

2015 Local Business Search Webinar

comScore & Neustar

December 2015



 **comSCORE.** **neustar** // Localize

comscore.com

Presenters



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Local Online Business Identities

- ▶ Neustar | Real-Time Information Services and Analytics
- ▶ Accurate, robust business identities for **search & mobile platforms**
- ▶ Distribution of business data to 100+ search platforms, directories, GPS services, mobile apps and more providing the **largest reach**.
- ▶ **Industry expertise** and guidance on data submission for optimization on local search platforms.



comScore 2 Million Person Global Panel

Comprehensive View of Digital Consumer Behavior



Today's Agenda

- **Study Overview**
- **Consumer Behavior**
- **Expectations & Influences**
- **Goals & Issues**
- **Executive Summary**
- **Contact Information**

Study Objectives & Background



Objectives: comScore, in conjunction with Neustar, sought to understand U.S. online consumers' local search behaviors and preferences, as well as how to improve local search.

Study Design: In order to address these objectives, the study design leveraged both a quantitative survey and behavioral data from comScore's U.S. consumer panel.

Sampling Design: Over 2,000 online local business searchers were surveyed via a custom survey instrument to obtain their attitudes and perceptions on local searches. These respondents were balanced through weighting to be similar to the U.S. online population as measured by comScore's syndicated products.

Behavioral Data: comScore provides additional analysis of total web search activity, including mobile and desktop insights from its syndicated products.

Sampling Methodology

Timing: Survey was fielded from March 23th – April 14th 2015

Sample Provider: comScore's proprietary online panel

Qualification: In order to qualify for the survey, a respondent must...

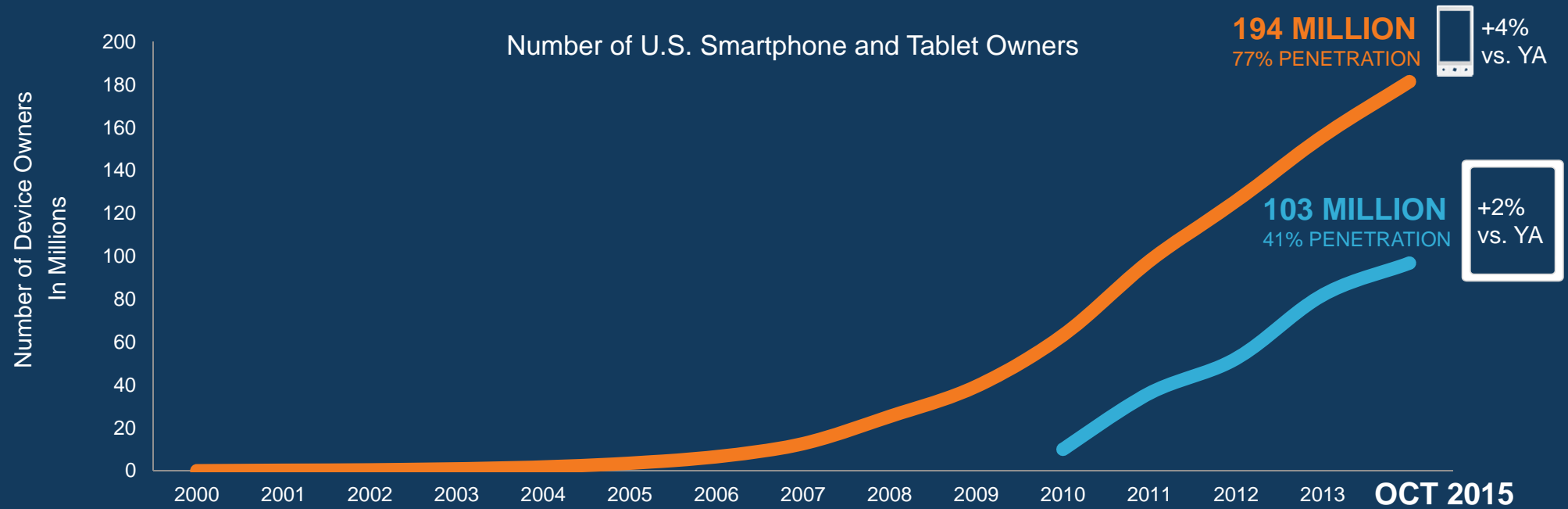
- Be living in the U.S.
- Be 18 years old or older
- Own or regularly use a PC/laptop, smartphone, or tablet device

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Tablet & Smartphone Ownership Growth

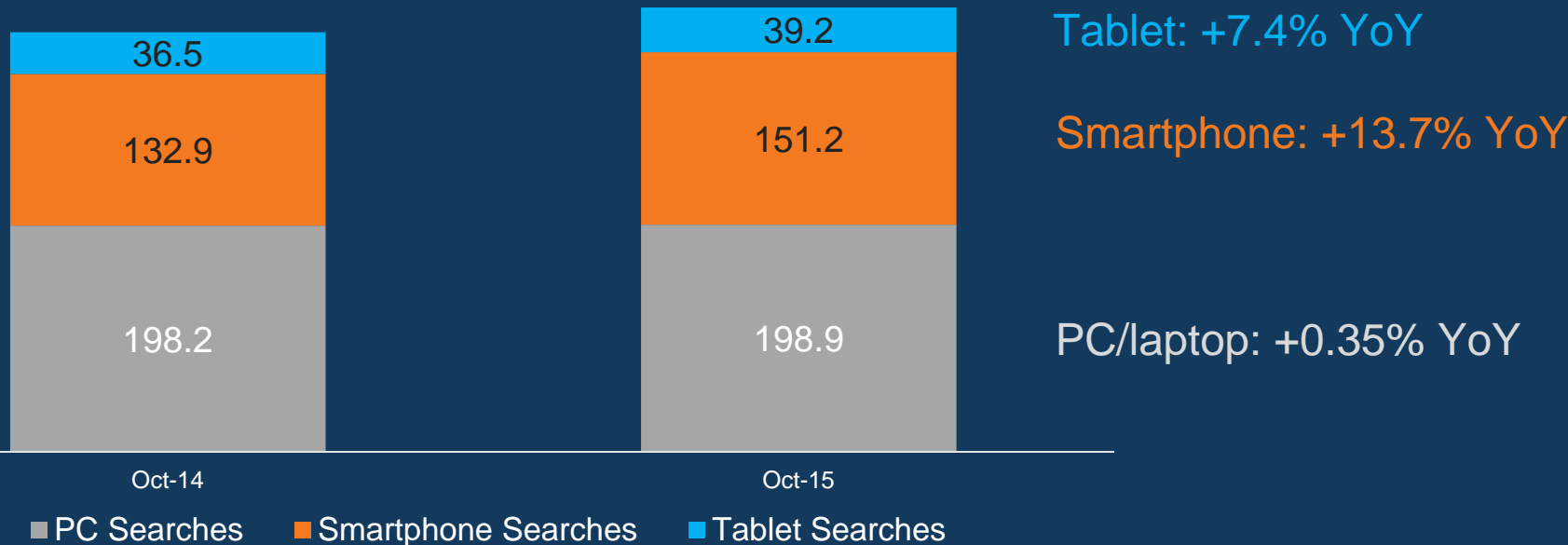
- While three in four Internet users now own a smartphone, tablet ownership has also risen to over 100 million devices in the U.S.



The Growth of Mobile Search in the U.S.

- Though overall visitation to search sites has grown on all three platforms, the number of visitors from mobile devices has grown at more than double the rate of PC in the past year.

