Google DMA compliance: A study of Irish consumer restaurant search behavior

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About Near Media

nearmedia.co

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.
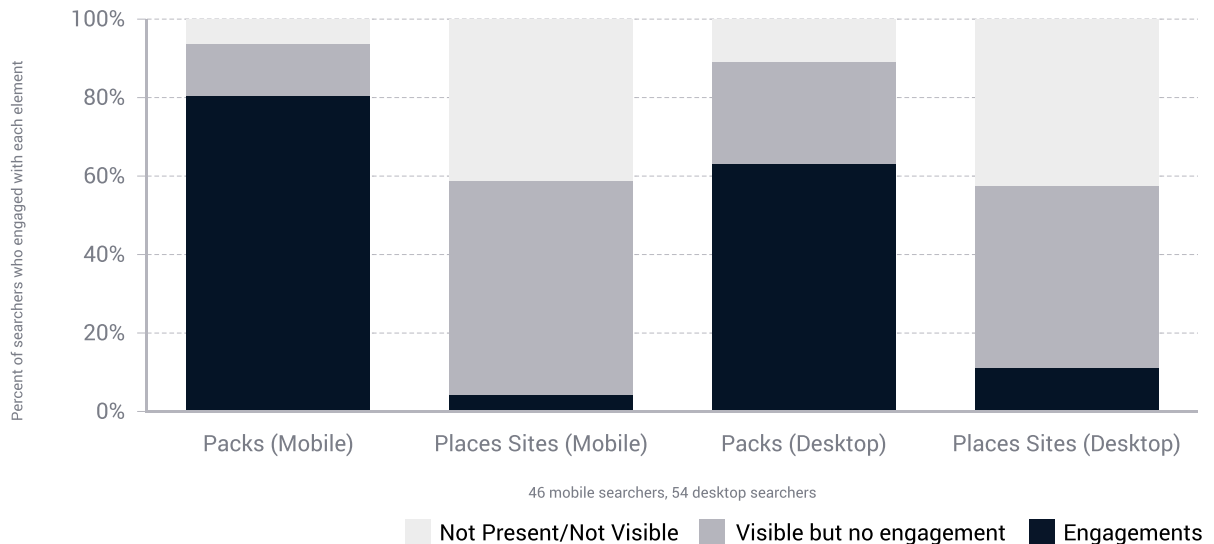
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Table of Contents

Summary

Engagement with Google SERP elements by device

46 mobile searchers, 54 desktop searchers

◻ Not Present/Not Visible   ◻ Visible but no engagement   ■ Engagements

The new Places Sites module, introduced to comply with European Union regulations around self-preferencing, may as well be invisible.

Near Media analyzed the sessions of 100 Irish consumers who had granted screen and audio recording permission as they searched for restaurants using Google.ie.

40% of searchers did not scroll down far enough down their results to encounter the Places Sites module. For the 60% of searchers who did see the module, it generated very little engagement, and even fewer clicks to the directories that are supposed to benefit from it.

Google's own Local Pack results–typically a map with three Google Business Profiles–still capture the majority of engagements and clicks from all searchers, and the vast majority clicks from Mobile searchers.

Introduction

Near Media 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."

