

The diversification of search

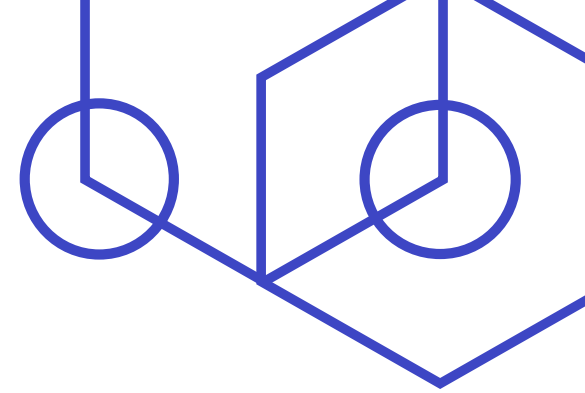
Part of the Marketer's Toolkit 2019



WARC[^]
BY ASCENTIAL



Key takeaways



1

Search is being transformed from a channel dedicated to information into one that can also deliver inspiration.

Brands should re-consider how they deploy search spend and use it across the path to purchase.

2

Amazon now represents an important part of search strategies.

It offers brands unique opportunities to expand their audience but demands a specific creative approach to search.

3


More than any other platform, voice demands that you achieve the top listing as audiences will not scroll through.

Using natural language keywords and learning how your audience thinks about the category is key.

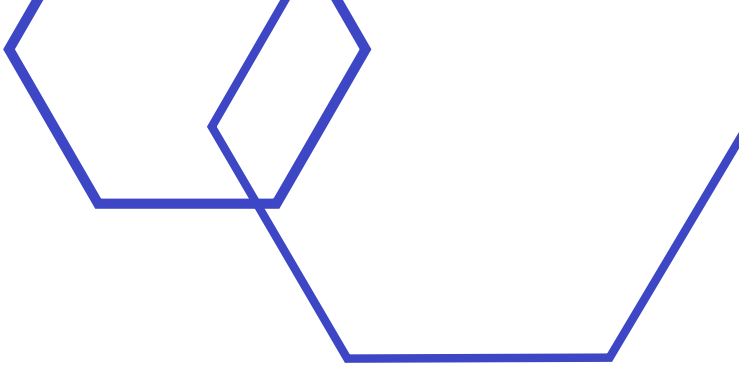
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Visual search is an attractive proposition for an increasingly visual consumer culture.

Searching for products through image capture is intuitive, engaging and a very neat fit with social media behaviour.



Why brands must adopt a new strategy for search in 2019



The disruptive power of Amazon, the switch to conversational-style language, and the growth of voice and visual technology are converging to drive the biggest change to search behaviour since the first software began mapping the web a quarter of a century ago.

Search has traditionally converged around three core activities: information-seeking, transactions (shopping, downloading) and navigation (locating specific pages). While these remain at the heart of search activity, the landscape is changing fast.

The share of advertising spend held by paid search has trebled over the past decade and is expected to have accounted for [over a fifth \(21.9%\) of the total in 2018](#). Across WARC's 12 key markets, spend has risen 11% in a year and now tops \$100bn.

This growth is driven, in part, by the confidence with which brands can measure the outcomes of search marketing. In WARC's Toolkit survey, 36% of respondents claimed they can measure the effectiveness of online search "very accurately", more than any other media channel. However, there is also a growing realisation that search can now play a valuable role in delivering brand experience and inspiration.

Brands are especially enthused by the potential for voice search. Some 29% of clients taking part in the Toolkit survey cited voice as the

emerging technology they most expect to be important in 2019, an increase of 12 percentage points on the result from a year ago.

When asked about the application of voice technology in marketing plans, 40% selected voice-optimised search, ahead of content (25%), commerce (20%) and advertising (11%).

Yet voice should not be viewed as a like-for-like switch with on-screen search – the strategy is different, and the stakes are arguably higher. Early research shows that voice driven search [drives twice the level of brand recall](#) of on-screen search, in part due to the fact that fewer results are returned.

Visual search, meanwhile – defined as anything using an image, rather than text, as the search input – is already changing the search landscape, particularly among younger audiences.

From a sample of 6,000 UK consumers, Mindshare found that [over half \(51%\) of those aged between 18 and 34](#) have carried out a visual search. More importantly, it sits well within

Why brands must adopt a new strategy for search in 2019

an increasingly visual culture. Three-quarters of US internet users “regularly or always” search for visual content before making a purchase, according to eMarketer.