Total PC/Laptop Visitors to Search/Navigation Sites (Millions)



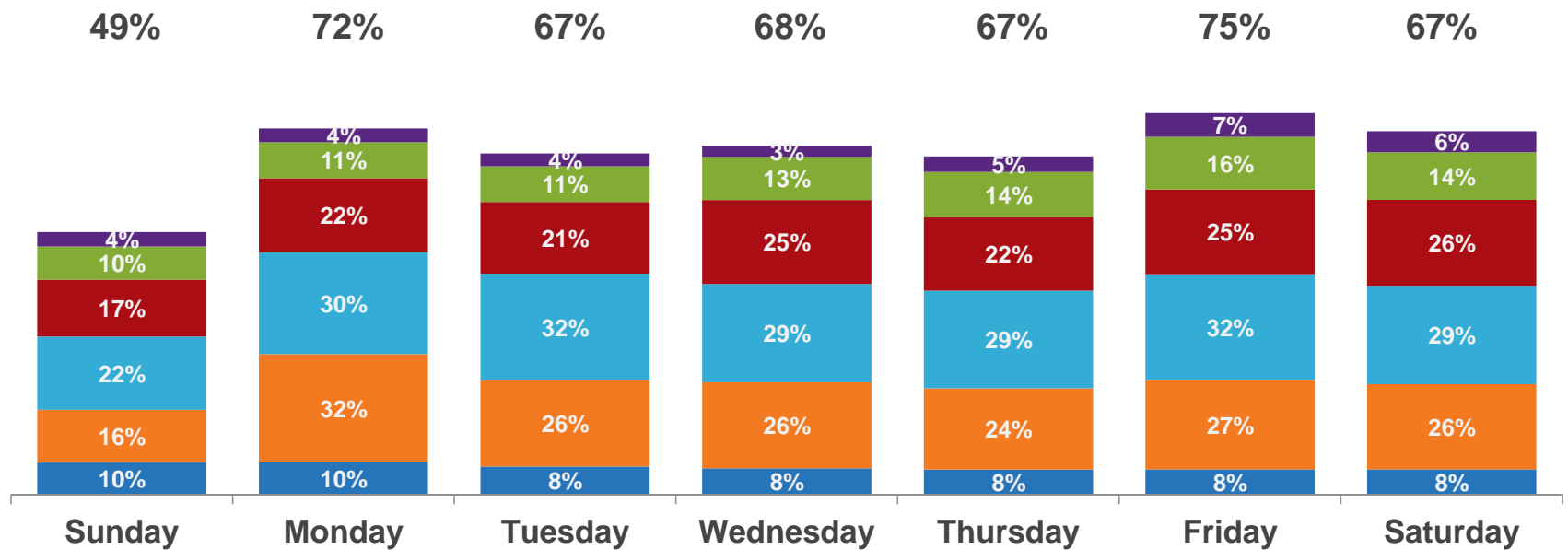
Times and Days of the Week Searched for Local Business Information Online

Times and Days of the Week Searched for Local Business Information Online

% Who Search On This Day:

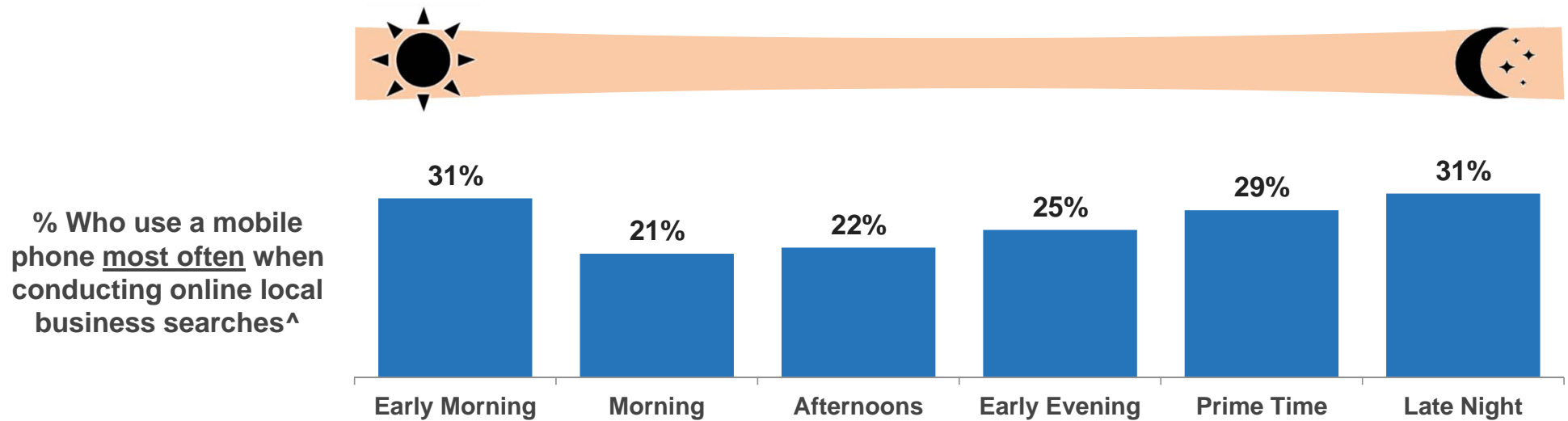


- Late Night
- Prime Time
- Early Evening
- Afternoons
- Morning
- Early Morning



Mobile Phone Usage for Local Search (In General) by Time of Day Searches Performed

Among those who search for local business, 31% search on a mobile phone most often early in the morning or late at night

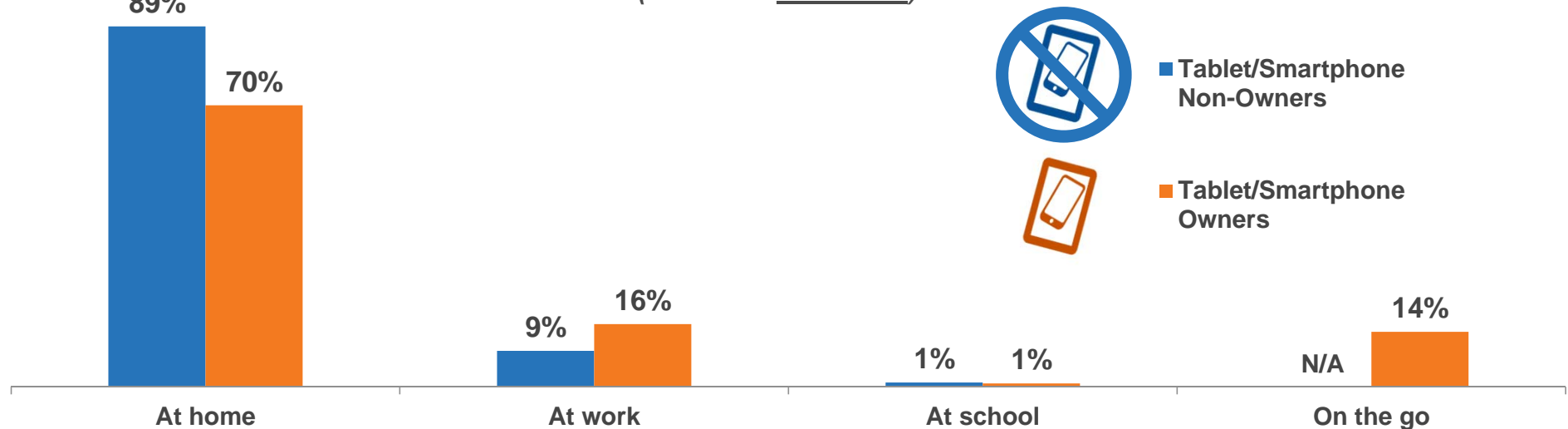


Where Most Often Searching for Local Business Information

Local searchers who owned a mobile device were more likely to be at work when searching for local businesses than on the go.

Those who owned a mobile device were significantly more likely to search while at work.

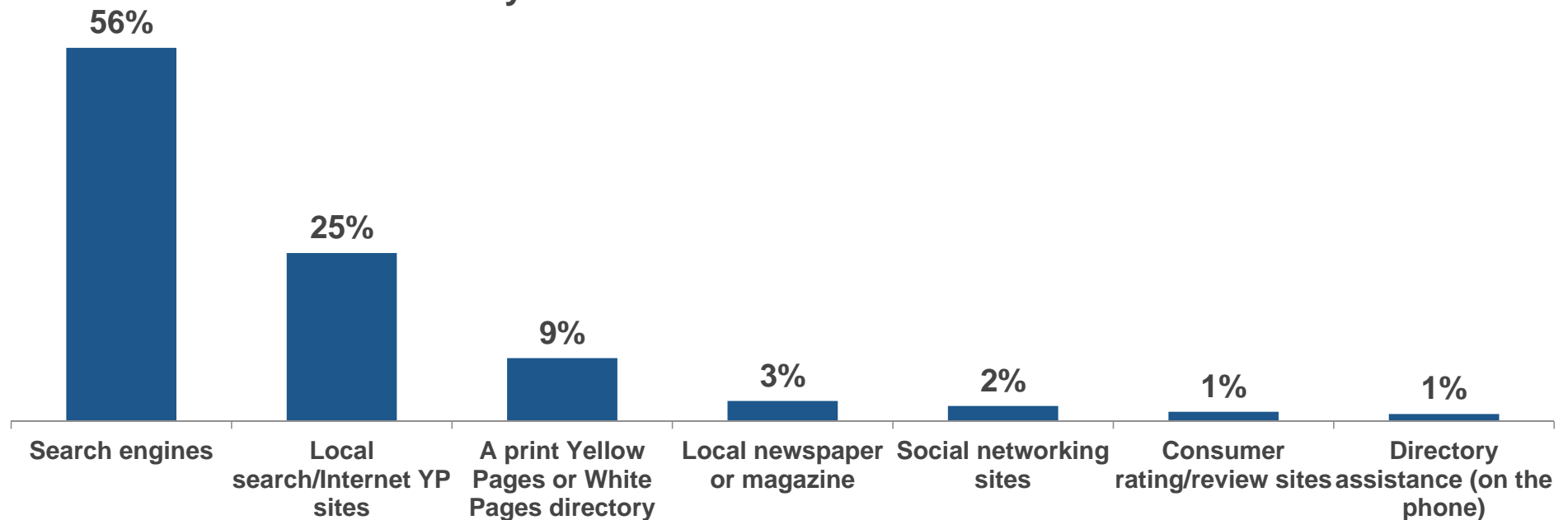
Where Consumers Are When Performing a Local Search
(Where Are *Most Often*)



Consumers' Primary Source for Local Business Information

Search engines are the most popular primary source of local business information, a finding echoed by previous research, with local search sites the second most used resource.

