Impact of Search Listings for Local Businesses

August 2014

Google Confidential and Proprietary

Background and Methodology

Google and Ipsos MediaCT partnered to better understand the value to both consumers and small businesses of business listing attributes as they appear in search engine results. Potential listing attributes include business photos, phone number, hours of operation, website and user reviews.

This report explores the path to purchase, shopper attitudes and behavior, as well as impact of complete business listings within Google Search.

1,000 respondents were recruited and completed a 20 minute online survey, which fielded between July 8, 2014 and July 22, 2014.

Respondents met the following criteria for inclusion in this research:

- Ages 18-64
- Have used search to research any purchases in past 6 months
- Made a purchased within a least one category within past 6 months
- Sole or shared decision-maker for the category

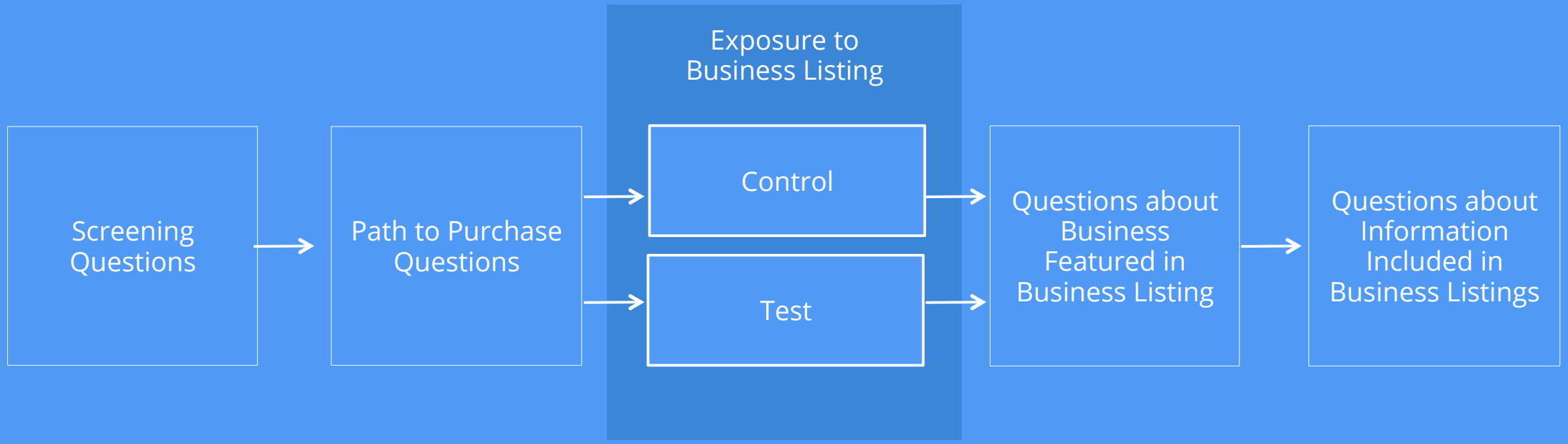
The 5 categories covered by this program are:

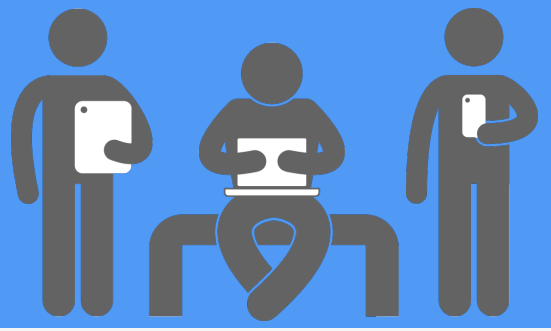
- Bakery
- Mechanic
- Salon / Barber shop
- Flower/Plant shop
- Hardware store

Respondents were assigned one of the 5 categories based on natural fallout with a minimum of 100 per category.

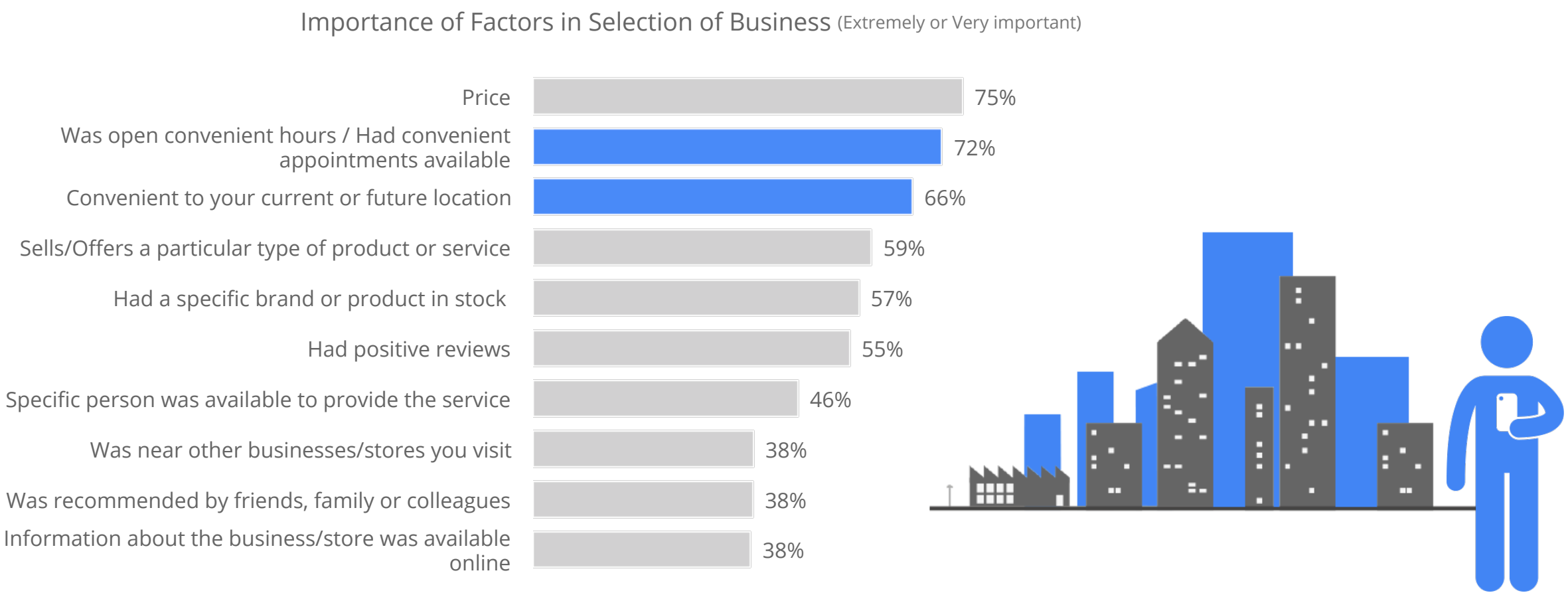
Respondents were also exposed, based on random assignment, to one of two Search Engine Results Pages in a "laboratory environment" containing a business listing for the assigned category. Respondents in the control cell saw a listing with minimal information, while respondents in the test cell saw a verified listing for the same business. After exposure to the listing, respondents were asked about their perceptions of the business and expectations for the different types of information provided in the listing.

Research Design and Survey Flow



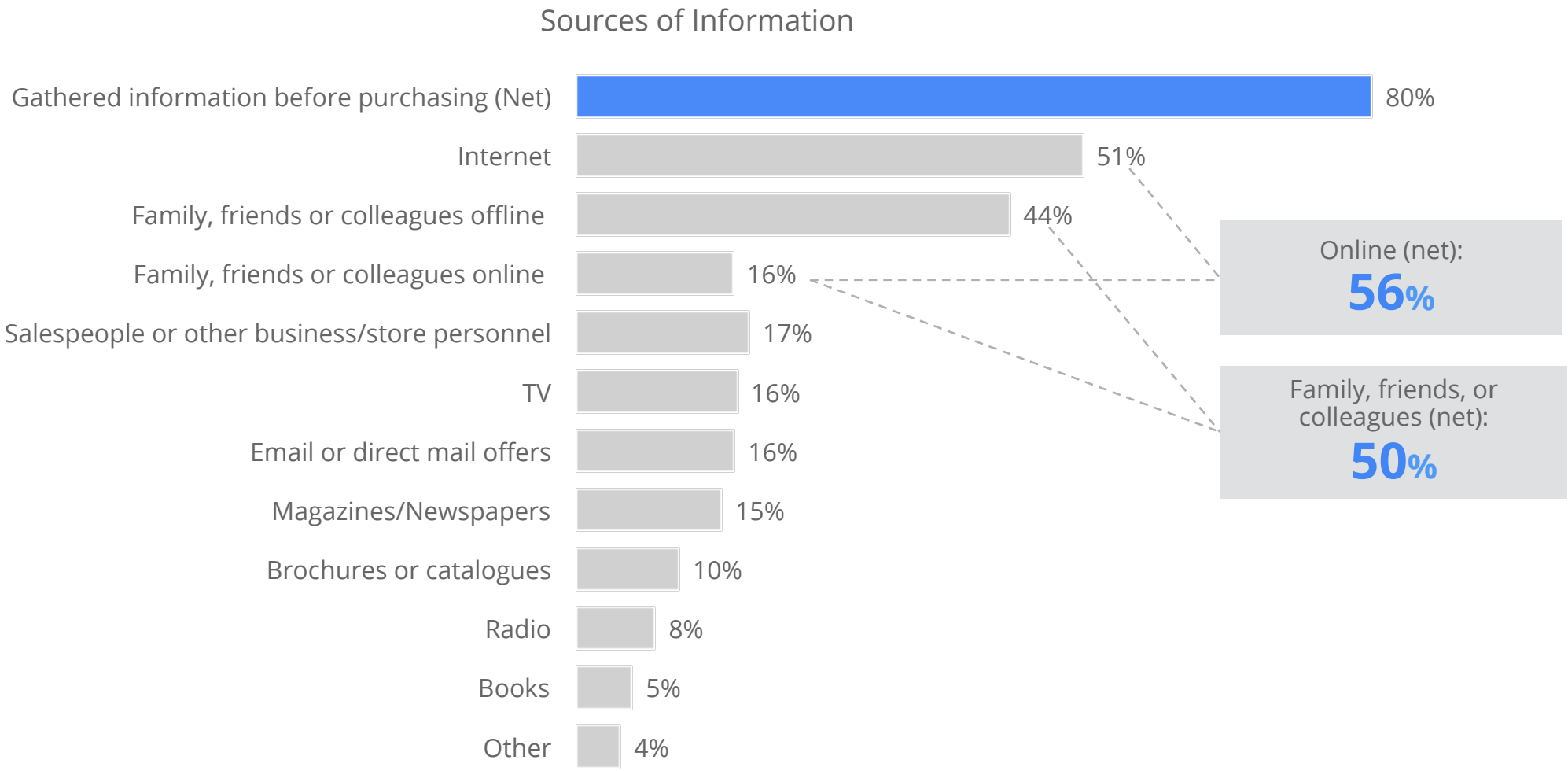


Convenient hours and location play an important role in the decision to buy locally



