Into the Mind of the Searcher

A Research Initiative by

ENQUIRO

Prepared by:

Gord Hotchkiss

Research Assistants:

Glenna Lennox
Catherine Devine
Scott Murray
Barb Newman
Rob Sullivan
Gerard Manning
Meghan Currie
Trina Amiot
Jody Nimetz
Scott Campbell
Brandi Massey
Petra Leinemann
Bill Barnes
Jason Lane

Table of Contents

Executive Summary

At Enquiro, we undertook a research project to allow us to glimpse inside the mind of the searcher during a typical consumer based interaction. Through an enhanced focus group format, we observed the search behaviors of 24 participants and had the chance to interview them extensively about their thoughts and reactions to what they saw online.

The group was relatively demographically diverse, given the restrictions of the sample size. We saw some correlation in many findings with that of a much broader research initiative, involving an online survey with over 400 participants.

A number of significant findings were identified. As we suspected, we found that search engines are much more likely to be used during the research or consideration phase of the buying cycle. And we found some distinct differences in search behaviors in researchers versus buyers, as well as men vs women.

It became clear that searchers have mentally divided the search engine results page into distinct sections, and many searchers will skip some of these sections completely. In general, organic listings are more likely to be seen by a greater percentage of users than sponsored listings. It also emerged that many Google users have become preconditioned to visually ignore sponsored listings on the page.

The search process is also much more complex than many of us assume. A typical search interaction involves many opportunities to look at the results page and individual sites. The search query is refined a number of times (generally becoming more specific) and the opportunity to introduce brand occurs early and repeatedly in the search funnel. Interaction with search results early in the process can dramatically affect the search process, taking it in totally new directions.

When looking at the search results page, most users look for a number of specific items, at least one of which must be present to capture a click through. These items include the key phrase in the title or description, product information and trusted brand names and vendors.

Finally, 4 distinct types of searchers were identified, each with a unique search pattern. These were: The Scan and Clicker, the 2 Step Scanner, the Deliberate Researcher and the 1,2,3 Searcher. The distinct behaviors of each group can dramatically impact the success of a search marketing campaign. We found that these search patterns affected the types of sites clicked on, the parts of the search results page seen, the time taken to decide on a site and the likelihood of conversion once a prospect visited a site.

Enquiro believes the results of the focus group points out the need for more marketers to do similar extensive behavior analysis with their target customers, especially in the area of search engine and website interactions.

Methodology

Objective: To gain a better understanding of searching patterns and site interactions during the consideration phase of the buying cycle for items in various price ranges.

Target Consumer Group: Consumers likely to use the Internet to research a buying decision

Method: Ask a limited number of participants to participate in a controlled experiment as outlined below.

We asked 24 participants (in three separate sessions) to visit our computer lab. These participants were pre-qualified with the following questions:

1. Do you use the Internet more than 3 times a week?
2. If yes, do you use Internet search engines more than 3 times a week?
3. If yes, have you used Internet search engines to conduct research on items or services you wish to buy?

Once we identified the participants, they were asked to complete a quick survey (5 to 7 minutes) that identified the following:

- Past experience with the Internet
- Frequency of usage
- Type of usage
- Areas of interest
- Favored search engines
- Why they like this search engine
- Awareness of sponsored listings
- Age
- Education
- Income level

Following completion of the quiz, we briefed the participants on the nature of the test.

We presented two search scenarios:

1. You have been given $200 to spend and will be using the internet to help you find an item to purchase. This can't be an item you've previously been researching.
2. You have a budget of $5000 to spend. It can be spent on anything: consumer electronics, computers, clothing, a trip, etc. Use the internet to help find what you're going to spend it on. Again, this can't be anything you've previously done research on.

We left it to the participant's discretion to choose what they wanted to search for, because providing them with a predetermined search scenario might bias results.

Participants were asked to use the internet as they would normally.

We then gave the participants the chance to ask any questions. After this, they were paired with their team member and assigned a computer.

The team member asked a few quick questions to determine what their participant was searching for, to make sure the choice would provide valid results. The participant was then free to start the research process.

Each computer had a screen recorder installed that recorded all on screen activity. The person was allowed to conduct their research unobserved, but was made aware that activity was being recorded. We allowed approximately 30 minutes for each scenario if required.

After the search scenarios, each participant was paired with a team member. The team members reviewed the participant's research activity, with the ability to stop the recorded activity and ask questions at any time. The questions focused on trying to determine the participant's motivation in choosing sites and paths, their objections to other options, their interpretation of web sites and search engine results pages, etc. In short, we tried to determine what was going through their mind at the time. These observations were recorded by the team member.

Finally, copies of all recorded activity and observations were compiled for summary analysis.

Demographics of group

Past experience with the Internet

16.6%	Limited Experience
8.3%	Some Experience
20.8%	Relatively Experienced
54.3%	Very Experienced

Gender

58%	Male
42%	Female

Age

45.8%	20 – 29
16.6%	30 – 39
12.5%	40 – 49
16.6%	50 – 59
4.2%	60 +

Education

Some High School	4.2%
High School Diploma or Equivalent	29.2%
College Diploma	33.3%
University Degree	29.2%
Masters or Doctorate	4.2%

Income

Less than 15 K	12.5%
15 – 30 K	20.8%
30 – 45K	20.8%
45 – 60 K	8.3%
60 – 75 K	4.2%
75 K +	16.6%
Declined to Answer	16.6%

Favored Search Engine

Google – 70.8%
MSN – 16.6%
Yahoo – 12.5%

Apparent discrepancy with other Search Engine Market Share Ratings

These numbers seem somewhat at odds with the Nielsen NetRatings, MediaMetrix and StatMarket numbers. The latest numbers posted to Searchenginewatch show a much lower percentage of the search market owned by Google than do ours. This is shown below.

Engine	Focus Group	Nielsen NetRatings	MediaMetrix	StatMarket
Google	70.8%	39.4%	35%	32%
MSN	16.6%	29.6%	15%	13%
Yahoo	12.5%	30.4%	28%	36%

Source: Searchenginewatch.com March 2004

There's a couple of items to bear in mind here. The sample size of this focus group would mean a relatively low statistical accuracy confidence level. However, it is worth noting that the numbers we found are roughly the same as we found in our online survey, which had over 400 respondents and a confidence level of 19 times out of 20, +/- 5%.

Another reason for the discrepancy can be found in the way the question was phrased to the focus group. We asked participants to state their search engine of choice, while the others record actual search engine usage. For a number of reasons, including the two listed below, we have found that these two can vary.

Convenience searches

Engines that are combined with a portal site, such as MSN and AOL, receive a high number of convenience searches, because the search utility in incorporated right into the portal design and doesn't require going to a separate site, such as Google. Also, these portals are often set as a user's home page, and a number of searches are launched from them at the beginning of a browser session. Our numbers are more valid if you look at what search engine would be chosen if a user isn't currently on a home page that offers search functionality.

It was also interesting to note that 4 of the participants (representing over 16% of the total) had changed their browser home page to Google.

Fall back searches

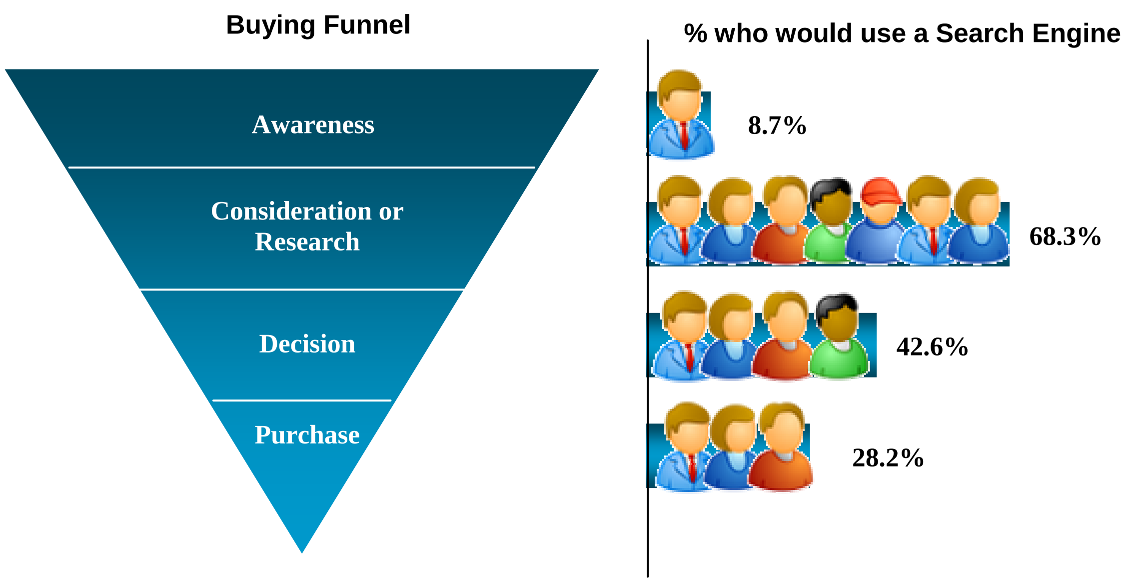
Also, we found that a fairly high percentage of users (almost 60%) have a stated engine of preference, but will use another engine if they're not satisfied with the results from the first engine. So, although users may give Google as their engine of preference, they may actually use another engine, such as Yahoo or MSN, for a significant percentage of their searches.

