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# Retail Searchology

A Discussion About the State of Search

Google/Compete  
U.S., June 2009

# Methodology for “Changing Role Of Search” Focus Groups

## Research

7 3-day Online bulletin boards  
May 27 - June 10 | 84 participants total

To understand the why’s behind the purchase decision process, the role of search, search behavior, and how the mindset and process have changed

### Why online bulletin boards?

- We can talk to more respondents across diverse geographies and/or target audiences
- Respondents can participate at their leisure each day, leading to greater depth and engagement
- Uninfluenced responses allow participants to speak their mind first, then comment on others’ answers; respondents can then return to the discussion to interact by commenting on others’ postings
- Like traditional research, we have the ability to add/refine questions at any time and probe individuals or the entire group during the course of the discussion

## Participants

### In the last 6 months, must have done one of:

- Used Search engines to inform their decision
  - Have used search engines for research for more than 2 years and do so at least every couple months
  - Make online purchases at least every couple months
  - At least 3/4 per group use Google
  - 3/4 must work full-time, except in education group
  - Age criteria 18-64, varied by group
  - Some college or higher
  - HHI 40K+, except Investment group 150K+
1. Bought a [home improvement](#) item
  2. Bought [apparel or shoes](#)
  3. Bought [consumer electronics](#)

# Searchology: Key Trends

**1** Focus: value & deals, savvy searchers

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**2** More research, more Search

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**3** Search driving more site visits, more conversions, and more qualified visitors

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# Consumers Have Changed How They Shop



*“I have spent more time trying to find exactly what I am looking for instead of settling for something cheaper that might not be the exact thing.”* – APPAREL

*“If it’s not broke, I’m not fixing it right now.”* – HOME IMPROVEMENT

*“I am buying fewer items because my budget has been downsized.”* – CONSUMER ELECTRONICS

*“I have been more patient with waiting for items to go on sale and shopping multiple websites for the best deal.”* – APPAREL



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Source: “Changing Role of Search” Focus Groups, May 27-June 10, 2009

# Consumers Are Focused on Value & Deals



***“No purchase is made without at least attempting to locate a coupon code for 15-20 minutes.”*** – APPAREL AND SHOES

*“I have shopped on line more frequently than last year because many companies offer free shipping.”* – APPAREL AND SHOES

*“I try to use coupons 100% of the time, I look for them 100% of the time.”* – CONSUMER ELECTRONICS

***“Yes, I am more willing to invest more time in locating a bargain in comparison with one year ago.”*** – HOME IMPROVEMENT

*“I research products more thoroughly now to be sure I’m getting the best quality for the price.”* – HOME IMPROVEMENT