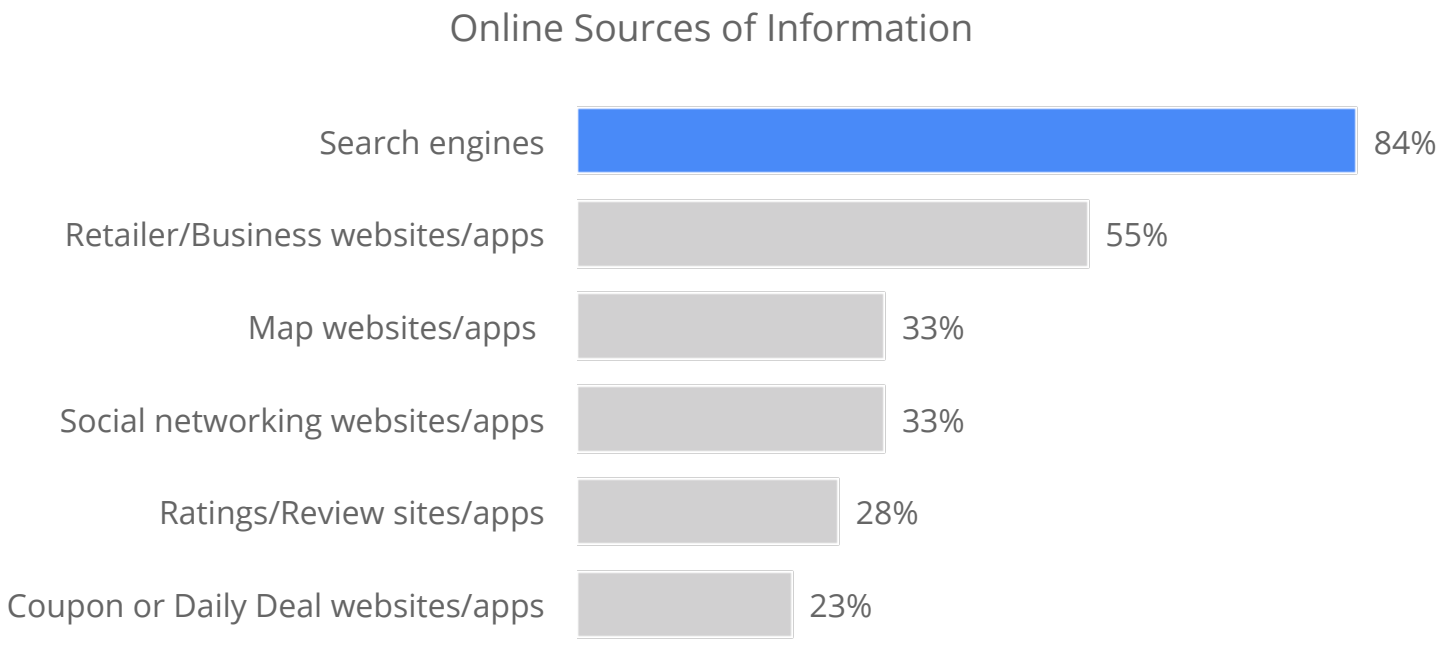
Base: Total Respondents (n=1000)
Q. How important were each of the following factors in selecting a business/store to purchase [CATEGORY] from in the past 6 months?
Note: In stock factor was shown only if bakery, flower, or hardware quota and person availability was shown only if mechanic or salon quota

Consumers rely on WOM and the Internet for information prior to purchase



Base: Total Respondents (n=1000)
Q. Which of the following sources did you use to gather information about [CATEGORY] in the past 6 months? Please think about any information gathering you did about products, services, brands or businesses/stores. Please select all that apply.

Consumers turn to search engines to gather information for local purchases



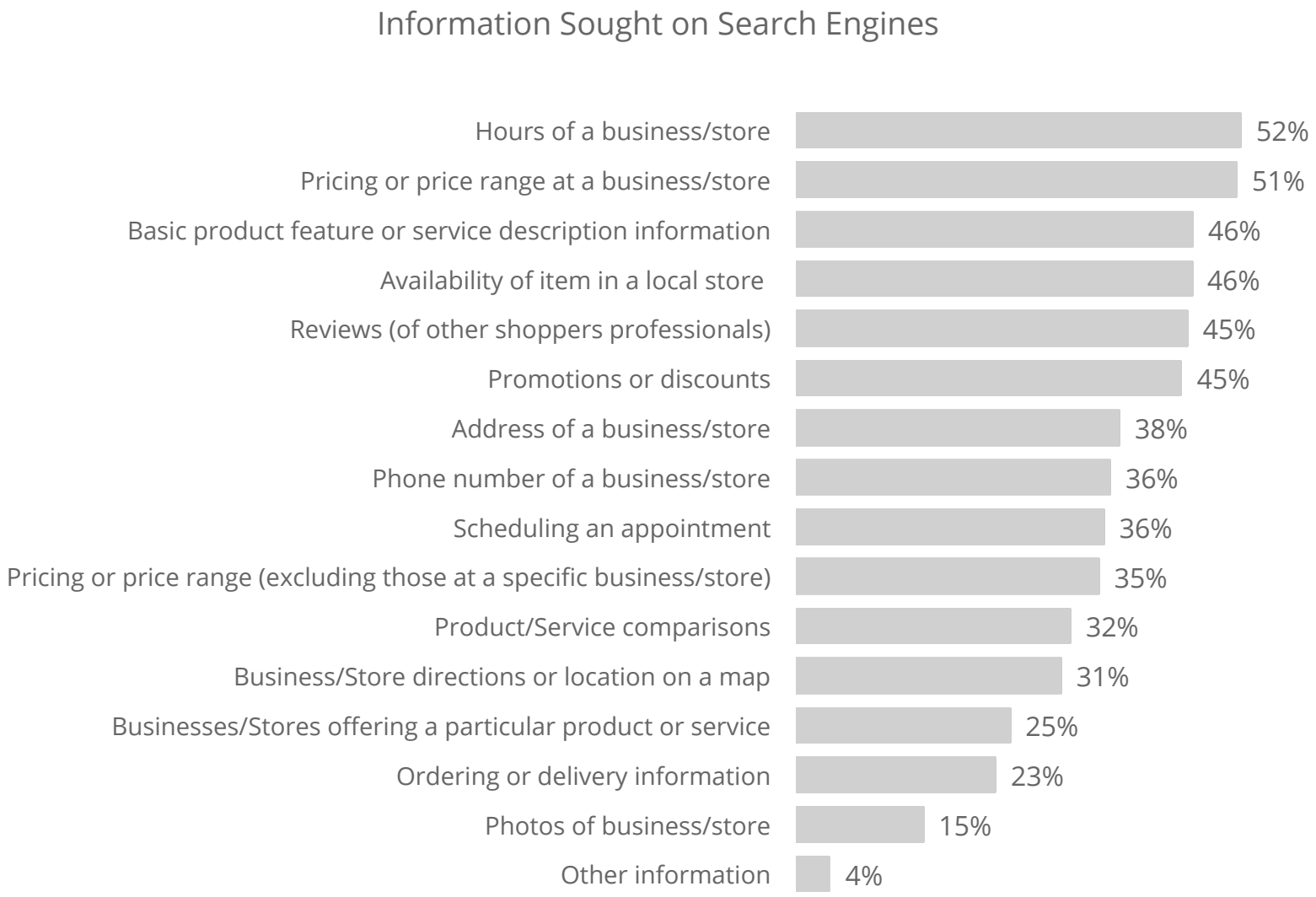
Base: Gathered Info Using Internet (n=561)
Q. Did you use the following websites or applications ("apps") in the past 6 months for the [CATEGORY] you purchased? Please think about any information gathering you did about products, services, brands or businesses/stores.

Consumers rely heavily on search engines early on while gathering information

Timing of Usage of Sources	Beginning	Middle	End
Search engines	**83%**	**29%**	**10%**
Coupon or Daily Deal websites/apps	48%	50%	21%
Social networking websites/apps	47%	45%	23%
Retailer/Business websites/apps	45%	50%	21%
Map websites/apps	**44%**	**38%**	**31%**
Ratings/Review sites/apps	40%	55%	18%

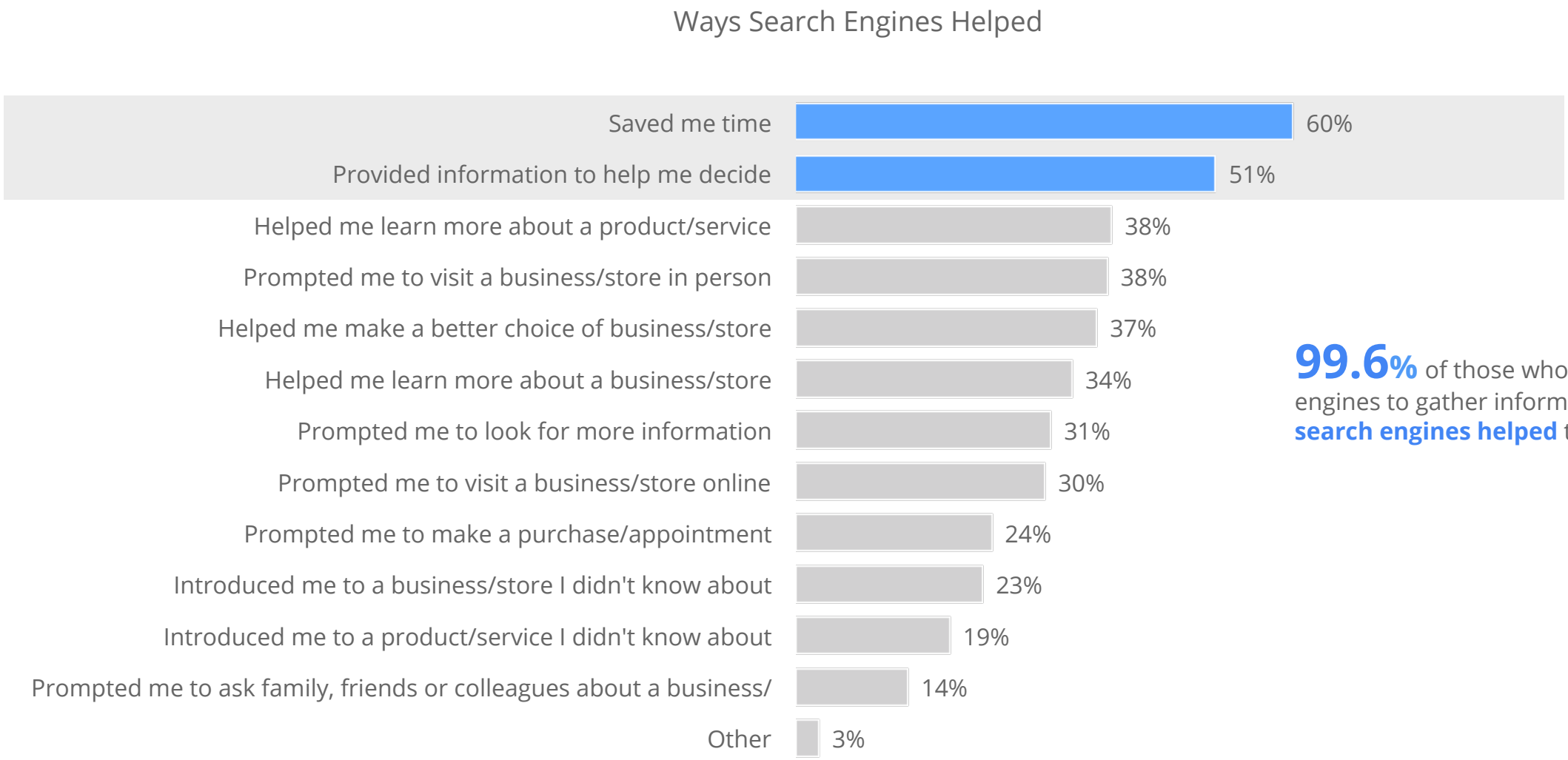
Base: Used Specific Online Sources to Gather Info (floating base)
Q. When during your information gathering process did you use each of these sources? Please select all that apply for each.

Consumers seek out business hours via search engines



Base: Used Search Engines To Gather Info (n=474)
Q. What type(s) of information related to your purchases of [CATEGORY] did you look for using search engines? This can include any information gathered about products, services, brands or businesses/stores. Please select all that apply.
Note: Scheduling an appt. was asked only if mechanic or salon quota and ordering/delivery information was asked only if bakery, flower, or hardware quotas.

