How verticalization and zero-click will impact local search in 2020

In a recent post on the SparkToro blog, Moz founder and search guru Rand Fishkin predicted that 2020 will be the year Google is transformed "from everyone's search engine to everyone's competitor." Fishkin cites Google's monopoly on web search and the trend toward zero-click searches, then outlines a dizzying range of examples to prove his case, from dictionaries like Merriam-Webster to lyrics sites like Genius, from news sites like USNews and FiveThirtyEight to travel sites like Expedia and Kayak … and the list goes on. Restaurant recommendations, weather, celebrity net worth, video games: just about every vertical you can think of has been impacted by a few related threads in Google's recent development:

- Featured answers
- Knowledge cards
- Verticalized search experiences
- Zero-click transactions (Reserve with Google)
- Transactions further down the funnel (Google Shopping, Google Travel)
- Carousels
- Local packs

All of these trends are related both technologically and strategically. From a technological perspective, they speak to the building out of the Knowledge Graph and the ubiquity of machine learning in just about everything Google touches in search. From a strategic point of view, along the lines of Fishkin's argument, Google is pushing every potentially minable source of information, including those that hope to generate commercial transactions, further into the margins, and occupying more and more of the center of the experience.

I want to share some thoughts about how all of this impacts local search, in ways that are very likely to expand in the coming year. My sense is that Google has looked very hard at the way consumers search within different types of verticals, from travel to shopping to restaurants to services and beyond, and has been tweaking the local search feature set subtly, in particular over the last year, but in some cases for much longer than that, to create ever more verticalized search experiences and own an ever-greater share of the funnel.

Google wants to do this in part because of the never-ending quest towards stickiness and protection against competition. In other words, Google wants to be the best local search engine in the world, and having more or less conquered the generic use cases, verticalization is an obvious next place to go. But of course, it's about more than that. In a scenario where the search engine succeeds beyond its wildest dreams, niche sites and directories that still serve significant margins of the population will simply be removed from the equation, leaving only Google to connect consumers with businesses.

Here are a few examples of the trend.

Retail shopping

This is a case where many subtle changes over time have coalesced into what is now a vastly different product search experience than Google has presented in years past. Google is much more likely now to indicate local availability of products, even when the search has no obvious local intent:

Further down the page for the same search, Google is essentially using the local listing as a conduit for customized presentation of content that meets the searcher's

needs. Note that the primary category of Target has been switched to “toy store” to help satisfy the searcher’s intent, and all three listings show that Google has mined data from the business website to determine relevance, making it unnecessary for the business to explicitly broadcast via Google My Business the availability of individual products:

Particularly with product searches, Google has also focused heavily in recent months on drilling into photo content and modifying the display of listings in order to feature photos that match specific search queries. As Mike Blumenthal has demonstrated, this seems to work especially well when searching for jewelry. In my example below, Google pulls photos of earrings from among the available photos in each listing and displays them prominently in the local pack. In the third listing, Google can even tell earrings are present in a photo that also contains other items.

Hotels

Fishkin talks about this as well, but I still think it’s worth discussing hotels specifically in the context of local, because of how dramatically hotel search has changed in comparison with other local categories. This year, the local pack became the “hotel pack.”

Though it looks similar to the local pack, the hotel pack is in reality a portal to a completely different search experience. You may recall that in late 2018, Google

introduced a new version of the Local Finder for hotels, with a greater number of filters and a nine-by-nine grid of hotel listings; that's already gone and replaced by the hotels section of Google Travel, which has hugely expanded the profile information available for each hotel:

Tabs in the hotel profile now include Prices, Reviews, Location, About, and Photos, with data including a much-expanded list of amenities compared to what was previously available in Google My Business, as well as recommendations of things to do in the area near the hotel and photos from the business, Google users, and third-party sources.

Restaurants

Here's a vertical with a long history of specialization. A very long history, if you remember back to the days of Hotpot and a range of other Google experiments designed to raise the profile of restaurants in search and capture traffic that might otherwise turn to Yelp or elsewhere for restaurant recommendations. That's not surprising given the popularity of restaurant search, which must have made it seem like low-hanging fruit to Google from the beginning. In fact, in a recent survey we conducted at Brandify (written about in Search Engine Land by Greg Sterling), we found that 84% of consumers have looked up a restaurant online in the last 30 days, far more than any other category of business.

Today, search for restaurants doesn't look dramatically different from generic search, but there are several subtle differences, including prominent photos of dishes. Restaurant local packs also include special filters for ratings, cuisine type, price, hours (planning ahead to see if they're open for brunch on Sunday), and "your past visits," where you can ask Google to reference your location history to only show you

restaurants you've been to before – or those you've never visited.

In addition, editorial descriptions, such as the line "Relaxed spot for traditional meals" in the listing for Divine Thai, are far more common for restaurants than any other non-chain listing, due to the dedicated efforts of Google's editorial team to build out that content and make restaurant search appear much more recommendation-oriented than other verticals.

Service-oriented businesses

Though Google has been steadily rolling out new features over the last couple of years for its Local Service Ads, such as the Google Guaranteed money-back program and the Google Screened license verification service, the initiative feels only half realized. Perhaps this is because so many verticals are still excluded from buying Local Service Ads – real estate agents, attorneys, and financial planners were added in 2019, augmenting a list that currently includes about 30 other business types such as locksmiths, plumbers, pet groomers, photographers, house cleaners, and pest control. Local Service Ads are also not available in all regions of the U.S., though coverage has been growing.

The user experience for Local Service Ads is somewhat anemic when compared with Google Shopping or Google Travel. When I search for "house cleaners anaheim ca" I see an ad carousel at the top of the screen, with a local pack right underneath competing for traffic. Compared to Google Hotels, I have much less of a clear incentive to choose the sponsored path:

Once I enter the Local Service Ads interface proper and select a business, I'm presented with a profile much simpler than that of the hotel example I shared above. If this is supposed to stand in for a business website, it's not particularly impressive.

Still, the very existence of Local Service Ads speaks to Google's interest in becoming the HomeAdvisor of the future, and I wouldn't be surprised to see a leap forward at some point where Google provides a more robust recommendation service, perhaps with a basic level that is free to businesses.

Today, service-oriented businesses are caught between having to pay for ads (if they qualify) or trying to rank alongside brick-and-mortar businesses in Google Maps and the local pack, which has traditionally been a huge challenge for them – no doubt one of the reasons service-oriented categories like locksmiths, garage door installers, and even attorneys have become notorious for listing spam.

Where is Google headed next?

Given the momentum Google is building around verticalized experiences, there's every likelihood that the company will continue to add more verticals to its roster in the coming year and beyond. In fact, a recent Think with Google report may provide a hint to the company's direction in this regard, given that it specifically calls out grocery, automotive and finance in a section called "Traditional industries are transforming with digital." Google notes that in the past two years, mobile searches for "grocery app" have increased 900%, mobile searches for "electric car(s)" have grown by 85%, and mobile searches for financial planning and management have grown by 70%. These are the kinds of demand signals a data-

driven company like Google surely looks to when determining where to build out new feature sets.

Speaking of mobile searches, verticalization is a curious case where desktop is actually out in front of mobile as a locus of innovation. Though, for instance, the mobile browser version of Google hotel search is more or less the same as desktop, all those extra tabs feel crowded in, and the search experience isn't as strong. And Google Maps – where much of the growth in local search is currently happening – still hasn't switched over to the new interface for hotels, constrained no doubt by the need to present a unified in-app experience. It will be especially interesting to see how Google balances the priority of verticalization against the growing popularity of Google Maps as the first choice among searchers.

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