

Who Does NOT Use Print Yellow Pages?



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We spend a lot of effort trying to understand the characteristics of those who use Yellow Pages, but what about those that do not? Key insights can be gained by better understanding this group. While there is a tendency to just accept the fact that some do not use Yellow Pages, understanding who the non-users are can create an opportunity to proactively advertise and reach out to this group and potentially win them over as users.

About 24% of the adult population of the US currently does not use Print Yellow Pages. The goal of this paper is to identify which groups within the population are most likely to be non-users. The analysis in the paper is based on data from the Spring 2010 Simmons National Consumer Survey.

The first thing that is learned from studying the data about non-users is that one must take great care when talking about non-users. It is rarely possible to make broad generalizations about non-users. Frequently, while a particular group may have a high percentage of non-users, others in that group are higher-than-average users of the Print Yellow Pages. Such is the case for Hispanics. 37% of Hispanics are non-users, considerably higher than the 24% average for the total population. However, the 63% of Hispanics that do use Print use it **25% more frequently** than average.

Thus, each group discussed below might have two distinct subsets: one subset that doesn't use Print Yellow Pages at all, while the subset uses Print directories more intensively than average. Whenever the polarization is pronounced, the differences are noted in the discussion.

Also, to put things in context, across all groups identified below with high levels of non-users, typically about 33% are non-users. That leaves 67% of each group that still use Print. In fact, across these groups, the two-thirds that DO use Print Yellow Pages average 7% higher than average usage than the total population. **Clearly, even for the groups where usage of Print Yellow Pages is most at risk, the majority still find value in the product!**

When statements are made, such as Males are 14% more likely to be non-users, the percentages are made in reference to the 24% of the total adult population that do not use Print Yellow Pages. The table at the end summarizes the key data for each of the groups discussed below.

Gender:

- **Males** are 14% more likely to be non-users, while females are 13% **less likely** to be non-users.

Age:

- **18-24 year-olds** are 89% more likely to be non-users. (However, the 51% that do use Print use it **6% more** than average.)

- **25-34 year-olds** are 31% more likely to be non-users. (However, the 68% that do use Print use it **14% more** than average.)

Ethnicity:

- **Hispanics** are 42% more likely to be non-users. Hispanics account for 20% of all non-users. (However, the 63% of Hispanics that do use Yellow Pages use them **25% more** often than average.)

Life Events:

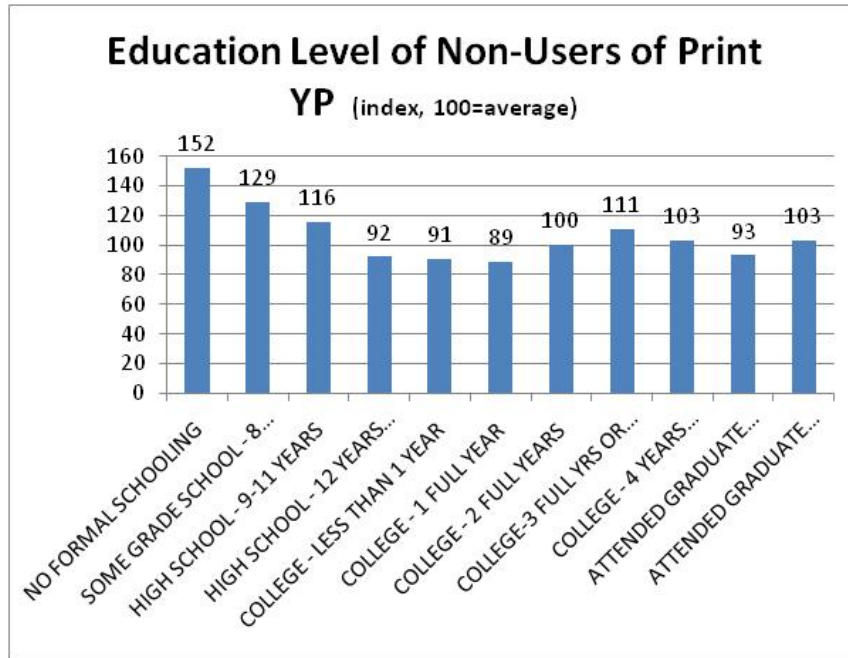
- Life events are the major driver of Yellow Pages usage.
- **Those that experienced no event** in the past year are 20% more likely to be non-users. Furthermore, those among this group that did use Print Yellow Pages used it 10% less often than average. These individuals account for 33% of all non-users.
- **Those that anticipate no events** in the coming year are 28% more likely to be non-users. Furthermore, those among this group that did use Print Yellow Pages used it 28% less often than average.

