



WE LOVE DATA™

Industry insights for
online advertising
activity on search

By:  **THE SEARCHMONITOR**

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Introduction

We LOVE Data™ is a research series published by The Search Monitor to provide industry insights for online advertising activity on search engines and other online marketing channels.

This document includes a selection of research pieces from 2016-2019.

Visit www.thesearchmonitor.com for more industry insights, competitive intelligence and brand protection tips.

Amazon vs. Walmart vs. Target

We picked the apparel space for this analysis because it presented the opportunity to study a vast variety of keywords and brands. This space faces a lot of competition from resellers and brand manufacturers - which makes it tough to dominate. We track all of this with sophisticated crawlers and deep ad copy reporting tools!

We were curious to see how Amazon, Walmart, and Target stack up as far as reach and affiliate strategies.

Our findings amazed us. We revealed not just a fight BUT a genuine beat down! Amazon destroyed this space with an impressive reach that is 12x greater than Target and 6x the size of Walmart. The most mind-blowing part is how Amazon used an unconventional strategy to dominate: Affiliate direct linking!

Here is what we found:



We Love This Data... Why?

- ▶ **Amazon's Dominant, Unique Strategy.** Amazon crushed Walmart and Target in reach. The most mind-blowing part is that Amazon used an unconventional strategy to dominate by empowering its affiliates to direct link. Direct linking affiliates comprise 99% of Amazon's reach! Look at these ads – all are affiliates!

Ad Copy

Reebok Training Shoes For Me...
www.amazon.com/apparel/m...
Find Deals on Reebok Training Shoes For Men in Mens Shoes...

SEARCH TERM
reebok training shoes

- **Advertiser:** amazon.com
- **Search Engine:** Google
- **Rank (Avg):** 3
- **Search Terms:**
reebok training shoes
- **Affiliates:**
Amazon: googhydr

Brand+

Classic Addidas at Amazon@ |...
www.amazon.com/fashion
Shop Hundreds of Favorite Brands. Free Shipping on Quali...

SEARCH TERM
adidas classic

- **Advertiser:** amazon.com
- **Search Engine:** Bing
- **Rank (Avg):** 2
- **Search Terms:**
adidas classic
- **Affiliates:**
Amazon: mh

- ▶ **We Learned That Amazon Spends 1% of What we think.** Amazon's direct linking affiliate strategy causes their ads to literally show up on every product keyword. This makes you think that they are spending \$20 - \$30 million dollars/month on paid search. What we found is that Amazon actually only spends ad dollars on its own brand name, while their domineering ads on brands that they sell are cleverly paid for by Amazon's direct linking affiliates.

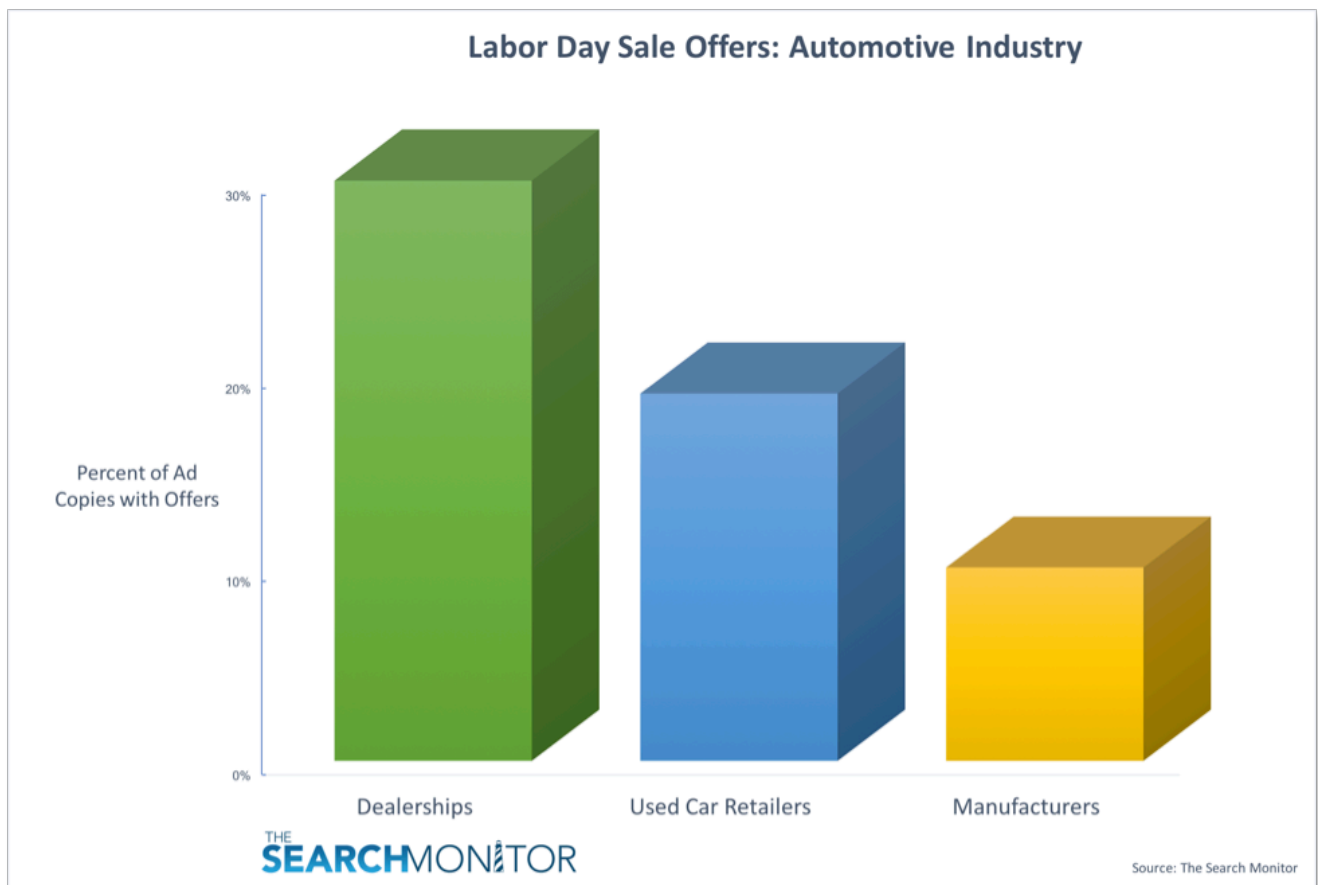
- ▶ **Walmart's Coordinated Strategies Worked Great Too!** Walmart's strategy is a nice mix of running a strong search presence with its own ads coupled with incentivizing affiliates to promote Walmart on their landing pages. Walmart's coordinated strategy nearly split their reach 50/50 between their own ads and affiliates. Despite trailing Amazon, half of Walmart's reach coming from affiliates, accounted for them having twice the reach of Target.
- ▶ **Prevalence of Affiliates.** We were amazed by such a high prevalence and importance of affiliate usage. Amazon and Walmart generated the majority of their reach from affiliates while Target was trailing in reach due to its lack of affiliate use. We wonder... Why doesn't Target utilize affiliates in its search channel strategy?



