MARKET RESEARCH

Google DMA compliance: A study of consumer home services search behavior in Germany, France, and Ireland

Concudted by NEAR MEDIA

Summary

Google displayed its own Map and Business Profiles to searchers looking for kitchen remodeling professionals nearly twice as often as the Places Sites module, the purported centerpiece of its response to Digital Markets Act Article 6(5) prohibiting self-preferencing.

When visible, Google's own Business Profiles received 20 times the number of clicks as Places Sites, and more clicks than traditional third-party organic results.

We analyzed the sessions of 300 German, French, and Irish consumers, who had granted screen and audio recording permission, as they searched for kitchen remodeling professionals using Google.com.

The Places Sites module was visible just 33% of the time, as opposed to 57% of the time for Business Profiles, which users often encountered multiple times in the same search result.

The 1% of clicks that went to Places Sites appeared to come at the expense of clicks that Aggregators and Publishers would have traditionally received from organic results, and had no impact on clicks to Google Business Profiles.

The other chief component of Google's DMA response, Aggregator Carousels, were seen just 3% of the time and received just 1 of 848 total clicks made by our consumer panel.

Just 1 out of 300 searchers clicked the Places Sites chip above the body of search results.

Introduction

Building on Near Media's March 2024 research in the restaurant vertical, Near Media and Siinda sought to evaluate whether Google's local search interface elements introduced in response the Digital Markets Act[1] were seen by searchers as frequently or as prominently as Google's own properties (Google Maps and Google Business Profiles), and whether those elements received meaningful searcher engagement.

Article 6(5) of the European Union Digital Markets Act, passed in 2022, requires that digital gatekeepers (including Google's parent company Alphabet) not treat "more favourably, in ranking and related indexing and crawling, services and products offered by the gatekeeper itself than similar services or products of a third party" and that gatekeepers "apply transparent, fair and non-discriminatory conditions to such ranking."

[1] https://developers.google.com/search/blog/2024/02/search-experiences-in-eea

Numerous software tools exist for tracking the rankings of individual websites and certain interface elements across individual Google queries and ranges of queries. Google itself reports click data to verified website owners in Google Search Console and to verified profile owners in the Google Business Profile (GBP) console.

Historically Google has kept click behavior that takes into account the entire Search Engine Results Page (SERP) to itself. Typical user interface tests using prototypes and mockups are useful proxies, but hide significant nuances found in live search experience data.

Near Media regularly conducts consumer behavioral research on behalf of its enterprise clients. We applied our typical methodology to understand what impact on searcher behavior these new SERP result types would have, if any, within the E.U.

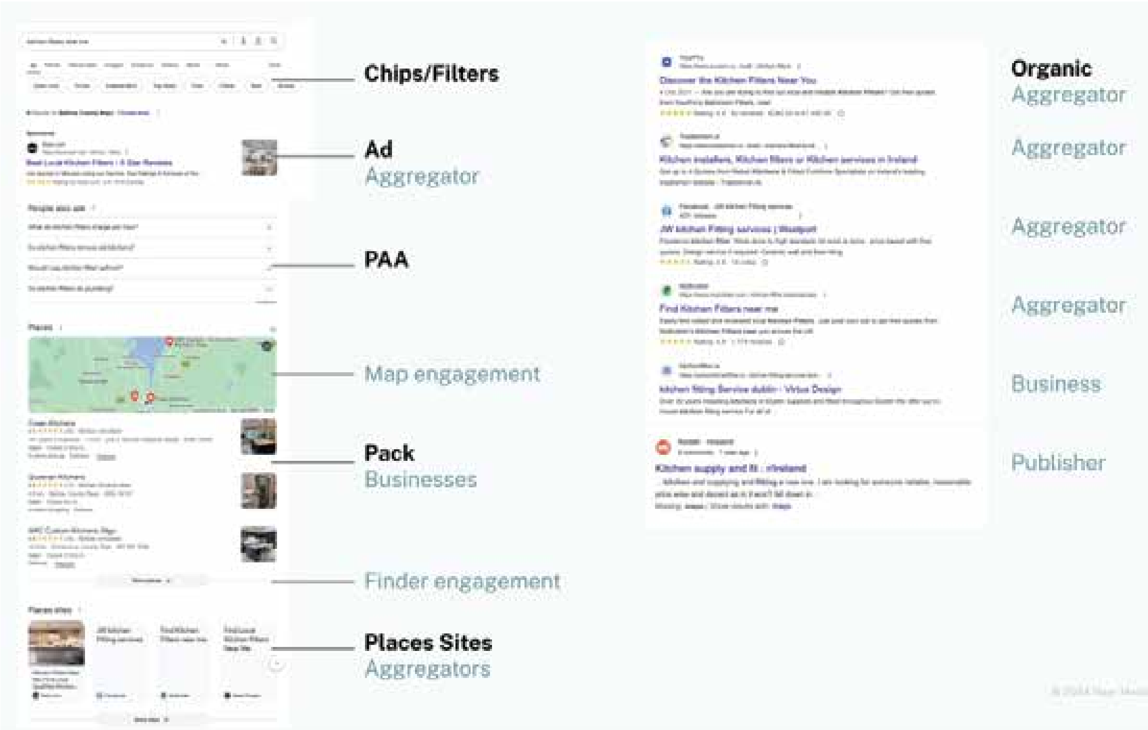
Among the questions we sought to answer:

