

# What it means to have a winning website

Health and beauty: Makeup



 **ORGANIC**

# Contents.

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Introduction	<b>2</b>
Summary	<b>3</b>
Understanding your audience and owning your space	<b>6</b>
Working with super-sites and direct to customer	<b>10</b>
Key takeaways	<b>12</b>

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The question ‘*what does it mean to have a winning website*’ is a multifaceted one. The simple answer is pointing to ranking and visibility scores to quickly declare a winner. But, in reality, there’s much more to the answer than that.

The context of the changing digital marketing landscape has rendered a clear understanding of opportunity and risk more important than ever for ecommerce brands. There are three broad areas of concern:

### **Consumers**

- They are savvier than ever before
- We need to understand what makes consumers choose one brand over another

### **Market**

- It’s shrinking! New hungry brands are vying for the same space as other established brands
- How can brands cut through the noise to maintain their space and grow?

### **Unknown unknowns**

- Algorithm updates - changes to regulations - COVID-19. Brands need to be able to get data quickly to make smarter decisions before their competition. This will help them overcome any unknown challenges that lie ahead.

For large ecommerce brands, constant evolution is a case of do or die. Many have struggled or failed in the past year as pandemic restrictions and the resulting changes in consumer behaviour exposed weaknesses in their current digital setup.

Those that have escaped extinction must commit to becoming a more effective digital presence. But for many brands, this shift is a serious operational evolution.

By understanding ‘*what it means to have a winning website*’, brands can work out how they stack up. It allows them to put a microscope on specific categories and then make smarter decisions to “win” in that area.

## Broad areas of concern



However, to gain this true understanding, we need to peel back the layers. It's not as simple as looking at a domain, or even a category, because different audiences and competitors will be relevant to some brands but not others. To get a good

understanding of who is winning, and what that means, we need to choose a vertical and dig deep. For this report we will be focusing on makeup, but the techniques and processes used are relevant for any ecommerce vertical.

# What do we want to know?.

The go-to data points in SEO are visibility and ranking information – both relevant and sensible criteria. These metrics provide clear quantifiable data on where a brand is in comparison to its competitors.

However, when we consider *‘what it means to have a winning website’* a base level of rankings versus competitors doesn’t cut it.

## **Brands must:**

- Understand the market
- Understand the opportunity
- Understand the customer
- Be where the customer is
- Create an amazing environment



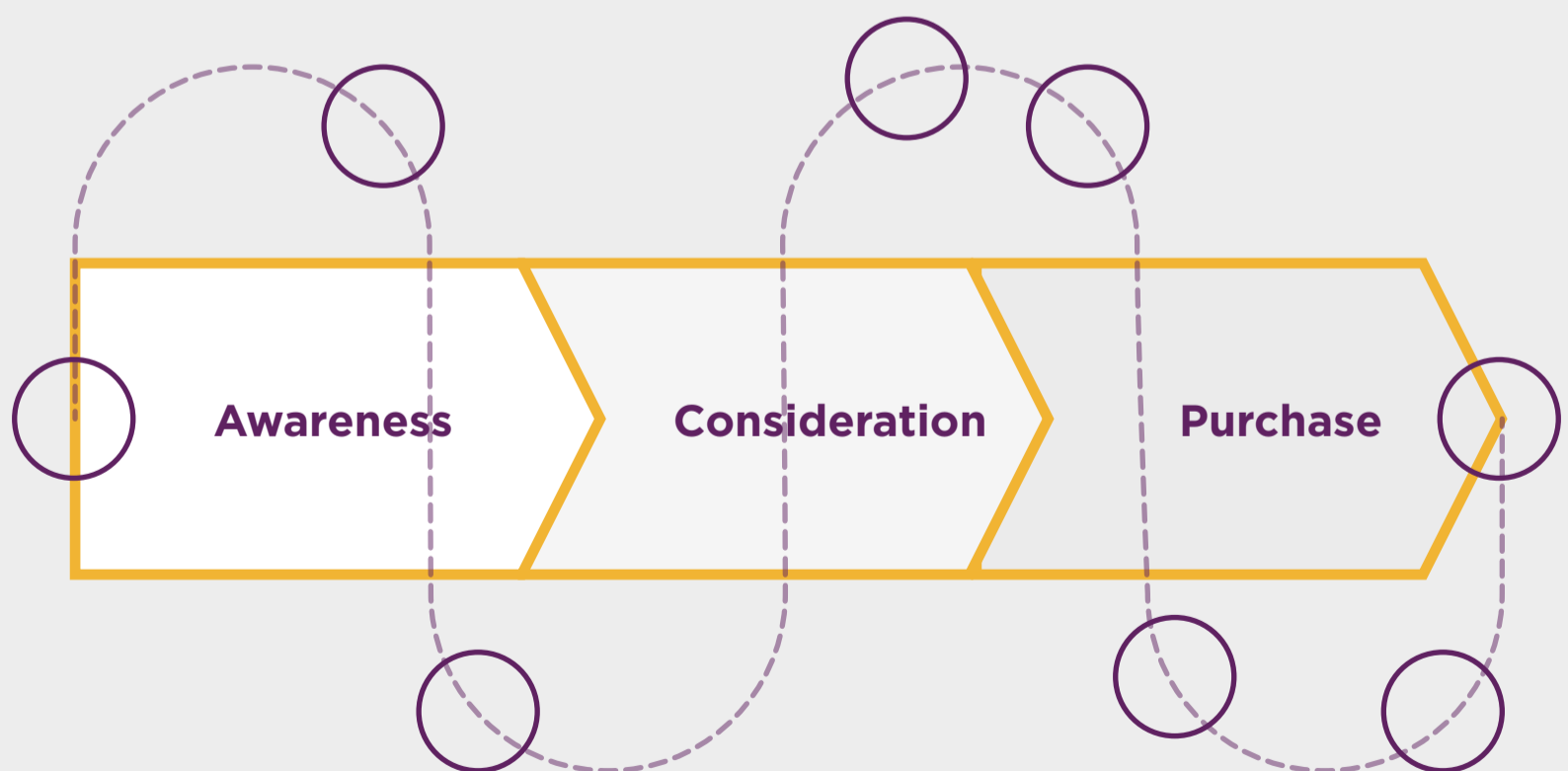
# What do we want to know?.

