Impact of Search Listings for Local Businesses
August 2014
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

- Screening Questions
- Path to Purchase Questions
- Exposure to Business Listing
  - Control
  - Test
- Questions about Business Featured in Business Listing
- Questions about Information Included in Business Listings
Convenient hours and location play an important role in the decision to buy locally

**Importance of Factors in Selection of Business** (Extremely or Very important)

- Price: 75%
- Was open convenient hours / Had convenient appointments available: 72%
- Convenient to your current or future location: 66%
- Sells/Offer a particular type of product or service: 59%
- Had a specific brand or product in stock: 57%
- Had positive reviews: 55%
- Specific person was available to provide the service: 46%
- Was near other businesses/stores you visit: 38%
- Was recommended by friends, family or colleagues: 38%
- Information about the business/store was available online: 38%
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.

Sources of Information

Gathered information before purchasing (Net): 80%

- Internet: 51%
- Family, friends or colleagues offline: 44%
- Family, friends or colleagues online: 16%
- Salespeople or other business/store personnel: 17%
- TV: 16%
- Email or direct mail offers: 16%
- Magazines/Newspapers: 15%
- Brochures or catalogues: 10%
- Radio: 8%
- Books: 5%
- Other: 4%

Online (net): 56%

Family, friends, or colleagues (net): 50%
Consumers turn to search engines to gather information for local purchases

Online Sources of Information

- Search engines: 84%
- Retailer/Business websites/apps: 55%
- Map websites/apps: 33%
- Social networking websites/apps: 33%
- Ratings/Review sites/apps: 28%
- Coupon or Daily Deal websites/apps: 23%
Consumers rely heavily on search engines early on while gathering information

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

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

<table>
<thead>
<tr>
<th>Information Sought on Search Engines</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours of a business/store</td>
<td>52%</td>
</tr>
<tr>
<td>Pricing or price range at a business/store</td>
<td>51%</td>
</tr>
<tr>
<td>Basic product feature or service description information</td>
<td>46%</td>
</tr>
<tr>
<td>Availability of item in a local store</td>
<td>46%</td>
</tr>
<tr>
<td>Reviews (of other shoppers professionals)</td>
<td>45%</td>
</tr>
<tr>
<td>Promotions or discounts</td>
<td>45%</td>
</tr>
<tr>
<td>Address of a business/store</td>
<td>38%</td>
</tr>
<tr>
<td>Phone number of a business/store</td>
<td>36%</td>
</tr>
<tr>
<td>Scheduling an appointment</td>
<td>36%</td>
</tr>
<tr>
<td>Pricing or price range (excluding those at a specific business/store)</td>
<td>35%</td>
</tr>
<tr>
<td>Product/Service comparisons</td>
<td>32%</td>
</tr>
<tr>
<td>Business/Store directions or location on a map</td>
<td>31%</td>
</tr>
<tr>
<td>Businesses/Stores offering a particular product or service</td>
<td>25%</td>
</tr>
<tr>
<td>Ordering or delivery information</td>
<td>23%</td>
</tr>
<tr>
<td>Photos of business/store</td>
<td>15%</td>
</tr>
<tr>
<td>Other information</td>
<td>4%</td>
</tr>
</tbody>
</table>
Consumers say that search engines help them save time and make decisions

Ways Search Engines Helped

- Saved me time: 60%
- Provided information to help me decide: 51%
- Helped me learn more about a product/service: 38%
- Prompted me to visit a business/store in person: 38%
- Helped me make a better choice of business/store: 37%
- Helped me learn more about a business/store: 34%
- Prompted me to look for more information: 31%
- Prompted me to visit a business/store online: 30%
- Prompted me to make a purchase/appointment: 24%
- Introduced me to a business/store I didn't know about: 23%
- Introduced me to a product/service I didn't know about: 19%
- Prompted me to ask family, friends or colleagues about a business: 14%
- Other: 3%

99.6% of those who used search engines to gather information say search engines helped them.
2 in 3 consumers looked for local business information on map sites/apps

