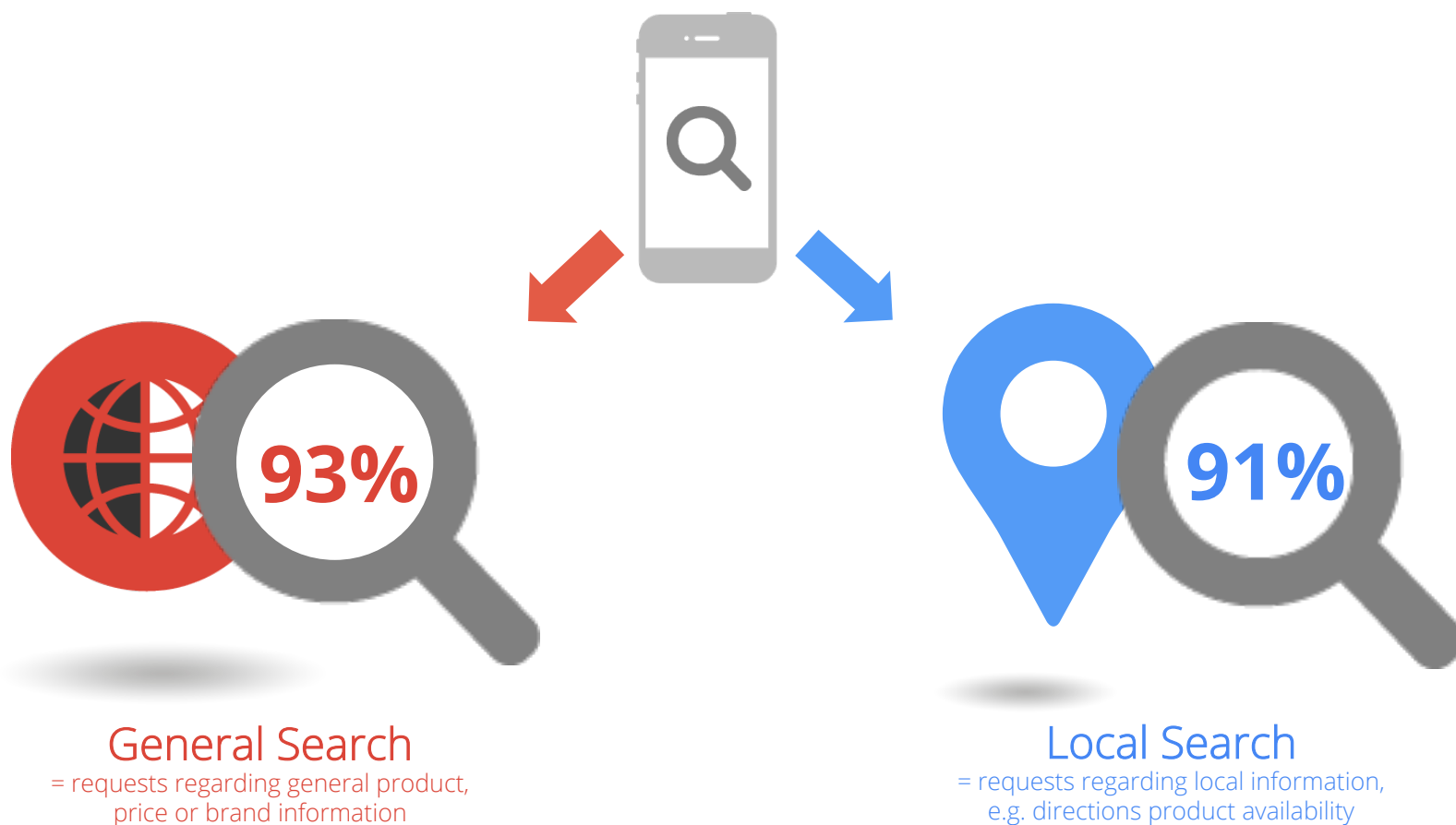
CONTENTS

- 1 General search behaviour
- 2 The prominence of local search
- 3 Situation and Influence of Search
- 4 Engaging consumers with location-based ads
- 5 Profile of search user

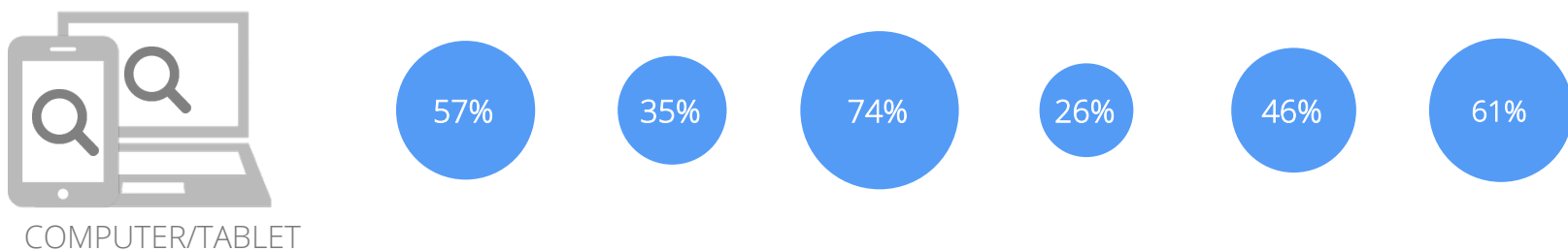
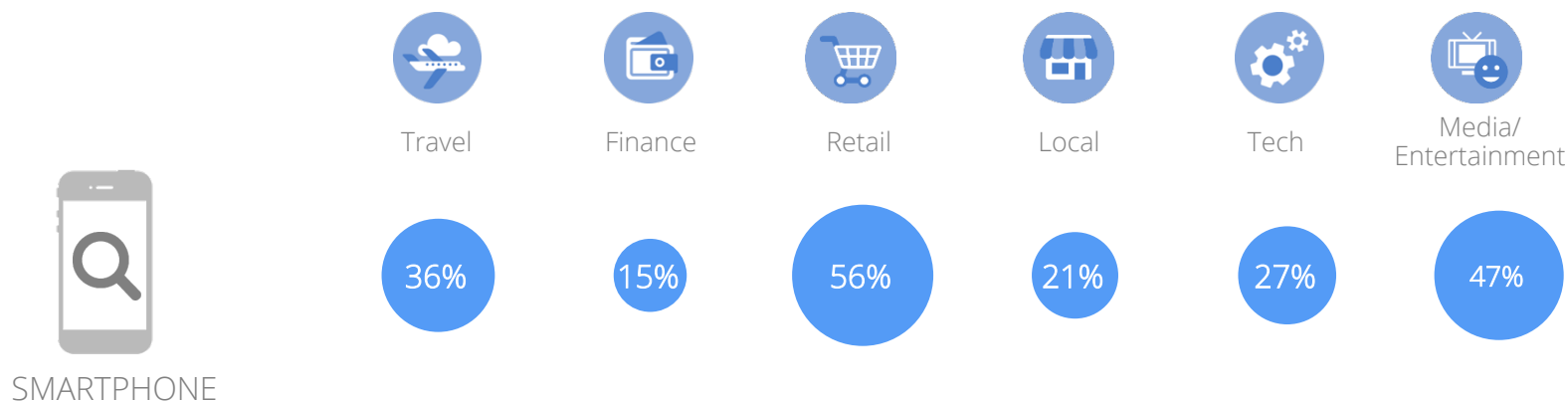


