

# Drivers of Local Mobile Engagement

## Research Study Results

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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 Nielsen study which AT&T Interactive commissioned earlier this year (the "Study"). The Study was conducted by Nielsen in March of 2011, based on Nielsen's audience of volunteer participants. Although AT&T Interactive sponsored the Study for the purpose of obtaining insights into the role of mobile devices in search, decision making, and advertising, the Study was performed by Nielsen and the outcomes reported here are encapsulations of Nielsen's findings. The data presented represent strictly the results of answers by eligible, voluntary participants to questions posed by Nielsen. No other means, including any AT&T 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 AT&T Interactive and/or Nielsen 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 AT&T Interactive or any other affiliate of AT&T.

## Market Presence

**2B+** Annual Searches

**22B+** Paid Ad Impressions

**75M** Monthly UVs on [YP] Local Ad Network

**~\$1B** Online Revenue

## Media Platform



**#33** Ranked Web Domain in the U.S.

**28M** Unique Visitors to YP.com on the Web

**6M+** YPmobile App Downloads on iPhone and Android Devices Combined

**2M+** Calls Made to a Business from YPmobile App Per Month, About 1 Per Second

## Distribution



**Web Mobile Print IPTV**

**300+** Online and Mobile Publisher Sites and Apps including:

- Yahoo
- AOL
- Citysearch
- Telenav
- Layar

Market Presence Sources: AT&T Interactive Analytics, Oct 2011. This data is internal only to AT&T Interactive and has not been subject to third party confirmation or audit.

Media Platform Sources: 1&2) YELLOWPAGES.COM, comScore Media Metrix Top 2000 Web Domains Report, Oct 2011, 3 &4) AT&T Interactive Analytics, Oct 2011. This data is internal only to AT&T Interactive and has not been subject to third party confirmation or audit.

Distribution Sources: 1) comScore Media Metrix, AT&T Interactive Network (Online Search), Oct 2011