**Information Sought on Map Sites/Apps**

- Local business/store hours: 49%
- Local business/store phone number: 35%
- Local business/store interior or exterior photos: 21%
- Exact location of a specific business/store: 59%
- Directions or distance to a specific business/store: 59%
- Travel time to a specific business/store: 39%
- Businesses/Stores near a particular location: 33%
- Businesses/Stores offering a particular product or service: 32%
- Other information: 3%

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?
### Ways Map Sites/Apps Helped

<table>
<thead>
<tr>
<th>Way</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saved me time</td>
<td>70%</td>
</tr>
<tr>
<td>Prompted me to visit a business/store in person</td>
<td>41%</td>
</tr>
<tr>
<td>Provided information to help me decide</td>
<td>32%</td>
</tr>
<tr>
<td>Helped me make a better choice of business/store</td>
<td>30%</td>
</tr>
<tr>
<td>Helped me learn more about a business/store</td>
<td>27%</td>
</tr>
<tr>
<td>Introduced me to a business/store I didn't know about</td>
<td>23%</td>
</tr>
<tr>
<td>Prompted me to visit a business/store online</td>
<td>23%</td>
</tr>
<tr>
<td>Prompted me to ask family, friends or colleagues about a business/store</td>
<td>22%</td>
</tr>
<tr>
<td>Prompted me to make a purchase/appointment</td>
<td>21%</td>
</tr>
<tr>
<td>Prompted me to look for more information</td>
<td>19%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
</tr>
</tbody>
</table>

97% of those who used maps to gather information say maps helped them.
Exposure to Business Listing

Control

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 **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

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

### Words/Phrases That Describe Featured Business

- Relevant to my search: 51% (Control), 49% (Test)
- Worth reading more information about: 28% (Control), 43%* (Test)
- Well-liked: 8% (Control), 41%* (Test)
- Current: 17% (Control), 34%* (Test)
- Has what I need: 20% (Control), 29%* (Test)
- Reliable: 14% (Control), 29%* (Test)
- Convenient: 12% (Control), 21%* (Test)
- A place for someone like me: 10%* (Control), 6% (Test)
- Old-fashioned: 6% (Control), 7%* (Test)
- Inexperienced: 2% (Control), 10%* (Test)
- None of these: 6% (Control), 6% (Test)

Base: Saw Listing (Control=494, Test=496)
Consumers are more likely to trust businesses with complete listings

**Attitudes About Featured Business**
(Strongly/Somewhat agree)

- **Is a reputable business**: 36% (Total Control) vs. 69% (Total Test)*
- **Is well-established**: 38% vs. 68%* (Total Test)
- **Is interested in new customers**: 49% vs. 67%* (Total Test)
- **Knows what it's doing**: 35% vs. 67%* (Total Test)
- **Offers quality products or services**: 32% vs. 66%* (Total Test)
- **Is a business I would visit**: 44% vs. 61%* (Total Test)
- **Cares about its customers**: 31% vs. 61%* (Total Test)
- **Offers the latest products or services**: 27% vs. 59%* (Total Test)
- **Is a place I can depend on**: 28% vs. 54%* (Total Test)

*indicates significant difference at the 95% confidence level

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

Likely Actions After Seeing Search Results

- Click through to visit the business's website: Control 49%, Test 50%
- Visit the business: Control 31%, Test 40%*
- Click to get driving directions: Control 36%, Test 38%
- Consider purchasing from this business: Control 28%, Test 37%*
- Search for more information about this business: Control 35%, Test 40%*
- Call the business: Control 30%, Test 27%
- Ask locals about this business: Control 21%, Test 20%
- Email the business: Control 5%, Test 6%
- None of these: Control 8%, Test 5%

*indicates significant difference at the 95% confidence level

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.

