

Search_



Secret Life of Search



10 Stand-out Strategies
for Search Success

REDC

RESEARCH & ANALYTICS

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Contents

| | |
|---|----------------|
| Introduction | page 4 |
| Executive Summary | page 5 |
| 10 Stand-out Strategies for Search Success | page 7 |
| #1 Brand Trust | page 8 |
| Build brand familiarity to win more clicks on Google | |
| #2 Click Persuasion | page 11 |
| Capture attention in open-minded searches | |
| #3 Searchability | page 14 |
| Win clicks from beyond the top-of-page | |
| #4 Shopability | page 19 |
| Harness the influential impact of Google Shopping | |
| #5 Mapability | page 23 |
| Exploit map-based search for geo-searchers | |
| #6 Position Zero | page 26 |
| Master Featured Snippets for SERP result stand-out | |
| #7 Show and Tell | page 29 |
| Work your imagery to inspire visual searchers | |
| #8 Getting Ahead | page 32 |
| Pick up clicks early in the purchase funnel | |
| #9 Copy Magic | page 35 |
| Use great copy to earn eyeballs and clicks | |
| #10 Downstreaming | page 38 |
| Gain attention in aggregator-dominated search results | |
| Conclusion | page 41 |
| Methodology | page 42 |
| About Red C | page 44 |

Introduction

The rapid evolution of search engines and search technology is leading to profound changes in the ways that consumers explore, discover and buy new products and services online. This is causing immense headaches for search marketers striving to keep their brands visible on the new Digital High Street - the Google Search Results Page.

When, earlier this year, we looked around for information beyond the analytics data to help us understand how consumer search behaviour was evolving in response to this digital upheaval, **we found very little independent research evidence. So we resolved to plug the gap ourselves.**

Over a two-month period, we interviewed more than 60 consumers from a range of lifestages, and eye tracked them completing over 400 search tasks. These ranged from looking for a luxury hotel in London for a special weekend to finding a good deal on car insurance...from sourcing new family meal ideas to discovering a nearby physiotherapist.

The result?

A priceless database of video and interview data that unlocks the secrets of how consumers are using the web – and specifically the Google SERP – to view, browse and sift through search results to assist them in their purchase journeys. We believe it is the biggest, most comprehensive and up-to-date study of its kind in the market.

Welcome to The Secret Life of Search.



Adrian Rowe
October 2018

Executive Summary

Our study uncovered ten stand-out strategies for search success – techniques and tactics to give search marketers a competitive edge. While success factors varied across different product search tasks, as Google responds to different types of search with a range of features – offering Maps in response to geo-searches, for example – many of the factors evidenced here are relevant, or can be adapted, regardless of market sector.

#1 Brand Trust

Most consumers in our study – across a wide range of search tasks – chose a **familiar, trusted, authoritative brand** for their first click on the Google SERP. They already had a brand in mind when performing the search. Getting first clicks is not just about bought and earned rankings – **it's about building brand credibility in your whole omnichannel marketing strategy.**

#2 Click Persuasion

When consumers are searching for a new product or service, they adopt a **more considered and open approach** to the search task. Search marketing techniques can really pay off here. **Copy content, imagery and search rankings all influence behaviour** and win clicks.

#3 Searchability

In competitive sectors, winning clicks from beyond the top-of-page is about exploiting the growing number of alternative features that attract searcher attention. **Emotional engagement plays an influential role** in search intent. And on **mobile devices**, we saw more clicks happening further down the page, as **searchers are less 'spatially aware'.**

#4 Shopability

Google Shopping punches above its weight in ecommerce searches, influencing other clicks by helping searchers to decide on the type or style of product early in the purchase funnel, and **driving click-assisted and impression-assisted conversions.**

#5 Mapability

Around one in five of our search tasks brought up a Google Map in the SERP. Where this occurred, **respondents adopted a different search behaviour**, dragging and zooming the map, studying reviews, ratings, prices and the Google My Business snapshot. **Google Maps offers consumers an advanced, visual search strategy.**

Executive Summary

#6 Position Zero

Google is already accommodating the fast-growing adoption by consumers of **voice search technology** with the introduction of **Featured Snippets and People Also Ask** features on the search interface, depending on search intent. There is a compelling case for marketers to **focus significant effort on capturing these valuable – and well-liked – Position Zero elements.**

#7 Show and Tell

One in seven of our respondents' first clicks went to a Google Tab – the Shopping or Images Tabs. Visual searchers are a valuable and growing subset, and **brands should optimise their image assets to grow brand presence** and sidestep competitors on the search interface.

#8 Getting Ahead

Winning the click at the exact point of 'purchase readiness' is fiercely competed and expensive. Many searchers conduct research as part of the purchase journey, and brands can get ahead of the game by **creating informational content to capture clicks early in the funnel.**

#9 Copy Magic

Crafting **distinctive and memorable words and phrases** can be a powerful weapon to grab extra milliseconds and **stand out on the crowded search results page.** It proved especially effective for more 'considered' searches in our study, with brands capturing attention using an original copy stance.

#10 Downstreaming

Sectors like insurance, hotels and restaurants are dominated by comparison and review sites like TripAdvisor and MoneySupermarket taking the lion's share of clicks. **The key to success is not in competing head-on** with these well-liked, trusted sites. **Brands should look to 'go downstream', exploiting Google's rich search feature set to earn clickshare** in hotly contested SERPs.



Whenever you see this icon, you can head to the **Red C Marketing YouTube channel** to watch the supporting eye tracking screen recordings

10 Stand-out Strategies

for Search Success



#1 Brand Trust

Build brand familiarity to win more clicks on Google

Most Google searches in our study – across a wide range of sectors – resulted in a familiar, trusted, credible brand being chosen for the first click. And when so many searchers **already have a brand in mind** when performing this type of search, it's clear that raising awareness and trust in your brand is an essential part of getting clicks on the SERP.

You need an integrated approach to be in the frame. So while effective PPC and SEO strategies are key in ensuring your brand is high in the results when a consumer is searching, **being in the consideration set in the first place requires marketing away from the SERP.**

Getting first clicks isn't therefore just about your bought and earned rankings... it's down to your whole omnichannel marketing strategy.

Do you have hundreds of stores up and down the country? An easy-to-use app already on thousands of users' phones? A big database of customers regularly mailed? That's great, and that'll win you clicks on the SERP.

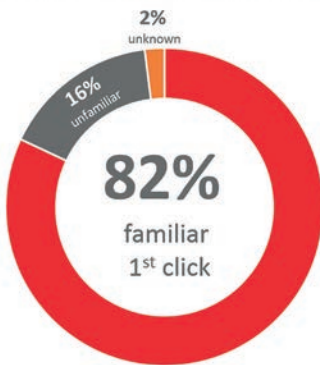
If you don't have these advantages, then you need to work out how to boost the profile of your brand with your target audience to put you into the consideration set when a search is started.

"I always tend to go to the links I know. Next is a brand I know and they do nice and reasonable clothes."
Female Pre-family respondent

Most searches result in a familiar brand being chosen

When asking respondents about the brand they chose when tackling a search task, a huge majority of searches (82%) resulted in them opting for a brand they were familiar with as first choice, across a wide range of sectors.

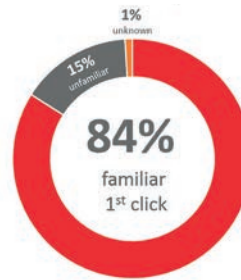
The influence of brand familiarity did diminish with age, with respondents at the post-family lifecycle less likely to choose a familiar brand – 67% versus the 82% of all respondents.



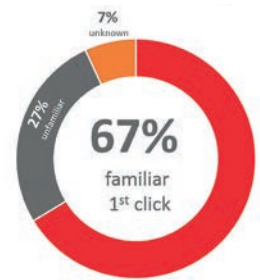
1st clicks brand familiarity
Sample size: 150 searches



Pre-family
Sample size: 32 searches



Family
Sample size: 88 searches



Post-family
Sample size: 30 searches

The motivations for the first click

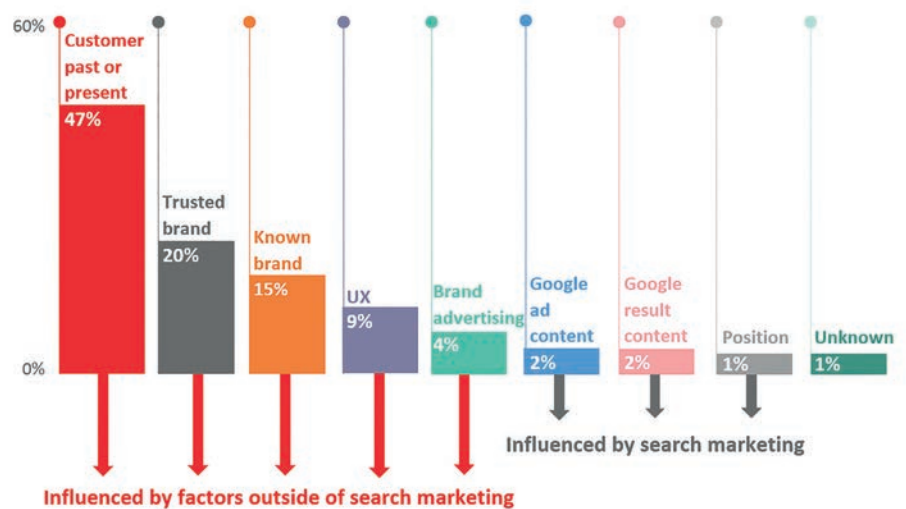
When we investigated further, being a 'past or present customer' was the most common reason for a search resulting in a familiar brand click – 47% of respondents. Opinions of the brand also drove a high percentage of the clicks with 20% for 'trusted brand' and 15% for 'known brand'. User experience was the motive for 9% of the clicks and brand advertising (TV and radio) 4%. User experience was the motive for 9% of the clicks and brand advertising (TV and radio) 4%.

That means the overwhelming majority of first choices, especially for younger searchers, are driven by 'off-page' factors – familiarity with the brand through experience or advertising.

In our study, the remaining 5% of 'familiar brand clicks' were directly influenced by PPC and SEO, with 2% for 'ad content', 2% for 'result content' and 1% for 'position on the page'.

"I know Dunelm, but what made me click on the image was the colour of the product shown which matched my bedroom."

Female Family respondent



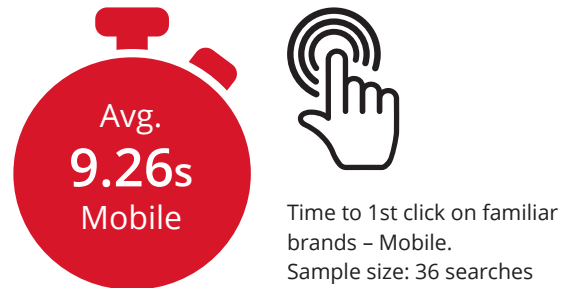
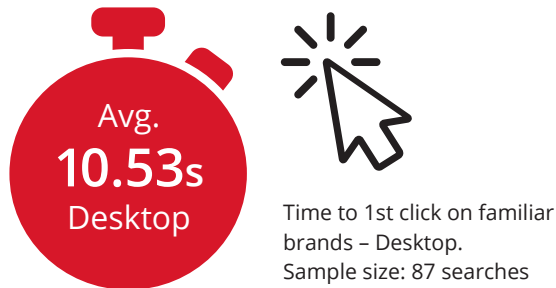
Reasons for 1st clicks on familiar brands

Sample size: 123 searches

Discover strategies to capture 'unfamiliar brand clicks' on pages 11 to 13

First clicks on familiar brands are made quickly

What's more, the research revealed that first clicks on familiar brands were being made fast. It took just 10.5 seconds on average on desktop and 9.3 seconds on mobile. In these searches the searcher already has a brand in mind and it's important that they find your brand quickly.



Clicks on familiar brands are 'safe searches'

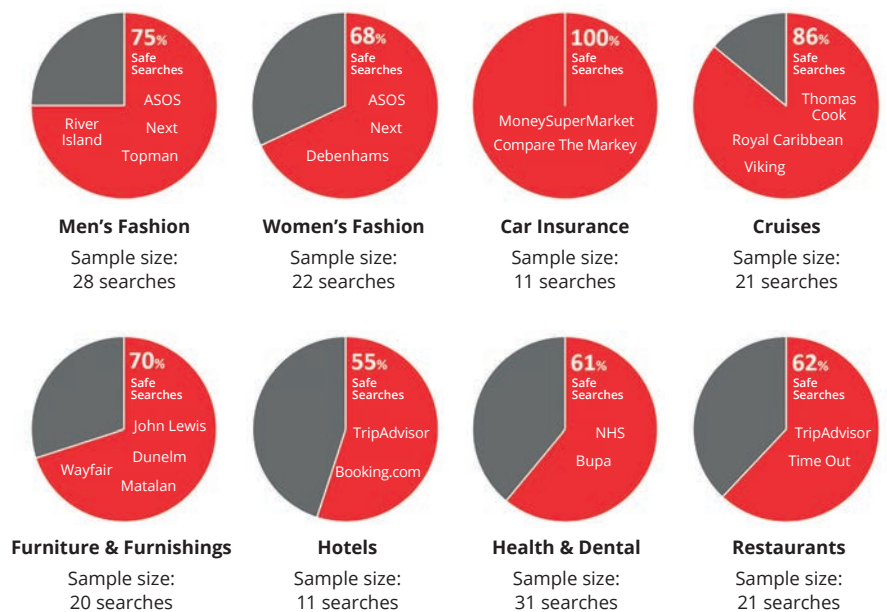
When a familiar brand was chosen it could be described as a 'safe search' – the searcher is coming to the SERP with a brand in mind, then scanning the results to locate their preferred choice.

