The Branding Value of Search's Page 1

The Emergence of a New Branding Platform

By Nathan Safran, Director of Research

Executive Summary

Marketers have historically turned to print and television offline, and banner advertisements online to achieve brand development goals. In contrast, search marketing has primarily been utilized as a medium to drive traffic and conversions to online web properties. Conductor's research findings show that marketers may need to rethink traditional brand development paradigms, as manufacturers experience substantial lift in brand awareness, brand quality, and purchase consideration when their brand appeared in the search results compared to when it did not. In turn, retailers experience a similar lift in intent to purchase.

Key Findings:

- **Most Significant Brand Lift Occurs When Brand Appears Above the Fold and in Universal Search Results:** The most significant lift to the brand - up to 30% over the baseline - was observed when the brand appeared both above the fold in natural search results and in universal search results (digital assets)
- **Brand Appearing Above the Fold Produces Stronger Lift Than Below:** When the brand appeared above the fold of the search results, lift across all brand measurements was stronger (10%-30%) than when it appeared below
- **Intent to Purchase at Retailer Increases When Brand Appears on Page 1 of the Search Results:** When a retailer appeared in the search results, respondents' intent to purchase at the retailer was increased by 20% when above the fold and 10% when below, compared to when it did not appear in the search results

Marketing Goals Traditionally Closely Tied to Channel

A Marketer's strategic goals in their individual marketing channels have historically been dictated by the channel in which they are operating. Traditional channels such as television and print were primarily used for brand development and consumer influence, while search marketing was strictly used to capture clicks and drive web traffic. These conventions spoke of the established roles each channel played in a branding strategy, where natural search solely delivered conversions and search traffic and other channels were used to deliver on branding development goals.

By now, nearly fifteen years into the practice of search marketing, the industry has diligently investigated the correlation between prominent search rankings and site traffic.

Research such as iCrossing's "The Importance of Page 1 Visibility", and Slingshot SEO's click-through study have effectively and thoroughly correlated strong organic search with traffic and conversion benefits. However, with an almost exclusive focus on the traffic benefits of natural search visibility, the branding potential of appearing in the search engine results have largely been ignored. At Conductor, we hypothesized that exposure to a brand in the natural search listings influences consumer perception of the brand, and we set out to design experimentation to test the theory.

Measuring the long-term brand benefits of appearing in the search results can be both difficult and costly, requiring tracking consumers' brand perceptions over multiple instances in time. By surveying consumers after showing them brand-laden search results, our research will therefore measure the short-term branding benefits in appearing on page one of the search results.

Research Goals

The experiment measured:

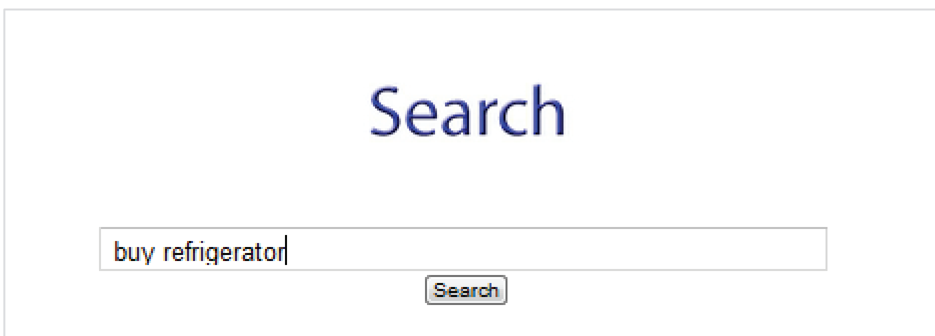
- Brand Awareness
- Perception of Brand Quality
- Purchase Consideration

for a target brand (Frigidaire) in the refrigerator industry. The refrigerator industry was selected for this study due to the likelihood that consumers do not hold strong opinions about refrigerator brands. This is compared to other industries where consumers are likely to develop loyalties to a particular manufacturer, such as the automotive industry.

