

# FLORIDA LOCAL SEARCH INDEX

What the websites behind Florida's top Google Maps listings actually have, and what four AI assistants tell Florida buyers to call. Measured by L3ad Solutions on October 15, 2026; every figure recomputes from its raw file on each build. No business is named.

6,296

GOOGLE LISTINGS READ

93

FLORIDA CITIES, 4 TRADES

2,000

SITES IN THE PAGESPEED SAMPLE

4,200

AI ANSWERS RECORDED, 13 CELLS

3.2 of 4

DIFFERENT NUMBER-ONE PICKS, AVG

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<https://l3adsolutions.com/research/florida-local-search-index>

## 1. SITE CHECK, STATEWIDE (OCTOBER 2026)

Our crawler opened every reachable website behind the top Google Maps listings for plumbers, HVAC companies, roofers and electricians in 93 Florida cities (372 city-and-trade cells, 6,296 listings, 5,471 with a website of their own, 86.9%). Shares are of reachable sites; unknowns are excluded from each denominator.

| SHARE OF TOP-LISTED BUSINESS WEBSITES                 | PLUMBERS<br>n 795 | HVAC<br>n 1,097 | ROOFERS<br>n 1,066 | ELECTRICIANS<br>n 836 |
|-------------------------------------------------------|-------------------|-----------------|--------------------|-----------------------|
| Website of their own (of listings)                    | 84.9%             | 87.7%           | 90.1%              | 84.3%                 |
| Loads over HTTPS                                      | 96.7%             | 96.1%           | 94.9%              | 93.7%                 |
| Mobile viewport set                                   | 95.4%             | 93.2%           | 89.9%              | 89.7%                 |
| LocalBusiness schema                                  | 52.3%             | 56.2%           | 50.3%              | 42.1%                 |
| Tap-to-call phone link                                | 84.8%             | 83.7%           | 79.6%              | 69.0%                 |
| Price published                                       | 12.1%             | 18.9%           | 10.3%              | 8.7%                  |
| Online booking                                        | 20.9%             | 22.8%           | 3.0%               | 12.9%                 |
| Blocks AI crawlers                                    | 1.1%              | 1.0%            | 0.9%               | 0.6%                  |
| PageSpeed mobile 70 or better (2,000-site sample)     | 33.6%             | 29.0%           | 24.1%              | 32.2%                 |
| LCP under 2.5 s (2,000-site sample)                   | 10.2%             | 7.0%            | 4.9%               | 8.1%                  |
| Median PageSpeed / median lab LCP (2,000-site sample) | 62 / 7.1 s        | 59 / 7.3 s      | 58 / 8.1 s         | 62 / 6.7 s            |

PageSpeed and LCP rows are a 2,000-site sample of the 5,471 sites with a website of their own; every other row counts every reachable site. Per trade the sample is plumbers 795 of 795 (every site), hvac 652 of 1,097, roofers 358 of 1,066, electricians 293 of 836; one PageSpeed run per site, so a single site can move 5 to 15 points between runs. Mobile is the viewport meta in the server HTML. Price published means a dollar amount beside a service word on the homepage or a pricing page; booking means a scheduler, not a generic button; both read low by design. Blocks AI crawlers means robots.txt disallows GPTBot, ClaudeBot or PerplexityBot.

## 2. SITE CHECK BY COUNTY (30-SITE FLOOR)

No single city reaches 30 sites from one Maps query, so the county is the first level that publishes. 10 to 12 of 28 counties clear the floor per trade; the rest feed only the statewide figure. PageSpeed rows are not published at county level (the sample is too small below the state).