Brands which are trusted, or purchased from previously, will win in searches like this. Whilst some respondents tended to stick to a single brand, others considered a range of familiar websites to make comparisons.

Which brands dominated in the 'safe searches'?

The brands that were chosen most often for the first click in these 'safe searches' can be seen in the pie charts. They are amongst the UK's most familiar and trusted brands in each of the sectors, even where the choice is an aggregator or comparison site, such as in Hotel and Restaurant searches, where TripAdvisor and Booking.com dominate.

Unsurprisingly, the NHS (National Health Service) dominates Health & Dental searches, as one of our most trusted institutions.



Percentage of safe searches and brands that were chosen most often (by sector)

Of course, this is qualitative research, and we're down to small numbers in some sectors. But with a finding that is **so consistent** across all the sectors and search terms we researched, it is clearly an important factor.

Is there hope for challenger brands, when big brands are so dominant?

Well, we still found a sizeable minority of searches that we came to think of as 'open-minded' – open to persuasion. More on that in the next section. And it's worth remembering that the dominant fashion brand, ASOS, is itself only a teenager, founded in 2000 as AsSeenOnScreen, a start-up date it shares with TripAdvisor!

#2 Click Persuasion

Capture attention in open-minded searches

On a level playing field, familiar, trusted brands will always win the click...but when consumers are searching for a new product or service, all bets are off! If they have never shopped for that product before, or if they have never eaten or stayed in that area before, or they just need inspiration, then they adopt a more considered, more open-minded approach to their searching.

The content of your PPC ads, the copy on your Organic results, the images in your Shopping ads, the shots you optimised for visual searchers...all these can draw attention...and clicks... in open-minded searches.

We found a significant minority of search tasks in our study resulted in searchers choosing a brand they had no previous knowledge of. **This is where search marketing techniques can really make a difference.**

Investing in PPC and SEO is key in winning attention and first clicks when this type of search is being made, as your position on the SERP and the content of your ad or organic result will be what attracts that searcher, as opposed to the searches that result in 'familiar' clicks (discussed on pages 8 to 10) where there is some awareness of the brand chosen.

*To find out how position on the SERP impacted attention and clicks see **pages 14 to 18***

A minority of searches result in an unfamiliar brand choice

In the study, only 16% of the searches undertaken resulted in a first click on an unfamiliar brand. This was consistent for both men and women, and for the pre-family and family respondents (14% each).

The exception was older, post-family respondents, where nearly a fifth of searches from this lifestage resulted in the choice of an unfamiliar brand. The reasons for this varied, but a couple of the post-family respondents said:

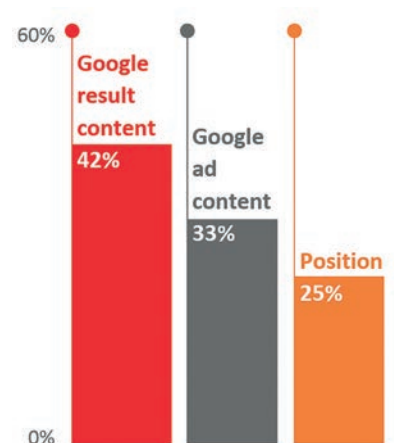
"If I go out in Manchester, I always go for something quirky - the word "quirky" was mentioned in the result."
Female Post-family respondent

"Just go for the second one down, as the top one is expensive."
Female Post-family respondent

Reasons for clicks on unfamiliar sources

When asking respondents why they chose an unfamiliar brand, 42% said it was because of the content in the Organic result, and 33% said it was because of the content in a PPC or Google Shopping ad. Both demonstrate how important and persuasive the content in Organic and Paid results can be.

We consistently found that, when subjects were searching for something new – such as river cruises, dentists near me, holiday cottages – where they didn't already have a preferred brand, they would **study the results for longer, and they were more 'open to persuasion' in their choices.**



Reasons for 1st clicks on unfamiliar brands
 Sample size: 24 searches

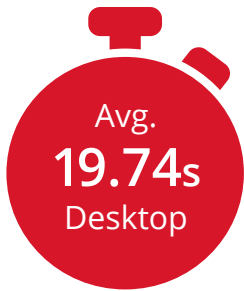


Dentist in Manchester | Teeth whitening - Dental at MediaCityUK
<https://www.dentalatmediacityuk.co.uk/teeth-whitening/>
 Tooth Whitening in MediaCityUK. Having your teeth whitened will give your smile a renewed sparkle and improve your self-confidence. Why not enquire today to find out if you would be suitable for a brighter whiter smile? Here at Dental we offer three pain free whitening options. Contact us.

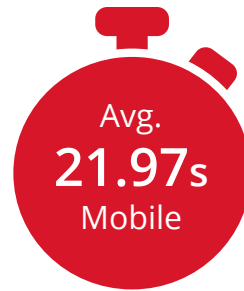
Despite it being presented on a SERP packed with options, the fourth organic result for a 'teeth whitening' search caught attention and earned a click, because of the area details mentioned in the copy.

Click decisions take longer when an unfamiliar brand is chosen

What's more, when analysing the time to first click for searches resulting in an unfamiliar brand being chosen, the time taken is double when comparing to clicks on familiar brands - an average of 20 seconds on desktop and 22 seconds on mobile.



Time to 1st click on unfamiliar brands – Desktop.
Sample size: 19 searches



Time to 1st click on familiar brands – Mobile.
Sample size: 5 searches

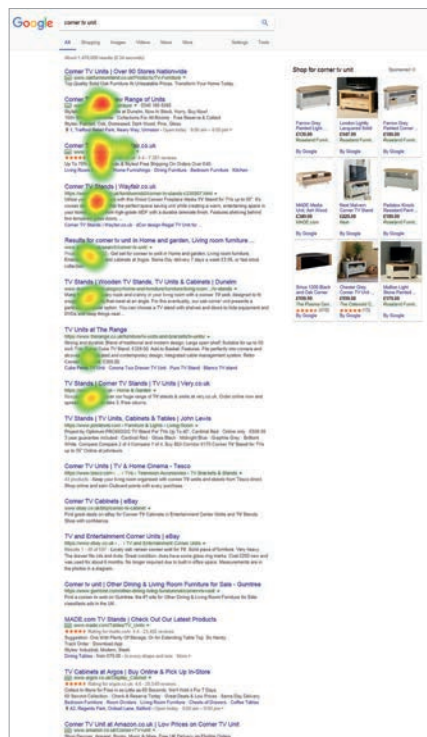
'Open-minded' search behaviour was identified

Searches take more time and more attention is paid to the results when the searcher doesn't have a brand in mind to answer that search query. This is perfectly illustrated on these two heatmaps for the same search 'corner tv unit'.

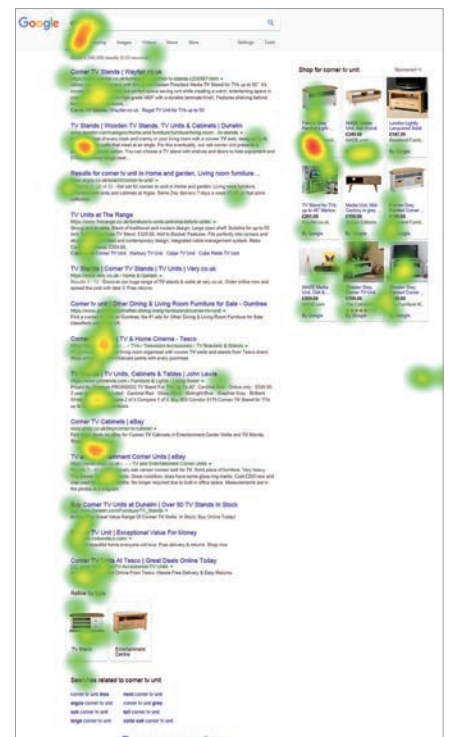
Throughout our research, when searchers were confronted with a search term for which they **lacked a trusted or preferred brand**, they demonstrated a much more open-minded approach to the task.

"I clicked on the image because I liked the look of the cabinet and I could see the price on it as well."
Male Family respondent

"The Images Tab gives you a wider choice of brands, which you might not even search for. And Shopping does the same..."
Male Pre-family respondent



Searcher quickly finding and clicking on a familiar brand (Tesco Direct) in 5.42 seconds.



Searcher with no clear 'preferred brand' in mind, clicking on a Shopping ad (Roseland Furniture) in 21.78 seconds.

They took longer to make a 'first click choice', and the **content of Organic results and PPC ad copy became much more influential**. Visual search results such as Shopping images were referenced more, and respondents were more likely to choose the Shopping or Images Tabs or refer to the Google Map or Local Listings pack.

#3 Searchability

Win clicks from beyond the top-of-page

Most search marketers are forensically focused on ensuring that their Paid search ads are in the 'four pack' at the top of the Google SERP, and that their most important landing pages feature in the Top Three Organic search results for important search terms in their category.

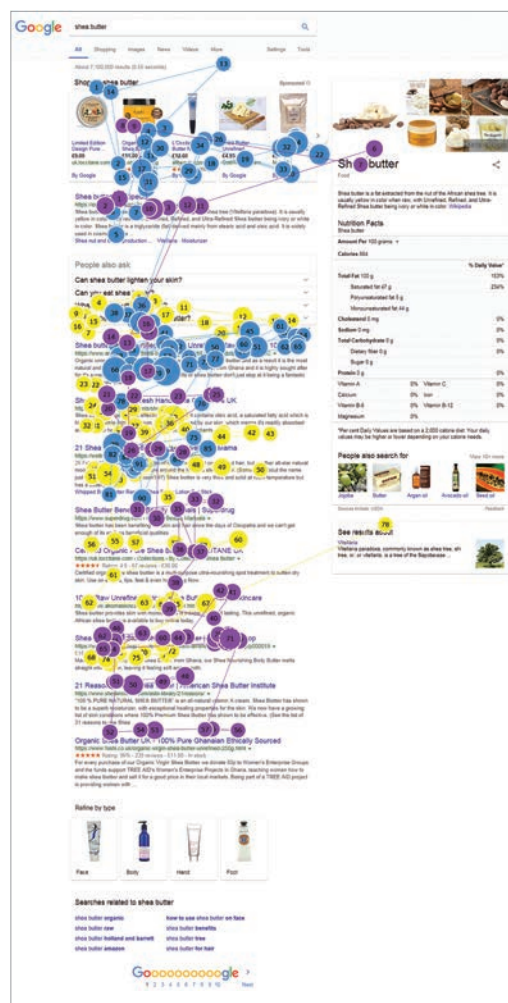
But what if your intensely competitive sector is making this difficult to achieve?

Well, the good news from our study is that **Google is providing a growing number of alternative ways to grab searchers' attention.** And the even better news is that consumers are increasingly responsive to a range of SERP features, including Maps, Featured Snippets and alternative Google Tabs.

We saw plenty of evidence of searchers scrolling more deeply in their quest for information and product choices. And we saw that the current Google search interface has evolved to help them make good, fast choices whatever their search need, with elements combining to influence the click.

What's more, **on mobile devices**, where scrolling is faster and more dynamic, the evidence suggests that **clicks are made deeper on the page**, as searchers are less 'spatially aware'. As a result, the potential opportunities to win the click beyond the Top Three Organic results are greater.

And finally, it's clear that **emotional engagement plays an influential role in time spent on the search results.** Where searchers were more 'invested' in the search task – looking for party dresses, teeth whitening or luxury hotels – or where the product was more expensive, such as a family holiday, they will go further down the search results and give each more consideration.



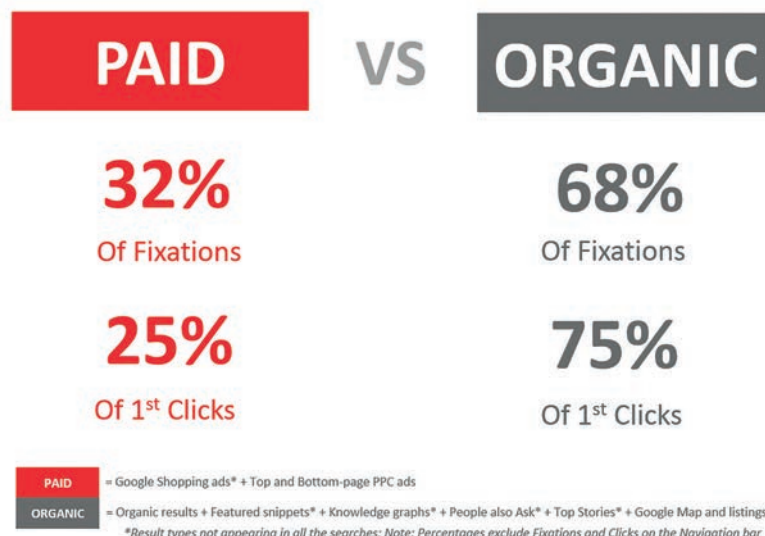
Aggregated view of the attention spread all over the SERP within the first click journey for a beauty search.