In addition to measuring the brand lift for a consumer manufacturer (Frigidaire), we also measured the impact of the search results on consumer purchase proclivity for a retailer (Best Buy). By doing so, we were able to measure the brand impact of the search results for both manufacturers and retailers.

Methodology

1. In a controlled lab environment, respondents were directed to an internal search page where they were asked to enter the keyword ‘buy refrigerator’:



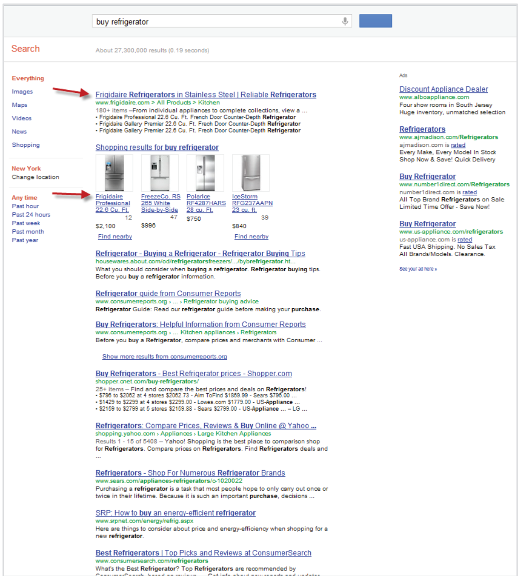
2. After clicking the ‘Search’ button, users were shown a customized search results page hosted on a Conductor-owned domain. Modeled after the Google search results page for ‘buy refrigerator’, the only modification made was to insert our target brand(s) in the results.

   Respondents were divided into five groups, 250 per group, that saw a customized search results page, with the brand positioned based on categorization:

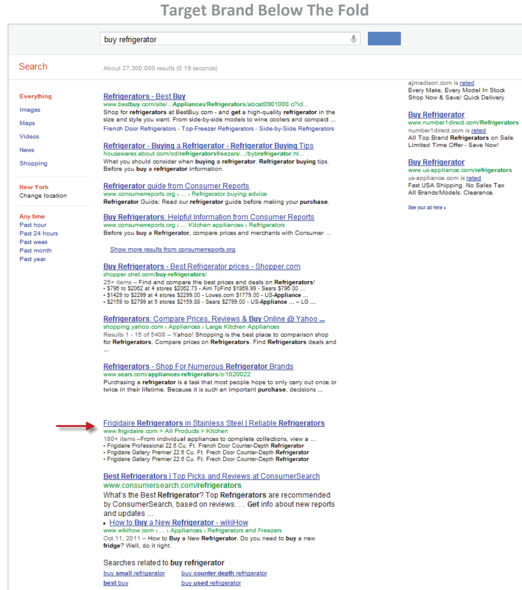
   - **No brand** in the search results (control group)
   - Brand **above** the fold
   - Brand **below** the fold
   - Brand **above** the fold and in **universal results**
   - Brand **above** the fold and in **PPC**

Example of search results pages modified to position target brand in search results

Target Brand Above the Fold with Universal Results



Target Brand Below The Fold



3. After viewing the customized search results, respondents were asked a series of questions that tested for:
    - Refrigerator Brand Awareness
    - Refrigerator Perception of Quality
    - Refrigerator Purchase Consideration
    - Retail Intent to Purchase

For each question, respondents were asked to rank ten refrigerator brands on a scale of 1-10, with 10 being the highest. For example, the brand awareness portion of the survey asked respondents to:

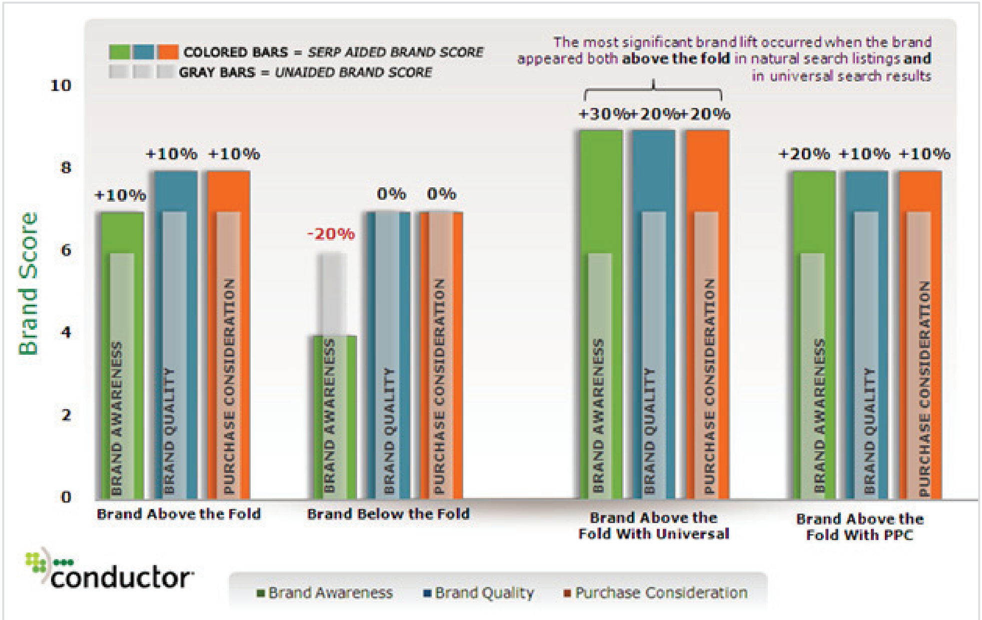
Order the following brands by weakest (1) to strongest (10) association with refrigerators. No two brands can have the same numerical ranking.

The grouping of respondents into five distinct categories enabled the measurement of the target brand score (Frigidaire) based on its position in the search results. Participants who were not exposed to any brands in the SERPs served as the baseline against which lift could be calculated.

*See Appendix for survey questions, lists of brands used in the survey, and further detail about research methodology

The Results: Substantial Manufacturer Brand Lift When Appearing in the Search Results

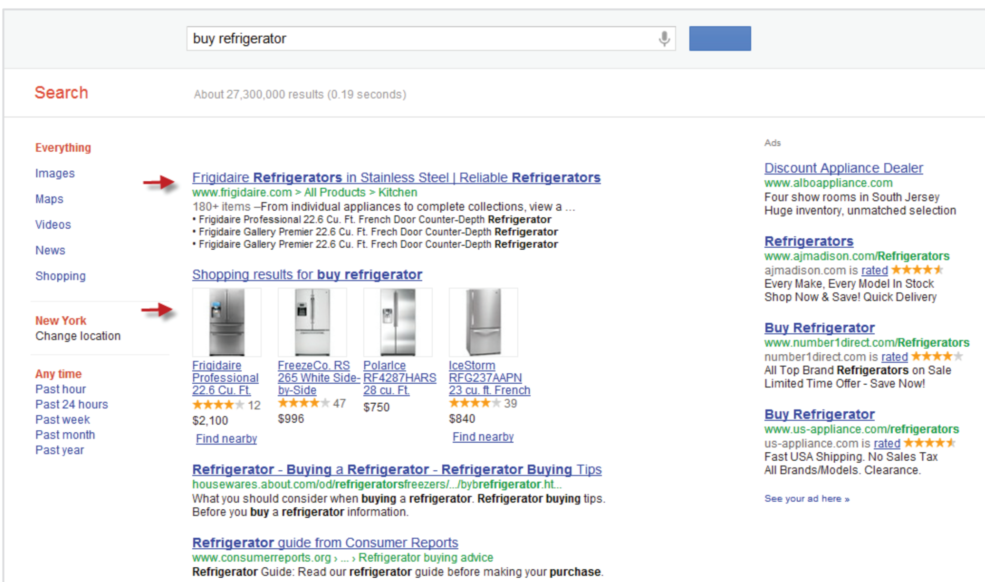
Overall, appearing in the search results gave the target brand between a 10%-30% brand lift over the baseline score, where respondents did not see a brand in the search results.