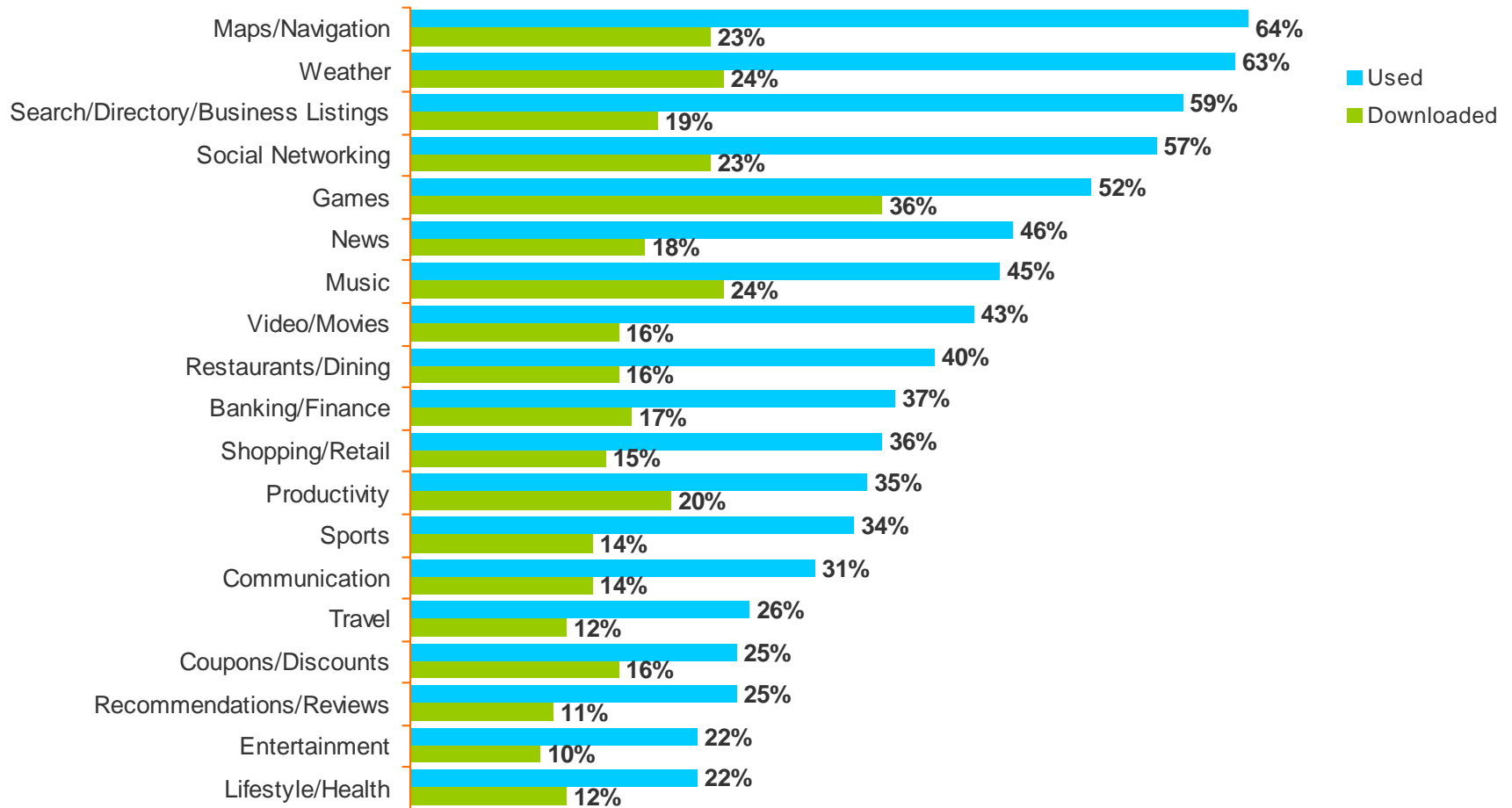
# Research on Mobile Consumer Behavior

- In March 2011, Nielsen surveyed over 1,500 smartphone, feature phone, and tablet owners who have used their device to search for local business on their mobile device (by mobile web or app).
- Objective: provide insights into the role of mobile devices in search, decision making, and advertising. Specifically:
  - **Discovery and purchase:** how consumers research, compare, and make purchase decisions
  - **Lifestyle and consumption:** Focused on location based services (LBS)
  - **Mobile apps vs. mobile web:** Comparisons of users and usage
- The following presentation has been condensed from the topline report and formatted for an industry conference audience
- The research uncovered key drivers of Local Mobile Engagement

All data incorporated into this study is the result of answers to questions posed by Nielsen to its eligible audience of volunteer participants. No other means, including any AT&T assets, were used to confirm responses or collect data. The study and all results are owned by AT&T and not available for purchase from Nielsen. The respondent base is all local mobile searchers surveyed, unless otherwise cited.

# Consumers Have Embraced Mobile As A Way of Life

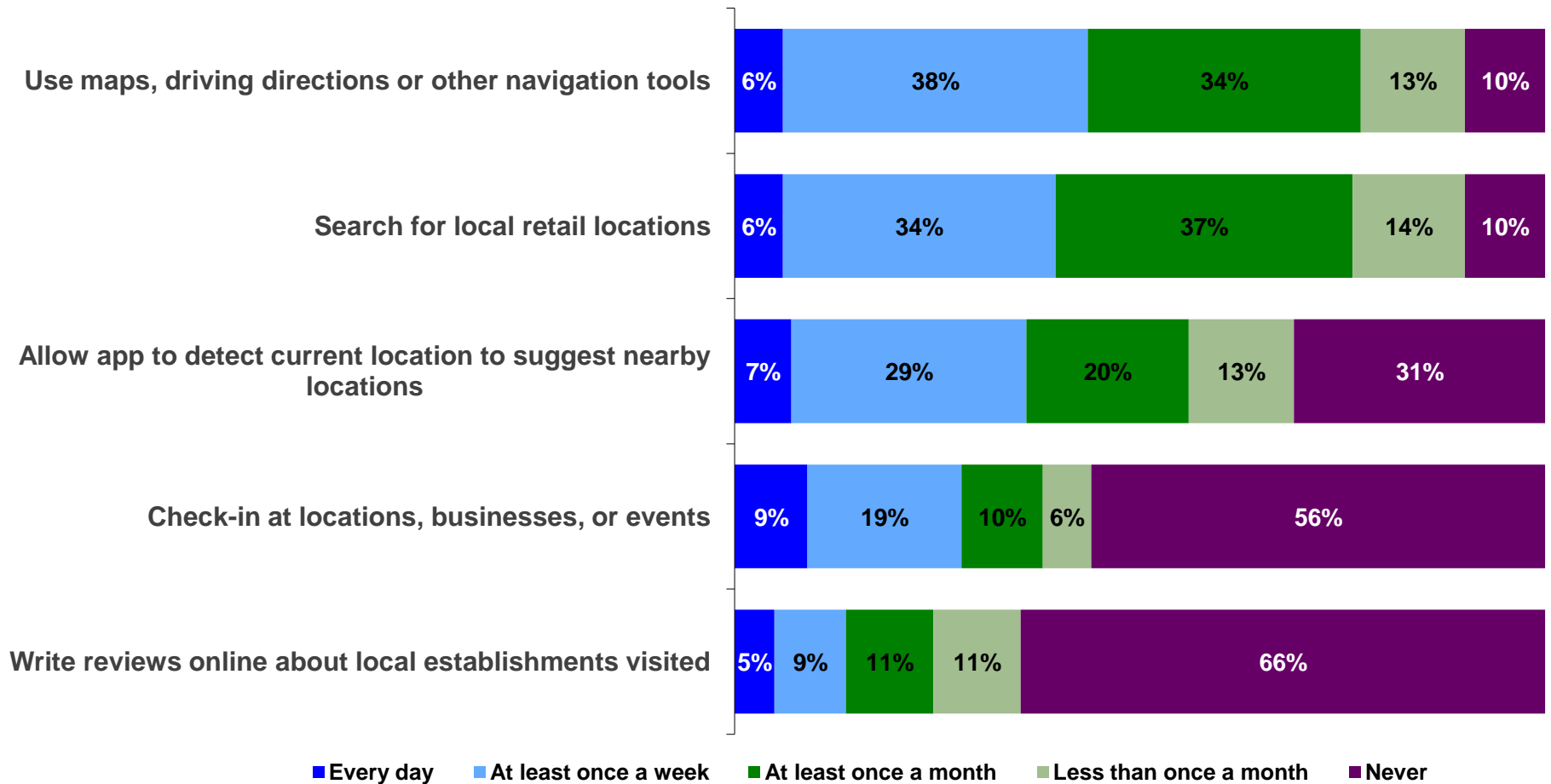
## Category of Apps Downloaded/Used in the Past 3 Months