'Paid' or 'Organic'?

Our research study revealed that 'Organic' wins the fight for attention and first clicks within the SERP journeys.

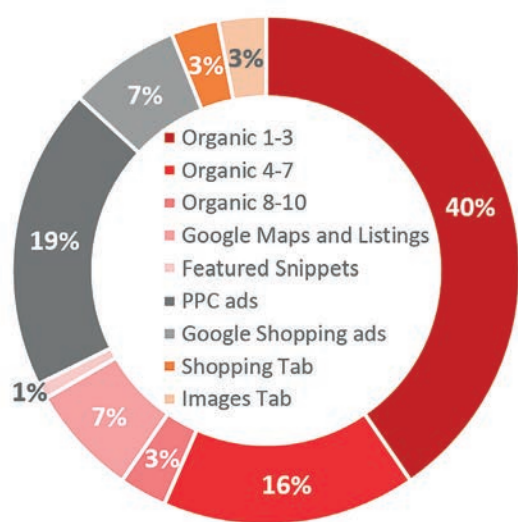
At first glance, the metrics seem to confirm the 'rule of thumb' search marketing principle, with 'Organic' results accounting for above two thirds of attention fixations and 75% of first clicks on desktop. To a certain extent, these proportions are linked to the extended coverage given to Organic results on the SERP compared to the space occupied by 'Paid'.

And while Paid results may sometimes include Shopping in addition to the PPC ads on the right-hand side, this does not appear to affect the proportion of attention and clicks which 'Organic' accounts for. Of course, **'Organic' does not mean just the 'ten blue links'** anymore; it includes Featured Snippets, Knowledge Graphs, Google Maps, Image Packs and a variety of other features, depending on the type of search.



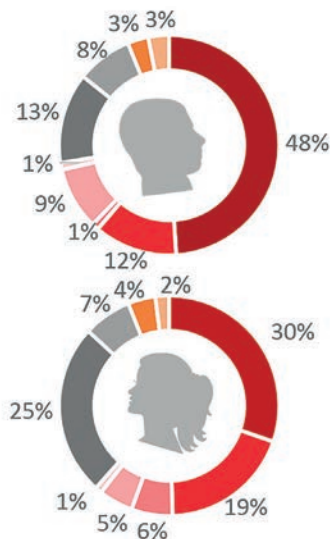
Sample size: 118 searches (desktop only; fixations not available for mobile)

Organic rankings 1-3 earn the biggest share of first clicks



1st clicks count (by result type)

Sample size: 174 searches (desktop and mobile; 91 male + 83 female)



On both desktop and mobile, most clicks went to the ten Organic rankings (59%), of which 40% were on the top three results. From a gender perspective, this first click choice was more noticeable among male respondents (48%). Female participants were nearly as inclined to first click on a PPC result (25%) as on one of the 'Top Three Organic' results (30%), usually driven by the familiar brands showing in the ads.

Overall, PPC results were first clicked in 19% of all searches, followed by Google Shopping (7%), Google Maps and Local Listings (7%), and the Google Images and Shopping Tabs (6%). However, it is worth noting that - apart from Organic - **not all the result types appeared in all the searches**. The proportion of first clicks differed depending on the frequency of appearance on the SERP and, implicitly, the nature of the search.

Discover more about Google Shopping on pages 19 to 22

| Search result type | % of searches showing a certain result type | % of first clicks based on the results shown |
|--------------------------|---|--|
| Organic 1-10 | 100% | 59% |
| Google Maps and Listings | 18% | 41% |
| Featured Snippets | 7% | 15% |
| PPC ads | 81% | 23% |
| Google Shopping ads | 49% | 15% |
| Shopping Tab | 99% | 3% |
| Images Tab | 97% | 3% |

For example, when looking at percentage of first clicks based on how many times that search result appeared, Google Maps and Local Listings earned 41% of the first clicks, as they were only present in the geo-searches conducted (18% of all searches). Google Shopping ads' performance is also noteworthy, capturing 15% of first clicks in the ecommerce searches.

Find out more about the influence of Google Maps and Local Listings on pages 23 to 25

Page ranking impacting first clicks

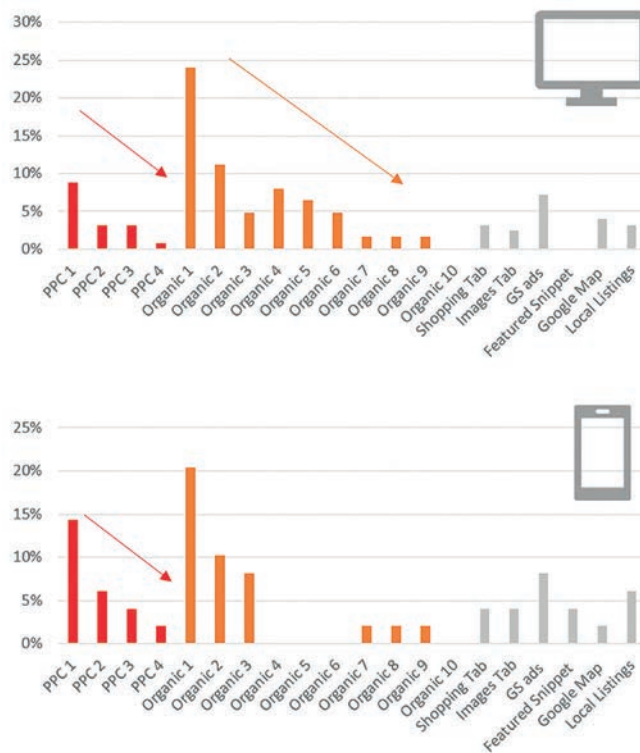
What's more, both PPC and Organic results earned more clicks towards their top rankings, on both desktop and mobile.

PPC performance is arguable, as the likelihood of attracting more clicks on the first ad might be correlated, to a certain extent, with the full set of four ads not being displayed in every desktop and mobile search. On Organic though, ten results showed up in almost all the searches (occasionally one result was replaced by 'Top stories' or 'Images' carousels), and there was still a noticeable pattern of desktop first clicks decreasing with rankings. Whilst this trend was influenced by some respondents' deliberate choice to click on a well ranked result, we believe that the static viewing experience which searchers face on desktops had an impact, preventing lower positions from getting as much visual attention and clicks as the higher positions.

Mobile searching proved to be more dynamic, involving more and quicker scrolling further down the SERP. We believe our respondents were less spatially aware, so they judged the results' rankings less, and subsequently, sometimes clicked towards the bottom of the SERP.

"I clicked on it because it was the first one there... it's because of the speed...ease... I just went there to have a look first..."

Female Family respondent



1st clicks count (by ranking by device)
Sample size: 174 searches (125 desktop + 49 mobile)

View an animated gaze plot showing a search journey towards clicking on the first Organic result

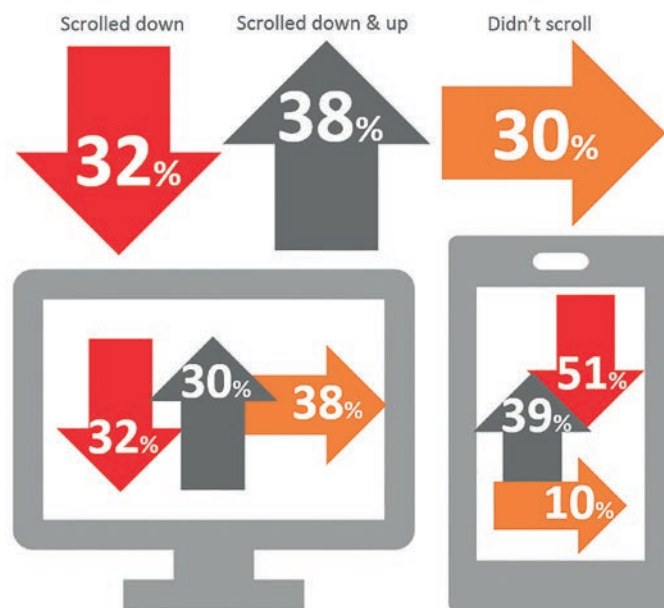
Watch a mobile recording showing a click towards the lower section of the SERP

Scrolling behaviour influences first clicks

A prominent scrolling behaviour was observed throughout the study on both desktop and mobile devices and, to a certain extent, it influenced first click choices.

Overall, 70% of the desktop and mobile searches involved some kind of scrolling (down or down & up), usually towards the middle or even the bottom of the page. **In over half of the 'scrolling' situations, respondents scrolled back up** - usually towards a search result that they had already spotted.

"I always have an idea of which shops I'd like to shop in anyway, but I kind of like to quickly scan more of the results [before going to the known brand]."
Female Pre-family respondent



Scrolling behaviour on the Google SERP

Sample size: 174 searches (125 desktop + 49 mobile)



Watch a respondent scrolling towards the bottom of the SERP and then scrolling back up

Whilst some participants' scrolling behaviour was based on their desire to explore more options, in many situations, the scrolling or no scrolling intentions were purely related to finding a familiar brand.

"I couldn't find River Island in the results, so I looked back on the Google Shopping images and it was there..."
Male Pre-family respondent



Aggregated heatmaps illustrating a 'deeper' search for 'European river cruises' vs a 'shallower' search for 'wisdom teeth removal'.

Shallow versus deep searches

The scrolling behaviour presented above occurred differently depending on the search term, and sometimes, on sector. Therefore, based on the degree of attention they received, some searches proved to be 'deeper' than others.

The first aggregated heatmap shows how respondents absorbed more information in their search for 'European river cruises'. Skimming through the PPC ads, a Featured Snippet and a significant part of the Organic listings shows that the search for a cruise holiday tends to involve more time spent on the Google SERP.

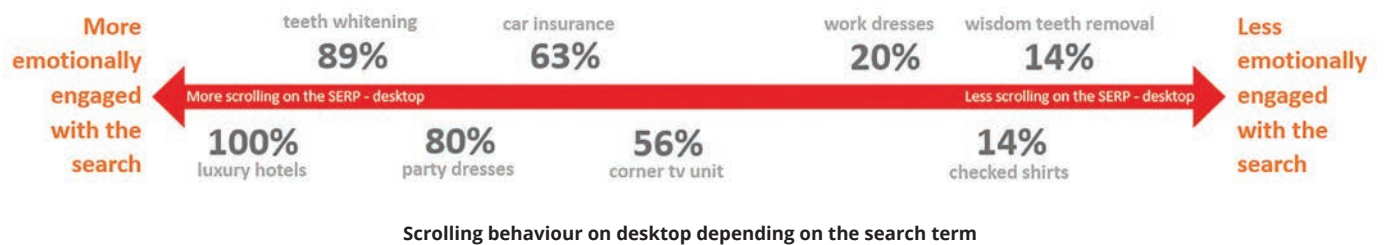
The second example illustrates a shallower search, with respondents' attention concentrating towards the top results of their dental informational search. The presence of the trusted brand - NHS - just at the top of the page was, for some respondents, a reason not to explore further the other results.


Emotional engagement influenced depth of search


Whilst scrolling on the SERP can be naturally related to each person conducting a Google search, it is also influenced by the products they are searching for.

The axis below plots some of the items we asked respondents to look for, depending on their scrolling percentages. We found that those searches where less scrolling occurred probably involved less emotional engagement in the purchase.

For example, most of the male respondents who looked for a relatively basic fashion item – like a checked shirt – tended to go straight to a brand appearing just in the opening screen. Just as those who solved an informational search task within the dental sector behaved. Conversely, women’s party dresses searches resulted in much deeper scrolling, suggesting a more emotionally engaged search behaviour. Similarly, travel search results retained consumer attention for longer, making a more considered search for a more expensive item - a holiday.