Information Recalled from Search Results

<table>
<thead>
<tr>
<th>Business name</th>
<th>Address</th>
<th>Location on a map</th>
<th>Phone number</th>
<th>Photos</th>
<th>Reviews or ratings</th>
<th>Links to reviews or ratings</th>
<th>Hours open</th>
<th>Option to click for directions</th>
<th>Option to write a review</th>
<th>Email address</th>
<th>Owner's name</th>
<th>Price range</th>
<th>Years in business</th>
</tr>
</thead>
<tbody>
<tr>
<td>91%</td>
<td>93%</td>
<td>92%</td>
<td>87%</td>
<td>90%</td>
<td>83%</td>
<td>82%</td>
<td>84%</td>
<td>83%</td>
<td>69%</td>
<td>68%</td>
<td>55%</td>
<td>55%</td>
<td>27%</td>
</tr>
</tbody>
</table>

Control     | Test     | Control           | Test         | Control         | Test         | Control                  | Test        | Control                 | Test                  | Control     | Test         | Control     | Test             |

*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

Completeness of Information in Search Results

- **It tells me everything I need**
  - Control: 12%
  - Test: 19%

- **It gives me most of what I need**
  - Control: 29%
  - Test: 48%

- **It gives me some of what I need**
  - Control: 35%
  - Test: 24%

- **It gives me little of what I need**
  - Control: 21%
  - Test: 8%

- **It gives me none of what I need**
  - Control: 3%
  - Test: 1%

**Tells most or everything that is needed:**
- Control: 41%
- Test: 67%*

*indicates significant difference at the 95% confidence level

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?

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

<table>
<thead>
<tr>
<th></th>
<th>Control</th>
<th>Test</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>80% *</td>
<td>77%</td>
</tr>
</tbody>
</table>

Mean time consumers would spend looking for more information:

<table>
<thead>
<tr>
<th></th>
<th>Control</th>
<th>Test</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>13.7 min</td>
<td>13.0 min</td>
</tr>
</tbody>
</table>
Consumers would find most information contained in complete listings very helpful

Helpfulness of Information

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

*Essential
**Extremely/Very helpful
□Essential / Extremely/Very helpful

<table>
<thead>
<tr>
<th>Information</th>
<th>Control</th>
<th>Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>91%</td>
<td>91%</td>
</tr>
<tr>
<td>Hours open</td>
<td>60%</td>
<td>71%</td>
</tr>
<tr>
<td>Business name</td>
<td>31%</td>
<td>20%</td>
</tr>
<tr>
<td>Phone number</td>
<td>88%</td>
<td>87%</td>
</tr>
<tr>
<td>Location on a map</td>
<td>51%</td>
<td>85%</td>
</tr>
<tr>
<td>Option to click for directions</td>
<td>26%</td>
<td>81%</td>
</tr>
<tr>
<td>Link to business website</td>
<td>72%</td>
<td>80%</td>
</tr>
<tr>
<td>Price range</td>
<td>71%</td>
<td>74%</td>
</tr>
<tr>
<td>Positive reviews or ratings</td>
<td>72%</td>
<td>70%</td>
</tr>
<tr>
<td>Links to positive reviews or ratings</td>
<td>66%</td>
<td>66%</td>
</tr>
<tr>
<td>Photos</td>
<td>60%</td>
<td>59%</td>
</tr>
<tr>
<td>Option to write a review</td>
<td>31%</td>
<td>20%</td>
</tr>
</tbody>
</table>
Information found only in complete listings would have a positive impact on consumers’ likelihood to use a business

Impact of Information in Search Results on Consumer Likelihood to Use Business

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

Base: Total Respondents (n=1000)