Auto Dealers vs. Brands

The auto industry is interesting to us because it is complex. The sales process starts with brands at a national level, but the actual buying occurs at the local level with either a Dealership or a Used Car Retailer holding the relationship. This three-legged stool faces tough competition and geo-specific sales boundaries. We track all of this with our geo-targeted system - down to the zip code!

We were curious to see how the savvy auto industry works together. Here is what we found:

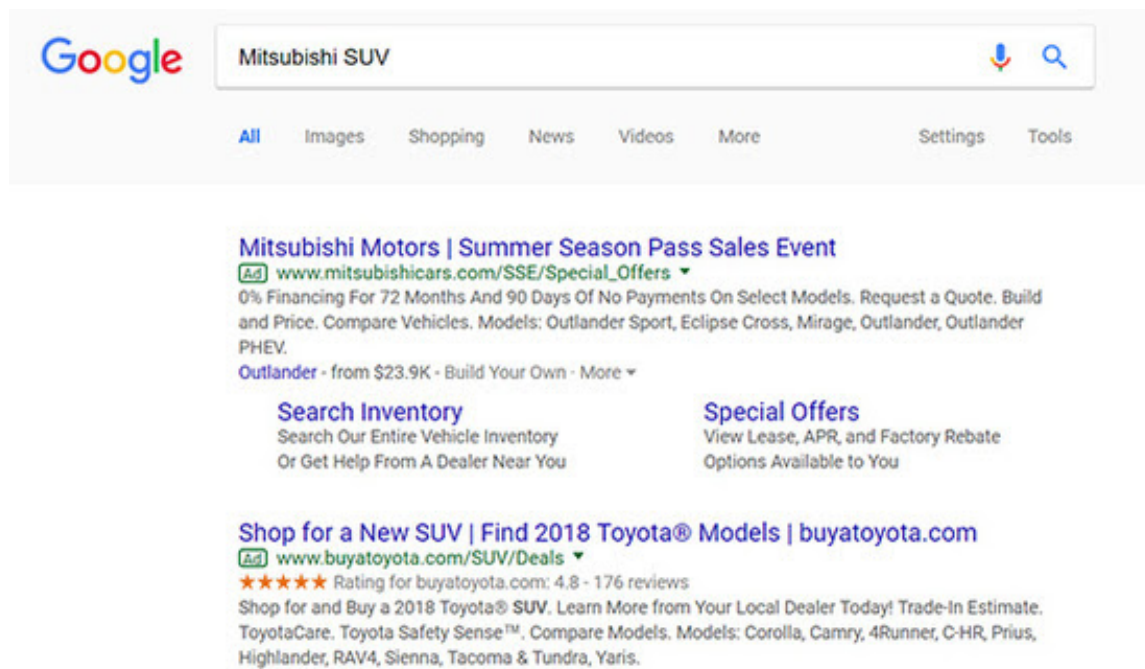




We Love This Data... Why?

- ▶ **It's Coordinated!** Dealers and manufacturers work great together. Dealers push the offers 3 to 1 over the Manufacturers, while the Manufacturers offer support by touting features and benefits. It will be interesting to see who is actually spending more - Dealers or Manufacturers? We bet the dealers do as a group... we will explore this next time.
- ▶ **Used Car Retailers are Losing.** Used car retailers are lagging behind the dealers. The ad copy does not push offers nearly enough - Dealers push offers 168% more than the Used Car Retailers. Maybe they have less margin or don't realize that they need to compete with offers. 0% APR is a good offer, quick show of hands -- most of us will buy new over-used any day at that price (even with the depreciation). What do you think this means?
- ▶ **Brand vs. Brand - Competitive Bidding.** The biggest surprise comes from brand vs. brand competitive bidding. 8.5% of copies are car manufacturers brand bidding on each other. This is great, and we push this practice of competitive brand bidding here, but it has to be done right to work.



Look at these mistakes:



Google  

[All](#) [Images](#) [Shopping](#) [News](#) [Videos](#) [More](#) [Settings](#) [Tools](#)

Mitsubishi Motors | Summer Season Pass Sales Event
www.mitsubishicars.com/SSE/Special_Offers
0% Financing For 72 Months And 90 Days Of No Payments On Select Models. Request a Quote. Build and Price. Compare Vehicles. Models: Outlander Sport, Eclipse Cross, Mirage, Outlander, Outlander PHEV.
Outlander - from \$23.9K - Build Your Own - More

Search Inventory
Search Our Entire Vehicle Inventory
Or Get Help From A Dealer Near You

Special Offers
View Lease, APR, and Factory Rebate
Options Available to You

Shop for a New SUV | Find 2018 Toyota® Models | buyatoyota.com
www.buyatoyota.com/SUV/Deals
★★★★★ Rating for buyatoyota.com: 4.8 - 176 reviews
Shop for and Buy a 2018 Toyota® SUV. Learn More from Your Local Dealer Today! Trade-in Estimate. ToyotaCare. Toyota Safety Sense™. Compare Models. Models: Corolla, Camry, 4Runner, C-HR, Prius, Highlander, RAV4, Sienna, Tacoma & Tundra, Yaris.