Researchers vs Buyers

We found distinctive differences in both research initiatives in the way searches are actually conducted, depending on whether users are in the buying or research phase.

Mapping against the buying funnel

Preliminary findings from the survey show that users are much more likely to use a search engine during the research phase of the buying funnel. Usage of search engines drops off as the user draws closer to the actual purchase transaction. This was echoed in the focus group, where 68% of participants indicated they would use a search engine to help research a purchase, but only 41% indicated that they would purchase an item online, and only 28% indicated they would use a search engine to help them make this purchase.



Familiar vs Non Familiar

We also found differences in usage based on the level of familiarity the searcher had with the product or potential vendors of the product. If there was a high level of familiarity, the searcher would often bypass search engines altogether and go right to a vendor's site, or use a trusted vendor's site in conjunction with a search engine.

For example, a number of participants decided to purchase a piece of consumer electronics, such as an MP3 player. Over 60% of these went to the site of a well known electronics retailer and did product research on that site, and then used a search engine to find additional information such as consumer reports or reviews.

Another example was when participants wanted to search for vacation opportunities. Often they went directly to a travel portal and, in many cases, never did use a search engine.

However, in instances where there was no predetermined positioning of a vendor or a product and little familiarity with either, search engines were used extensively and were the predominant channel for product research.

Big Ticket vs Small Ticket

Differences in search engine usage were also observed in instances involving research for large and small ticket items.

In big ticket purchases, there is likely extensive research done, often involving multiple online research sessions and repeated use of search engines. The search process and the queries used are usually much more involved and diverse than in smaller ticket purchases. We also found that the nature of this process depends greatly on the type of searcher and even gender (see Men vs Women). Scan and Clickers and Two Step Scanners generally make decisions faster and spend less time during the research process than Deliberate Researchers and 1,2,3 Searchers. (For more about distinct types of searchers, see Types of Searchers)

Finally, with big ticket items, the path to conversion is much longer and there is a high likelihood that the conversion will happen offline. Generally, we found vendors giving researchers the opportunity to gather more information in what appeared to be an unbiased, non threatening way were much more likely to capture a conversion than those with a more overt sales message. For example, offering a product brochure, a vacation planning guide, or competitive comparison charts were all conversion methods likely to attract a researcher. We cover more about observed conversion behavior in Post Click Behaviors and the Anonymity Threshold.

In cases of small ticket purchases, there would generally only be one online research session and the path to conversion is much shorter and more direct. There is also a greater likelihood of online conversion. Again, we found that Scan and Clickers and 2 Step Scanners tend to make decisions much faster then did Deliberate Researchers and 1,2,3 searchers.

Men vs Women

We noted a marked variance in the search patterns of men and women generally. On the average, men make decisions quicker, spend less time on sites, are more likely to have pre-established “favored” vendor sites that they use in the search process and show less resistance to sponsored listings. Women tended to be more deliberate in reading search results, spend more time with their searches and spend more time on sites before making decisions.

Although we’re speaking of genders as an aggregate group here, the main reason for the variance is the relatively high incidence of Scan and Clickers and 2 Step Scanners in the male participants in the group. No women participating in the session matched either of these profiles. We believe this is an anomaly based on the small size of the sample, but we do believe these two profiles are much more likely to be male.

In the Deliberate Researcher profile, although there was a higher percentage of females, we did find a number of males. And again, in our group, the 1,2,3 searchers were, with one exception, all female.

This marked variation in search patterns has to be understood by marketers in formulating their marketing plans. When looking for reasons why women as a group appear to search differently than men, we believe the reason is analogous to distinct shopping patterns in both genders. For the sake of clarity, think about shoppers entering a mall. Some go directly to a store, buy an item and leave. When applying this behaviour to a search engine, these would be similar to the Scan and Clickers or the 2 Step Scanners. Others shop several stores, compare prices and deliberate over the buying decision. These individuals enjoy the shopping experience. Again, drawing parallels to the search profiles, this group would be similar to the Deliberate Researchers or the 1,2,3 Searchers. I think most agree that the first group is generally predominantly male, while the second group is predominantly female. Understanding the different searching (and shopping) patterns in a target customer group is essential to formulating an effective strategy.

Interaction with the search results page

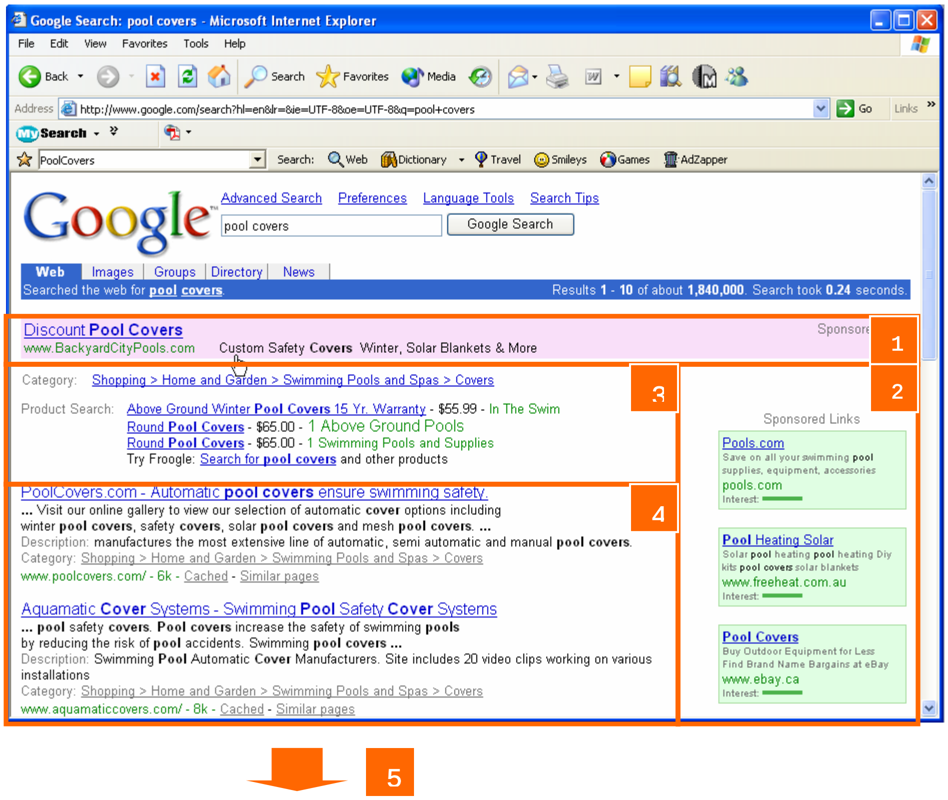
It became clear in the searchers mind, the search results page is divided into distinct sections, and searchers may entirely ignore or skip over some of these sections during their interaction with the search page.

In general we found the majority of users in the group were pretty clear about what was a sponsored link and what was an organic link on the page. Only 20% of participants had some confusion, and this tended to be among the less experienced search engine users. However, there is still a lingering suspicion amongst almost 50% of the users that even organic results are determined in part by how much advertisers are willing to pay. In other words, 1 out of 2 people believe that all search results are tainted to some extent by commercialism.

We also found that Google users tended to have the best understanding of which were paid and what were organic results. As we see in "Why They Ignored Sponsored Listings", this plays a part in the Google user's higher resistance to paid advertising.