A brand's role in the digital world is to provide content to customers where they are. That means thinking about how brands more generally are considered at all stages of the buyer journey. For makeup that can be creating content around tips, or looks and trends, or providing information about how the makeup is made or tested, not just highly intent driven messaging around price, availability and delivery.

Therefore, quantitative data alone doesn't provide us with all the data required. A customer, digital or not, needs to be

compelled to visit stores. We need to understand how customers view brands vs their competition given the vast choice ecommerce provides to them. Why do consumers purchase from Boots rather than Superdrug? Maybelline rather than Max Factor? What makes the difference to consumers and how can brands use that data effectively?

By understanding how brands appear at all stages and understanding how they are performing, we can see which website can be said to be truly winning.



# Getting to the starting line ●

To get to a position to answer what it means to have a winning website, brands must establish an understanding of:

## Who their customers are, including:

- Where customers shop
- What's important to customers

## Who their competitors are, covering:

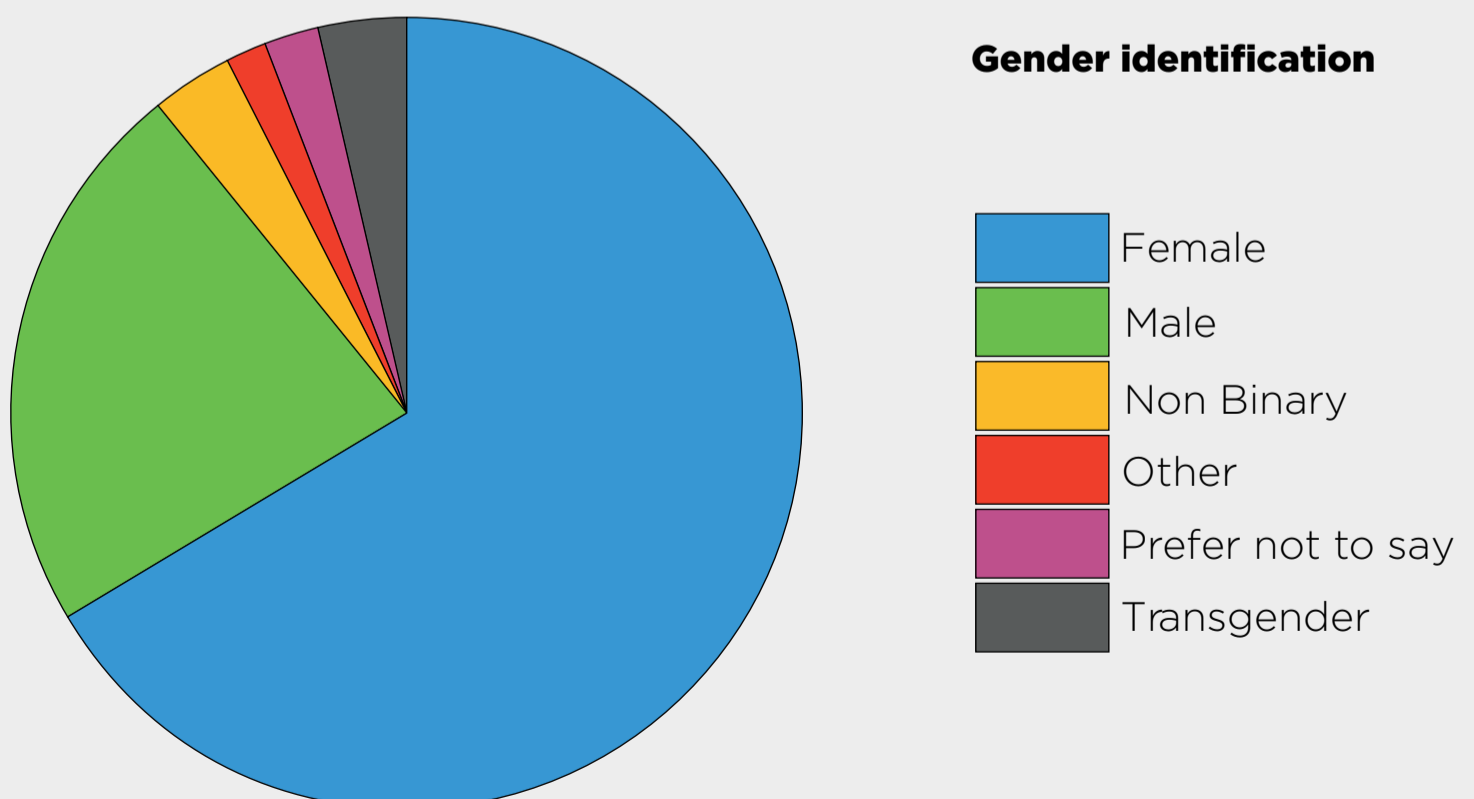
- Success
- Opportunities

In order to get a dataset, we surveyed 1,000 nationally representative general consumers, to gain some insight.