This Toyota dealer makes the mistakes of:

- ▶ Not including a 'compare' in the title or body
- ▶ Not including the branded keyword, "Mitsubishi", in the URL
- ▶ Failing to present any distinguishing features or offers to separate itself from the Mitsubishi SUVs

Google nissan leaf

All News Images Videos Shopping More Settings Tools

About 8,740,000 results (0.81 seconds)

Nissan® LEAF® - Official Site - Experience the 2017 Lineup
www.nissanusa.com/Leaf
Search All The New 2017 Models. Explore, Build, Price, & Locate.
Build Your 2017 LEAF · Search Local Inventory · Download a Brochure Now · Request a LEAF Quote

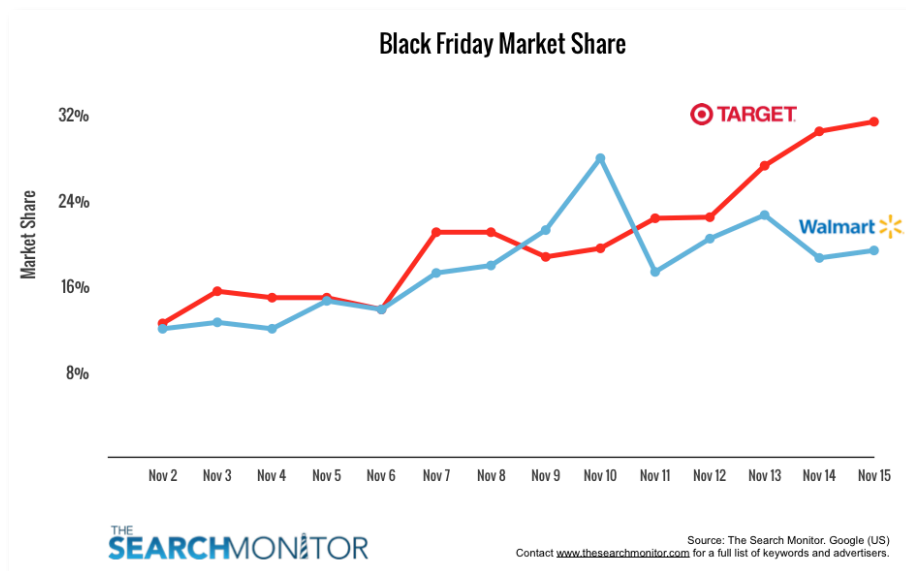
C-MAX Energi Plug-In Hybrid - Compare It to Other Plug-Ins.
www.buyfordnow.com/Nissan/Leaf
If You're Comparing C-MAX Energi to Competitors, See Your Ford Dealer Today.
Fun-To-Drive Hybrid · Available MyKey® Tech · SYNC® Technology · Regenerative Braking
Get a Quote · Locate a Dealer · Safety Features · View Current Offers
315 Clendenny Ave, Jersey City, NJ - (201) 432-7272

We love this copy from Ford, for the keyword 'nissan leaf', because:

- ▶ They offer to 'compare' to the competitors in their title and body
- ▶ Ford notes several features of their C-MAX Energi Plug-In-Hybrid,
- ▶ The use of the branded search term, 'NissanLeaf', in the URL

Black Friday Market Share Battle

We looked at data from 11/2 to 11/15 and uncovered an **amazing head-to-head battle** between retail giants Walmart and Target. **What this metric reveals:** The Search Monitor's SEM Market Share data expresses the likelihood of an advertiser getting a click for a given keyword or keyword set, given their rank and frequency. Here's what we found:



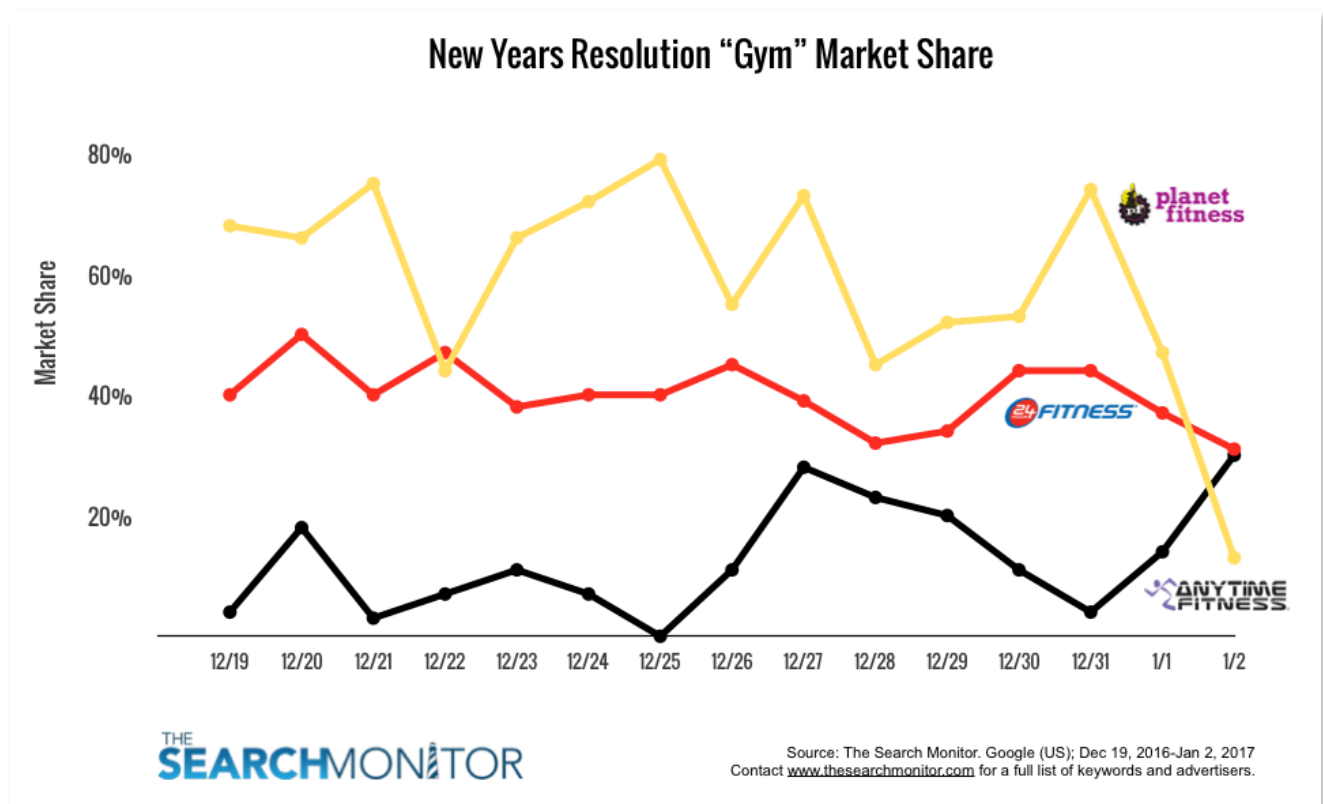
What we love about this data:

- ▶ **Target:** Target has been steadily gaining market share over the last week. It's hard to think that this isn't a well-executed plan of attack starting in November. It will be interesting to see if they hold on to that market share, and what tactics they use to do it. Bids? Budgets? Offers? Frequency?
- ▶ **Walmart:** Walmart's market share stayed on the same track as Target until the 13th, when it dropped to around 20% on these key search terms. Could this be the start of a strategic move to conserve spend until Black Friday itself, when they go big?

How Planet Fitness won the New Year's gym membership search battle

January—time to get to the gym. At least that's what leading gyms and fitness clubs hope you'll be doing. To start the year, we wanted to study the strategies of PPC advertisers around the common New Years resolution of joining a gym. We trended our [PPC market share data](#) and Search Marketing Visibility Scores for the keywords "fitness centers", "fitness clubs", and "gym memberships" to see who came out on top. **Gym Membership Market Share**

What this metric reveals: The Search Monitor's SEM Market Share data expresses the likelihood of an advertiser getting a click for a given keyword or keyword set, given their rank and frequency. Here's what we found:



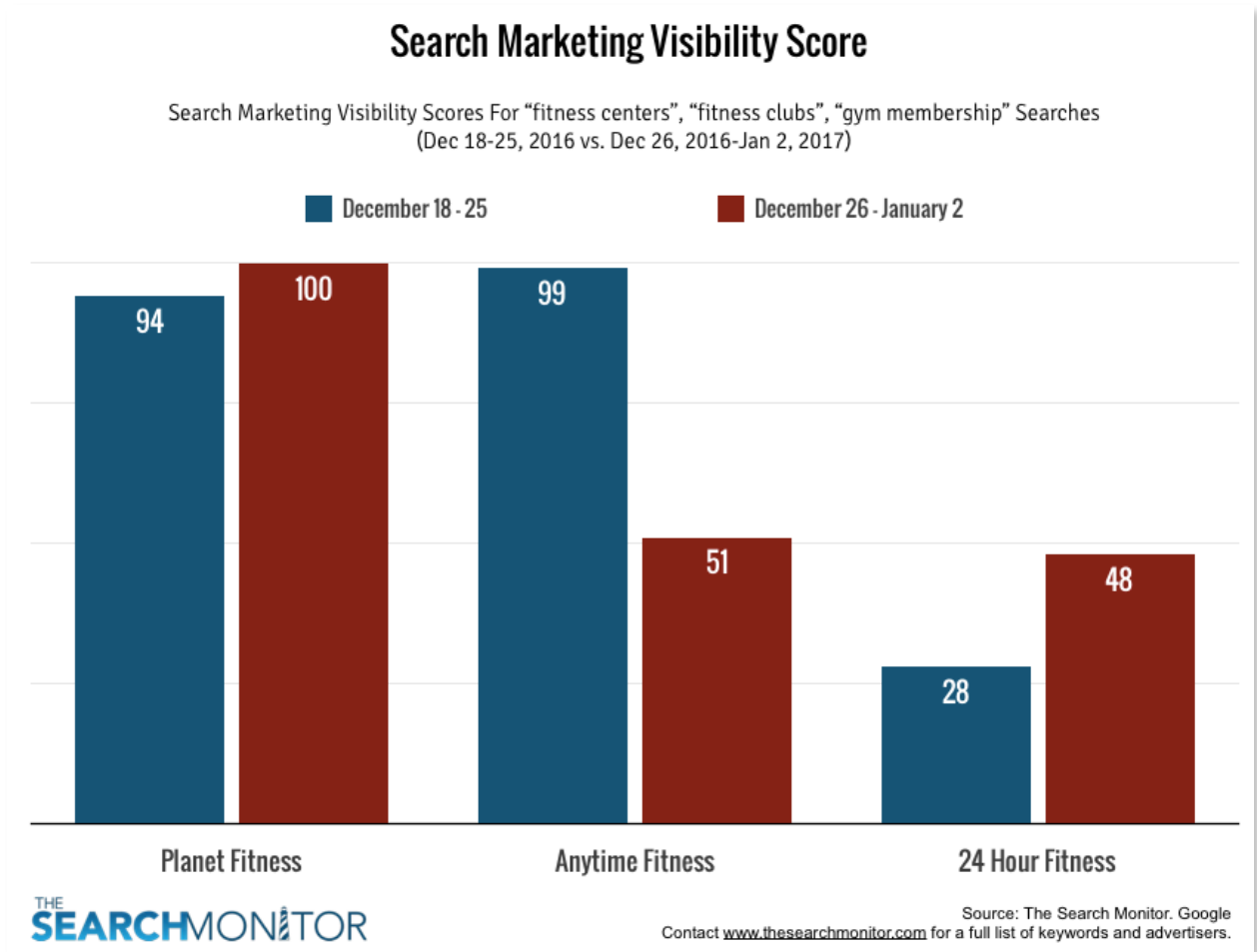
Highlights:

- ▶ **Planet Fitness:** Planet Fitness maintained the market share lead over the two weeks leading up to the new year, with **close to 80% market share** several days during the time period monitored. It's interesting to see the sharp drop off on January 2nd. We will be curious to check back in to see if that trend continues.
- ▶ **24 Hour Fitness:** Held a consistent market share throughout the time period monitored. Does this mean 24 Hour Fitness did not change their strategy leading up to the new year?
- ▶ **Anytime Fitness:** Anytime Fitness had the lowest market share in our comparison, which is interesting considering their visibility score over the two week time period monitored (see below). But, you'll see their share did jump to match that of 24 Hour Fitness the day after New Year's. Could this be the start of a strong January PPC push?