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 U.S.-based 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.
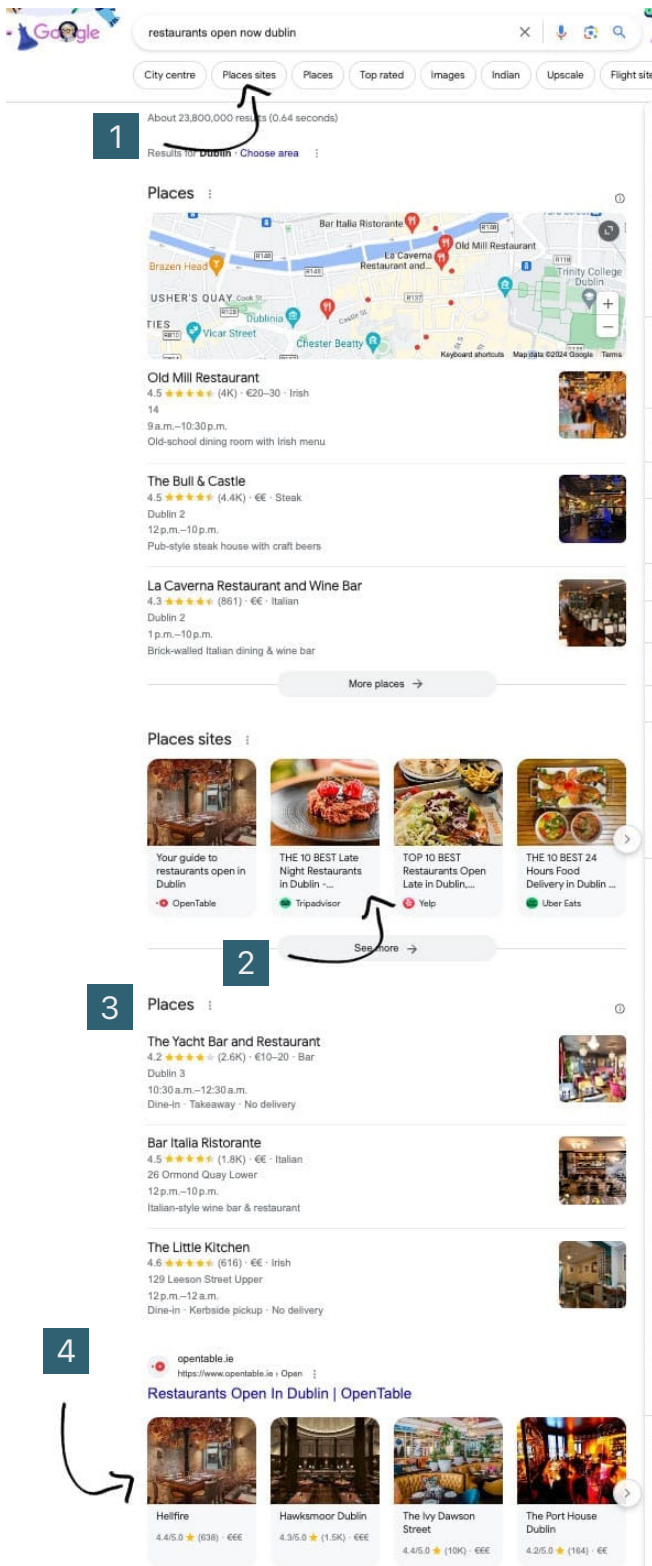
Among the questions we sought to answer:

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

- Which directories, if any, received the biggest 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?

Shown at left is a typical local desktop SERP in the E.U. (this one for *restaurants open now dublin*).

New user interface elements include:

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

2 Places Sites Aggregator Unit
A carousel of local aggregator sites that is placed in local search results. When first rolled out it appeared above the Local Pack but its placement can vary based on use behavior and it now appears below the Pack.

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

4 Aggregator Carousel Rich Result
Usually appears within the organic results below the Local Pack and highlights multiple places from one aggregator. It can, if the aggregator is ranked strongly enough, appear higher in the results.

Methodology

To answer these questions, we recruited a panel of 100 English-speaking Irish residents[2], roughly split across Desktop and Mobile devices, presented them with a restaurant search scenario, and analyzed and aggregated their narrated behavior.

We gave our panel the following instructions:

It's a Friday evening and you'd like to go out for a nice dinner with a couple of friends to celebrate a long but successful workweek.

You want to try a new place you haven't been to before, and you go to Google to help you find what you're looking for.

Please "think out loud" as you search and describe your thoughts and reactions.

What results are you drawn to? What elements of the results stand out to you? Which restaurant would you choose to go to and WHY?