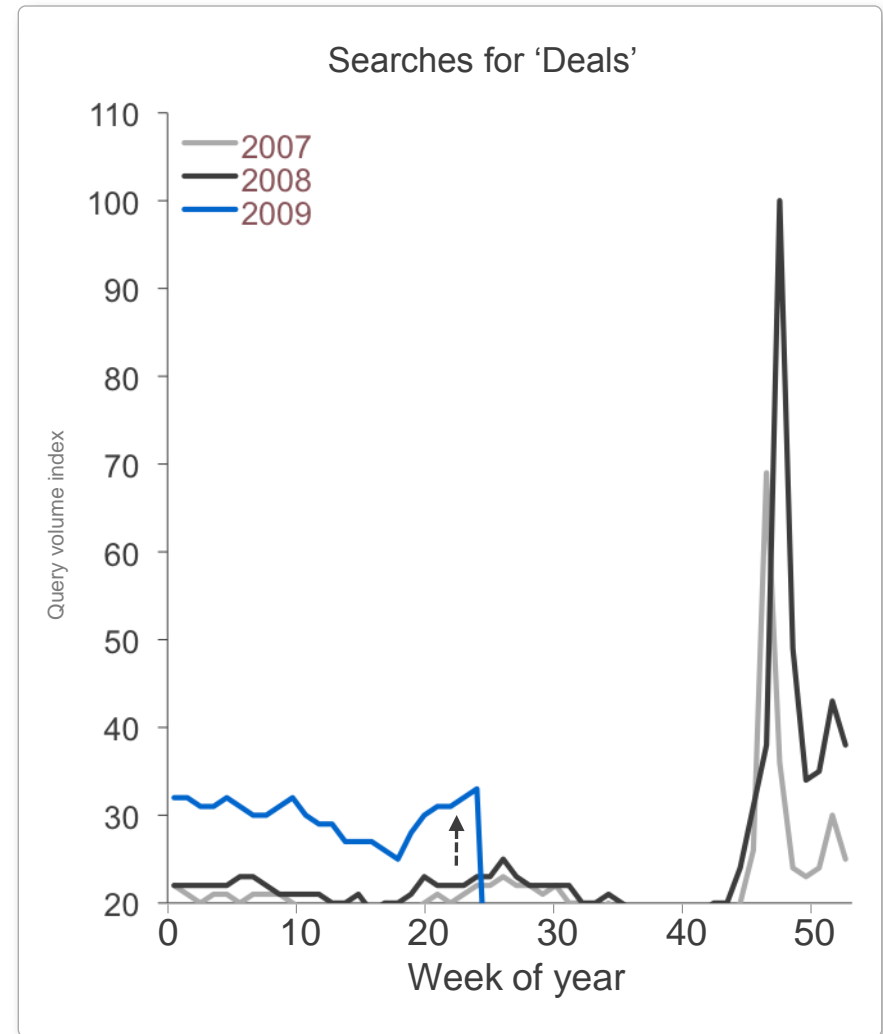
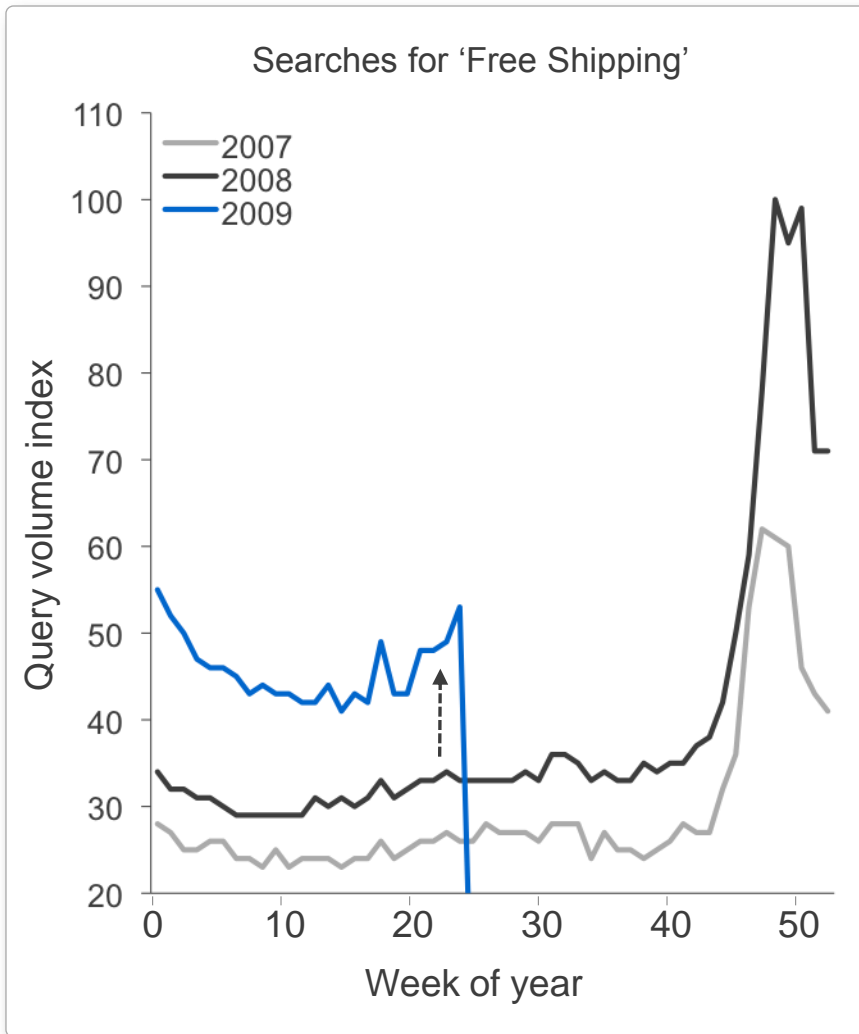
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# Heightened Interest in “Free Shipping” & “Deals”