Gym Membership Search Marketing Visibility

What this metric reveals: The Search Monitor's Search Marketing Visibility Score™ (SMVS™) indicates a company's likelihood to receive a click given its competitors' presence. Here's what we found:



Highlights:

- ▶ **Planet Fitness:** Planet Fitness had high visibility both weeks monitored, scoring second in visibility the week leading up to Christmas, and the **highest score possible (100)** the week leading up to January 1st.
- ▶ **Anytime Fitness:** Anytime Fitness came in **1st for visibility the week of December 18-25 (99)**, but dropped off the following week.
- ▶ **24 Hour Fitness:** Held the 3rd place spot both weeks, **increasing their visibility score from 28 to 48 leading up to January 1st.**

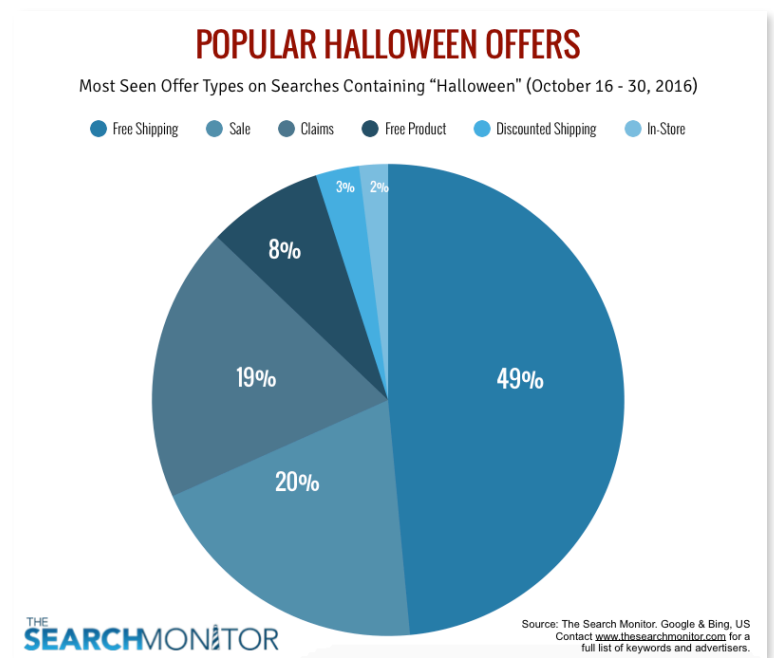


Popular PPC Offers for Halloween

Keeping your PPC offers competitive and relevant is essential in e-commerce. Armed with the right offer intelligence, it becomes easier to create compelling offers (that stand out from the competition), improve your clickthrough rates, and drive sales. Get Started is a great place to start for this. It gives you the scale and city-by-city coverage that you can't get from manual searches. We turned our ad monitoring platform towards the most popular offer types seen in the two weeks leading up to Halloween. The chart below shows the most popular offers for searches containing "Halloween" during the second half of October.

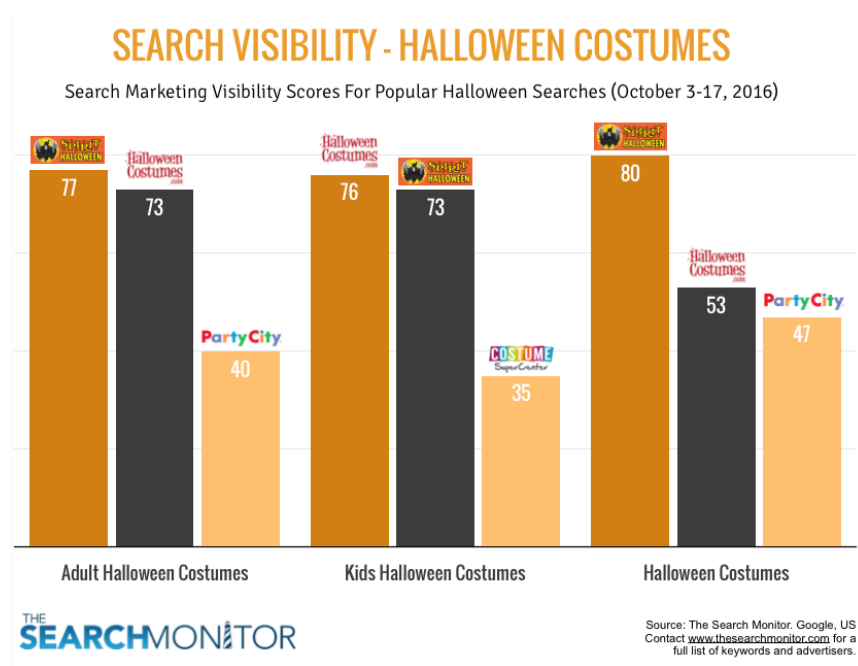
Most Popular PPC Offers

- ▶ **Free Shipping was by far the most popular offer.** 49% of all offers included "free shipping" in the ad copy. Maybe to attract those last-minute costume shoppers?
- ▶ **Sale and Claims were #2 and #3, respectively, when it comes to most-seen offers,** with 20% and 19% of all offers. The 'claims' offer type includes boastful ads with words such as best, guaranteed, lowest, and greatest. You can now monitor these types of ads for competitors or partners. Are you boasting as much as you should be to stand out from competitors?
- ▶ **Free Product**, which used to be more commonly used, only appeared in 8% of the ads we monitored.



Which advertisers appear most for Halloween costume searches?

Which retailer had the highest search marketing visibility for halloween costume searches? It's always fun to compare online marketing performance for retailers. In honor of Halloween, we focused on searches for Halloween costumers to find out which retailers were the most visible to their searchers. The metric we used takes into account both appearances and ranking for PPC, SEO, and PLA. Here's what we found:



Was there a clear winner?