 See a search journey for finding a hotel, involving the scrolling behaviour

 Watch a respondent's first click journey without scrolling down

#4 Shopability

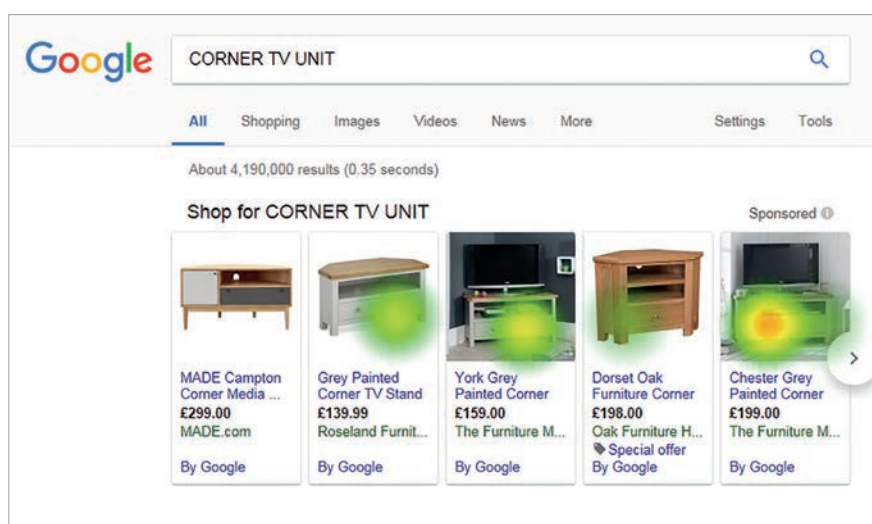
Harness the influential impact of Google Shopping

Google Shopping has become one of the most powerful and cost-effective marketing tools for any ecommerce brand. A veritable online bazaar offering millions of competing goods from thousands of retailers, all directly accessible with a single mouse click.

Our research study suggests that **Google Shopping punches above its weight in ecommerce searches, influencing other Paid and Organic clicks** on the page, and leading to clicks on unfamiliar brands.

What's more, many of our respondents told us that, for some types of search, Shopping catches their attention and helps them to decide on the type or style of product to look for. Shopping results appear much more prominently on mobile devices and are highly effective in tempting searchers to interact by 'swiping' through the carousel of products.

It is clear from our study that Google Shopping plays a vital role early in the Sales Funnel, driving 'click-assisted' and 'impression-assisted' conversions, even when it doesn't capture the click. For ecommerce brands Google Shopping is an essential component of the digital channel mix.

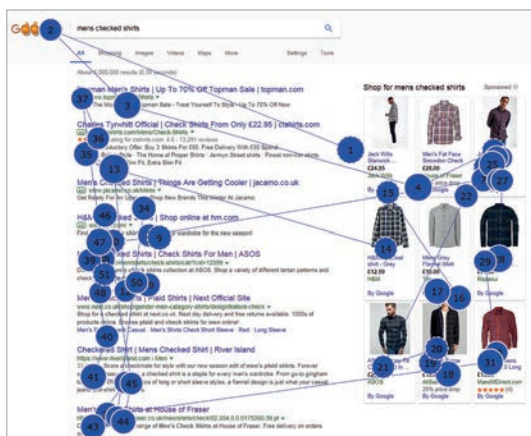


A Female Family respondent's level of attention to the Google Shopping ads.

An influential part of the journey

Overall, when desktop and mobile search results display Google Shopping results, a significant percentage of respondents [80%] paid some attention to these ads.

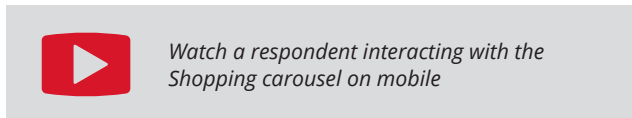
On desktops, Shopping results most often appear as a 'nine-pack' to the right of the PPC results. Thus, the fact that they are always in peripheral vision drives searchers to perform a zig-zag behaviour while absorbing the multitude of results appearing on the page.



Male Family respondent bouncing between the main search results and the Shopping nine-pack.



Attention to Google Shopping ads
Sample size: 86 searches (66 desktop + 20 mobile)



On mobile devices, Shopping displays even more prominently as a carousel, and 100% of our respondents viewed them, with almost 35% interacting with the carousel, by swiping through images as part of the consideration process.

"I like to use the carousel because it is like a preview of what's available on the websites..."
Female Family respondent

Resorting to Google Shopping depends on the amount of inspiration needed

The level of interest and attention paid to Google Shopping differed from search to search. Both male and female respondents found it most helpful when they were less confident about what style or type of product they wanted. The searches for 'teeth whitening', 'shea butter' or 'corner tv units' are great examples in this instance.

"I tend to pay more attention to the Google Shopping images not necessarily for fashion, but for more random stuff for which I don't necessarily know where to go."
Male Family respondent



Percentage of respondents showing attention to the Google Shopping ads in certain searches.

Although many respondents at least glanced at a Google Shopping ad in the searches conducted, regardless of sector, the actual interest and time spent on this area of the SERP varied considerably – this is reflected in the number of fixations recorded.

When searching for black jeans, for example, 100% of our male respondents studied Google Shopping, with fixations ranging from 1 to 62. This high degree of interest shown for the men’s jeans Shopping images could be due to men’s tendency to choose quicker shopping paths that help them make their buying decision immediately.

In contrast, the 63% of the women who searched for duvet covers spent much less time on the Google Shopping ads, with fixations fluctuating between 1 and 5. Our female respondents told us that, for home textiles at least, the quality is much more important to them, so they would tend to choose familiar, trusted brands and retailers rather than rely on the images alone.



“I have some go-to brands, so if I see them popping-up on the first page, I go straight to them and don’t really look anywhere else...”

Female Family respondent

Clicking on a Shopping ad

As we revealed in a previous section, some people conduct ‘safe’ searches, so they are more likely to click on Google Shopping results only if familiar brands appeared here.

“I couldn’t find River Island in the results, so I looked on the Shopping images and it was there...”

Male Pre-family respondent

But for half of the respondents who first clicked on a Google Shopping ad, their choice depended on the ad’s content. Often the Shopping images helped them to get started on their search journeys. Some respondents skimmed through the search results and – having found no suitable link to click on Page One – resorted to a Google Shopping result that they had already spotted.

“I clicked on the image because I liked the look of the cabinet and I could see the price on it as well...”

Male Family respondent

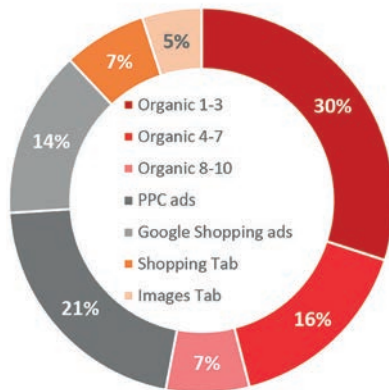
We concluded that the ‘visual immediacy’ of Google Shopping results made them a powerful engine to attract clicks for the less familiar or unknown brands.



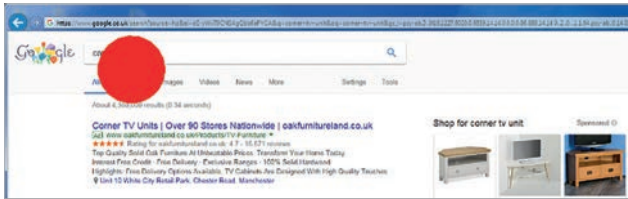
Spread of attention over the SERP, including the Google Shopping ads, by a Male Family respondent.

The Shopping Tab is a key differentiator for Google

Perhaps the biggest surprise in the ecommerce part of our research was the finding that a full 7% of our respondents chose the Shopping Tab at the top of the page as their first click. That means that total click-share for ecommerce PPC jumped to 42% when the Shopping Tab clicks are included!



1st clicks count (by result type)
Sample size: 91 ecommerce searches



Screen shot showing the attention concentrated on the Shopping Tab just before clicking on it, by a Male Pre-family respondent.



Watch a respondent's desktop search journey using the Shopping Tab

And for those savvy consumers who chose this route, it was a real benefit of using Google compared with their experience of other search engines:

"I noticed Google has this Shopping option which other search engines don't...I always use it as a filtering thing to get the best prices. It's good for specific items 'cos you can see all the different places you can buy from and where there's an offer on..."

Female Pre-family respondent



Sequence of attention on the Shopping results, by a Male Pre-family respondent.

Although Google Shopping has been around in one form or another for years, it was clear that some of our respondents were just getting used to it – even among the younger participants. For these shoppers, Google Shopping was being used as a 'discovery tool', to spot products they might like from unfamiliar brands. What's more, some consumers found it especially helpful when they were less confident about what style or type of product they wanted.

"I've only recently discovered the Shopping Tab...it gives you a bit more choice that you might not search for, so it widens the brands you're looking at...and it takes you straight to the page of the product you want instead of the whole website where you'd have to find it yourself."

Male Pre-family respondent



View a respondent's mobile search journey using the Shopping Tab

#5 Mapability

Exploit map-based search for geo-searchers

Google Maps is a powerful, continuously improving feature that we have all come to depend on, but when consumers are searching for a location – for a meal, for somewhere to stay, for local services like dentists or physiotherapists – then it really comes into its own.

Around one in five of the search tasks in our study resulted in a Map showing prominently in the SERP. Location-based searches like ‘restaurants near me’, ‘places to eat Manchester’, and ‘luxury hotels London’ all generated Google Maps, and our respondents clearly found them useful, and often chose to click on the Map itself, or the ‘Local Listings’ immediately below.

What’s more, we saw **search behaviours that differed from the common ‘familiar brand’ search strategy**, as searchers dragged and zoomed the map, and focused on the reviews, the star ratings and the ‘business snapshot’ provided by the Google My Business section.

Google Maps gave these consumers an advanced, visual search strategy.

A way to pinpoint the ideal location, and gain valuable additional data to make informed, easily compared choices.

It levels the playing field for local businesses up against national competitors. And if you operate in a sector dominated by aggregators and comparison sites – such as hotels or restaurants, for example – then optimising your Google My Business entry to raise your Maps visibility, and encouraging reviews at every customer touchpoint, could be a breakthrough strategy.

“Easier to lay everything out to see if something is central or not.” [When asked why the Google Map was used]

Female Pre-family respondent

“Firstly I wanted to see how visually close they were...once I found a few nearby I wanted to check the reviews.” [When asked why the Google Map was used]

Male Family respondent

The influence of Google Maps on the SERP

When location-based searches are conducted, the Map and Local Pack dominate the top area of the SERP, and not surprisingly we saw respondents paying attention to this section. Google Maps are a long-standing SERP feature for geo-searches, and our respondents clearly found them very useful.

In our study, Google Maps won the first click in over 40% of these location-based searches, with either the Google Map itself or one of the Local Listings being chosen rather than a 'brand'. The reasons given for this choice included being able to see the location, seeing all options and/or prices together, seeing reviews and being able to see images.

"I'd generally use the map so you can see all the prices in one go, rather than clicking to the sites."

Male Family respondent

It was clear from our research that for geographic searches, consumers were much more likely to abandon their 'familiar brand' search strategy (discussed earlier) and adopt a location-based approach. In tackling a geo-search task, they already understood that by switching to the Google Maps interface, **they were able to quickly and efficiently access a much richer data set**, visually.

This included exact street-level locations, reviews and ratings, and summarised 'snapshots' – from Google My Business - of the hotel, restaurant, dentist or physiotherapist. In the case of the hotel searches, they also benefited from seeing pricing information on the Map itself. A much more informed search strategy. What's more, they found it easy to reposition the map by dragging and zooming in and out with ease.



Gaze plot showing attention on the Map and especially on the details of the Local Pack, for the search term 'physiotherapy near me' from a Male Family respondent.

Google Maps provides an advanced visual search

Continuing their search journey on Google Maps gave these searchers an advanced, visual way to search for a location, and valuable additional information **to make an informed, and easily comparable choice** from the pool of restaurants available, for example.

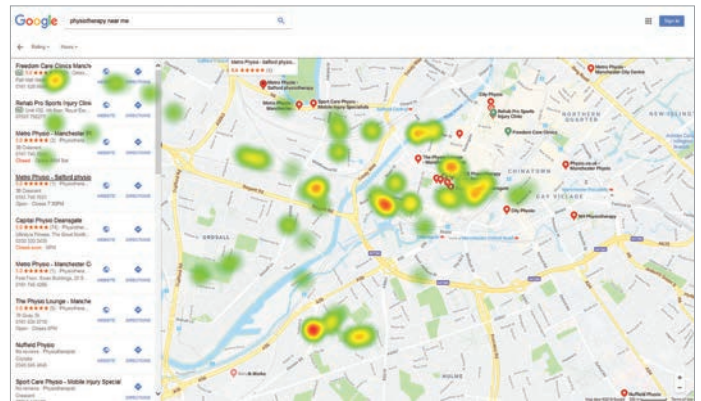
| Search result type | % of searches showing a certain result type | % of first clicks based on the results shown |
|--------------------------|---|--|
| Organic 1-10 | 100% | 59% |
| Google Maps and Listings | 18% | 41% |
| Featured Snippets | 7% | 15% |
| PPC ads | 81% | 23% |
| Google Shopping ads | 49% | 15% |
| Shopping Tab | 99% | 3% |
| Images Tab | 97% | 3% |

So it's no surprise that, on those occasions when Google Maps was present in our search tasks, it earned a big proportion of the clicks, as the table shows.

We saw respondents making their choices using the map, the listings and the information provided on the detailed listings (once a location was chosen). Some displayed a preference for searching using the map or the listing section, but there tended to be a combination of these tools being used.

Review star ratings influence clicks

In the restaurants and hotels sector we also saw some respondents using the extra information available on the map, such as review star ratings - and price, for hotels only - to help the navigate through the map and make a click decision.



Male Family respondent focusing on the map and listings area.