GENERAL SEARCH BEHAVIOR

Local and general search equally important for smartphone search user



Search most important for retail: 56% used it on smartphone before purchase





General search used by 9 in 10 on mobile and by nearly all on computer/tablet

At least one



Pricing



Further details



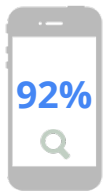
Reviews



Other brands



Service/Warranty



SMARTPHONE

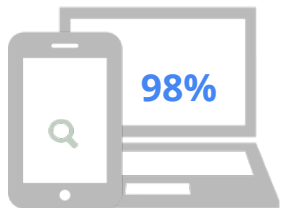
73%

59%

48%

33%

5%



COMPUTER/TABLET

86%

75%

70%

52%

13%

What we learned

Consumers use general and local search frequently across all devices and verticals.

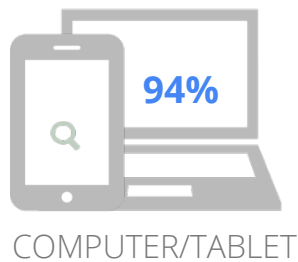
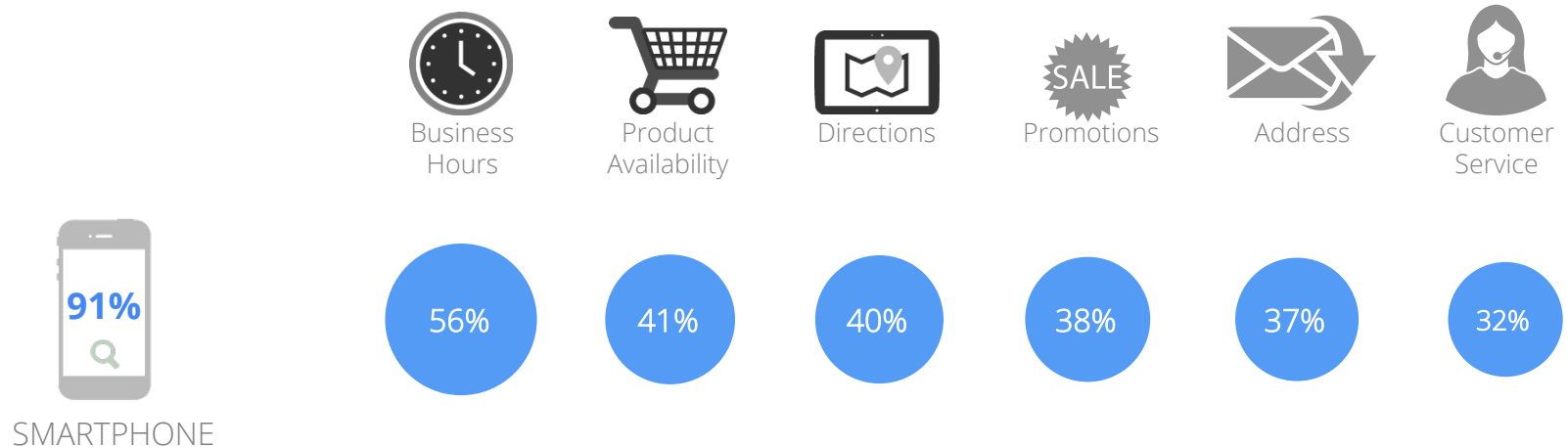
Advertiser implications

You should make sure product prices as well as ratings and reviews are integrated in your ad to deliver the most relevant information for consumers at a glance.