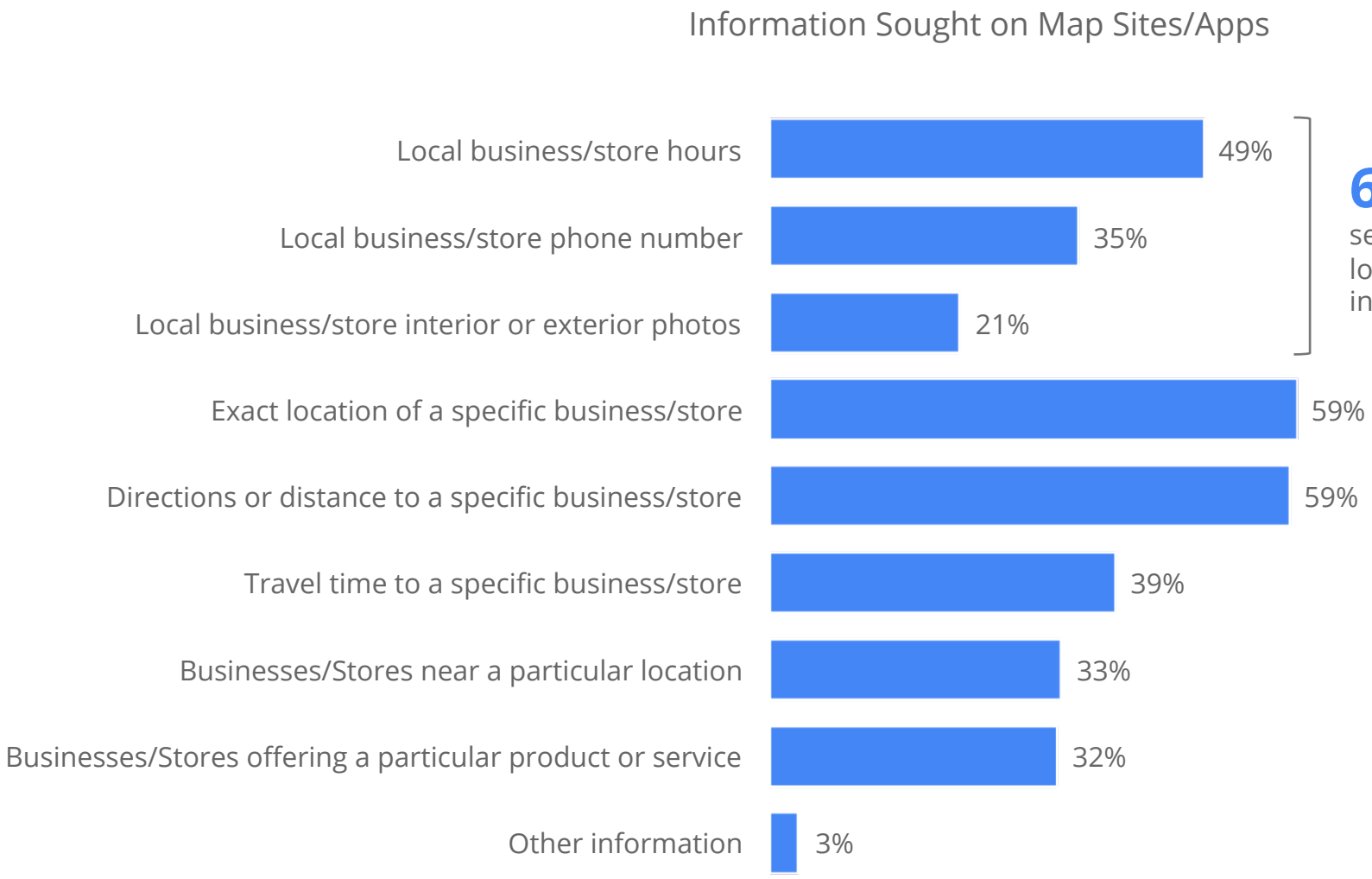
Consumers say that search engines help them save time and make decisions



99.6% of those who used search engines to gather information say **search engines helped** them

Base: Used Search Engines To Gather Info (n=474)
Q. How did search engines help you, if at all, while you gathered information about [CATEGORY]? Please select all that apply.

2 in 3 consumers looked for local business information on map sites/apps

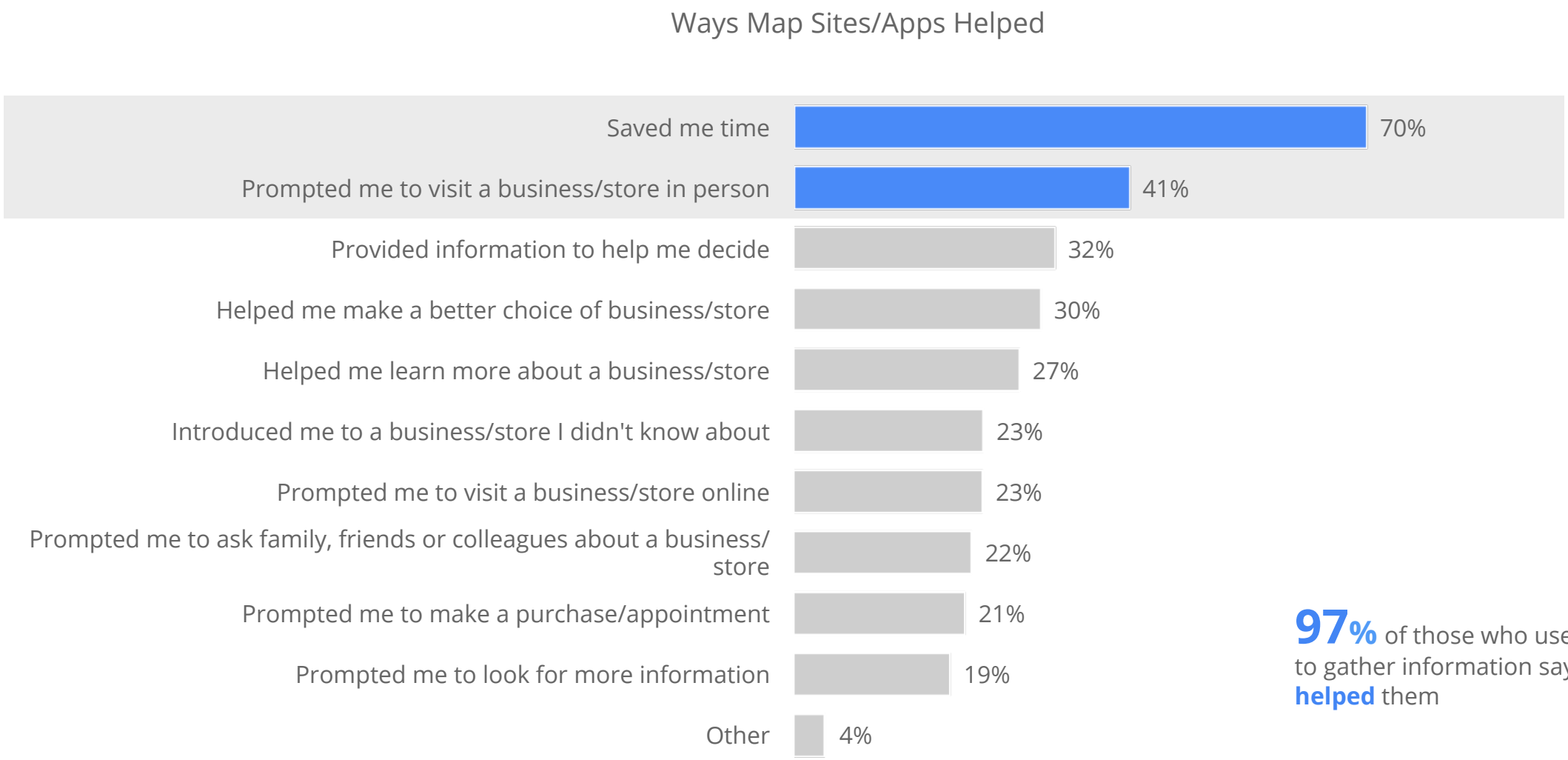


65% searched for local business information

90% found information on map sites/apps (among those looking for the info on maps)

Base: Used Map Sites/Apps To Gather Info (n=186), Used Map Sites/Apps to Gather the Specific Info (floating base)
Q. What type(s) of information related to your purchases of [CATEGORY] did you search for using map sites/apps? This can include any information gathered about products, services, brands or businesses/stores. Please select all that apply. Q. Thinking about the information you looked for related to, did you find each type of information you were looking for using map sites/apps?

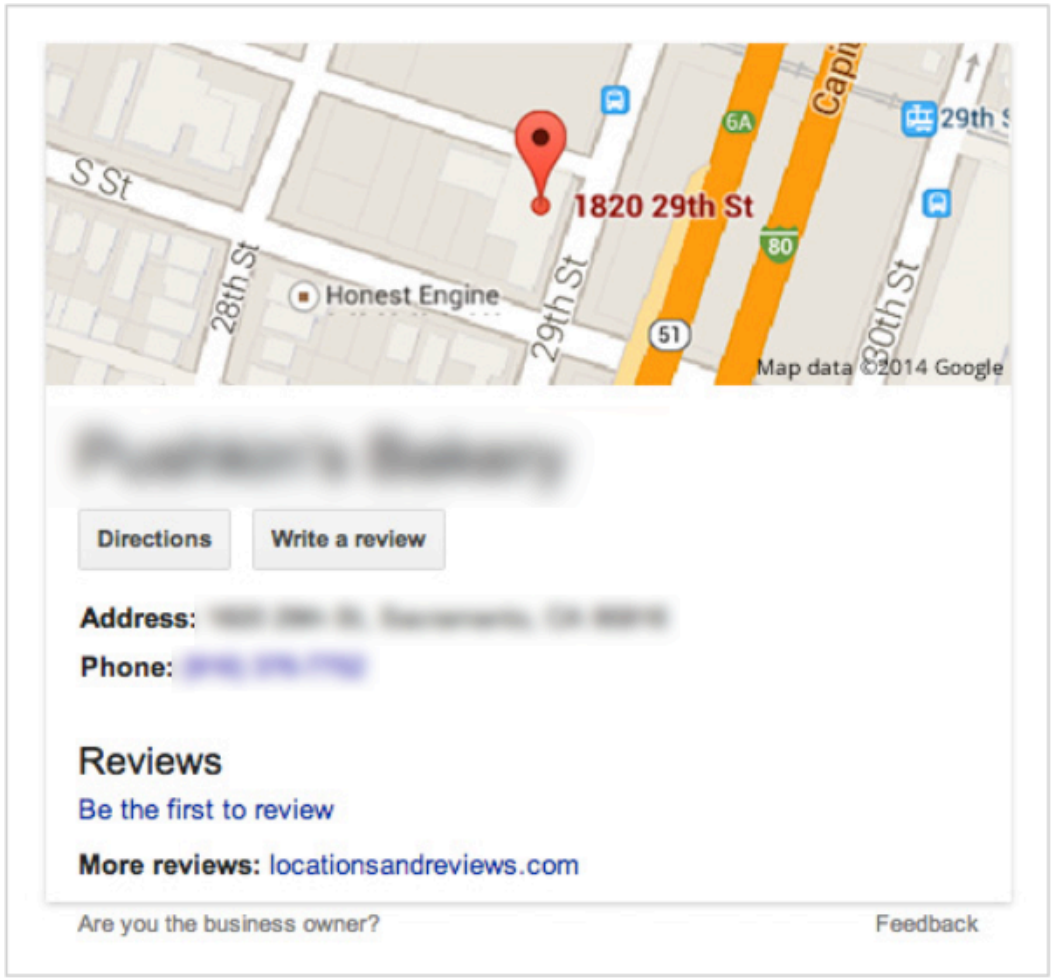
Consumers say that map sites/apps help them save time and prompt in store visits



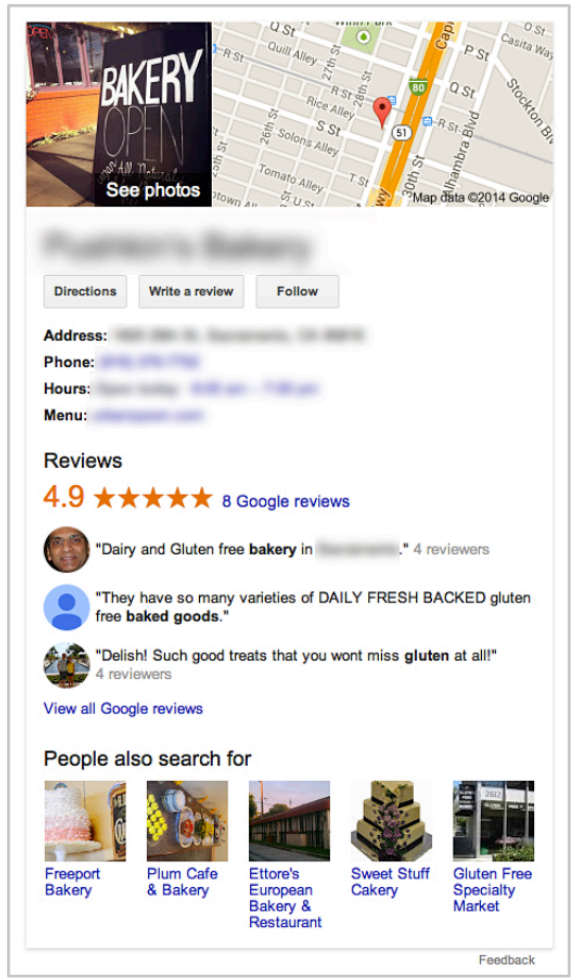
97% of those who used maps to gather information say **maps helped** them

Base: Used Map Sites/Apps To Gather Info (n=186)
Q. And, how did map sites/apps help you, if at all, while you gathered information about **[CATEGORY]**? Please select all that apply.