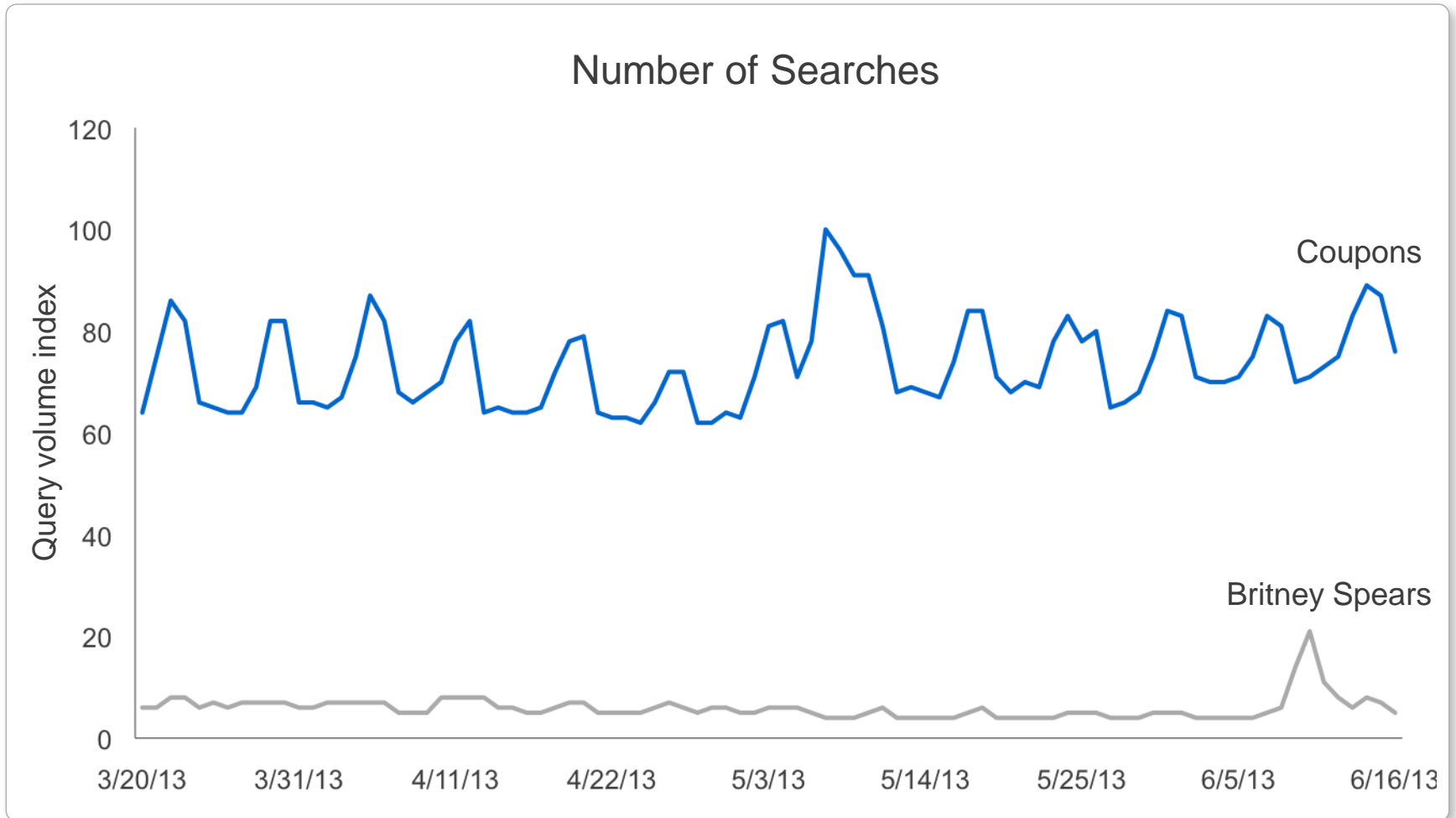


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# “Coupons” are Bigger than “Britney”