• What search interface types received the most engagement, and by extension, did the new Places Sites module receive meaningful engagement?

• Did Aggregators receive a boost from this new (ostensibly more favorable) post-DMA treatment?

• How widespread is the "zero-click search" phenomenon, whereby a searcher never leaves Google's own properties before making a decision?

Glossary


Chips/Filters
Ad
Aggregator
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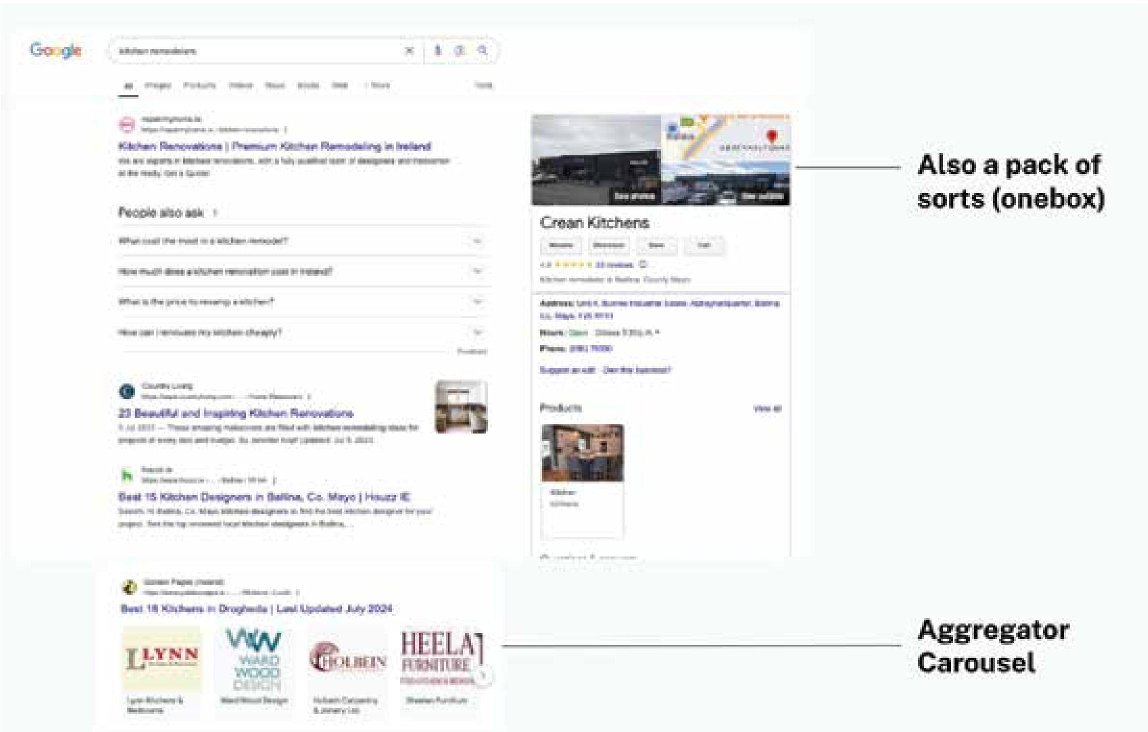

Also a pack of sorts (onebox)
Aggregator Carousel

SERP Visual Glossary

The acronym for Search Engine Results page. The page shown following a user's query, featuring multiple result types and modules.