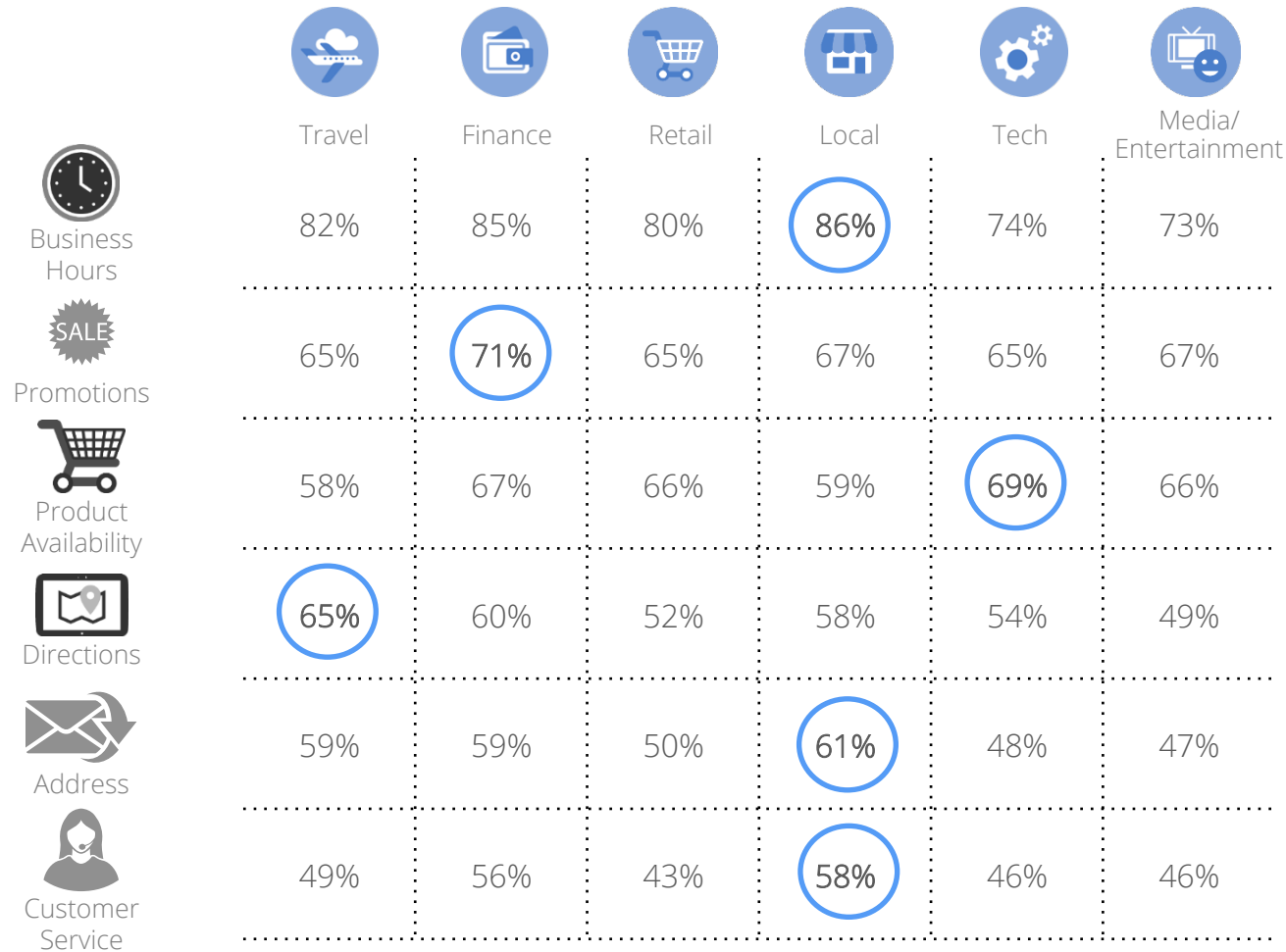
THE PROMINENCE OF LOCAL SEARCH



In general: Local search used by 9 in 10 consumers on a smartphone



Specific verticals: Business hours most often searched for across all verticals



 Top mention per category

What we learned

Local searches help consumers to solve immediate problems

Advertiser implications

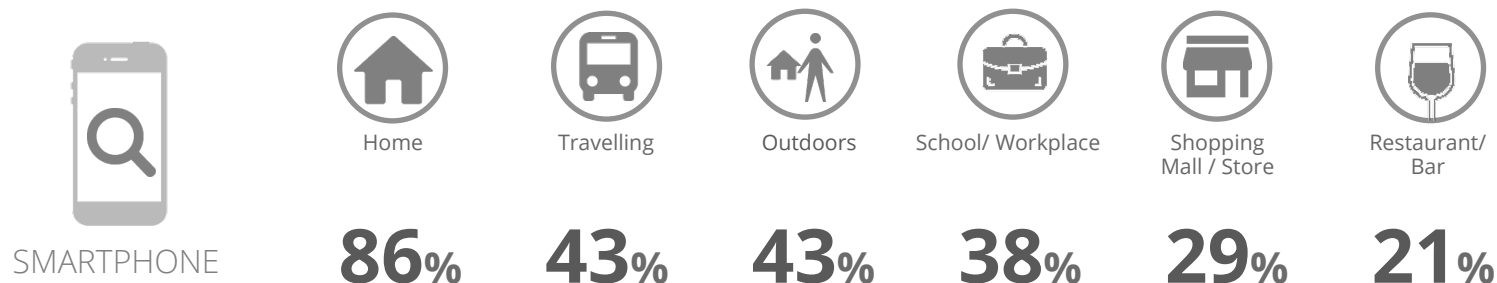
Product availability in the store, as well as address/ directions become key drivers for an purchase.