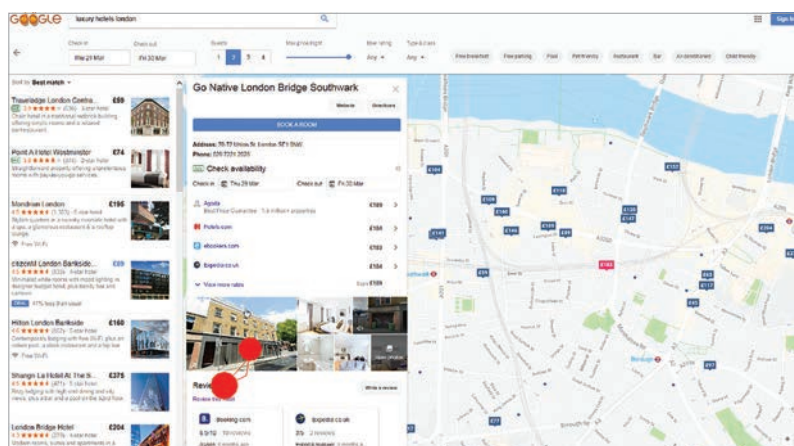
View one respondent's search journey using the review star rating in Google Maps

Information in the Google My Business listing got attention

Once a choice had been made in Google Maps, respondents paid attention to the detailed listing (the Google My Business snapshot), in some cases scrolling through the reviews below the images. You can see how this works on mobile when searching for 'physiotherapy near me', on the link below.



Watch a mobile search journey including attention to the Google My Business reviews



A Male Family respondent about to study reviews for one hotel.

There's no doubt that **Google Maps is well understood** and – when location-based searching is conducted – **a welcome and valued part of the search interface**.

Consumers appreciated the visual search functionality that allowed them to easily re-position their location, and view details, images and reviews, without needing to 'pogo-stick' back and forth between website pages.

"Because it said 5 stars, and it had more reviews, that's why I chose it."

Male Family respondent

#6 Position Zero

Master Featured Snippets for SERP result stand-out

According to a recent ComScore study, by 2020 voice search will account for 50% of all searches, driven by the widespread adoption of devices like the Amazon Echo and Google Home.

Google's search engine is already accommodating this trend with the introduction of Featured Snippets, and its sister feature, People Also Ask (essentially, more Featured Snippets in a drop-down format). Our research suggests that **consumers welcome Featured Snippets, especially for searches that are informational, or early in the purchase funnel.**

Many of the respondents in our study had only recently begun to appreciate how useful these could be, although Google has, in fact, been experimenting with the format for several years. Now search marketers are beginning to wake up to the potential of this powerful feature. After all, if you ask Google today, from the UK, what the weather is like on the Algarve in March, isn't it a big clue as to your holiday intentions?

In our study, several of the search tasks had an informational or pre-purchase purpose, and we saw strong attention and interest to the Featured Snippets and interaction with the People Also Ask drop-downs. There is a compelling case for search marketers to focus significant resource and effort on capturing these valuable, attractive 'Position Zero' elements on the SERP.

"I like the information boxes [Featured Snippets] because they provide an indication of what the answer is."

Male Family respondent

"I like the People Also Ask feature because it helps you get the information straightaway."

Male Family respondent

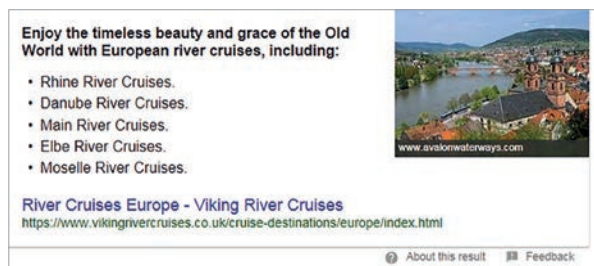
Position Zero assisting in the research phase of a buying process

When our study's search tasks were more informational in their nature, or related to an earlier stage in the buying journey - such as 'high protein foods', 'shea butter' or 'European river cruises' - we saw Featured Snippets (providing a shortened answer to a search query) and People Also Ask (a set of questions related to a search query) coming up consistently in the search results. **And our respondents found these features very useful.** They were attention hotspots, and subjects told us they liked the information provided.

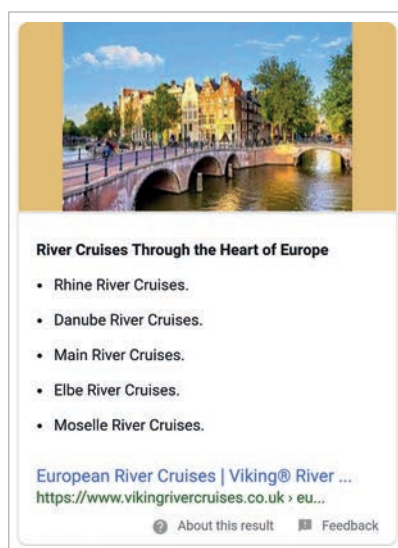
Featured Snippets getting attention

To illustrate this, in the searches for 'European river cruises' a Featured Snippet from Viking appeared in the results (in Position Zero after four PPC results) and we saw attention being paid to it from most of the respondents who tackled this search task.

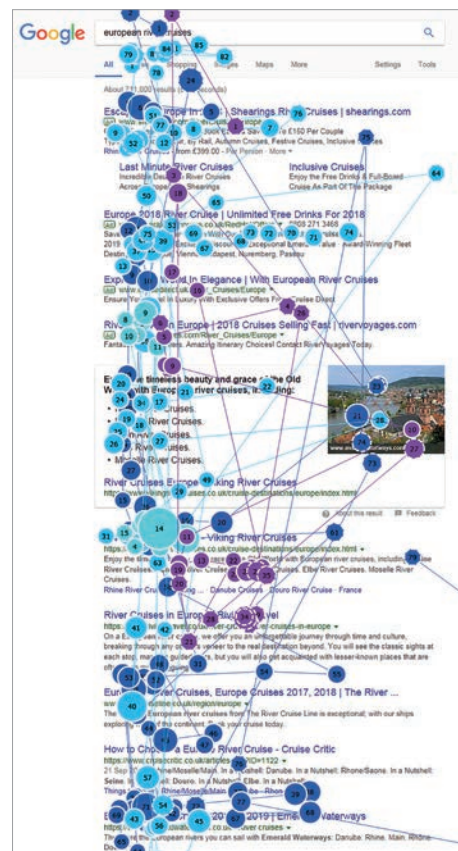
As you can see below, Viking's featured snippet, complete with an appealing image, benefits Viking not only with a bigger share of the SERP 'real estate', but also a boost to its brand awareness and credibility for this search; and that translated into attention from the respondents, as shown in the gaze plot.



Viking Featured Snippet appearing on Desktop.



Viking Featured Snippet appearing on Mobile.



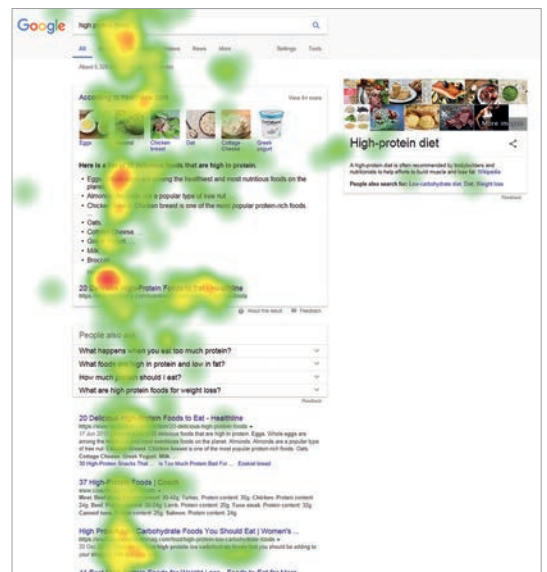
Aggregated gaze plot for 'European river cruises', based on four searches by Post-family respondents.

Although we didn't see any clicks on the Featured Snippet for this search term, interestingly we saw **60% of the first clicks going to the first Organic result** under the Featured Snippet - also for Viking! Compelling evidence for the powerful influence that the Featured Snippet exerted in this search task.


Featured Snippets getting clicks

By comparison, 'high protein foods' was a search term where the Featured Snippet did receive attention and clicks, and in all but one of the searches for this term, **the Featured Snippet had Position Zero** - right at the top of the page.

A full 45% of the first clicks for 'high protein foods' searches were earned by the Featured Snippet from Healthline. Perhaps this was partly driven by the research-led nature of this search task, but almost certainly in some measure by the dominant position on the SERP.




Aggregated heat map showing the attention received by the Featured Snippet in the 'high protein foods' searches.

 Watch one respondent's desktop search journey, clicking on the Featured Snippet

People Also Ask getting attention and clicks

We also saw the People Also Ask section getting attention and clicks for these more informational searches, with respondents clicking on the drop-downs, expanding the section **and pushing the Organic results further down the SERP**. The dynamic nature of People Also Ask - with more questions being added as a drop-down is clicked - all adds to this impact. A benefit, if you are one of the brands in the People Also Ask section, but not so much if you are a brand in the Organic positions below getting pushed further down the page!

 View one respondent's mobile search journey, using the People Also Ask feature

"I don't know how recently Google put that drop-down that contains very condensed information, which I find very helpful. It saves you trawling through loads of articles."
Female Pre-family respondent

| People also ask | |
|--|---|
| How long does it take to recover from a wisdom tooth extraction? | ▼ |
| How does a dry socket look like? | ▼ |
| Is it necessary to have wisdom teeth removed? | ▼ |
| Why do I need to remove my wisdom teeth? | ▼ |

Example of People Also Ask in the search results for 'wisdom teeth removal'.

A compelling case for focusing SEO effort on Featured Snippets

With many of our respondents expressing positive interest and high levels of satisfaction from interacting with the Featured Snippets and People Also Ask elements, it was clear from our study that this is a welcome – and smart – new* initiative from Google! And with voice search rapidly becoming more widely used by consumers, SEO specialists can't afford to ignore this powerful feature.

**Or not so new! Did you know that Google's predecessor to Featured Snippets – Quick Answers - first appeared in 2013?*

#7 Show and Tell

Work your imagery to inspire visual searchers

Not everyone wants to slog through the copy-based search results on Google. Many of the respondents in our research took a different approach. **Around 1 in 7 chose a Google Tab as the first stage in their ecommerce search process.** For some of the sectors we researched – fashion, furniture and furnishings, for example – the Shopping or Images Tabs proved a powerful tool to help some respondents refine their buying journey.

What's more, when you add in those searchers who spotted a Pinterest result, glanced at a Featured Snippet image, or paused at the Image bar in the search results, you begin to realise just how **influential** visual elements can be in your search marketing efforts.

So it's vital to treat imagery as a key asset in your brand's online marketing strategy.

A picture's worth a thousand words

Of course, you can **buy a presence** for your valuable product images on the SERP through Google Shopping, but our research suggests that you can **earn visibility** too.

Pinterest's visual search engine is becoming increasingly sophisticated and is often a starting point for certain types of search. But optimising your website's images to rank high on Google Images should be **a top priority**. Ensure that every single visual asset on your website is well-named, alt-tagged and compressed so your images will load faster.

Make your images work for you, and you'll capture a valuable subset of searchers. Not only making your brand more visible and accessible, but also potentially side-stepping your competitors too!

"It's easier to look at the Images, rather than going through all the writing."

Female Family respondent

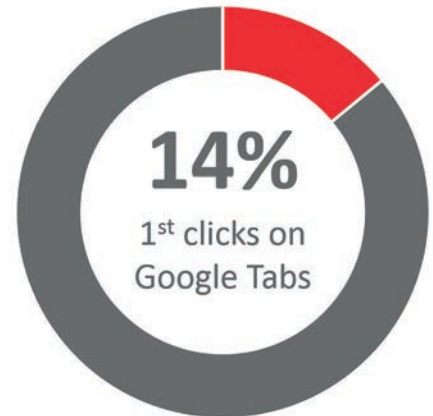
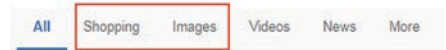
"As a quick overview, I quite often use the images, (...) to look for some ideas and then I click on if there's any ones that are good..."

Female Family respondent

A small, but important minority looked for inspiration on the Images or Shopping Tabs

Among the participants who searched for fashion, beauty, furniture or home furnishings, a significant minority (14%) first chose the Shopping or the Google Images Tab. This search behaviour indicated open-minded searching, driven by the user's desire to absorb a wider range of product options on a neutral 'territory', rather than choosing a familiar website straightaway.

These searchers had learned that the image-based grid format helped them to clarify and refine their product needs.



Sample size: 79 searches (ecommerce)



Watch one respondent's mobile search journey, choosing the Images Tab

The role of visual sources within the buying journey

Typically, navigating via the Shopping or the Images results provided useful inspiration, before the search journey was continued on the main SERP.

"I'd normally scroll through the images until I find a style I like, then I would Google that style and see what brands do something similar."