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# Consumers Are More Sophisticated Searchers



*“I think as I have become more proficient using the internet, I have found the most specific you can be on using a search engine, the better the results of finding what you want. That usually involves using more key words.” – APPAREL & SHOES*

***“If I want a Nike backpack, searching for only the term “backpack” is very counter-productive and, frankly, a rookie mistake.” – APPAREL & SHOES***

*I will find the model online at homedepot.com. Then I will type into Google, ‘Ryobi Table Saw XYZ review’ and see those reviews as needed.” – HOME IMPROVEMENT*

*“I have learned to be much more specific. So I would use brand name keywords to ensure I didn’t get a lot of useless information.” – CONSUMER ELECTRONICS*

***“I need a pole tree trimmer, so I just entered ‘pole tree trimmer’ in Google, and then Black & Decker and Ski I came up, so I searched ‘Skil pole tree trimmer reviews’.” – HOME IMPROVEMENT***



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# Researching More Overall



*“The economy has got me researching like never before.”* – HOME IMPROVEMENT

*“I am doing more research so I can make a purchase confidently.”* – CONSUMER ELECTRONICS

*“I do more research now in order to save time and money.”* – CONSUMER ELECTRONICS

*“I research until I am comfortable with my decision regardless of how much time is spent.”* – HOME IMPROVEMENT



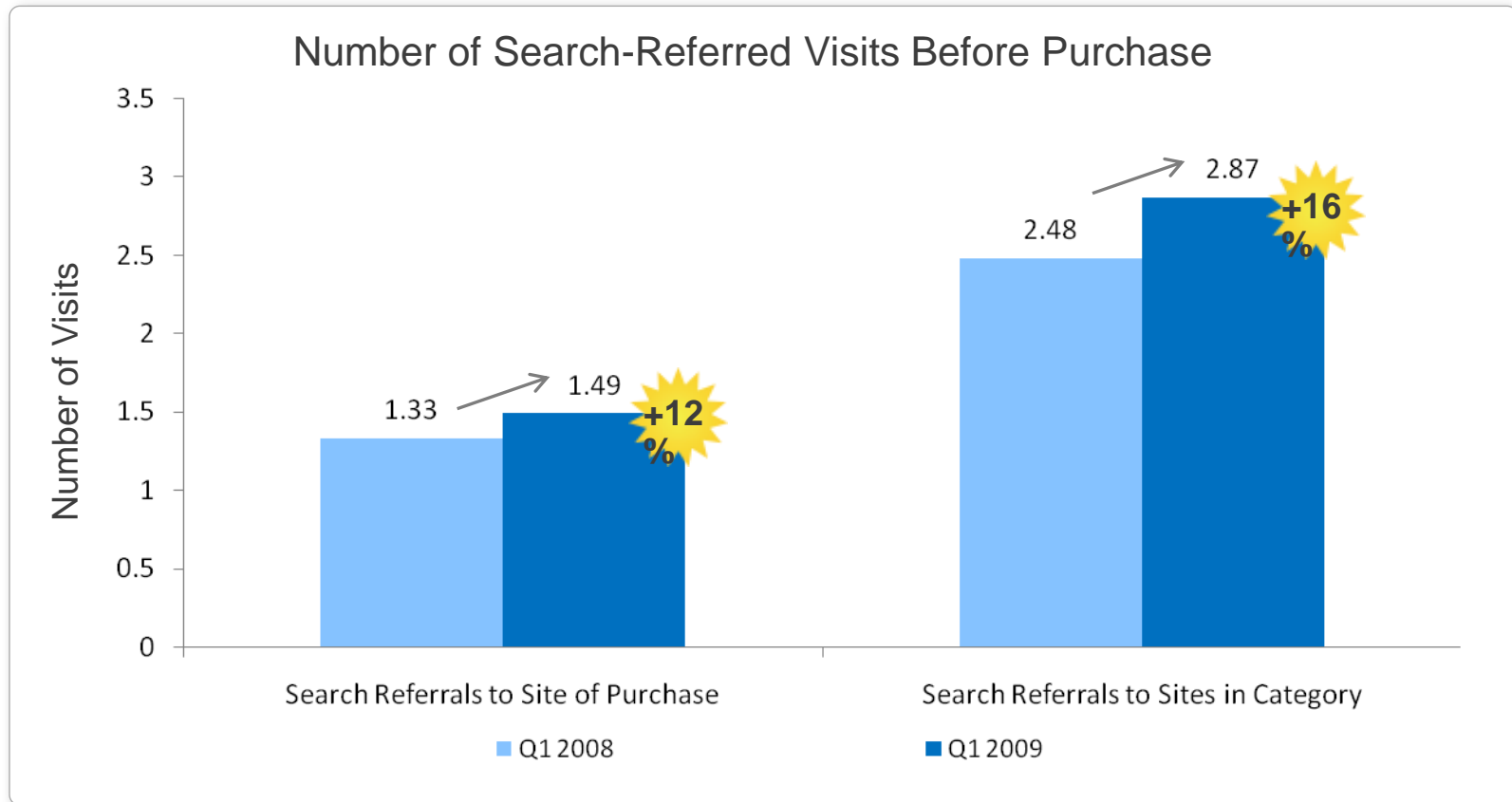
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with Google Source: “Changing Role of Search” Focus Groups, May 27-June 10, 2009

