



Near me



The Brandify Local Search Consumer Survey



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Introduction

This report describes the results of the Brandify Local Search Consumer Survey, conducted in October and November 2019. The purpose of the survey was to illuminate the preferences and habits of ordinary consumers from across the U.S. when searching for information about nearby businesses.

We were particularly interested to get a better view of cross-channel search habits than previous studies have made available. We've observed that many local search studies operate from an unspoken assumption that search activity begins and ends with Google.

This assumption, while not entirely unfounded, is likely based on the priorities of traditional SEO, which is specifically designed to optimize websites to be more competitive in traditional search and its modern extensions (mobile, voice). In that paradigm, Google makes sense as the default.

But in local, it's fair to say that Google, though unquestionably the dominant channel, is not the only source consumers trust to provide useful information about businesses. We wanted to remove what we perceived as a bias toward Google as the frame of discussion, and simply ask consumers what search tools they prefer to use for local, with Google Maps, Google's primary local search tool, as one among many choices.

This change in perspective produced some interesting results, as you will see in more detail below. While Google Maps was,

unsurprisingly, the most popular choice for local search by a significant margin, other channels were better represented than we might have guessed. This result suggests that, though our local search strategies must inevitably center on Google and its various local properties, any well-rounded strategy (especially in today's hypercompetitive market) must include Apple Maps, Yelp, Facebook, and other channels favored by a significant number of consumers. Business websites, too, continue to be a trusted source of information in the minds of the consumers we surveyed.

In addition to the focus on channels, we were interested to discover what types of local businesses people typically search for, as well as the types of information they tend to look for. Here, we wanted to know, for instance, whether the popular categories showcased in many search tools, such as restaurants and gas stations, really did represent the categories consumers care most about.

We were also interested in an aspect of consumer intent that is not easily revealed by any currently available metrics. We have tools, for example, that reveal the search terms people typically use to find your listings on Google. But the intent behind certain terms is more opaque. When consumers search for a business by name, for example, are they likely to be doing so because they want a phone number, hours of operation, or something else? The correlations we were able to draw in this survey appear to shed some light on these questions.



Summary of Key Findings

77% of consumers choose Google Maps when searching for nearby businesses.

Facebook, Yelp, and the business's own website are used by 32% to 38% of consumers for local search.

A significant minority of consumers, from 13% to 19%, use Google Assistant / Google Home, Instagram, Apple Maps, Waze, and in-car navigation for local search.

A smaller minority, from 2% to 10%, use a range of other tools including Bing, Amazon Alexa, Foursquare, and several niche and specialty sites.

When given a choice, 48% of consumers name a tool other than Google Maps as the most useful for local search.

74% of consumers conduct local searches at least once a week.

83% of consumers have searched online for a restaurant in the last 30 days, 51% for a retail store, and 33% for a doctor or medical facility.

81% of consumers prefer to use a smartphone for local search.

58% of consumers conduct most local searches from home.

Consumers consider hours of operation and basic contact information to be the most critical data points in listings, followed by reviews and links to the business website.

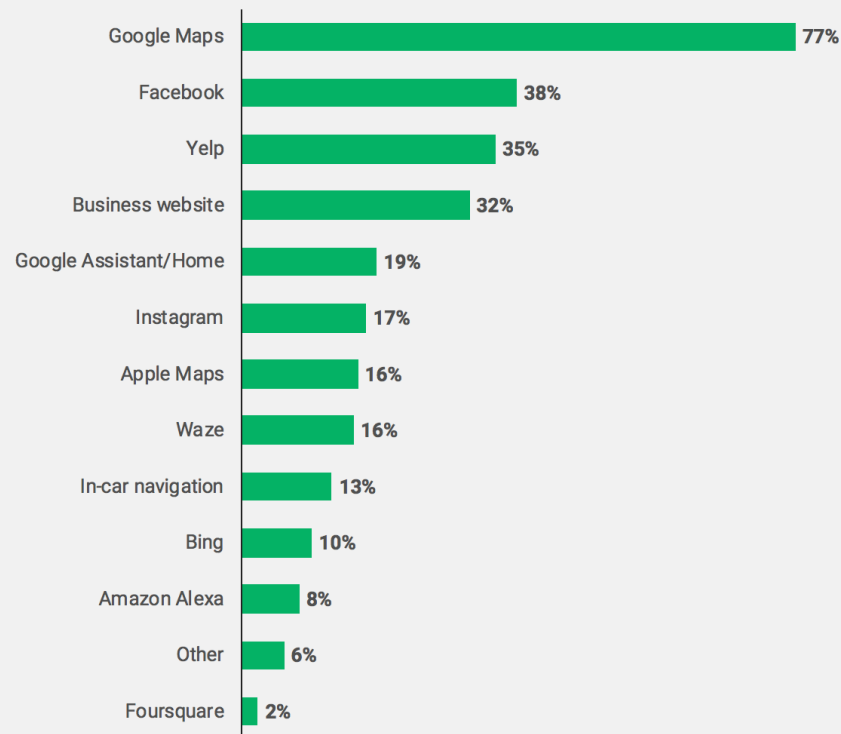
56% of consumers say they are likely to visit a business in person after searching, and 53% say they are likely to visit right away or on the same day.