1 Refinement Chips/Filters

Part of the auto-generated tabs at the top of the search results; the Places Sites chip takes you to an organic page of local aggregator results when selected.

2 Traditional Ads

Google's classic text-driven, auction-determined promotions shown most commonly at the top of a given search result.

3 People Also Ask

An accordion-style module within Google search results that presents an algorithmically-generated list of questions related to the user's original query. It's designed to anticipate potential questions that users might have and presents answers driven by single-website snippets directly within the search results.

4 Local Pack

A module typically consisting of three Google Business Profiles (GBPs) below or alongside a Google Map. Clicking More Places or More Businesses at the bottom of the Pack takes a user into the Local Finder, featuring Google Business Profiles exclusively.

5 Places Sites Aggregator Unit

A carousel of local aggregator sites that is placed in local search results. Placement varies, but is frequently either just above or just below the Local Pack.

6 Organic Results

Unpaid webpage listings ranked by Google's traditional quality algorithm.

7 Second Local Pack

Audaciously, Google has introduced a second instance of its own GBP results for certain queries.

8 Aggregator Carousel Rich Result

Usually appears within the organic results below the Local Pack and highlights multiple business profiles from one aggregator. It can, if the aggregator is ranked strongly enough, appear higher in the results.

9 Local Onebox Result

A single Google Business Profile, usually appearing for a brand query specific to that business. Shows up in the righthand rail of desktop results and above organic results on mobile devices.

10 Aggregator
A centralized web property built upon structured information about many hundreds or thousands of businesses in a given consumer category or categories. Aggregators typically monetize by charging businesses for placement or enhanced listings, or by facilitating bookings. Also commonly referred to as a “directory” in the United States.

11 Publisher
A web property primarily consisting of unstructured content monetized by subscription revenue or advertising revenue based on the number of impressions driven.

12 Business
In the context of this study, kitchen installation and manufacturing companies who sell directly to consumers.

Methodology

To answer these questions, we recruited a panel of 300 German, French, and Irish consumers, split equally by country and across Desktop and Mobile devices, presented them with a home services search scenario, and analyzed and aggregated their narrated behavior in their native languages:

You've wanted to remodel your kitchen for a long time and you're finally going to get started on it this summer. You've decided that it's too big a project to take on yourself and you're going to hire professionals for the job.

You decide to search Google to help find professionals for your project.

Browse and click any results you’d like. Please “think out loud” as you search and describe your thoughts and reactions.[2]

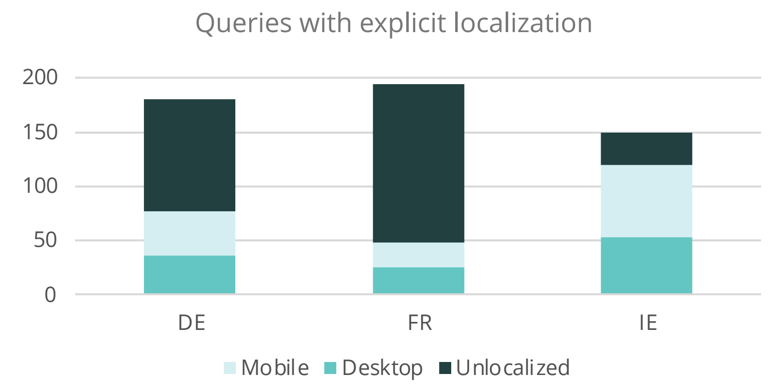
We loaded the default Google.com homepage in their browsers at the start of the task. We then recorded their screens and audio narration (with permission), and aggregated and analyzed their behavior and decision-making rationales.

Any click was deemed to be a “consideration,” as was any extended focus on an individual profile with narration that indicated the participant was evaluating that provider.