Marital Status:

- **Singles** are 22% more likely to be non-users than married individuals. (However, the 73% of singles that do use Print Yellow Pages use them **17% more often** than average.)

Education:

- Those with **only a grade school education or less** are the most likely to not use Yellow Pages - see the chart below. Otherwise the level of education has virtually no correlation with whether people are non-users or not. (The 60% of this group that do use Print Yellow Pages use it about **70% more** than average.)

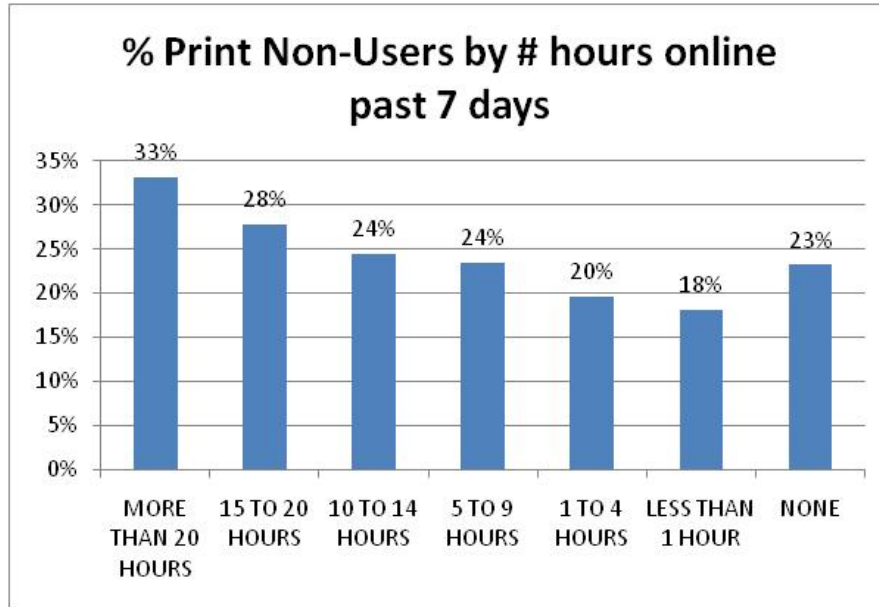


Employment Status:

- **Full-time students** are 79% more likely to be non-users. 44% of full-time students do not use Print Yellow Pages. Furthermore, those among this group that did use Print Yellow Pages used it 42% less often than average. Clearly if one wants to increase usage in the future, this is an important group to target.
- **Those who have never worked** are 99% more likely to be non-users. 53% of these individuals do not use Print Yellow Pages.

Internet Usage:

- Those with **no online activity** are 35% more likely to be non-users of Print Yellow Pages as well. Furthermore, those among this group that did use Print Yellow Pages used it 20% less often than average. This group represents about 11% of all non-users.
- 33% of those who **spend 20 or more hours a week online** do not use Print Yellow Pages - 40% more than average. (However, the 67% of this group that do use Print use it **26% more** than average.) See the chart below.



Memberships in Community / Church / Social / Educational Organizations:

- **People who do not belong** to any of these types of organizations are 34% more likely to be non-users of Print Yellow Pages.

Kind of Residence:

- 28% of the population are renters.
- **Renters** are 24% more likely to be non-users. (However, the 70% of renters that do use Print Yellow Pages use it **41% more** than average.)

