

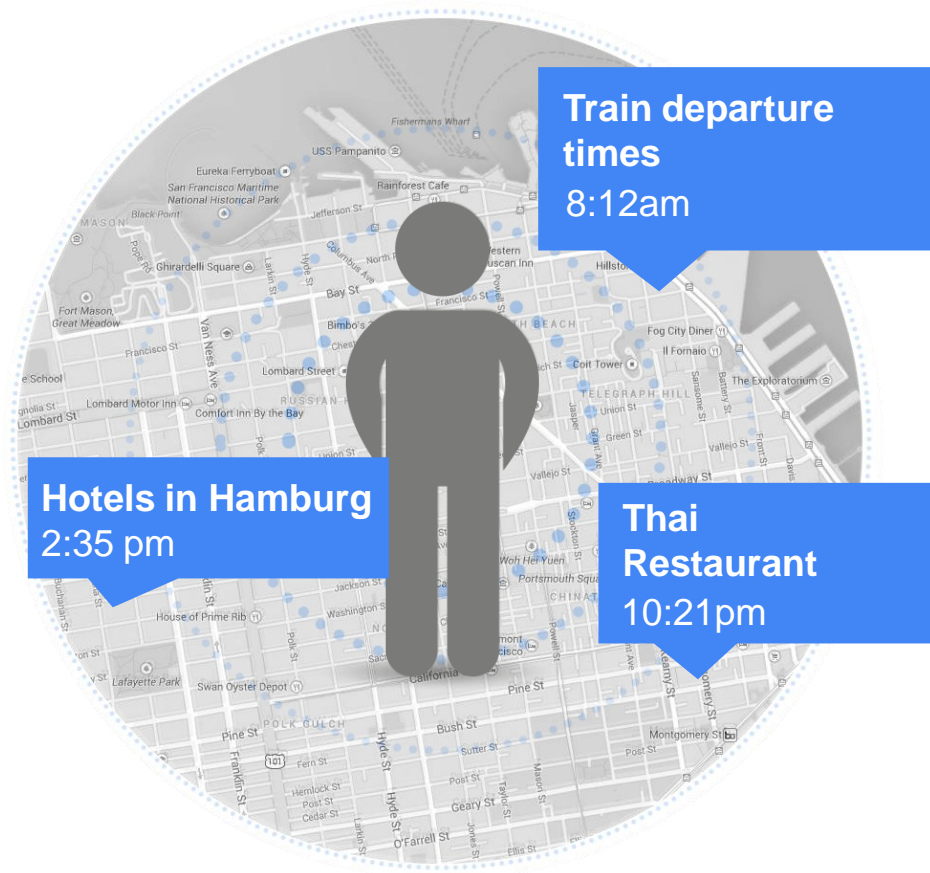
Understanding Consumers' Local Search Behavior



GCS/IPSOS Surveys DE

Hamburg, January 2015

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 Purchared 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 (Umbrella 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 21st – Dec 2nd 2014
- Ipsos Access Panel
- LOI: 10 min



GCS Survey (Deep dive per vertical)



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



- Nov 25th – Nov 27th, 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 and Tech 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, local addresses and directions most often searched for across all verticals
- Consumers search for information during all steps of the purchase process and mainly when they are at home
- Search heavily supports consumers across all verticals and results in actions



Consumers want and act on location-based ads

- More than half of the consumers want ads to be customized to their city, zip code or immediate surroundings
- 8 in 10 consumers have taken an action after seeing an ad

