

Impact of Search Listings Google 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:

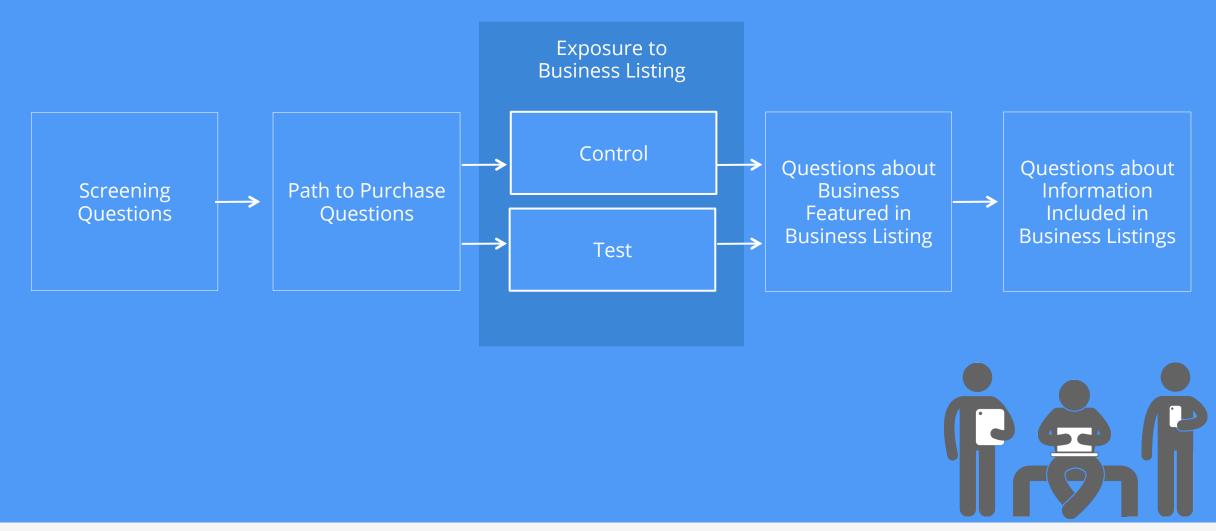
- Bakery
- Mechanic
- Salon / Barber shop
- Flower/Plant shop
- Hardware store

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.



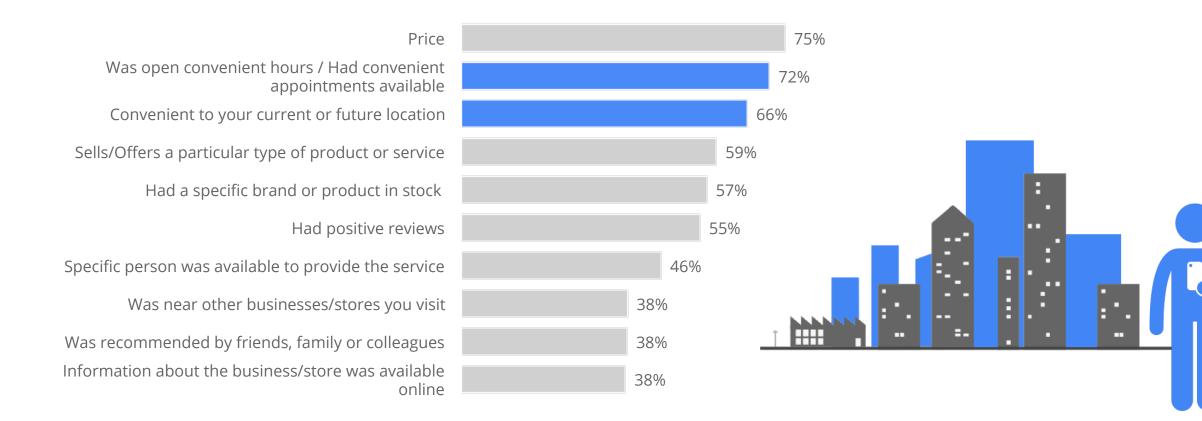
Research Design and Survey Flow





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)

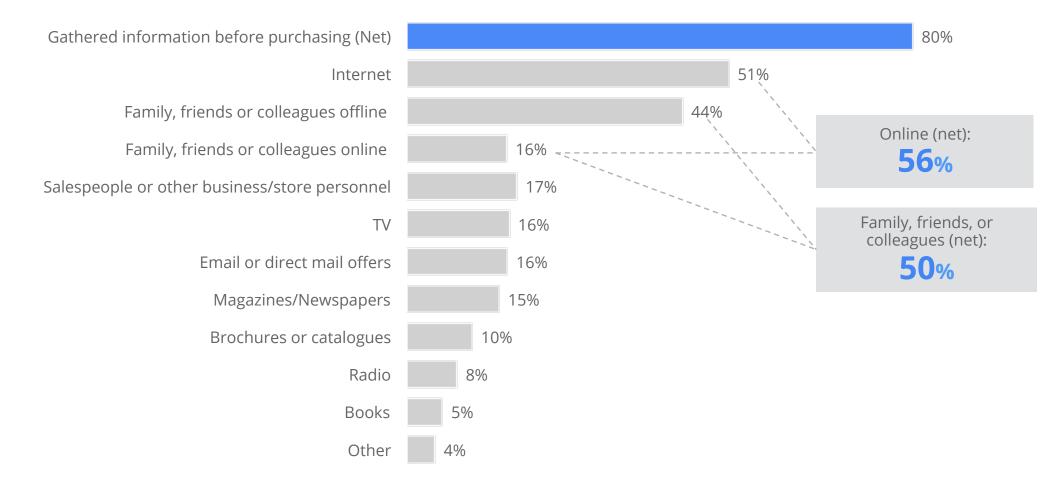




Q. How important were each of the following factors in selecting a business/store to purchase [CATEGORY] from in the past 6 months? Note: In stock factor was shown only if bakery, flower, or hardware quota and person availability was shown only if mechanic or salon quota