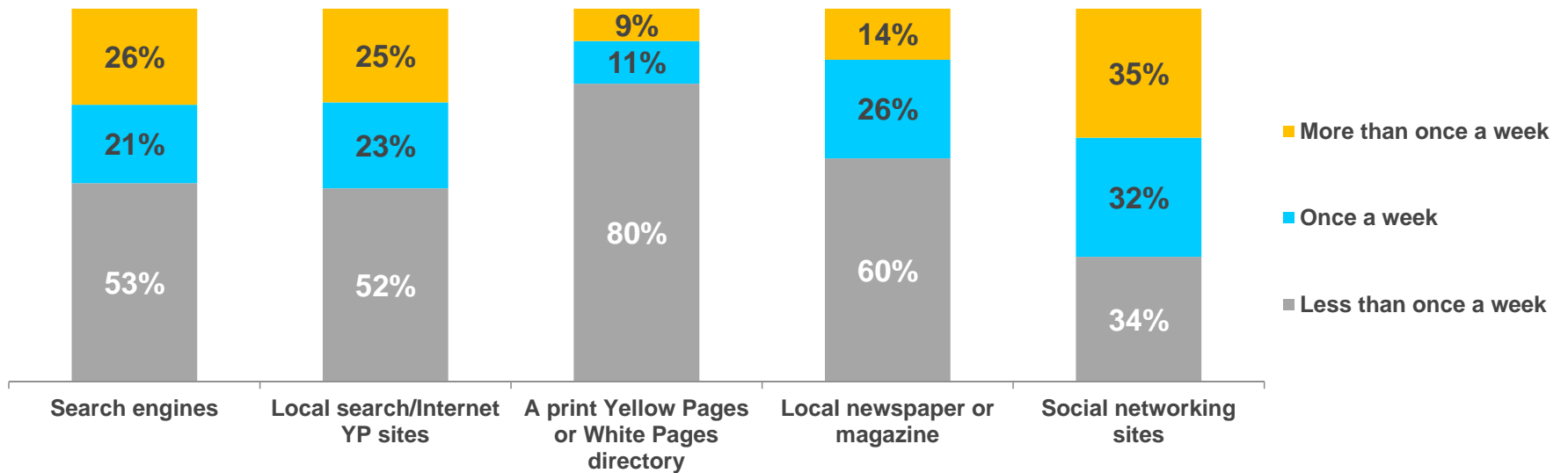
Primary Source for Local Business Information



Frequency of Accessing Primary Source of Local Business Information

Social Media, Local Search & IYP lead in frequency of Local Business Information Searches (67%-48%, respectively)

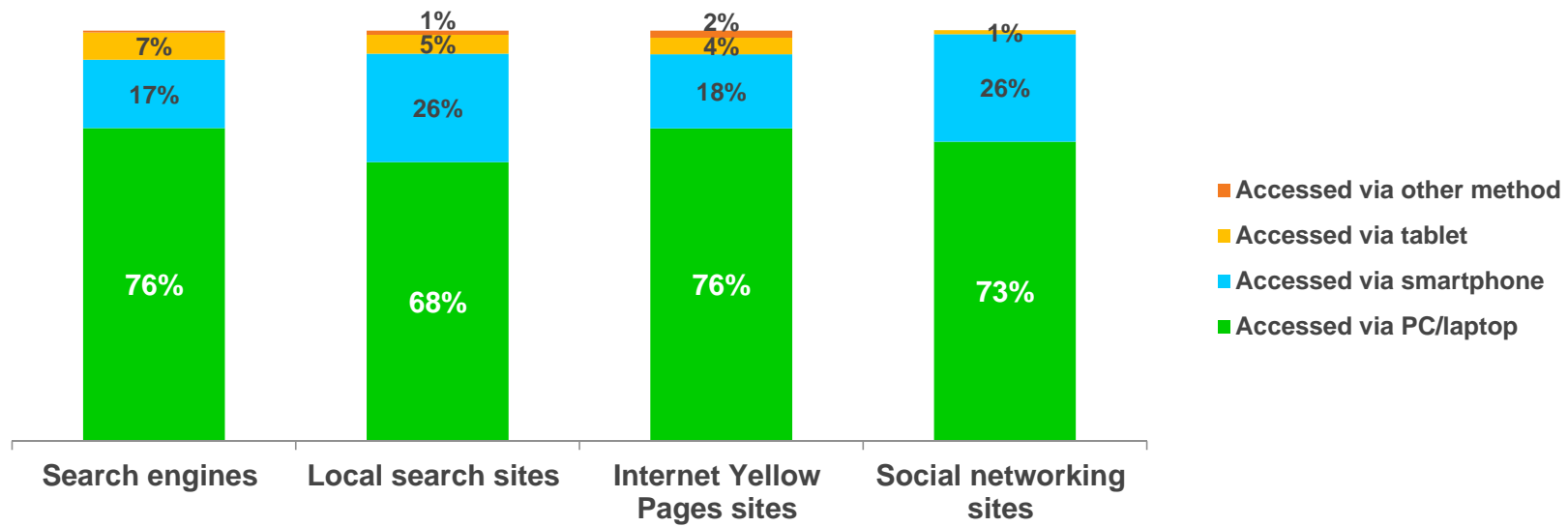
Frequency of Accessing Local Business Information



How Consumers Access Their Primary Source For Local Information

Smartphones were more heavily used for local search sites and social networking sites than for search engines and YP online, as far as a primary method of access.

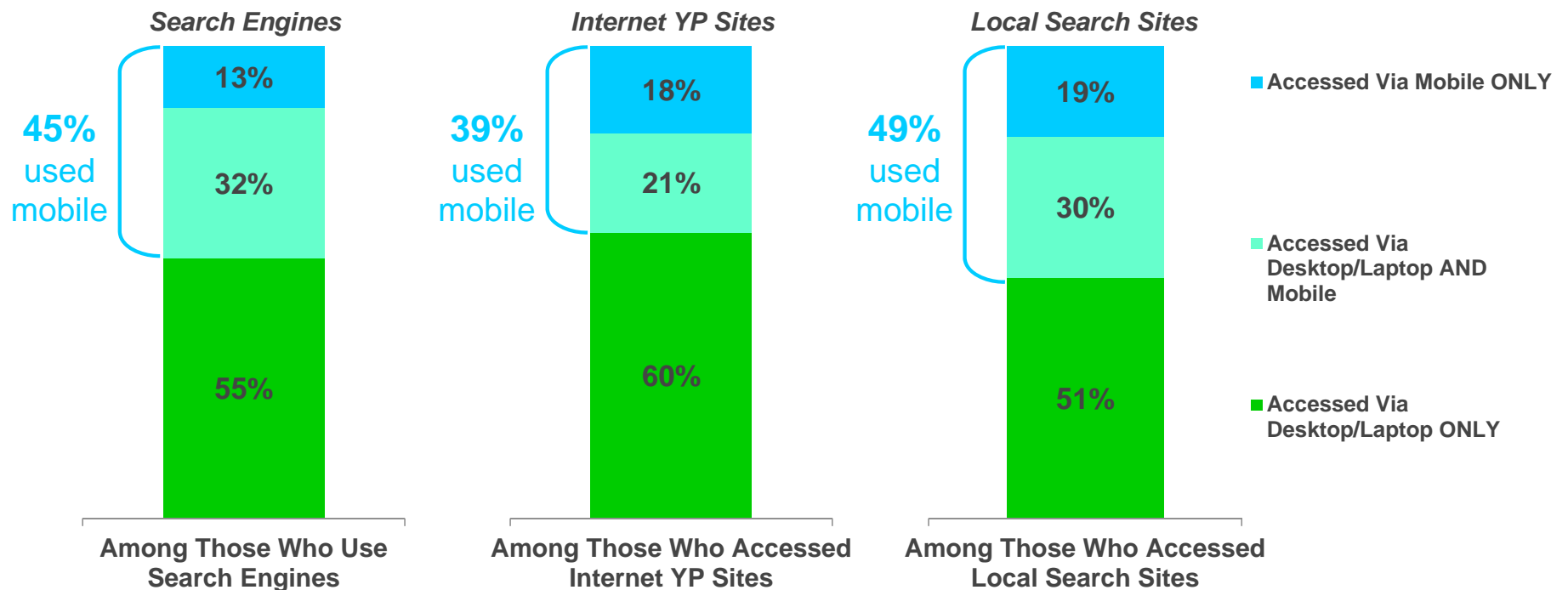
Primary Method of Accessing Local Business Information