Exposure to Business Listing

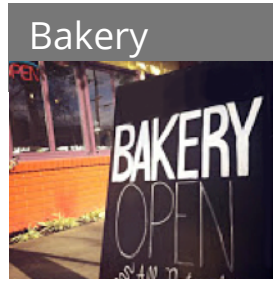


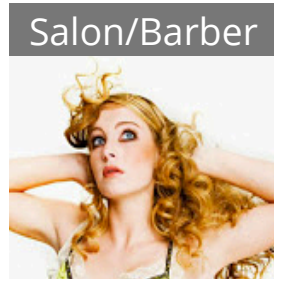
Control



Test

Categories





Categories: bakery, mechanic, salon, flower shop, hardware store; min n=100 per category

Complete Listings within Search ...

Engage Interest

51% more likely to be viewed as **worth reading more information about**

43% more likely to be viewed as **has what I need**

79% more likely to be viewed as **a place for someone like me**

Establish Trust

78% more likely to be viewed as **well-established**

197% more likely to be viewed as **a place I can depend on**

91% more likely to be viewed as **knows what it's doing**

201% more likely to be viewed as **current**

215% more likely to be viewed as **offers the latest products or services**

Create Positive Brand Equity

501% more likely to be viewed as **well-liked**

204% more likely to be viewed as **offers quality products or services**

94% more likely to be viewed as is **a reputable business**

199% more likely to be viewed as **cares about its customers**

Motivate Action

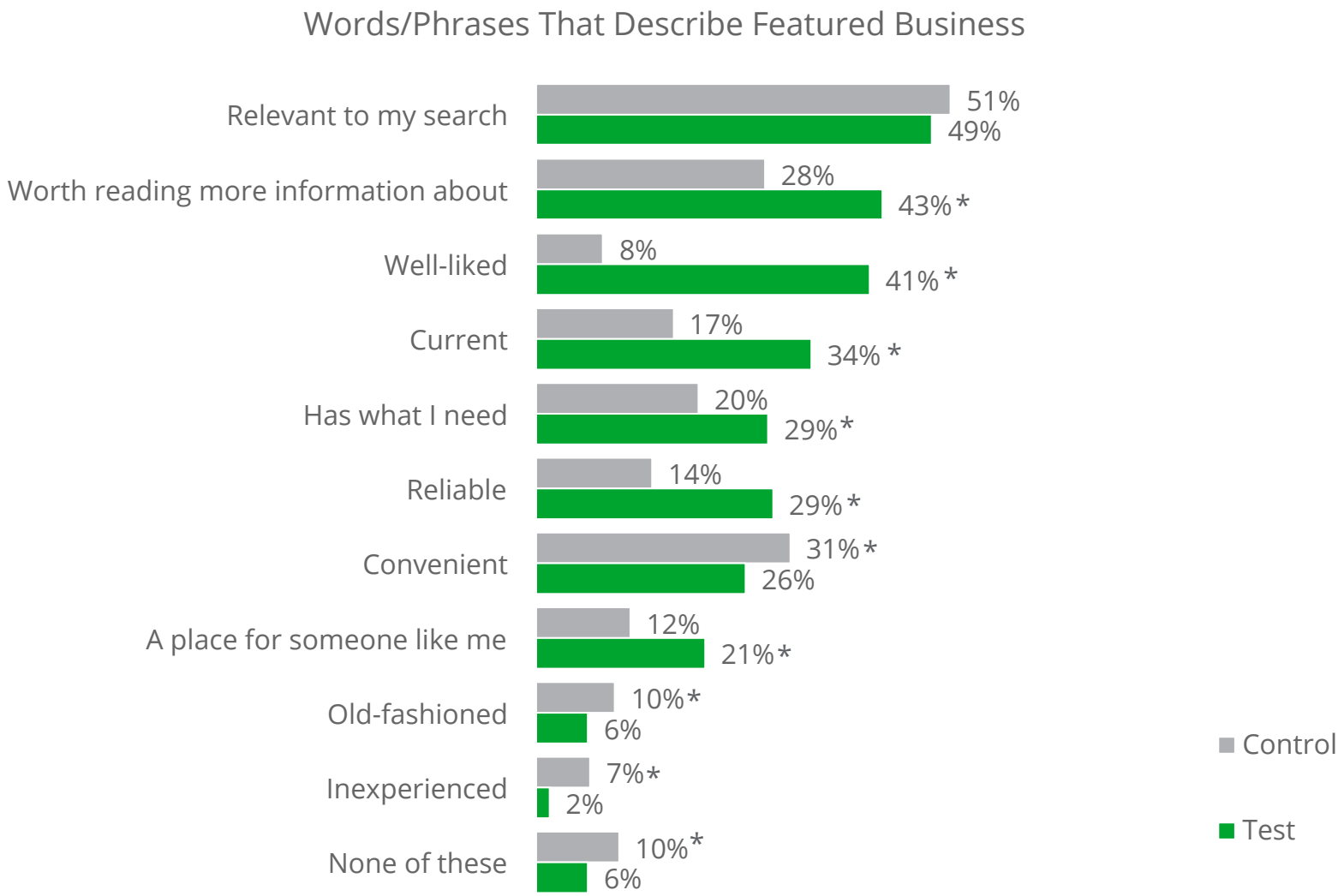
38% more likely to be viewed **as a business I would visit**

29% more likely to motivate consumers to **visit the business**

29% more likely to motivate consumers to **consider purchasing from this business**

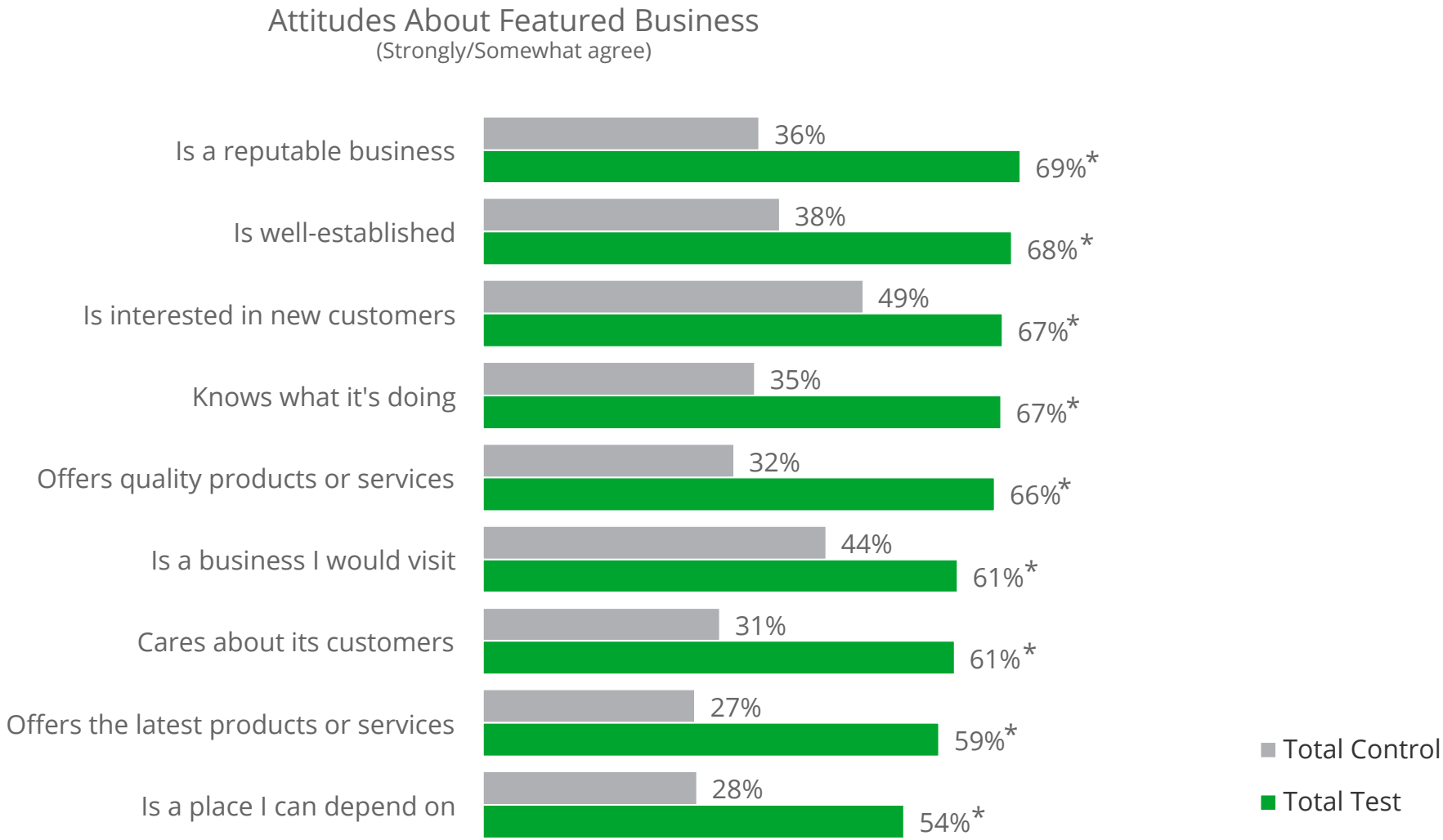
Percentages are based on businesses with complete listings as compared to businesses with incomplete listings.

Businesses with complete listings are more likely to be viewed positively than businesses with incomplete listings



Base: Saw Listing (Control=494, Test=496)
Q. The search results you saw featured a business. Just based on what you saw, which of the following words or phrases, if any, do you think describe this business? Please select all that apply.
**indicates significant difference at the 95% confidence level*

Consumers are more likely to trust businesses with complete listings

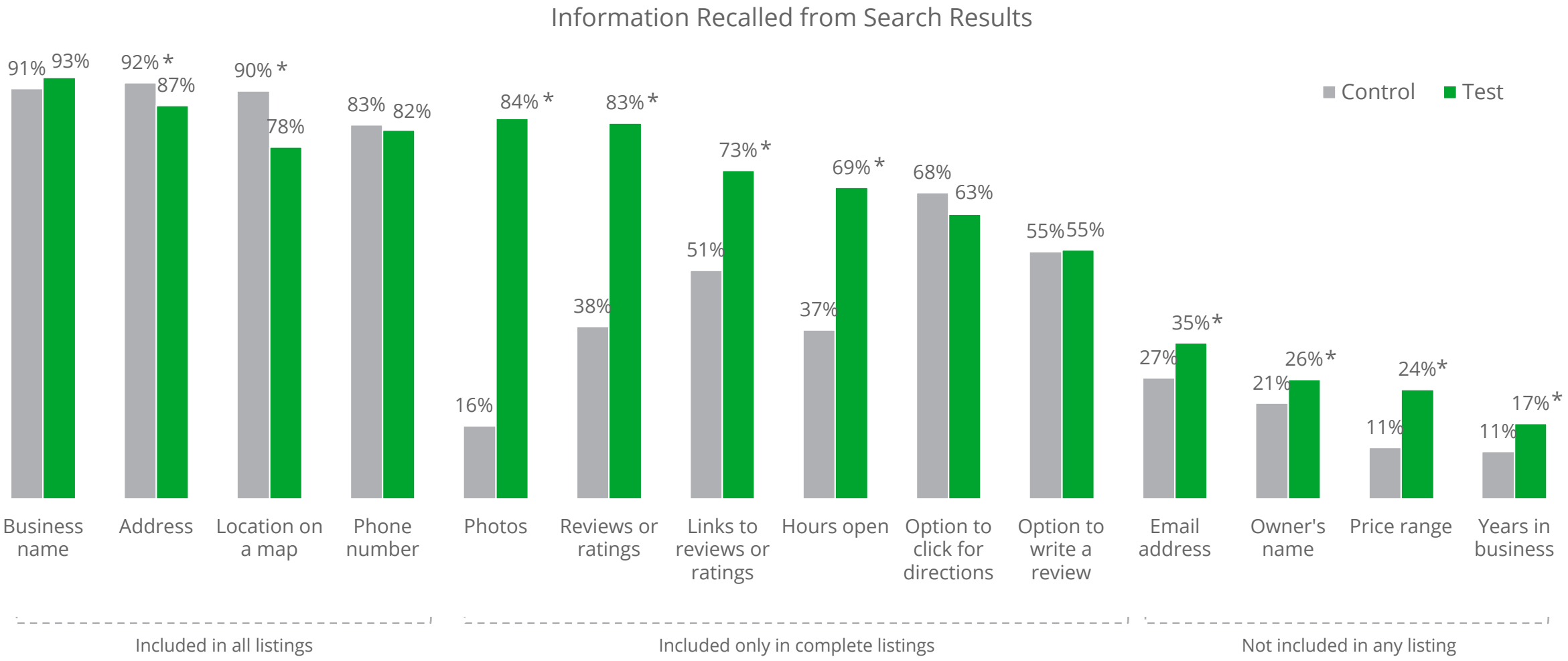


Base: Saw Listing (Control=494, Test=496)
Q. Just based on what you saw, how much do you agree or disagree that each of the following describes the business?
**indicates significant difference at the 95% confidence level*