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, Google Confidential and Proprietary 5 services, brands or businesses/stores. Please select all that apply.

Consumers turn to search engines to gather information for local purchases

Search engines84%Retailer/Business websites/apps55%Map websites/apps33%Social networking websites/apps33%Ratings/Review sites/apps28%Coupon or Daily Deal websites/apps23%

Online Sources of Information



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%



Consumers seek out business hours via search engines

Information Sought on Search Engines

Hours of a business/store								52%
Pricing or price range at a business/store								51%
Basic product feature or service description information							46	%
Availability of item in a local store							46	%
Reviews (of other shoppers professionals)							45	%
Promotions or discounts							45%	6
Address of a business/store						38%		
Phone number of a business/store						36%		
Scheduling an appointment						36%		
Pricing or price range (excluding those at a specific business/store)						35%		
Product/Service comparisons		32%						
Business/Store directions or location on a map					31	%		
Businesses/Stores offering a particular product or service				25%	6			
Ordering or delivery information	Ordering or delivery information		23%	23%				
Photos of business/store			15%					
Other information		4%						

Ipsos

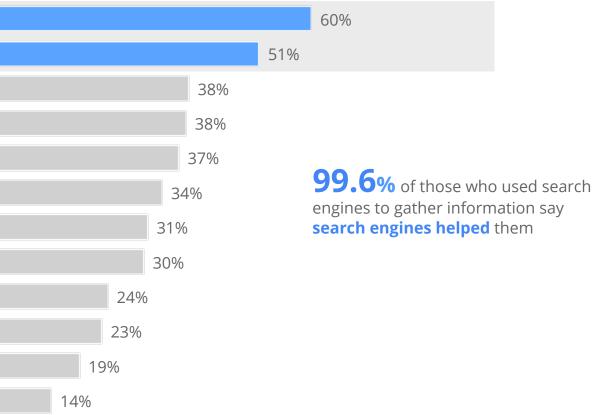
Base: Used Search Engines To Gather Info (n=474) Q. What type(s) of information related to your purchases of [CATEGORY] did you look for using search engines? This can include any information gathered about products, services, brands or businesses/stores. Please select all that apply. Note: Scheduling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

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

Ways Search Engines Helped

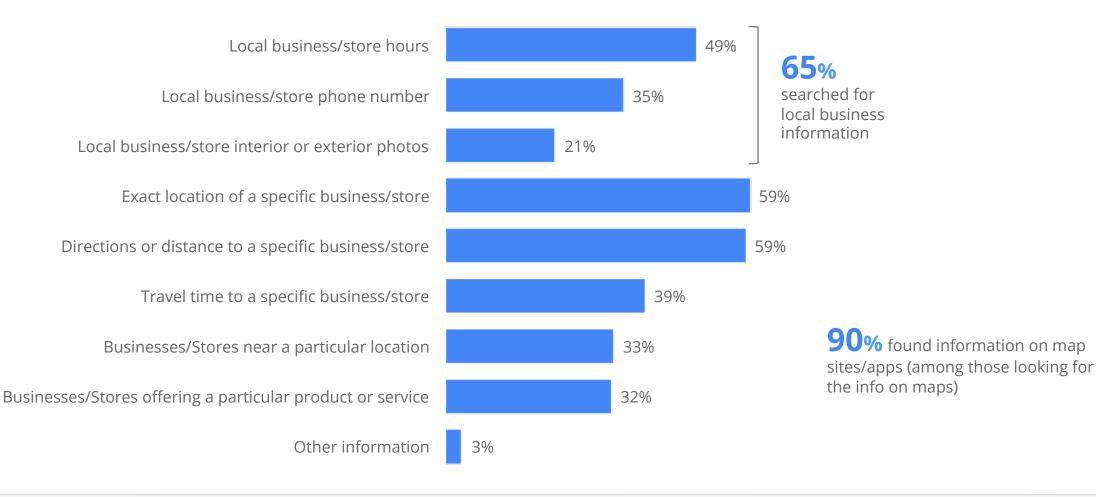
Saved me time Provided information to help me decide Helped me learn more about a product/service Prompted me to visit a business/store in person Helped me make a better choice of business/store Helped me learn more about a business/store Prompted me to look for more information Prompted me to visit a business/store online Prompted me to make a purchase/appointment Introduced me to a business/store I didn't know about Introduced me to a product/service I didn't know about Prompted me to ask family, friends or colleagues about a business/ 14% Other 3%