Once you have selected a restaurant, please state verbally "this is the place I'd choose."
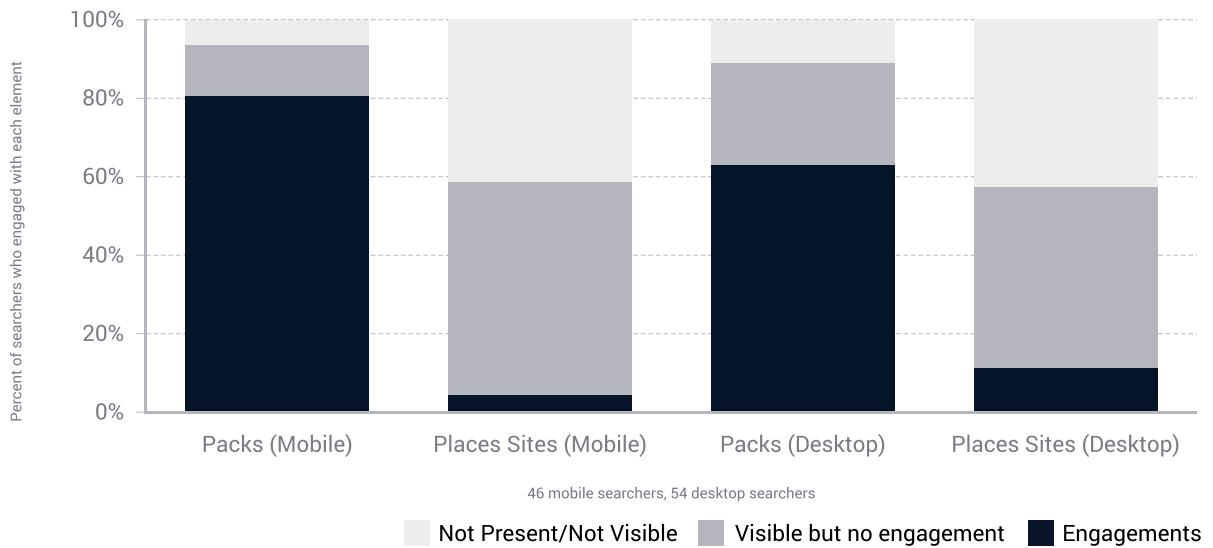
We loaded the default Google.ie homepage in their browsers at the start of the task.

We then recorded their screens and audio narration (with permission), and aggregated and analyzed their behavior and decision-making rationales.

Results

While we cannot speak to baseline searcher behavior in the E.U. prior to Google's DMA response, we found little evidence to suggest that Google has meaningfully altered the flow of search traffic beyond its own properties for local queries.
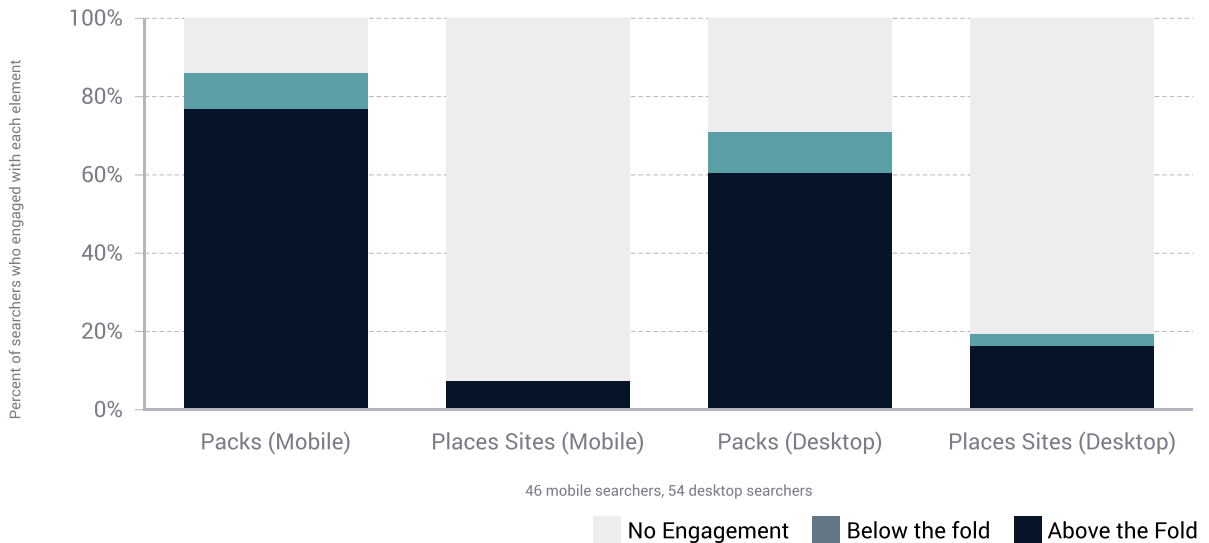
Engagement with Google SERP elements by device

