

Battle of the Brands: Big Brands vs. Main Street

Methodology and data summary

Clixera research, Ottawa and Toronto, 2026. Page: clixera.ca/research/battle-of-brands-ottawa-toronto-2026 (staging draft).

1. What was compared

AI model: ChatGPT (OpenAI). Each question was asked three times. Google Maps: one list of local results per question (up to 10 places, ranked).

Collection date: not recorded in the dataset (no timestamps in records.jsonl). Indirect evidence: the newest Google Maps build ID found inside links cited by ChatGPT is 2026-10-13, so collection was probably on or after that date. This is an inference, not a recorded date.

Location settings: not recorded. Every question named the neighbourhood (or a nearby street) and city in its text.

2. Question set

5,088 questions = 106 BIAs × 12 categories (coffee, pizza, burgers, hardware, pharmacy, gyms, hair, dental, optical, grocery, sandwiches/bakeries, real estate) × 4 question styles:

- T1 best: “What is the best [category] in [BIA], [City]?”
- T2 near: “Where should I go for [category] near [street or intersection] in [City]?”
- T3 local: “Can you recommend a local [category] in [BIA], [City]?”
- T4 control: “I am in [BIA], [City]. Which [category] should I go to?”

The full question list is in the source data; a separate question-set file was not supplied.

3. Counts

Item	Count
Questions asked	5,088
Excluded: no Google Maps results	327
Excluded: missing a ChatGPT answer	1
Questions used	4,760
Google Maps lists used	4,760
ChatGPT answers collected (used questions)	14,280
ChatGPT answers naming no business (left out)	77
ChatGPT answers used	14,203

4. Classification and matching

Business names were taken from ChatGPT answer headings and bold list items in order (rank = order), and from Maps place titles. Each name was classed as chain, independent or unknown using, in order: a 78-brand national list; franchise and regional chain names; brand names with 3+ locations in a list of about 19,500 businesses in these BIAs; exact, branch-stripped and fuzzy (token_sort ≥ 92) matches to that list; names at 3+ distinct addresses in the data; websites cited in ChatGPT sources; and names already classed on Maps. **A chain is a brand with 3 or more locations.**

Unknown share: ChatGPT 37.4% of names (was 41.7%), Maps 40.2% (was 43.3%).

Unknown sample: 200 random unknown mentions (100 per platform) were checked by hand, with web lookups where unclear. 12 were chains (6.0%, Wilson 95% CI 3.5–10.2%), 6 were not businesses, 182 were independents. Chain shares spread unknowns using these rates.

5. Headline: recommendation gap

Unit: ChatGPT answers unless stated. “Missing” = no name in that answer’s top 3 matches Google Maps’ #1.

Main rule: same name after removing branch or location words (exact, token_set ≥ 90, or shared 6+ character prefix); a different branch of the same chain counts as a match. **Strict rule:** full names including branch words must match (token_sort ≥ 90). The headline uses the main rule because it gives the smaller, more cautious gap.

Scope · metric	Value	95% CI	n	Unit
all · missing_perAnswer_allAnswers	60.6%	57.7–63.5	14,203	ChatGPT answers (up to 3 per question)
all · missing_firstAnswer	60.4%	57.4–63.2	4,760	questions (first ChatGPT answer only)
all · missing_randomSingleAnswer	60.8%	57.6–63.6	4,760	questions (one randomly chosen ChatGPT answer)
all · missing_allThreeAnswers	52.4%	49.3–55.5	4,760	questions (absent from every answer)
all · sameNumber1_perAnswer	23.2%	21.1–25.5	14,203	ChatGPT answers
Ottawa · missing_perAnswer_allAnswers	46.1%	40.5–51.8	2,666	ChatGPT answers (up to 3 per question)
Ottawa · missing_firstAnswer	46.1%	40.5–52.4	894	questions (first ChatGPT answer only)
Ottawa · missing_randomSingleAnswer	46.5%	40.1–53.0	894	questions (one randomly chosen ChatGPT answer)
Ottawa · missing_allThreeAnswers	37.7%	31.8–43.8	894	questions (absent from every answer)
Ottawa · sameNumber1_perAnswer	33.5%	29.0–37.8	2,666	ChatGPT answers
Toronto · missing_perAnswer_allAnswers	64.0%	60.8–67.1	11,537	ChatGPT answers (up to 3 per question)
Toronto · missing_firstAnswer	63.7%	60.4–67.0	3,866	questions (first ChatGPT answer only)
Toronto · missing_randomSingleAnswer	64.0%	60.7–67.4	3,866	questions (one randomly chosen ChatGPT answer)
Toronto · missing_allThreeAnswers	55.8%	52.4–59.2	3,866	questions (absent from every answer)
Toronto · sameNumber1_perAnswer	20.8%	18.6–23.2	11,537	ChatGPT answers
maps1Independent · missing_perAnswer_allAnswers	62.6%	59.6–65.7	10,937	ChatGPT answers (up to 3 per question)
maps1Independent · missing_firstAnswer	62.6%	59.6–65.9	3,668	questions (first ChatGPT answer only)
maps1Independent · missing_randomSingleAnswer	62.5%	59.3–65.7	3,668	questions (one randomly chosen ChatGPT answer)
maps1Independent · missing_allThreeAnswers	54.6%	51.2–58.1	3,668	questions (absent from every answer)
maps1Independent · sameNumber1_perAnswer	21.3%	19.2–23.5	10,937	ChatGPT answers
maps1Chain · missing_perAnswer_allAnswers	53.9%	48.8–58.6	3,266	ChatGPT answers (up to 3 per question)
maps1Chain · missing_firstAnswer	52.9%	47.7–58.2	1,092	questions (first ChatGPT answer only)
maps1Chain · missing_randomSingleAnswer	54.9%	49.2–60.0	1,092	questions (one randomly chosen ChatGPT answer)
maps1Chain · missing_allThreeAnswers	45.3%	40.4–50.3	1,092	questions (absent from every answer)