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

Information Sought on Map Sites/Apps



Base: Used Map Sites/Apps To Gather Info (n=186), Used Map Sites/Apps to Gather the Specific Info (floating base)

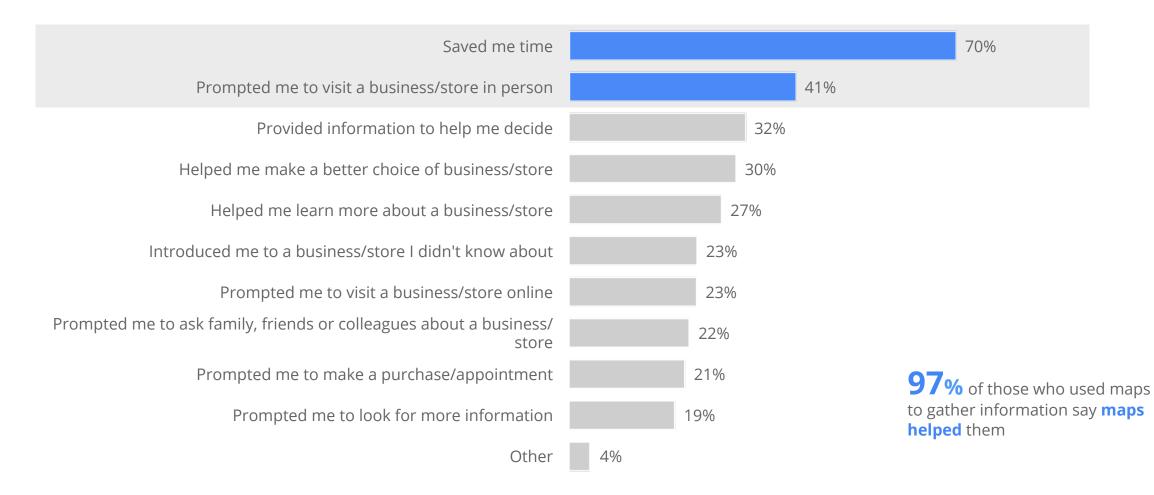
psos

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?

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

Ways Map Sites/Apps Helped





Exposure to Business Listing

S St 1820 29th St	BAKERY See photos
Honest Engine 51 Map data 82014 Google	Directions Write a rev Address: Phone: Hours: Menu:
	Reviews
	4.9 *****
Directions Write a review	"Dairy and Gluter
Address:	"They have so n free baked good
Phone:	"Delish! Such go 4 reviewers
	View all Google reviews
Reviews	People also searc
Be the first to review	
	Freeport Bakery & Bakery

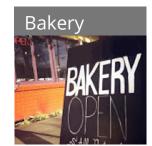
ata ©2014 Google Follow served, in success -Google reviews ree bakery in ." 4 reviewers varieties of DAILY FRESH BACKED gluten treats that you wont miss gluten at all!" for



Test

Feedback

Categories



Mechanic



Salon/Barber



Hardware



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-liked204% more likely to be viewed as offers qualityproducts 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

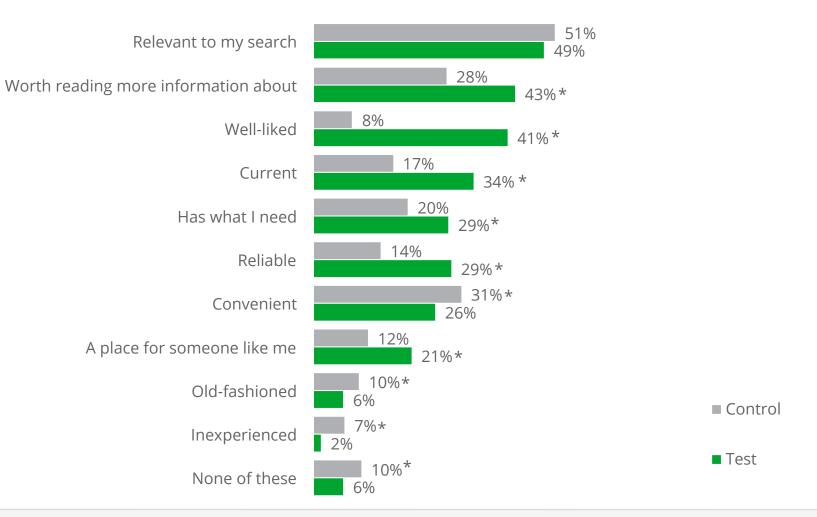
38% more likely to be viewed as a business I would visit29% more likely to motivate consumers to visit the business