Local Search Channels by Popularity

We asked the respondents which tools they use to find information about nearby businesses, allowing them to select multiple responses. We wanted to gauge the range of sites and apps consumers are likely to turn to when seeking out local business information.

Which tools do you use to find information about businesses near you?



Though we weren't surprised to see Google Maps at the head of the pack, selected as a favored option by 77% of consumers, we were struck by collective popularity of the other options on the list. The thirteen available options fall somewhat naturally into four sets, with Google Maps occupying the first set on its own.

The second set of popular sites consists of Facebook (38%), Yelp (35%), and business websites (32%). We then see a drop of several percentage points before arriving at the third grouping, which includes Google Assistant/Home (19%), Instagram (17%), Apple Maps (16%), Waze (16%), and in-car navigation services (13%), then a slight drop to the fourth grouping including Bing (10%), Amazon Alexa (8%), Other (6%), and Foursquare (2%).

A couple of observations here. First, we did not call out Google's generic search page as an option to choose from, on the assumption that for most users, Google is an entry point for search no matter what the destination. Our idea here was to correct for the imprecision of naming "Google" as the source of business information, when the actual destination might have been Yelp, the business website, or some other resource. We used the term "Google Maps" to capture, of course, the mobile app of that name, and also Google's various flavors of local search most of which use a map as an indicator of location.

Second, it's worth noting that when consumers say they use in-car navigation services, they may be referring to a range of services, from Google and Apple in-car integrations to native navigation apps to devices made by companies like TomTom and Garmin. But given that we identified tools like Google Maps, Waze, and Apple Maps

as separate options, we believe that a consumer's selection of the in-car navigation option points to navigation services and tools built specifically for the car, rather than merely using one's phone to navigate while driving.

The "other" category solicited an interesting range of alternative responses, as we might have expected. These included sites and services like DuckDuckGo, BBB, Glassdoor, Garmin, TripAdvisor, HappyCow, FindMeGlutenFree, and Siri. Though some respondents did simply write "Google" in the "other" box, our suspicion that this may not be a precise answer was borne out by several other responses like "Chrome," "Safari," "Web Browser," and "Internet." Clearly, some users focus more on the starting point of search than the destination.

Finally, we think the low rating for Foursquare deserves an asterisk. Foursquare has evolved since its inception from a once-popular consumer app to a location data company whose listings are syndicated to some of the most popular apps today, such as Apple Maps, Uber, and Snapchat. It's very likely, then, that consumers are interacting with Foursquare data on a frequent basis without being aware of the fact.

