

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:

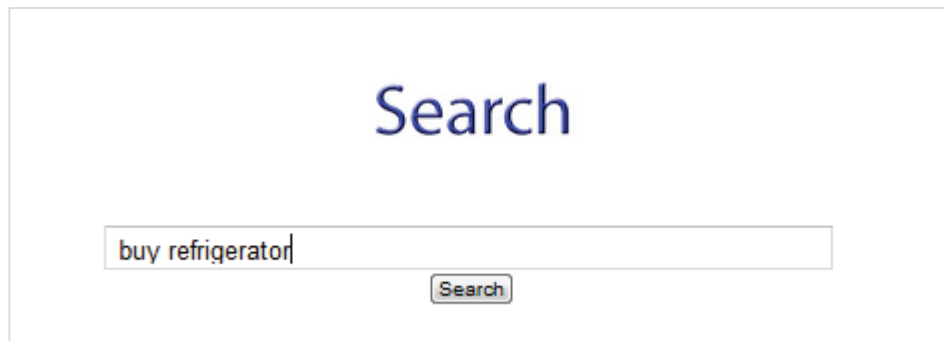
- Brand Awareness
- Perception of Brand Quality
- Purchase Consideration

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':



The image shows a search interface. At the top, the word "Search" is displayed in a large, blue, sans-serif font. Below it is a search input field with a thin border, containing the text "buy refrigerator". To the right of the input field is a button labeled "Search" in a small, black, sans-serif font.

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**

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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.

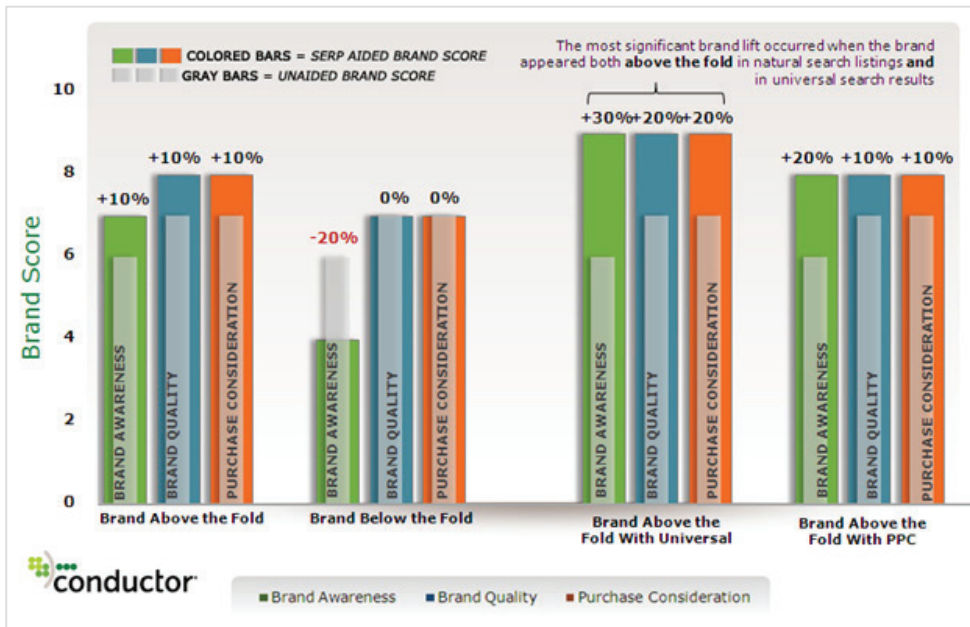
The grouping of respondents into five distinct categories enabled the measurement of the target brand score (Frigidaire) based on its position in the search results. Participants who were not exposed to any brands in the SERPs served as the baseline against which lift could be calculated.

*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.

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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

The screenshot shows a search engine results page for the query "buy refrigerator". The search results include a list of products with their prices and ratings, and several advertisements. The products listed are:

Product	Price	Rating
Frigidaire Professional 22.6 Cu. Ft.	\$2,100	★★★★☆ 12
FreezeCo. RS 205 White Side-by-Side	\$996	★★★★☆ 47
Polarice RF4287HARS 28 cu. Ft.	\$750	★★★★☆ 39
IceStorm RC-G237AAPN 23 cu. ft. French	\$840	★★★★☆ 39

The advertisements include:

- Discount Appliance Dealer (www.alboappliance.com)
- Refrigerators (www.ajmadison.com/Refrigerators)
- Buy Refrigerator (www.number1direct.com/Refrigerators)
- Buy Refrigerator (www.us-appliance.com/refrigerators)

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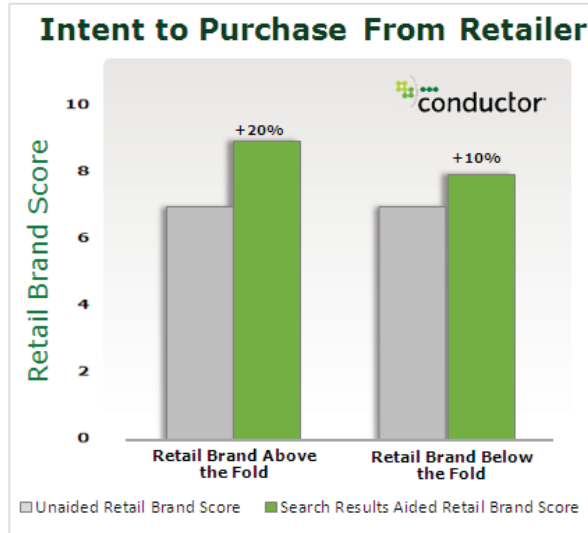
- **Brand Lift Stronger When Appearing Above the Fold Than Below:** When the manufacturer brand appeared above the fold of the search results, lift across all brand measurements was between 10%-30%. When the manufacturer brand appeared below the fold, brand measurement scores for Frigidaire were flat 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

The screenshot shows a search engine results page for the query "buy refrigerator". The search bar at the top contains the text "buy refrigerator" and a search button. Below the search bar, the results are displayed. On the left side, there is a navigation menu with options: "Everything", "Images", "Maps", "Videos", "News", "Shopping", "New York", "Change location", "Any time", "Past hour", "Past 24 hours", "Past week", "Past month", and "Past year". The main content area shows several search results. The first result is a paid advertisement for "Frigidaire® Refrigerators" from www.frigidaire.com, with the headline "Keep the Food in Your Fridge Easy to Find with SpaceWise® Technology." This ad is highlighted with a yellow background and has a red arrow pointing to it from the "Everything" category in the navigation menu. Below the ad, there are several organic search results, including "Frigidaire Refrigerators in Stainless Steel | Reliable Refrigerators" from www.frigidaire.com, "Refrigerator - Buying a Refrigerator - Refrigerator Buying Tips" from housewares.about.com, "Refrigerator guide from Consumer Reports" from www.consumerreports.org, "Buy Refrigerators: Helpful Information from Consumer Reports" from www.consumerreports.org, "Buy Refrigerators - Best Refrigerator prices - Shopper.com" from shopper.cnet.com, and "Refrigerators: Compare Prices, Reviews & Buy Online @ Yahoo ..." from shopping.yahoo.com. On the right side of the page, there are several sponsored links for "Discount Appliance Dealer", "Refrigerators", "Buy Refrigerator", and "Buy Refrigerator".

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

buy refrigerator

About 27,300,000 results (0.19 seconds)

Refrigerators - Best Buy
www.bestbuy.com/site/...Appliances/Refrigerators/abcat0901000.c?id...
Shop for **refrigerators** at BestBuy.com - and **get** a high-quality **refrigerator** in the size and style you want. From side-by-side models to wine coolers and compact...
French Door Refrigerators - Top-Freezer Refrigerators - Side-by-Side Refrigerators

Refrigerator - Buying a Refrigerator - Refrigerator Buying Tips
housewares.about.com/od/refrigeratorsfreezers/.../byrefrigerator.ht...
What you should consider when **buying** a **refrigerator**. **Refrigerator buying tips**. Before you **buy** a **refrigerator** information.

Refrigerator guide from Consumer Reports
www.consumerreports.org > ... > Refrigerator buying advice
Refrigerator Guide: Read our **refrigerator** guide before making your **purchase**.

Buy Refrigerators: Helpful Information from Consumer Reports
www.consumerreports.org > ... > Kitchen appliances > Refrigerators
Before you **buy** a **Refrigerator**, compare prices and merchants with Consumer ...