<table>
<thead>
<tr>
<th>Information Type</th>
<th>Control: 86%</th>
<th>Test: 91%*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours open</td>
<td>95%</td>
<td>93%</td>
</tr>
<tr>
<td>Address</td>
<td>49%</td>
<td>45%</td>
</tr>
<tr>
<td>Business name</td>
<td>90%</td>
<td>44%</td>
</tr>
<tr>
<td>Phone number</td>
<td>89%</td>
<td>46%</td>
</tr>
<tr>
<td>Price range</td>
<td>88%</td>
<td>49%</td>
</tr>
<tr>
<td>Location on a map</td>
<td>88%</td>
<td>50%</td>
</tr>
<tr>
<td>Link to business website</td>
<td>87%</td>
<td>52%</td>
</tr>
<tr>
<td>Positive reviews or ratings</td>
<td>87%</td>
<td>47%</td>
</tr>
<tr>
<td>Option to click for directions</td>
<td>83%</td>
<td>51%</td>
</tr>
<tr>
<td>Links to positive reviews or ratings</td>
<td>80%</td>
<td>49%</td>
</tr>
<tr>
<td>Photos</td>
<td>75%</td>
<td>51%</td>
</tr>
<tr>
<td>Option to write a review</td>
<td>56%</td>
<td>40%</td>
</tr>
</tbody>
</table>

Control: 72%
Test: 79%*
Complete listings within Search help consumers find better matches and save time

**Attitudes About Business Information on Search Engine Results Page**
(Strongly/Somewhat agree)

- Having business hours on the search engine results page would save me time: 85%
- Seeing where the business is on a map would save me time: 81%
- Having more business information on the search engine results page would allow me to find a business that better matches what I'm looking for: 79%
- I would avoid a business whose listing information turned out to be incorrect: 77%
- I prefer having more information directly within the search results, so I don't have to click: 72%
- Seeing many positive reviews/ratings on the search engine results page would make me more comfortable using the business: 71%
- I trust a business more if the business information is included on the search engine results page: 67%
- Having reviews on the search engine results page would save me time: 66%
- I would avoid a business with little to no information on the search engine results page: 65%
- Seeing photos of the business on the search engine results page indicates a more reputable business: 51%

**Control:** 64%
**Test:** 69%*  
*Indicates significant difference at the 95% confidence level.
Appendix
**Frequency of Purchase**

- **Once a week or more often**: 10%
- **Several times a month**: 16%
- **Once a month**: 20%
- **Several times a year**: 46%
- **Once a year**: 6%
- **Less than once a year**: 2%

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

In-store/In-person: 81%
By phone: 21%
Online: 15%
Mail order or catalog: 3%
Other: 1%

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

- **Extremely familiar**: 40%
- **Very familiar**: 41%
- **Somewhat familiar**: 17%
- **Not very familiar**: 1%
- **Not at all familiar**: 1%

81% are extremely/very familiar with the geographic area.
Shopping Attitudes

(Strongly/Somewhat agree)

- I rely heavily on previous experience, using the same businesses/stores: 79%
- I seek deals and am price-conscious: 77%
- I try to use a business that is closest to my location: 73%
- I am loyal to a specific business/store: 64%
- I always want to buy an item or schedule an appointment as soon as possible: 46%
- I do heavy research and am willing to wait before I decide which business/store I purchase from or use: 45%
- I am very interested in trying out businesses/stores I haven't purchased from or used before: 41%
- Friends and family have the greatest influence about which business/store I purchase from or use: 33%
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.

- Search engines: 100%
- Retailer/Business websites/apps: 80%
- Map websites/app: 66%
- Social networking websites/apps: 59%
- Coupon or Daily Deal websites/apps: 48%
- Ratings/Review sites/app: 43%
Devices Used

- **Laptop or Notebook**: 75%
- **Desktop PC (a non-portable PC)**: 64%
- **Netbook or Webbook**: 9%
- **Smartphone**: 70%
- **Tablet Computer / Pad**: 49%
- **Mobile phone**: 25%
- **eReader**: 19%
- **None of these**: 0%

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

- Male: 50%
- Married or living with partner: 59%
- Have children: 28%
- White: 82%
- College grad or higher: 45%
- Employed: 67%

Median Age: 42
Median HHI: $50K
Consumer Profile: Device Usage

- Use a computer: 97%
- Use a smartphone: 70%
- Use a tablet: 49%
Consumer Profile: Location

- Suburban: 54%
- Urban: 26%
- Rural: 20%
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.