Key Findings

- Brand search visibility and online sales are highly correlated. The impact, however, varies by product category and price point.
- For most categories, a brand’s “second-order” search visibility via retailer results has a higher impact on sales than brand-owned results.
- Site content investments drive conversion in research-oriented categories like complexion and skincare, where brand.com content is more advanced than retailer assets.

What Brands Should Be Thinking About

- **Leverage Retailers:** Prioritize co-op bargaining chips for categories where retailer Shopping Ads have the highest impact on sales: prestige color cosmetics and complexion products, especially around holiday shopping events.
- **Focus on Content:** Invest in educational content on brand sites for highly differentiated product types (complexion, skincare)—which cater to research-oriented shopping behaviors, drive conversion, and differentiate DTC from retailer experiences.
- **Strategy Varies by Price Point:** To maximize the impact of search visibility on sales, prestige brands should focus on SEO investments against hero products, while mass brands will need to reach a critical threshold of visibility to see a return.

Beauty US: Indexed Total Prestige Color Brand Transactions vs. Average Weekly Visibility in Retailer Shopping Ads

Color Cosmetics: Top Unbranded Keywords Searched on Google
Q4 2017, n=2,168 Color Cosmetics Keywords (e.g. “mascara”)

Source: Gartner L2 analysis of Rakuten Intelligence data.

Searching for New Consumers

Beauty shoppers are less brand loyal than ever, with a quarter trying products from new brands each month.¹ Search catalyzes much of this trial, making it a key discovery vehicle for consumers. An overwhelming majority of top color cosmetics and skincare searches do not reference brands or brand products—suggesting ample opportunity to influence purchasing decisions. As a result, visibility against unbranded search queries—via brand-owned properties or retailer partners—is a top priority for brands looking to attract new customers.

This report was produced in collaboration with Rakuten Intelligence, formerly known as Slice Intelligence to evaluate the impact of search visibility on brand sales. While search visibility impacts sales, nuances exist between product categories.

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