Devices Used When Conducting Local Business Searches

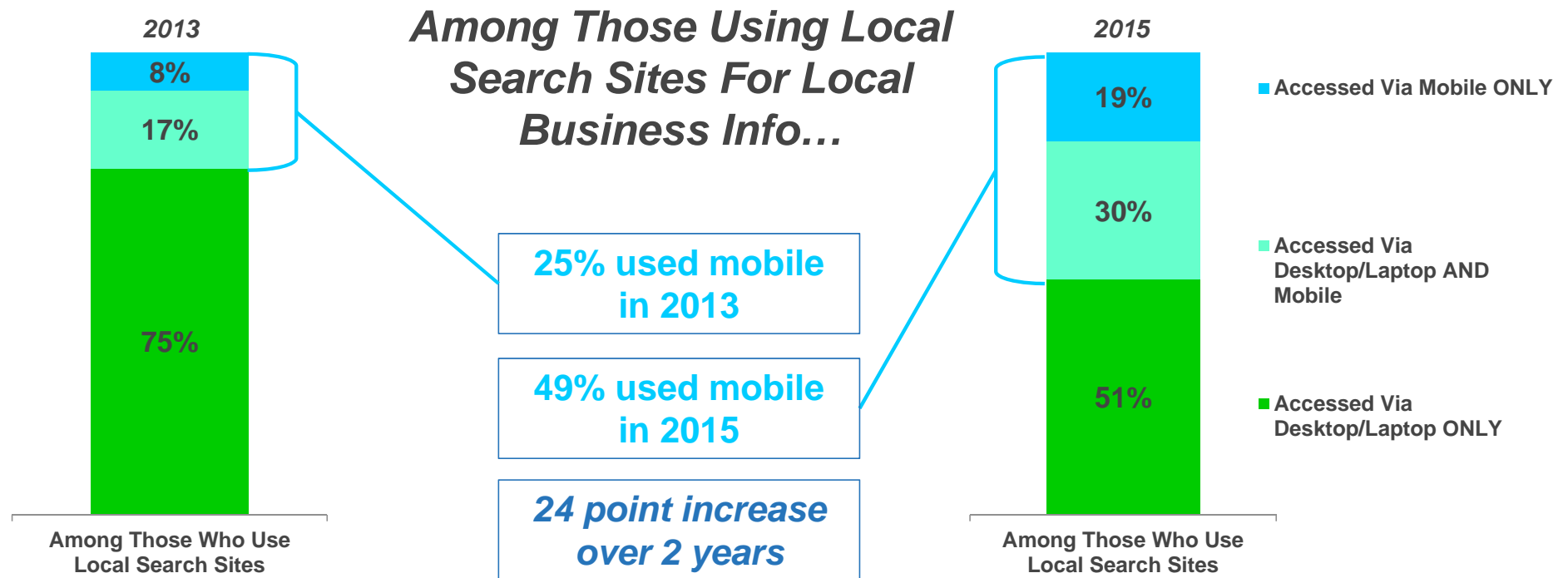
Almost half of local business searchers who used local search sites accessed them via mobile, with about two in ten (19%) solely using mobile for access

Among Internet YP site users, 39% have used a mobile device for accessing content during a local business search



Trended Results: Devices Used When Conducting Local Business Searches

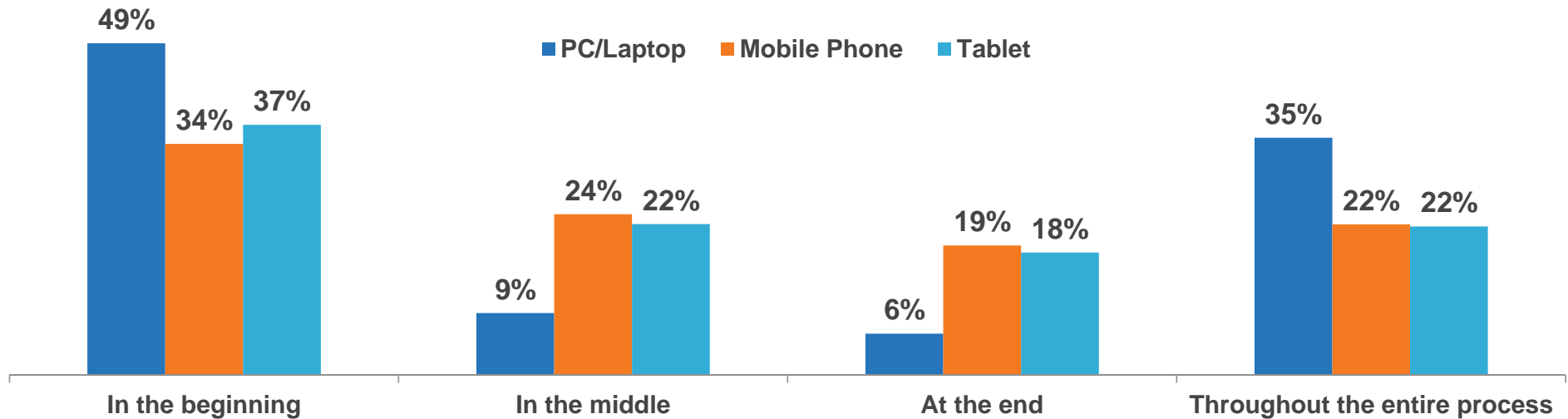
Almost half of local business searchers who used local search sites accessed them via mobile, with about one in five solely using mobile for access.



Stage of Local Business Search When Device is Used

PC/Laptops are primarily used in the beginning stages of a local business search. By comparison, mobile phones and tablets are more likely to be used in the middle or at the end of the process.

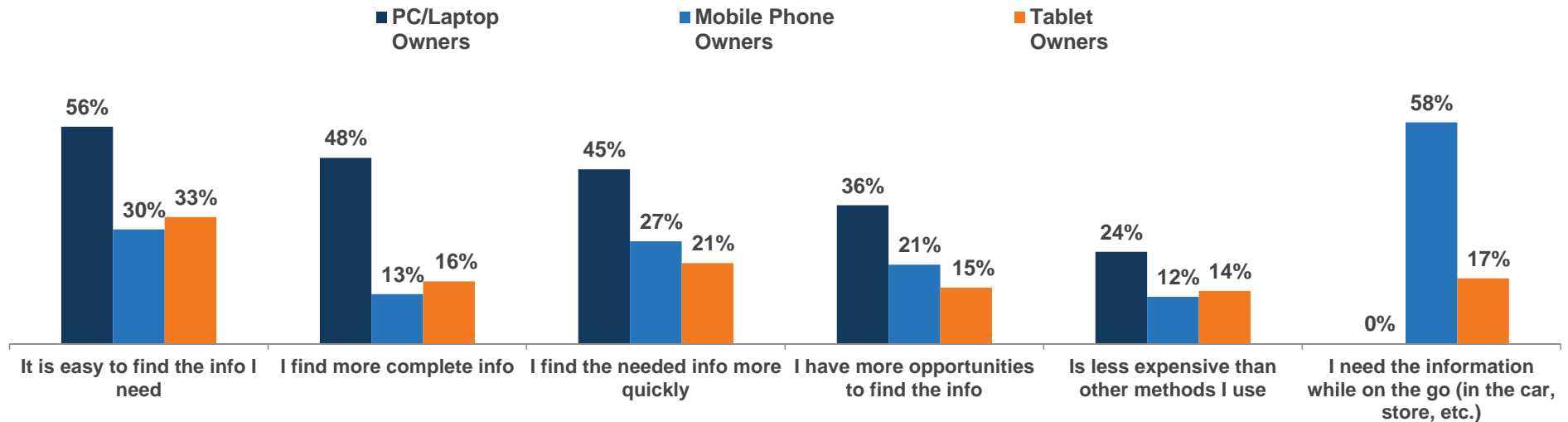
Stage of Local Business Search When Device is Used



Reasons for Choosing Device for Local Business Searches

PC/Laptops are easier to use and provide local business searchers with quick and complete info. Mobile phones, however, are the most well-suited to delivering information to users on the go.