Consumers are significantly more likely to visit and consider purchasing from businesses with complete listings

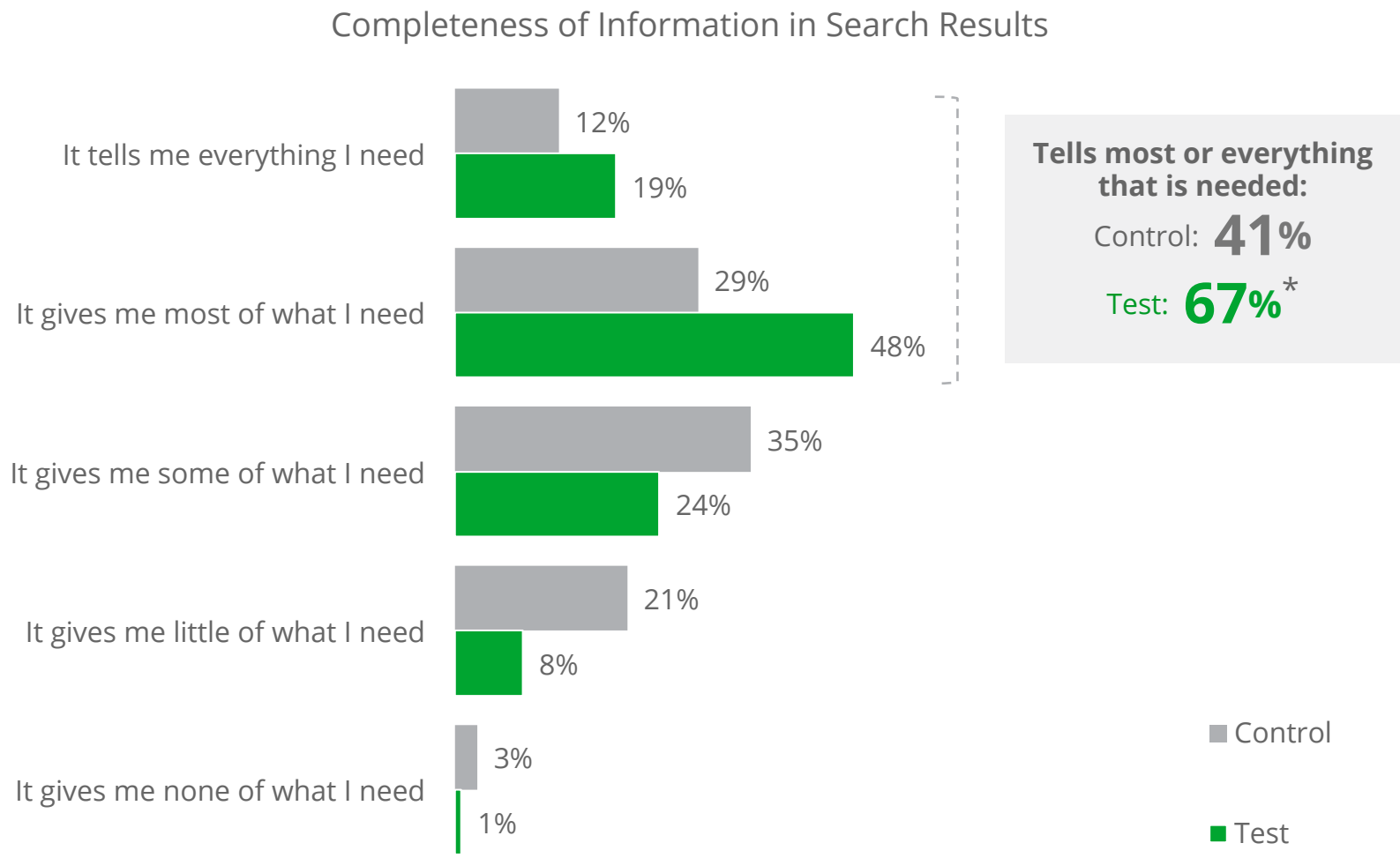
Base: Saw Listing (Control=494, Test=496)
Q. And, if you were in Sacramento, California, looking to purchase [CATEGORY], which of the following would you be likely to do after seeing the search results? Please select all that apply.
**indicates significant difference at the 95% confidence level*

Photos and reviews stand out for consumers viewing complete listings, with business hour information also noticed by most



Base: Saw Listing (Control=494, Test=496)
Q. Do you recall seeing the following information about the business in the search results?
**indicates significant difference at the 95% confidence level*

Incomplete listings leave consumers feeling like they need more information in order to make a purchase decision



Tells most or everything that is needed:

Control: **41%**

Test: **67%***

Base: Saw Listing (Control=494, Test=496); Saw Listing (excl. outliers) (Control=490, Test=494)

Q. If you were visiting Sacramento, California, looking to purchase [INSERT CATEGORY TEXT], how much more time would you spend looking for information online after seeing the search results? Please enter the number of minutes or indicate no more time.

Q. How well do these search results provide information about the business to help you make a yes or no purchase decision?

**indicates significant difference at the 95% confidence level*

Incomplete listings leave consumers feeling like they need more information in order to make a purchase decision

Would continue looking for information online after seeing search results:

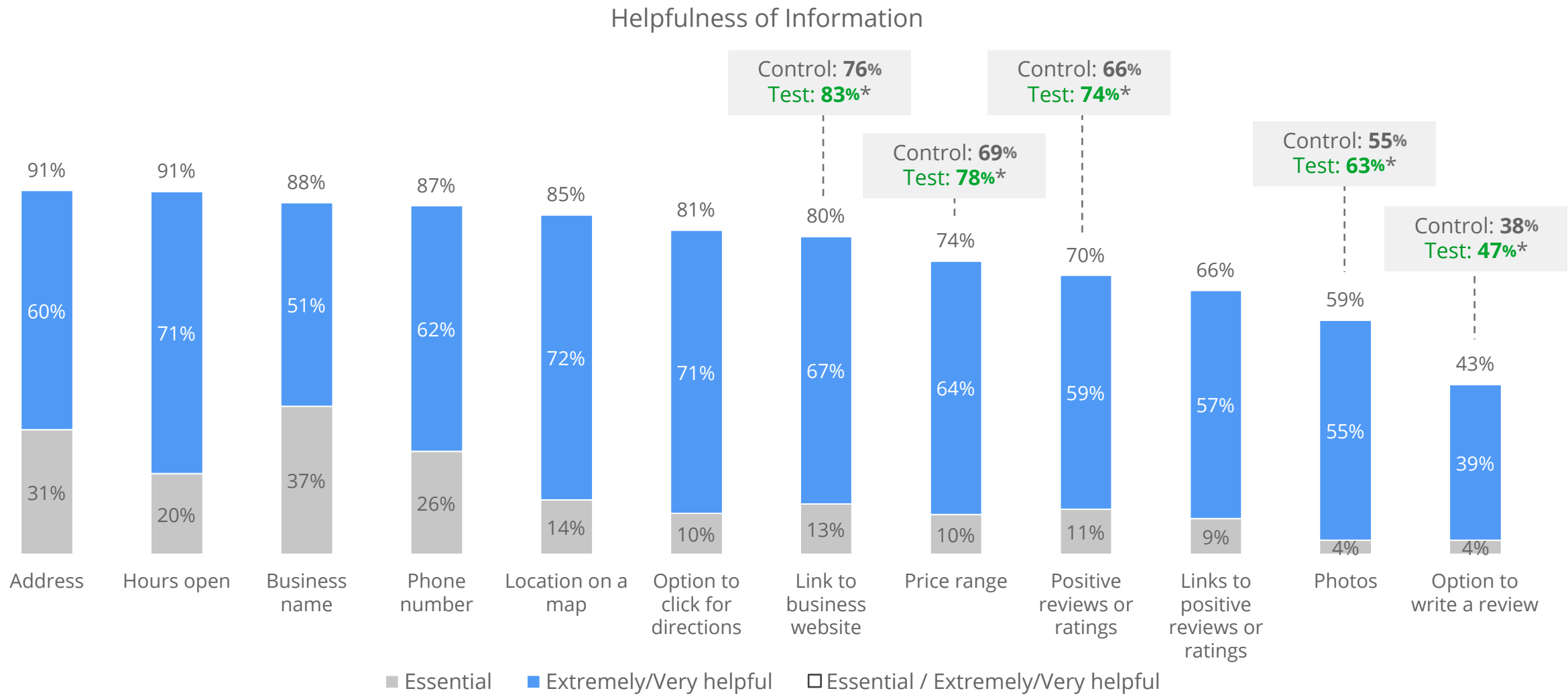
Control: **80%*** Test: **77%**

Mean time consumers would spend looking for more information:

Control: **13.7 min** Test: **13.0 min**

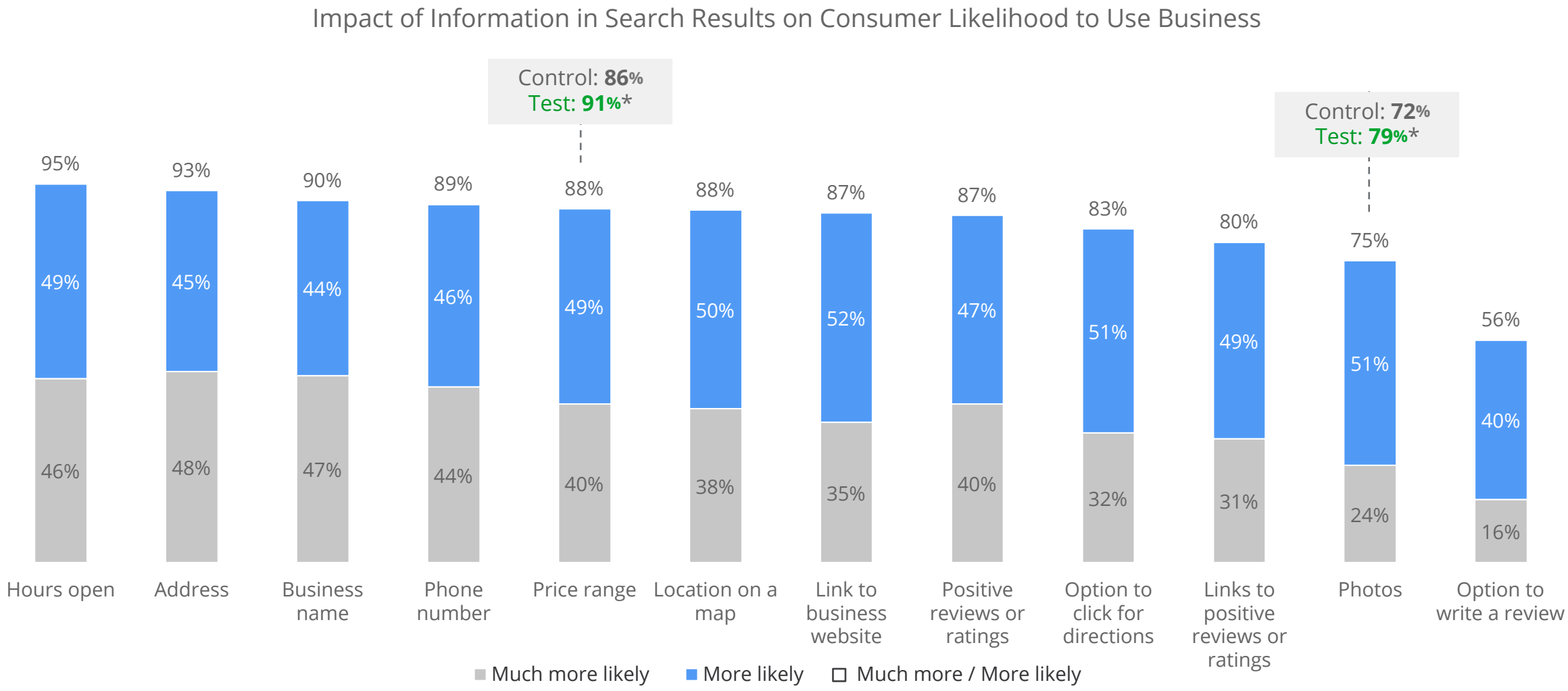
Base: Saw Listing (Control=494, Test=496); Saw Listing (excl. outliers) (Control=490, Test=494)
Q. If you were visiting Sacramento, California, looking to purchase [INSERT CATEGORY TEXT], how much more time would you spend looking for information online after seeing the search results? Please enter the number of minutes or indicate no more time.
Q. How well do these search results provide information about the business to help you make a yes or no purchase decision?
**indicates significant difference at the 95% confidence level*