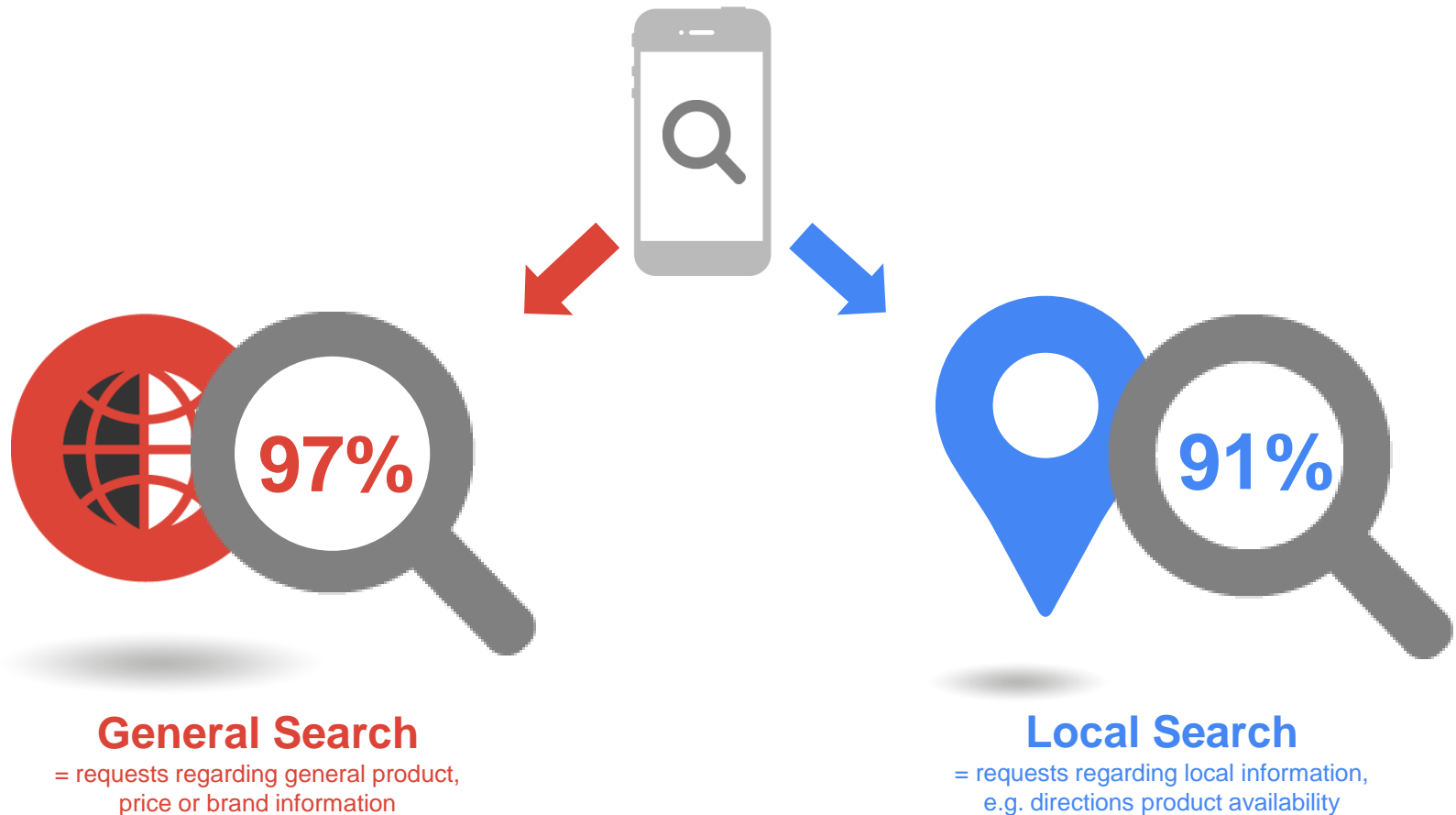
CONTENTS

- 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 search nearly as important as general search for mobile search user



