



Consumer Survey on Search and Online Choice

Google | Portland

Methodology: a study of European consumers

Sample: 20,000 European online adults (18+) with 3,000 respondents per market in **Italy, France, Spain, Germany, Poland, and Netherlands** and 2,000 respondents in **Denmark**. Respondents are nationally representative by age, gender and region.

Fieldwork conducted: Wednesday 16th September to Wednesday 23rd of September 2020

Details (full methodology statement is [HERE](#))

- Nationally representative sample across age (18+) and gender (interlocked) and macro-region (NUTS 1 regions) through quota targets and weighting
- Data weighted by age (18+), gender and macro-region based on the most recent national census estimates in each country (from their national statistical authority)
- Sample monitored across countries for representativeness by market share of search

Portland adheres to the British Polling Council's rules of disclosure

Summary data tables are [HERE](#)



Within markets surveyed, this is the largest recent poll on search and online choice

This is the **largest recent study on this subject in the markets we surveyed**. It is larger than other consumer multi-market surveys:

Other multi-market studies of consumers published including a number of EU countries	Average sample per country in those surveyed in
Consumer Survey on Search and Online Choice (Portland - 2020)	2,858
Deloitte Consumer Trends 2020	1,570
McKinsey Consumer Sentiment 2020	1,158
Accenture Digital Consumer Survey 2020	1,072
Euromonitor Digital Consumer Survey 2020	1,000
Eurobarometer Competition Flashpoll 2019	1,000
PwC Consumer Insights Survey 2020	707

Consumers think they are getting significant benefits and enough choice



From the economy to staying connected during COVID-19, the public see Google bringing substantial benefits to their lives

- 77% believe that Google has had a positive impact on their non-professional/personal life, 77% on their life during COVID-19, 74% on their work life and 68% on their country's economy

Consumers have a wide range of choice to find information online. A majority first turn to specialised search engines and websites or apps to find information about shopping, flights and hotels. When they do use a general search engine, significant majorities find it easy to access third-party information

- Consumers use varied ways to find information online. A majority of 56% first turns to specialised search engines, websites or apps while only 28% start their search for flights, hotels or shopping on general search engines.
- The public say they find it easy to find third-party information when using search engines, such as information about news (72%), restaurants (71%), hotels (69%), flights (62%) and jobs (55%)