46 mobile searchers, 54 desktop searchers

Not Present/Not Visible   Visible but no engagement   Engagements

40% of Irish restaurant searchers didn't scroll far enough to even encounter the Places Sites Aggregtor Unit on the SERP (if it was present at all), regardless of the device on which they searched.

Of the 58 searchers for whom the Places Sites unit was visible, only three of them engaged with the module via scrolling horizontally, and only five clicked a Places Site result.

**Engagement with Google SERP elements by element position**

Percent of searchers who engaged with each element

46 mobile searchers, 54 desktop searchers

No Engagement　　Below the fold　　Above the Fold

Across both Desktop and Mobile devices, the Local Pack appeared "above the fold" (visible on the user's screen without a downward scroll) 77% of the time, compared with only a third of the time for the Places Sites Aggregator Unit.

Conversely, Google's own Local Pack was visible to 91% of searchers, earning engagements from 86% of Mobile searchers and 70.8% of Desktop searchers.

For comparison, Places Sites engagement was 7.4% on Mobile and 19.3% on Desktop, with a much smaller sample size because of Places Sites' limited visibility.

We saw almost no searcher engagement with Refinement Chips; and in particular the Places Sites Refinement Chip.

Engagement with Google SERP result types
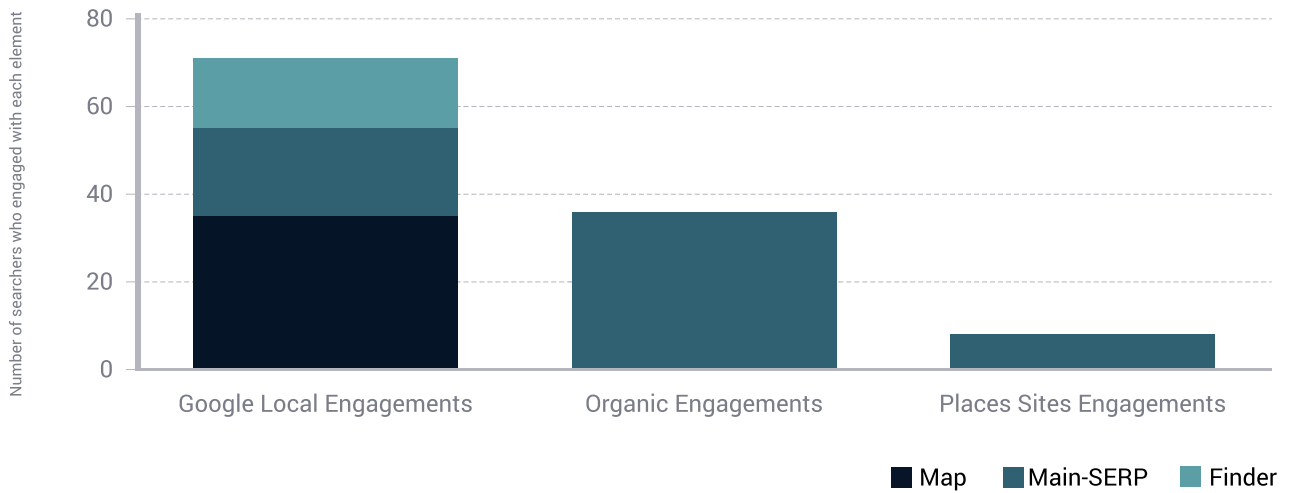
Engagement with Google's own properties (Google Business Profiles, Google Maps, and the Local Finder[3]) was roughly double the engagement with traditional organic website positions, and 10x the engagement with the Places Sites Aggregator Unit.