[Show more results from consumerreports.org](#)

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Retailer Below the Fold

The screenshot shows a search engine results page for the query "buy refrigerator". The search bar at the top indicates "About 27,300,000 results (0.19 seconds)". On the left, there are navigation filters for "Everything", "Images", "Maps", "Videos", "News", "Shopping", "New York", "Any time", "Past hour", "Past 24 hours", "Past week", "Past month", and "Past year". The main results area contains several entries:

- Advertisement:** Frigidaire® Refrigerators. www.frigidaire.com. Keep the Food in Your Fridge Easy to Find with SpaceWise® Technology.
- Advertisement:** Discount Appliance Dealer. www.alboappliance.com. Four show rooms in South Jersey. Huge inventory, unmatched selection.
- Advertisement:** Refrigerators. www.ajmadison.com/Refrigerators. ajmadison.com is rated ★★★★★. Every Make, Every Model In Stock. Shop Now & Save! Quick Delivery.
- Advertisement:** Buy Refrigerator. www.number1direct.com/Refrigerators. number1direct.com is rated ★★★★★. All Top Brand Refrigerators on Sale. Limited Time Offer - Save Now!
- Advertisement:** Buy Refrigerator. www.us-appliance.com/refrigerators. us-appliance.com is rated ★★★★★. Fast USA Shipping. No Sales Tax. All Brands/Models. Clearance.
- Search Result:** Frigidaire Refrigerators in Stainless Steel | Reliable Refrigerators. www.frigidaire.com > All Products > Kitchen. 180+ items - From individual appliances to complete collections, view a ...
 - Frigidaire Professional 22.6 Cu. Ft. French Door Counter-Depth Refrigerator
 - Frigidaire Gallery Premier 22.6 Cu. Ft. French Door Counter-Depth Refrigerator
 - Frigidaire Gallery Premier 22.6 Cu. Ft. French Door Counter-Depth Refrigerator
- Search Result:** Refrigerator - Buying a Refrigerator - Refrigerator Buying Tips. housewares.about.com/od/refrigerators/freezers/...byrefrigerator.ht... What you should consider when buying a refrigerator. Refrigerator buying tips. Before you buy a refrigerator information.
- Search Result:** Refrigerator guide from Consumer Reports. www.consumerreports.org > ... > Refrigerator buying advice. Refrigerator Guide: Read our refrigerator guide before making your purchase.
- Search Result:** Buy Refrigerators: Helpful Information from Consumer Reports. www.consumerreports.org > ... > Kitchen appliances > Refrigerators. Before you buy a Refrigerator, compare prices and merchants with Consumer ...
- Search Result:** Buy Refrigerators - Best Refrigerator prices - Shopper.com. shopper.cnet.com/buy-refrigerators/. 25+ items - Find and compare the best prices and deals on Refrigerators!
 - \$1761 to \$2062 at 4 stores \$2002.73 - Aim To Find \$1969.99 - Sears \$196.00 ...
 - \$1429 to \$2259 at 4 stores \$2259.00 - Lowes.com \$1779.00 - US-Appliance ...
 - \$2169 to \$2799 at 5 stores \$2169.88 - Sears \$2799.00 - US-Appliance ... - LG ...
- Search Result:** Refrigerators: Compare Prices, Reviews & Buy Online @ Yahoo... shopping.yahoo.com > Appliances > Large Kitchen Appliances. Results 1 - 15 of 5408 - Yahoo! Shopping is the best place to comparison shop for Refrigerators. Compare prices on Refrigerators. Find Refrigerators deals and ...
- Search Result:** Refrigerators - Shop For Numerous Refrigerator Brands. www.sears.com/appliances-refrigerators/o-1020022. Purchasing a refrigerator is a task that most people hope to only carry out once or twice in their lifetime. Because it is such an important purchase, decisions ...
- Search Result:** SRP: How to buy an energy-efficient refrigerator. www.srpnet.com/energy/refrig.aspx. Here are things to consider about price and energy-efficiency when shopping for a new refrigerator.
- Search Result:** Refrigerators - Best Buy. www.bestbuy.com/site/.../Appliances/Refrigerators/abcat0901000.c?iid... Shop for refrigerators at BestBuy.com - and get a high-quality refrigerator in the size and style you want. From side-by-side models to wine coolers and compact ... French Door Refrigerators - Top-Freezer Refrigerators - Side-by-Side Refrigerators
- Search Result:** How to Buy a New Refrigerator - wikiHow. www.wikihow.com > ... > Appliances > Refrigerators and Freezers. Oct 11, 2011 - How to Buy a New Refrigerator. Do you need to buy a new fridge? Well, do it right.

A red arrow points to the Best Buy result.

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.

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

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- 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.