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



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

Words/Phrases That Describe Featured Business

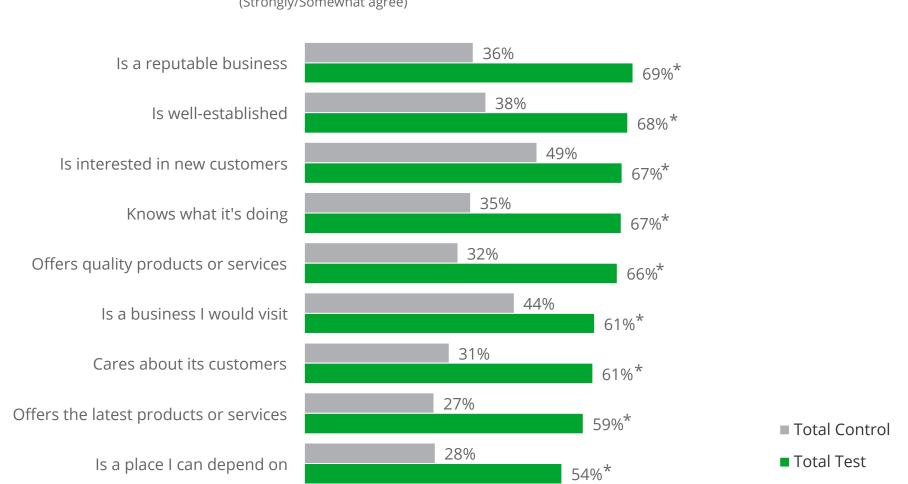


Base: Saw Listing (Control=494, Test=496)

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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



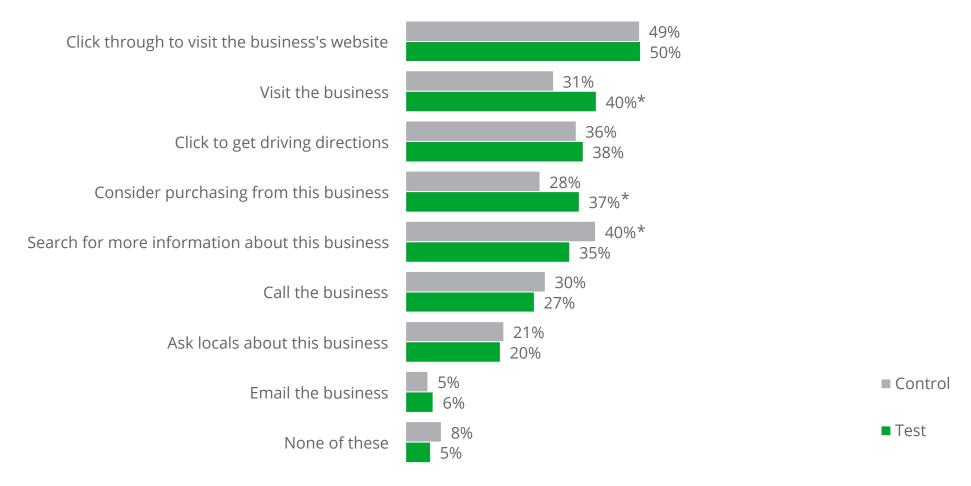
Attitudes About Featured Business (Strongly/Somewhat agree)



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*

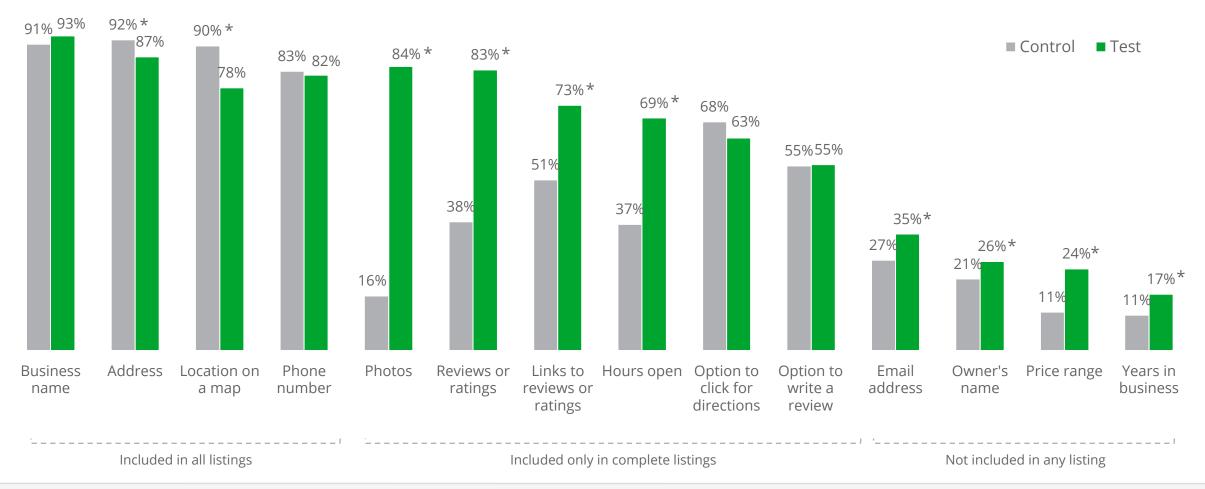
Consumers are significantly more likely to visit and consider purchasing from businesses with complete listings