Consumers would find most information contained in complete listings very helpful



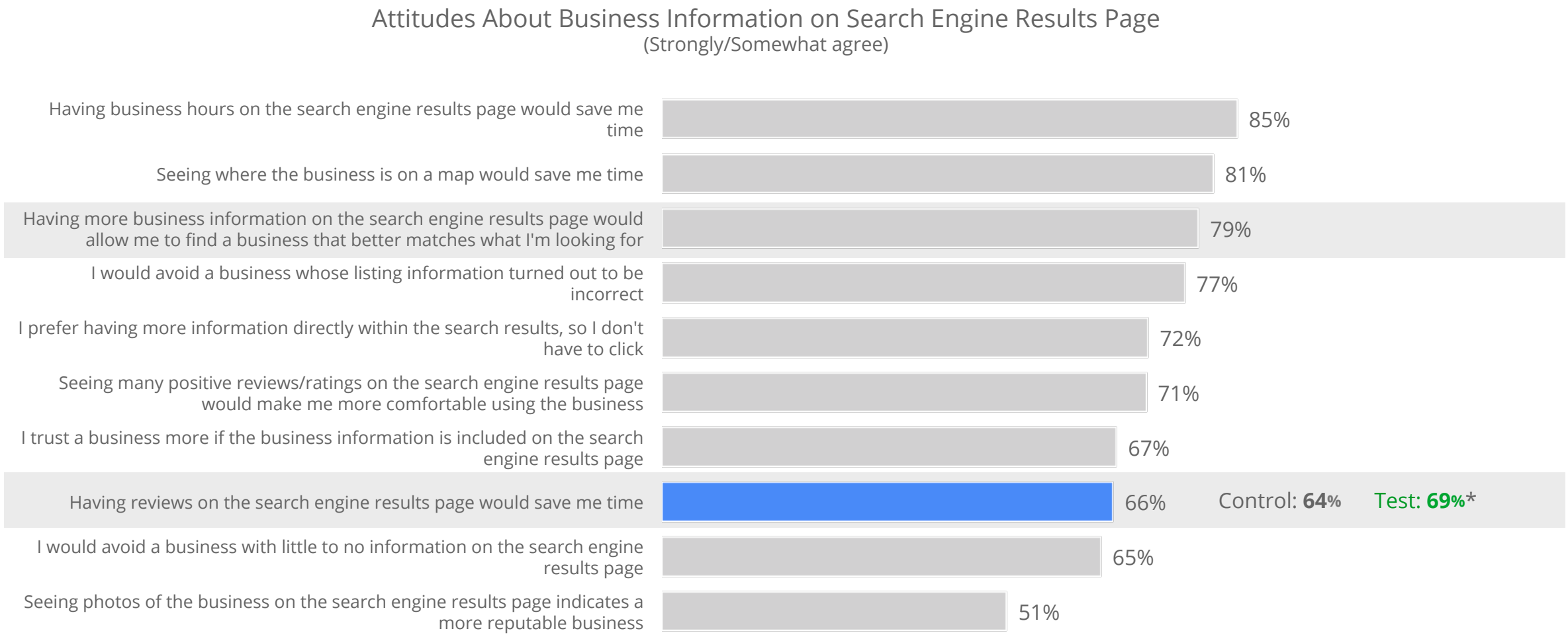
Base: Total Respondents (n=1000)
Q. Below are some of the types of information about a business that can be available on the search engine results page (thus minimizing the need for you to click through to another website). How helpful would each of the following be if they were included within your search engine results?
**indicates significant difference at the 95% confidence level*

Information found only in complete listings would have a positive impact on consumers' likelihood to use a business



Base: Total Respondents (n=1000)
Q. And, if you were searching for information about a business, how much more likely would you be to use a business that had each of the following types of information shown on the search engine results page?
**indicates significant difference at the 95% confidence level*

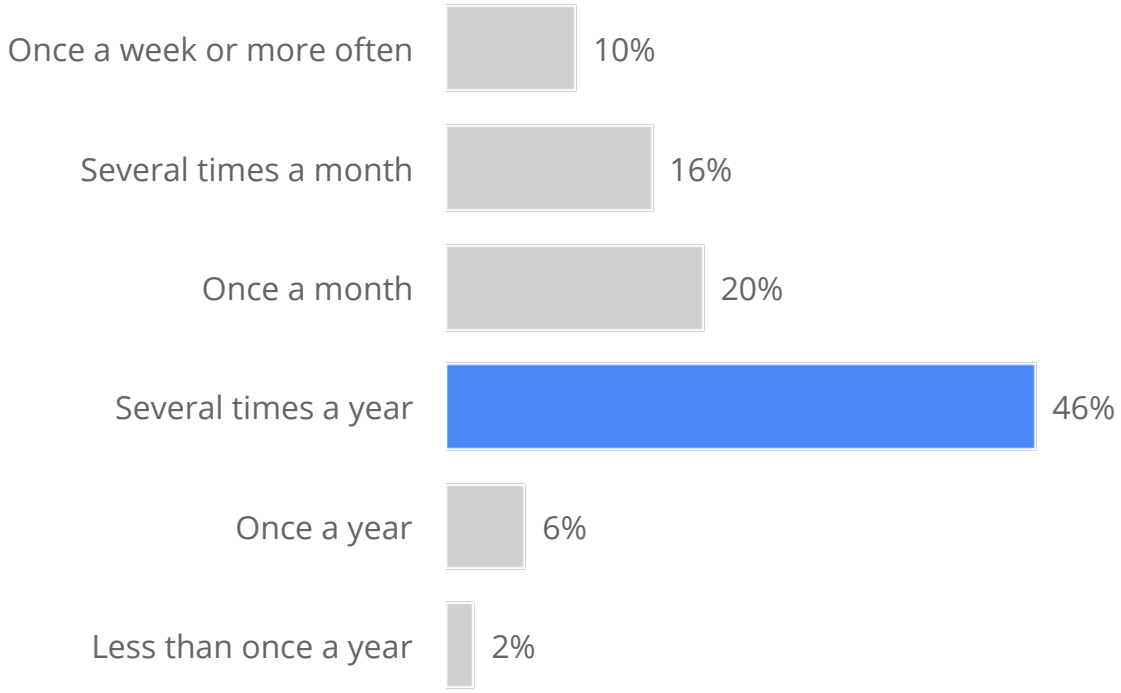
Complete listings within Search help consumers find better matches and save time

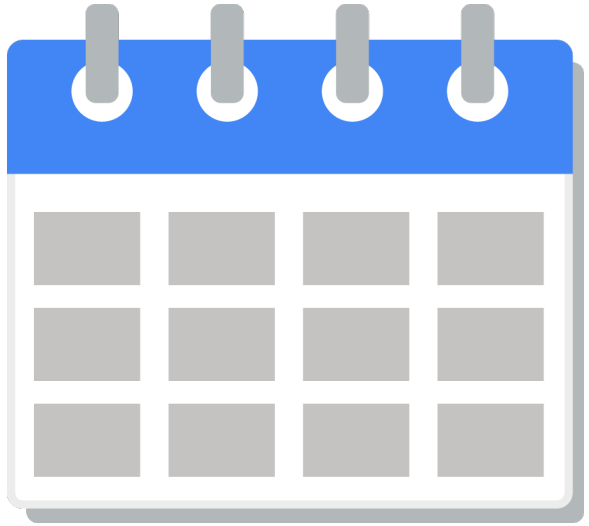


Base: Total Respondents (n=1000)
Q. How much do you agree or disagree with each of the following statements about the business information on a search engine results page?
**indicates significant difference at the 95% confidence level*

Appendix

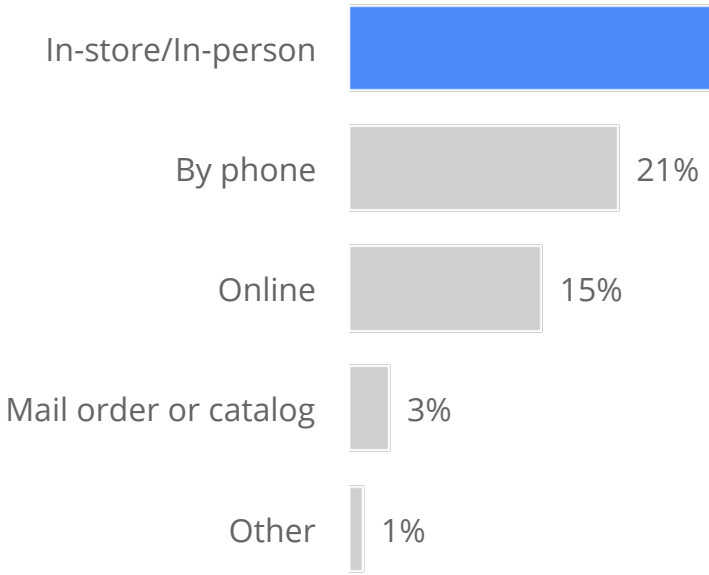
Frequency of Purchase





Base: Total Respondents (n=1000)
Q. How frequently do you purchase **[CATEGORY]**?

Method of Purchase

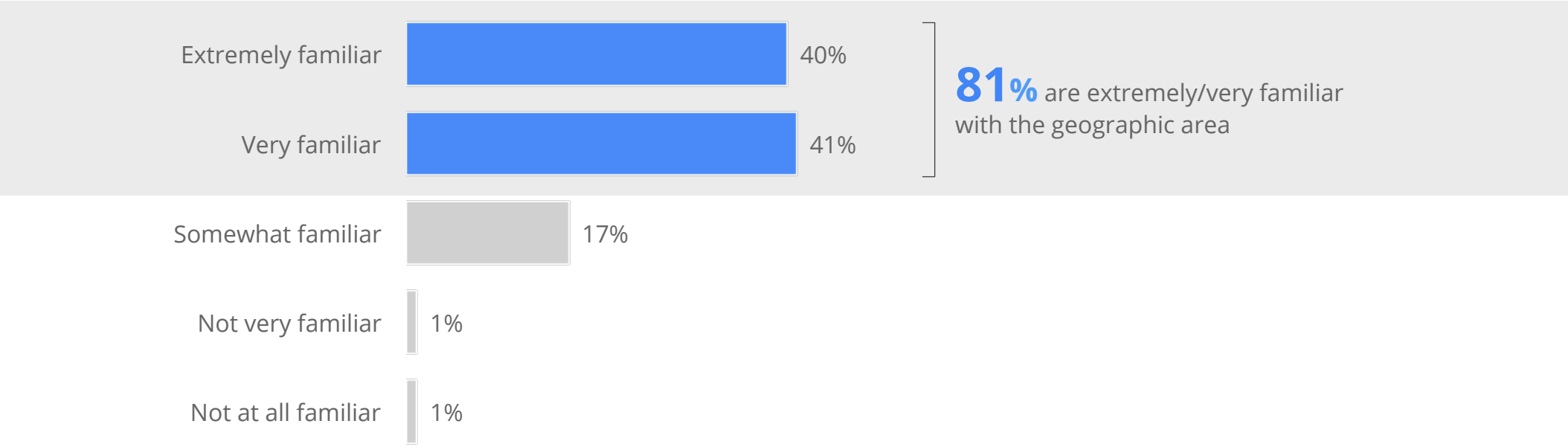


57%
purchase from local/small business

52%
purchase from large regional/national business

Base: Total Respondents (n=1000)
Q. How would you characterize the type of businesses/stores you purchased [CATEGORY] from? Please select all that apply.
Q. How did you make your purchases/orders or place your appointments for your [CATEGORY] in the past 6 months? Please select all that apply.