For the three Halloween costume searches analyzed, **SpiritHalloween.com** and **HalloweenCostumes.com** had the highest search visibility, with SpiritHalloween.com consistently scoring above 70. If we had to give a prize for "best search marketing visibility score", SpiritHalloween would be the winner.

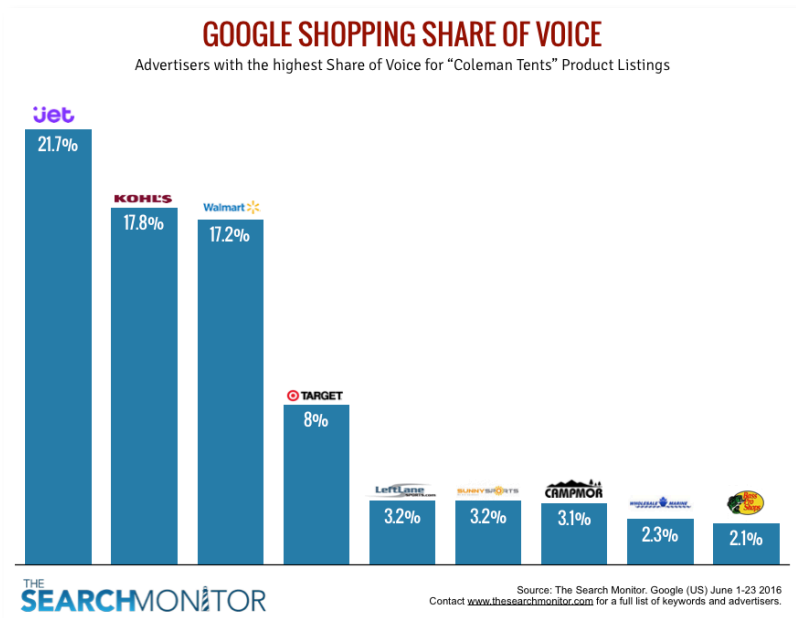
Share of voice for Google Shopping Ads

We looked at which outdoor advertisers had the highest Search Marketing Visibility Score. Today we wanted to analyze which retailers had the highest Share of Voice for Google Shopping ads. The Google Shopping **Share of Voice Report** shows the market share for all competitors.

The SOV is calculated by dividing the number of listings for the seller by the total number of Google Shopping listings for a specific keyword or keyword group. So, which retailers have been doing the best job capturing shoppers' attention? We looked at the very popular keyword "Coleman Tents" Here's what we found:

Who saw the highest Shopping Share of Voice?

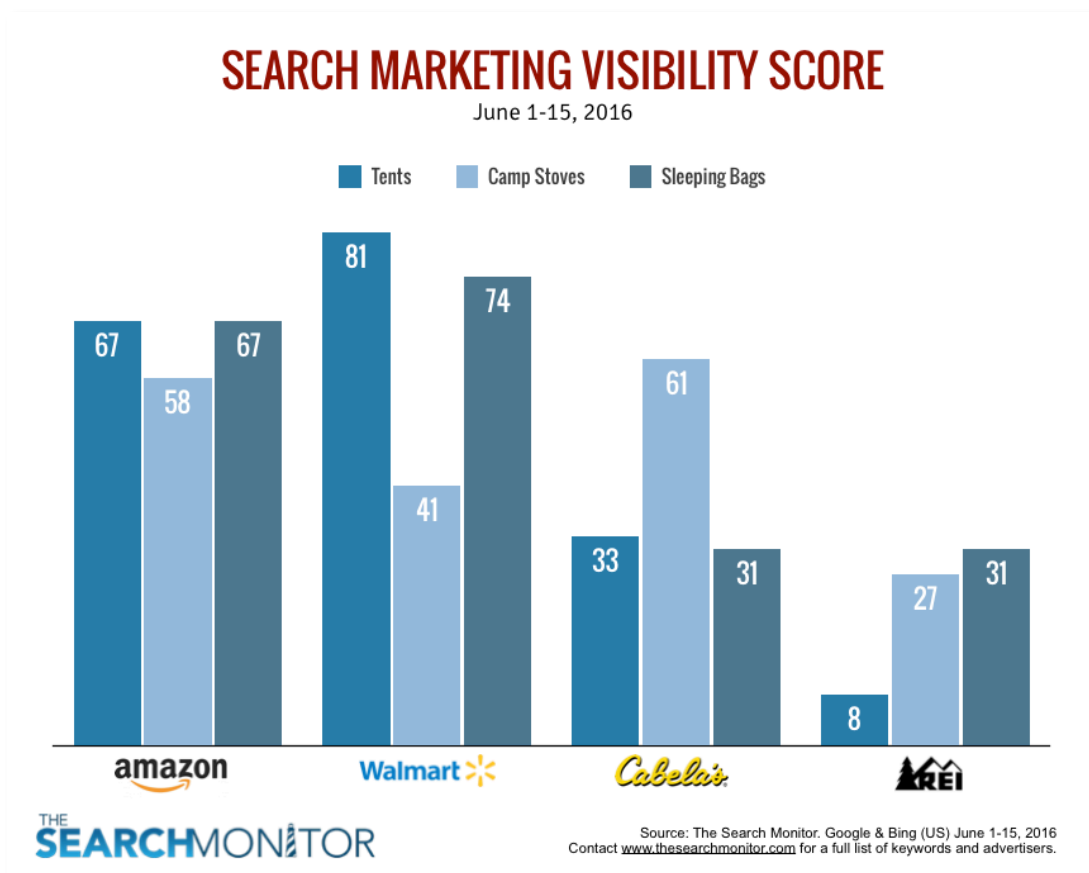
Congrats to **Jet.com** for gaining the most share of voice for the keyword "Coleman Tents"! Kohl's and Walmart also performed well, with Target coming in 4th. The chart shows that the top advertisers fell into roughly three groups of SOV. If you advertise on these terms, how do you compare?



Which outdoor retailers have the highest search marketing visibility?