Further analysis of the data showed:

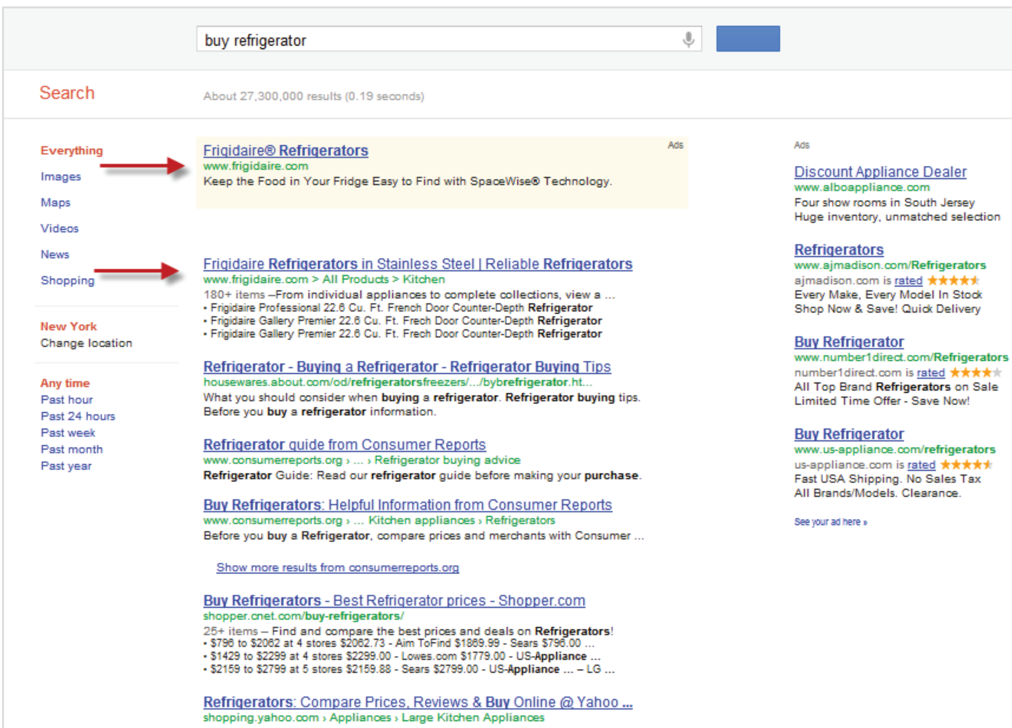
- **Most Significant Lift Occurs When Brand Above the Fold and in Universal:** The most significant lift (30%) occurred when the brand appeared both above the fold in natural search results and in universal search results. This is likely due to the searcher being exposed to the brand both above the fold, where eye-tracking studies have shown the majority of searcher attention is given, and in the universal search results where the brand is represented visually.

Manufacturer Above the Fold and in Universal Listings



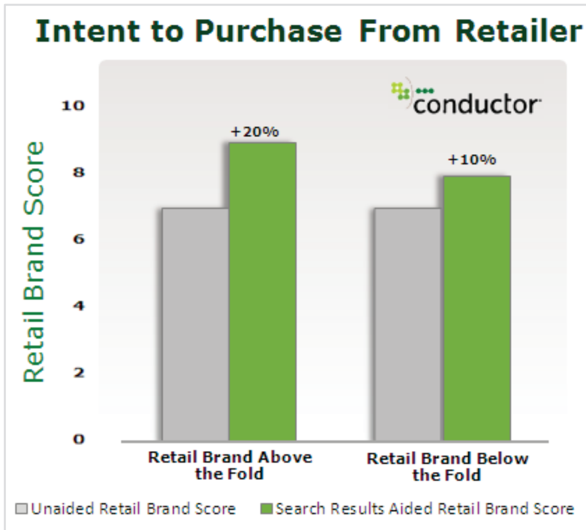
- **Brand Lift Stronger When Appearing Above the Fold Than Below:** When the manufacturer brand appeared above the fold of the search results, lift across all brand measurements was between 10%-30%. When the manufacturer brand appeared below the fold, brand measurement scores for Frigidaire were flat or actually declined slightly for brand awareness.
- **PPC With Organic Results Above the Fold Increases Brand Awareness:** When the brand appeared in paid search (PPC) together with natural search results above the fold, brand awareness scores increased by 20% above the baseline and 10% when appearing only in natural search. However, the addition of the brand appearing in PPC together with natural search listings did not provide any lift to Brand quality and purchase consideration scores.