Search Page Sections

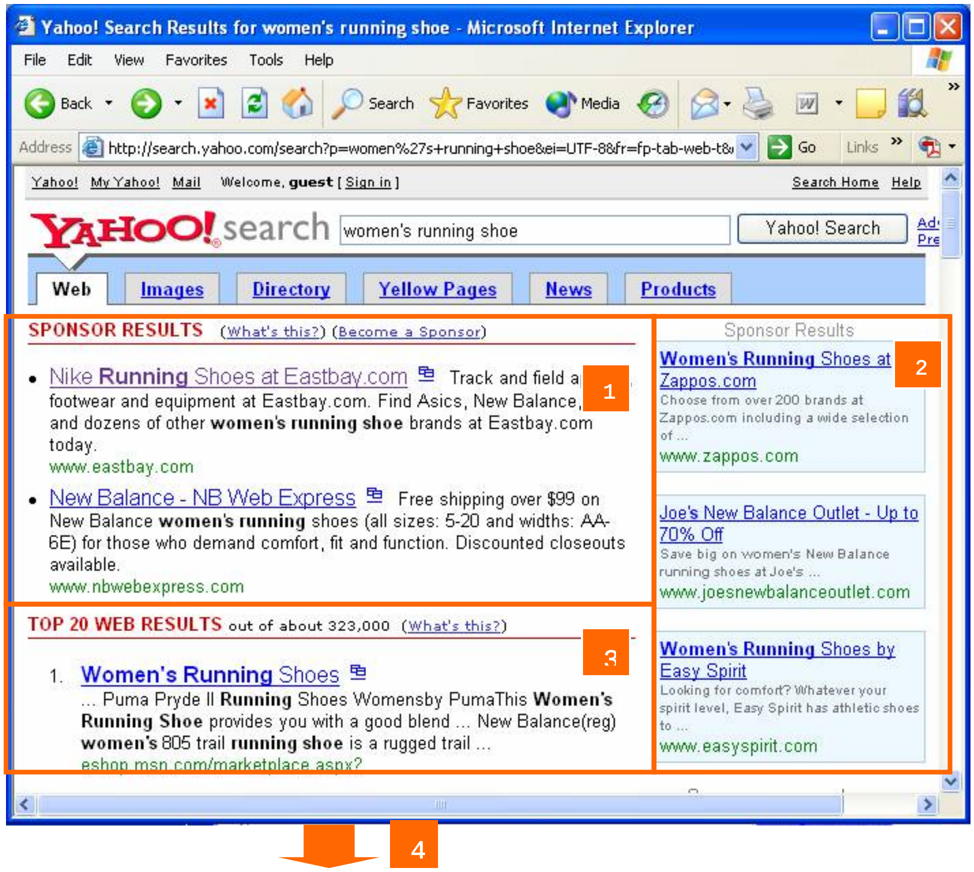
For Google



The Google search results page is divided up into 5 distinct sections. These are:

1. **Top Sponsored Links**
   The top ranking AdWords that appear in the two positions above the search results. These do not appear for every search
2. **Side Sponsored Links**
   The AdWords sponsored listings that appear on the right side of the search results
3. **Optional Information Feeds (i.e. News and Froogle)**
   These appear directly above the organic search results
4. **Above the Fold Organic**
   The organic search results that appear in a typical browser window without the user having to scroll down. The number of listings will vary based on monitor resolution. At 800 X 600 this is typically 2 to 3 listings. At 1024 by 768 it's 3 or 4 listings
5. **Below the Fold Organic**
   The organic search results that require the user to scroll down to see them.

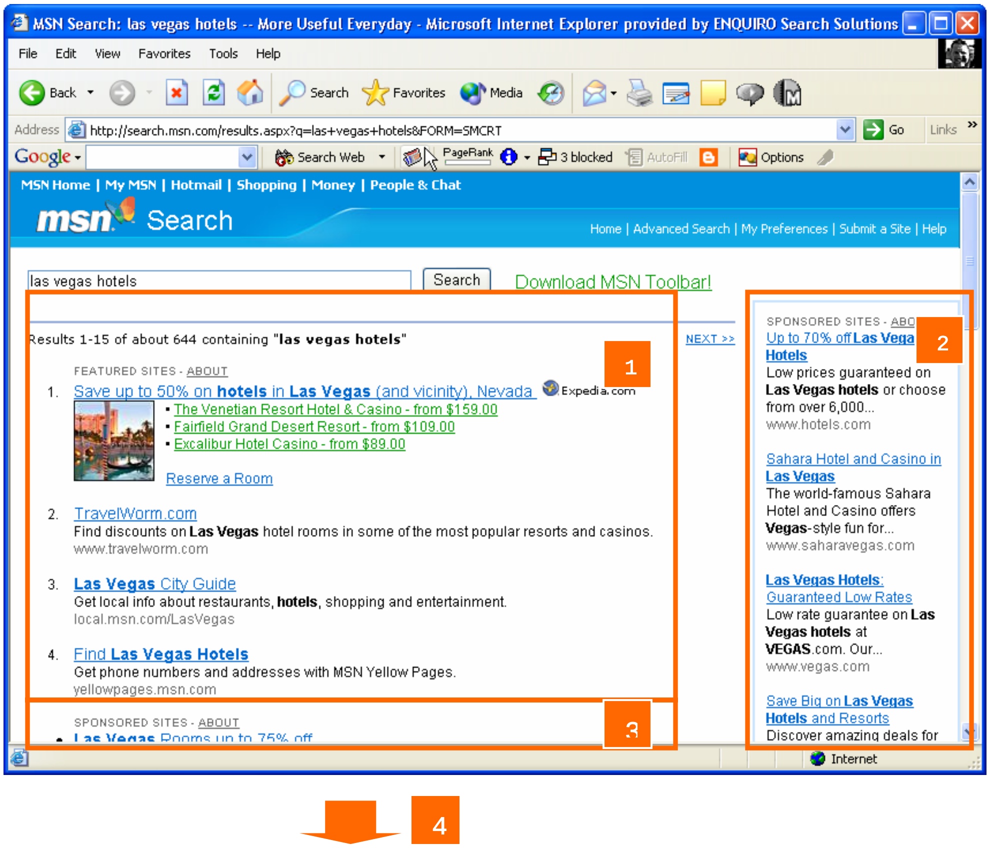
For Yahoo



With Yahoo, there are 4 distinct sections:

1. **Top Sponsored Links**
   In Yahoo, the appearance of the top sponsored results, minus the colored background found in Google, may lead to slightly higher click through ratios for these listings.
2. **Side Sponsored Links**
3. **Above the Fold Organic**
4. **Below the Fold Organic**

For MSN



For MSN, there are also 4 distinct sections:

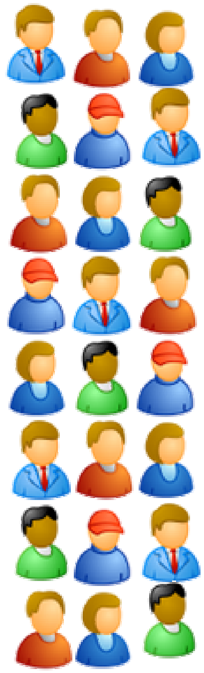
1. **Featured Sites**
   Sites from MSN's Network and Partner Sites
2. **Side Sponsored Links**
   Ads from Overture
3. **Inline Sponsored Ads**
   Additional Ads from Overture
4. **Organic & Web Directory**

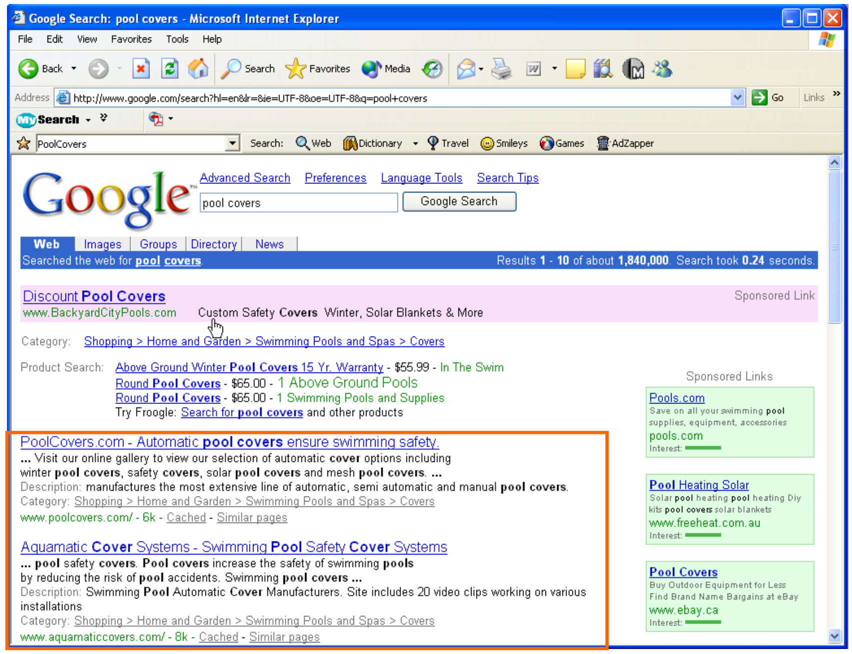
There was a significant amount of confusion regarding MSN Results. Generally, most users didn't make distinctions between Featured Sites, Inline Sponsored Sites and Organic and Directory sites. With MSN showing featured sites and inline sponsored sites, for most searches no true organic results show above the fold, so this becomes a non issue on this search engine. One MSN user, when asked if he recognized the difference between them, stated that he hadn't really thought about it, but thought that they had probably all paid to be there.