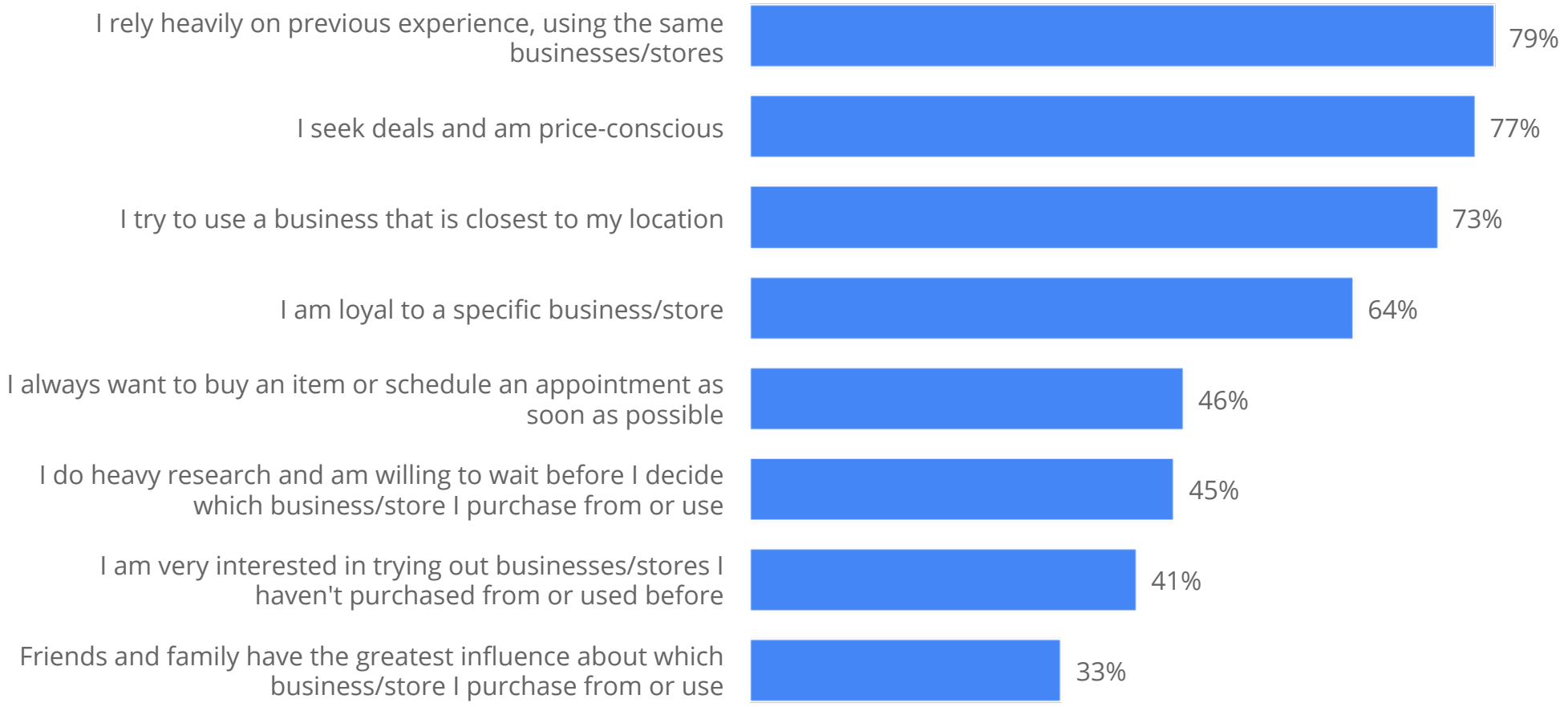
Familiarity with Geographic Area Where Looking to Make Purchase



Base: Used Search Engines To Gather Info (n=474)
Q. When you did any searches using search engines related to your purchases of [CATEGORY], typically how familiar were you with the geographic area where you were looking to make your purchase? Please select one response only.

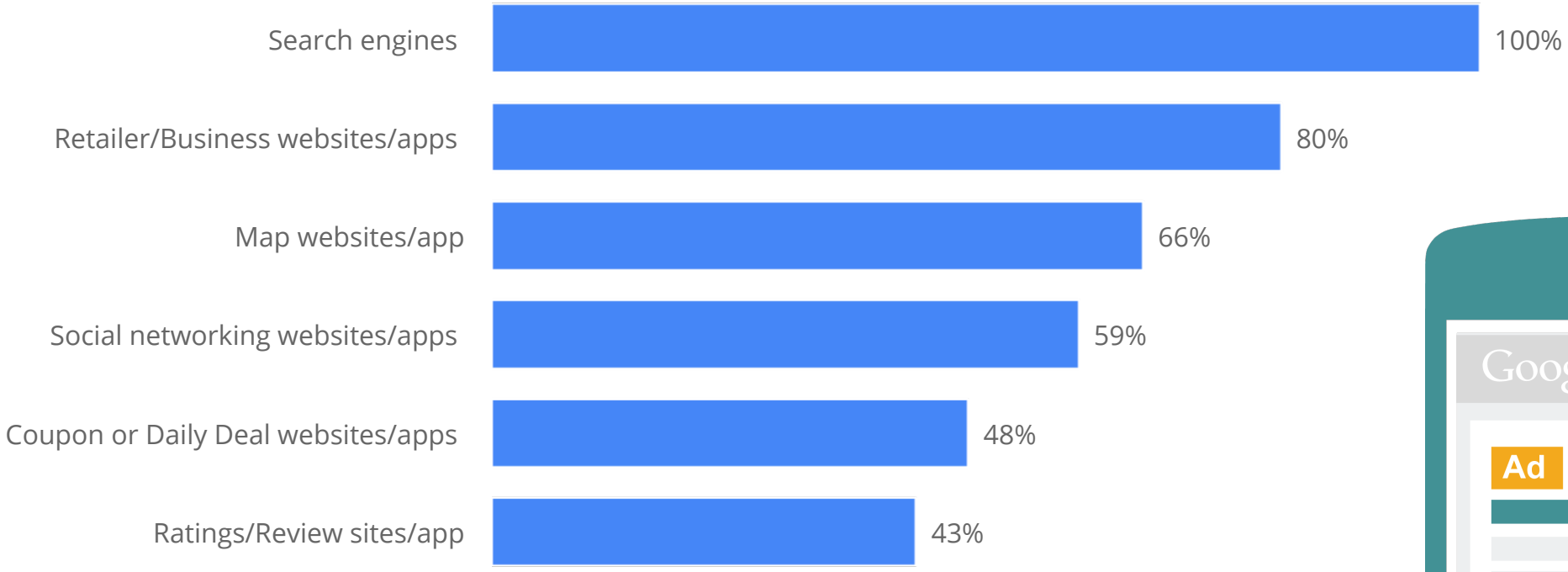
Shopping Attitudes

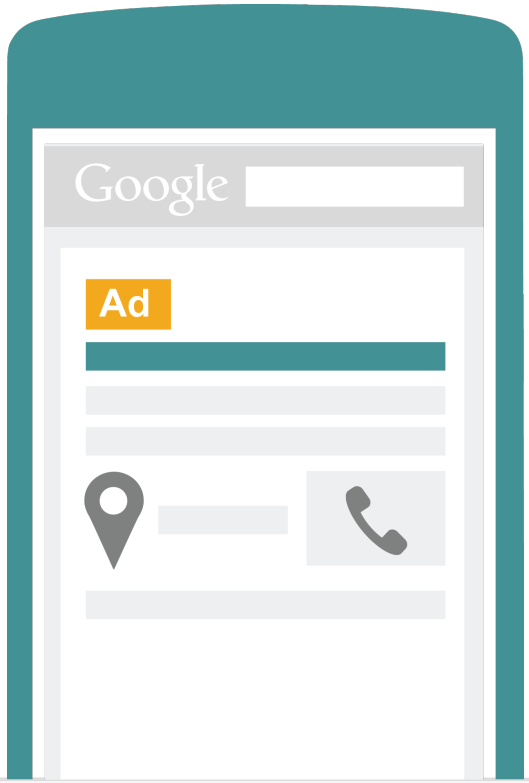
(Strongly/Somewhat agree)



Base: Total Respondents (n=1000)
Q. How much do you agree or disagree that each of the following describes how you purchase [CATEGORY]?
*Only asked if bakery, flower or hardware quotas. **Only asked if mechanic or salon quotas.

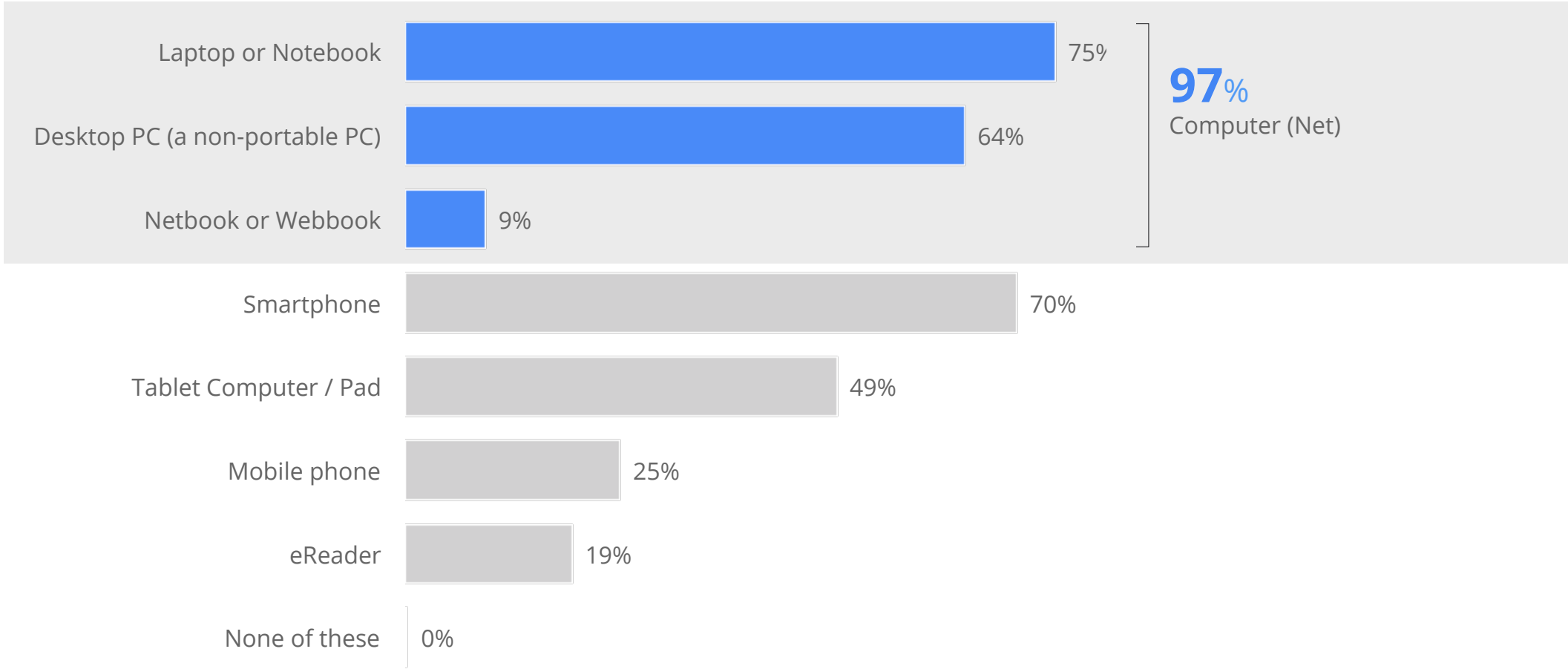
Websites/Apps Used to Gather Information for Any Purchases