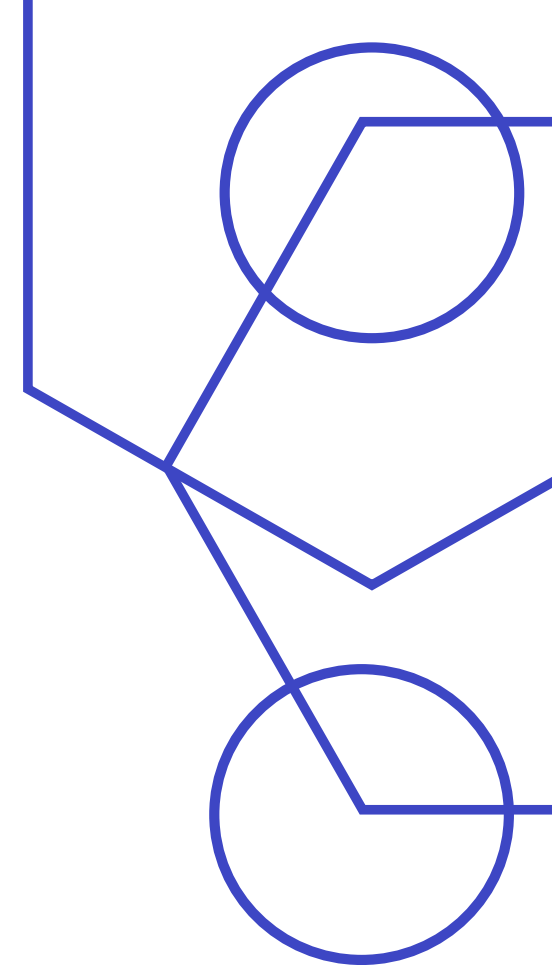
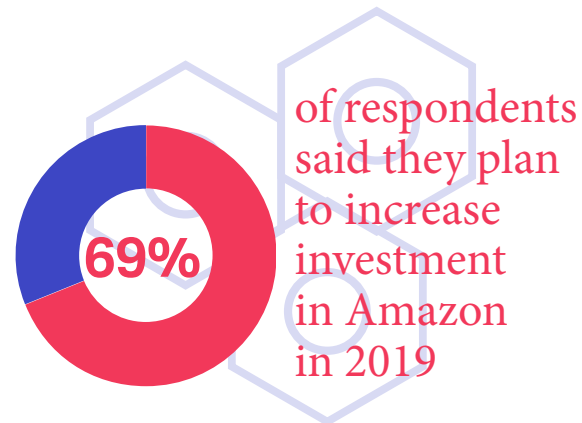
Smartphones are again facilitating growth here, enabling users to take a picture and, with the click of a button, learn more about the item and where to buy it. It is an attractive proposition for the consumer: intuitive, engaging and a very neat fit with social media behaviour. For brands, this shortens the path to purchase, and [early innovators such as ASOS have proven how well the tech can work](#).

Finally, with [half of all product searches](#) in the US starting on Amazon, it would be wrong to assume that the future of search is whatever Google, Bing, Baidu et al decide it will be.

Amazon is now [a lifestyle platform beyond pure e-commerce](#). It has engrained itself in people’s lives – in the UK, around 35% of the population are Amazon Prime members; in the US, that figure rockets to 74% – and has achieved new

interactions with its Kindle e-reader and, more recently, its range of Echo voice-activated speakers.

Amazon’s household penetration and alignment with voice search makes it such a potent force that agencies have been [creating specialist divisions](#) devoted to exploiting the opportunity it offers. This is spelled out in the Toolkit survey, in which 69% of respondents said they plan to increase investment in Amazon in 2019, second only to Instagram.





Nate Shurilla, iProspect

A three-step audit to help brands prepare for a voice-activated future

Aligned to changing consumer behaviour and research habits, we have seen a shift away from traditional search towards new mediums – from e-commerce platforms such as Lazada, to visual platforms like Pinterest, and, most recently, voice search.

The more pronounced trend is around voice. In 2018, iProspect conducted research on voice adoption in six key markets across APAC: China, Japan, India, Indonesia, Singapore and Australia. The results were eye-opening. While comScore has predicted that 50% of all searches will be made via voice by 2020, many markets in Asia have already passed this mark. Our research found that 82% smartphone users in India, 77% in China and 62% in Indonesia are currently using voice-activated technology.

Of these users, 65% in India, 46% in China and 75% in Indonesia reported using voice specifically for search. Even in a more conservative market like Japan, with only 40% of smartphone users utilising voice, 59% of those users cite search as their

primary use case. We often speak on the concept of “mobile-first markets”; in Asia, we may very well see the emergence of a voice-first market. Which begs the question—what should brands be doing to prepare for this shift?