### PLUMBERS: 10 COUNTIES AT 30 OR MORE SITES

| COUNTY       | SITES | HTTPS  | MOBILE | SCHEMA | TAP TO CALL | PRICE | BOOKING | BLOCKS AI |
|--------------|-------|--------|--------|--------|-------------|-------|---------|-----------|
| Brevard      | 55    | 98.1%  | 96.3%  | 66.7%  | 90.7%       | 9.3%  | 25.9%   | 1.9%      |
| Broward      | 146   | 95.7%  | 93.6%  | 53.2%  | 81.6%       | 9.9%  | 17.0%   | 2.2%      |
| Hillsborough | 43    | 100.0% | 97.7%  | 65.1%  | 90.7%       | 23.3% | 30.2%   | 0.0%      |
| Lee          | 45    | 100.0% | 95.5%  | 56.8%  | 90.9%       | 13.6% | 20.5%   | 2.6%      |
| Miami-Dade   | 77    | 87.5%  | 86.1%  | 38.9%  | 77.8%       | 15.3% | 18.1%   | 1.4%      |
| Orange       | 36    | 100.0% | 97.1%  | 64.7%  | 91.2%       | 8.8%  | 32.4%   | 0.0%      |
| Palm Beach   | 71    | 95.6%  | 95.6%  | 54.4%  | 80.9%       | 14.7% | 27.9%   | 0.0%      |
| Pinellas     | 60    | 96.4%  | 98.2%  | 51.8%  | 92.9%       | 16.1% | 25.0%   | 0.0%      |
| Sarasota     | 35    | 97.1%  | 97.1%  | 67.6%  | 88.2%       | 8.8%  | 20.6%   | 0.0%      |
| Seminole     | 32    | 96.7%  | 90.0%  | 56.7%  | 83.3%       | 13.3% | 40.0%   | 0.0%      |

### HVAC: 11 COUNTIES AT 30 OR MORE SITES

| COUNTY       | SITES | HTTPS | MOBILE | SCHEMA | TAP TO CALL | PRICE | BOOKING | BLOCKS AI |
|--------------|-------|-------|--------|--------|-------------|-------|---------|-----------|
| Brevard      | 90    | 97.8% | 97.8%  | 65.2%  | 89.9%       | 22.5% | 24.7%   | 0.0%      |
| Broward      | 184   | 94.0% | 92.2%  | 51.2%  | 78.3%       | 13.3% | 21.1%   | 3.6%      |
| Hillsborough | 58    | 98.1% | 88.7%  | 54.7%  | 79.2%       | 28.3% | 26.4%   | 0.0%      |
| Lee          | 49    | 97.8% | 93.5%  | 58.7%  | 87.0%       | 10.9% | 26.1%   | 0.0%      |
| Miami-Dade   | 106   | 94.7% | 88.4%  | 47.4%  | 67.4%       | 17.9% | 21.1%   | 0.0%      |
| Orange       | 57    | 94.3% | 92.5%  | 62.3%  | 71.7%       | 13.2% | 24.5%   | 0.0%      |
| Palm Beach   | 93    | 97.8% | 93.3%  | 60.7%  | 91.0%       | 23.6% | 25.8%   | 0.0%      |
| Pinellas     | 75    | 97.3% | 95.9%  | 58.9%  | 87.7%       | 23.3% | 38.4%   | 0.0%      |
| Polk         | 37    | 97.3% | 97.3%  | 70.3%  | 94.6%       | 13.5% | 18.9%   | 2.8%      |
| Sarasota     | 37    | 97.2% | 91.7%  | 69.4%  | 91.7%       | 27.8% | 22.2%   | 0.0%      |
| Seminole     | 50    | 97.8% | 95.7%  | 47.8%  | 87.0%       | 19.6% | 21.7%   | 0.0%      |

### ROOFERS: 12 COUNTIES AT 30 OR MORE SITES

| COUNTY       | SITES | HTTPS  | MOBILE | SCHEMA | TAP TO CALL | PRICE | BOOKING | BLOCKS AI |
|--------------|-------|--------|--------|--------|-------------|-------|---------|-----------|
| Brevard      | 92    | 98.9%  | 92.0%  | 55.7%  | 86.4%       | 11.4% | 3.4%    | 1.1%      |
| Broward      | 179   | 95.8%  | 92.8%  | 50.9%  | 78.4%       | 10.2% | 3.6%    | 0.0%      |
| Hillsborough | 57    | 96.2%  | 83.0%  | 47.2%  | 81.1%       | 18.9% | 0.0%    | 0.0%      |
| Indian River | 30    | 96.4%  | 100.0% | 42.9%  | 92.9%       | 14.3% | 0.0%    | 0.0%      |
| Lee          | 54    | 94.0%  | 84.0%  | 46.0%  | 72.0%       | 2.0%  | 4.0%    | 1.9%      |
| Miami-Dade   | 109   | 96.8%  | 92.6%  | 50.5%  | 81.1%       | 7.4%  | 4.2%    | 2.1%      |
| Orange       | 68    | 89.2%  | 84.6%  | 50.8%  | 76.9%       | 1.5%  | 0.0%    | 1.6%      |
| Palm Beach   | 81    | 93.5%  | 93.5%  | 51.9%  | 87.0%       | 14.3% | 0.0%    | 0.0%      |
| Pinellas     | 73    | 100.0% | 91.2%  | 50.0%  | 80.9%       | 8.8%  | 5.9%    | 1.4%      |
| Polk         | 33    | 100.0% | 93.5%  | 67.7%  | 90.3%       | 16.1% | 3.2%    | 0.0%      |
| Sarasota     | 35    | 97.1%  | 88.6%  | 45.7%  | 74.3%       | 11.4% | 5.7%    | 0.0%      |
| Seminole     | 67    | 90.5%  | 84.1%  | 41.3%  | 74.6%       | 11.1% | 1.6%    | 1.6%      |