Search most important for retail: 51% used it on smartphone before purchase



SMARTPHONE



Travel

27%



Finance

14%



Retail

51%



Local

16%



Tech

39%



Media/
Entertainment

46%



COMPUTER/TABLET

48%

28%

72%

18%

60%

59%





Nearly all search user conduct general search across all their devices

At least one



Pricing



Reviews



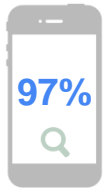
Further details



Other brands



Service/Warranty



SMARTPHONE

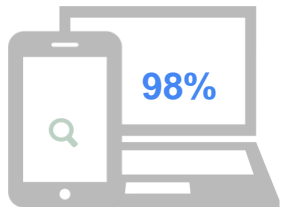
79%

52%

51%

32%

9%



COMPUTER/TABLET

87%

72%

70%

55%

26%

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 on a smartphone



VERTICAL
INDEPENDENT



Business
Hours



Directions



Promotions



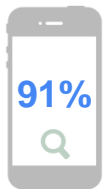
Address



Customer
Service



Product
Availability



91%



SMARTPHONE

62%

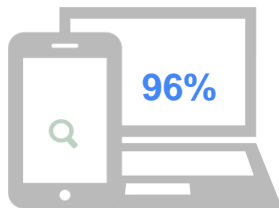
45%

43%

43%

26%

25%



96%



COMPUTER/TABLET

66%

45%

59%

50%

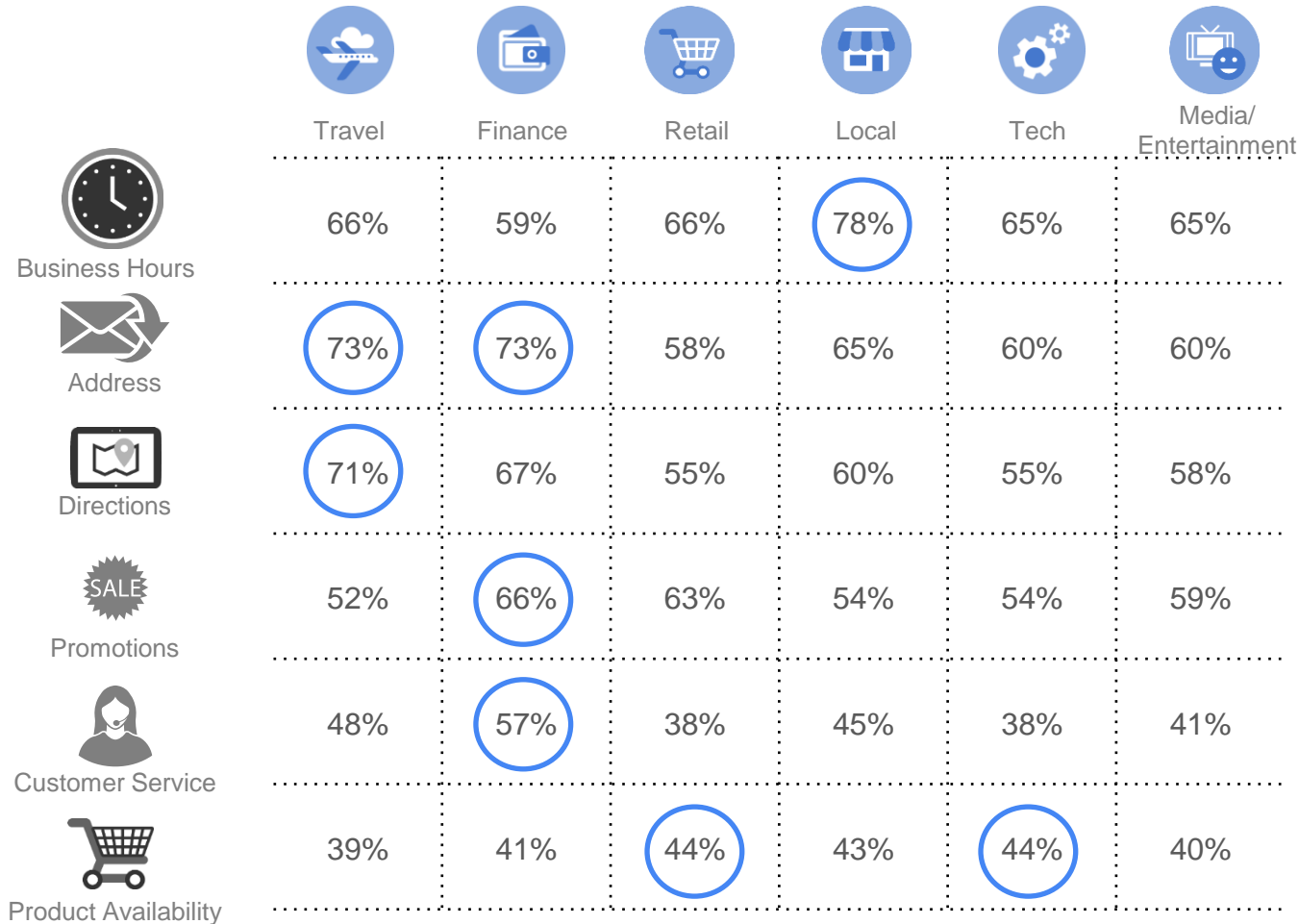
38%


43%





Specific verticals: address/directions most often searched for



 Top mention per category



What we learned

Local searches help consumers and result in short term actions

Advertiser implications

Information regarding address/ directions become key drivers for an purchase.