At iProspect, we have developed a three-pronged voice audit to help brands identify focus areas to ensure they are optimised for a voice-activated future. There are many synergies between voice search and traditional SEO, and you’ll spot many similarities between this audit and your current SEO strategy.

The first step is keyword research, but with a strong focus on conversational, long-tail keywords and questions. In voice search, featured snippets are often used to answer queries, so checking if your answers are present during these moments is a good place to start.

Second, check the site content. Using question formats like “how do you...?”, “where can I...?” and “what is the...?” can help ensure your

content is best placed to be selected. It is also important that your content is easily crawled using structured mark-up and optimised meta-descriptions.

The final step is to check the health of your site. Load speed is important, as the assistant does not have time to wait for your site to load when answering a vocal query. It also cannot afford to have its one answer be incorrect, so if your domain authority is low, you will need to build up your reputation.



The more pronounced trend is around voice.

Nate Shurilla, APAC Head of Innovation and North Asia Commerce, iProspect

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The Marketer's Toolkit 2019

The Marketer's Toolkit is based on a survey of 800+ client marketers and agency executives around the world, backed by CMO interviews and WARC's case studies and best practice guidance.

[Download the report](#) to get all the data, or read our one of our other [in-depth reports](#) on:

- 📁 In-housing: here to stay?
- 📁 CX: Online to offline
- 📁 Being effective in short-form video

CMO interviews

WARC interviewed nine marketing leaders to get their views on the challenges and priorities for the 2019 – find out what they had to say.

[Amanda Hill](#)

Chief Marketing Officer, Harrods

[Lis Blair](#)

Chief Marketing Officer, EasyJet

[Lisa Ronson](#)

Chief Marketing Officer, Tourism Australia

[Jalin Wu](#)

Chief Marketing Officer, Uniqlo China

[Freddie Covington](#)

Senior Vice President, Marketing, APAC, Visa

[Josh Mueller](#)

Global Head of Marketing, Dun and Bradstreet

[Sam Thomson](#)

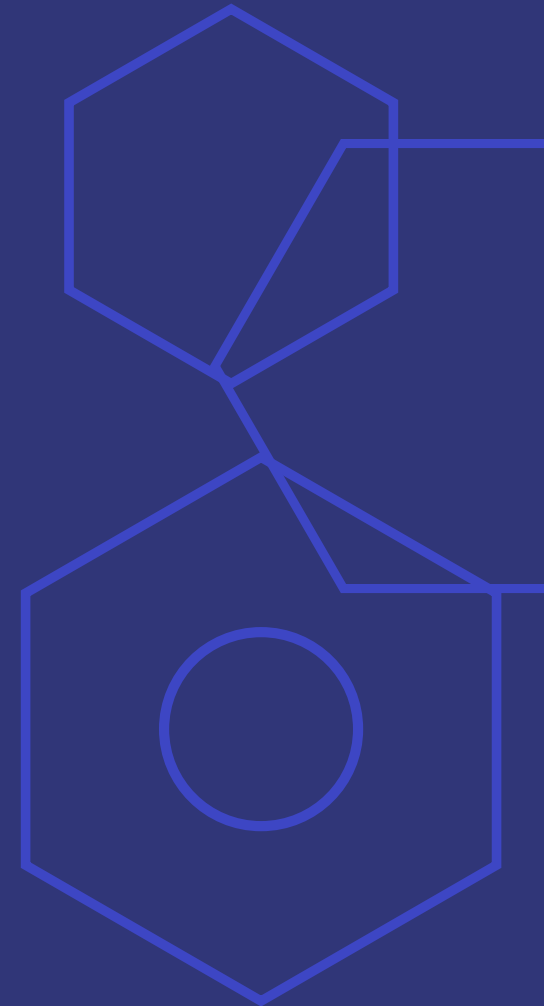
Business Design Lead, The Body Shop

[Mark Evans](#)

Marketing Director, Direct Line Group

[Fernando Machado](#)

Chief Marketing Officer, Burger King



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Case Finder

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Contact Us

London
85 Newman Street
London
W1T 3EU
United Kingdom
+44 (0) 20 7467 8100
enquiries@warc.com

Washington DC
2233 Wisconsin Ave NW
Suite 535
Washington, DC 20007
United States
+1 202 778 0680
americas@warc.com

Singapore
OUE Downtown 1, #44-03
6 Shenton Way
Singapore 068809
+65 3157 6200
asiapacific@warc.com

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