Drop off of numbers by section

In observing how users interacted with the search results pages, we noticed distinct trends with the group. Almost 80% (19 of 24) initially skipped over all sponsored listings and went straight to the top organic results. In most cases, their eyes never came back to the sponsored listings. We have shown the results using Google as that was the choice of most of the participants.

Above the fold organic

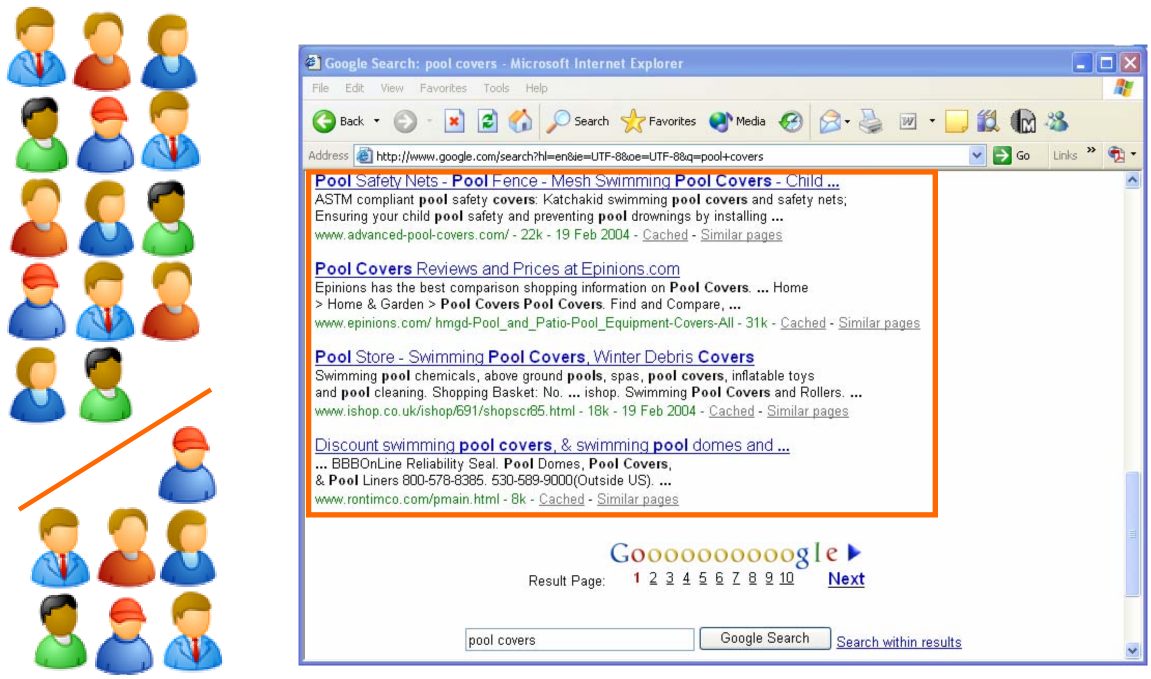




The Above the Fold Organic Results were the "prime real estate" on the search engine results page. All 24 participants checked these 2 or 3 top organic rankings. One participant (a Scan and Clicker) indicated that he usually went straight to sponsored links for a commercial search, but still looked at the top organic results. If there was a highly relevant and trusted site in these top 3, it would likely draw clicks from almost 100% of the participants and, if the site met their needs, they might never return to the search engine results page.

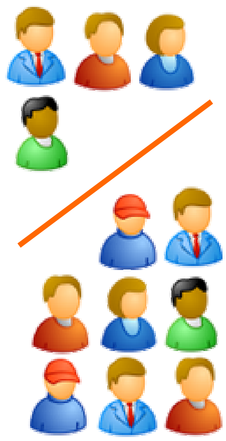
19 of the participants (79%) either didn't look at the sponsored links at all, or only looked at them after they had gone through the organic results. We found that Google users were the ones most likely to skip over the sponsored results. We identified four potential reasons for this, which are covered in Why They Ignore Sponsored Links.

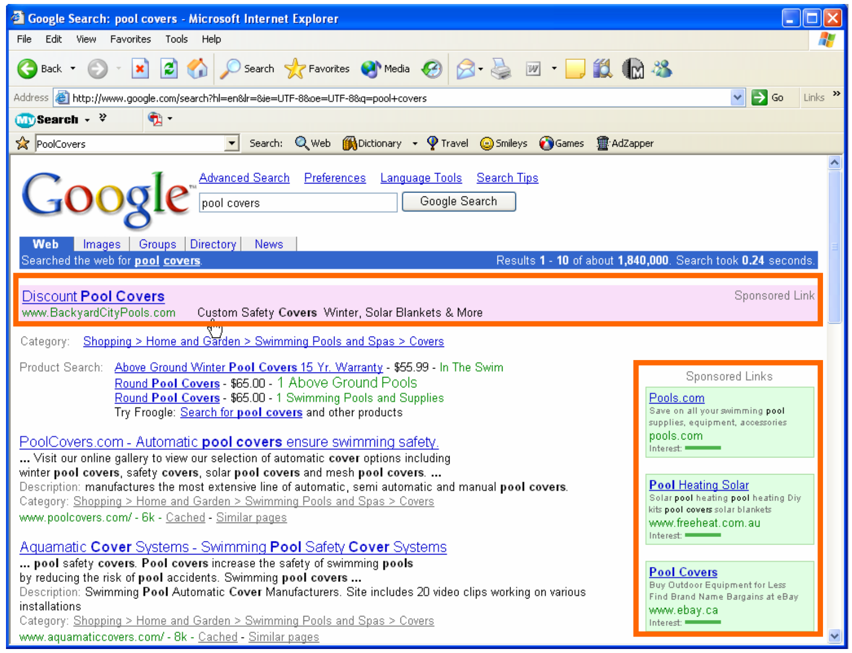
Below the fold organic



The numbers of searchers who would then scroll down to look at the rest of results varied greatly with the quality of the results above the fold. If there was not a clearly relevant and useful site in the top 3, 21 (87.5%) of the participants would scroll down to look at the bottom organic results. However, if there was a highly relevant, quality site in the top 3 listings, only 14 participants (58.3%) would scroll down to check all results before choosing a link to click on.

Sponsored





Interaction with Sponsored listings varied with the type of searcher. Fast Scan and Clickers and 2 Step Scanners sometimes (in about 40% of the cases) included a scan of these results with their scan of the top organic results. Deliberate Researchers and 1,2,3 searchers tended to either ignore the sponsored results entirely, or only go to them if there were no relevant results in the organic listings.

We did find that top sponsored positions were more likely to be seen in both Google and Yahoo. We estimate, based on responses from participants, that these positions might give up to a 40% advantage in click throughs over sponsored links on the right side of the screen.

In the group, we found that 12 searchers (50%) would look at the sponsored listings if they didn't find any relevant sites in the organic listings. However, if one or more relevant sites were found in the organic listings and offered the searcher what they were looking for, the number that would still look at the sponsored links dropped dramatically. Only 4 (16.6%) would look at sponsored links, regardless of what they found in the organic listings. Finally, as mentioned before, one participant actually went to the sponsored links first when doing commercial searches, and 1 other indicated that they occasionally do this as well

2nd page and beyond

If no relevant results were found on the first page, only 5 participants (20.8%) went to the second page rather than launching a new search. If relevant sites were found on the first page of results, only one participant took the time to also check listings on the second (and third) page of results.

Other observations (Froogle feeds)

On Google, we found none of the participants bothered to look at the news and shopping feeds that appear at the top of the organic results. When asked, most said they really didn't know what these were.

Why they ignore sponsored Listings

We found the tendency to skip over sponsored listings interesting and explored this further with participants. This behavior was most pronounced with Google users, although we also saw it with both Yahoo and MSN users.

Drawn to Google

We found that Google has created an inherent contradiction between their mission and their business model that results in a interesting dynamic with their users.