Local Search Channels by Usefulness

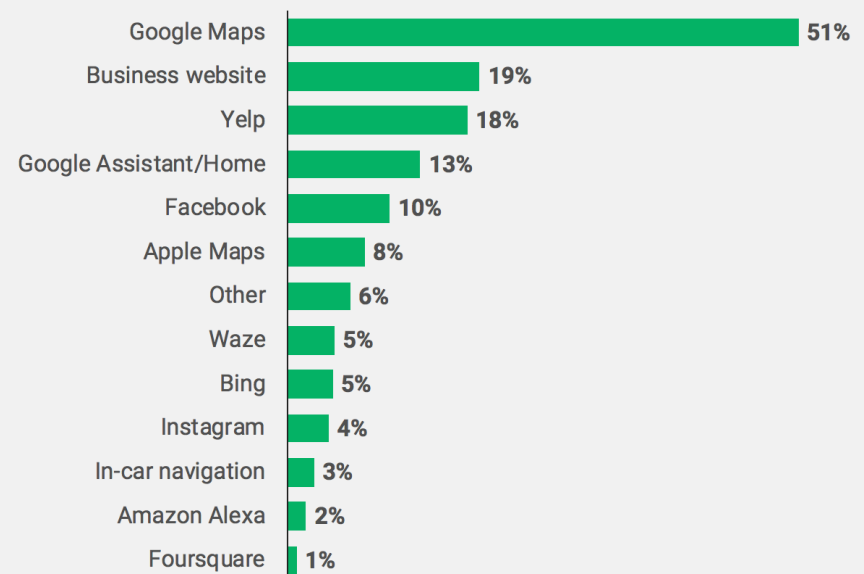
We also wanted to ask consumers to name the app or site they found most useful for local searches. Here, the respondent could select only one tool.

Notably, when forced to choose only one search tool, 26% fewer respondents chose Google Maps. Google Maps was named most useful by a majority of 51%, followed in somewhat distant second place by the business's website at 19%. Also placing fairly high were Yelp at 18%, and Google Assistant/Home at 13%. Again, Google Maps is considered most useful by most consumers, but when consumers need more information about a business, they are likely to turn to the business website or another trusted source. Many consumers seem to find Google's voice search services particularly useful, reinforced perhaps by the popularity of Google's local results.

Collectively, 49% of respondents chose a tool other than Google Maps as "most useful." Though many of those tools were chosen by a relatively small minority, together they make up a viable list of alternatives preferred over Google Maps by nearly half of those surveyed.

Among the tools identified in the "other" category for this question were DuckDuckGo, BBB, HomeAdvisor, Nextdoor, Siri, and TripAdvisor.

In your opinion, which of these is the most useful tool for looking up information about businesses near you?



Frequency of Local Searches

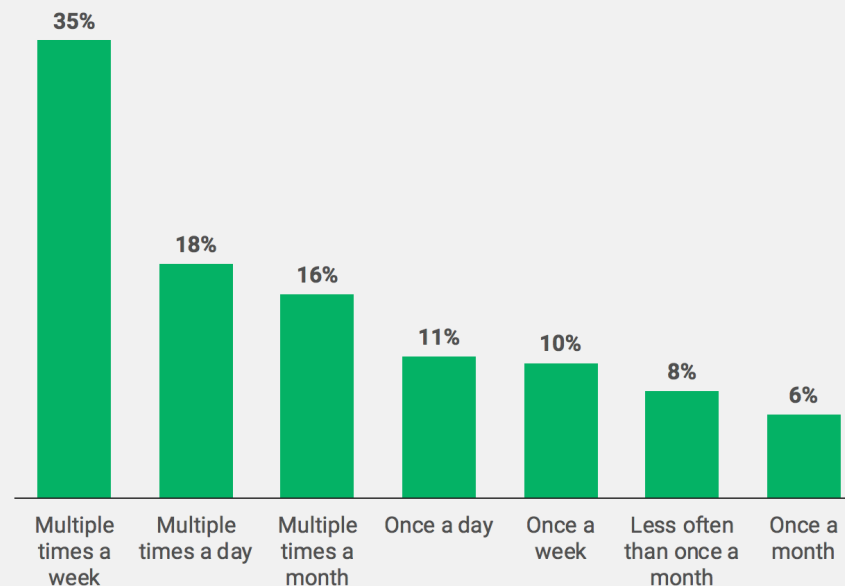
We were interested to find out how often consumers conduct local searches. The results are shown in the chart below.

It appears that, as a general rule, consumers use local search tools quite frequently, with the most popular answers being “multiple times a week” at 35%, followed by “multiple times a day” at 18%. The very fact that the most frequent among the available choices came in second overall is a strong indicator that people use local search quite a lot. Amongst all respondents, 74% conduct local searches at least once a week.