maps1Chain · sameNumber1_perAnswer	29.5%	25.2–34.1	3,266	ChatGPT answers
STRICT · all · missing_perAnswer_allAnswers	69.8%	67.1–72.4	14,203	ChatGPT answers (up to 3 per question)
STRICT · all · missing_firstAnswer	69.8%	67.1–72.5	4,760	questions (first ChatGPT answer only)
STRICT · all · missing_randomSingleAnswer	70.1%	67.2–72.8	4,760	questions (one randomly chosen ChatGPT answer)
STRICT · all · missing_allThreeAnswers	62.5%	59.5–65.5	4,760	questions (absent from every answer)
STRICT · all · sameNumber1_perAnswer	17.8%	15.9–19.9	14,203	ChatGPT answers
STRICT · Ottawa · missing_perAnswer_allAnswers	61.0%	55.4–66.5	2,666	ChatGPT answers (up to 3 per question)
STRICT · Ottawa · missing_firstAnswer	60.5%	54.8–66.5	894	questions (first ChatGPT answer only)
STRICT · Ottawa · missing_randomSingleAnswer	61.1%	55.2–66.7	894	questions (one randomly chosen ChatGPT answer)
STRICT · Ottawa · missing_allThreeAnswers	53.2%	47.1–59.4	894	questions (absent from every answer)
STRICT · Ottawa · sameNumber1_perAnswer	25.1%	21.1–29.7	2,666	ChatGPT answers
STRICT · Toronto · missing_perAnswer_allAnswers	71.8%	68.7–74.8	11,537	ChatGPT answers (up to 3 per question)
STRICT · Toronto · missing_firstAnswer	72.0%	68.8–75.1	3,866	questions (first ChatGPT answer only)
STRICT · Toronto · missing_randomSingleAnswer	72.2%	69.0–75.2	3,866	questions (one randomly chosen ChatGPT answer)
STRICT · Toronto · missing_allThreeAnswers	64.6%	61.1–68.0	3,866	questions (absent from every answer)
STRICT · Toronto · sameNumber1_perAnswer	16.1%	13.9–18.3	11,537	ChatGPT answers

6. Listed independents never named

Plain summary: We checked 5,135 listed independents for exact name matches, then added looser matches only at the rate our hand check found real.

Denominator: every independent business on Clixera's list of businesses in the 106 BIAs, in the 12 study categories (Ottawa 1,145; Toronto 3,990). Chains (3+ locations) are excluded.

Adjustment: adjusted named share = strict named share + precision × (loose named share – strict named share). Never named = 100% – adjusted named share. The range comes from the 95% CI of precision (Wilson) combined with the strict and loose bounds.

Unit: listed independent businesses in the 12 categories (5,135). “Named” = the same name appears in any ChatGPT answer or Maps list in that city. Strict exact matching misses real mentions, so it overstates “never named.” Loose fuzzy matching overstates matches: a hand check of 60 loose-only matches found 34 real (57%, 95% CI 44–68%). The adjusted estimate corrects for that.

Scope	Adjusted	Adjusted range	Strict (upper bound)	Loose (lower bound)	n
allAnswers · all	50.6%	48.1–53.3	62.8%	41.3%	5,135
allAnswers · Ottawa	53.2%	51.3–55.3	62.7%	46.0%	1,145
allAnswers · Toronto	49.9%	47.2–52.8	62.9%	40.0%	3,990
firstAnswer · all	53.1%	50.6–55.8	65.2%	43.9%	5,135
firstAnswer · Ottawa	55.3%	53.3–57.5	65.3%	47.7%	1,145
firstAnswer · Toronto	52.5%	49.9–55.3	65.2%	42.8%	3,990

7. Chains compared with the street

Expected chain share = share of listed businesses in the category that are chains. Ratio = top 3 chain share ÷ expected. 95% CIs: two-stage cluster bootstrap (BIAs, then questions), 1,000 draws, redrawing the unknown-sample rates; listed share held fixed.