#### ELECTRICIANS: 11 COUNTIES AT 30 OR MORE SITES

| COUNTY       | SITES | HTTPS | MOBILE | SCHEMA | TAP TO CALL | PRICE | BOOKING | BLOCKS AI |
|--------------|-------|-------|--------|--------|-------------|-------|---------|-----------|
| Brevard      | 58    | 92.6% | 88.9%  | 29.6%  | 68.5%       | 9.3%  | 11.1%   | 1.9%      |
| Broward      | 138   | 95.2% | 88.9%  | 37.3%  | 66.7%       | 10.3% | 10.3%   | 0.8%      |
| Hillsborough | 41    | 85.4% | 90.2%  | 56.1%  | 78.0%       | 7.3%  | 29.3%   | 0.0%      |
| Lee          | 51    | 93.9% | 89.8%  | 49.0%  | 73.5%       | 12.2% | 14.3%   | 0.0%      |
| Miami-Dade   | 74    | 92.8% | 87.0%  | 29.0%  | 69.6%       | 0.0%  | 7.2%    | 0.0%      |
| Orange       | 49    | 93.5% | 93.5%  | 52.2%  | 67.4%       | 17.4% | 21.7%   | 0.0%      |
| Palm Beach   | 76    | 92.9% | 87.1%  | 34.3%  | 67.1%       | 11.4% | 12.9%   | 1.5%      |
| Pinellas     | 58    | 98.2% | 89.3%  | 37.5%  | 75.0%       | 14.3% | 21.4%   | 0.0%      |
| Polk         | 34    | 96.9% | 90.6%  | 40.6%  | 87.5%       | 15.6% | 12.5%   | 0.0%      |
| Sarasota     | 32    | 90.3% | 87.1%  | 54.8%  | 71.0%       | 6.5%  | 19.4%   | 3.2%      |
| Seminole     | 37    | 97.0% | 90.9%  | 57.6%  | 63.6%       | 15.2% | 27.3%   | 0.0%      |

### 3. AI ANSWER PANEL, Q4 2026

Five buyer-intent prompts per trade (best, emergency with reviews, who to call for one service, upfront pricing, top-rated in the county), with the city or county written into the prompt, run through the vendors' APIs with web search on: ChatGPT (gpt-4.1-mini), Gemini (gemini-2.5-flash, Google Search grounding) and Claude (claude-haiku-4-5) 15 times per prompt, Perplexity (sonar) 20 times (15 in the Melbourne pilot). 4,200 answers in 13 cells across 5 metros, 0 errors. A business counts once per answer; mention rate = answers naming it / the engine's answers, Wilson 95% interval. Openness = 100 minus the share of all mentions taken by the three most-named businesses, pooled over the four engines.

- **Agreement:** 3.2 different number-one picks per cell on average; all four differed in 5 of 13 cells; all four agreed in 0; one business sat in every engine's top three in 4.
- **Leader strength:** the most-named business averages 68% of Gemini's answers, 57% of ChatGPT's, 50% of Claude's and 38% of Perplexity's.
- **Openness:** the three most-named took 16.7% of all mentions on average (openness 75 to 89.1); 84 to 228 different businesses named per cell.

- **Naming:** ChatGPT, Gemini and Perplexity named a business in every answer; Claude in 92% on average (83% at the low end), abstaining most on the upfront-pricing prompt.
- **Sources:** 57% of Perplexity's cited links point at a business's own site and 23% at directories or review platforms; Gemini 70% business sites; Claude 53%; ChatGPT cited only Google Maps links.
- **Stability:** 5 of 13 cells held every engine under a 5-point drift; Gemini moved in 5 cells and Perplexity in 4, marked † below.