The Search Marketing Visibility Score™ (SMVS) is the best way to see who won the head-to-head battle for search engine visibility. This grade for search marketers measures a company's search presence across the entire results page (a.k.a. SERP)—Paid, Organic, and Product Listing Ads (PLA)—and adjusts it for a company's specific competition.

We looked at keywords for tents, camp stoves, and sleeping bags in the U.S. for Google & Bing searches.



Which advertisers scored the highest?

- ▶ **Walmart** scored highest for 2 out of 3 keyword groups analyzed (tents and sleeping bags). Look at that amazing 81 score for tent searches!
- ▶ **Amazon** held steady in 2nd place for all three keyword groups. Consistency can be an effective strategy.
- ▶ **Cabela's** was the leader for camp stoves, with a Search Marketing Visibility Score almost twice as high as their score for tents and sleeping bags. Does Cabela's focus fewer search resources on those searches?
- ▶ **REI** struggled with visibility for tents, scoring considerably lower than the other true outdoor retailer profiled, Cabela's.

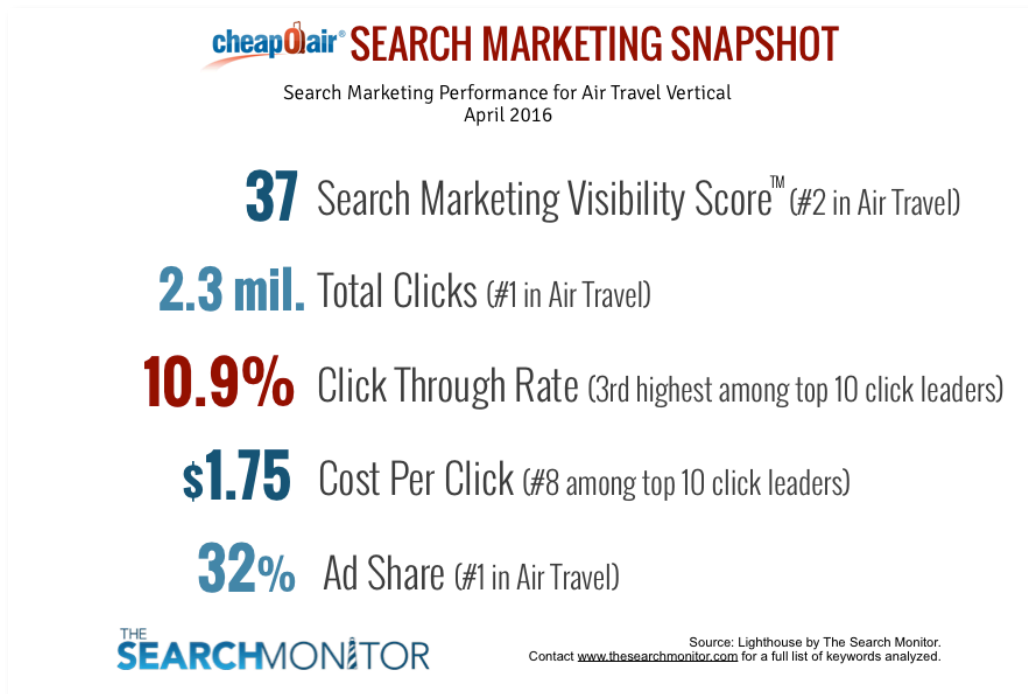
We found it interesting that Walmart and Cabela's had a wide range of scores for the different keyword terms. Is this part of their strategy to focus on particular products?



Search Marketing Snapshot: CheapOAir

As search marketing professionals, it's important to set benchmarks based on the performance of industry leaders. Plus, it's human nature to want to know what our competitors are up to. With summer travel already in full swing, we decided to see how the best of the best have been performing. For this Search Marketing Snapshot, we analyzed the **Air Travel vertical**. In particular, we focused on **CheapOAir**, which we see often in our **ad monitoring platform**.

The air travel vertical is incredibly competitive in search marketing, so it pays to monitor KPIs frequently. When we dove into our ad monitoring data for **CheapOAir**, we saw they were the clear leader in Clicks and Ad Share, two of the most sought-after PPC performance metrics. Further, they also came in 2nd for the all-important Search Marketing Visibility Score (SMVS), which measures an advertiser's total page visibility among paid ads and organic listings. **Congrats, CheapOAir!**



Search Marketing Snapshot: Zappos

We all want to know how we compare to others. It's human nature. And it's especially important as search marketing professionals to set benchmarks based on the performance of industry leaders. We decided to pick one specific industry and see how the best of the best have been performing. For this Search Marketing Snapshot, we analyzed the **Footwear vertical**.

Zappos.com SEARCH MARKETING SNAPSHOT

Search Marketing Performance for Footwear Vertical
February 2016

75 #1 in Search Marketing Visibility

2.6 mil. Clicks leader

3.5% Click Through Rate (4th highest among top 10 click leaders)

\$0.96 Cost Per Click (#7 among top 10 click leaders)

25% 2nd in Ad Share

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Source: Lighthouse by The Search Monitor.
Contact www.thesearchmonitor.com for a full list of keywords analyzed.

Well, the numbers speak for themselves and are quite impressive. **Zappos** was the clear leader when it came to Search Marketing Visibility Score (SMVS) and Clicks. The closest competitor (**Amazon.com**) had an SMVS of 50, and only one-quarter the number of clicks that Zappos generated (647,845). Nice work, Zappos!



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Which Easter retailers had the highest search visibility?