AT&T Interactive commissioned Nielsen Study of March 2011  
 Base: All Local Mobile Searchers (n=1526)

# ... And Enhance The Consumer Experience With What's "Local" To Them

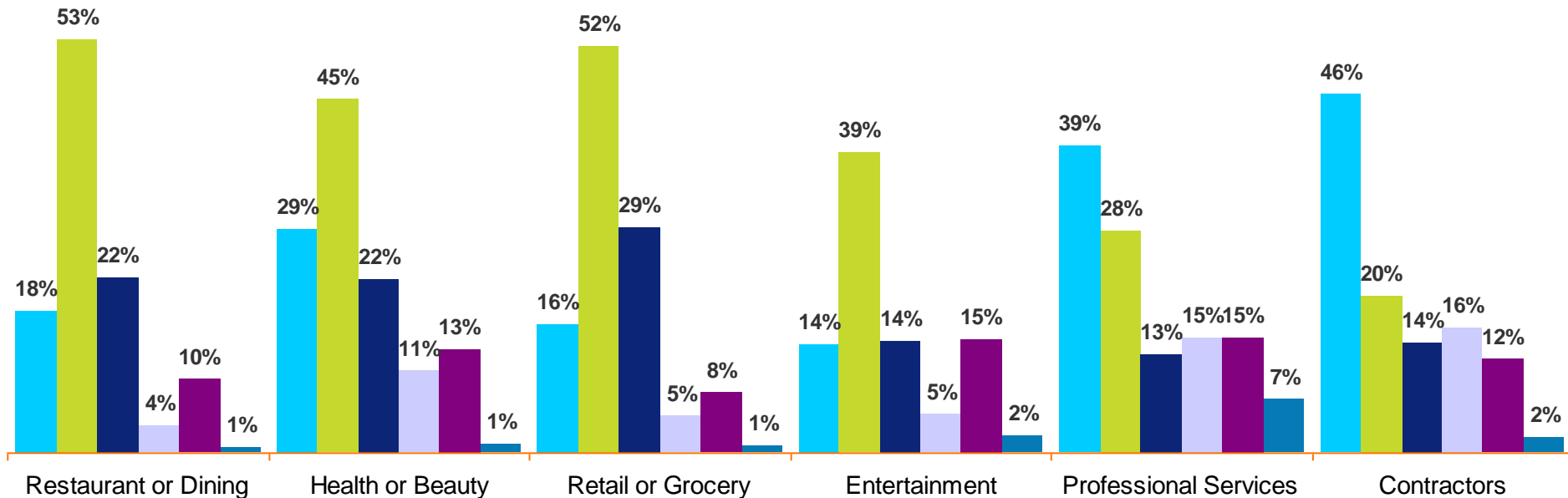
Frequency of Doing Activities on Mobile Device



AT&T Interactive commissioned Nielsen Study of March 2011  
 Base: All Local Mobile Searchers (n=1526)