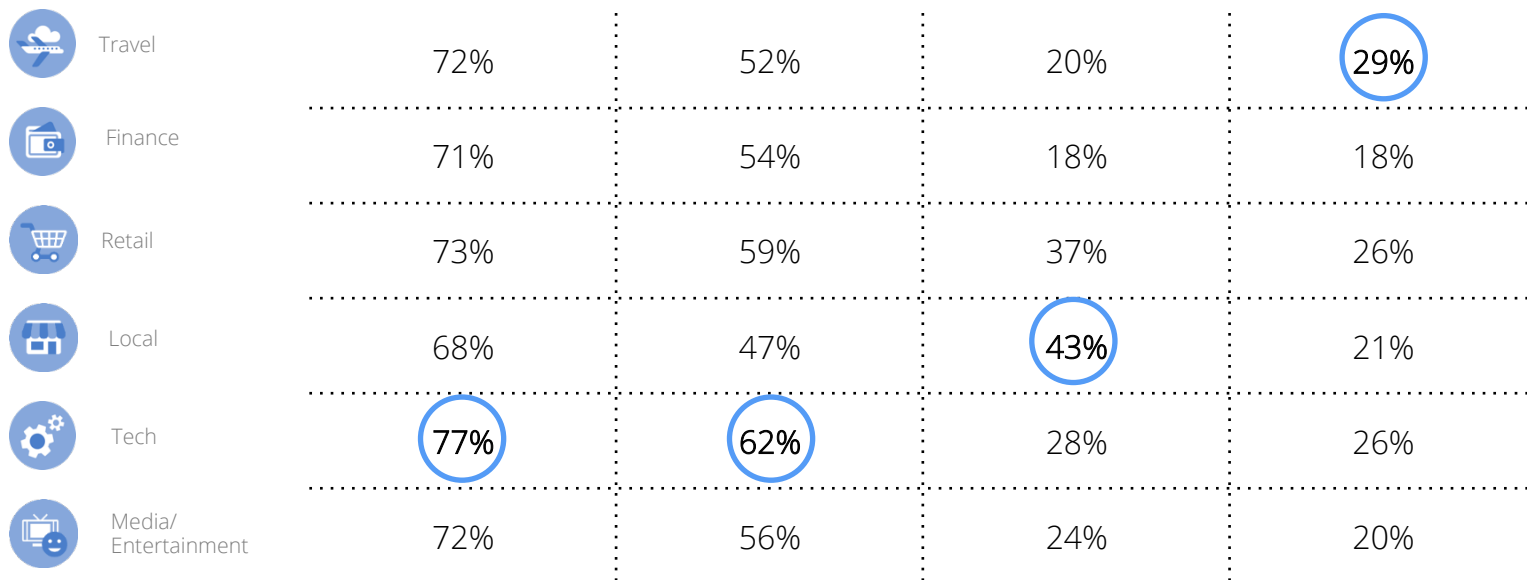
SITUATION AND INFLUENCE SEARCH

Consumers conduct searches in a variety of places but mainly at home

% of consumers who search for information at:



Consumers rather search for information at the beginning of the purchase process



○ Top mention per purchase phase

Search heavily supports consumers across all verticals and results in actions



State that the web search(es) strongly helped to decide what product or service to buy in the end

(values 8-10 on a scale from 1 (not at all) to 10 (completely))



47%

take a follow up action within 1 hour after search



Travel

47%



Finance

46%



Retail

42%



Local

51%



Tech

46%



Media/
Entertainment

48%

What we learned

Searches result in short term actions

Advertiser implications

Consumers search mainly at home but act quickly after their search.