The public believe that they get these benefits within a competitive marketplace

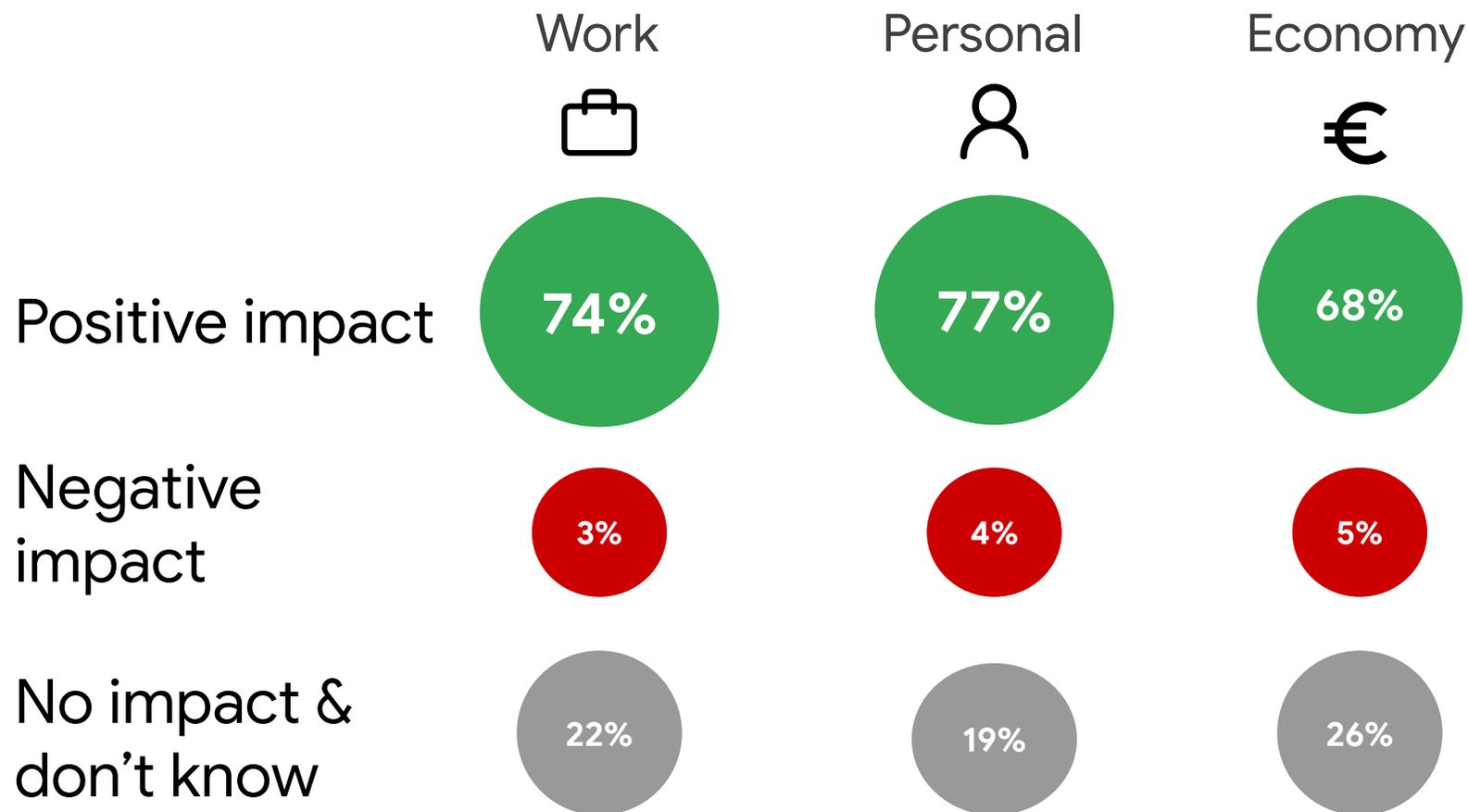
- 87% are satisfied with their choice of main search engine. 67% agree that it's easy to switch their main search engine/internet browser app, only 17% disagree
- When presented with a default search engine app they didn't like, 76% say they would switch away either through downloading a new app or through using a browser.



European consumers see Google bringing substantial benefits to their lives



The public feel that Google has had a positive impact on many aspects of their lives



Q. Overall, would you say Google and its products and services have had a positive or negative impact on your work life?

Q. Overall, would you say Google and its products and services have had a positive or negative impact on your non-professional/personal life?

Q. Overall, would you say Google and its products and services have had a positive or negative impact on the overall [country] economy?

Base size: 20,000 nationally representative sample.



Consumers have a wide range of choice when it comes to finding information online