Manufacturer Above the Fold with PPC

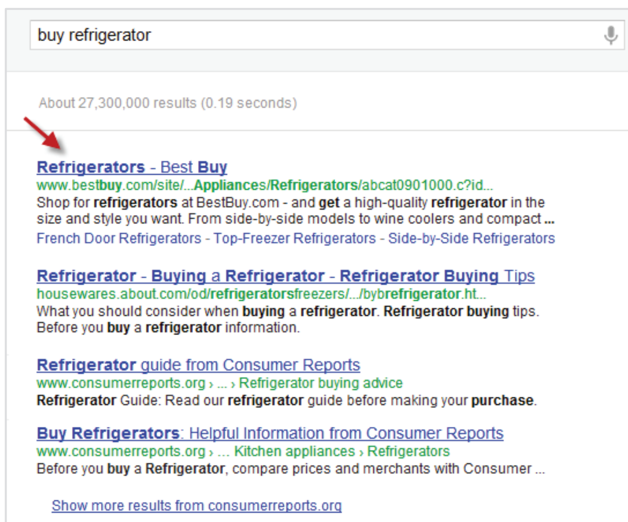


Lift in Purchase Consideration for Retailer When Appearing in the Search Results

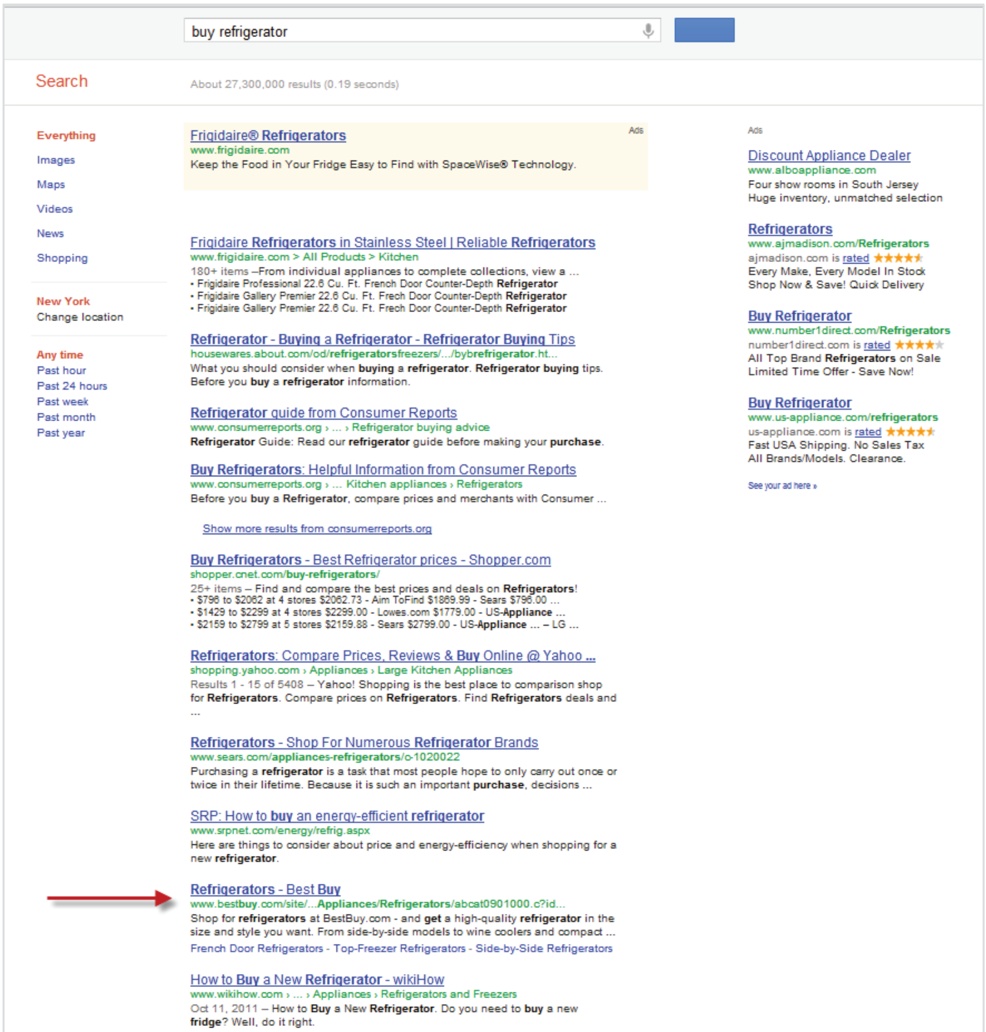
Shifting from manufacturer brand lift to retailer brand lift due to search, overall, we observed a 10% to 20% lift over the baseline, when respondents saw the retailer brand in the search results compared to when they didn't. Like manufacturers, the brand lift was significantly higher (2x more) when the brand appeared above the fold compared to below.