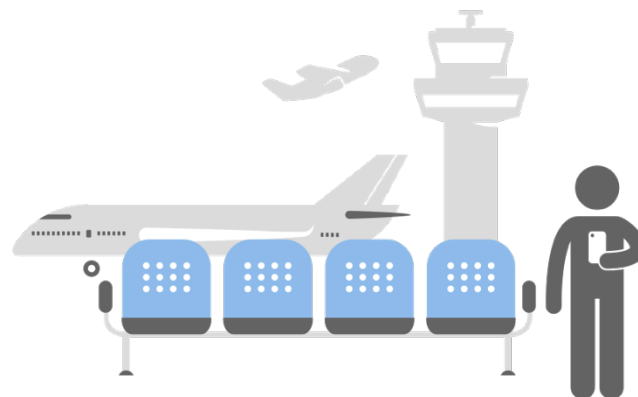


ENGAGING CONSUMERS WITH LOCATION-BASED ADS

Consumers want ads to be customized to their location

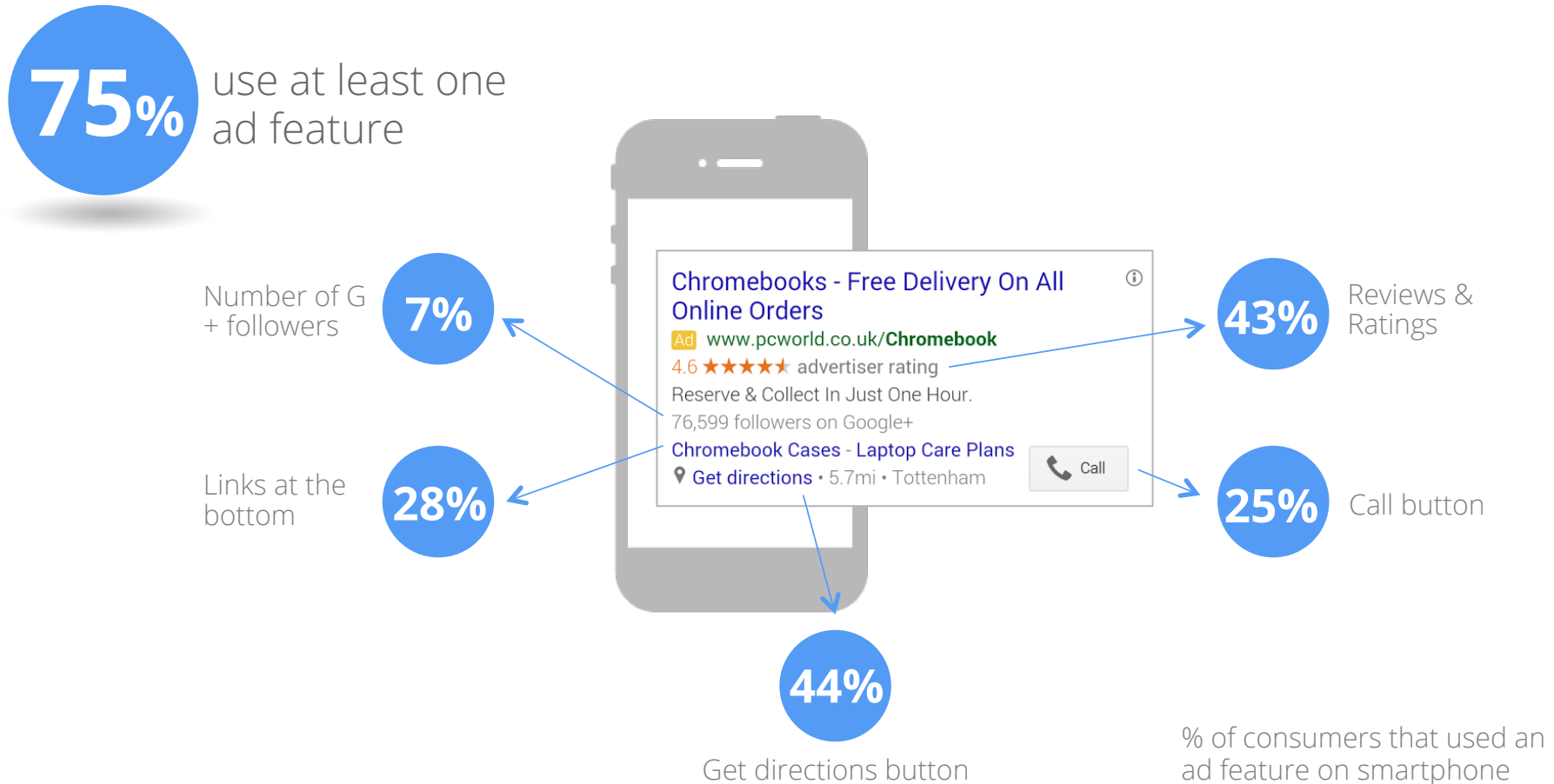


63% of Smartphone user
61% of Computer/Tablet user
want ads customized
to their *city/zip code*



62% of Smartphone user
61% of Computer/Tablet user
want ads customized to their
immediate surroundings