# ... So It Isn't Surprising That Consumers Often Visit Or Contact A Business After Searching

Action Taken After Last Search



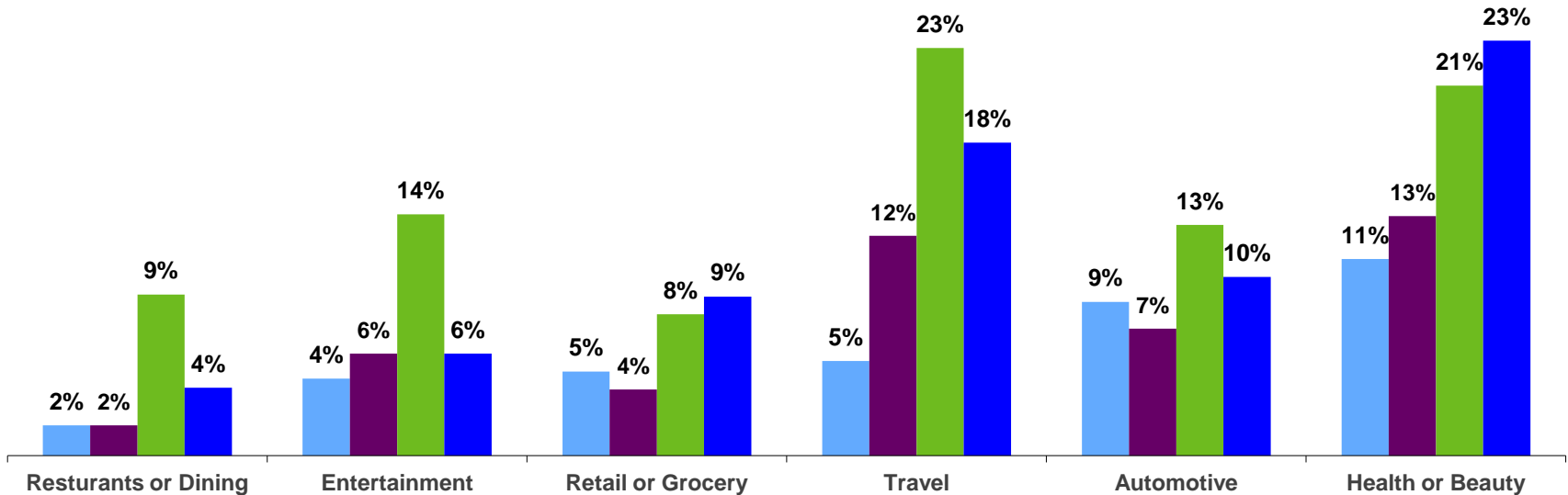
- Contacted a local business/service found on phone/mobile device
- Visited a local business/service found on phone/mobile device
- Made a purchase from a local business/service found on phone/mobile device
- Recommended a local business/service to someone else
- Decided to visit a local business/service at a later date
- Forwarded the business listing/info on my mobile device to someone else

AT&T Interactive commissioned Nielsen Study of March 2011

Base: All who searched for local business/service in each category Restaurant or Dining (n=545), Automotive (n=195), Health or Beauty (n=181), Travel (n=223), Retail or Grocery (n=365), Professional Services (n=102), Contractors (n=50), Entertainment (n=366)

# ...And Continue Mobile Engagement During In-store Visits

Mobile actions taken when visiting local business



- Took and sent a picture of the business or related product to someone else
- Posted a review online
- Checked-in - updated status - tweeted so friends would know where you were
- Redeemed promotions, deals or ads that you received on your mobile device

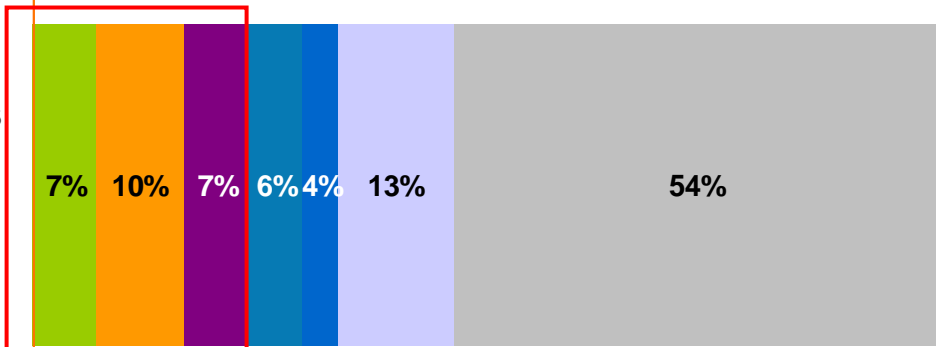
AT&T Interactive commissioned Nielsen Study of March 2011  
Base: Restaurant or Dining (n=289), Entertainment (n=141), Retail or Grocery (n=190),  
Travel (n=57), Automotive (n=70), Health or Beauty (n=82)

# Good News For Marketers: Consumer Engagement Extends To Mobile Advertising

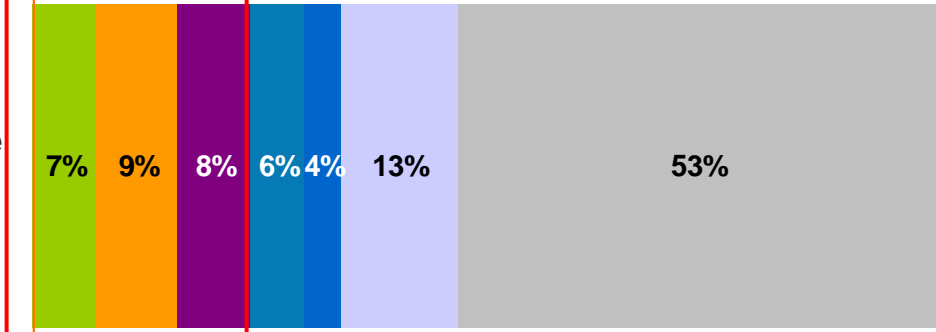
Frequency of Clicking on Mobile Advertising