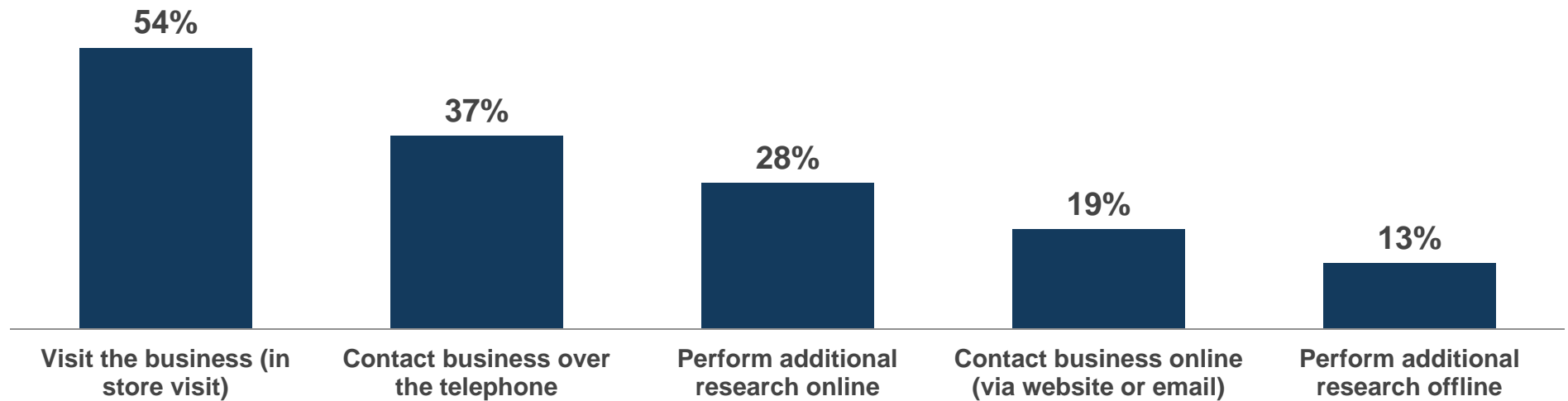
Reasons for Choosing Device for Local Business Searches



Activities Resulting from Online Local Business Search

Over half of online local searchers visited a business at their store after conducting an online search

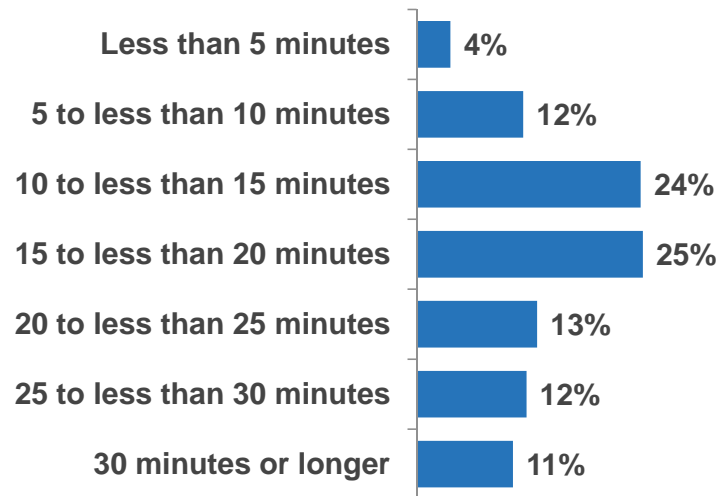
Activities Resulting from Online Local Business Search



Willingness and Likelihood to Find/Visit A Specific Brand Store

About half of local online searchers were willing to travel up to 15 minutes to find a specific brand or company. About half stated they would be very likely to visit a store if it were closer to them.

Willingness to Travel to Find A Specific Brand or Company



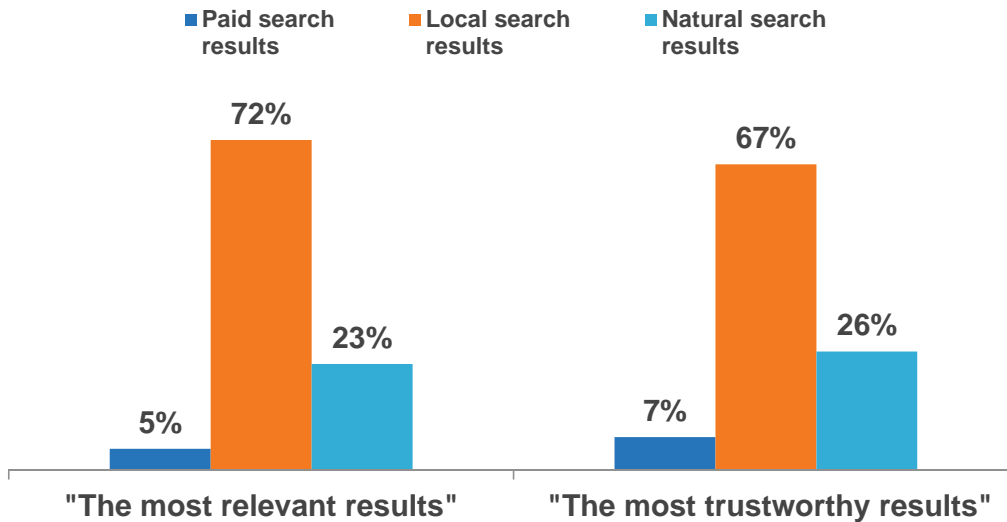
59% are willing to travel 15 minutes to find what they are searching for

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Opinions on Relevance and Trustworthiness of Search Results

Perception of Relevance and Trustworthiness of Search Results



Local Search Results
 Andiamo! Brick Oven Pizza
 4.3 ★★★★★ 87 reviews · \$\$ · Pizza
 Biscayne Blvd · Inventive pies in an iconic building
 Best Outdoor Dining in Miami

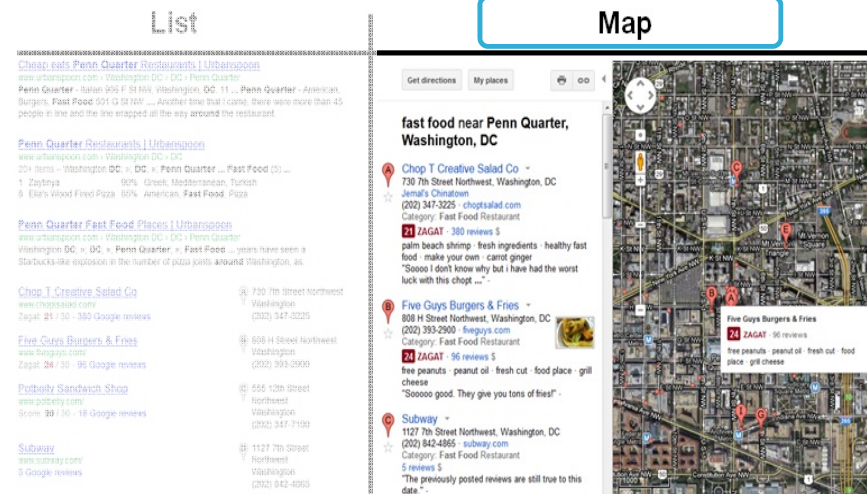
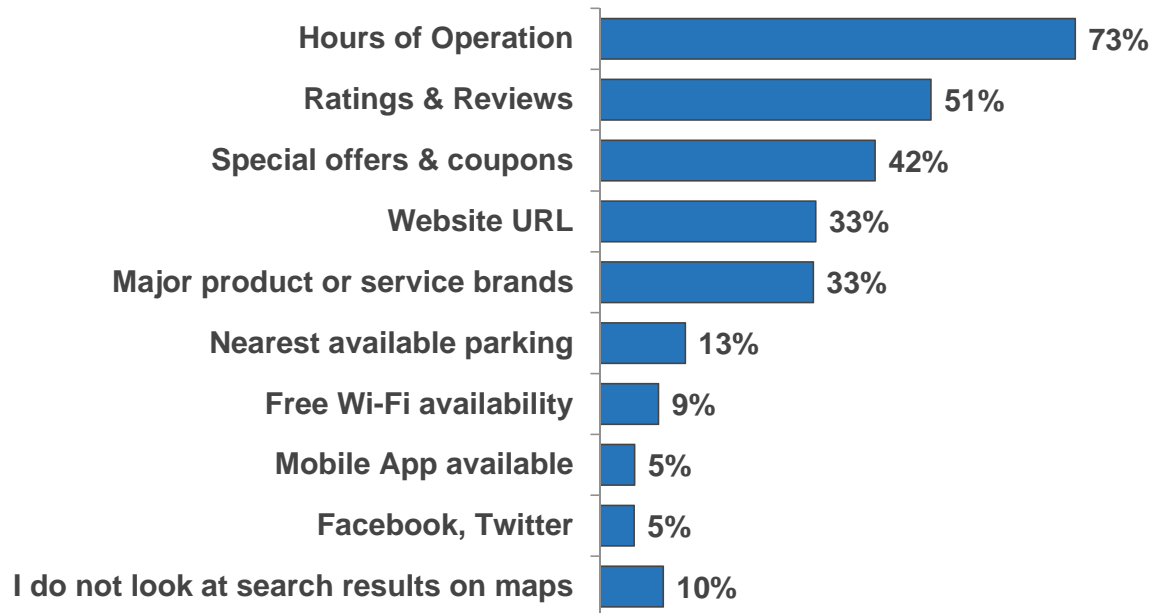
Paid Search Results
 Domino's® 50% Off Pizza
 www.dominos.com/ ·
 This Week Only. 50% Off All Pizzas
 At Menu Price When You Order Online

Natural Search Results
 Search Engine Optimized
 Miami's Ten Best Pizzas | Miami New Times
 www.miaminewtimes.com/.../miamis-ten-best-pizzas-6... · Miami New Times ·
 Sep 26, 2013 · There are two kinds of pizza lovers in this town: traditionalists and
 radicals. Traditionalists want extra cheese, but never fontina or Gorgonzola.