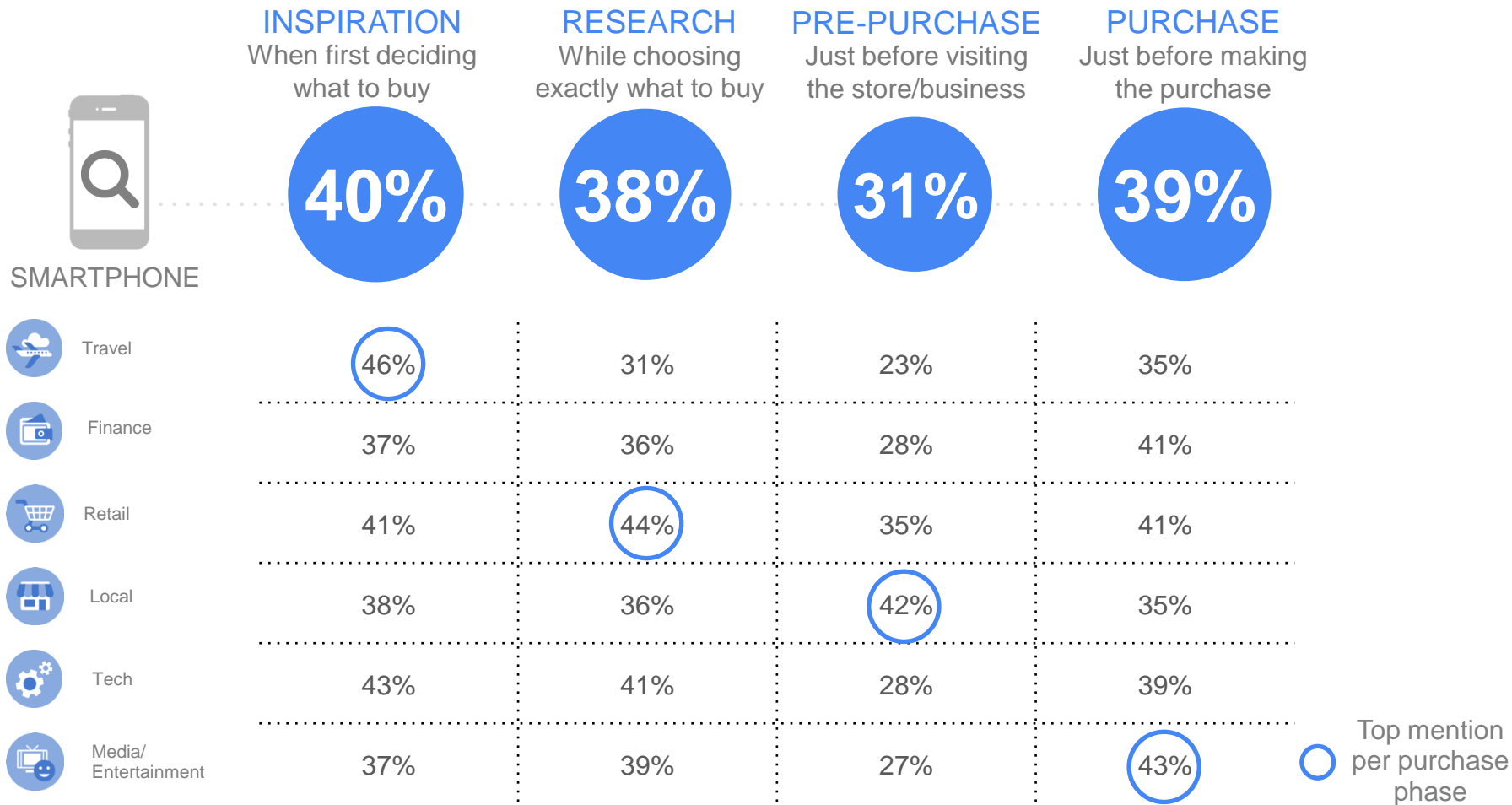
SITUATION AND INFLUENCE SEARCH

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

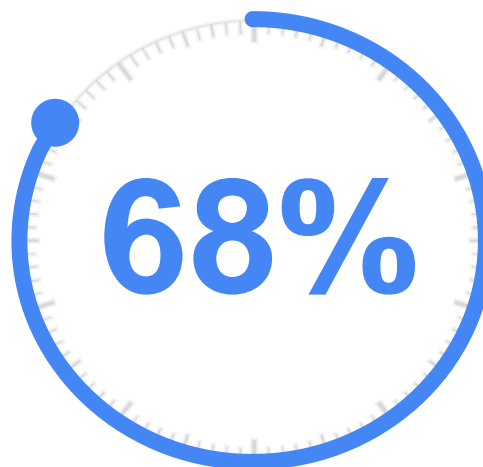
% of consumers who search for information at:




Consumers search for information during all steps of the purchase process

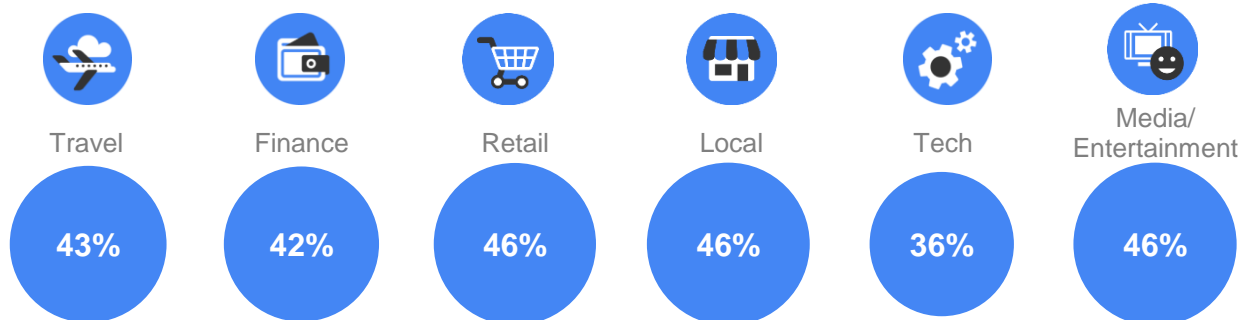


Search heavily supports consumers across all verticals and results in actions



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))

 **43%**
take a follow up
action within 1 hour
after search



What we learned

Searches result in short term actions

Advertiser implications

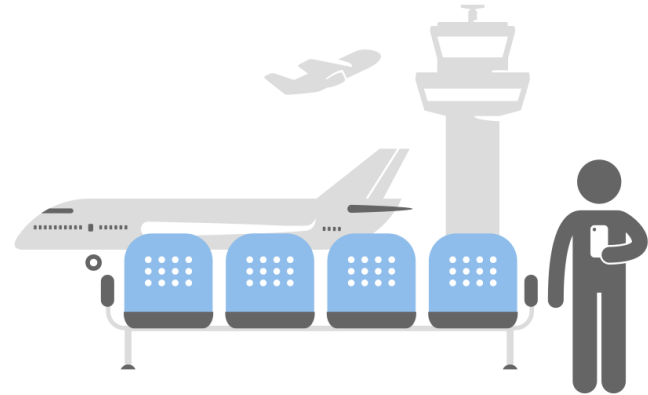
Consumers search mainly at home but act quickly after their search.