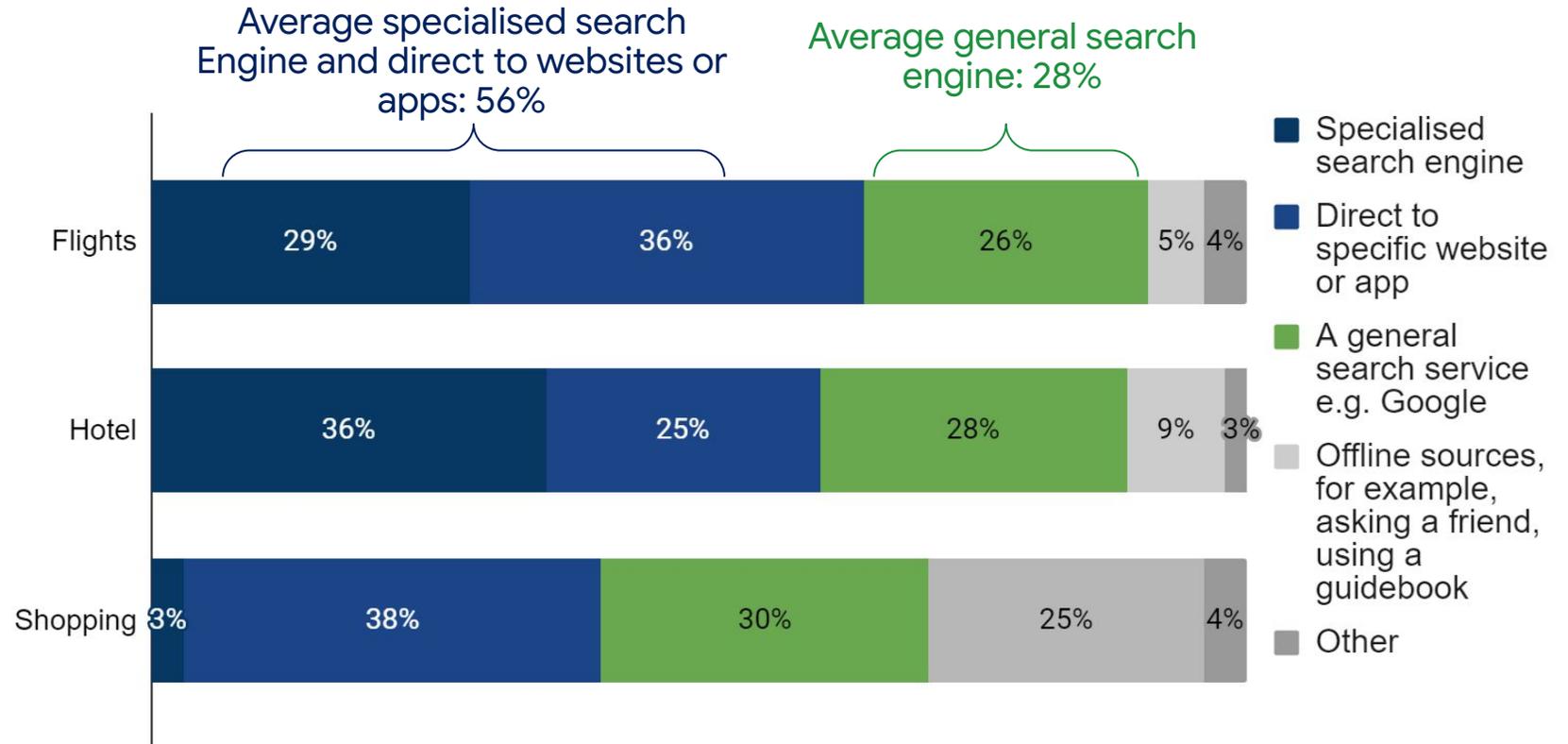


Where consumers turn first to look for information across three key verticals



A significant majority of users rely on specialised services or websites/apps to first look for information across these verticals.

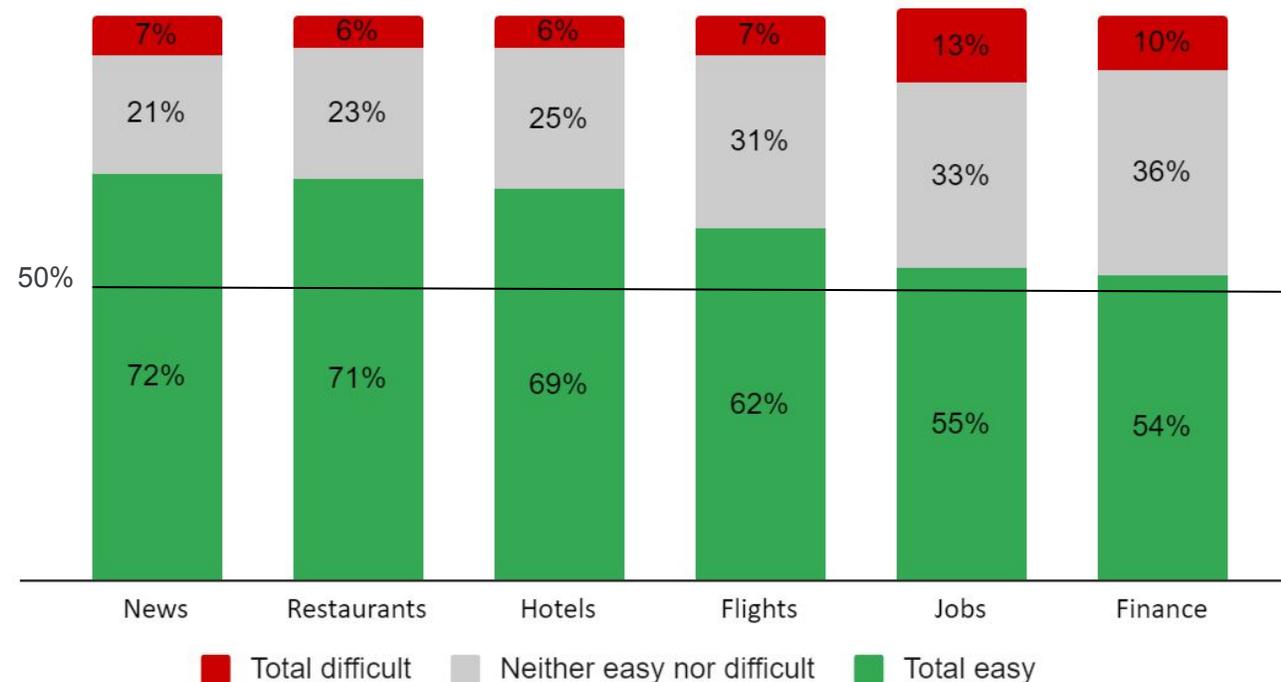
- For **flight** info, 65% turn to specialised services or websites/apps, 26% turn to general search engines
- For **hotel** info, 64% turn to specialised services or websites/apps, 28% turn to general search engines
- For **shopping** info, 41% turn to specialised services or websites/apps, 30% turn to general search engines