Aggregator traffic sources
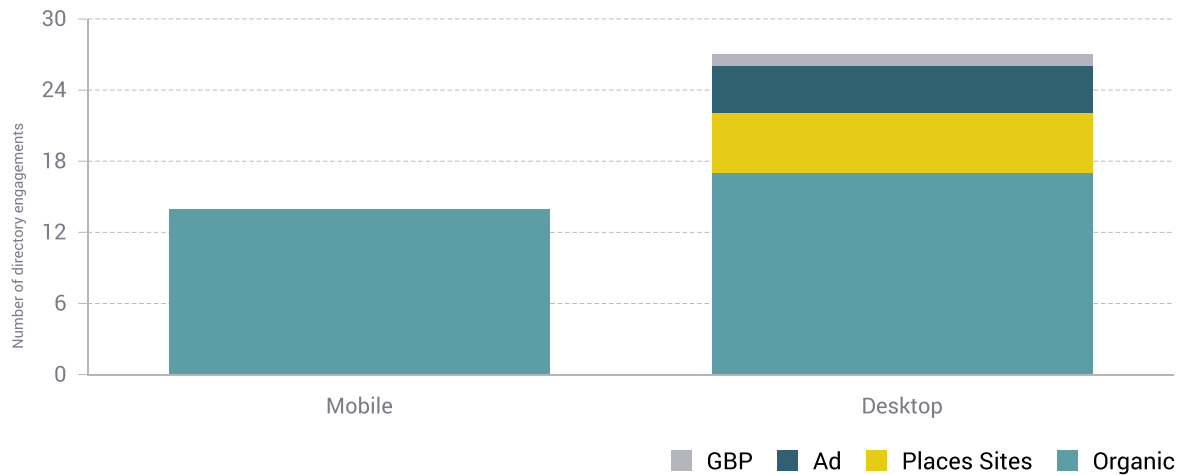
Searchers most frequently visited Aggregator sites (Directories) via clicks on organic placements. All Aggregator traffic from Mobile searchers came from organic positions, and about two-thirds of Aggregator traffic from Desktop searchers came from organic positions.
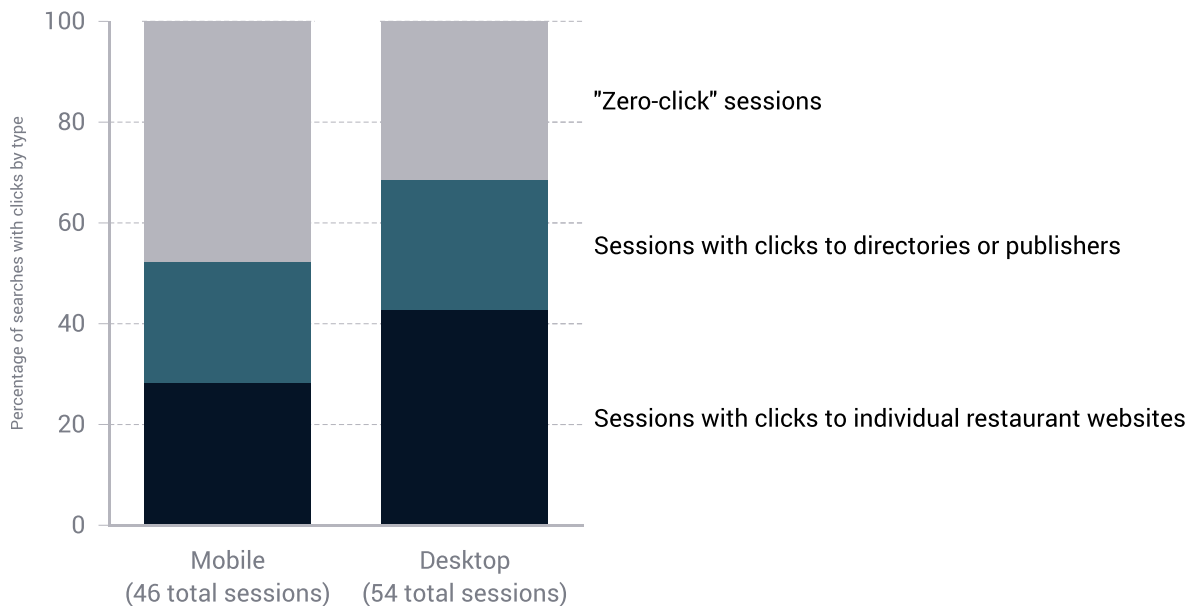
Number of clicks by domain