Results

Search and Local

Somewhat surprisingly, our panel of searchers explicitly localized their queries using a geographic keyword or "near me" just 47% of the time. Irish searchers were considerably more likely to do so than their German and French counterparts.

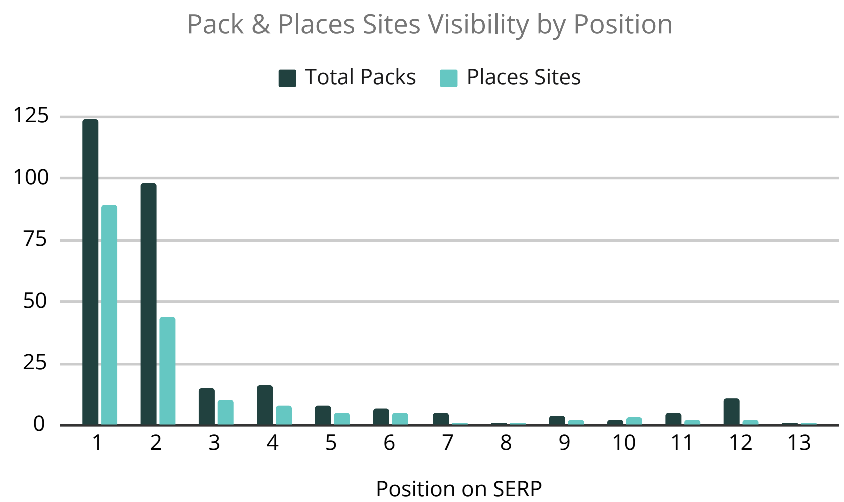


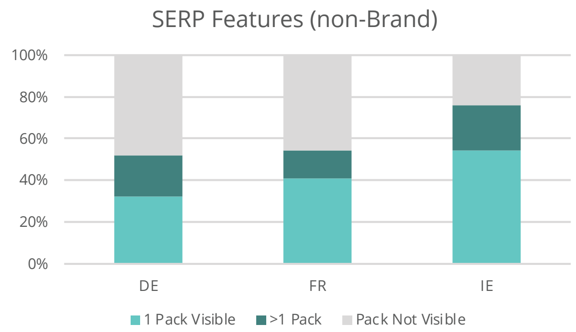
Pack & Places Sites Visibility by Position

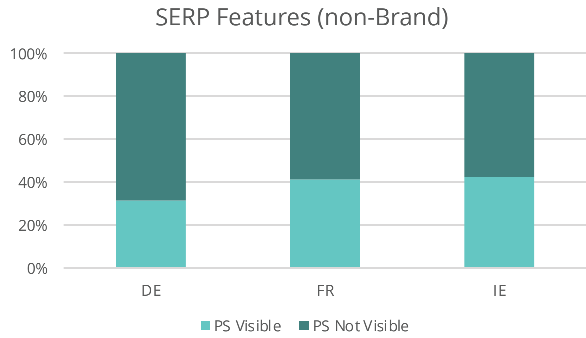
Google Business Profiles were visible for 78% of these localized searches and for 39% of the remaining searches, where Google may have inferred implicit local intent. (Google Business Profiles were more visible to Irish users as a result of their more explicitly local search behavior.)

Places Sites were visible for just 48% of localized searches and 20% of others.

Aggregator Carousels were nearly nonexistent, visible for just 3% of explicitly localized searches, and receiving just 1 out of 848 total clicks.