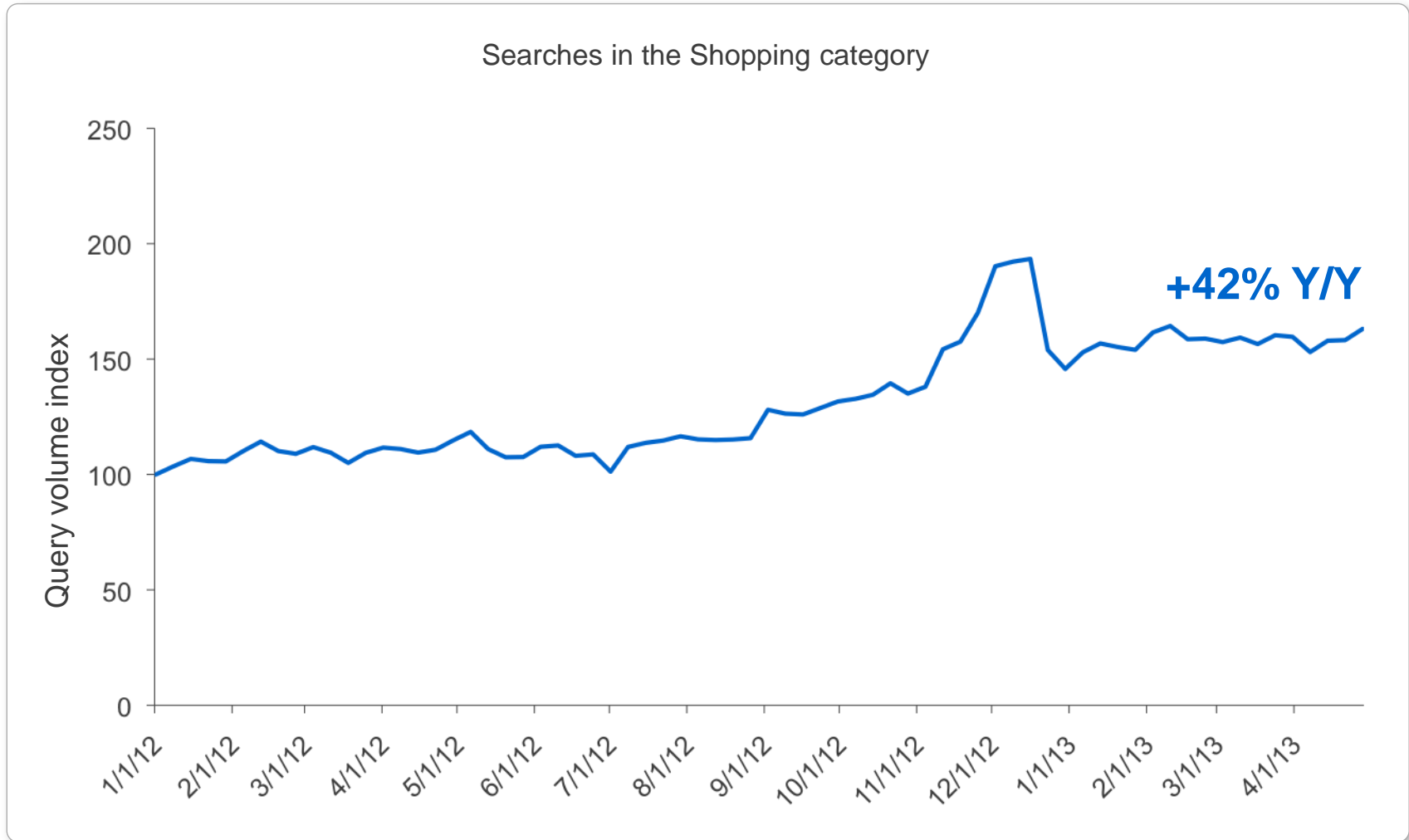
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# Home Furnishings Consumers Are Shopping Around Before Purchasing