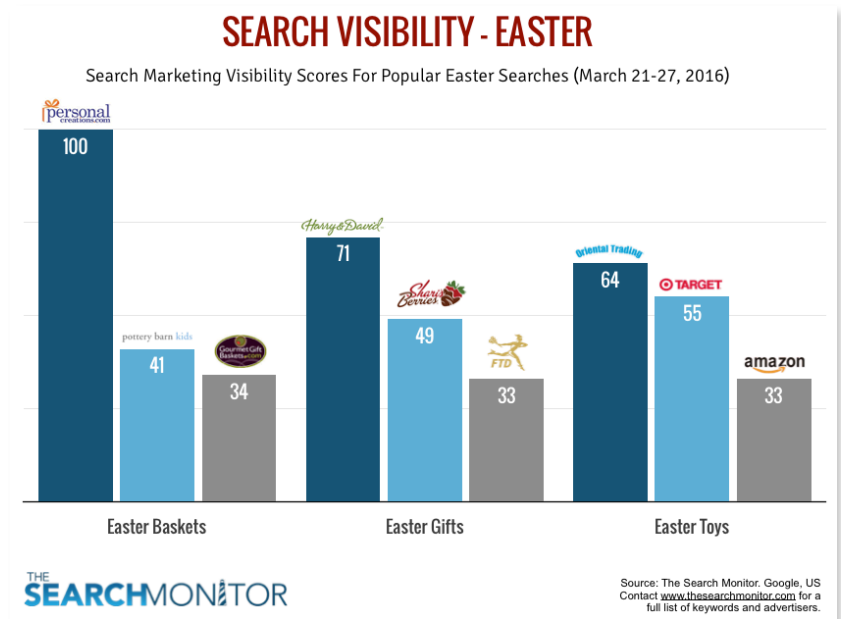
The best way to see who won the head-to-head battle for search engine visibility is to use our Search Marketing Visibility Score™ (SMVS). This stat measures a company's search presence across the entire results page (a.k.a. SERP)—Paid, Organic, and Product Listing Ads (PLA)—and adjusts it for a company's specific competition. To find out the winner, we looked at three popular Easter keywords in U.S. Google searches, and ranked the top three retailers on each keyword.

Which advertisers scored the highest?

Personal Creations had the only perfect score of 100 for the term "Easter Baskets" outscoring the other advertisers on that term by more than double.

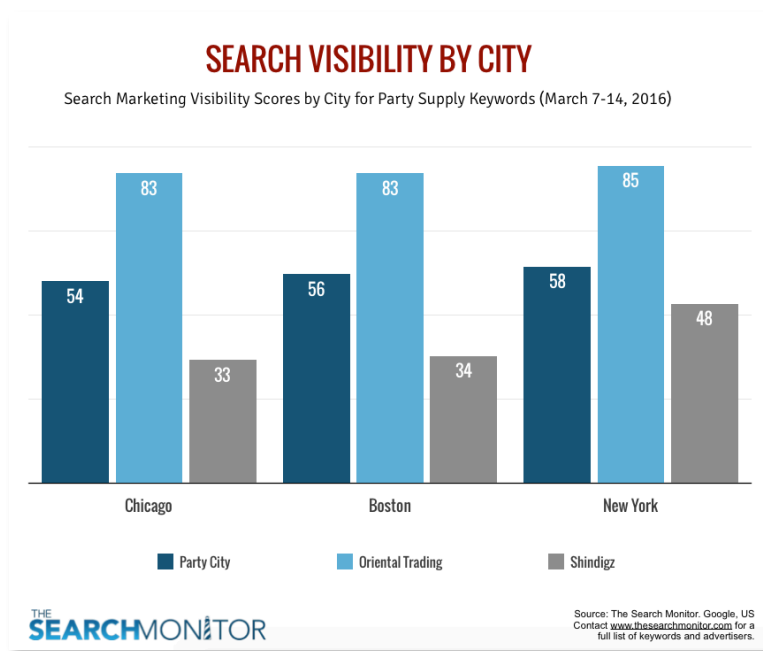
Harry & David bested other advertisers for the keyword term "Easter Gifts", followed by **Shari's Berries** and **FTD**.

It was a closer race for visibility on the keyword term "Easter Toys", with **Oriental Trading** scoring a search marketing visibility score of 64, followed by **Target** with a score of 55.



Search marketing visibility for party supply searches: Does it change by geography?

We're diving into the location of searcher to see if this impacted different companies' search visibility. The best tool for this task is the Search Marketing Visibility Score™ (SMVS). This stat measures a company's search presence across the entire results page (a.k.a. SERP)—Paid, Organic, and Product Listing Ads (PLA)—and adjusts it for a company's specific competition. We analyzed 52 keywords, but in three popular markets: **Chicago, Boston, and New York City**. Here's what we learned:



Oriental Trading

Company and **Party City** were the leaders in these markets with consistent presence across Chicago, Boston, and NYC.

When we looked at **Shindigz**, however, we saw a clear difference. While their score was similar in Chicago and Boston (33 and 34 respectively), their presence was much stronger in New York City (48), earning the same **Organic Share** as Party City.

With just this one chart we received insight into the geo-targeting strategy of this leading party supply store, for this set of keywords.

About The Author



Lori Weiman

Lori Weiman has been creating products for SEM and SEO marketers since 2002. She is a regular speaker at leading search, affiliate, and retail trade shows as well as a regular columnist for Search Engine Land and Search Engine Watch.

Prior to The Search Monitor, Lori co-founded KeywordMax.com (now a division of Digital River, Inc.), a campaign optimization software for SEM

marketers & agencies. Lori started her career at Time Warner Cable as part of the team responsible for inventing on-demand television. She has held executive level positions at several early stage ventures including Click Forensics, Webquarters, and food.com.

About The Search Monitor®

Hundreds of agencies, search marketers, and affiliate managers use [The Search Monitor®](http://TheSearchMonitor.com) to drive greater revenue from online advertising campaigns. The Search Monitor platform provides real-time advertising intelligence to monitor brand and trademark use, affiliate compliance, and competitive advertisers on SEM, SEO, local search, display, mobile, PLAs, and shopping engines worldwide. The platform helps advertisers with compliance issues related to trademarks, affiliate programs, offers, minimum advertised pricing (MAP), content monitoring, and hotel price parity.

The Search Monitor platform also provides competitive insights such as SERP visibility, keyword reach, ad rank, ad copy, popular offers, landing pages, and click and spend data. The Search Monitor data is the most precise available through high-frequency crawling and advanced geo-targeting from thousands of global IP addresses. All data is available through easy-to-use web-based reports, APIs, and automatic alerts that are customizable for 1,200+ verticals.

Learn more at TheSearchMonitor.com.

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