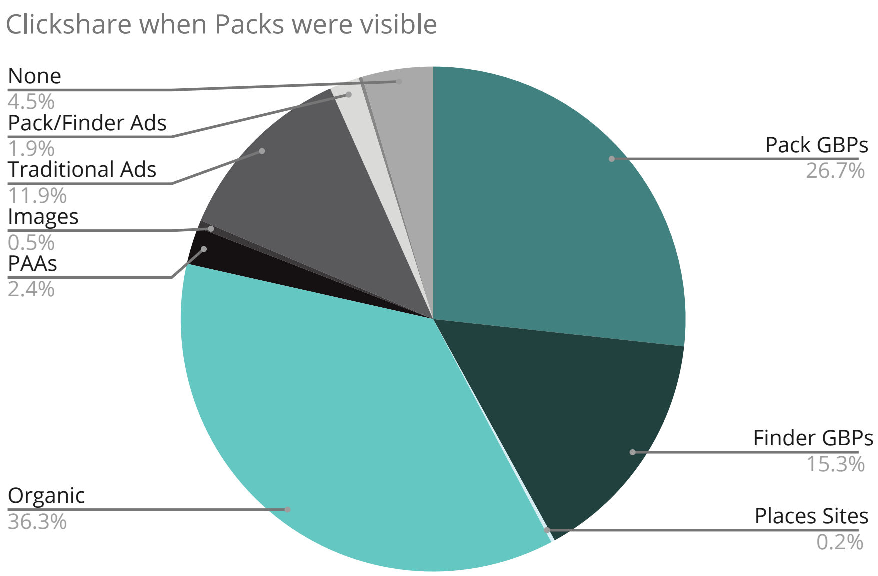




GBP performance for localized search

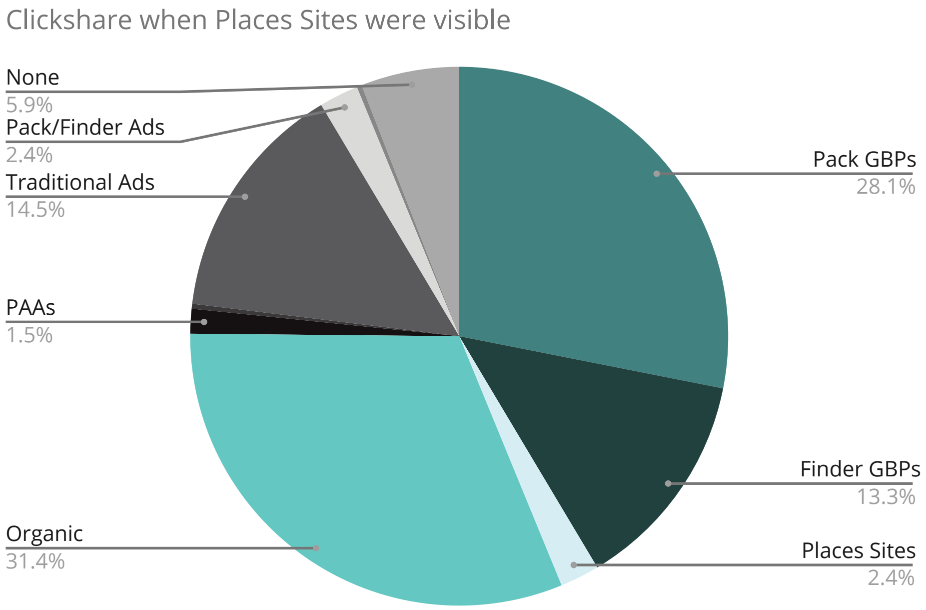
Where Google displayed the Places Sites module, it was frequently placed in the second position, above Google Business Profiles[2]. But this prominent placement was counterbalanced by the visual weight of the Google Map interface that accompanies Google Business Profiles , and the weight of the People Also Ask module directly below it. Google also displayed a second Local Pack of Business Profiles on 15% of all search results (35% of results where the Places Sites module was visible)

Others – Places and co- performance



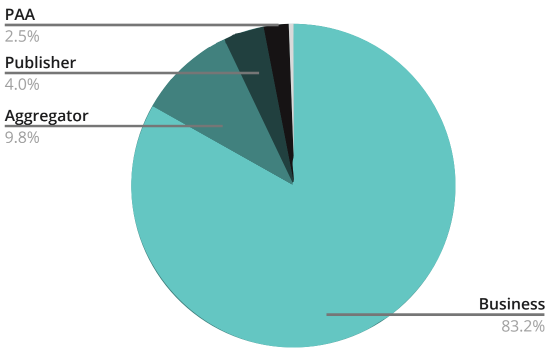
Engagement with Google Business Profiles drove 42% of all clicks for searchers where they were visible. The overwhelming majority of clicks on Google Business Profiles came when they were displayed in the first or second organic position.