**1 in 4 click on ads weekly**

Visiting Websites on your phone/mobile device



Using Mobile Apps



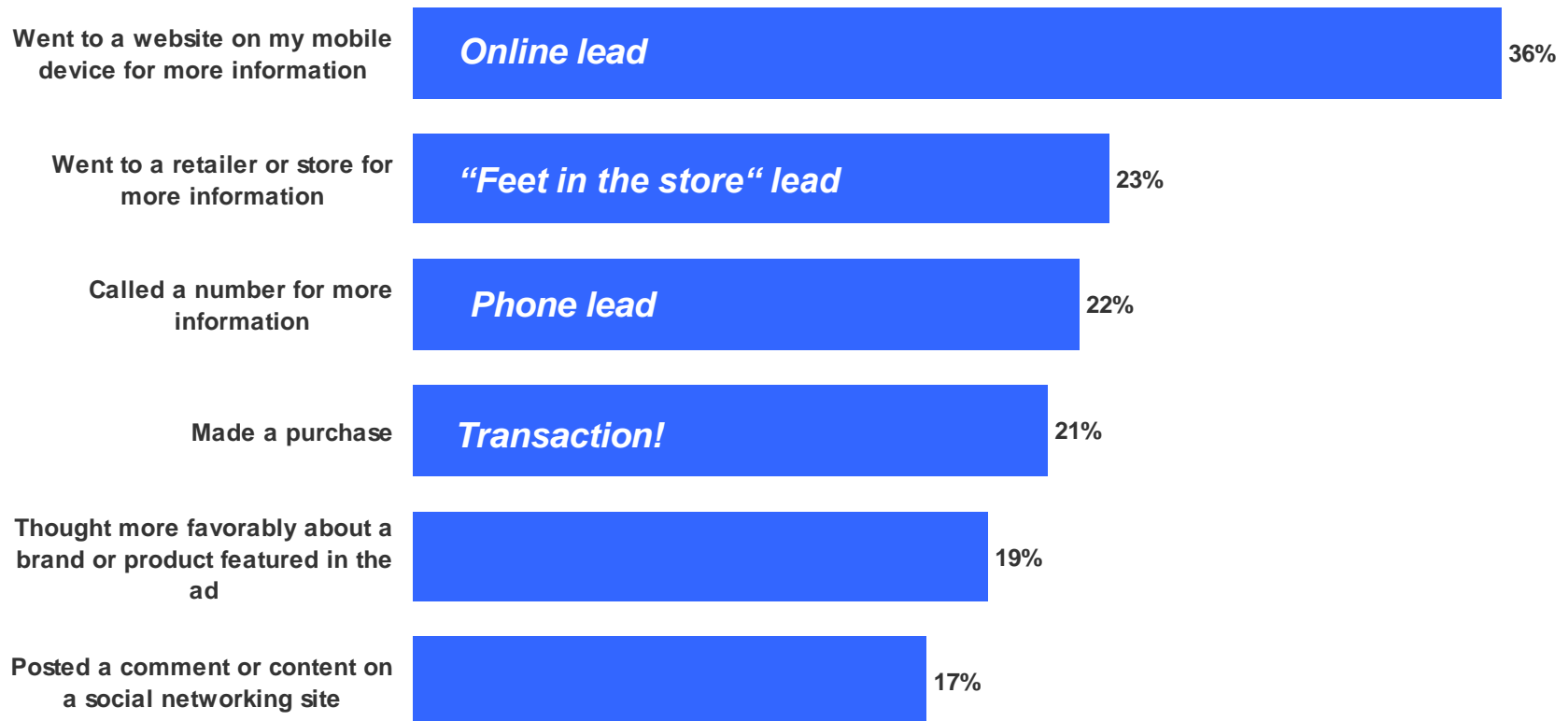
- Everyday
- Several times a week
- Once a week
- to 3 times a month
- Once a month
- Less than once a month
- Never

0% 20% 40% 60% 80% 100%

AT&T Interactive commissioned Nielsen Study of March 2011  
Base: all those who ever clicked on advertising (n=640)