Suspecting that various demographic factors might come into play with this particular question, we decided to look at the correlation between frequency and age group. As one might expect, those in younger demographics conduct local searches more frequently, with 90% of respondents aged 18-29 indicating they conduct local searches at least once a week. On the other end of the age spectrum, only 56% respondents aged 60 or older reported the same search frequency.

The lesson here is that age matters to search behavior, though in all demographics, the majority of respondents conduct local searches quite frequently. Gender seems to matter less than age, although males appear to be slightly heavier users of local search tools based on the survey results. For instance, males chose “Multiple times

How often do you look up information about businesses near you?



a day” at 20% overall compared to females at 16%. A total of 76% of males reported conducting local searches at least once a week, compared to 73% of females; however, it should be noted that this

Local Searches by Business Type

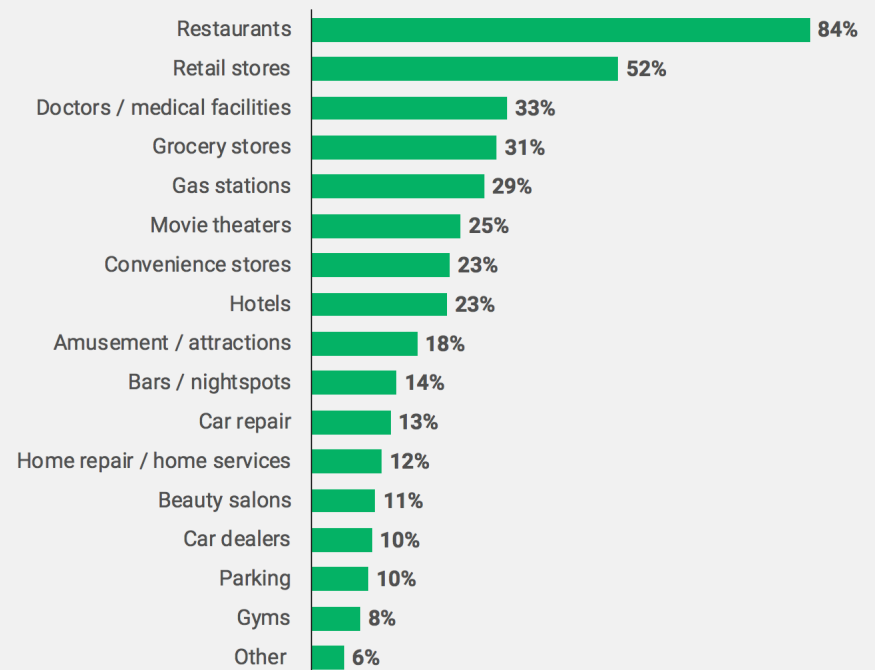
We asked respondents to indicate which types of businesses they've looked up using local search tools over the last three months. Here, we were interested primarily in the respondents' perceptions of the types of businesses they tend to search for, especially in comparison to the standard selections offered in many local apps such as Google Maps, Apple Maps, and Yelp, which tend to favor "traveler search" options like restaurants and gas stations.

This result is likely a measure of frequency of need in addition to popularity; for example, consumers are more likely to search for restaurants more often than for car repair, or for gas stations more often than beauty salons. Restaurants is, not surprisingly, the dominant category, selected by a whopping 84% of respondents, but the range of responses show that consumers are using local search to fill a very wide variety of needs and desires.

In fact, all but three categories — parking, gyms, and "other" — were selected by at least 10% of respondents. We were especially interested in the popularity of doctors / medical facilities, chosen by 33% of respondents, making it the third most popular category behind restaurants and retail stores.

For this question, respondents who chose "other" indicated a wide range of business types including assisted living facilities, dispensaries, pet clinics, pet supply and grooming, dry cleaners, parks, food delivery, yoga studios, towing services, tanning salons, wineries, and several more.