## A. AGREEMENT AND OPENNESS

| CITY AND TRADE             | ANSWERS | NUMBER-ONE PICKS (OF 4)          | STRONGEST LEADER (95% CI)             | OPENNESS | BUSINESSES NAMED | CLAUDE NAMED A BUSINESS | PERPLEXITY CITES BUSINESS SITES |
|----------------------------|---------|----------------------------------|---------------------------------------|----------|------------------|-------------------------|---------------------------------|
| Melbourne plumbers (pilot) | 300     | 4                                | Gemini 76%<br>65 to 84                | 81.7     | 84               | 97.3%                   | 66.9%                           |
| Orlando plumbers           | 325     | 3                                | Gemini 54.7% <sup>†</sup><br>43 to 65 | 85.3     | 200              | 97.3%                   | 54.0%                           |
| Orlando hvac               | 325     | 4                                | Gemini 56%<br>45 to 67                | 89.1     | 228              | 92.0%                   | 67.9%                           |
| Orlando roofers            | 325     | 4                                | Gemini 58.7%<br>47 to 69              | 89.1     | 225              | 85.3%                   | 56.9%                           |
| Tampa plumbers             | 325     | 3<br>one business in every top 3 | Gemini 80% <sup>†</sup><br>70 to 88   | 83.7     | 143              | 94.7%                   | 49.2%                           |
| Tampa hvac                 | 325     | 4<br>one business in every top 3 | Gemini 66.7%<br>55 to 76              | 84.4     | 193              | 86.7%                   | 60.4%                           |
| Tampa roofers              | 325     | 3                                | Gemini 77.3%<br>67 to 85              | 84.7     | 175              | 90.7%                   | 58.7%                           |
| Jacksonville plumbers      | 325     | 2                                | Gemini 64%<br>53 to 74                | 83.0     | 122              | 97.3%                   | 50.1%                           |
| Jacksonville hvac          | 325     | 3                                | ChatGPT 64%<br>53 to 74               | 82.3     | 145              | 92.0%                   | 64.1%                           |
| Jacksonville roofers       | 325     | 2                                | ChatGPT 100%<br>95 to 100             | 75.0     | 128              | 96.0%                   | 62.9%                           |
| Miami plumbers             | 325     | 4                                | ChatGPT 84%<br>74 to 91               | 80.8     | 109              | 93.3%                   | 44.6%                           |
| Miami hvac                 | 325     | 2<br>one business in every top 3 | Gemini 70.7% <sup>†</sup><br>60 to 80 | 82.8     | 165              | 82.7%                   | 48.7%                           |
| Miami roofers              | 325     | 3<br>one business in every top 3 | Gemini 76% <sup>†</sup><br>65 to 84   | 80.9     | 183              | 88.0%                   | 56.7%                           |