# Engagement With Mobile Ads Often Leads To A Visit To Physical Store

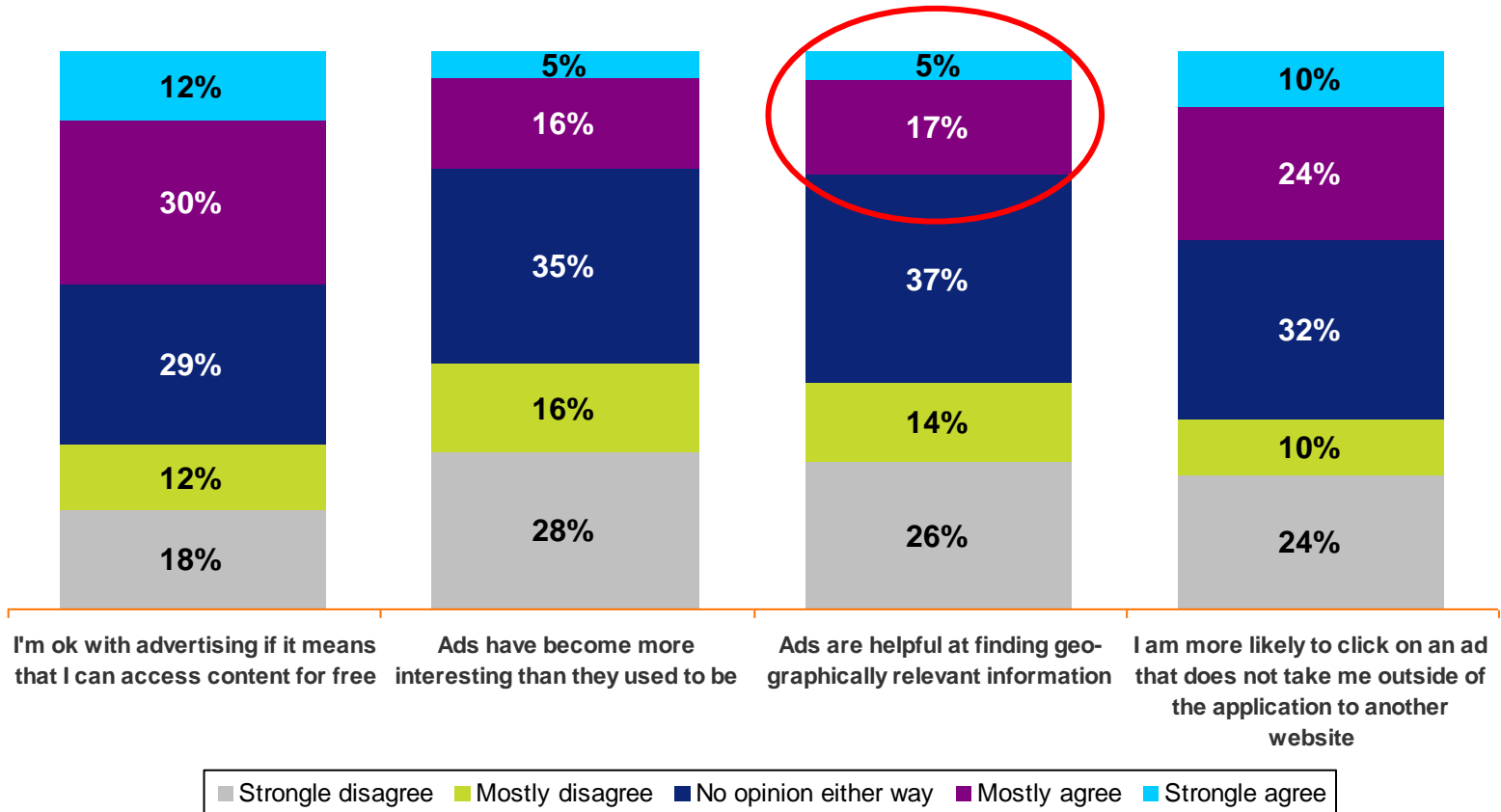
## Actions Taken as a Result of Clicking on/Viewing Mobile Advertising



AT&T Interactive commissioned Nielsen Study of March 2011  
Base: All those who ever clicked on advertising (n=640)