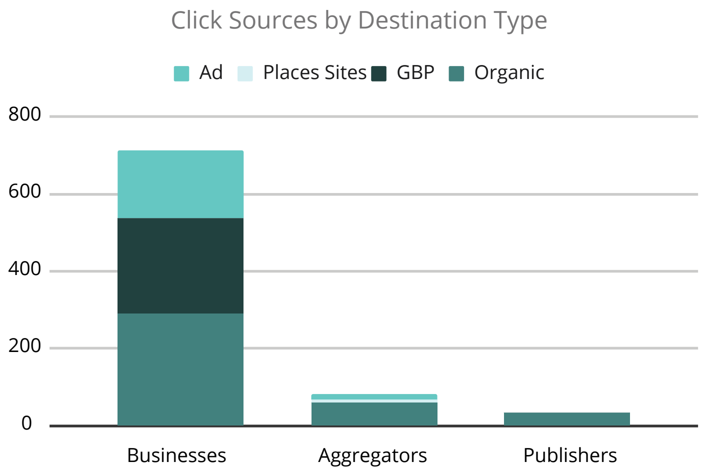
[2] Google exclusively shows its own Maps product within the Local Pack and Finder, with no user option for an alternative mapping provider.



Meanwhile, Places Sites received just 2% of clicks when they were visible. From a clickshare standpoint, Places Sites primarily decreased the percentage of clicks Google sent to traditional organic results – Google Business Profiles' click share dropped only 0.5%.

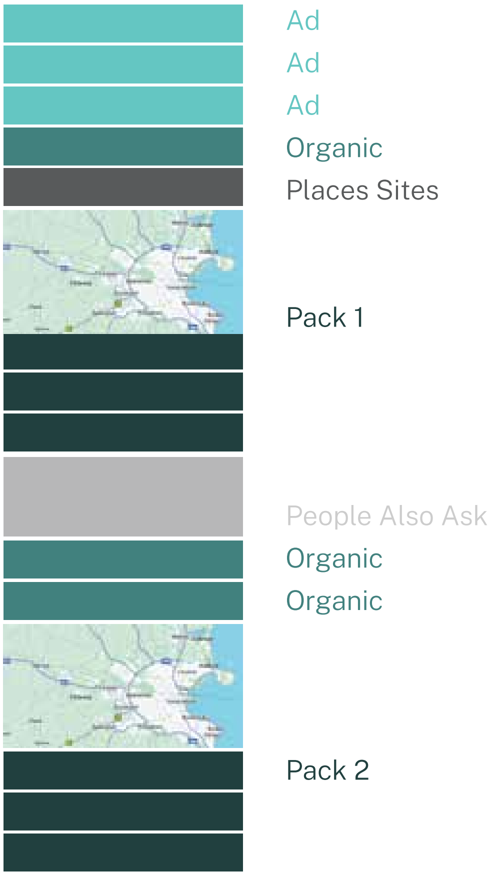
Searches with at least one consideration





8 out of 10 clicks overall went to businesses ("Suppliers"). Just 1 in 10 went to Aggregators, and barely 1 in 25 clicks went to Publishers.

The “Median SERP”



At the left is a graphical illustration of the most common discovery search result pattern shown when Google determined the query to have local intent.

Three ads are most commonly shown (sometimes one Local Services ad and two traditional ads), followed by a single organic result whose visual impact is often minimized by its surroundings.

While the prominently-placed Places Sites module is visually richer than a traditional organic result, the placement and visual weight of the Google Map just below it tends to draw searchers’ eyeballs straight to the map and associated Google Business Profiles.

The People Also Ask module almost always follows directly under the first Local Pack, serving as a visual break before the next set of organic results.

Google then typically introduces a second pack of Google Business Profiles, before showing organic results down the remainder of the SERP.