Likely Actions After Seeing Search Results





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

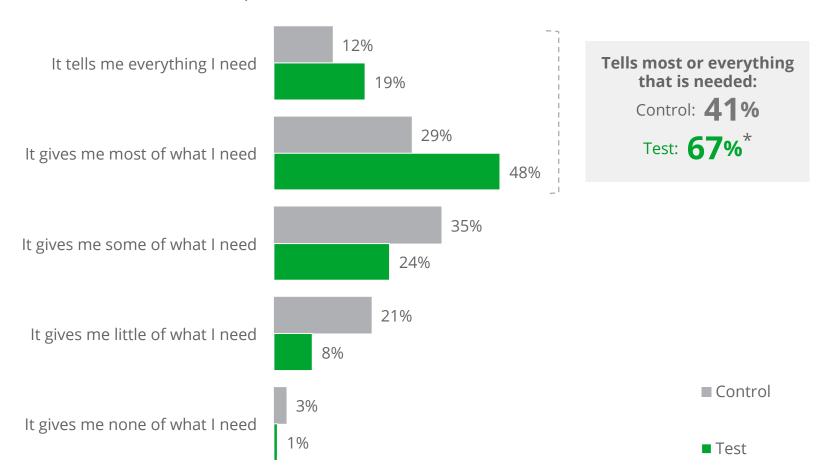


Information Recalled from Search Results



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



Completeness of Information in Search Results

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?

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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

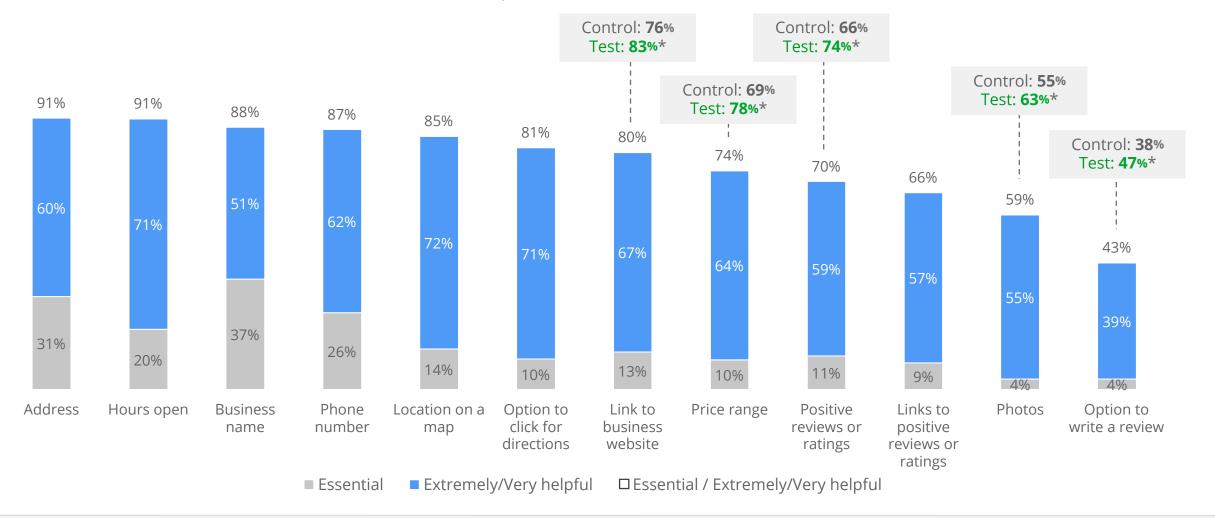


Base: Saw Listing (Control=494, Test=496); Saw Listing (excl. outliers) (Control=490, Test=494)

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



Helpfulness of Information

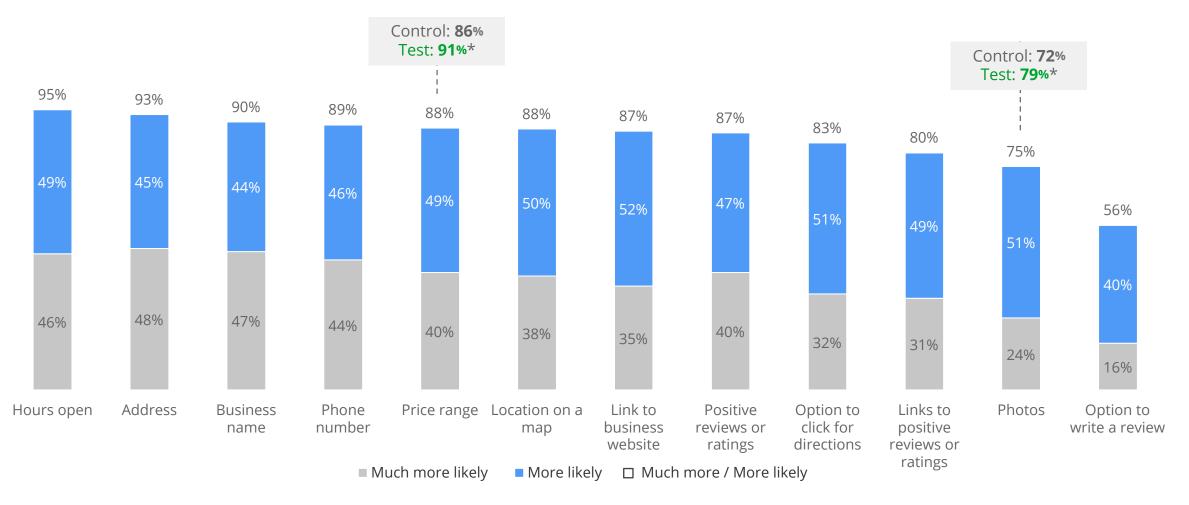
Base: Total Respondents (n=1000)

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*



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





Base: Total Respondents (n=1000)

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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