When searching the internet, significant majorities find it **easy** to access third-party information as opposed to information from that search engine



Ease of access to third-party information



Q. If you search for the following on the internet, how easy or difficult do you find it to access third-party / independent sources of information rather than information from that search engine's company?

Base size: 20,000 nationally representative sample.

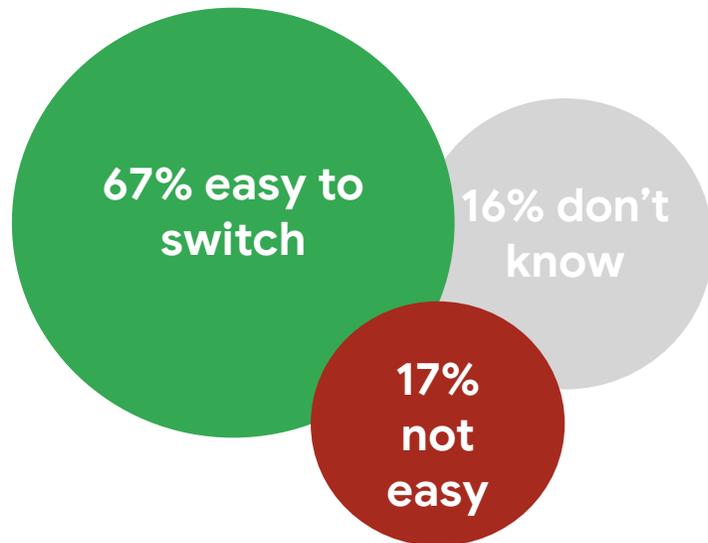
Fundamentally, Google operates in what consumers see as a lively and competitive marketplace



People are not constrained by default settings, they think they can easily switch away from defaults they don't like



Over two-thirds of the public believe they can easily switch from one search/internet browser app to another



If presented with a default search engine you didn't like....

44%
Download another app

23% would download another app and delete the default search engine
21% would download another app but keep the default search engine