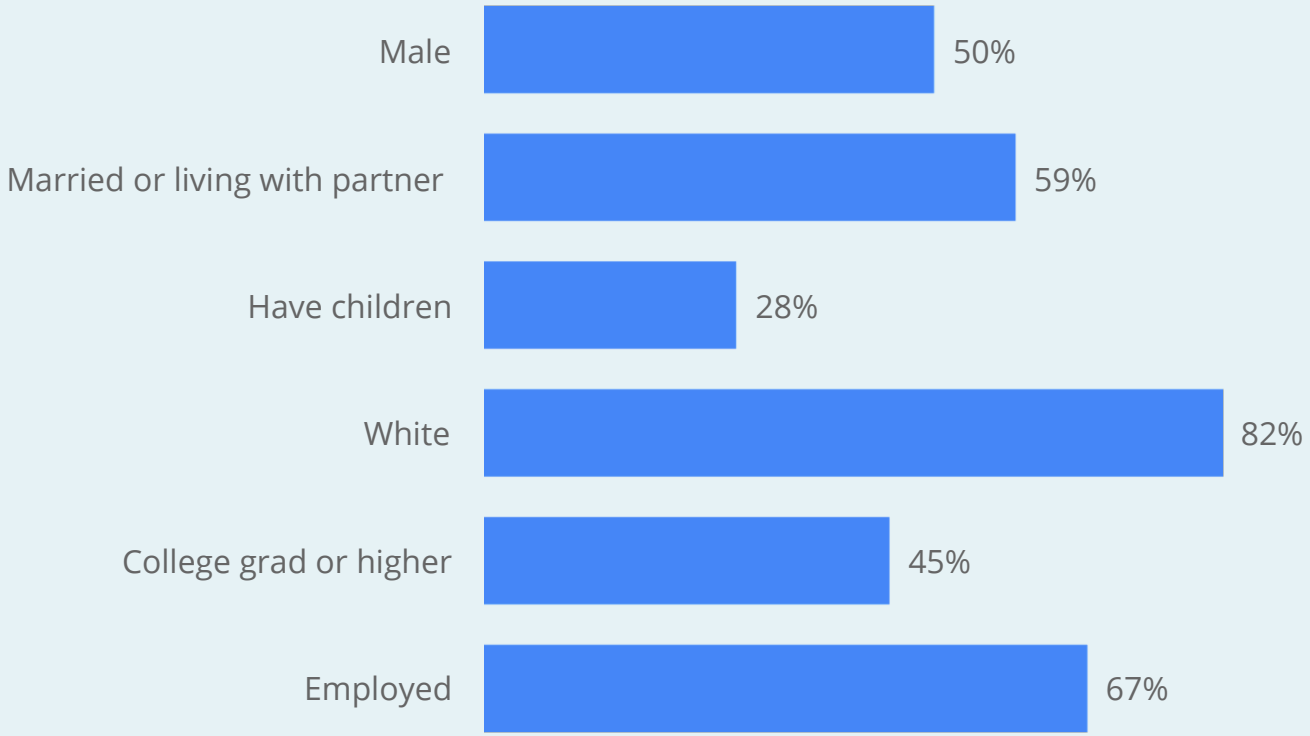
Base: Total Respondents (n=1000)
S2. Did you use the following websites or applications ('apps') in the past 6 months to gather information before any purchases? Please think about any information gathering you did about products, services, brands or businesses/stores.

Devices Used



Base: Total Respondents (n=1000)
S1. Which, if any, of the following devices do you use?

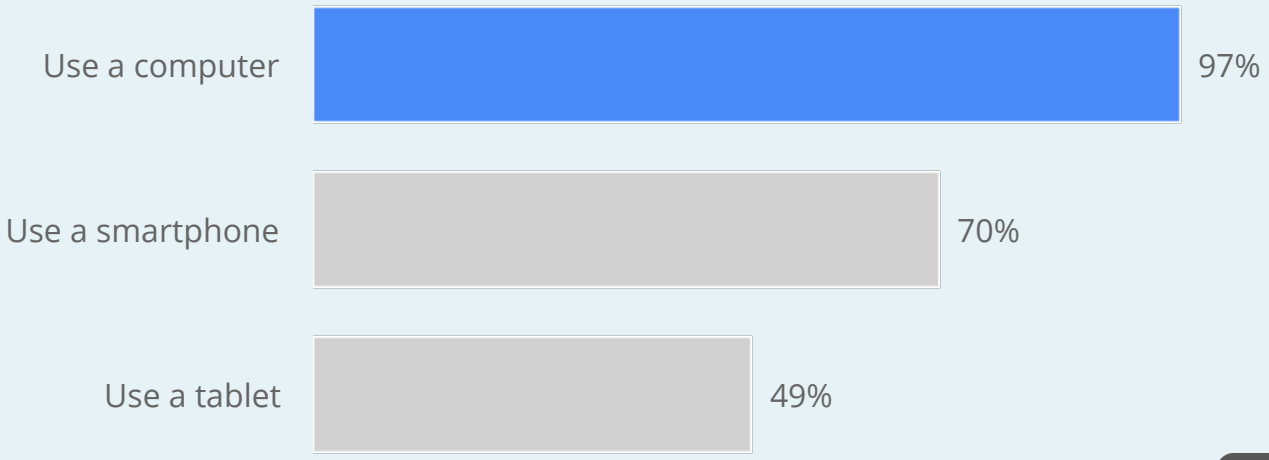
Consumer Profile: Demographics



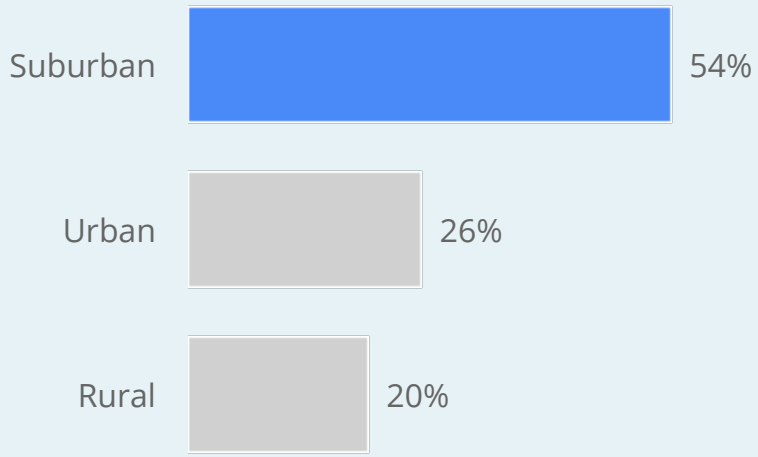
42 Median Age

$50K Median HHI

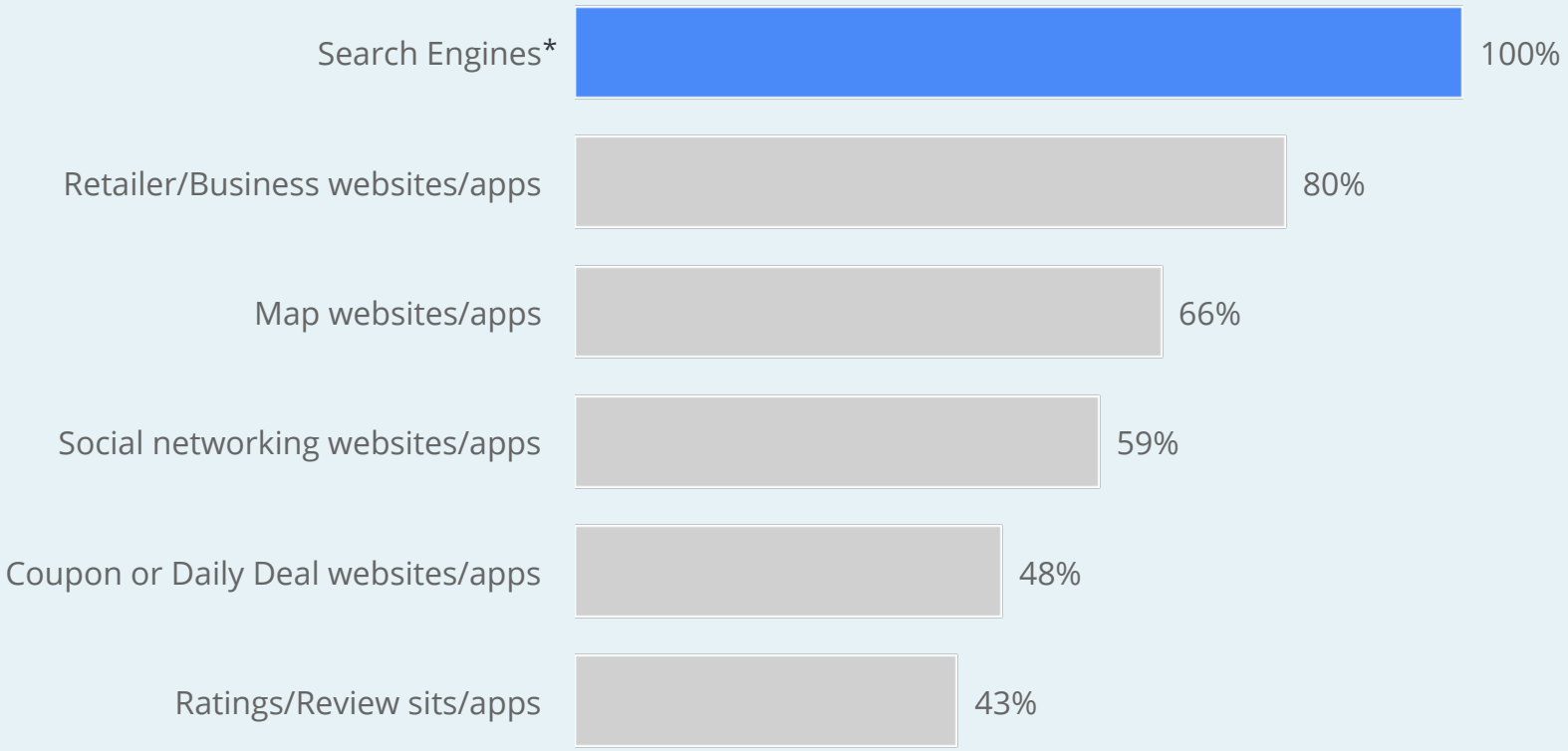
Consumer Profile: Device Usage

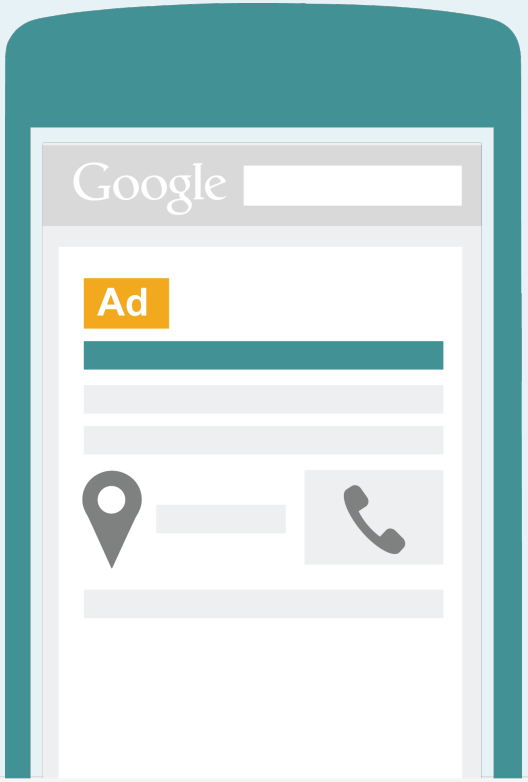


Consumer Profile: Location



Consumer Profile: Website/App Usage For Purchases in Past 6 Months





*Note: Respondents had to have used search engines in the past 6 months to gather information before any purchases to qualify for the survey.

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