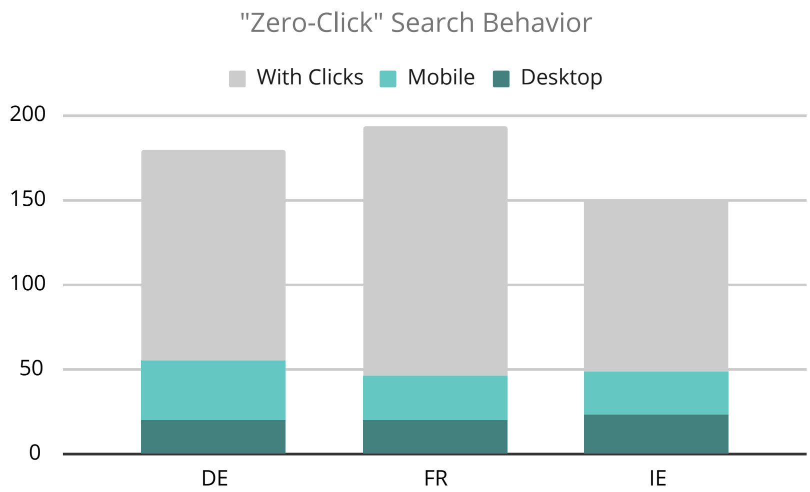
Ad performance

41% of Suppliers' traffic came via organic results, 35% via Google Business Profiles, and 24% via Ads.

Aggregators received 73% of their traffic via organic results, 10% via Places Sites, and 17% via Ads.

Even the 17% of Ad-driven clicks to Aggregators may potentially be at risk as Google introduces more specialized ad units such as Ads on Google Maps, Local Service Ads and Local Inventory Ads. In our study, these specialized ads drove as many choices for French searchers as Google's traditional ads, but Aggregators and Publishers are ineligible for these formats.

Zero click searches impact



Unlike our previous research in the restaurant vertical[3] , we saw very little evidence for so-called "zero-click search," where consumers began and ended their journey without leaving Google.

71% of all searches ended with at least one click, and most searches that ended without a click were simply unsatisfied queries, where the user subsequently refined their query and clicked through to at least one website. Users made very few choices without clicking through to the website of their chosen business.

[3] https://www.nearmedia.co/assets/Google_DMA_vertical_search_response_restaurants.pdf

Discussion

We've now conducted two post-DMA user search behavior studies in two very different categories: restaurants and home services.

Important nuances differ by category and by country, but the conclusions are clear and consistent:

1) Google shows its own Business Profiles prominently for the vast majority of local searches–78% in the case of kitchen remodeling– and almost always in Position 1 or 2. Places Sites are visible at a much lower rate, just 48% of the time even for explicitly localized queries.

2) Users are dramatically more likely to engage with a Google Business Profile than a Places Site: 20x more likely in the case of our kitchen remodeling scenario. When the Local Pack was visible to users, Google Business Profiles drew the plurality of their engagement (42%). Google Business Profiles received twice as many clicks as aggregators and publishers in our study, many via the Google Map interface which appears prominently as part of the Local Pack and Local Finder elements.

Conversely, Places Sites drew just 2% of user engagements when they were visible. These clicks appeared to replace organic traffic that Aggregators and Publishers ranking in the same spot organically might have already received. Aggregator Carousels received a paltry 0.1% of all engagements.

Taken together, it would be hard to describe this as a fair and contestable playing field, as aggregators and publishers are ineligible to appear in Google Business Profiles.

Google may argue the Map interface is simply optimizing user experience, but without a user option for an alternative mapping provider (let alone local business profile provider), this would seem to be additional evidence of self-preferencing on Google's part.

Google's comment at the March 2024 European Commission DMA Workshop that the Places Sites modules were "performing well" can only have meant they were performing well for Google, and not for the wider local search ecosystem whose health the DMA was intended to strengthen.

About Near Media

Founded by three veteran local and vertical search analysts in 2021, Near Media is an applied market research firm helping marketing executives maximize their SEO & paid search investments.

Through our unique combination of proprietary consumer research, localized search result page analysis, and step-by-step performance improvement roadmaps, we are the go-to strategic and tactical advisor for brands seeking to maximize their investments in paid, organic, and local search.

Focused largely on Google and its place in the local search ecosystem, we publish a twice-weekly newsletter and a weekly podcast on the latest updates shaping local search visibility and consumer behavior, and regular analyses of search product releases and local search market dynamics.

About Siinda

Siinda is the leading European based non-profit association bringing together agencies, brands, media and technology companies in the local search, digital advertising, media, mobile and “on demand” industry sectors. We foster partnerships through our extensive members network, containing many of the most prominent media outlets in Europe and globally.