Female Family respondent

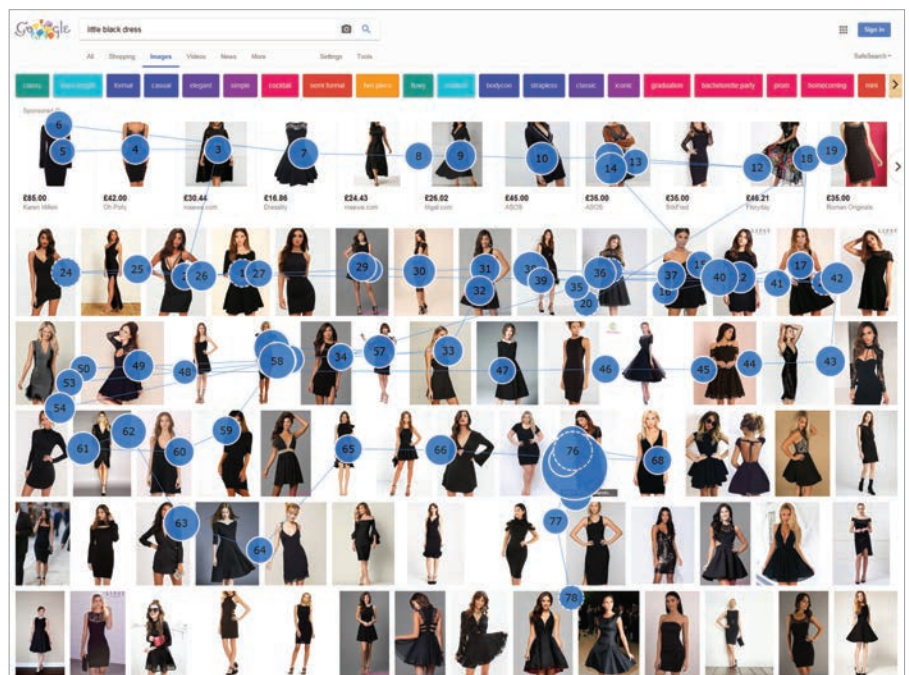
"I clicked on the Shopping Tab to see more images and to get a quick look through what would be available, to get ideas..."

Male Pre-family respondent

However, we also uncovered examples of respondents choosing new and unfamiliar websites, based on visual content that matched their expectations.

"I like to find new websites in this way [by going to Google Images], and then you can have things that other people might not have (...) I've never heard of that brand before, but I liked the image of the dress..."

Female Pre-family respondent



Female Pre-family respondent navigating on the Images Tab.

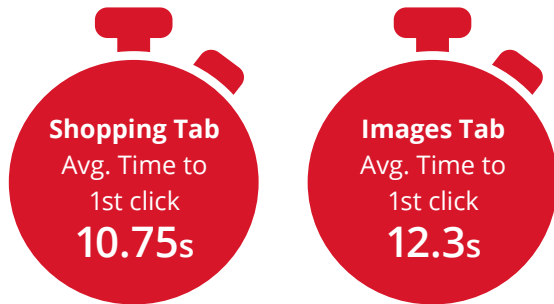


View a 'little black dress' search on the Images Tab, choosing an unfamiliar brand

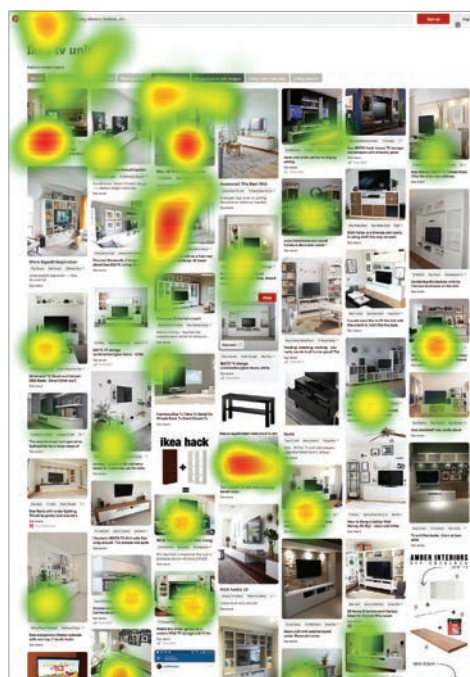
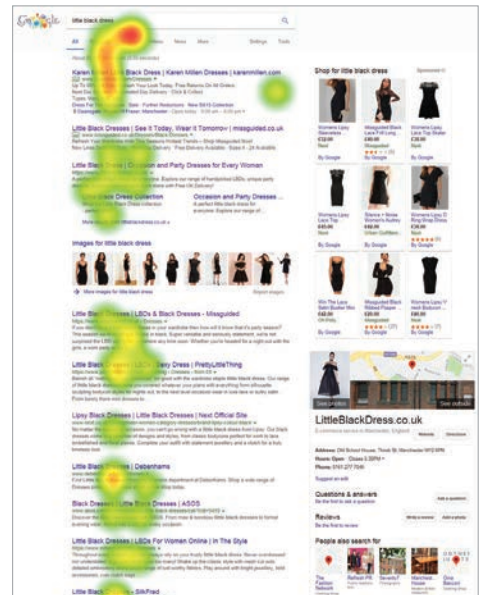
Learn more about open-minded search behaviours on pages 11 to 13

Skimming through the Google results before switching the tab

We found that many respondents did not go immediately to the Shopping or the Images Tab. Instead, they scanned through the multitude of results on the SERP, with some even scrolling all the way to the bottom of the SERP and back before seeking inspiration from the Google Tabs.



Female Family respondent skimming the SERP, but concentrating on the Images Tab at the top.



Pinterest – a preferred platform for browsing, not buying

Pinterest results occasionally appeared in the Google SERP for ecommerce search tasks. But although some respondents told us they find it useful when it comes to seeking visual inspiration, they also told us they wouldn't buy from Pinterest, despite its growing ecommerce capabilities.

"I use Pinterest a lot to get more ideas, but I never buy through them."

Male Family respondent

"I usually use Pinterest for interior design ideas and then search for a brand that stocks similar products or colours."

Female Pre-family respondent

Male Family respondent navigating on Pinterest.

Making your images work for you

Consumers have never before enjoyed such a powerful search toolkit helping them to find what they want, quickly, easily and intuitively. Personalised search results coupled with semantic search, voice search and lightning fast response times – on any device – mean it is increasingly challenging to capture a share of attention.

For some searchers, and for some search types, a visual search offers a way of cutting through – a shortcut to a more relevant and useful search result. Every search marketer could benefit from considering how to leverage this to advantage.

#8 Getting Ahead

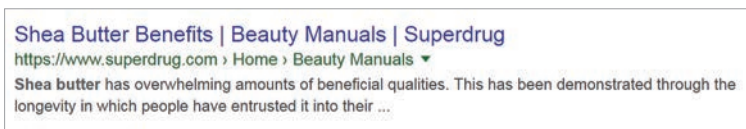
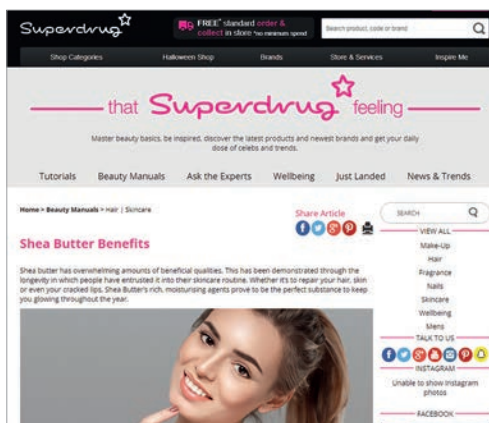
Pick clicks early in the purchase funnel

Winning the click – or even catching the prospective customer’s attention – **at the exact point of ‘purchase readiness’** is a real bunfight, as we’ve seen elsewhere in this document. And while we’ve already revealed some highly effective strategies for punching above your weight at this highly contested moment of truth on the Google SERP, our study also exposed another potential route for improving your click share, by **getting ahead of the game**.

A significant proportion of our respondents actively sought out useful advisory content as part of their online search journey. Indeed, many told us they **always conduct some form of research** before making certain purchases - holidays, clothes, beauty products, for example.

A research tactic we often observed involved searchers looking for informational content and recommendations. Online magazines and newspapers ranked high in some search tasks, and this visibility captured many clicks. But we did see examples where **respondents were attracted to search results offering guides and relevant articles directly from retail brands** – such as Superdrug and Olay in the beauty sector.

Capturing clicks early in the purchase funnel, when consumers are still seeking out pre-purchase advice and reassurance, is a valuable way to sidestep competition and win trust.



Google search result sending to a Superdrug 'Beauty Manual' about shea butter.

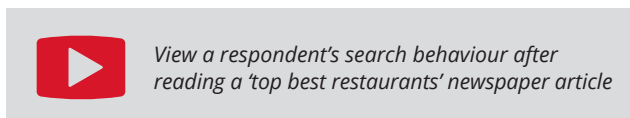
Screenshot illustrating the top of the 'Shea Butter Benefits' page on the Superdrug website.

*Find out more about respondents' interacting with Featured Snippets and People Also Ask drop-downs on **pages 26 to 28***

Getting pre-purchase reassurance by reading 'official' recommendations

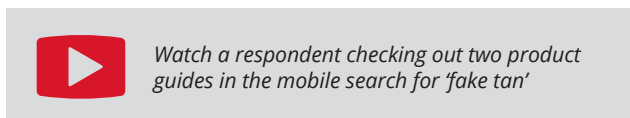
Although some search tasks required respondents to find out more - about dental, health or nutrition subjects, for example - there were numerous situations when informational sources were consciously chosen to help searchers in the purchase decision-making process.

Informational articles from Time Out, The Telegraph or Cosmopolitan - to name a few - were the first click destination in many searches for restaurants, hotels or beauty products. Having skimmed through the recommendations, most respondents subsequently searched for a brand, which had caught their attention in the article, on a familiar website. If the article was already on a brand's website, such as Superdrug's Shea Butter Guide, then respondents selected products and further explored their descriptions.

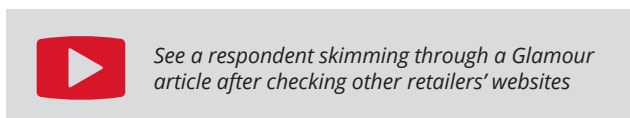


"If I'm researching make up or anything like that, then I tend to go to the magazine websites, where they kind of rank what's the best doing Top 10s, and then I look how many stars they have and the price, then I'd probably go to Boots..."

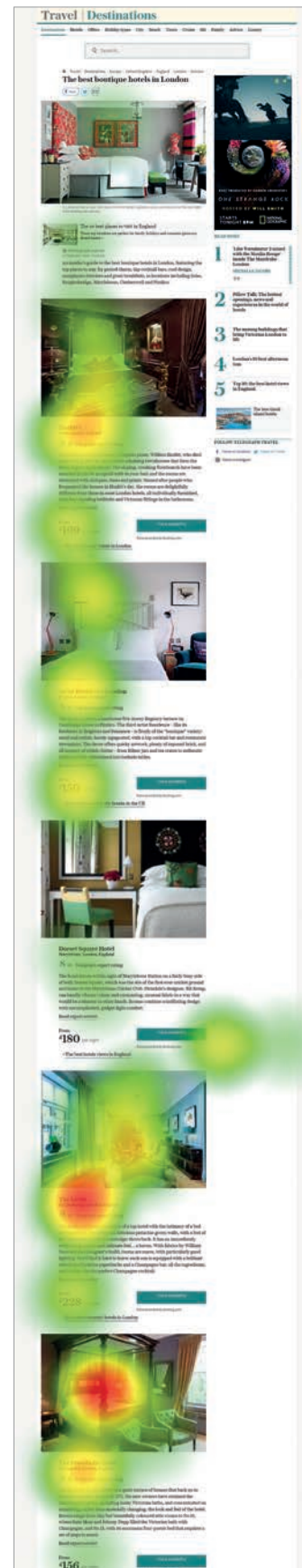
Female Family respondent



What's more, **we saw respondents seek pre-purchase advice and reassurance throughout the search journey.** While some searchers **started** with a 'Top 10' style search result, others visited such informational sources **later** in the search journey. It emerged that in some cases the overwhelming number of products on the familiar, favourite website led to second, third or even fourth click choices on an advice-based piece of content. This kind of search behaviour was particularly observed on search tasks in the furniture, women's fashion and beauty sectors.



Heat map showing a Female Pre-Family respondent's attention when skim reading a Telegraph article about the best boutique hotels in London.



Digging deeper for informational content on the Google SERP

And while the majority of the search tasks we eye-tracked were carried out successfully on Page One of the SERP, we found some cases where the need for information pushed subjects into looking at the second – or even the third - Google page to discover useful recommendations from a credible source.



Watch a respondent's first click journey towards an informational article on the second SERP

"The first page was all 'buy, buy, buy' so I went on the second because I was looking for more information..."

Male Pre-family respondent



See a respondent clicking on informational sources on the second and the third SERP

"It was all very specific things [on the first page] like Center Parcs for example, and I was looking for more general information with a few tips on ... the nicest places to go..."