## Gender

We wanted to understand how make-up customers identify themselves.

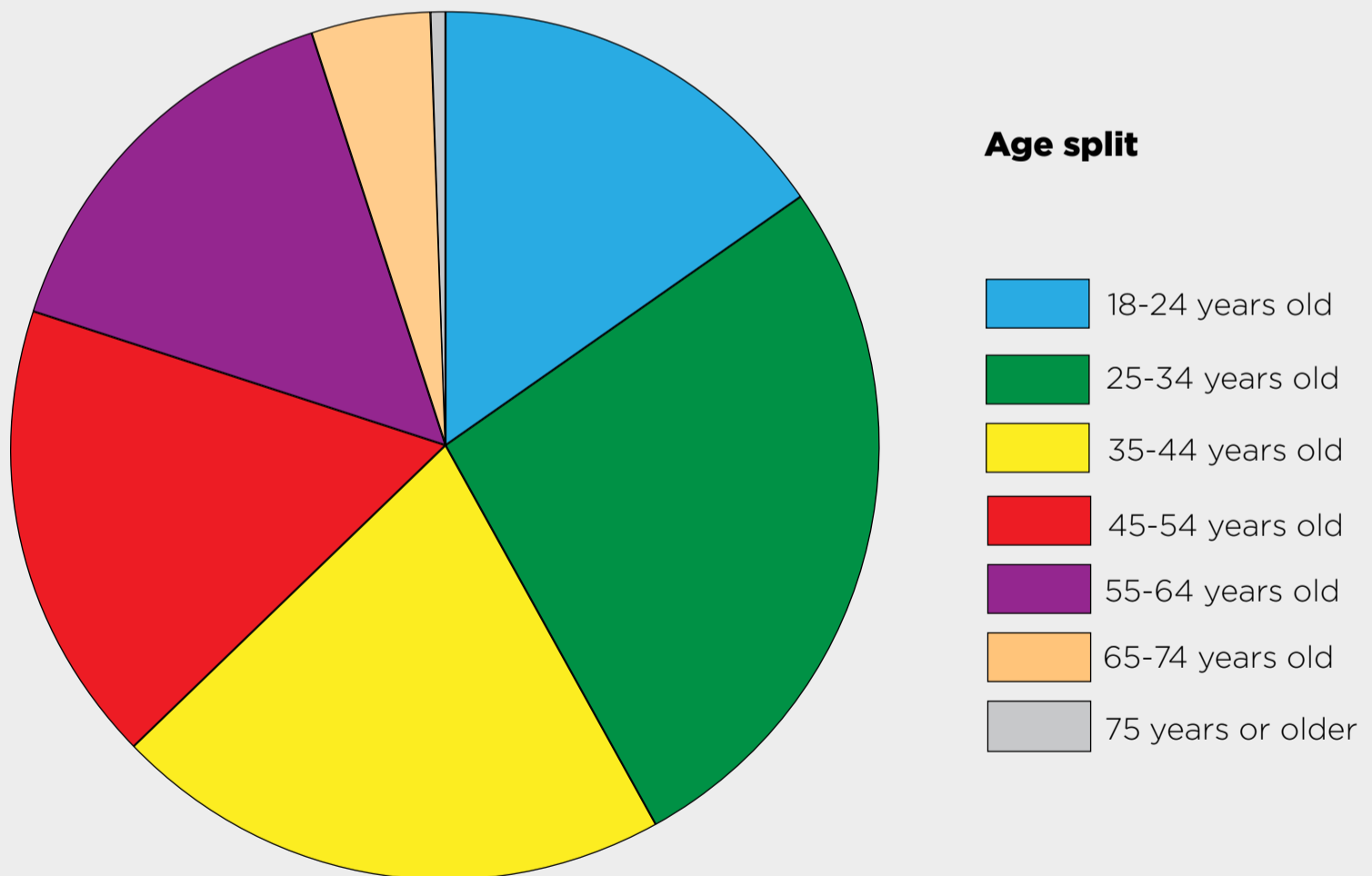
Unsurprisingly the majority of online makeup consumers are female. However, a third of all respondents identify themselves as non-female. This is important to consider when generating content. Brands need to avoid assumptions and engage authentically with their entire audience.



## Age split

When generating content, general consensus tells us that what engages 18-year-olds is unlikely to do the same with someone 45+. In makeup, this is particularly important as product needs vary depending on age (amongst other factors).

The data shows us that we have a good representation across a number of different age groups (25-24 | 35 - 44 | 45 -54) this provides with brands an opportunity to engage with a wide customer base. However, a conscious decision is required to ensure each age group is sufficiently engaged.