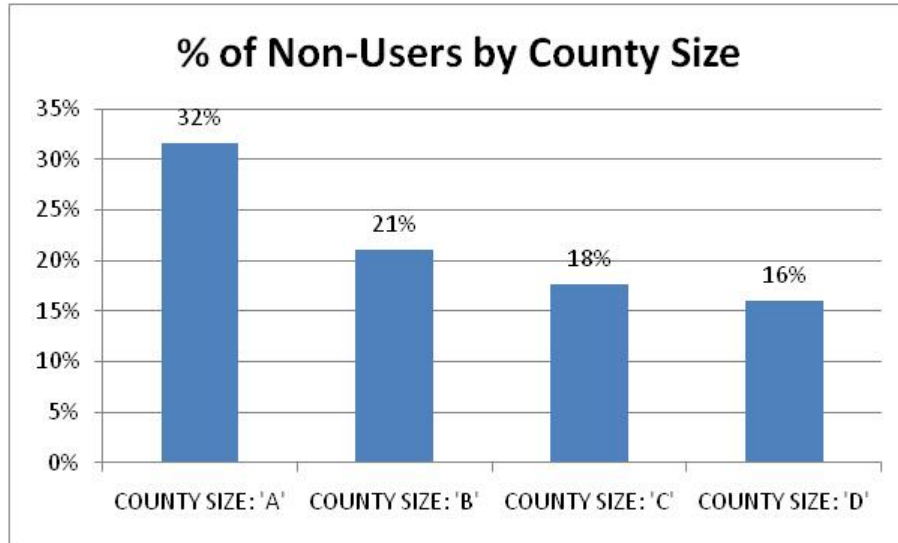
Region of the Country:

- People in **the Northeast** are the most likely to be non-users - 19% more than average. 29% of people in the Northeast do not use Print Yellow Pages. Furthermore, those that do use Print in the Northeast use it 23% less frequently than average.
- People in the **West** are slightly more likely to be non-users - 12% more than average. (However, the 78% that do use Print in the West use it **8% more** frequently than average.)

County Size:

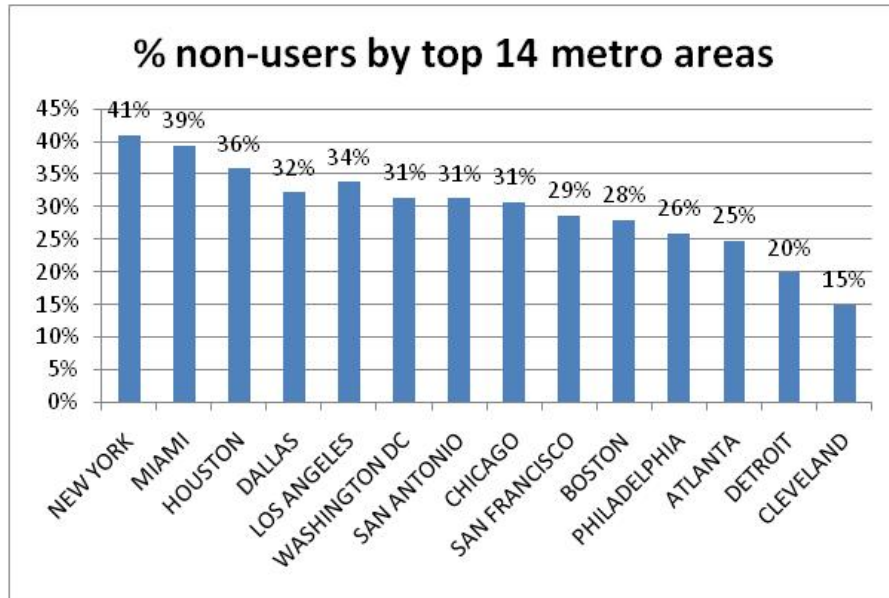
- People living in the **largest metropolitan counties - County Size A** - are the most likely to be non-users. The percentage of non-users drops significant for Size B and smaller counties.
- 39% of those who are **renters in A-size counties** are non-users of Print Yellow Pages. (However, the 61% that do use Print, however, use it **14% more** than average.)

- 60% of **single males who are renters in A-size counties** are non-users of Print Yellow Pages. (However, the 40% that do use Print use it **77% more** than average!)



Top 14 Metro Areas:

- **New York** has the highest percentage of non-users of Print, at 41% of the adult population. Furthermore, those that do use Print in the New York use it 20% less frequently than average.
- New York is followed by **Miami** with 39% non-users and **Houston** with 36%.
- Although 36% do not use Yellow Pages in **Houston**, the 64% that do use Print use it **21% more** than average.
- 34% of those in **Los Angeles** are non-users - 35% higher than average. Furthermore, those in Los Angeles that do use Print Yellow Pages use it 17% less than average.
- Although 31% of the population do not use Print in **Washington D.C**, the 69% that do use Print **41% more** than average.