ENGAGING CONSUMERS WITH LOCATION-BASED ADS

Consumers want ads to be customized to their location

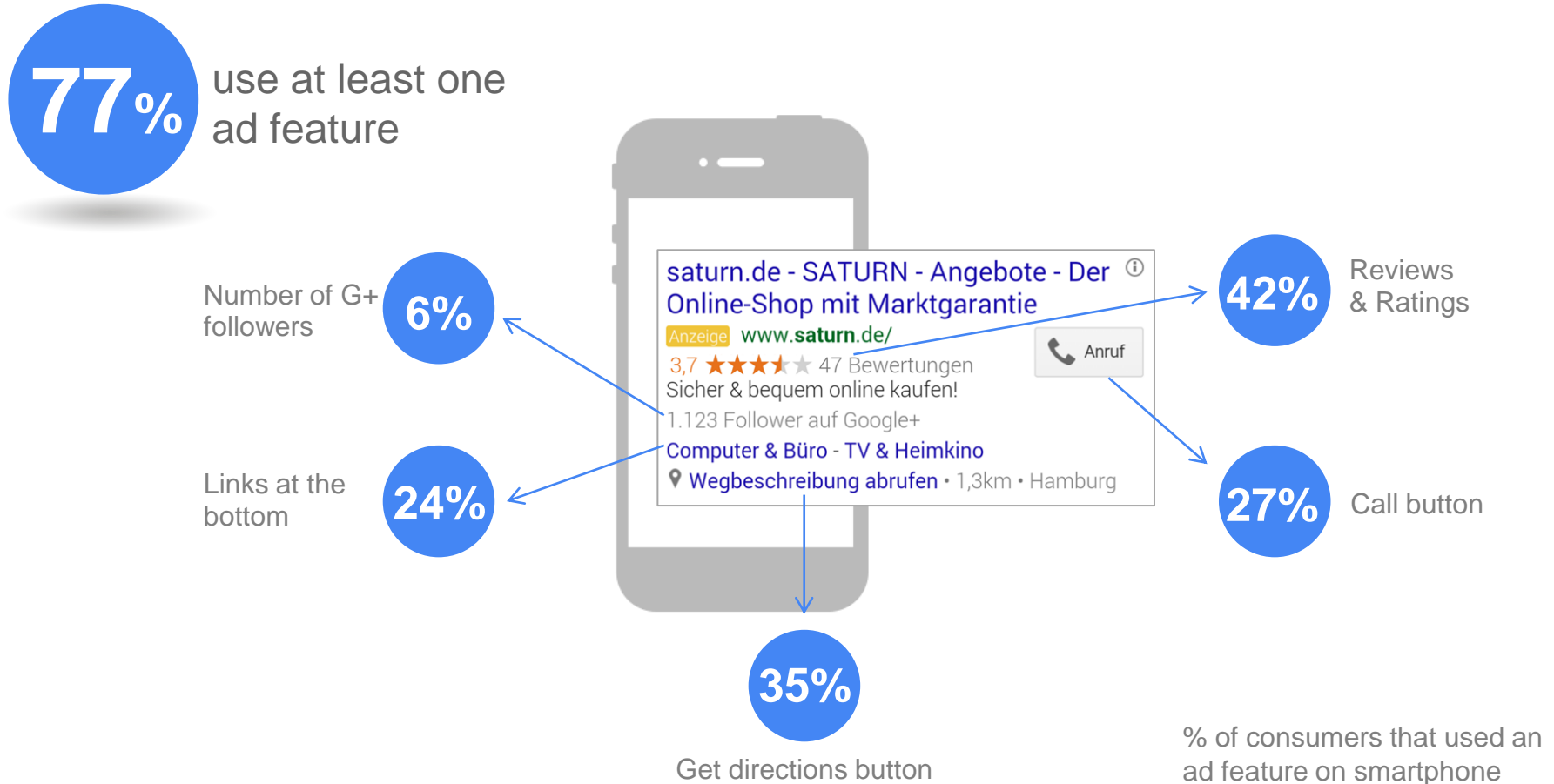


58% of Smartphone user
60% of Computer/Tablet user
want ads customized
to their *city/zip code*



56% of Smartphone user
59% of Computer/Tablet user
want ads customized to their
immediate surroundings

Consumers use ad features, on smartphone Seller reviews most used



8 in 10 use at least one ad feature on computer/tablet, Local Address is top

79%

use at least one
ad feature

Number of G+
followers

6%

Links at the
bottom

24%

saturn.de - SATURN - Angebote

Anzeige www.saturn.de/

3,7 ★★★★★ 47 Bewertungen

Der Online-Shop mit Marktgarantie. Sicher & bequem online kaufen!

150 Märkte in Deutschland · Heute bestellen & abholen · Dauerhaft tiefe Preise

1.123 Personen folgen Saturn Deutschland auf Google+

Computer & Büro - TV & Heimkino

📍 Mönckebergstraße 1, Hamburg - 040 309580

43%

Reviews
& Ratings

38%

Phone
Number

52%

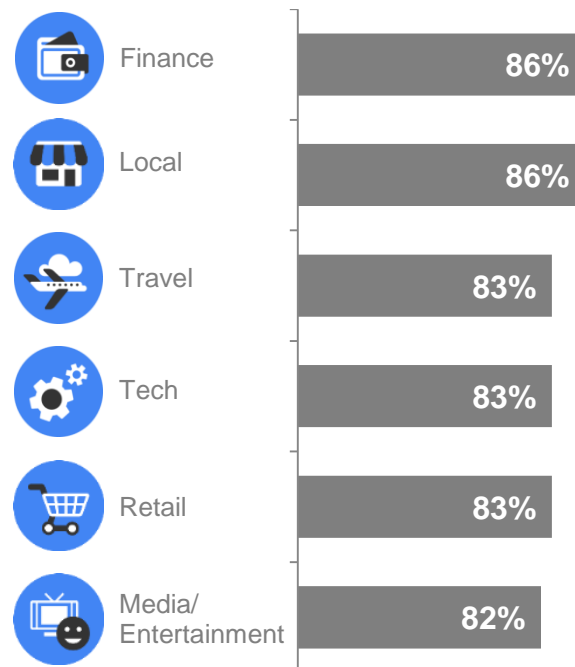
Local Address

% 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.