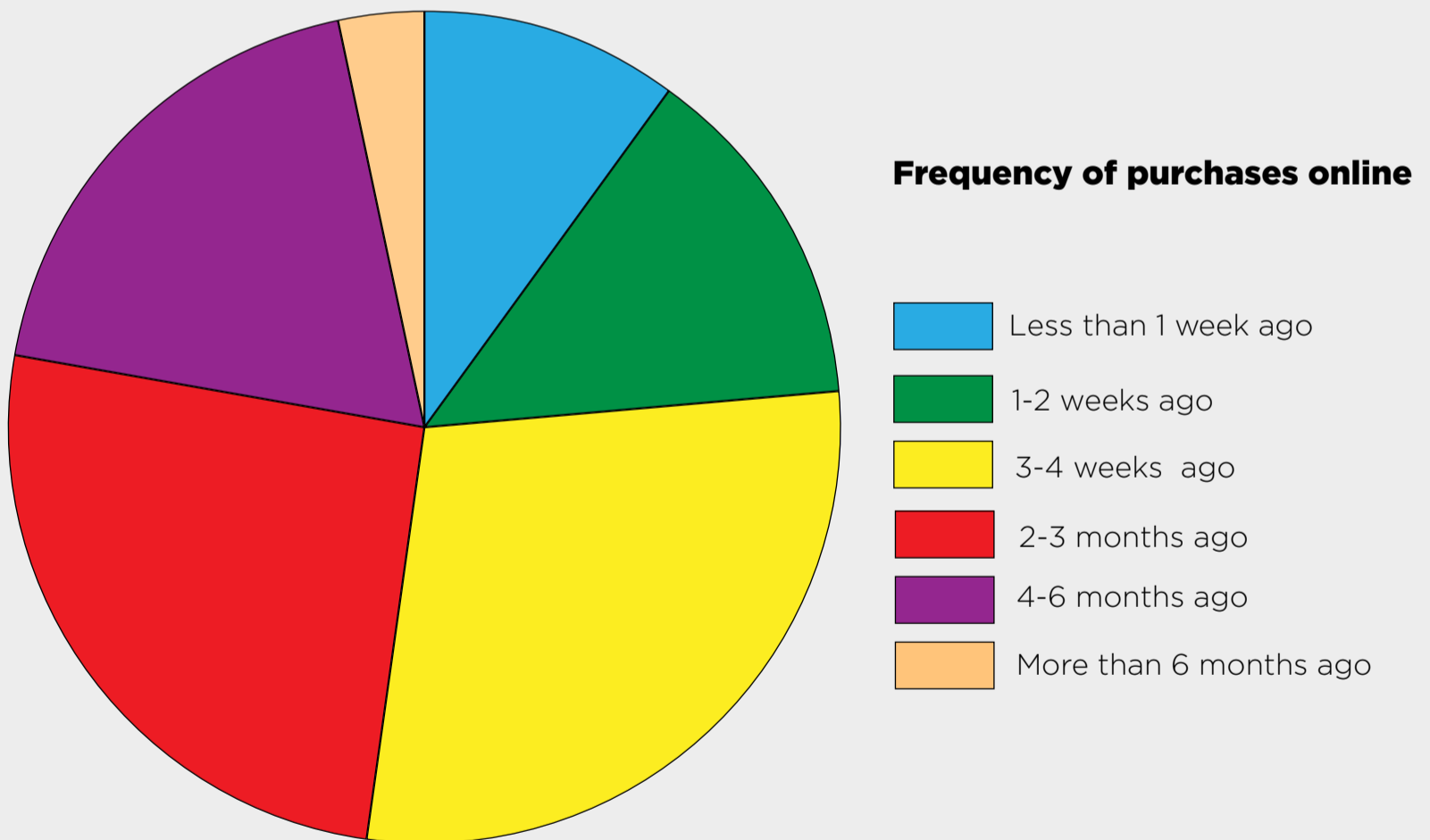
## When was your last online makeup purchase?

To understand frequency of purchase and desire for new makeup products we asked how often people shopped for makeup online.

The results revealed that most people who purchased makeup online did

so in the last 3 weeks to 3 months.

While this data may be exaggerated with the lack of access to stores due to the pandemic, this does paint a positive picture of a customer base that shops online frequently.