## B. MOST-NAMED BUSINESS PER ENGINE: MENTION RATE AND 95% INTERVAL

| CITY AND TRADE                                       | CHATGPT           | GEMINI                         | CLAUDE            | PERPLEXITY                   |
|------------------------------------------------------|-------------------|--------------------------------|-------------------|------------------------------|
| <b>Melbourne plumbers</b><br>n 75 / 75 / 75 / 75     | 60%<br>49 to 70   | 76%<br>65 to 84                | 49.3%<br>38 to 60 | 48% <sup>†</sup><br>37 to 59 |
| <b>Orlando plumbers</b><br>n 75 / 75 / 75 / 100      | 41.3%<br>31 to 53 | 54.7% <sup>†</sup><br>43 to 65 | 38.7%<br>29 to 50 | 39%<br>30 to 49              |
| <b>Orlando hvac</b><br>n 75 / 75 / 75 / 100          | 44%<br>33 to 55   | 56%<br>45 to 67                | 49.3%<br>38 to 60 | 34% <sup>†</sup><br>26 to 44 |
| <b>Orlando roofers</b><br>n 75 / 75 / 75 / 100       | 32%<br>23 to 43   | 58.7%<br>47 to 69              | 36%<br>26 to 47   | 30%<br>22 to 40              |
| <b>Tampa plumbers</b><br>n 75 / 75 / 75 / 100        | 58.7%<br>47 to 69 | 80% <sup>†</sup><br>70 to 88   | 52%<br>41 to 63   | 39% <sup>†</sup><br>30 to 49 |
| <b>Tampa hvac</b><br>n 75 / 75 / 75 / 100            | 62.7%<br>51 to 73 | 66.7%<br>55 to 76              | 54.7%<br>43 to 65 | 28%<br>20 to 38              |
| <b>Tampa roofers</b><br>n 75 / 75 / 75 / 100         | 57.3%<br>46 to 68 | 77.3%<br>67 to 85              | 41.3%<br>31 to 53 | 23% <sup>†</sup><br>16 to 32 |
| <b>Jacksonville plumbers</b><br>n 75 / 75 / 75 / 100 | 40%<br>30 to 51   | 64%<br>53 to 74                | 48%<br>37 to 59   | 50%<br>40 to 60              |
| <b>Jacksonville hvac</b><br>n 75 / 75 / 75 / 100     | 64%<br>53 to 74   | 60%<br>49 to 70                | 46.7%<br>36 to 58 | 35%<br>26 to 45              |
| <b>Jacksonville roofers</b><br>n 75 / 75 / 75 / 100  | 100%<br>95 to 100 | 88% <sup>†</sup><br>79 to 94   | 65.3%<br>54 to 75 | 41%<br>32 to 51              |
| <b>Miami plumbers</b><br>n 75 / 75 / 75 / 100        | 84%<br>74 to 91   | 60%<br>49 to 70                | 76%<br>65 to 84   | 36%<br>27 to 46              |
| <b>Miami hvac</b><br>n 75 / 75 / 75 / 100            | 40%<br>30 to 51   | 70.7% <sup>†</sup><br>60 to 80 | 41.3%<br>31 to 53 | 49%<br>39 to 59              |
| <b>Miami roofers</b><br>n 75 / 75 / 75 / 100         | 62.7%<br>51 to 73 | 76% <sup>†</sup><br>65 to 84   | 48%<br>37 to 59   | 43%<br>34 to 53              |

<sup>†</sup> settling; the engine's top-3 rate moved 5 points or more between the first 60% of its runs and the full sample; read the interval. ChatGPT returned the same list on every run of a prompt, so its rates step in multiples of 20%. The business behind each rate is an id in the raw file and is not published.

C. BY ENGINE, AVERAGED OVER THE 13 CELLS

| ENGINE     | LEADER MENTION RATE (RANGE) | ANSWERS NAMING A BUSINESS | CITES BUSINESS SITES | CITES DIRECTORIES | SETTLING CELLS | ANSWERS PER CELL |
|------------|-----------------------------|---------------------------|----------------------|-------------------|----------------|------------------|
| ChatGPT    | 57% (32 to 100)             | 100%                      | 0%                   | 100%              | 0              | 75               |
| Gemini     | 68% (55 to 88)              | 100%                      | 70%                  | 12%               | 5              | 75               |
| Claude     | 50% (36 to 76)              | 92% (83% low)             | 53%                  | 31%               | 0              | 75               |
| Perplexity | 38% (23 to 50)              | 100%                      | 57%                  | 23%               | 4              | 75 to 100        |

4. METHOD, LIMITS AND CHANGELOG

**v1, July 2026.** One Google Places text search per city and trade (93 cities, 12 trades, top 20 listings): review counts, rating floors, established rivals, schema on three top-ranked sites. Kept as unnamed market context.

**v2, October 2026.** Adds the site check (our crawler, every website behind the top listings for 4 trades) and the AI answer panel (4,200 answers, intervals, stability check). Perplexity joins; Grok leaves. Figures with no field in a raw file were retired on October 15, 2026 and every published number now has a row in the claims register (data/flsi/v2/claims.json) that is recomputed on each build.

**Held back this edition.** The city mix-up rate (a business named for the wrong metro) until the location classifier handles multi-branch companies; county PageSpeed shares until a median-of-three pass; any business name from the AI answers.

**Limits.** API answers are a snapshot and can differ from the consumer apps; one fixed run location; Places returns up to 20 listings per query and fewer in smaller cities; the crawler reads server HTML only (script-injected schedulers are missed); PageSpeed is one run per site. Listings are stored as place ids; no business name, address or review is stored or published (Google Maps Platform Terms 3.2.3).

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