Get directions button most used ad feature on smartphone



Reviews & Phone number top ad feature on computer/tablet

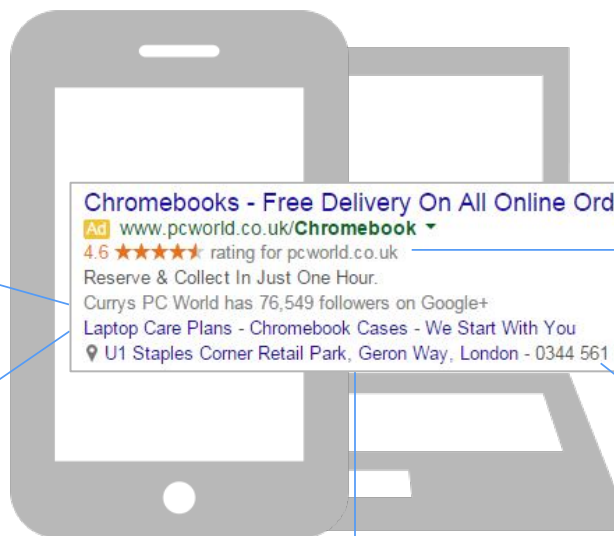
75% use at least one ad feature

Number of G+ followers

8%

Links at the bottom

29%



43%

Reviews & Ratings

39%

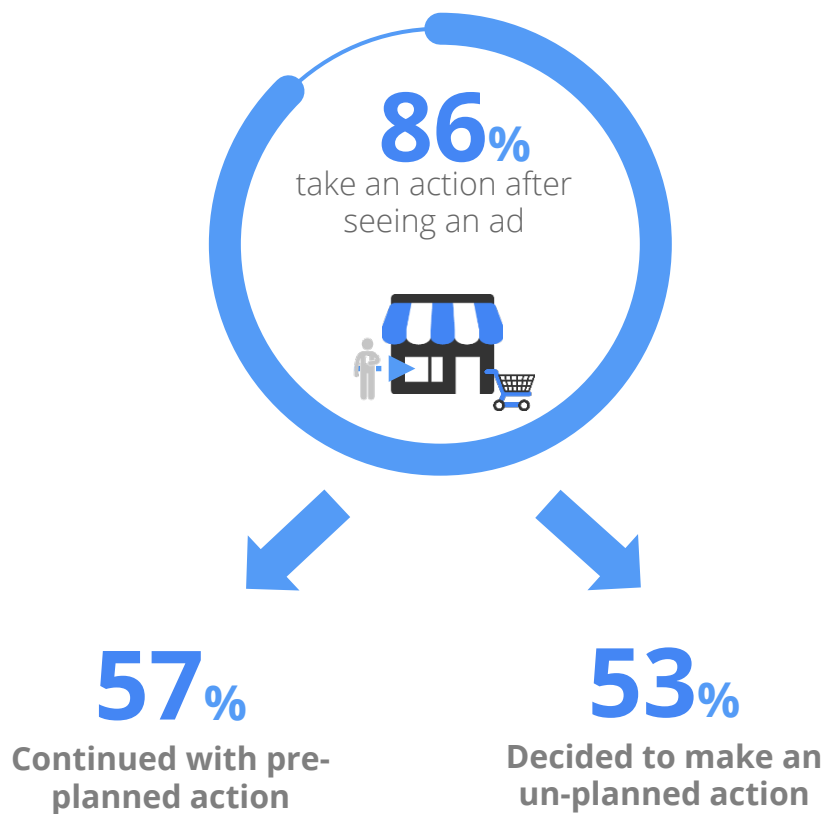
Phone Number

38%

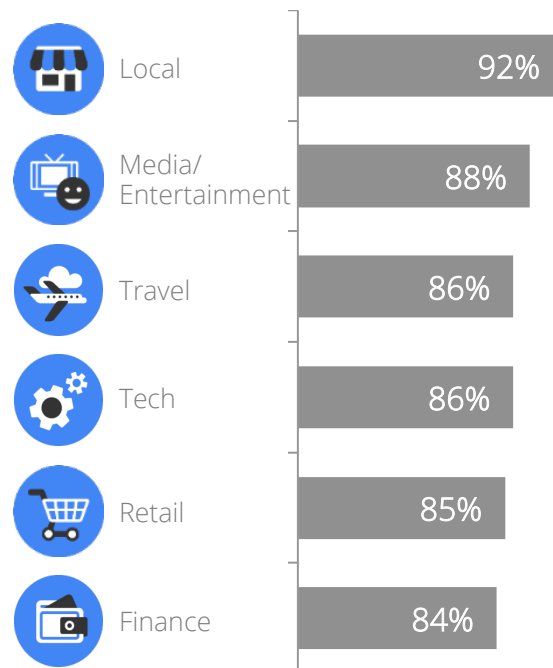
Local Address

% of consumers that used an ad feature on computer/tablet

Location-based ads lead consumers to visit stores or make purchases



% of consumers taken an action after seeing an ad:



What we learned

Consumers use location-based ads and expect ads to be relevant to their location.

Advertiser implications

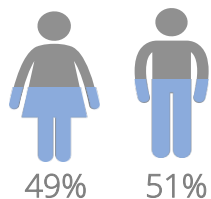
Ads need to be customized to surrounding and post-code of searchers. Ratings are a key ad feature and result - in combination with localized information - in store visits and purchases.



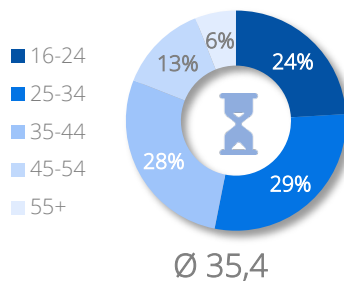
APENDIX 1: PROFILE OF SEARCH USER

Search user are highly digital and keen to socialize and consume

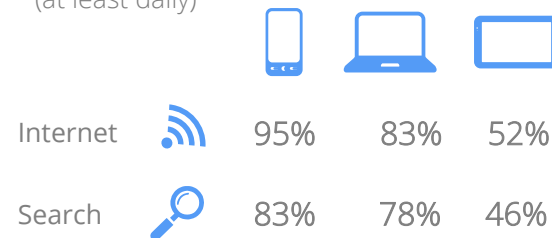
Gender



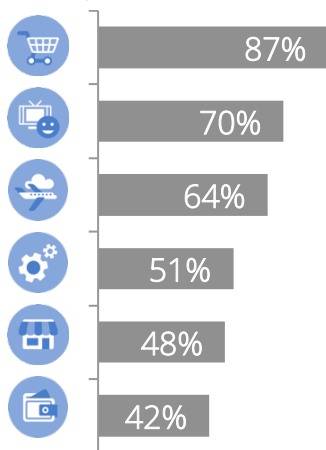
Age



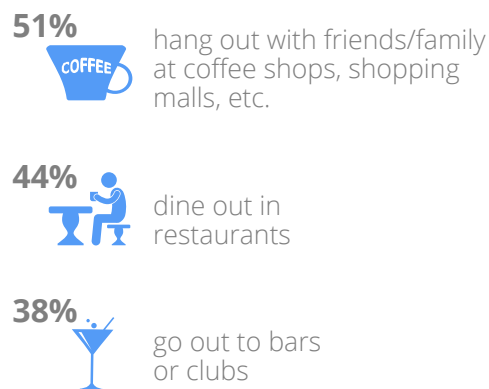
Internet and Search Usage (at least daily)



Purchase (in the past 6 months)



Leisure activities (at least a few times a month)



Shopping behavior (at least a few times a month)