## Brand resonance

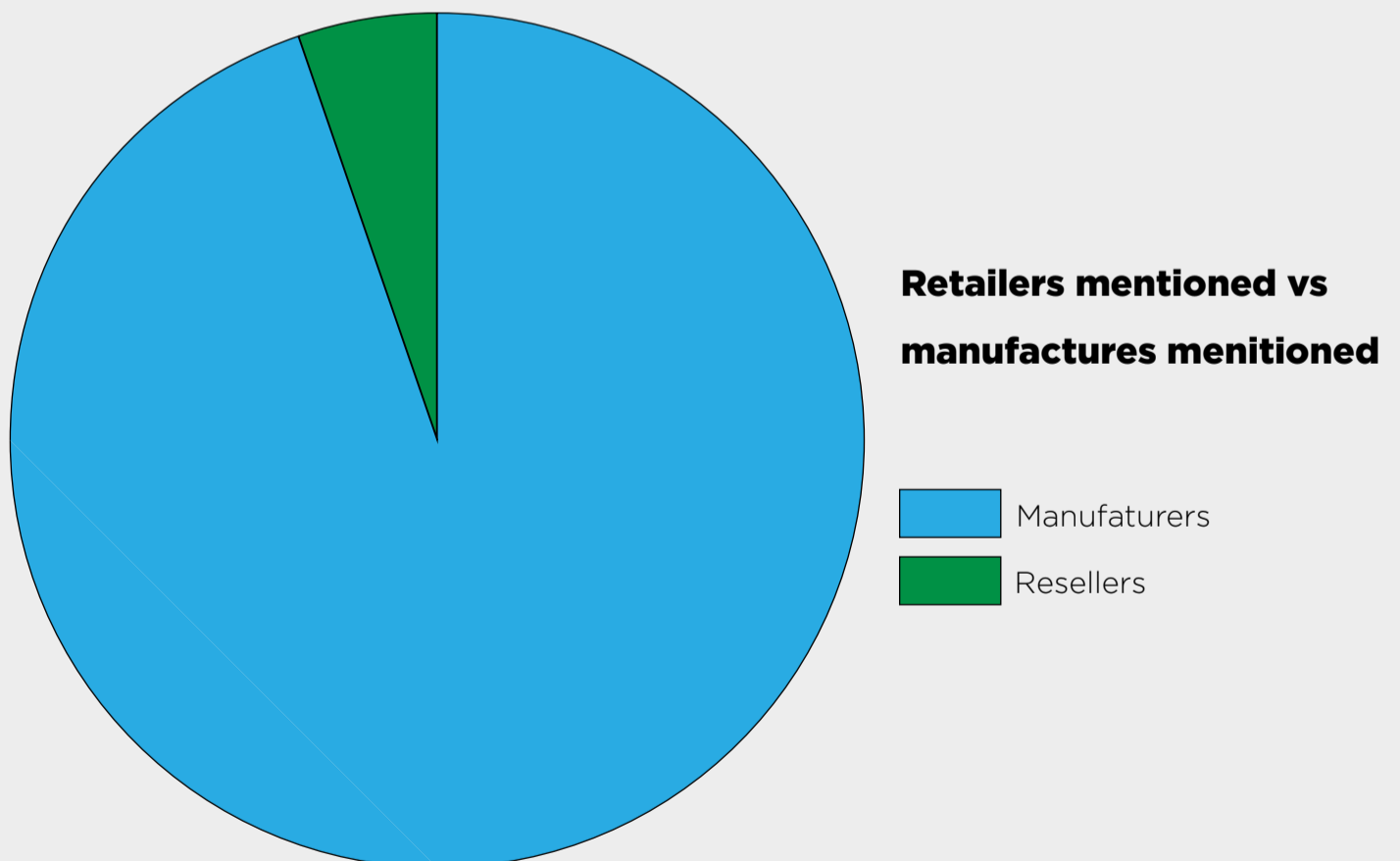
Brand recollection, both aided and unaided, is important because websites don't exist in a vacuum, nor does consumer search behaviour. Brand awareness and salience is vital to driving intent and purchase.

When we asked consumers to name brands that sell makeup online, the results showed a massive sway towards makeup manufacturers rather than resellers.

- Rimmel London 13.5%
- Maybelline 11.5%
- Max Factor 9.1%
- L'Oréal 8.9%
- MAC 6.3%

Meanwhile, Boots showed up with both its No7 brand and as a reseller.

- No7 - 9.5%
- Boots - 2.2%



## Research

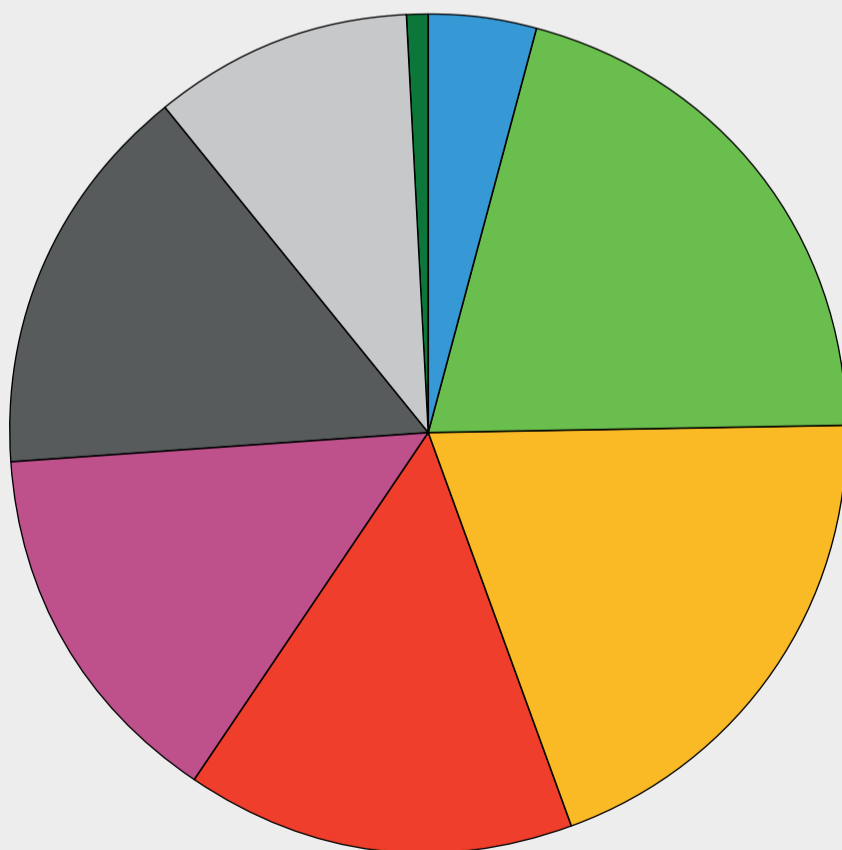
Finally, we wanted to understand where customers looked for content to inform their purchases.