Most Important Pieces of Info On A Map

Hours of operation were the most important elements of a map, followed by ratings and reviews.

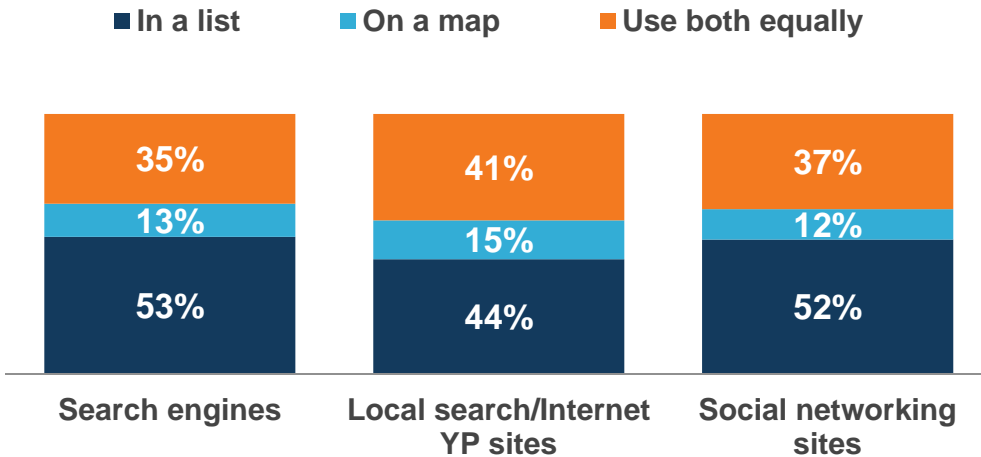
The Most Important Pieces of Info On A Map



Usage of Maps Versus Lists in Local Search Results

Maps are heavily relied upon during local business searches, but infrequently used alone. Lists are more frequently used on search engines and social networking sites.

How Local Search Results Are Generally Viewed



List

Map

Cheap eats Penn Quarter Restaurants | Urbanspoon
www.urbanspoon.com | Washington DC | DC - Penn Quarter
Penn Quarter - Italian 906 F St NW, Washington, DC 11 ... Penn Quarter - American, Burgers, Fast Food 501 G St NW ... Another time that I came, there were more than 45 people in line and the line wrapped all the way around the restaurant.

Penn Quarter Restaurants | Urbanspoon
www.urbanspoon.com | Washington DC | DC - Penn Quarter
20+ items - Washington DC - DC - Penn Quarter ... Fast Food (5) ...
1 Zaytina 90% Greek, Mediterranean, Turkish
8 Elta's Wood Fired Pizza 85% American, Fast Food, Pizza

Penn Quarter Fast Food Places | Urbanspoon
www.urbanspoon.com | Washington DC | DC - Penn Quarter
Washington DC - DC - Penn Quarter, > Fast Food ... years have seen a Starbucks-like explosion in the number of pizza joints around Washington, as

Chop T Creative Salad Co
www.choptsalad.com
Zagat: 21 / 30 - 380 Google reviews

Five Guys Burgers & Fries
www.fiveguys.com
Zagat: 24 / 30 - 96 Google reviews

Potbelly Sandwich Shop
www.potbelly.com
Score: 20 / 30 - 18 Google reviews

Subway
www.subway.com/
5 Google reviews

fast food near Penn Quarter, Washington, DC

Chop T Creative Salad Co -
730 7th Street Northwest, Washington, DC
Jemal's Chinatown
(202) 347-3225 - choptsalad.com
Category: Fast Food Restaurant
ZAGAT - 380 reviews 5

palm beach shrimp - fresh ingredients - healthy fast food - make your own - carrot ginger
"Soooo I don't know why but I have had the worst luck with this chopT ..."

Five Guys Burgers & Fries -
808 H Street Northwest, Washington, DC
(202) 393-2900 - fiveguys.com
Category: Fast Food Restaurant
ZAGAT - 56 reviews 5

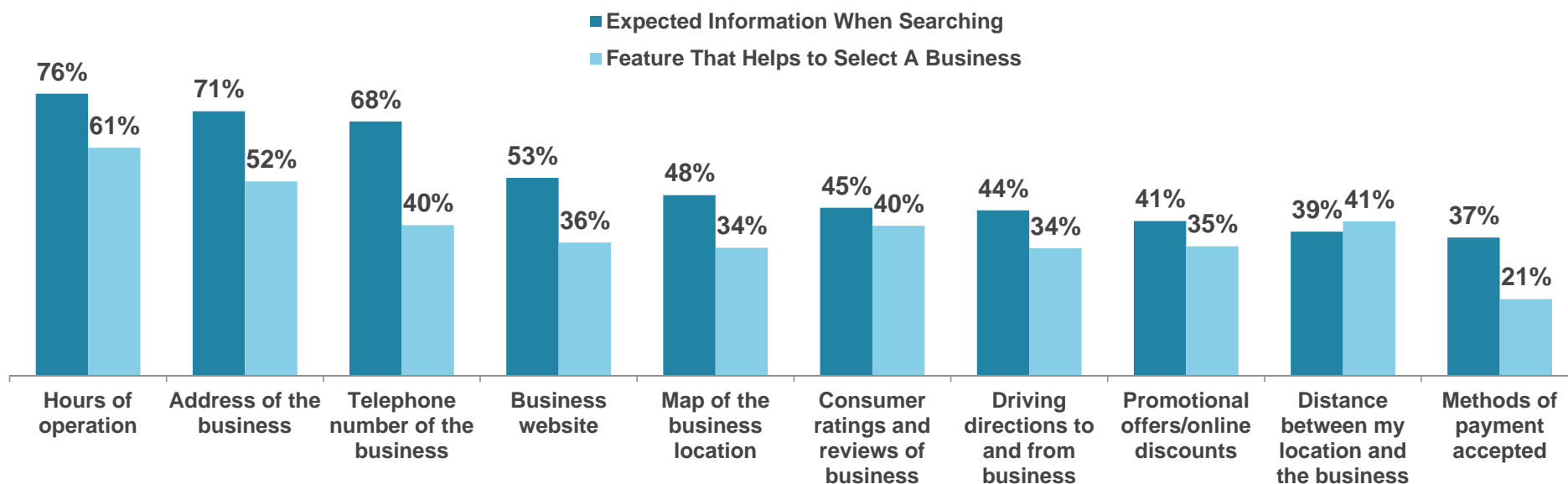
free peanuts - peanut oil - fresh cut - food place - grill cheese
"Sooooo good. They give you tons of fries!" -

Subway -
1127 7th Street Northwest, Washington, DC
(202) 842-4865 - subway.com
Category: Fast Food Restaurant
5 reviews 5
"The previously posted reviews are still true to this date."

What Information Is Expected & Which Influence Selection

Local searchers expect hours of operation to be the most commonly provided element of info during their local search. Hours of operation are noted as the most helpful feature in selecting a business during a local search.