Google, in their drive to continually enhance the search experience, have always maintained a sharp distinction between paid and organic search results. To their credit, this is one of the contributing factors to their success and large market share. Sponsored ads are very easy to identify on Google. For this reason, users who prefer to ignore sponsored ads tend to be drawn to Google, because of this ease of identification. Generally, we found users of Google more likely to be resistant to looking at sponsored ads than on other engines. There was a general perception that Google's organic results were the least commercially tainted ones of all the major engines.

While the percentage of users looking at sponsored listings seems to be less on Google, advertisers can't ignore the fact that this clear delineation of search results attracts more users, so in fact by using Google AdWords you capture a smaller percentage of a much larger market.

AdSense formatting

Another clue to the tendency to ignore paid listings on Google can be found by looking to the Contextual AdSense program. In the early part of the program, the formatting of the AdSense ads was similar to AdWords listings. However, AdSense ads appeared on information sites as "non requested" content, so most users were likely to treat them as common advertising. "Pale green box, text content..must be an ad. I'll ignore it," was the conditioned response that Google was creating in its AdSense program. This conditioning was carried back to the Google results page, where the similarly formatted AdWords were also ignored by searchers. In effect, Google was training its users how to ignore its own advertising.

This, together with the point below, could explain the greater likelihood on the part of users to scan the premium sponsored listings in the 2 top of page positions.

Position of ads

Another point expressed by 3 or 4 of the participants was that the position of ads, on the right hand side of the page, caused them to ignore the ads. "Anything in that area is always advertising", said one participant. "I always ignore them." In a quick survey of 6 popular portal sites, we did indeed find that advertising is generally concentrated in exactly the same page position as where Google AdWords appear. While we suspect that Google placed the advertising here for this very purpose, it still leads most users to skip over the ads.

Example of Advertising Placement on a Portal Page

Quality of sites using Sponsored Links

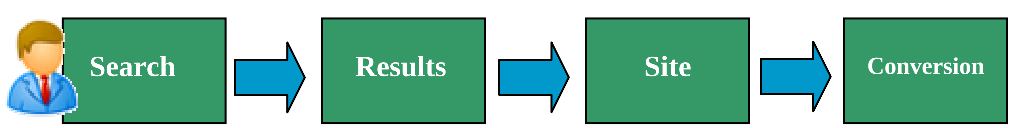
The final point mentioned by 3 participants is that they were leery of clicking on sponsored links, because they were afraid of launching a never ending string of pop up windows and other annoying intrusions. A comment was, “Those sites aren’t really the quality I’m looking for. I just don’t want to be bombarded by banners and pop ups.” While we believe this perception was born in the early days of the AdWords program, when aggressive marketers dominated the listings, it still exists and causes many searchers to skip over sponsored links.

The search process

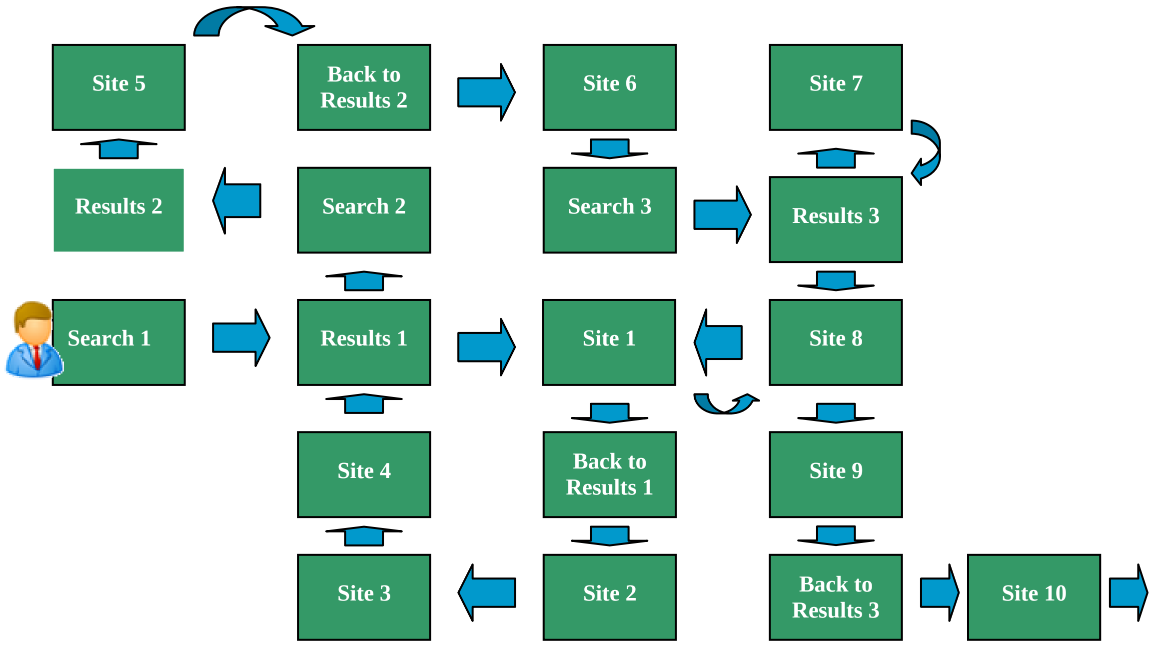
In looking at actual search patterns, we noticed that a typical search interaction can be a long and convoluted process that can lead suddenly in unexpected directions. There are several factors at play here, any of which can take the searcher in an new direction, either closer or further away from your site.

Circular, not Linear

As marketers, we tend to think of the search process as a linear one.



In reality, we see the typical search pattern is quite different



A typical search is a circular and complex process, with multiple interactions with sites and search engine results pages. A typical online research interaction can involve 5 to 6 different queries and interactions with 15 to 20 different sites. Often, the actual contents of a search results page can cause the searcher to take the search in a totally different direction, launching a new query that is at best somewhat divergent from the original purpose of the search. Dead ends are common and the browser back button is used extensively to navigate through the search process. For this reason, the search engine results page is actually used as a navigation aid in negotiating the online research interaction, as people continually refer back to it and launch another online exploration from this starting point.

While difficult to strategize for, search marketers have to understand that a search interaction is a complex process and that the searchers mindset evolves as they move through it.

Using non search reference sites

In search interactions where the searcher has some familiarity with the product or a potential vendor, we found that over 80% of the searchers would use a well known non search site to help narrow down their choices. For travel related searches, these would typically be a travel portal such as Expedia.com or Travelocity.com. For home electronics, it could be a well known retailer, such as Circuit City. We also found E-bay and Amazon used for this purpose as well.

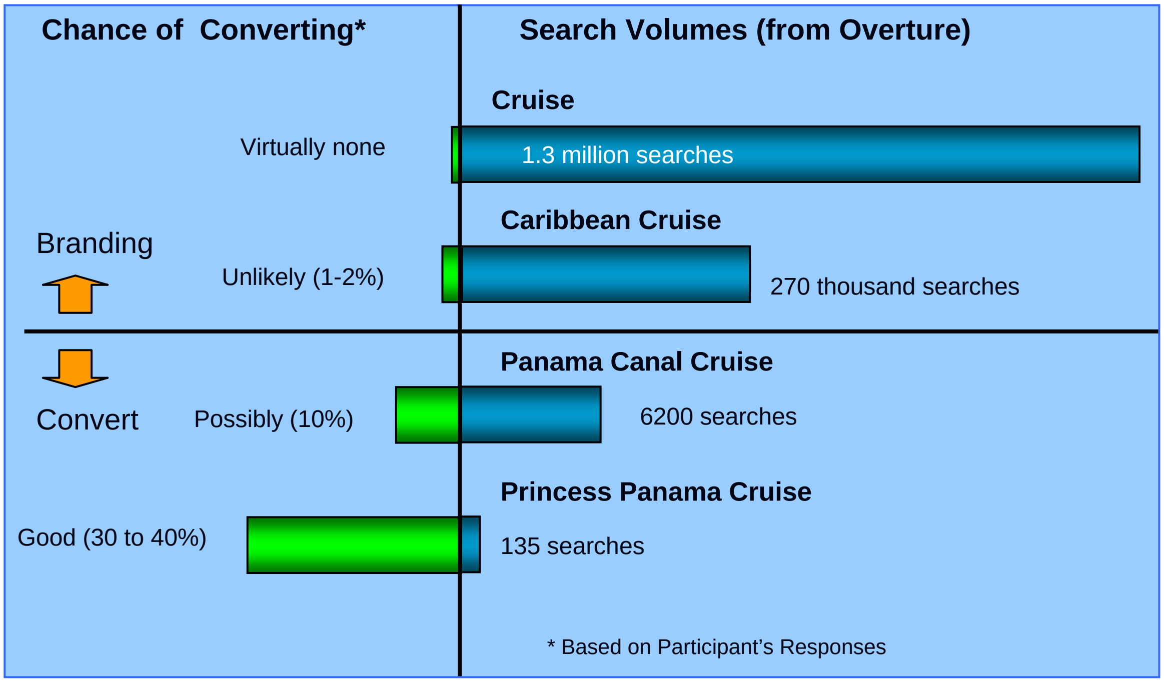
Refining of Search

Over 70% of participants indicated they like to start with a generic, inclusive keyphrase and narrow it down from there. Reasons for this included:

- Not wanting to exclude potential quality sites by being too exclusive in the original search
- By being broader, the searcher may find other options to help take the search in new directions by looking at the results

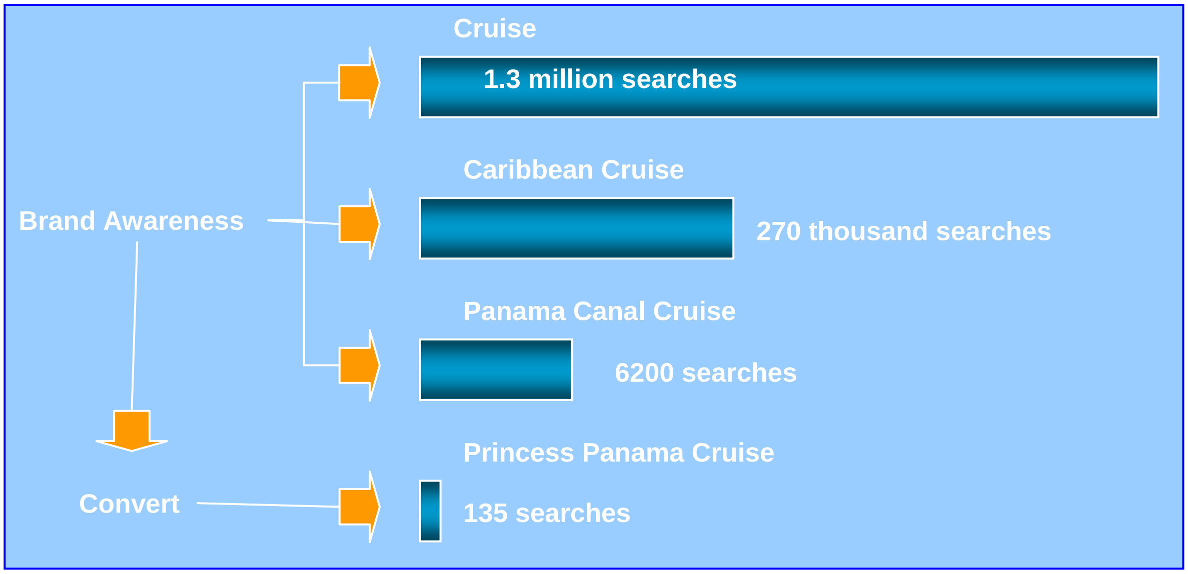
- Being able to judge relevancy of the original findings and selectively increase relevancy by adding qualifying keyphrases
- It's easier and quicker to type in a broad, short phrase at the beginning

In this type of search pattern, looking at search volumes and typical conversion metrics can be misleading to many marketers.



A typical search pattern (from an actual search scenario) is shown above. As can be seen, the search becomes increasingly specific as the search goes through the search process. As this happens, the chances of the searcher finding results that could lead to a conversion becomes greater and greater as the search progresses. However, the direction the search takes can be determined by the results found in the early, generic searches. For instance, in this case, the searcher didn't start out looking for either a Panama Canal Cruise or a Princess Cruise, but results found early in the search process led her to refine her search query in these directions. If awareness of these options hadn't been introduced early in the search process, she would have never refined her search in these directions, leading to a likely conversion for Princess for a Panama Canal Cruise.

Introduction of Brand



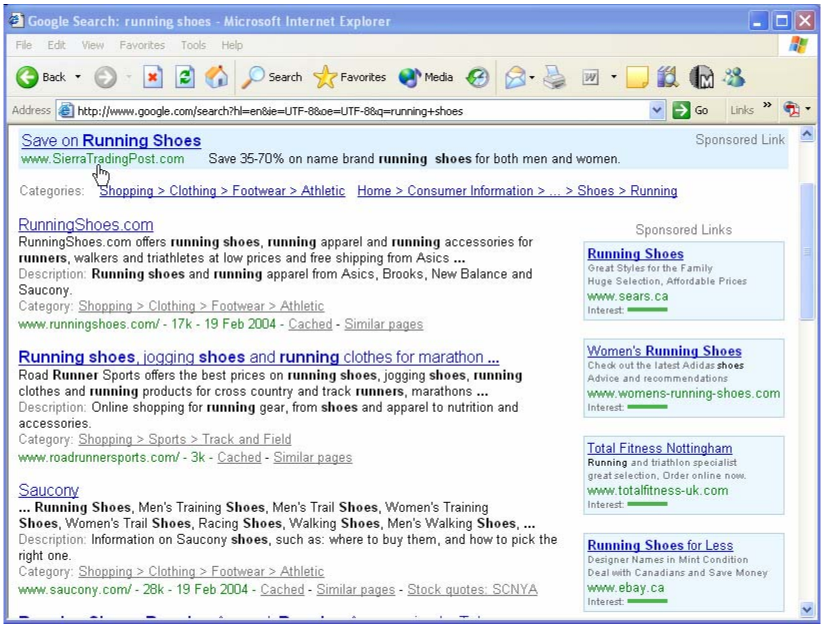
This iterative search process introduces the opportunity for a multiple touchpoint approach to search marketing, introducing brand early in the search process and then reintroducing brand throughout the process. Obviously, this process works better if the brand is familiar with the consumer, with the advertiser having built brand equity through other online and offline search channels. But this is not always the case, as is shown by this actual search scenario that happened during the focus group.

Running Shoes Search Scenario

In this case, the searcher was a 52 year old woman, well educated and reasonably affluent. She matched the Deliberate Researcher search profile. The subject was an avid runner and wanted to find a new pair of high quality running shoes. She started the search process with top of mind awareness of the brands Nike and New Balance. But, as with many searchers, she didn't want to narrow her options at this point by only searching for those brands at this stage. So, she went to Google and searched for ***running shoes***.

Initial Search Results

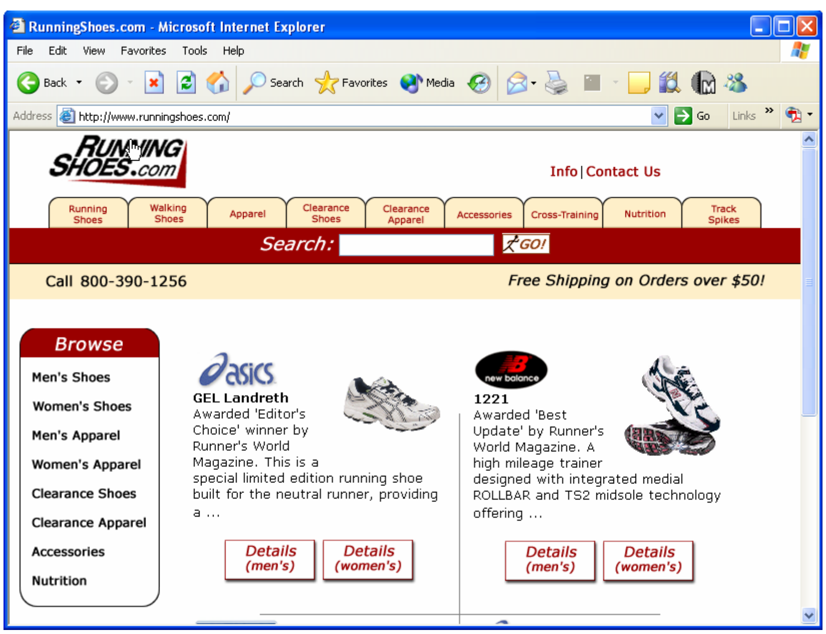
She got the following results. As with most Deliberate Researchers, she skipped the sponsored listings and went right to the organic ones.



She liked the first listing, which appeared to offer the ability to compare a number of different running shoes in one place. She recognized the brands New Balance, Brooks and Asics, but had never heard of Saucony. At first, she didn't think much about this, but the third listing was actually the manufacturer's site for Saucony. Being a runner that tends to like running on trails with uneven surfaces, the words "Women's Trail Shoes" caught her attention briefly. The brand Saucony had been introduced to her.