# ... With 2 Out Of 5 Finding It Helpful To Have Ads With Locally Relevant Content

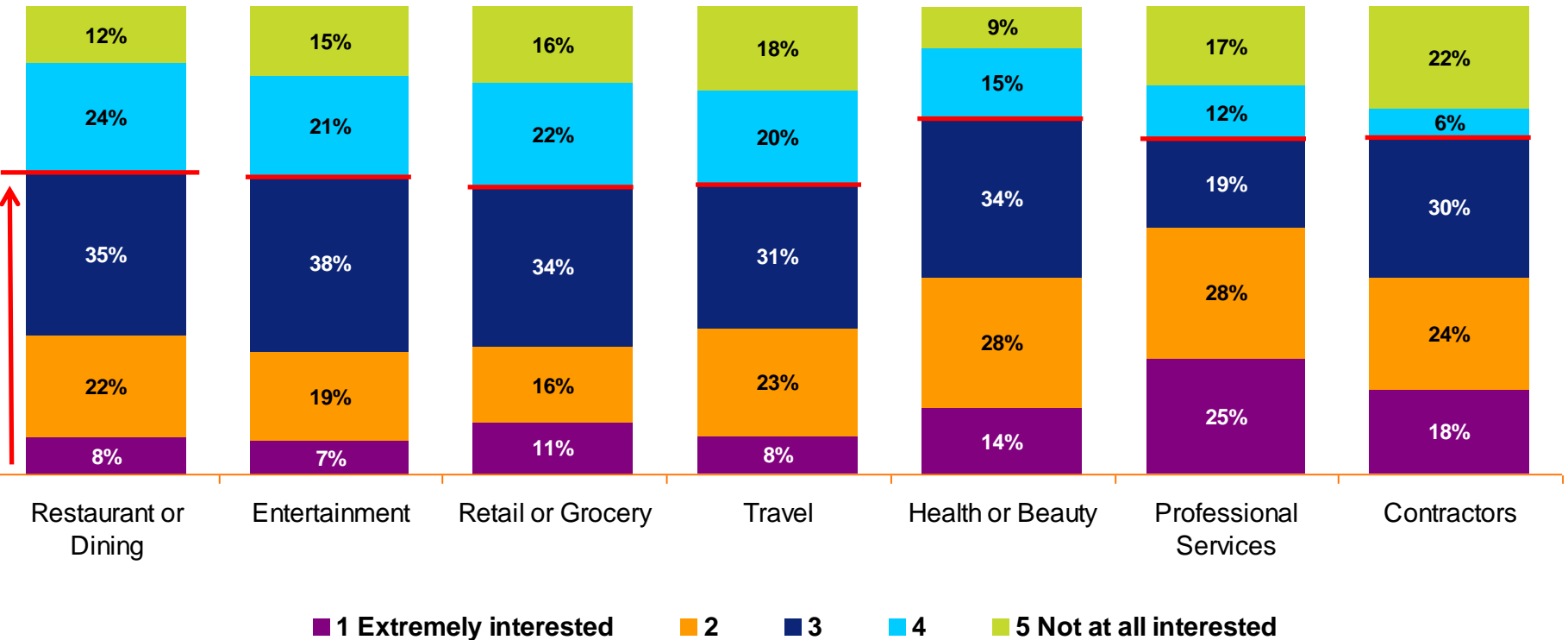
Attitudes Towards Mobile Ads



Source: Mobile Apps Playbook Wave 3 (April 2011)  
 Base: All Respondents (n=4339)

# Consumers Are Also Interested In Receiving Location-based Promotions On Their Mobile Phone

Interest in receiving customized promotions based on location



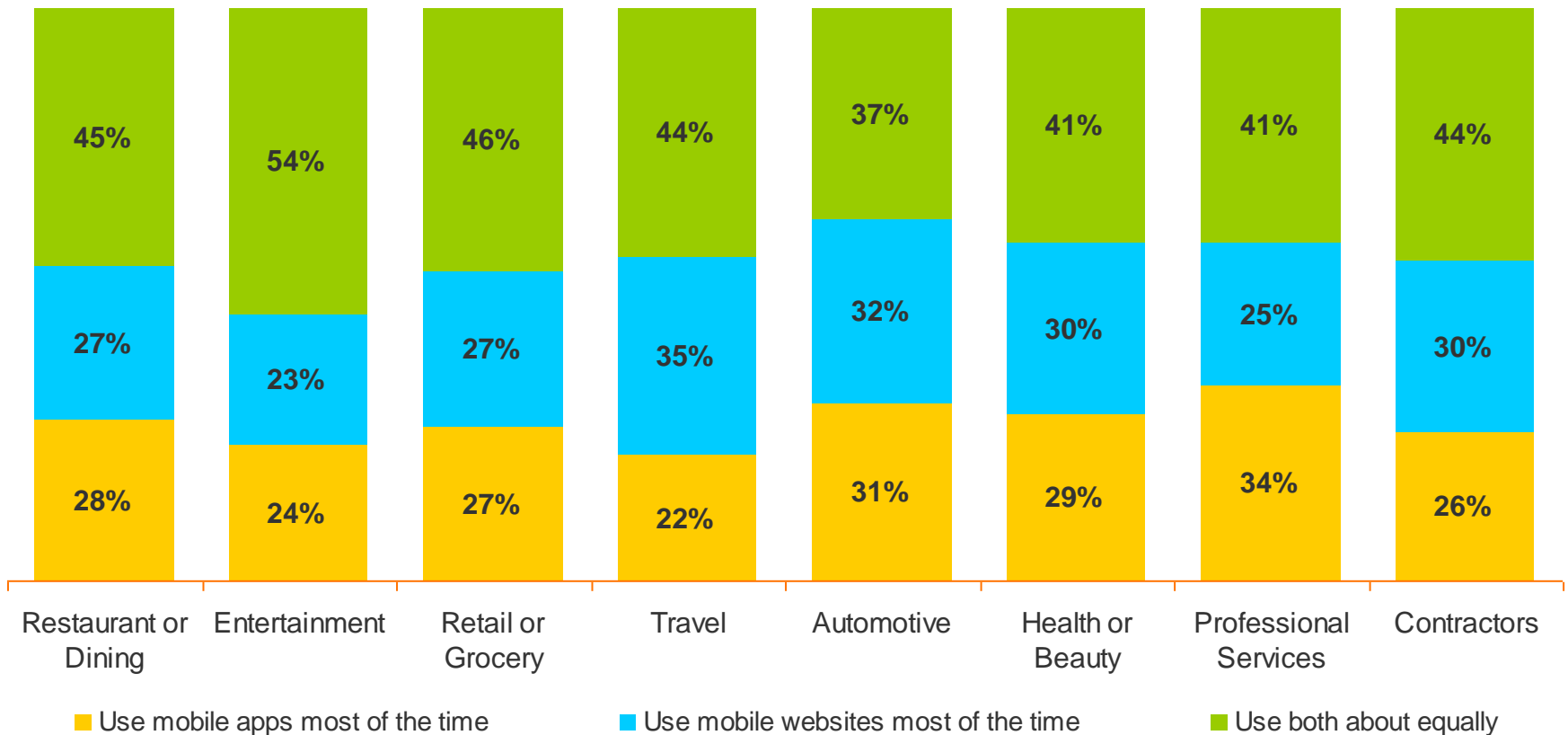
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Base: Restaurant or Dining (n=545), Automotive (n=195), Health or Beauty (n=181), Travel (n=223), Retail or Grocery (n=365), Professional Services (n=102), Contractors (n=50), Entertainment (n=366)