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

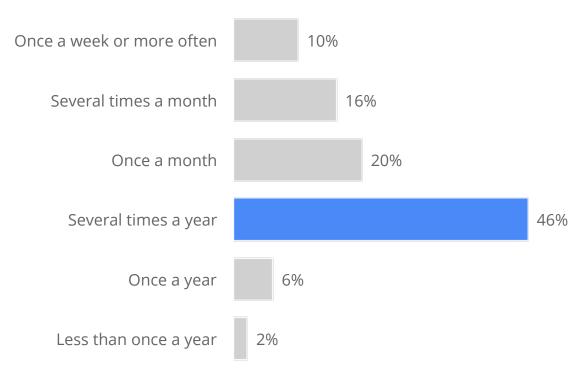
Having business hours on the search engine results page would save me time 85%
Seeing where the business is on a map would save me time 81%
Having more business information on the search engine results page would allow me to find a business that better matches what I'm looking for 79%
I would avoid a 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% Control: 64% Test: 69%*
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%



Appendix



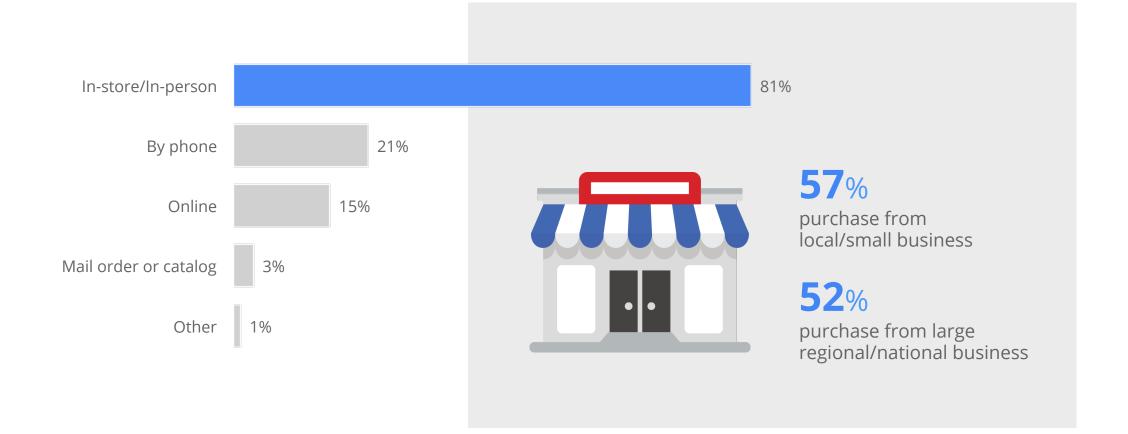
Frequency of Purchase







Method of Purchase

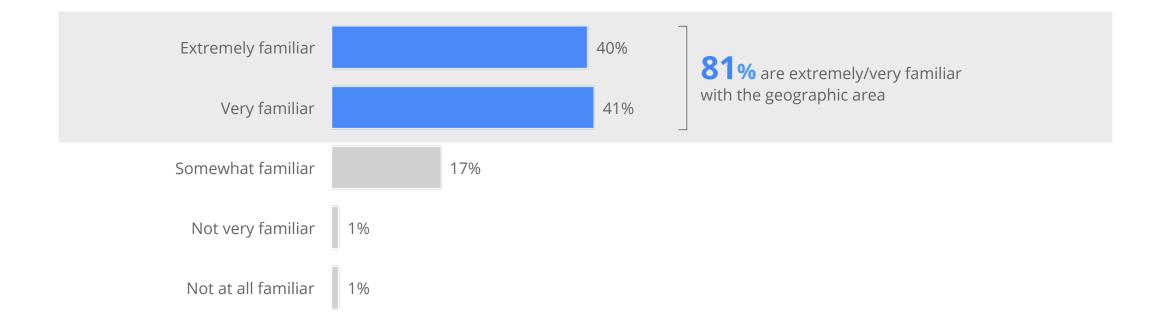




Base: Total Respondents (n=1000)