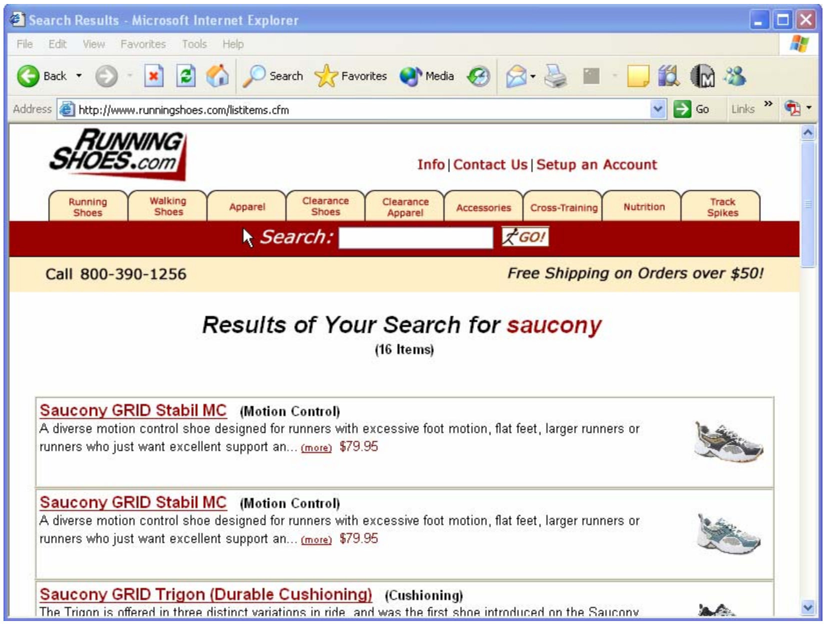
Clicking Through to First Site

After scanning the rest of the organic results, she ended up clicking on the first listing for Runningshoes.com.



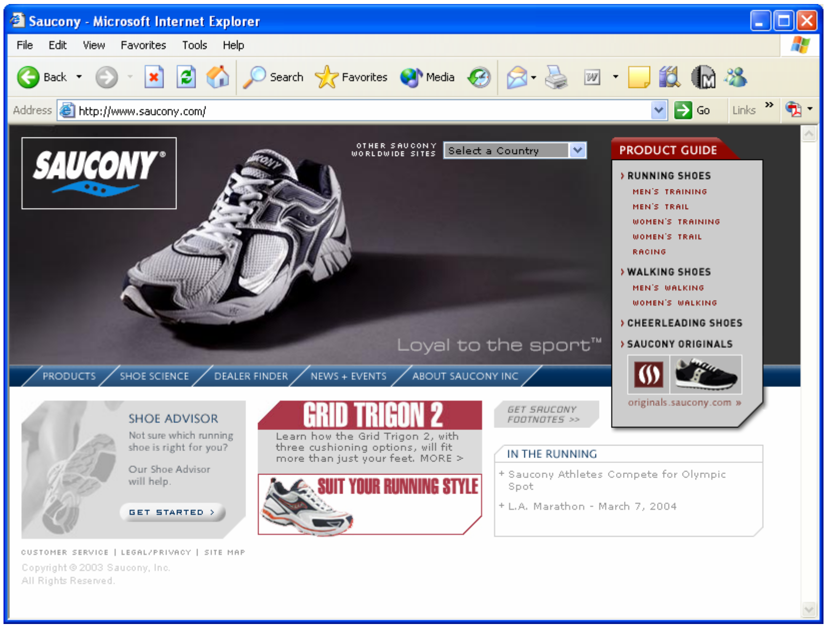
On visiting the site, she saw choices for both Asics and New Balance. However, she couldn't remember the name of the other brand. She hit the back button to the search results page, then returned to Runningshoes.com and used the internal search tool to search for Saucony.

Brand Investigation



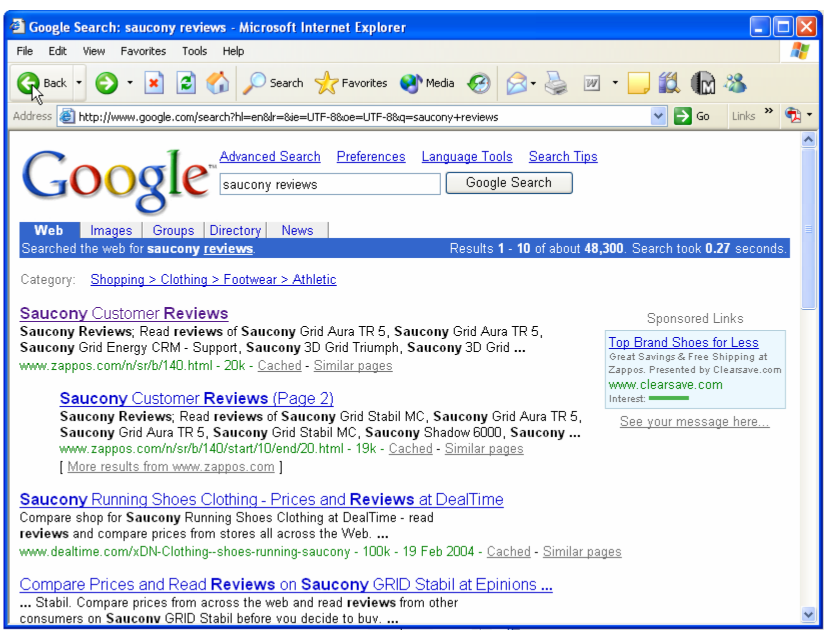
After reading the results of the internal search, her attention was caught by the fact that Saucony offers shoes that control excessive foot movement. Because of the irregular surfaces she runs on, this has been a problem with previous shoes. At this point, she wanted to find out more about these shoes. She clicked the back button until she returned to the search results page and clicked through on the Saucony manufacturer's site

Visiting the Manufacturer's Site



She spent a fair amount of time on the Saucony site, reviewing product information on the trail running shoes they offer. She was impressed with what she saw, but wanted to find some objective product information about the shoes. She returned to Google and launched a new search for "Saucony reviews"

Brand Research



Although she scanned all the results, the first organic listing really seemed to offer what she was looking for, so she ended up clicking on this link.

At Zappos.com she read the reviews and again was impressed. At this point, she felt her online research was complete and her next step would be to visit her local store and ask to see specific brands. She will be sure to ask them about Saucony.

This scenario presents an example of how search directions can changed based on interactions with search results. In this case, the searcher went from being totally unaware of a brand to asking for it by name when she visits the local retailer. But this would have never happened if the brand Saucony hadn't been introduced very early in the search process.

Also, it's interesting to note that by all performance metrics typically used by search marketers, this would have been unsuccessful. The shopper never converted by offering her contact information or making a purchase. The entire research process was done anonymously (see the Anonymity Threshold, below). Yet, in all likelihood, it will lead to a sale for Saucony and should be considered as a very successful online search interaction. This points out some of the short comings of current conversion based search ROI analytics.

What Captured the Click?

In general, searchers were looking for the following during a consumer research search interaction. (These are listed in order of importance)

- The exact query in the Title and Description
- Product information: features, comparisons, reviews, prices
- Trusted sources of information, i.e. Consumer Reports
- Trusted brand names and vendors
- Trusted URL's

If searchers were looking for a site to make a purchase from, the importance of what appeared in the title and listing text changed a little. (Again, these are listed in order of importance)

- The exact query in the Title and Description
- Offer product information: features, comparisons, reviews, prices

- Trusted brand names and vendors
- Promises of added value: discounts, free shipping, etc
- Ability to buy online
- Trusted URL's

In both cases, relevancy was a key factor in catching the searchers eye with the listing text. Seeing their exact search query in the title (preferably) or in bold type in the listing text caused the listing to "jump out" at the searcher. Once their attention was caught, they would look for other important information to help determine if this site would help them in making their purchase decision.

While price was important, the attitude towards price information changed as the searcher got closer to the buying decision. Earlier in the research phase, price was important to ensure that the product was "within budget". As the actual purchase drew closer, searchers then were searching to find the best price.

Category Killers

We found certain listings drew a disproportionate number of clicks if they appeared within search results pages. For instance, if a Consumer Reports page or a product review from a well know industry publication or site appeared during the research phase in the top 3 or 4 organic listings, they were almost guaranteed a 50% plus click through rate. The same was true to a lesser extent for listings from very familiar vendors. These names caught the searchers attention and built instant trust, giving a much greater likelihood of click through.