Legend:
- Zero-click searches
- TripAdvisor
- OpenTable
- Yelp
- Other sites
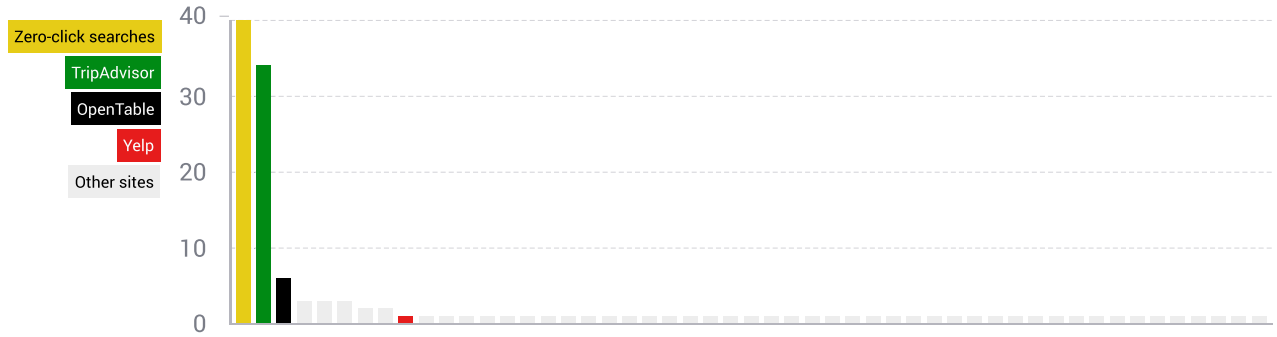
We found strong evidence for the "zero-click search" phenomenon (where a searcher never leaves Google properties prior to making a decision) in this category: it was the most frequent behavior pattern.

"Aggregator traffic" on the previous page is a bit of a misleading label: the lion's share of aggregator traffic went to a single site: TripAdvisor.

Click analysis by session

"Zero-click" sessions

Sessions with clicks to directories or publishers

Sessions with clicks to individual restaurant websites

Mobile
(46 total sessions)

Desktop
(54 total sessions)

In the current Google environment, consumers engage most with Google Business Profiles, individual restaurant websites, and TripAdvisor, with other aggregators collectively ranking a distant 4th.

Conclusion

The median consumer will almost always default to an engagement with the Local Pack if it's visible as part of their search experience. From that standpoint it would appear Google is still "self-preferencing."

Our research does not paint a picture of a competitive local search ecosystem within Google search results.