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

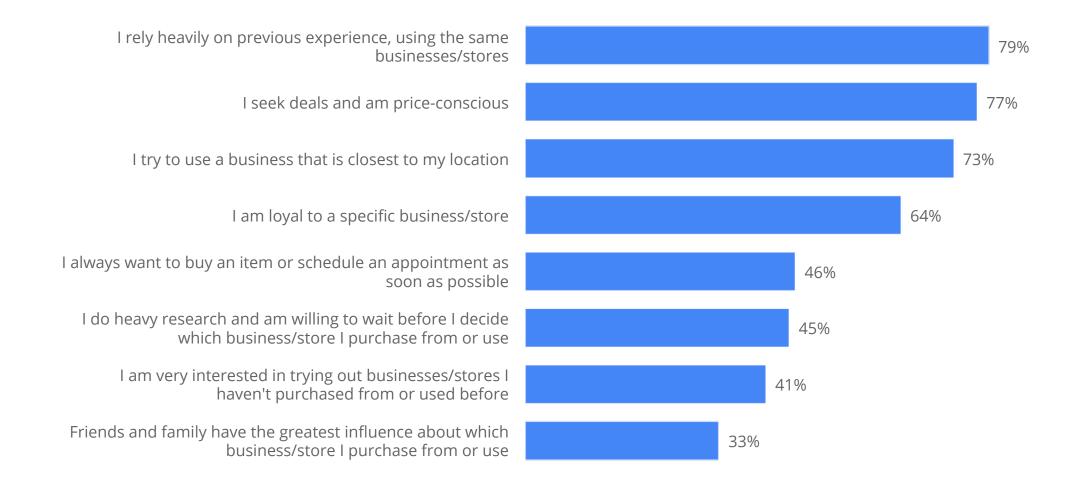




Shopping Attitudes

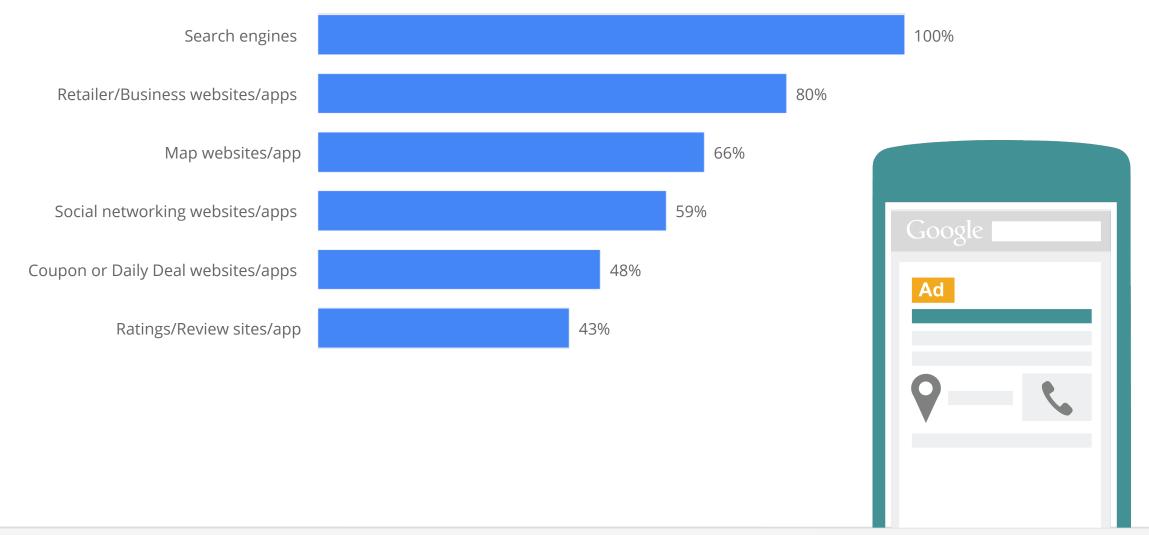
(Strongly/Somewhat agree)

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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

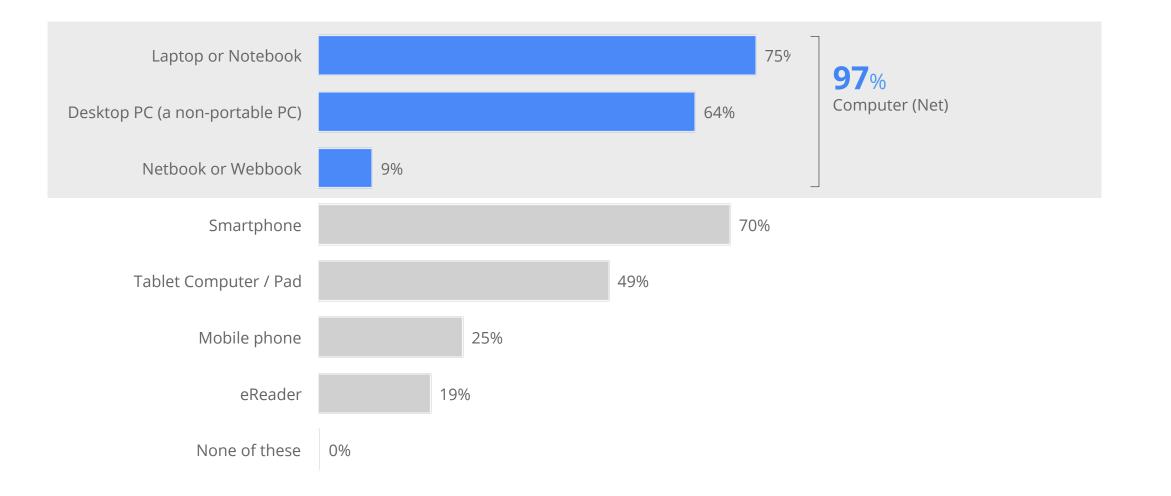


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Base: Total Respondents (n=1000)

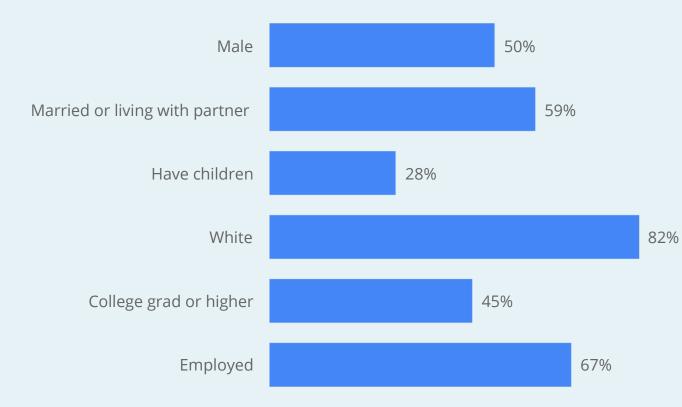
S2. Did you use the following websites or applications ('apps') in the past 6 months to gather information before any purchases? Please think about any information gathering you d**Google Confidential and Proprietary** 28 about products, services, brands or businesses/stores.