Profiles of search user differ across verticals



Travel

2.5x more likely than
finance user to be **16-24**
years



2x more likely than retail/
media user to **buy**
electronics



Finance

1.9x more likely than
travel/retail/media user
to **buy electronics**



1.7x more likely than
tech user to **buy fashion**



Retail

2.7x more likely than
finance user to be **16-24**
years



1.6x more likely than
tech user to be **female**



Local

1.6x more likely than
tech user to be **female**



1.5x more likely than
tech user to **buy personal**
care products



Tech

2.4x more likely than
finance user to be **16-24**
years



1.6x more likely than
retail user to be **male**



Media/Entertainment

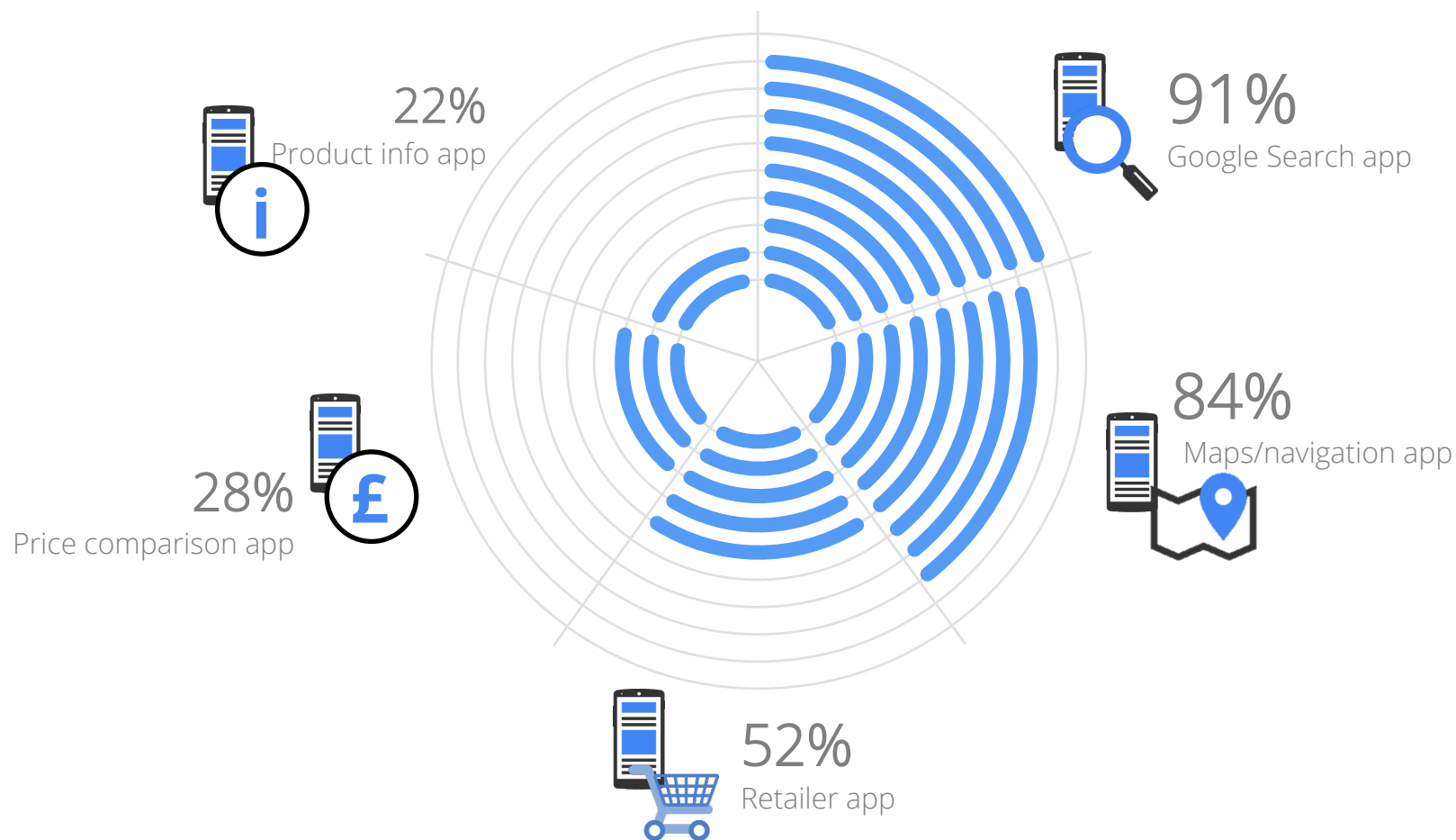
2.8x more likely than
finance user to be **16-24**
years