Google Business Profiles drove the majority of engagement (and ultimate restaurant choice) for our panel of Irish searchers, though restaurant sites were seen as a reliable source for menus and reservation availability. Mobile searchers were even less likely to exit the Google ecosystem to make their decision.

TripAdvisor was the only Aggregator to whom Google drove meaningful traffic, and most of this traffic came from traditional organic positions, not the Places Sites Refinement Chip or the Places Sites Aggregator Unit.

Google's demotion of traditional organic results and the Places Sites Aggregator Unit below its own Local Pack, and its aggressive introduction of a second Local Pack, make it difficult to argue it is in compliance with Section 6(5) of the Digital Markets Act.

This whitepaper was commissioned by the Tech Oversight Project, a U.S. based civil society organization charged with holding Big Tech accountable for its anti-competitive and corrupting influence on our society and the levers of power.

To achieve this, the Tech Oversight Project engages with key lawmakers and decision-makers to punch back against false narratives, expose bad actors in tech who are harming our country, and push for landmark antitrust legislation to restore competition and normalcy in our everyday lives.

Endnotes

1   https://developers.google.com/search/blog/2024/02/search-ex-periences-in-eea

2   Participants came from a relatively representative geographic sample of Ireland. The largest percentage (34%) of respondents came from Greater Dublin, with an additional 9% from Cork and 7% from Limerick. The rest came from a long tail of cities, towns, and counties.

We recognize that a sample of this size may limit the breadth of its applicability, and we're eager to expand our panel following the DMA compliance workshop in March 2024.

We also look forward to running a parallel study in the U.K. (whose search results lack many of the user interface elements Google intro-duced in response to the DMA) for additional insights and compari-sons.

3   The Local Finder is a Google Maps-like portal of local business-es entered by clicking the "More places" or "More businesses" button at the bottom of the Local Pack.

Expert Biographies

Mike Blumenthal

Co-founder · mblumenthal@nearmedia.co

Mike Blumenthal is a prominent figure in the local search and marketing space with two decades of experience.

As the co-founder of Near Media, he contributes valuable insights on local search trends via published analysis and contributions to the Near Memo podcast. He speaks at major conferences, and is a trusted source in media on local search and Google's dynamics.

His extensive background includes co-founding LocalU and GatherUp, organizations dedicated to improving local business visibility and customer experience. A survivor of the retail industry's evolution, Mike transitioned from a family business impacted by major retailers to a pioneer in local website promotion and an advocate for small businesses against digital giants.

David Mihm

Co-founder · dm@nearmedia.co

As a co-founder of Near Media, David advises clients and publishes analysis of local search dynamics. Known for his expertise in local SEO, David has been a sought-after speaker at major industry conferences.

David co-founded LocalU with Mike Blumenthal, and his career includes significant contributions as VP Product Strategy at ThriveHive (2018-2020) and as product architect of Moz Local after his venture, GetListed.org, was acquired by Moz in 2012. He also founded Tidings, an innovative email newsletter service acquired by DemandScience in 2021.

Beyond his professional endeavors, David supports diverse entrepreneurs through Prosper Portland's Mercatus program and as a past board member of MercyCorps Northwest and SEMpdx, Portland's search marketing organization, reflecting his commitment to local and digital marketing communities.

Greg Sterling

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Greg Sterling is one of the leading authorities on local digital marketing, location intelligence and the SME market. He's been engaged in online strategy, research, content development and event programming since 1998. He was the VP of Market Insights for Uberall and a former contributing editor for Search Engine Land, where he wrote for 14 years.

Sterling has spoken extensively at industry events for over 20 years. He founded The Place Conference, on location intelligence, in 2013. He also wrote the first analyst report on local search and its potentially disruptive impact on traditional media such as yellow pages in 2003. (At the time, the outcome wasn't a foregone conclusion.)

Before Uberall, Sterling was VP of Strategy for the Local Search Association. Prior to LSA, Sterling was an analyst, editor, and author at Opus Research, The Kelsey Group, Allbusiness.com and TechTV.