# Marketers Need To Be On Both Mobile Apps And Mobile Webs To Maximize Reach

## Usage of Mobile Apps vs. Websites For Local Searches Across Categories

Base: All who searched for local business/service in each category

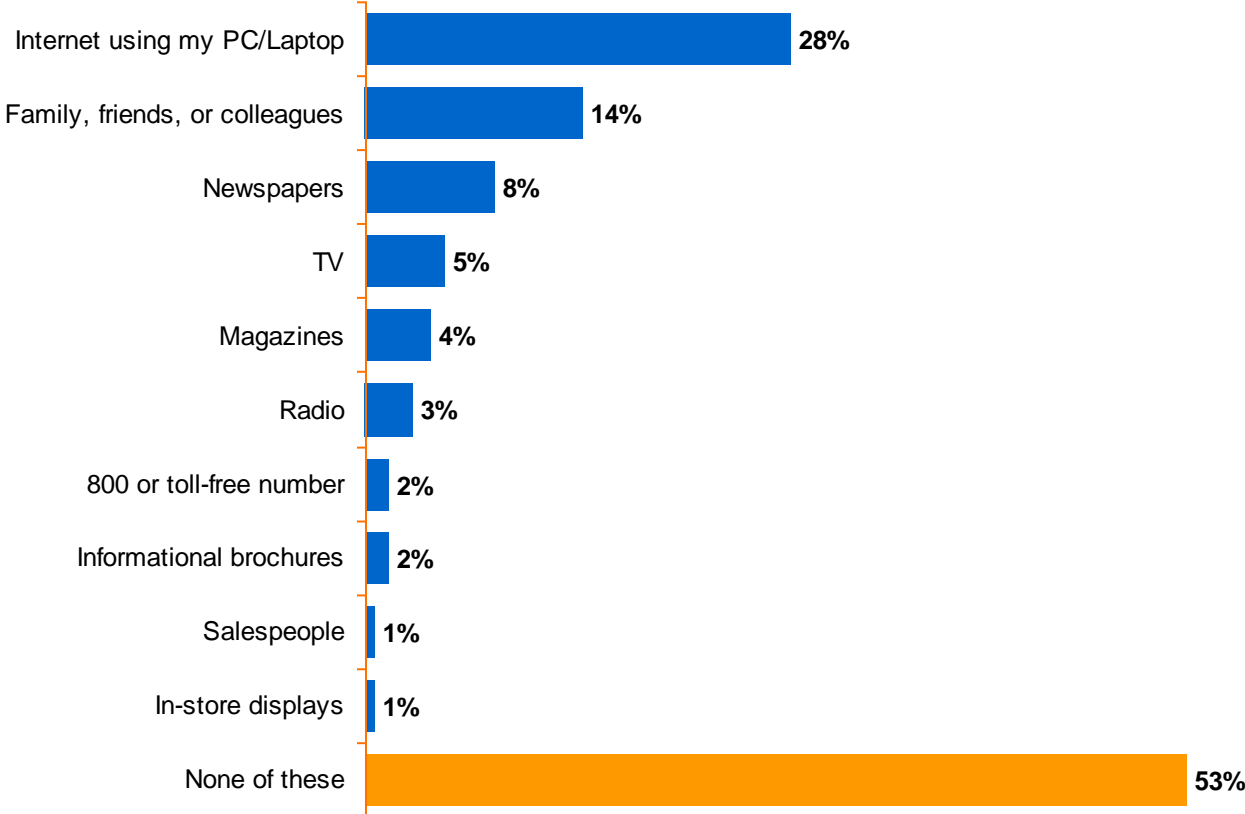


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# In Some Verticals, Not Being On Mobile May Mean Missing Half Your Prospects

## Other Sources Used for Last Local Restaurant Search



AT&T Interactive commissioned Nielsen Study of March 2011

Base: All that have searched for Restaurant/Dining information and category selected (n=545)



# Thank you!

For detailed results on the study, read our whitepaper:

*"Finding What You Need —*

*How Consumers Make Mobile Purchase Decisions and Consumer Advertising"*

Download it for free:

**[www.attinteractive.com/research](http://www.attinteractive.com/research)**