Consumers are doing more research, visiting more sites before purchasing.



# Search is Growing, Too



# Search is Integral to Research



*“I use search engines more and more because I use them to try and save a few dollars, and I’ve just learned how many ways are out there for me to save money.”*

– HOME IMPROVEMENT

***“If I didn’t know a brand, I would use [search] until I found consistently positive reviews and select the product....When I selected the style, I would use the [search engine] to find the best price.”*** – APPAREL

*“Search engines seem to be more up to date and instant whereas catalogs and fliers go out of date”* – HOME IMPROVEMENT



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Source: “Changing Role of Search” Focus Groups, May 27-June 10, 2009

# Why Consumers Search



## 1. Category information

*“In the beginning I just use a simple start for a search - At the start I want as much general info I can get - because maybe there’s something new out there I should know about.”*  
– CONSUMER ELECTRONICS



## 2. Product information

*“I found some brands using the search engine and then looked up the retail and manufacturer sites, since those seem to have more extensive product descriptions.”*  
– HOME IMPROVEMENT



## 3. Price information

*“I use search engines to find coupons 100% of the time.”*  
– HOME IMPROVEMENT  
*“They are most effective for comparing prices. This has not changed.”*  
– APPAREL & SHOES



## 4. Link to Store / Offline

*“I use the search engine to locate the closest store.”*  
– HOME IMPROVEMENT  
*“I start researching online, and then I head to the store...Researching online prepares me for the store.”*  
– HOME IMPROVEMENT





# Search is the Go To Source to Find Coupons



*“I now use search engines to get the best price of all items.”* – HOME IMPROVEMENT

*“I find the product I want, then the retailer I want to shop. I then search for coupons for the product and retailer.”* – HOME IMPROVEMENT

*“I use search engines when I am having difficulty in finding the item I am looking for. I also use them to compare prices.”* – APPAREL AND SHOES

*“100% of the time I am searching for the code or a site that might have a code using the search engine. I never go directly to a coupon site.”* – CONSUMER ELECTRONICS

*“I use search engines to find coupons 100% of the time.”* – HOME IMPROVEMENT

*“Once I find the best of whatever I'm looking for, I then focus on searching for the best price.”* – CONSUMER ELECTRONICS