Male Family respondent

Amending the search query to find out more

For some of our respondents, tackling the search task enthusiastically, they would revisit and amend the search term to get results that more closely matched their needs. Often this behaviour occurred in health and beauty searches, when respondents were keen to discover more facts and benefits.



teeth whitening is it safe



what contains shea butter



Check out a respondent's search journey after amending the 'teeth whitening' search term

The importance of customer reviews in the buying journey

Searchers value impartial, independent advice and views, especially early in the purchase funnel. Our respondents demonstrated this clearly not only by studying the 'official' recommendations provided by newspaper and magazine articles, but also avidly consuming customer reviews. We saw this most often in fashion, furniture and furnishings, travel, restaurants and beauty search tasks.



Watch a mobile respondent reading other customers' reviews about a round dining table

*Find out more about how to earn eyeballs and clicks with great PPC ad copy or Organic meta data on **pages 35 to 37***

#9 Copy Magic

Use great copy to earn eyeballs and clicks

When every click on the Google SERP is so hard-won, expending extra effort on crafting distinctive and memorable words and phrases – to grab vital milliseconds of attention – can be a powerful weapon for search marketers to win more clicks. In our study, we saw respondents attracted to stand-out PPC ad copy and Organic meta data, especially where the search task involved a less familiar or less frequently sought product or service. Respondents asked to search for phrases such as ‘physiotherapy near me’, ‘shea butter’, ‘European river cruises’ and ‘teeth whitening’ often adopted a more considered search behaviour, studying results for longer, and paying attention to copy.

Winning clicks with copy tricks

What’s more, when searching on a mobile device, where scrolling is faster, and skim-reading is even more intensively employed, a single word or phrase can effectively command attention and capture the click. We saw numerous examples of brands capturing interest simply by taking an original copy stance – ‘zigging’ when others were ‘zagging’ – by featuring an offer or price point, or by headlining a benefit that ‘connected’ with the searcher.

On the Google SERP, copy magic happens when you make your headlines and body copy compelling and distinctive – you’ll attract more clicks, and improve your chances of rising in the rankings.

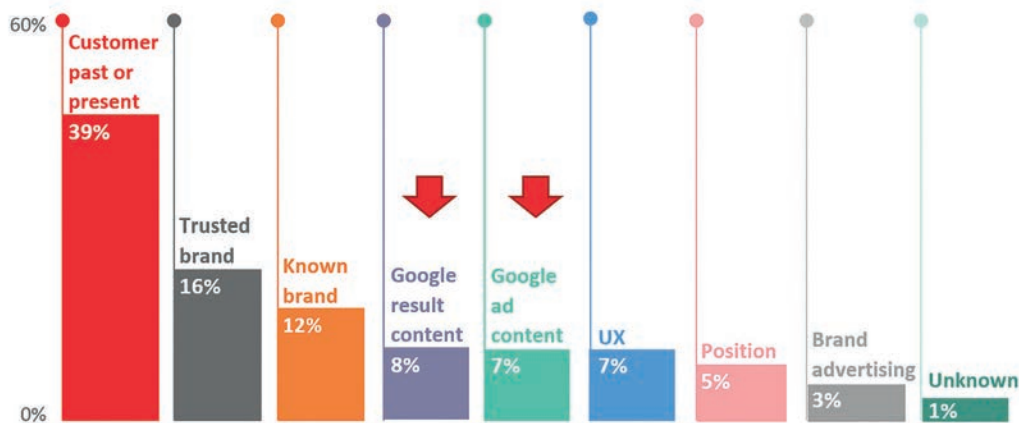
The screenshot shows three search results for car insurance quotes. The first result is from Admiral.com, with a headline 'Car insurance quotes from £236 - Admiral.com' and a URL 'https://www.admiral.com/car-insurance'. The second result is from uSwitch, with a headline 'Car Insurance - compare cheap car insurance quotes | uSwitch' and a URL 'https://www.uswitch.com/car-insurance/'. The third result is from Confused.com, with a headline 'Compare Cheap Car Insurance Quotes at Confused.com' and a URL 'https://www.confused.com/car-insurance'. The Confused.com result includes a star rating of 96% and 3,855 reviews.

Some good ‘stand-out copy’ from Admiral and uSwitch attracted attention from respondents.

Copy content grabs attention in more 'considered' search modes

PPC ad copy and Organic meta data are most effective in searches for unfamiliar or infrequently searched products and services. In our study, 15% of respondents first clicked on a result based on the content, with two thirds of these clicks driven by the copy. This was especially true of male respondents.

In these more considered searches, the average time to first click was 22 seconds, with respondents reading through the SERP results more carefully. This behaviour was much more prominent for unusual searches in sectors which respondents don't check on a regular basis, such as dental, health, cruise or restaurant enquiries.



Reasons for 1st clicks

Sample size: 147 searches (desktop and mobile)



Watch a respondent's sequence of fixations when reading through the SERP results

"Yours Clothing came up first in the results, but I wouldn't necessarily click on whatever comes up first. This one had something in the description that made me feel it's right for me."

Female Family respondent

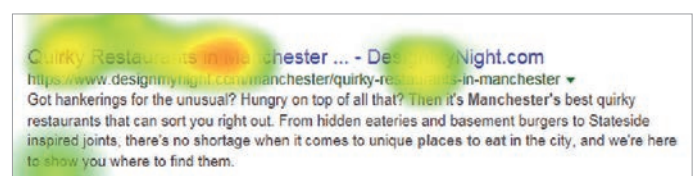
On mobile devices, where searches typically involve more scrolling, consumers tend to skim through the results very quickly. Few mobile searchers carefully read and absorb the copy in PPC ads and Organic results. So, choosing the right words is vital to capture attention in milliseconds! In our study, the quickest time to first click based on an ad's copy was around 4 seconds and it happened on a mobile device.

Use memorable, stand-out words to interrupt scrolling

Some respondents told us they were looking for specific benefits in the results to narrow down the options and match their search expectations. Whether their click is driven by the specific budget they already have in mind - or certain features such as destinations for their next holiday - these respondents will always hunt for words or phrases that resonate with their search objective. Employing interesting, stand-out words and phrases can **help you get noticed and capture the click** from 'considered' searches.

"If I go out in Manchester, I always go for something quirky. The word 'quirky' was mentioned in the result".

Family Post-family respondent



A Female Post-family respondent's attention being caught by the headline of an Organic result.

Adding an offer in your ad can be riveting for the reader

The price point was one of the most mentioned copy-related reasons to click which respondents recalled when they were interviewed. A small but important number of SERP journeys ended up in a click simply because the ad or the result illustrated a price or a discount.

"I went to Planet Cruise because the result's headline was a bit more attractive than on others; it had a 25% off deal mentioned..."

Male Post-family respondent



Watch a respondent's mobile journey towards clicking on an attractive PPC ad

Well-written copy can help overcome urban myths about PPC

In some interviews, respondents told us they had an aversion to PPC ads. Whilst we heard that clicking on a PPC ad could trigger further advertising throughout the buying journey, others thought that a Paid ad makes the advertised product more expensive.

Despite this, when we asked respondents about their motivations, some referenced the PPC ad copy as the reason for clicking on a type of result that they wouldn't normally choose.

"I subconsciously avoid the ones with the "Ads" – just because I don't want to have adverts popping up when I am on a website."

Female Family respondent

"I clicked on the ad at the top because it had a price offer on it, and I thought it's nice to get decent shirts with a discount. I wouldn't have clicked on it otherwise."

Male Family respondent

Topman Men's Shirts | Up To 70% Off Topman Sale | topman.com
www.topman.com/Shirts
 ★★★★★ Rating for topman.com: 4.5 - 509 reviews
 Bring Style Back Into Your Life - Without Breaking The Bank - Up To 70% Off
 Free Delivery Over £50 - 10% Off Your First Order - Up To 70% Off Sale - 10% Student Discount
 Men's Coats · Men's Jumpers · Men's Suits · Men's Jeans · Men's Blazers

T.M.Lewin™ - Mens Check Shirts | Shirts & Ties Only £19.95
www.tmlwin.co.uk/Shirts/Online
 ★★★★★ Rating for tmlwin.co.uk: 4.4 - 9,131 reviews
 Get Free Delivery for any purchase over £30! Buy Men's Shirts Online @ T.M.Lewin™
 Multiple Offers · Free Click & Collect · Award Winning Service · Tailoring Since 1898
 Cufflinks - from £22.50 - To Finish The Look - More
 3 Hardman Street, Manchester Spinningfields, Manchester

Men's Checked Shirts | Let Winter See Who's Boss | jacamo.co.uk
www.jacamo.co.uk/Mens
 ★★★★★ Rating for jacamo.co.uk: 4.5 - 9,262 reviews
 Forget Panic Buying - Start Building Your Winter Wardrobe Today.

Charles Tyrwhitt Official | Check Shirts From Only £22.95 | ctshirts.com
www.ctshirts.com/Mens/Check-Shirts
 Special Introductory Offer: Buy 3 Shirts For £65. Free Delivery With £50 Spend.

Male Family respondent paying attention to the PPC results showcasing attractive prices.

Using copy tricks to squeeze maximum clicks

With every position on Page One of Google so fiercely contested, and every click hard-won, gaining a small competitive edge with striking and memorable copy can be a hugely powerful tactic to win extra clicks. In our study, this proved to be especially effective when respondents were searching in less familiar territory, or for less frequently purchased products and services.

#10 Downstreaming

Gain attention in aggregator-dominated search results

In some of the market sectors we researched, review and comparison sites like MoneySupermarket and TripAdvisor dominated the Google SERP – and took the lion’s share of clicks too. Respondents told us they liked and trusted these sites for a variety of reasons, including ease of use, range and impartiality.

In sectors like Insurance, Restaurants and Hotels, SERP results overwhelmingly favoured these aggregator sites, supplemented by Google Maps, Local Listings and some online newspaper and magazine results – typically ‘Ten Best...’ style articles - with just a few direct brands breaking through onto Page One.

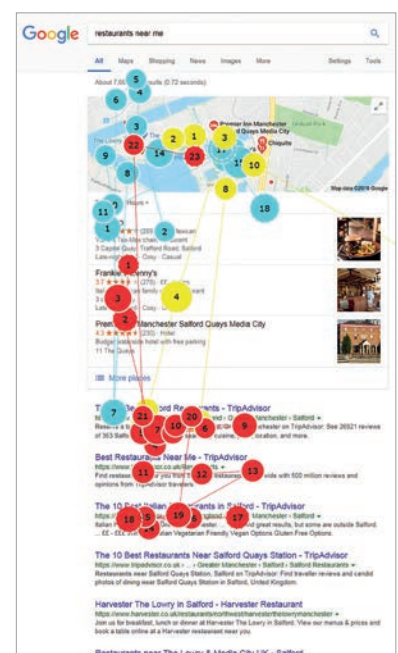
In such circumstances, what can brands do to overcome simply being hostage to the aggregator algorithms and commissions?

Some of the tactics worth considering have already been discussed in earlier chapters – creating stand-out copy, exploiting visual search, and capturing Featured Snippets, for example. Our observations and respondent interviews suggest that focusing on niche and long tail search terms, where the aggregator sites are less prominent on the SERP, is a key tactic for success.

For the Restaurant and Hotel sectors, where every search term has a location qualifier, the Google Maps and Local Pack listing offers a chance to capture the click and bypass the aggregator – optimising Google My Business listings and encouraging Google Reviews is vital here.

In aggregator-dominated sectors, the key to success is not in competing head-on – the sites are so well embedded in search behaviour – but in **‘going downstream’**. On both mobile and desktop devices, consumers are becoming increasingly sophisticated in their search strategies.

Brand marketers can exploit Google's rich search feature set to earn clickshare when faced with strong aggregator competition.



Google Maps offers one ‘downstreaming’ route in a SERP dominated by aggregators.

In the Insurance sector, aggregators offer unrivalled ease of use

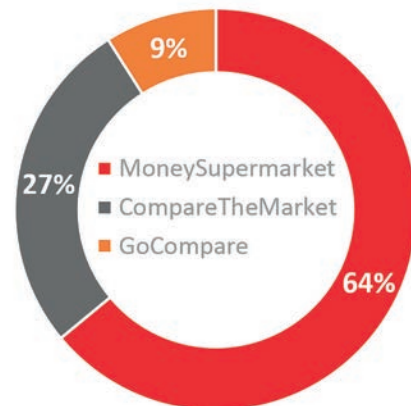
In our Insurance search tasks, the comparison sites MoneySupermarket, CompareTheMarket and GoCompare completely dominated attention and captured 100% clickshare in the case of car insurance, for example! Respondents told us that they actively sought out the aggregator, as they already had an account and found the sites very easy to use. Some wanted to spend as little time as possible searching for what they considered a dull and dreaded annual purchase!

"I want it to take as little time as possible. I've got an account with MoneySupermarket with all my car details... I can quickly buy it and forget about it."

Male Family respondent

"I wouldn't just go blindly on what they (MoneySupermarket) say...I would go back into Google and go direct, as long as they gave me a decent price..."