Retailer Above the Fold



Retailer Below the Fold



A New Brand Development Paradigm for Marketers

Although marketers have traditionally turned offline to television and print media, and online to banner ads to achieve their brand development goals, Conductor's research suggests this longstanding paradigm may now be turned on its head. The substantial lift in brand awareness, brand quality, and purchase consideration scores for both manufacturers and retailers when their brand appears in the search results suggests brand owners should seriously consider search as valuable medium for brand development.

conductor

Appendix

Survey Questions:

1. Brand Association

Note: Order the following brands by weakest (1) to strongest (10) association with refrigerators. No two brands can have the same numerical ranking. Responses will not be accepted if each brand does not have a unique ranking from 1-10.

- Amana
- Electrolux
- Frigidaire
- GE
- Jenn-Air
- Kenmore
- LG
- Samsung
- Sub-Zero
- Whirlpool

2. Brand Quality

- What is your perception of quality for each of the following brands of refrigerators?

Note: Order the following brands from 1-10 by lowest perceived quality (1) to highest perceived quality (10). No two brands can have the same numerical ranking. Responses will not be accepted if each brand does not have a unique ranking from 1-10.

(Respondents were shown the same brand list as above)

3. Purchase Consideration

- If you were buying a refrigerator, which brands would you most likely consider purchasing?

Note: Order the following brands from least likely to purchase (1) to most likely to purchase (10). No two brands can have the same numerical ranking. Responses will not be accepted if each brand does not have a unique ranking from 1-10.

(Respondents were shown the same brand list as above)

4. Retail Preference

- Assuming you were in the market to buy a refrigerator and all stores were equidistant from you, order the following 10 retailers in the order in which you would make your purchase. (1= least likely to purchase from, 10= most likely to purchase from).

Note: Order the following retailers from least likely to purchase from (1) to most likely to purchase from (10). No two retailers can have the same numerical ranking. Responses will not be accepted if each brand does not have a unique ranking from 1-10.

- Amazon
- Best Buy
- Costco
- Ebay
- Home Depot
- Ikea
- Lowes

- Newegg
- Sam's Club
- Sears

Sample Size:

- Two hundred and fifty respondents were polled for each of the five sections, totaling 1,250 study participants.
- In creating the customized search results, care was taken to keep the search results pages as close to a 'Google' search results page in look and feel as possible, in addition to removing proprietary logos.