32%
Use a different browser

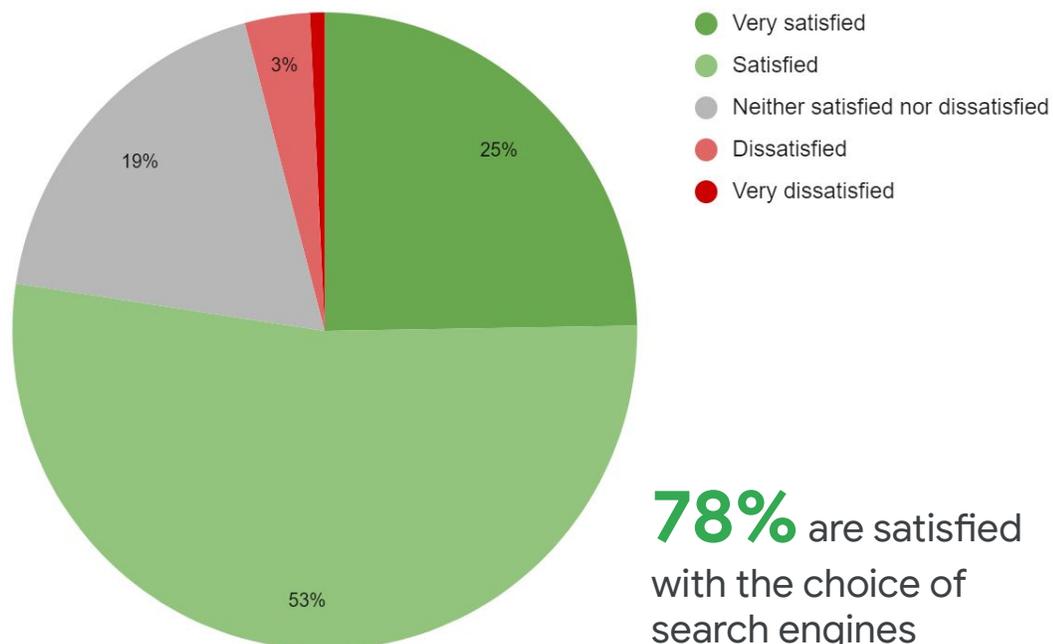
22% would use a different browser but keep the default search engine
10% would use a different browser and delete the default search engine

Q. Overall, do you feel you can easily switch from one search/ internet browser app to another on your mobile phone or not?
Q. If a new device came with a default internet search engine that you didn't like, what are you most likely to do?
Base size: 20,000 nationally representative sample.

Search engines: users are satisfied with the choice available and with the search engine they use the most