Nearly all makeup consumers do some research online before purchasing.

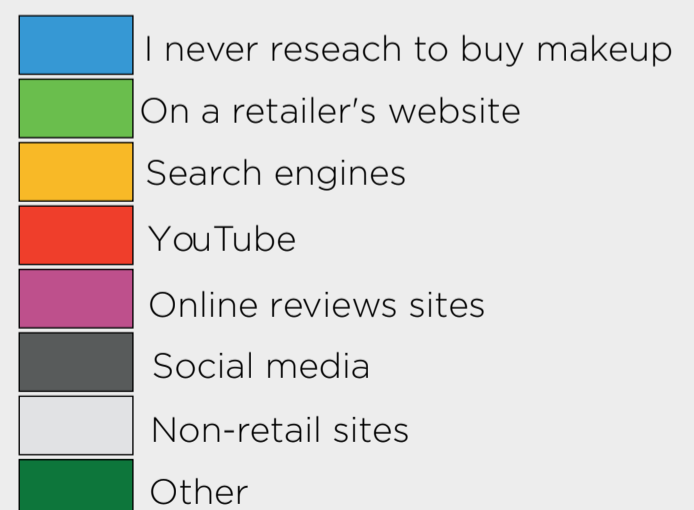
Retailers' websites and general Googling were the most popular methods. However, YouTube, online review sites, and social media are also massive channels. What this tells us is that it's not as simple

as creating a website with good products. Brands need to be visible when customers are deciding what to purchase, not just when they are in purchasing mode.

This means generating content which will help with purchase decisions online, as well as being visible on social media and YouTube.



**How consumers research**



# Getting comfortable with the data.

Developing a clear understanding on what it means to have a winning website should be grounded in data, both quantitative and qualitative as this will give insight into what is happening where and why.

It's essential for brands to exist where their audience is, with content that is relevant and engaging to them.

Getting to know your customers and who they see as players in the space allows you to benchmark against competitors, especially those that don't immediately spring to mind. Makeup brands should definitely be thinking about:

- **Rimmel London**
- **Maybelline**
- **Max Factor**
- **Boots**
- **The Body Shop**
- **Superdrug**
- **Debenhams**

The data gives us the opportunity to look at content and engagement across the website to see how and where our customers are looking for reassurance and support when shopping. To have a winning website we want to provide a winning experience for every customer - but we need to be really clear on these differences. While brands may have a good idea of their customers and their personas it is always smart to analyse this regularly and across the market.

# Getting comfortable with the data.

When using data focused on your brand and competitors, brands can generate personas similar to the below:

**Female | 25-34 years old | Living in London | Purchased makeup 2-3 months ago | Strong resonance with Boots and Superdrug | Always researches before purchasing online | Research is mainly via Google and rarely using YouTube.**

These high level personas help direct focus when reviewing how brands perform against quantifiable metrics and their competitors. With an idea of who your customers are and how they think and behave online, you have a starting point to begin deeper exploration.



# Diving into the data ●

We've talked about how in SEO, visibility and rankings don't go deep enough to really understand what it means to win in a category. One tool that provides an industry standard view of visibility is Sistrix.

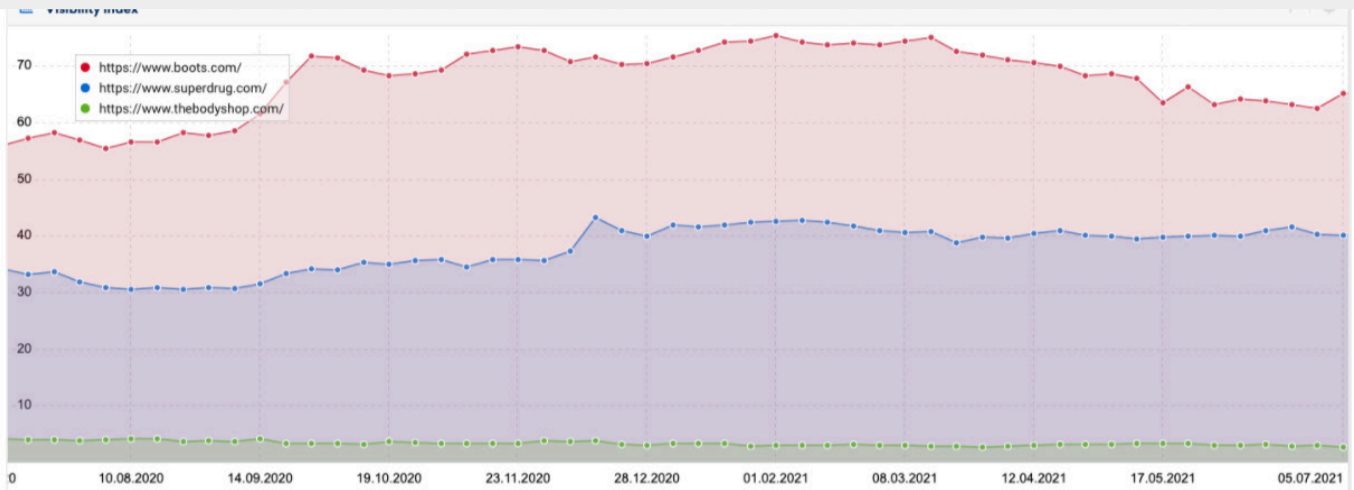
Sistrix provides a score depending on a site's ranking performance on a pool of around a million terms, and higher rankings for higher volume terms gives a site a higher mark. It can provide data

for an entire site, or drill down to specific areas of a site.