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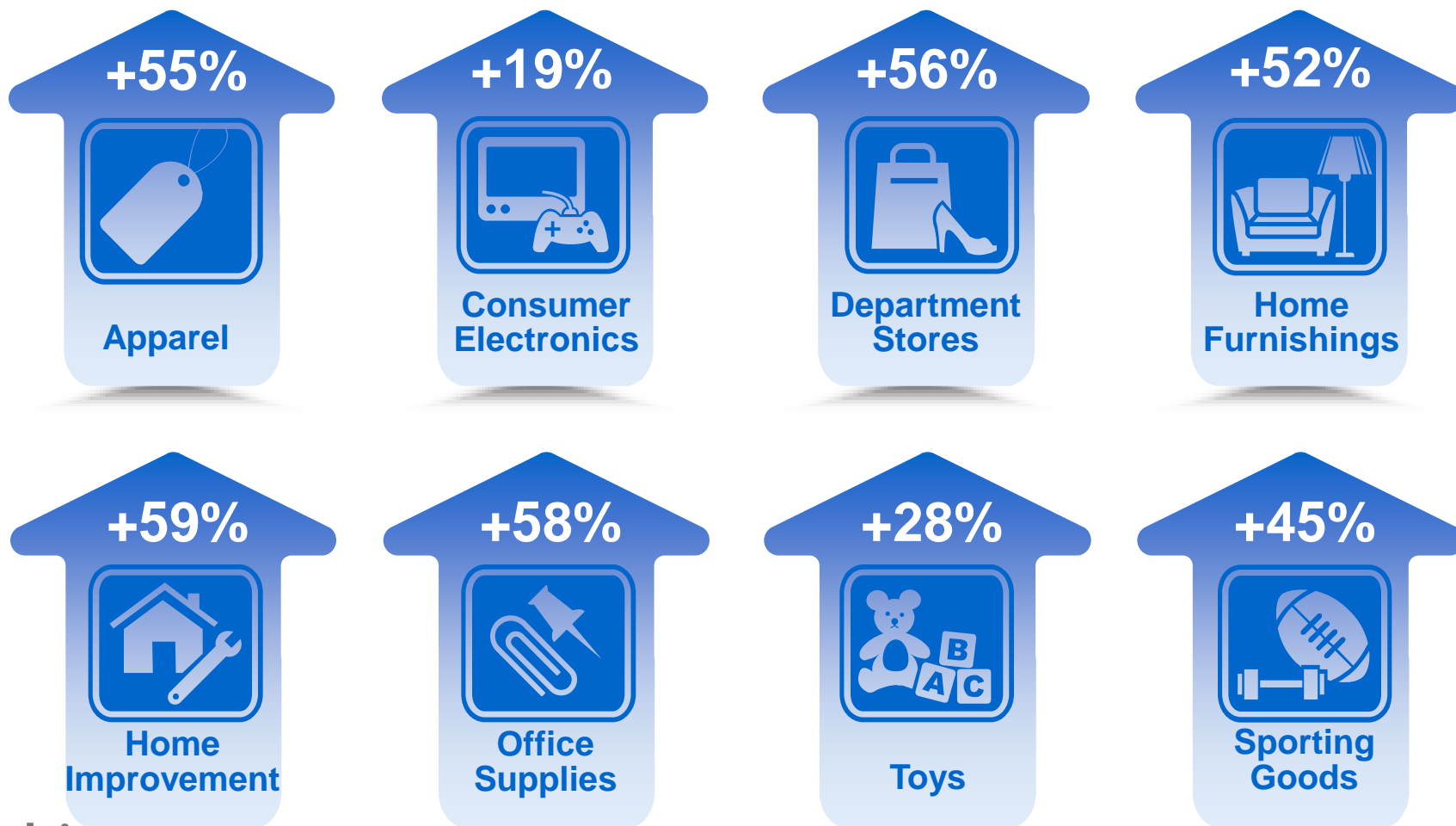
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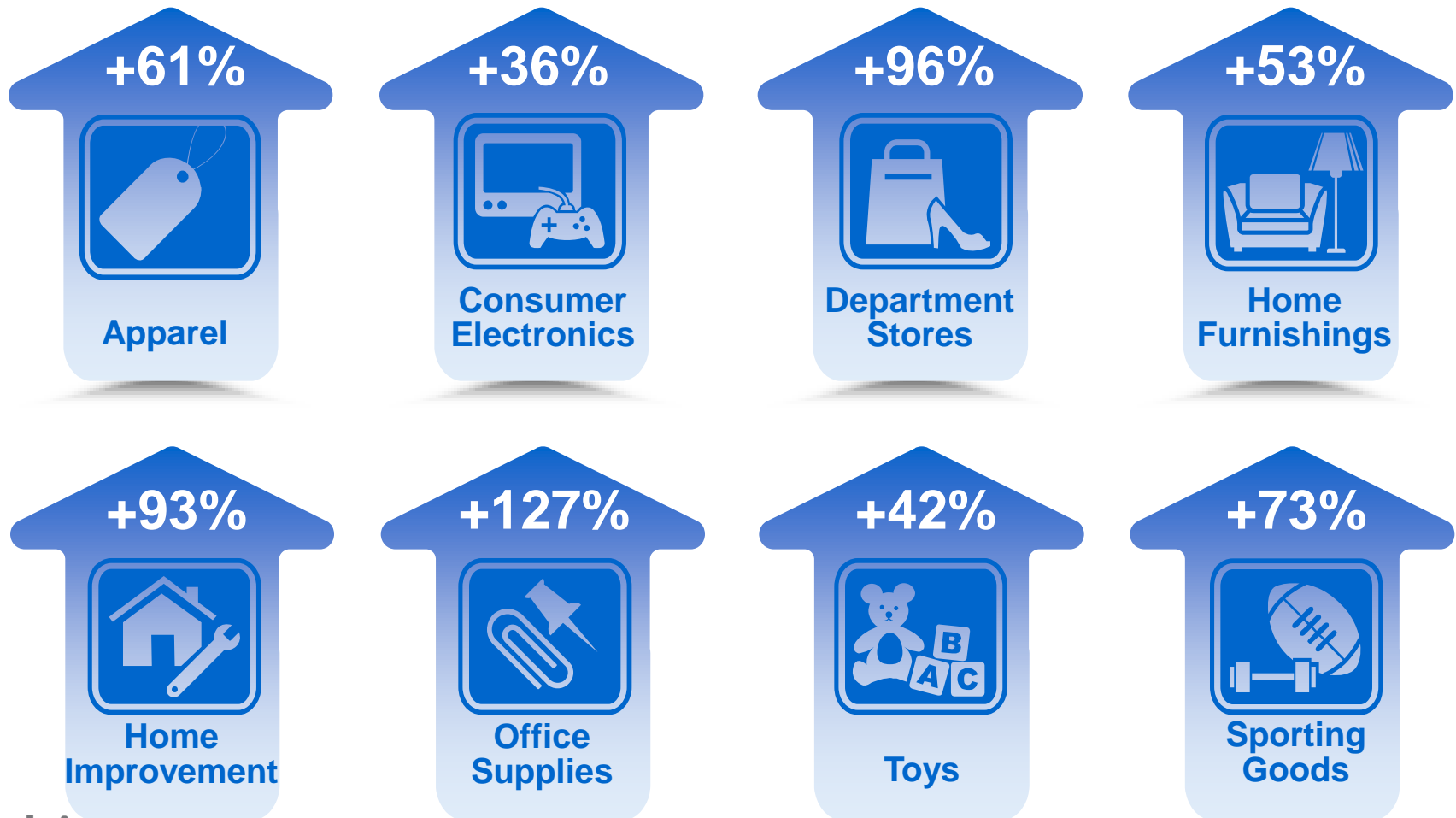
# Search Driving More Site Visits Across the Board

Search-driven referrals have increased dramatically year-over-year.



# Search is Driving More Conversions than Ever

Conversion rate growth outpaces search referral growth across the board—search is bringing more qualified traffic than ever before.



# Summary of Retail Searchology: Key Trends

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