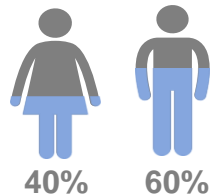
Advertiser implications

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

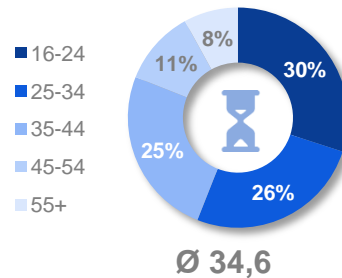
APENDIX 1: PROFILE OF SEARCH USER

Search user slightly more male, highly digital and keen to socialize and consume

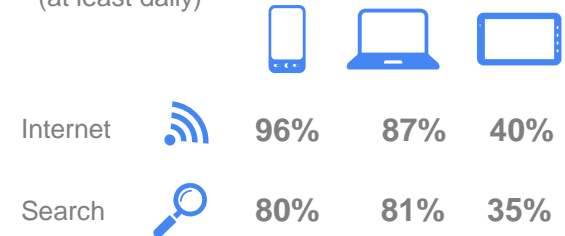
Gender



Age

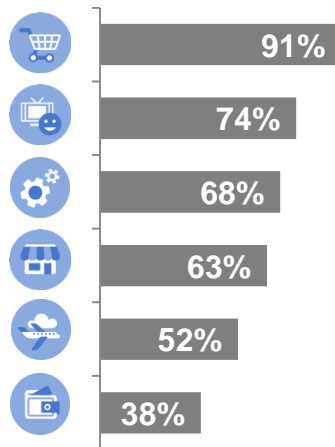


Internet and Search Usage (at least daily)



Purchase

(in the past 6 months)



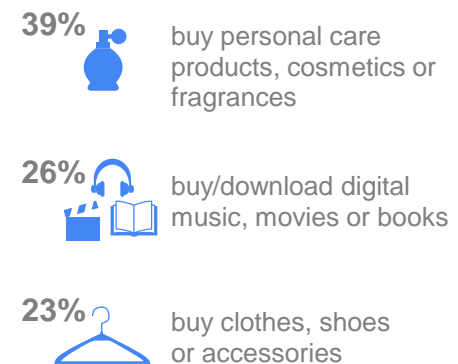
Leisure activities

(at least a few times a month)



Shopping behavior

(at least a few times a month)



Profiles of search user differ across verticals



Travel

1.6x more likely to be female than tech or finance user



1.3x more likely than retail user to dine out in restaurants



Finance

1.5x more likely than retail user to be male



3.1x more likely to buy electronics than travel user



Retail

1.5x more likely than tech user to buy clothes, shoes or accessories



1.9x more likely than tech/finance user to be female



Local

1.4x more likely to go out to bars/clubs than travel/retail/tech user



1.4x more likely than tech/media user to buy personal care products



Tech

2.5x more likely than retail user to be 55+ years



1.5x more likely than retail user to be male



Media/Entertainment

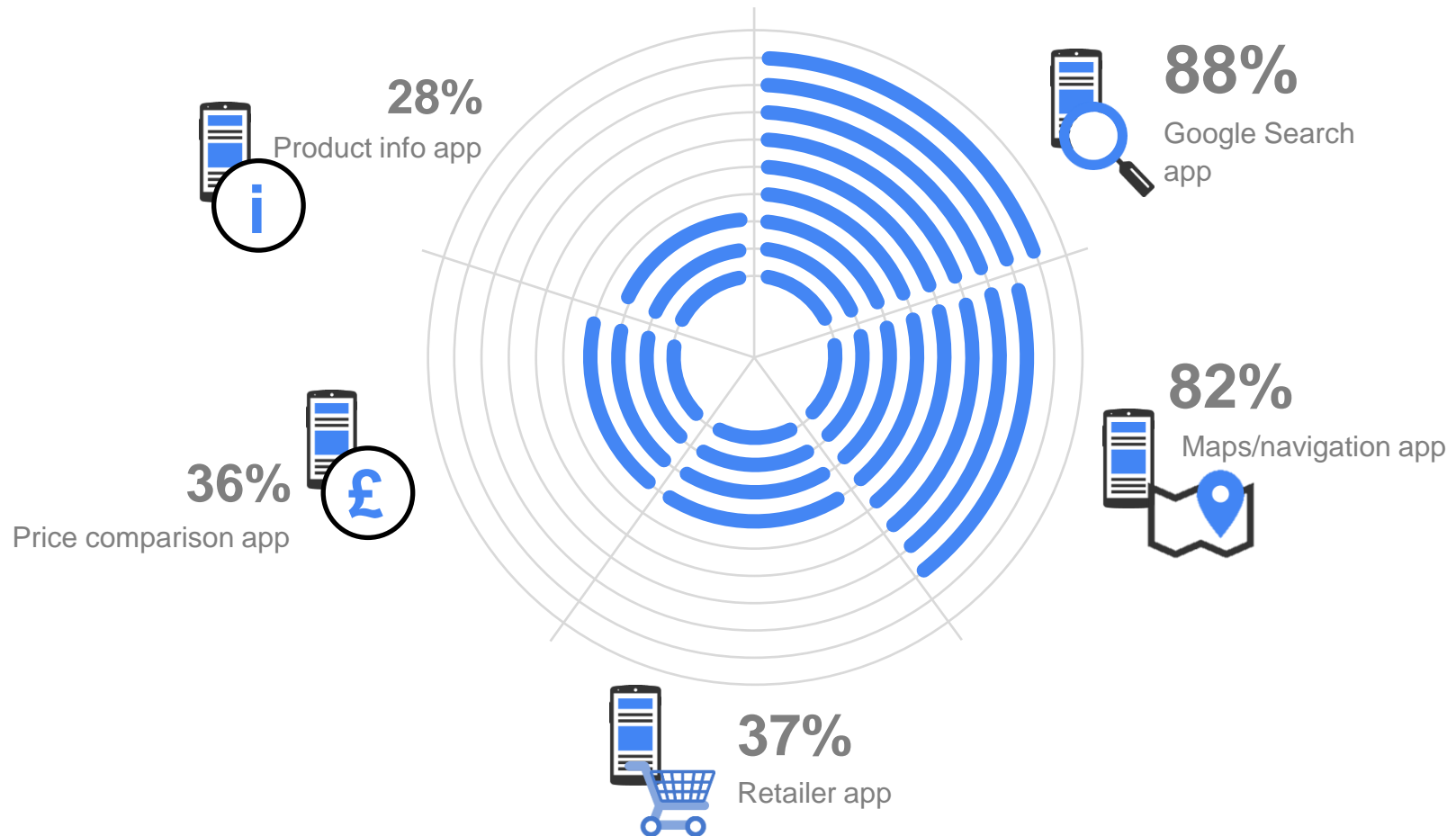
1.3x more likely than retail user to be male