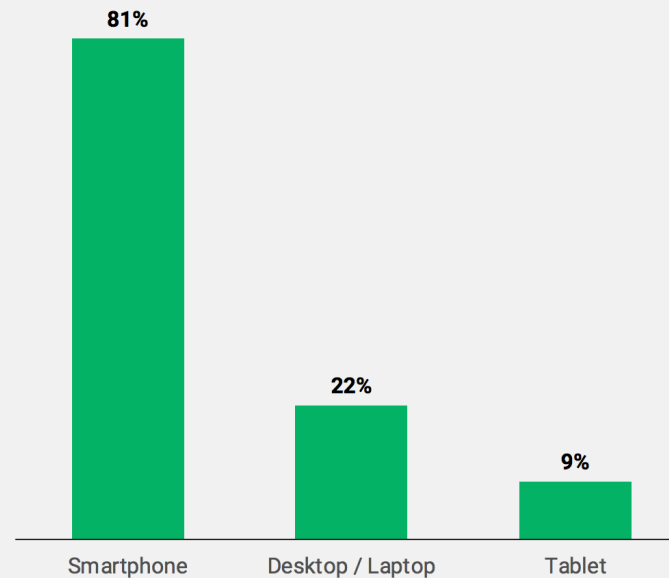
What types of businesses have you looked up online in the last 30 days?



Preferred Devices for Local Search

We asked what device consumers were most likely to use when looking up information about nearby businesses. Respondents could select only one answer. The vast majority, 81%, selected the smartphone as their preferred device, with desktop / laptop a distant second at 22% and tablet third at 9%. We did not ask about voice search devices in this survey, assuming that for many consumers, voice search is conducted on smartphones at least as often as on dedicated smart speakers.

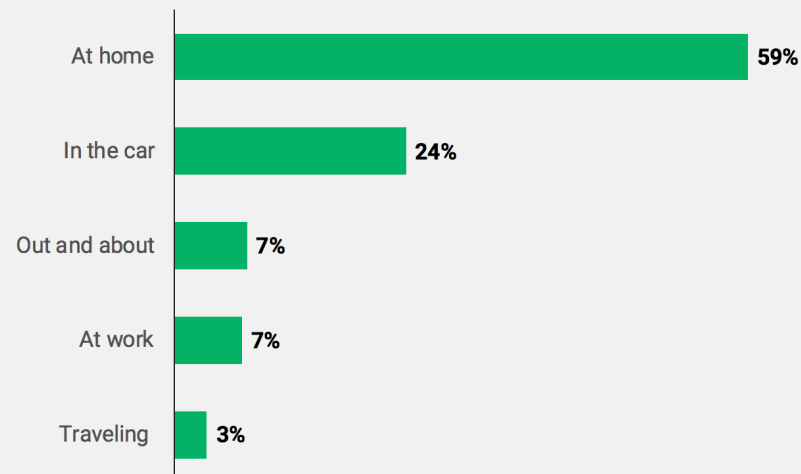
Which device are you most likely to use when looking up information about businesses near you?



Location When Searching

In an unexpected result, a significant majority of respondents, 59%, answered that most local searches are conducted at home. Perhaps this reflects a behavior pattern where consumers are most likely to search for local businesses during leisure time or outside of working hours, when planning for activities on the weekend or getting ready to run errands. Still, we would have expected more consumers to select “out and about,” based perhaps on a biased assumption that much of local search occurs in the so-called time of need, when consumers are actively looking for a business to visit. Regardless, “in the car” was the second most popular choice at 24%.

Where are you most likely to be located when you look up information about businesses near you?