Category	Listed chains	Listed n	ChatGPT top 3 chains	ChatGPT ratio (CI)	Maps top 3 chains	Maps ratio (CI)
burgers	60.4%	432	20.9%	0.35 (0.29–0.42)	17.5%	0.29 (0.24–0.35)
coffee	37.3%	1,154	10.7%	0.29 (0.22–0.39)	9.0%	0.24 (0.18–0.34)
dental	0.8%	591	3.1%	3.72 (1.92–7.24)	6.0%	7.14 (4.35–11.2)
grocery	29.5%	982	61.2%	2.07 (1.89–2.25)	50.8%	1.72 (1.55–1.92)
gyms	24.6%	334	38.0%	1.55 (1.36–1.79)	40.2%	1.64 (1.43–1.88)
hair	2.0%	1,665	3.7%	1.86 (1.0–3.72)	9.8%	4.95 (3.52–7.04)
hardware	63.7%	102	57.7%	0.9 (0.82–0.99)	39.7%	0.62 (0.56–0.7)
optical	22.5%	222	22.1%	0.98 (0.81–1.21)	31.6%	1.4 (1.16–1.68)
pharmacy	54.1%	460	52.0%	0.96 (0.89–1.05)	51.2%	0.95 (0.85–1.06)
pizza	48.1%	418	17.3%	0.36 (0.28–0.46)	18.8%	0.39 (0.31–0.49)
real_estate	36.6%	183	14.6%	0.4 (0.31–0.56)	21.9%	0.6 (0.48–0.78)
sandwich_bakery	39.2%	510	4.9%	0.12 (0.08–0.19)	8.6%	0.22 (0.16–0.31)

8. Iconic brands

Brand	Category	Share of listed	ChatGPT top 3 per 100 answers (CI)	Maps top 3 per 100 lists (CI)
Tim Hortons	coffee	16.6%	1.1 (0.2–2.5)	0.0 (0.0–0.0)
Starbucks	coffee	8.1%	1.3 (0.2–2.8)	0.2 (0.0–1.0)
McDonald's	burgers	10.6%	0.0 (0.0–0.0)	0.0 (0.0–0.0)

8b. City weighting

Combined figures pool all answers. Toronto supplies 11,537 of 14,203 ChatGPT answers (81%); Ottawa 2,666. The cities are **not** weighted equally, so the combined 61% sits close to Toronto's 64%. Ottawa on its own is 46%. A city-equal average would be about 55%; it is not used as a headline.

9. Robustness: first ChatGPT answer only

Finding	Unit	All answers	First answer	First-answer CI
Maps' #1 missing from ChatGPT's top 3	% of answers	60.6	60.4	57.4–63.2
ChatGPT's #1 is Maps' #1	% of answers	23.2	—	—
ChatGPT top-3 picks not in Maps top 3	% of picks	68.4	68.3	66.0–70.7
Listed independents never named (adjusted)	% of 5,135	50.6	53.1	50.6–55.8
Estimated chain share, ChatGPT top 3	%	26.3	26.2	25.3–28.3
Grocery chains vs listed mix (ChatGPT)	ratio ×	2.07	2.07	1.89–2.26
Gyms chains vs listed mix (ChatGPT)	ratio ×	1.55	1.58	1.39–1.83
Coffee chains vs listed mix (ChatGPT)	ratio ×	0.29	0.27	0.19–0.37
Home Depot: ChatGPT minus Maps	per 100 questions in category	22.5	22.2	15.5–29.3
RONA: ChatGPT minus Maps	per 100 questions in category	10.8	11.8	4.6–18.5
Rexall: ChatGPT minus Maps	per 100 questions in category	-21.3	-20.9	-27.9–13.7
GoodLife: ChatGPT minus Maps	per 100 questions in category	-14.8	-14.9	-23.6–6.8

10. Caveats

- The headline counts ChatGPT answers (14,203), not questions. Per question, Maps' #1 was missing from all three answers 52% of the time.
- Point-in-time snapshot; answers vary with wording and time.
- Collection date and location settings not recorded.
- Unknown names remain about 37–40%; the sample-based adjustment carries its own uncertainty.

- Real estate agents count on their own unless their listing names a brokerage.
- Answers can name businesses outside a BIA.
- Results cover 106 Ottawa and Toronto BIAs and the questions tested. They do not describe all of Canada.
- The study does not measure how many people use ChatGPT or Google Maps, or any effect on customers.