Male Family respondent



1st click brand choices in the search for car insurance

Sample size: 11 searches (desktop and mobile)

However, over one third of those car insurance searchers, who initially chose a comparison site, told us that they would then go direct to one or more insurers to get quotes. For many, the aggregator represented just the starting point in the purchase journey.

For hotels, restaurants and places to eat, TripAdvisor is trusted

For search tasks like 'luxury hotels London', 'places to eat Manchester' and 'restaurants near me', TripAdvisor took a significant clickshare. Some respondents revealed that they always started here, because they like to look at the reviews and pictures, and they find the site easy to use.

"I trust it [TripAdvisor]. It's very easy to use and they've got reviews and ratings on there and you can book on it too."

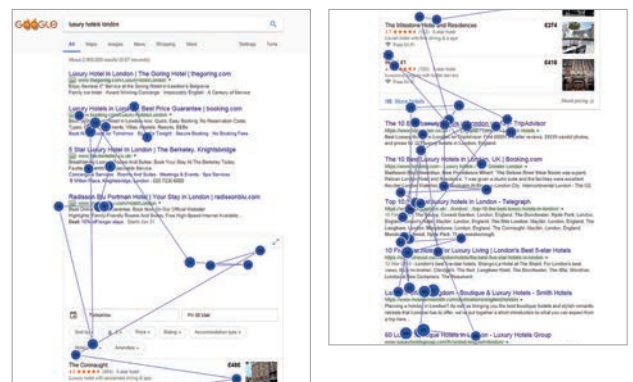
Male Family respondent

"I tend to find that the reviews on TripAdvisor are a fairly good starting point. Then you can start whittling down the places you like, and you can link to the actual websites."

Male Family respondent

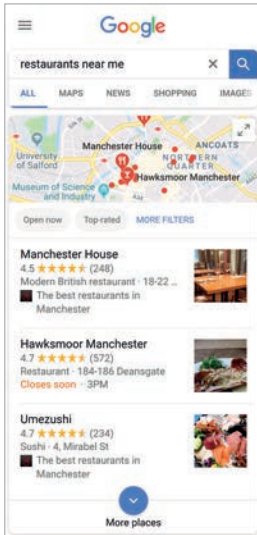
Aggregators succeed with search result headlines that promise a 'short cut' to the best of...

Aggregator sites like TripAdvisor and Booking.com ranked high in Organic search, using tempting headlines like 'The 10 Best Luxury Hotels in London', and this clearly appealed to our respondents, as these Organic search results often captured the click too.

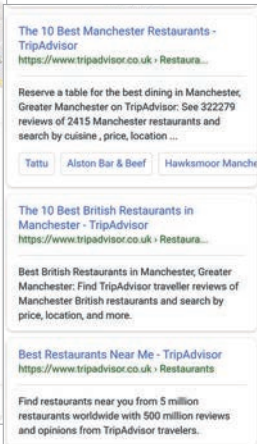


Gazeplot showing one typical searcher carefully considering the PPC ads, the Google Map and the first six Organic results, before opting to investigate further on TripAdvisor.

#10 DOWNSTREAMING | The Evidence



TripAdvisor takes all three top spots on this mobile search for 'restaurants near me'.



Many of our respondents cited ease of use and the user experience as a key driver for choosing comparison, review and aggregator websites. The video below shows how a respondent goes on to quickly and confidently use the filters and the Map facility on TripAdvisor to narrow down his choice of hotels.



See a respondent using TripAdvisor to quickly and easily narrow his choice of hotels

Eating out resulted in a wider range of comparison sites

For search terms like 'places to eat Manchester' and 'restaurants near me', the Google SERP provided a wider choice of aggregators, with TripAdvisor and Time Out sharing space with online magazines like BBC Good Food and local sites like Visit Manchester, Restaurants of Manchester, Design My Night and the Manchester Evening News, which benefited from image and video 'news story' results. The richer range of results on this SERP, sitting alongside the Google Map and Local Pack, led to a wider mix of first click choices.

What's more, although fewer PPC results were present for these search terms, we saw very little attention given to the Paid ads, as **the dominant Google Maps visual immediately drew respondents down the page**. The Google Map itself – and the associated 'Local Pack' of three – took a significant clickshare of search tasks with location-based qualifiers, accounting for 30% of first clicks for 'luxury hotels London', and a full 50% of searches for 'restaurants near me'.



'places to eat Manchester'
Sample size: 13 searches



'restaurants near me'
Sample size: 8 searches

1st click choices in the Restaurants sector



Aggregated heatmap illustrating very little attention to the top of the SERP.

"It's great because you can see everything in one place...restaurants, hotels...for anything like that I would look at Google Maps."

Male Family respondent

The challenge for brands

In searches where comparison and review sites are prevalent – and well-liked by consumers – it can be challenging to earn a place on the SERP. However, in our study, respondents often used other methods to narrow their choices. What's more, in many cases they told us that the aggregator site was only the start of the purchase journey.

Conclusion

Finding the search silver bullet

The research findings we've presented over the preceding pages reveal a snapshot-in-time insight into the interactions between consumers and the Google search engine.

Like you, some of the discoveries we made were things we already suspected.

That trusted, familiar brands win more clicks will be no surprise. That the advanced visual search functionality of Google Maps is much-valued by geo-searchers is predictable. That Google Shopping punches above its weight in ecommerce searches is probably already well-recognised.

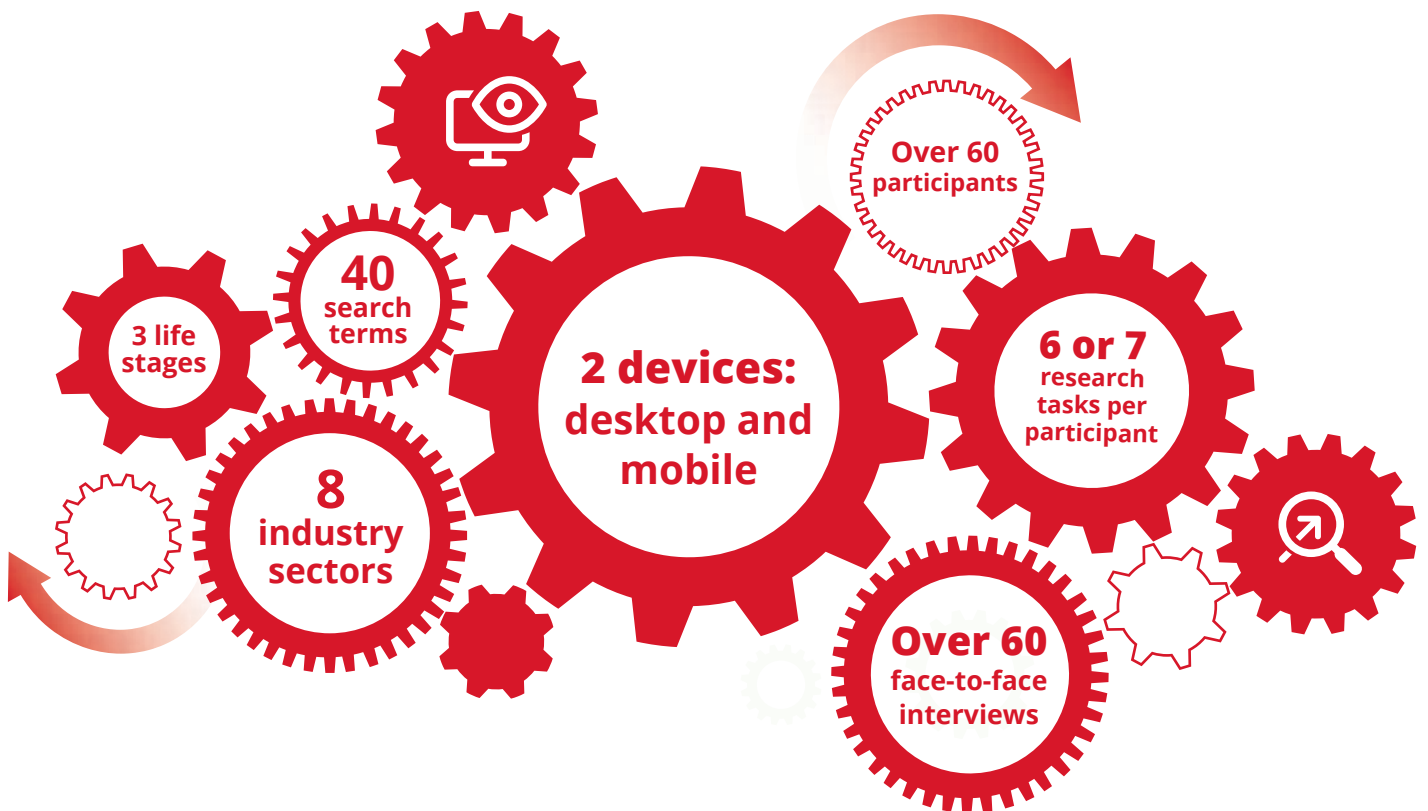
But the sheer scale of features on the Google SERP that our respondents used – and the dexterity with which they used them – well that was surprising.

Consumer search behaviour is adapting. And it is adapting fast. As each new feature is rolled out by Google – Featured Snippets, Image Search, Mobile Carousels, Voice Technology – different **groups of consumers are discovering new means to reach their ideal search result.**

And as Google innovates, and consumers adapt, then search marketers must evolve. There is no longer a simple solution...a 'search silver bullet'. What **The Secret Life of Search** reveals is that search marketing has become a multi-stranded discipline, where the winners will be those brands that can exploit every facet of the search interface simultaneously.

Now is the time to ensure that you are optimising all aspects of your brand presence to earn clickshare in this rapidly evolving digital marketplace.

Methodology



Data collection

This study was designed to help understand how consumers view and use the Google Search Engine Results Pages (SERPs). Therefore, we conducted a qualitative, search behaviour analysis using **eye tracking technology** for both **desktop and mobile** devices.

As a result of undertaking **20-minute eye tracking** sessions with each of the subjects, we have been able to produce and analyse individual and aggregated heatmaps and gaze plots, collate and analyse data from the eye tracking sessions, and create observations based on screen recordings.

In addition to the eye tracking data, we also analysed valuable insights from the **post eye tracking face-to-face interviews**. At the end of each eye tracking session, the respondents were asked about the reasons for making certain search or click decisions, and about their usual online search habits.

Participants, Sectors and Search tasks

We eye tracked the search behaviour of more than **60 respondents**, both male and female, across a range of life stages: **pre-family, family and post-family**.

We asked participants to search on Google using a variety of commonly used search terms across **8 sectors**: Male and Female Fashion, Beauty, Home Furniture and Furnishings, Health, Dental, Hotels and Holidays, Insurance and Restaurants.

We focused on **mid-level search phrases** with at least 5000 monthly searches in the UK, so for example, rather than 'sofa', we asked subjects to search for 'leather corner sofa'.

Each search term was introduced to the respondents with a **research task**, setting the scene for each upcoming search. A couple of examples of research tasks are shown below:

'You've started planning your next family holiday and you'd like to go all-inclusive. Having children, you find this type of holiday suits you all really well. Please use the search term "all inclusive family holidays" to find a holiday to suit your needs.'

'You've been invited to your best friend's birthday party and you don't want to wear any of the dresses you already have in your wardrobe! Please search the term "party dresses uk" to find a dress you would like to buy.'

Each respondent was tasked with carrying out six (on desktop) or seven such searches (on mobile), all **tailored** to their gender, age and life stage.

Limitations

- The aggregated results refer to the data recorded in the first click journey, as this was the only common journey to all searches. Not all the searches resulted in going back to Google and making a second or third click for example.
- Sample size can be small when you narrow down the results to focus on certain variables.
- Dynamic SERPs meant it wasn't possible to create aggregated heatmaps and gaze plots for all subjects.
- It wasn't possible to show fixations on dynamic results and pages, such as People Also Ask drop-downs and Google Maps.
- The eye tracking software wasn't always able to capture the Google Map when it appeared in the SERP.
- The number of mobile respondents was smaller (16) compared to desktop (47).
- Fixations data wasn't available for mobile searches.

About REDC

Red C creates marketing solutions that move people. To click, to call, to read, to buy. When you need to make things happen, we make direct and digital deliver the numbers you need.

As an integrated agency, we help you engage with your customers, cross channel. We take big brand ideas and transform them into personal, one-to-one communications that captivate and compel.



Email

Whether you're looking to get an eCRM programme off the ground, or supercharge one that's floundering, we can help – with strategy, creative, distribution and analysis.



Direct Mail

Our direct mail expertise has been proven over decades. Whether it's door drops, inserts, catalogues or mailpacks... we regularly outperform the control in tests.



Search

Making paid and organic search work requires active and intelligent campaign planning, not automated bid routines and keyword stuffing. If you need more ROI, give our hands-on approach a try.



Eye Tracking

See through your customers' eyes and understand how your marketing works. Eye tracking reveals where and why your marketing materials are most effective – giving you the knowledge you need to optimise efficiently.

To talk to us about your Search Strategy
call **Katy on 0161 872 1361**
or email **kwhittaker@redcmarketing.com**



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