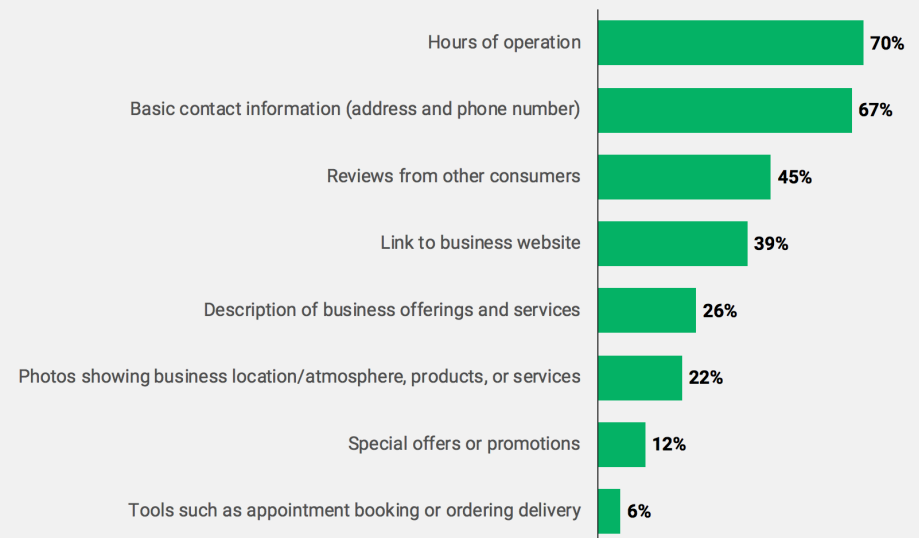
Information Consumers Care Most About

In one of the more interesting sections of the survey, we asked consumers which data points they find most important when searching for nearby businesses. We figured there would be some helpful correlations between this question and others, and that proved to be the case.

Respondents were asked to indicate the three most important pieces of information in business listings. A significant majority of 70% selected hours of operation, the most popular data point, with basic contact information (name, address, phone number) coming in second at 67%. These items might be considered the most critical data points for all businesses, followed closely by reviews at 46% and link to the business website at 39% — listing components that are similar in the sense that they belong to the consideration phase of a purchase, when consumers seek further information in order to assess the value of a business and compare it with alternatives.

The third pair of data points consists of business description at 26% and photos at 22%, also part of the consideration process but considered less important by respondents than reviews and website links. Finally, consumers rated special offers or promotions (12%) and tools like appointment booking (6%) the lowest of all, perhaps because they are only occasionally available and do not apply in all business situations.

When looking up information about businesses near you, what three items do you find most important?





Links Between Favored Info and Business Type

Curious as to whether the choice of data points was dependent on the type of businesses consumers search for, we checked for any correlation between popular business categories and favored data points in listings. We found a few possible correlations.

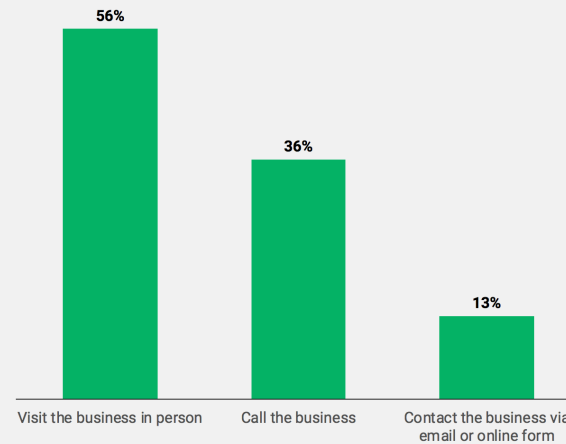
For instance, those consumers who said they had searched for information on hotels in the last 30 days chose reviews as critical at almost 10 percentage points higher than the norm, or 55% compared to 46%. Those who chose doctors / medical facilities favored basic contact information over any other data point at a rate of 76%, suggesting that people may look up doctors' offices for directions before heading to an appointment, rather than using search tools to find a doctor in the first place.

The survey results offered many potential correlations of this type. Further research should likely be done to expand upon these results and focus more narrowly on the data points favored for searches in specific categories. It might also be of interest to draw a distinction between keyword searches ("sushi restaurant near me") and branded searches ("Yamato Japanese Restaurant") when assessing favored data points in listings.

Actions Consumers Take After Searching

Asked to choose their most likely action after looking up information about a nearby business, a majority (56%) of consumers said they were likely to visit the business in person, suggesting that consumers feel listings (and business websites) in many cases give them all the information they need to make a purchase decision. A significant minority of consumers (36%), however, see themselves as more likely to call a business first. A smaller number (13%) is likely to make their initial contact with a business online.