1.2x more likely than retail user to dine out in restaurants



Google Search and Maps most used apps

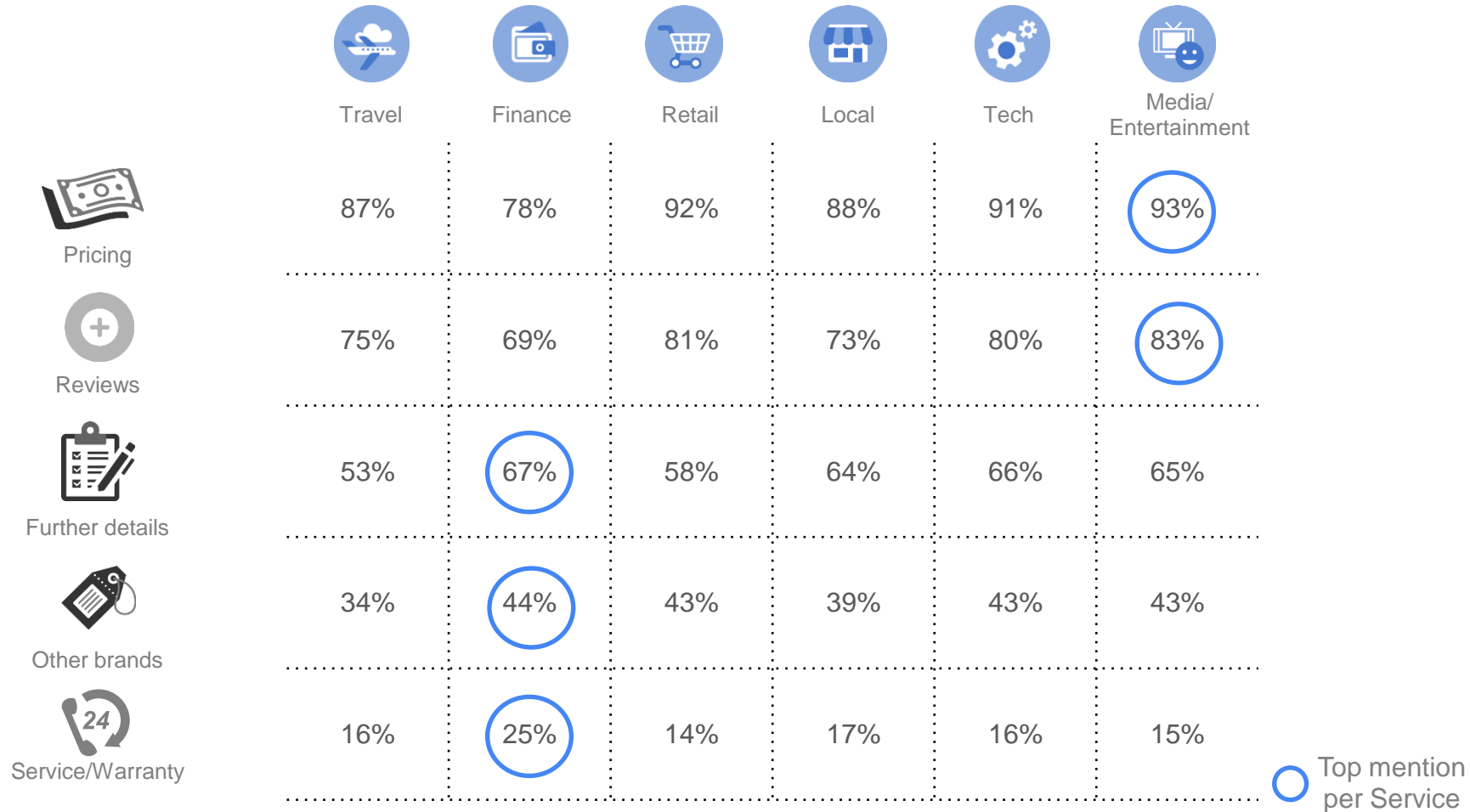




APENDIX 2: PRODUCT CATEGORY INSIGHTS

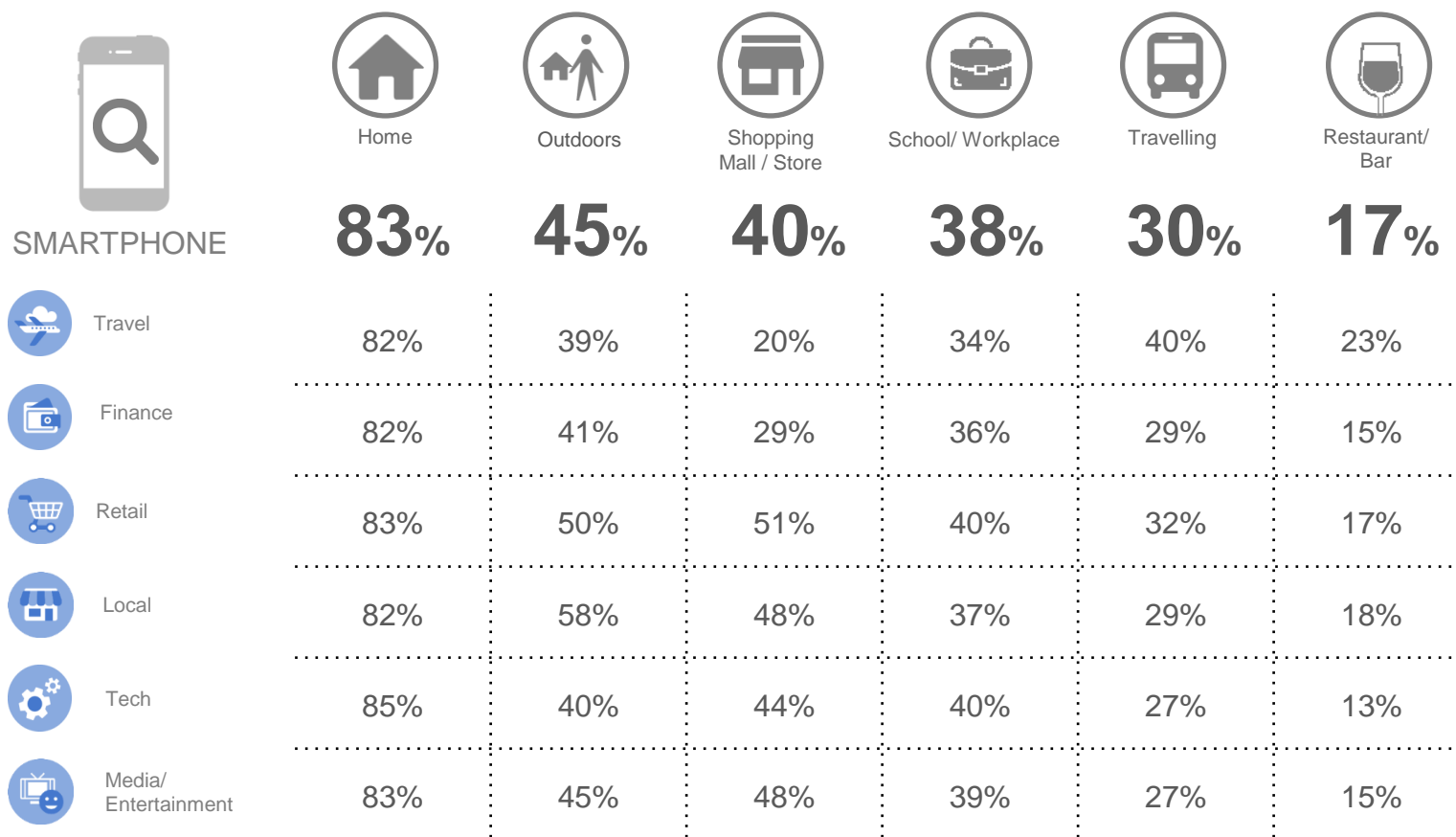


Prices are the most relevant information for consumers across the 6 verticals



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

% of consumers who search for information at:



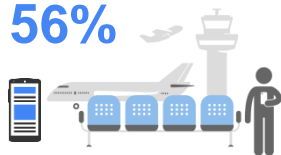
Customization is desired across verticals, but mostly for Finance and Local Services

58%



customized to
city/post code

56%



customized to
immediate surroundings



Travel



Finance



Retail



Local



Tech



Media/
Entertainment

56%

69%

64%

66%

63%

58%

56%

68%

61%

61%

57%

56%



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

THANK YOU!

CONTACTS:

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