1.4x more likely than
tech user to be **female**



Google Search and Maps most used apps

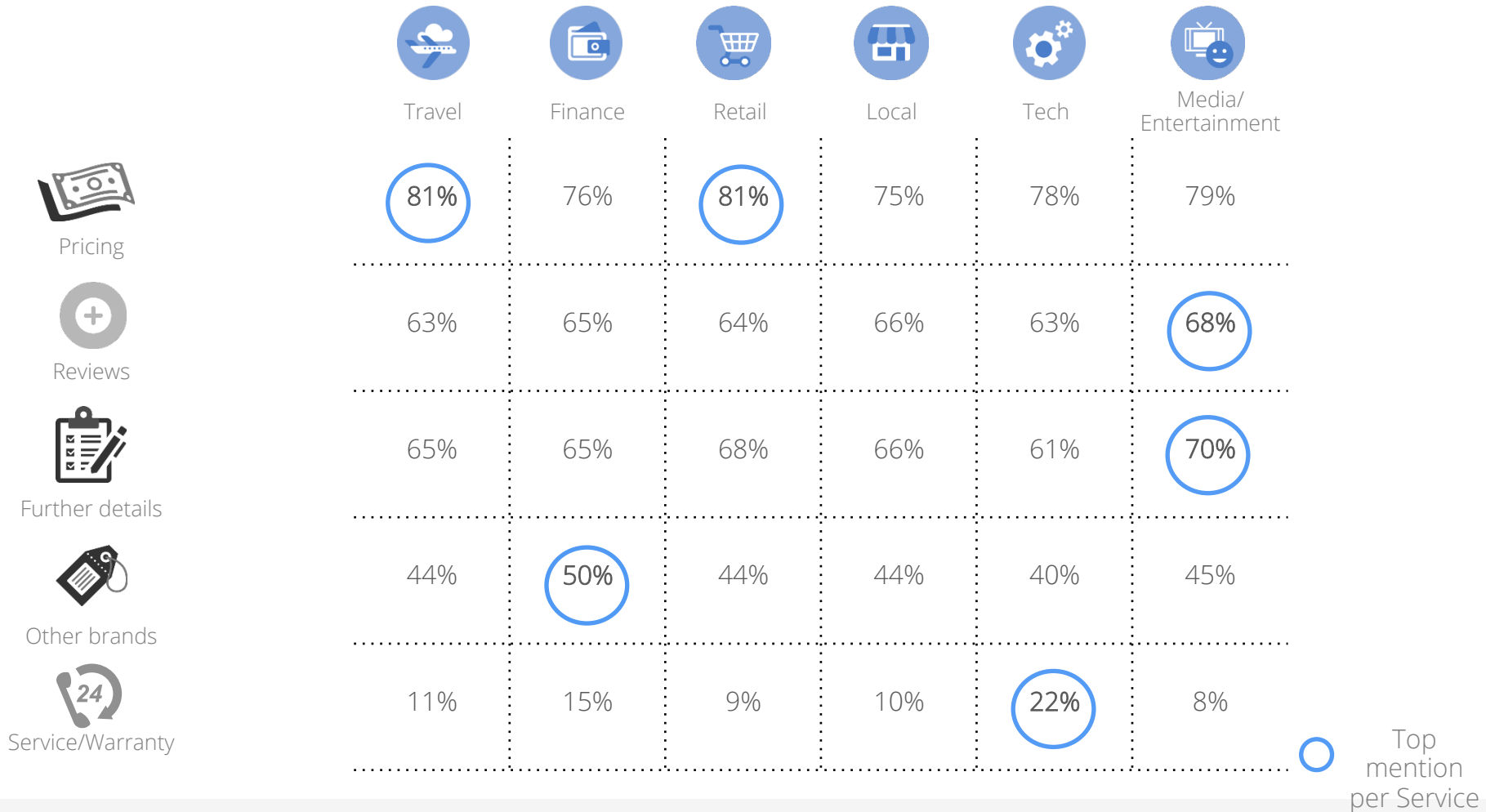




APENDIX 2: PRODUCT CATEGORY INSIGHTS

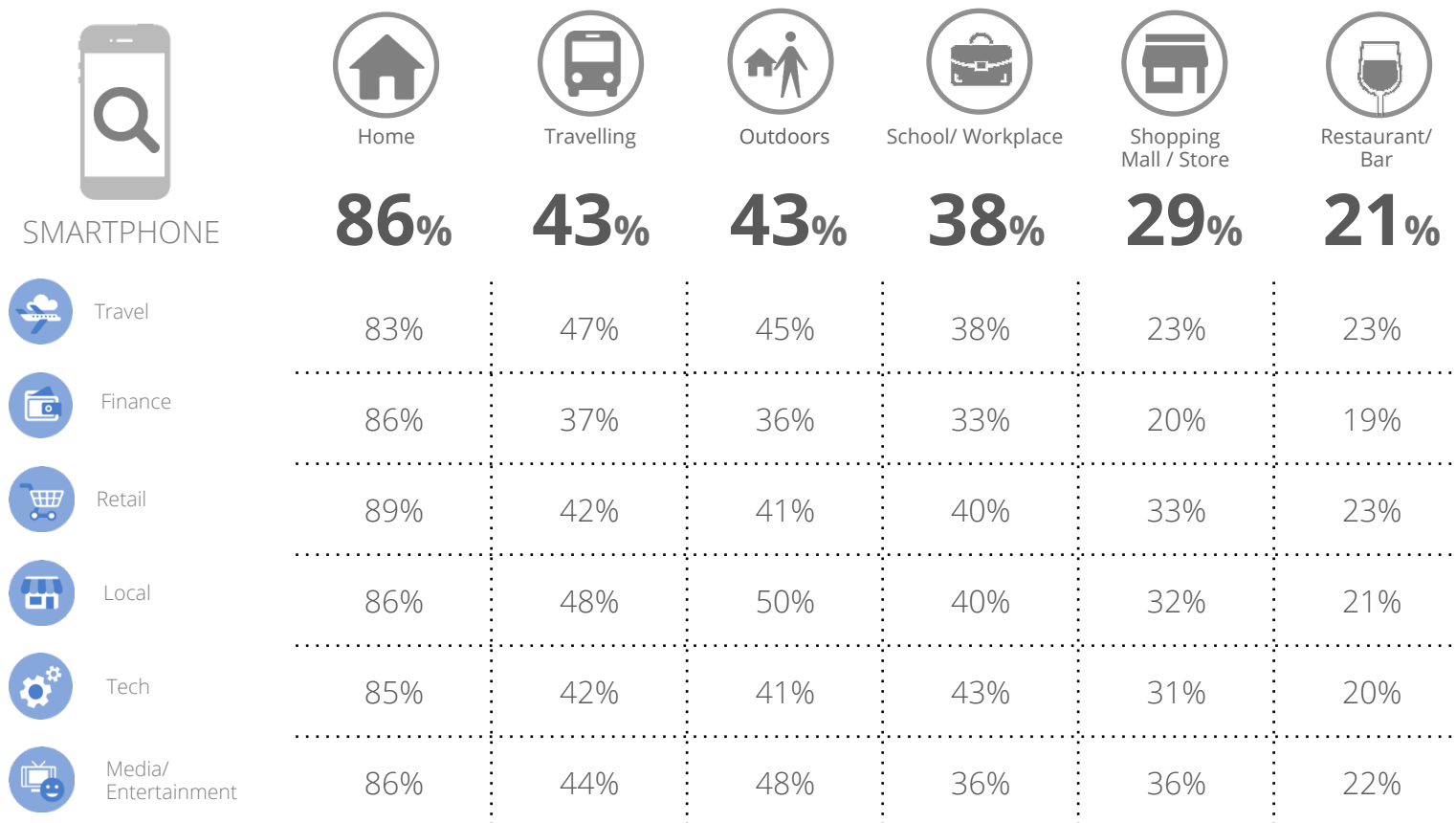


Prices are the most relevant information for consumers across the 6 verticals



Consumers conduct searches in a variety of places but mainly at home

% of consumers who search for information at:



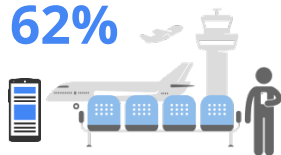
Customization is desired across verticals, but mostly for Local, Travel and Finance

63%



customized to
city/post code

62%



customized to
immediate surroundings



Travel

68%



Finance

66%



Retail

63%



Local

72%



Tech

66%



Media/
Entertainment

66%

69%

69%

61%

71%

60%

63%



APENDIX 3: METHODOLOGICAL INSIGHTS

METHODOLOGY

What we learned

Combination of GCS and Ipsos data is a good way to enrich classic online study designs.

Research implications

Google Consumer Surveys are ideal for a limited number of in depth questions in addition to an extend online survey

Future Use Cases

Suitable for hard to reach target groups or consumers with a very low incidence where reference data for weighting is available