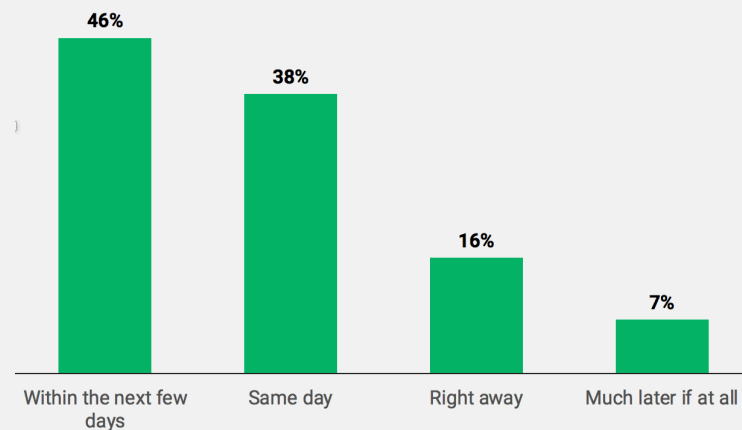
What is the first action are you most likely to take after looking up a business near you?



Timing from Search to Offline Visit

Asked to identify how soon they are likely to visit in person after looking up a business online, a plurality of respondents, just short of a majority at 49%, chose "within the next few days." This answer beat out the two more timely responses, "same day" (38%) and "right away" (16%), though looked at in combination, the latter responses indicate that 54% of consumers feel they are likely to visit a business either right away or the same day they perform a search.

When looking up information about businesses near you, how soon afterward do you typically visit the business in person?





Conclusion

In summary, the present study illuminates some meaningful patterns in consumer search behavior, as well as suggesting directions for future research. The results indicate that consumers have grown acclimated to using a range of search tools when seeking information about local businesses. Though Google Maps is the clear favorite, many other resources, in particular Facebook, Yelp, and business websites, attract significant consumer attention.

When searching for businesses online, the vast majority of consumers prefer to use a smartphone, and many search from home before visiting a business in person. Consumers perceive themselves as conducting local searches frequently, with the vast majority searching at least once a week if not more often. They search for a very wide range of businesses, with restaurants and retail shopping named as the most popular categories.

Consumers are particularly interested in finding hours of operation and basic contact information when they look up local businesses, though many also find reviews and links to the business website to be highly important. The majority of consumers see themselves as likely to visit a business in person after performing a search, likely on the same day.

Building on the results of this study, future research might examine the following:

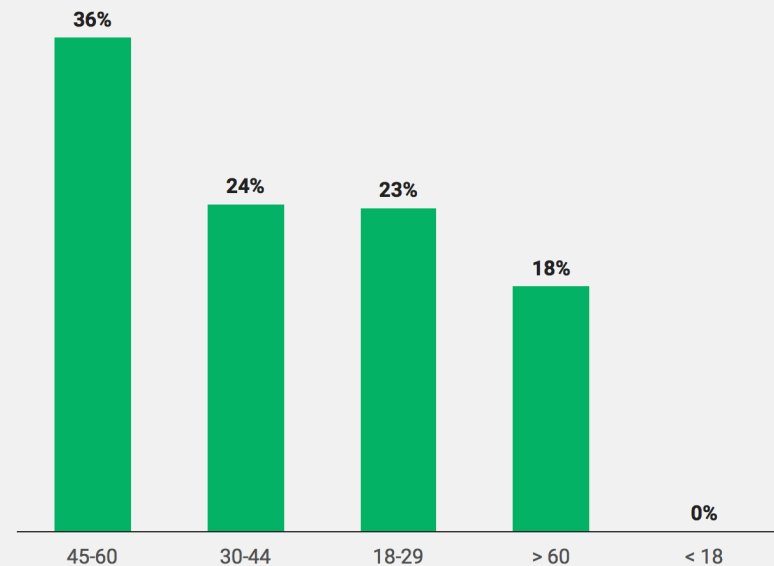
- The relative usefulness of different search tools depending on the type of business searched for.
- The relative importance of listing data points depending on the search tool or the type of business searched for.
- Timeliness of search to transaction depending on the search tool or the type of business searched for.
- Search habits of digital marketers as compared to average consumers, for purposes of correcting any biases.

Methodology

We collected responses to our survey from 1,027 consumers on October 11, 12, 31, and November 1, 2019. Respondents were distributed across all 50 U.S. states with a gender mix of 47% male and 53% female. The margin of error for this survey was 3%. Age distribution is shown below.

As with any survey of this type, we are dependent upon consumers' recollections of their own behavior and habits. We feel, however, that the results represent a useful barometer of consumer perceptions about the tools they turn to for local business searches and the types of information they are likely to seek.

Age





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