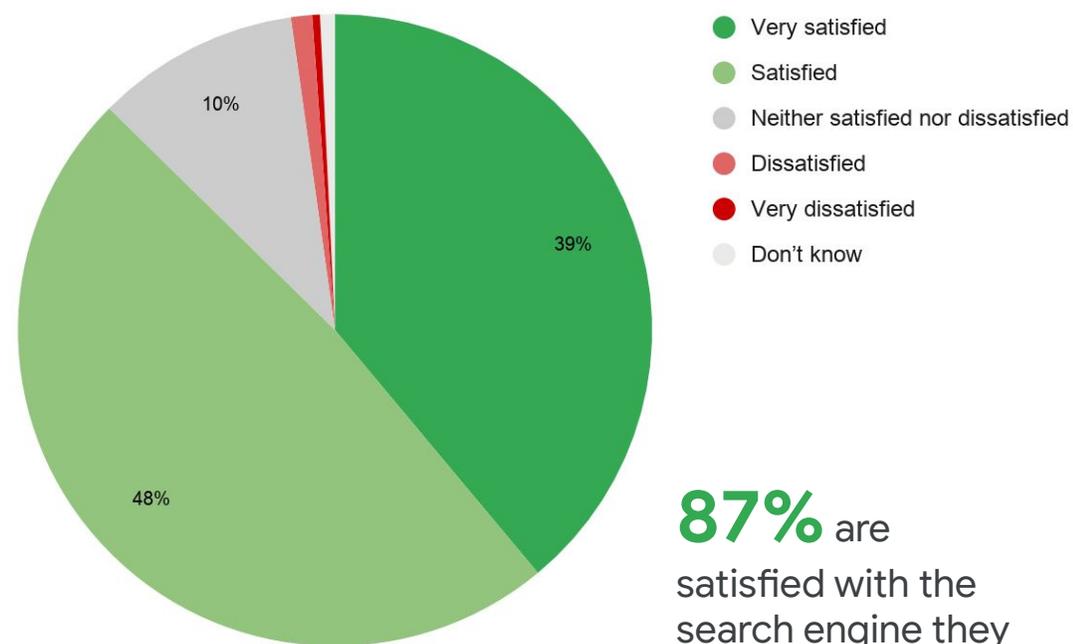


Satisfaction with choice of internet search engine



78% are satisfied with the choice of search engines available

Satisfaction with most commonly used internet search engine



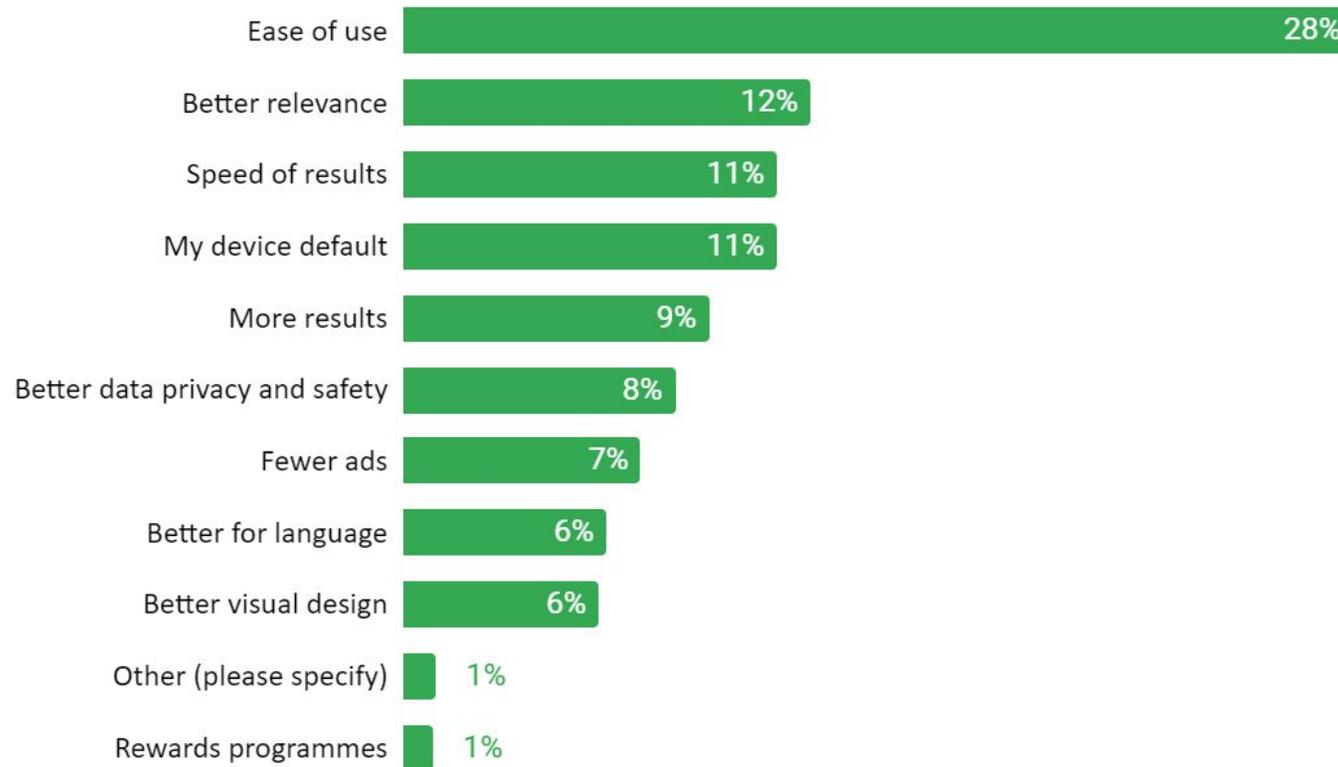
87% are satisfied with the search engine they use most often

Q. Overall, how satisfied or dissatisfied are you with the internet search engine you use most often?
Q. As a user, how satisfied or dissatisfied are you with the choice of search engines available on the internet?
Base size: 20,000 nationally representative sample.

Users are satisfied with their main search engine for the following reasons:



Main reasons for using current search engine



Statement consumers agreed with most:

“People want **quick access to information** to help them get things done **quickly and easily when they are online**”

Users would switch search engines for the following reasons:



Ease of use (user experience) (48%) and better data privacy and safety (38%) are the top two reasons that would persuade the public to shift search engine