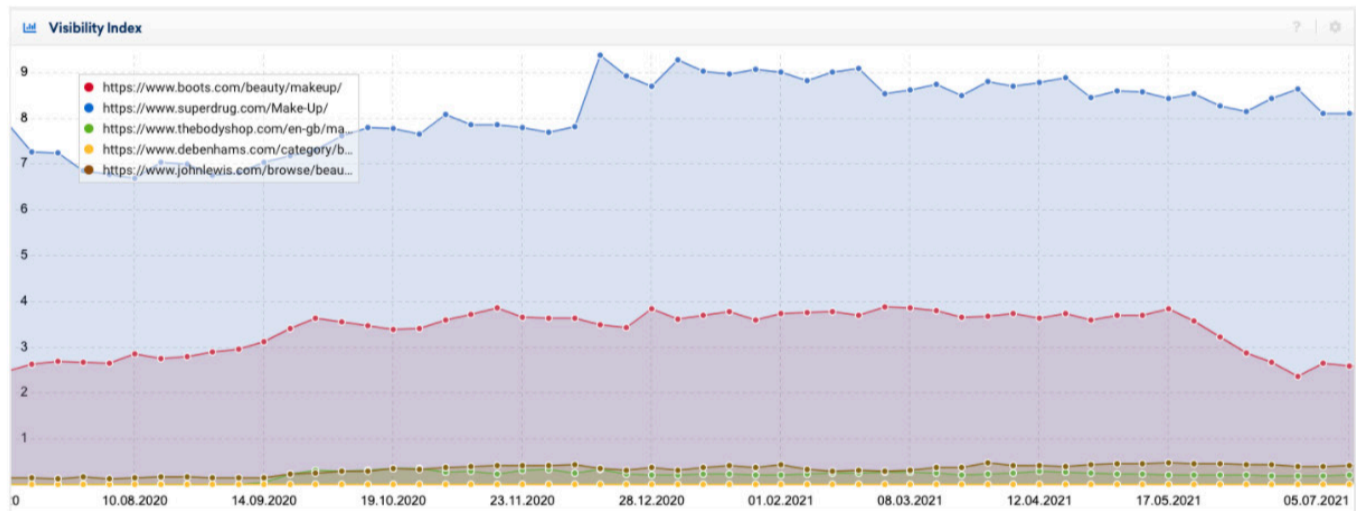
When looking at a domain level, brands can be seduced into thinking that one brand is winning out. However, this outlook is dangerous and hides a massive amount of detail on the true performance against competitors. Brands must understand the performance of the site on a category level or go deeper against the relevant competition.



# Diving into the data ●



Make up competitors domain



Make up competitors makeup section

This example shows Boots dominating when entire sites are compared; this is expected as the retailer offers more products. However, when we drill down to the specific makeup sections of the site it shows a very different story. Superdrug

is a much bigger player here, with a visibility score that's over 60% higher than Boots.

But visibility is just scratching the surface, so, let's go further.

# Digging deeper ●

To get an idea of site performance across the market, we used some tools to pull in ranking data for all the sites considered. There are a number of different options to get this data from tools such as Conductor, BrightEdge, and Corigan.

This data gives us:

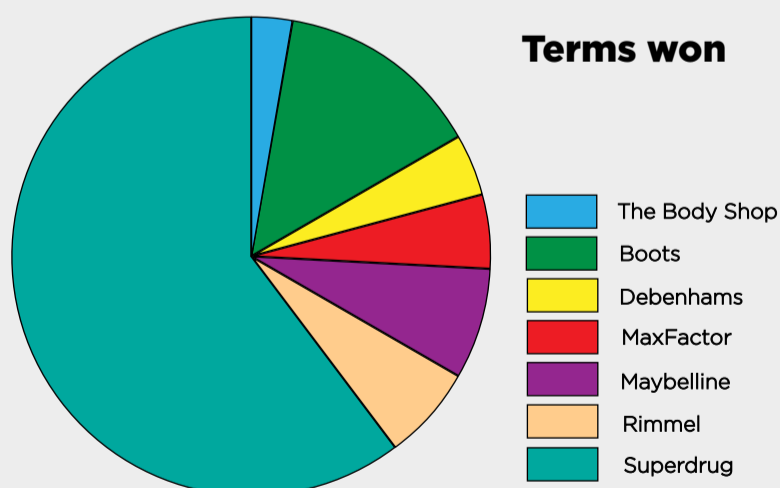
- Number of terms a site ranks for
- How sites perform against each other
- What opportunities are available

Using the dataset of all sites ranking information we get the following data.

## Top sites

Here we collate all terms and find who is ranking highest.

Similarly to the visibility graph, we can see that Superdrug reigns supreme, winning 60% of all terms available across all competitors. Manufacturer brands are showing up for less “won” terms, this is due to the limitations on their offering (only their own products) and reliance on brand terms. One thing to mention is the poor performance of The Body Shop: Less percentage won terms than all other competitors, coupled with only 2% unaided recall in the surveys should be a red flag for the team. While a prominent feature on the high street, The Body Shop risks being left behind in digital, something that was catastrophic for brands such as Toys “R” Us, Topshop, and many others.