Devices Used





Consumer Profile: Demographics

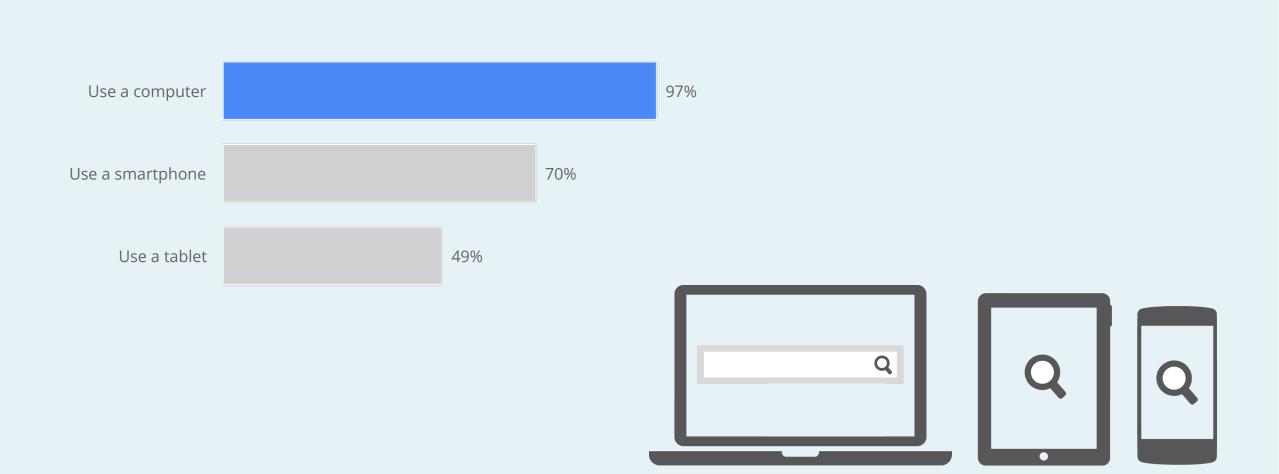




42 Median Age \$50K Median HHI

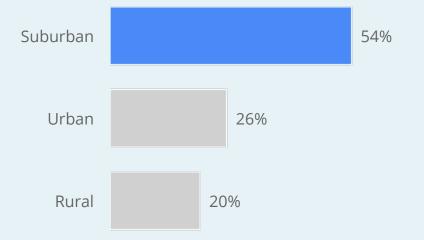


Consumer Profile: Device Usage





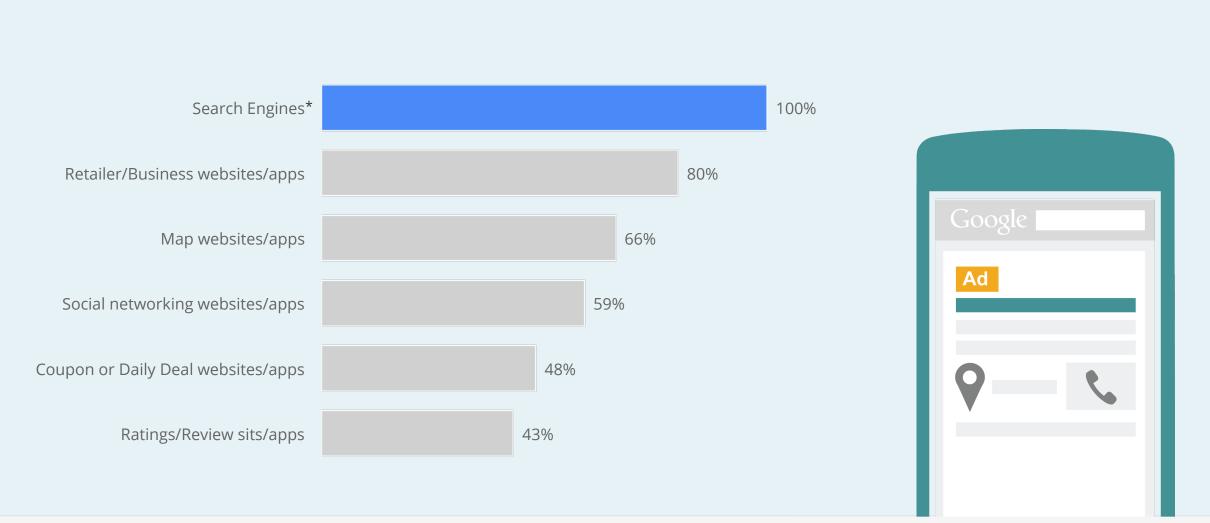
Consumer Profile: Location







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



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