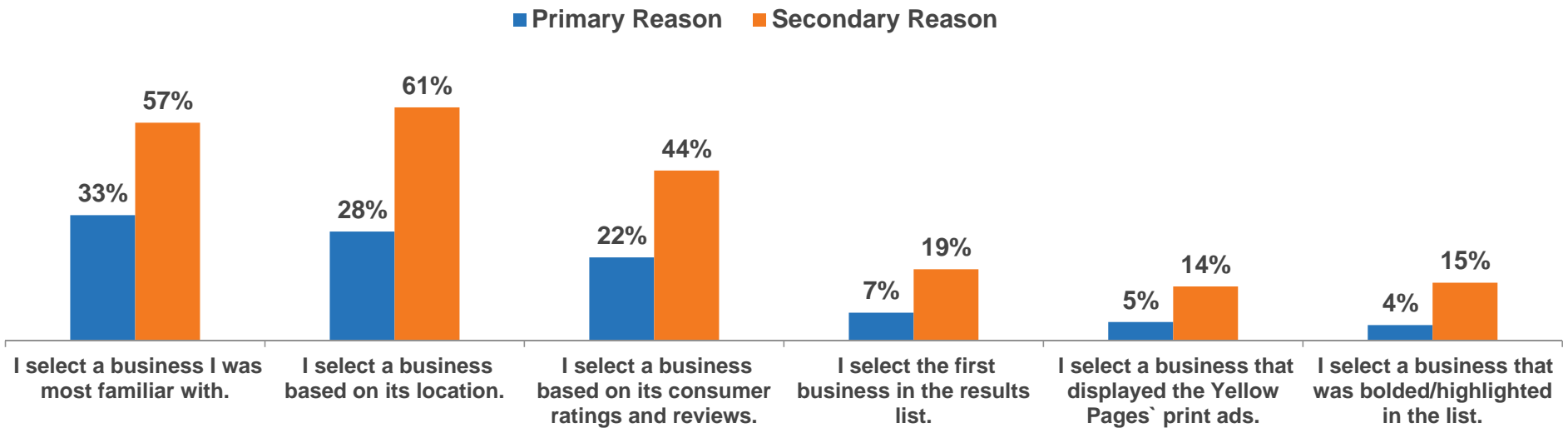
Types of Information & Their Usefulness



Reasons For Selection When Searching for Local Business

The most common primary reason for selecting a business was familiarity with that business.
The most common secondary reason for selecting a business was its location.

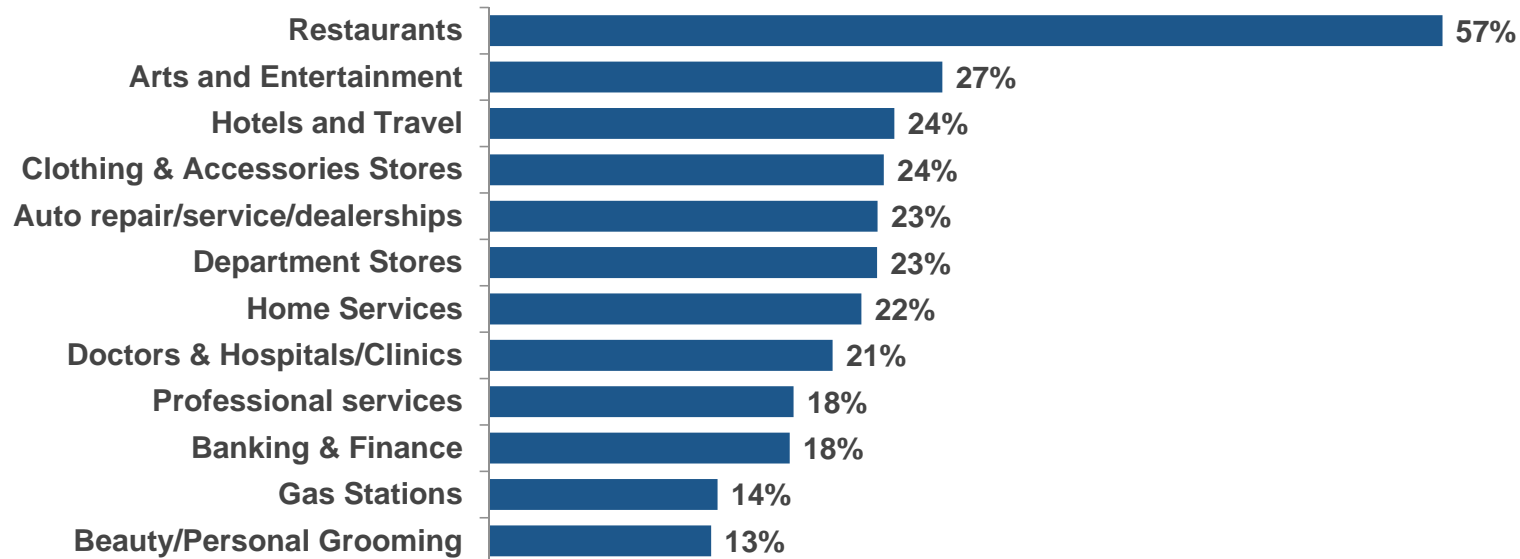
Reasons For Selecting A Business When Searching for Local Businesses



Types of Local Businesses Searched

Restaurants are the most common local search category, with more than half of respondents stating they commonly conduct local business searches for restaurants.

Type of Businesses Commonly Searched For



Searchers by What They Search– Behaviors and Tendencies

- **Among local searchers who most commonly search for doctors or clinics:**
 - Over three in five (61%) are seeking to find a phone #.
 - Almost a third (32%) simply go with the first result in the list.
- **Among those who most commonly search for restaurants:**
 - Over two thirds (70%) select it based on location.
 - Almost three in four (72%) use hours of operation to select a business
- **Half of those most commonly searching for hotels or travel select the business based on consumer reviews/ratings.**

Searchers by What They Search– Behaviors and Tendencies

- **Among local searchers most commonly searching for restaurants:**
 - Four out of five say hours of operation is one of the top three most important pieces of information on a map.
- **Among those who most commonly search for hotels or travel:**
 - Nearly half (47%) say special offers and coupons are one of the top three most important pieces of information on a map.

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Primary & Secondary Goals When Conducting Local Search

Local online searchers' goals are most often to obtain an address, find hours of operation, or get a phone number.

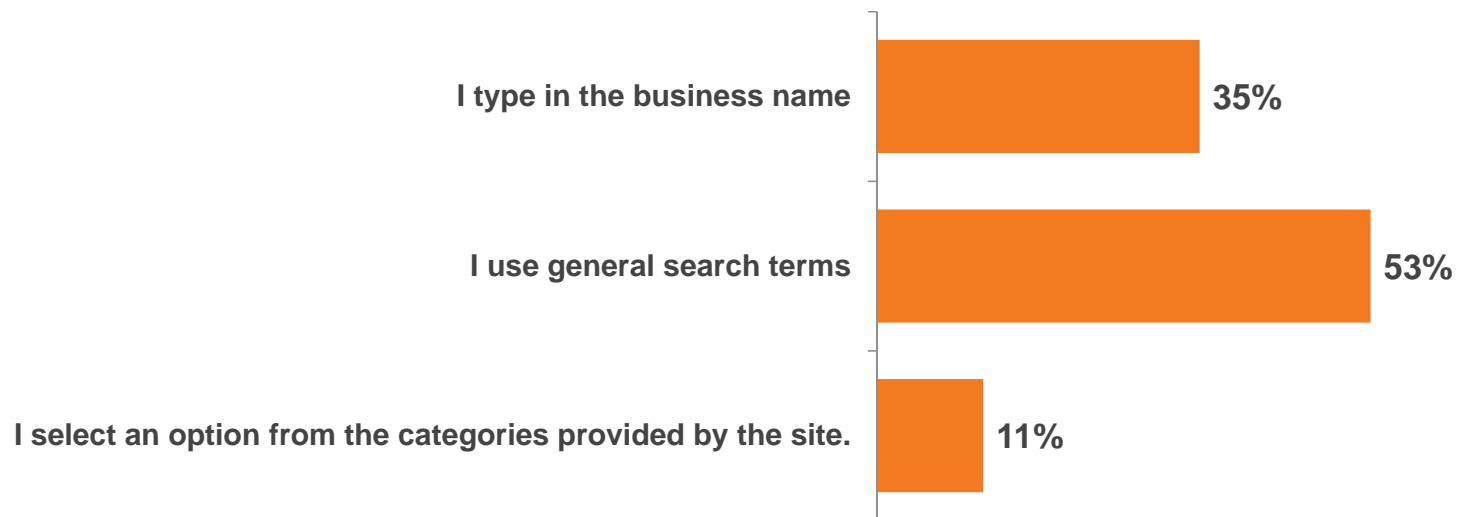
Primary Goals During Local Search



Search Methods

Just over half of local searchers typically use general search terms in their search.
When their search doesn't provide them the results they need, more than half try different keywords