Shopping Attitudes / Behaviors:

- **Consumers who rate themselves "below average" or "far below average" as "Smart Shoppers"** are 16% more likely to be non-users of Print Yellow Pages.
- **Consumers who rate themselves "below average" or "far below average" as "Informed Shoppers"** are 25% more likely to be non-users of Print Yellow Pages.
- Consumers who rate themselves **"far below average" for "advertising receptivity"** are 18% more likely to be non-users of Print Yellow Pages.
- One third of those who rate themselves "far above average" as "early adopters" do not use Print Yellow Pages. (However, the other two-thirds that do use Print use it **36% more** than average.)

Summary

It is difficult to make general statements about non-users of Yellow Pages. Many demographic or social groups appear to have two distinct subsets - one which does not use Print at all, and the other which uses it significantly more than average.

There are only a few groups that have both a high level of non-users and lower-than-average usage among the remaining population. These groups are:

- Those than experienced no major events in the past year
- Those who have no online activity
- Full-time students
- Those that have never worked
- People living in the Northeast
- People living in New York, Los Angeles, Chicago, San Francisco, or Boston

People who do not see themselves as Informed Consumers.

All other groups examined in this paper have one subset of "heavy Print users" and another subset of non-users.

Rather than take usage behavior as "fixed" for each group, it is worth asking why one subset uses Print YP more than average and the other not-at-all? What can be done to convert more of the non-users to users of the medium? When the behavior of the majority of a group shows they receive clear value from the print directories, what can be done to convince the others of the value?

Appendix: Summary of Data

Group	Group Non-User Index	% of group that are Non-Users	% of group that are PYP Users	Usage Level among users
Total Adult Population	100	24%	76%	100%
Males	114	28%	72%	102%
18-24	189	46%	54%	106%
25-34	131	32%	68%	114%
Hispanic Origin	142	37%	63%	125%
Events: No event experienced in past yr	120	29%	71%	90%
Events: No event anticipated in next 12 months	128	30%	70%	72%
Marital Status - not married	111	27%	73%	117%
Education: No formal Schooling	152	45%	55%	184%
Education: Some grade school - 8 years or less	129	36%	64%	156%
Employment Status: full-time student	179	44%	56%	58%
Employment Status: never worked	199	53%	47%	85%
No online activity	135	33%	67%	80%
Online-Home - more than 20 hours/week	143	33%	67%	126%
Online-Home - 15 to 20 hours/week	120	28%	72%	93%
Memberships - Belong to: None	134	32%	68%	93%
Residence: Renter	124	30%	70%	141%
Single male, 18-24, renter	243	60%	40%	177%
Census Region: Northeast	119	29%	71%	77%
Census Region: West	112	27%	73%	108%
County Size "A" - large metro areas	130	32%	68%	91%
Renter, Live in county size A	154	39%	61%	114%

Group	Group Non-User Index	% of group that are Non-Users	% of group that are PYP Users	Usage Level among users
Top DMAs				
NEW YORK	166	41%	59%	80%
MIAMI	161	39%	61%	94%
HOUSTON	147	36%	64%	121%
DALLAS	135	32%	68%	110%
LOS ANGELES	135	34%	66%	83%
WASHINGTON DC	133	31%	69%	141%
SAN ANTONIO	127	31%	69%	101%
CHICAGO	122	31%	69%	89%
SAN FRANCISCO	119	29%	71%	83%
BOSTON	119	28%	72%	74%
Psychographic Scales:				
Commerce: FAR BELOW AVERAGE	122	29%	71%	122%
Smart Shopper: FAR BELOW AVERAGE	113	27%	73%	92%
Smart Shopper: BELOW AVERAGE	119	29%	71%	111%
Informed Consumer: FAR BELOW AVERAGE	123	29%	71%	77%
Informed Consumer: BELOW AVERAGE	126	31%	69%	107%
Advertising Receptivity: FAR BELOW AVERAGE	118	29%	71%	109%
Early Adopter: FAR ABOVE AVERAGE	136	33%	67%	136%