For marketers, it's important to see if these category killers appear for the prime key phrases in the search engine results page, and, if so, to devise strategies to work around them. By clearly understanding what the searcher is looking for, it is often possible to minimize the effects of a click through Category Killer.

Types of Searchers and Demographics

Four distinct types of searchers were identified in the study. We found that two of the types tended to be male dominated (and were exclusively male in our group) and two tended to be female dominated. Below, we have outlined the major demographic characteristics of each group and also shown how they search.

Scan and Clickers

Search Patterns

- Does a quick scan of top 3 or 4 listings.
- Most will go with organic, but some will scan sponsored listings, especially if they're looking to buy something
- Tends to click top listings without really reading the title or description thoroughly.
- Assumes top listing means its relevant
- Once on site, makes decision whether site is relevant or not quite quickly (10 – 15 seconds)
- Will only go into lower listings if they don't find anything in top 4. Even then, there's a greater likelihood they'll refine their search first. Never goes to second page.

Characteristics (in Focus Group)

- 3 out of 24 (12.5%)
- All male
- Aged 23-28
- Average age: 25.6 years
- Education: High School – College
- Average Income $32,500
- Tend to be frequent users of search engines
- Have no problems buying online
- Average time before clicking: 8.5 seconds

2 Step Scanners

Search Patterns

- Scans top 3 or 4 listings to see if anything “jumps out” and if it does, will go with this site. If not, they’ll do a more deliberate scan up and down the page
- Even when clicking through to a site, resists converting until other sites are investigated
- On 2nd scan, tends to read titles and descriptions more thoroughly
- Tends not to look at sponsored listings until after organic listings are at least scanned quickly
- Very rarely goes to second page of results

Characteristics (in Focus Group)

- 6 out of 24 (25%)
- All male
- Aged 20-62
- Average Age: 42
- Average income $47,900
- Education: College - University
- Fairly experienced with search engines
- Mixed feelings about buying online
- Average time before clicking: 13.6 seconds

Deliberate Researchers

Search Patterns

- Will read through all listings on the first page before making a selection
- Reads titles and descriptions carefully. May also check URL’s to make sure they’re reliable sites
- Tend to avoid sponsored links
- Tend to do more research online about purchases
- Once they click through to a site, tend not to hit the back button as quickly as other types of searchers
- This group is most likely to go to second page of results, but even then, only 40% of them say they go past the first page

Characteristics (in Focus Group)

- 10 out of 24 (41.6%)
- 40% male, 60% female
- Aged 22 – 53
- Average Age: 35.6 years
- Average Income: $36,750
- Education: College - University
- Varying degrees of experience with search engines
- Less likely to buy online
- Average time before clicking: 39.7 seconds

1,2,3 Searchers

Search Patterns

- Goes through the search results in order
- Reads Titles and Descriptions, but will click through to a site if it looks interesting without looking at sites below it
- Tend to skip over sponsored listings and starts with first organic listing.
- The one exception went directly to the sponsored listings first because she was “ready to buy” and found them more relevant
- Uses back button to return to the results page if not satisfied and picks up where they left off
- One out of the five went through to the second page

Characteristics (in Focus Group)

- 5 out of 24 (20.8%)
- 20% male, 80% female
- Aged 22 – 41
- Average age 29.5 years
- Average income $30,000
- Education – College level
- Less experience with search engines
- Less likely to buy online
- Average time before clicking: 19.9 seconds

Post Click Behavior

In watching what happens after a user clicked through to a site, it became clear that the searcher is clear about what they want to see on a site and that the decision is made quite quickly. Again, men tended to make these decisions faster (about 10 seconds) while women were a little more deliberate (18 seconds). And, as with the search itself, there were distinct variances in the factors researchers were looking for, as compared to purchasers.

What Researchers Looked for on a Landing Page (in order of importance)

- Query Keywords - In a heading or other prominent location
- Product Picture
- Selection - Ability to see different products in one place. Should have trusted brands featured

- Features - Find out more about the product
- Prices – Don’t make them ask for it!
- Comparison - Direct comparison between models
- Clean Professional Layout - Is this a trusted site?
- Reviews - Consumer reviews, client testimonials
- Offers – Value added offers, i.e. free shipping
- Clear Navigation – Is it easy to move around and continue researching
- Clear Conversion Path – Is it easy to buy or ask for more information

What Purchasers looked for on a Landing Page (in order of importance)

- Query Keywords - In a heading or other prominent location
- Product Picture
- Offers – Value added offers, i.e. free shipping
- Prices – Don’t make them ask for it
- Features - Find out more about the product
- Clean Professional Layout - Is this a trusted site
- Clear Conversion Path – Is it easy to buy or ask for more information
- Selection - Ability to see different products in one place. Should have trusted brands featured
- Comparison - Direct comparison between models
- Clear Navigation – Is it easy to move around and continue researching
- Reviews - Consumer reviews, client testimonials

The Anonymity Threshold

In watching the participants interactions with a site, we also found that another common trait appears, particularly with the deliberate researchers. We have called it the Anonymity Threshold.

In general, people feel they are relatively anonymous when they are browsing online. And when people are gathering information about a purchasing decision, most prefer to remain anonymous. They don’t want to be exposed to sales pitches at this point, because they’re not ready to engage in the purchase process. They haven’t narrowed down their list of options yet.

In looking at the cruise example used in the buying funnel, it wasn’t until the searcher had found the right destination, type of cruise and cruise line that they were ready to engage in the purchase process. For this reason, they were resistant to purchase process oriented incentives (i.e. discounts) until the very last.

The internet has become very popular as a research tool during the information gathering process because it appears to offer the ability to remain anonymous. Through search engines, you can gather a lot of information quickly and you don’t have to enter into a situation where you surrender your anonymity until you choose to. We believe this is the reason there is a significant drop off between people willing to use the Internet to research a purchase decision and people willing to use it to purchase online. This drop off has been identified by a number of ecommerce studies. The purchase requires people to cross the anonymity threshold and they’re not prepared to do that. They know once they surrender contact information, they will likely be contacted by the vendor and be engaged in a purchase transaction. The consumer wants to do this according to their timing, not the vendors.

An interesting example of a violation of the anonymity threshold was presented by the use of online real time, real person sales chat tools such as HumanClick and Groopz. At first glance, these tools seemed a great answer to the impersonal nature of the Internet. You could watch visitors navigate through your site and if they wished, they could click on a button and initiate a real time chat with a sales person. As long as vendors stayed on this side of the fence, and let the visitor initiate the session, there was no problem. The challenge came when the vendor “pushed” a chat window to visitors, offering assistance. Almost without exception, the visitors left immediately. We, along with a few other vendors we talked to, found that the minute we walked over the threshold and made visitors aware that they were being watched, they quickly left our site.

People won’t cross the threshold until they have no option. If given the choice between getting information and remaining anonymous and getting the information through registering, people will always choose the former. This creates a bit of a dilemma for the marketer, because generally the key metric is measuring against acquired or converted visitors. Almost every definition of an acquisition or conversion requires the visitor to cross the anonymity threshold. Because of the reluctance of the visitor to cross this threshold, the site owner may be building significant brand equity or trust with the visitor but is not giving credit to it because of the anonymity threshold.

In order to entice people to purchase online, the web vendor has to offer at least one significant advantage, whether it’s price, selection or convenience. If all things are equal or even close to equal, people will tend to avoid entering into a purchase process online.

In looking at most search marketing strategies; the emphasis is put on encouraging the purchase, while most people using search engines are more interested in anonymously gathering information. We believe this to be a fundamental disconnect.

Conclusions

While the sample size impairs this study’s statistical accuracy, we feel that it has allowed us to identify some key factors in understanding consumer search behaviors. The ability to review actual search interactions and interview the participants allowed us to investigate many factors to a degree that would have been impossible with other research methodologies. And it is only through a better understanding of consumer behavior while using search engines that we can use this channel more effectively.

To our knowledge, the identification of distinct search patterns and the degree of complexity that is involved in the common search pattern has not been identified, and, if so, it has not been published previously.

We found that much of the behavior found in search consumers is similar to behaviors found in typical off line purchasing interactions. Perhaps because of the simplicity of the search engine’s functionality, we underestimated the complexity of our interactions with it. While a search engine is relatively simple, humans are not and so when we use this incredible research tool, we overlay all of our motivating factors, needs, rationalizations and pre existing brand knowledge onto it.

We feel the findings of this research project points out the need for a much better understanding of our target consumers and their own motivations and psychological “map” when using search engines. While this may introduce a new level of complexity to search marketing, at Enquiro we believe this is necessary as the channel matures and the marketer’s sophistication relative to it increases.