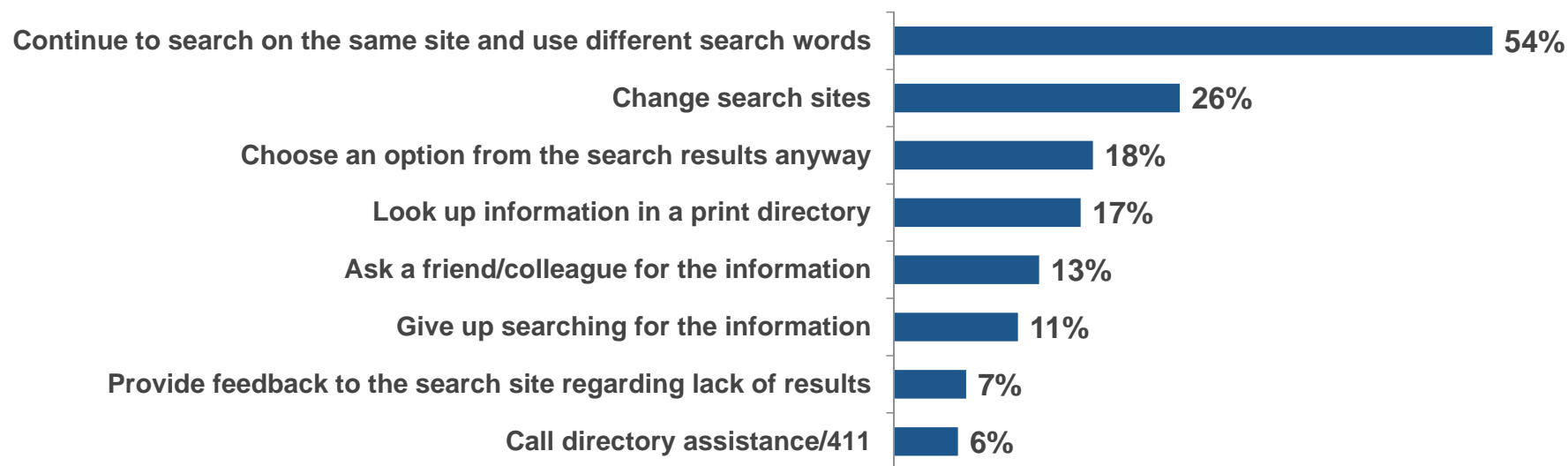
How Search for Local Business Information



Search Methods and Actions Taken When No Results Provided

Just over half of local searchers typically use general search terms in their search.
When their search doesn't provide them the results they need, more than half try different keywords

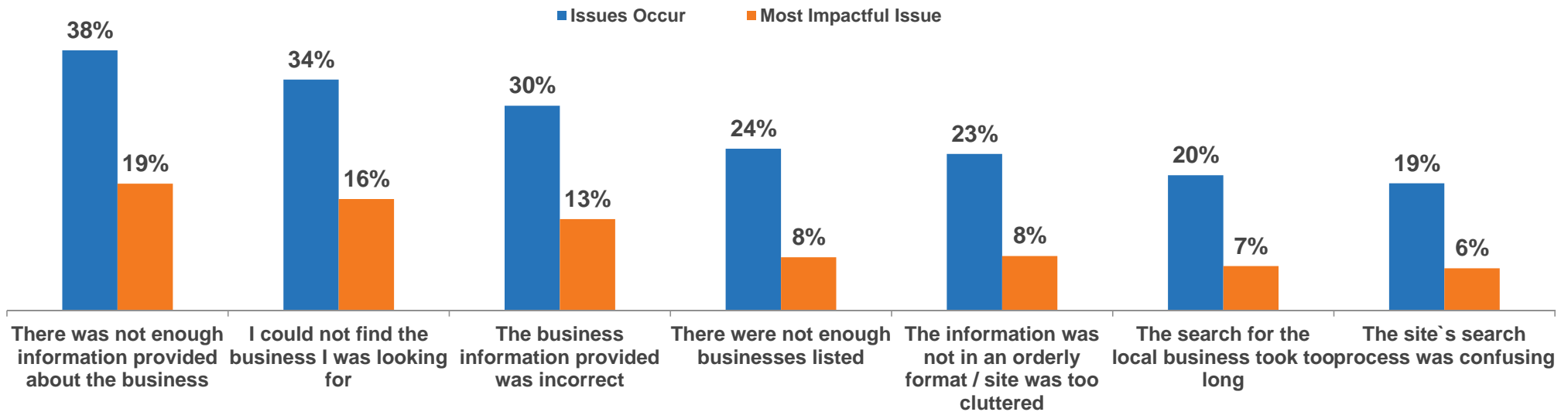
Actions Taken When Search Doesn't Provide Results Needed



Issues Encountered During Local Search

The most common issue encountered was not having enough information from the business, and one in five reported that it was the most impactful issue to them.

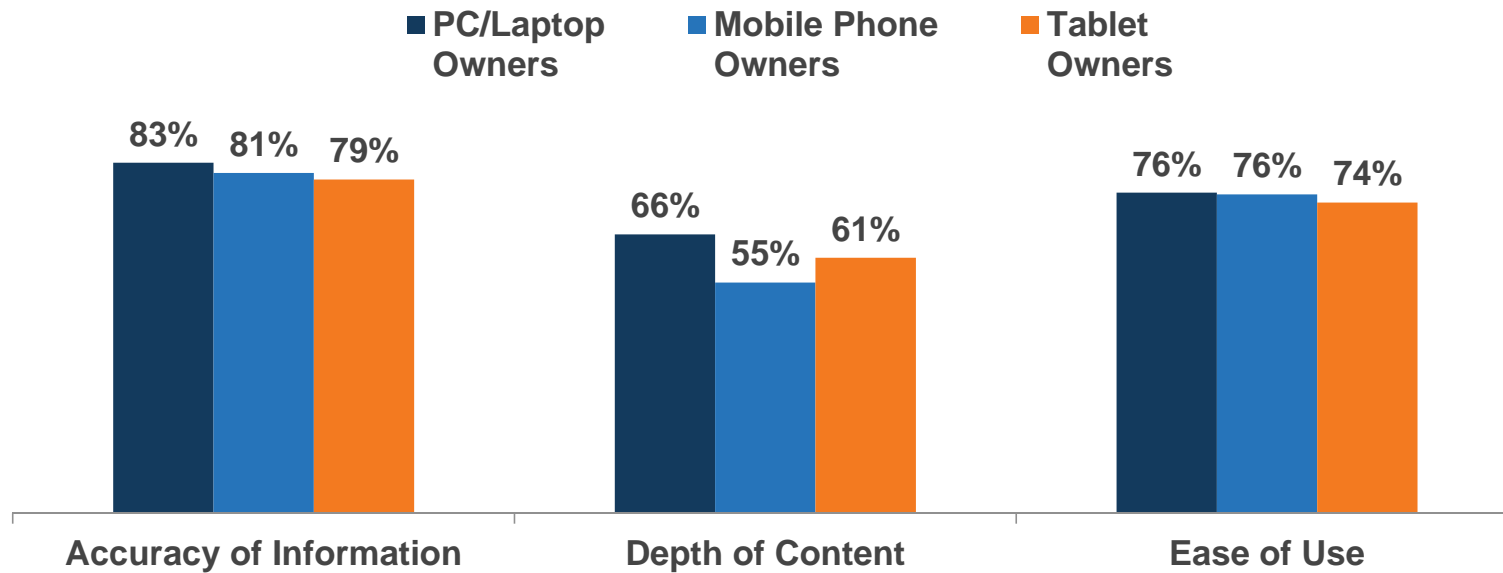
Issues for Local Search



Importance of Features for Device Usage

Smartphone searchers were slightly less demanding of accuracy, while less demanding of depth of information, than desktop searchers. However, most still expect accurate information which is easy to use/find.

Importance of Features for Device Usage



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Executive Summary



- **Mobile Usage is Increasing**
 - Online U.S. consumers are not only searching more frequently, but performing more searches on a wider variety of websites.
- **Local Search Sites & Engines Are Important Consumer Tools**
 - For local business search, these two online info sources beat out all other categories, and what content they contain about a business highly influences a consumers' selection
 - Searchers expect different info based on their motivation, goals, and category searching for
- **'Local' Search Results Are Preferred**
 - When offered a choice, local results are the most trusted and relevant.

Key Study Highlights



- Over two thirds of online local searchers consider **local search results** more relevant and trustworthy than paid or natural results.
 - Less than one in five of those who use **local search sites** for local business searches utilize the map alone.
 - **Half of local searchers** had a specific business in mind when they searched.
 - Among those who most commonly search for restaurants, four out of five say **'hours of operation'** is **one of the top three most important pieces** of information on a map.
- Though **mobile phone usage** for local business searches is growing, satisfaction with them is lower than for other devices.
- Local searchers with a mobile device are more likely to be **at work** when searching for local businesses than “on the go”.
- Nearly half (49%) of Pinterest users **look for promos/special offers** when using social networking sites for local business searches.

Contact Information

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