# Digging deeper ●

To get into the weeds of the data, and to put this into real world context, we need to look into the traffic brands can expect from the terms they win.

In order to do this, we have used a process which analyses:

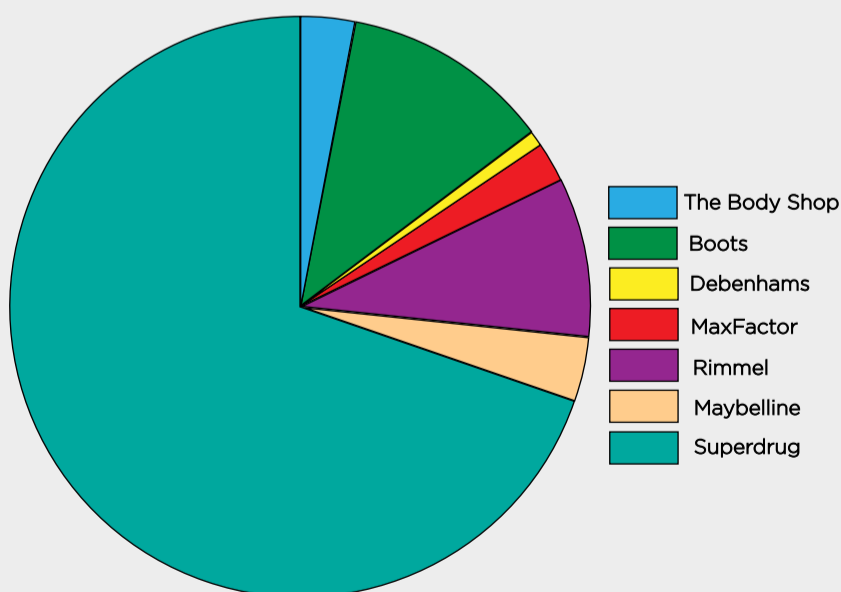
- **Rank**
- **Search Volume**
- **Calculated CTR**

This provides us with an estimate of actual traffic brands can expect, and allows us to give a good guess on the opportunity available to brands if they were to optimise these terms.

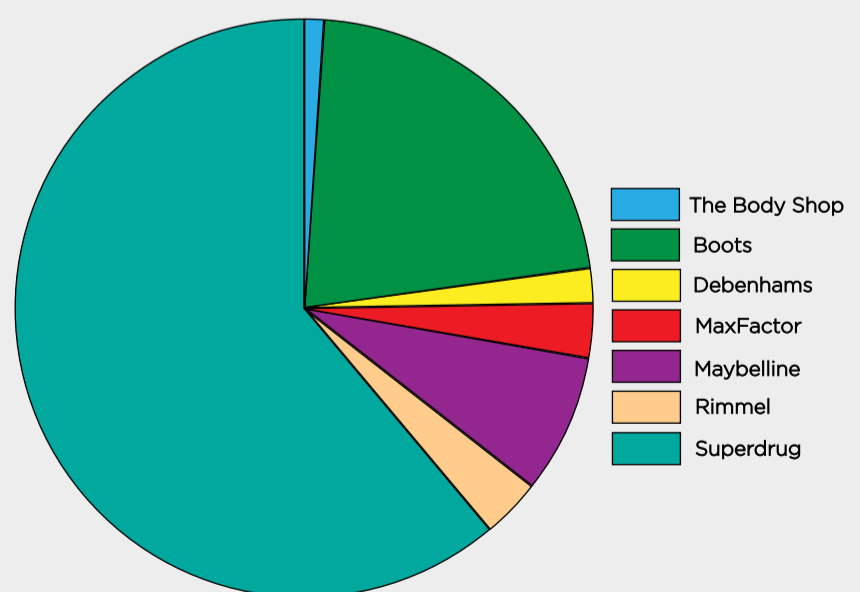
Here we can see that not only is Superdrug winning more terms, but it is also winning more valuable terms than the competition, while brands such as The Body Shop and Debenhams are struggling to compete on the volume of terms.

- **Superdrug - 69%**
- **Boots - 12%**
- **Maybelline - 9%**
- **Rimmel - 4%**
- **The Body Shop - 3%**
- **MaxFactor- 2%**

**Estimated current traffic**



**Estimated potential traffic**



# Digging deeper ●

When we factor in potential uplift in traffic, we can see, in the chart on the previous page, some positives emerging for Boots - a greater percentage of the pie for potential uplift with focused optimisation.

- **Superdrug - 61%**
- **Boots - 22%**

- **Maybelline - 8%**
- **Rimmel - 3%**
- **The Body Shop - 1%**
- **MaxFactor - 3%**

When adding these figures into a single table we can really see the dominance of Superdrug in the makeup market.

	The Body Shop	Boots	Debenhams	MaxFactor	Maybelline	Rimmel	Superdrug
<b>Total number of terms</b>	2,840	10,000	3,300	4,417	6,429	6,689	35,550
<b>Estimated Current Traffic Month</b>	64,334	225,312	15,580	47,768	170,850	73,851	1,359,510
<b>Estimated Annual increase</b>	40,739	714,359	63,852	96,952	257,125	110,957	2,010,728

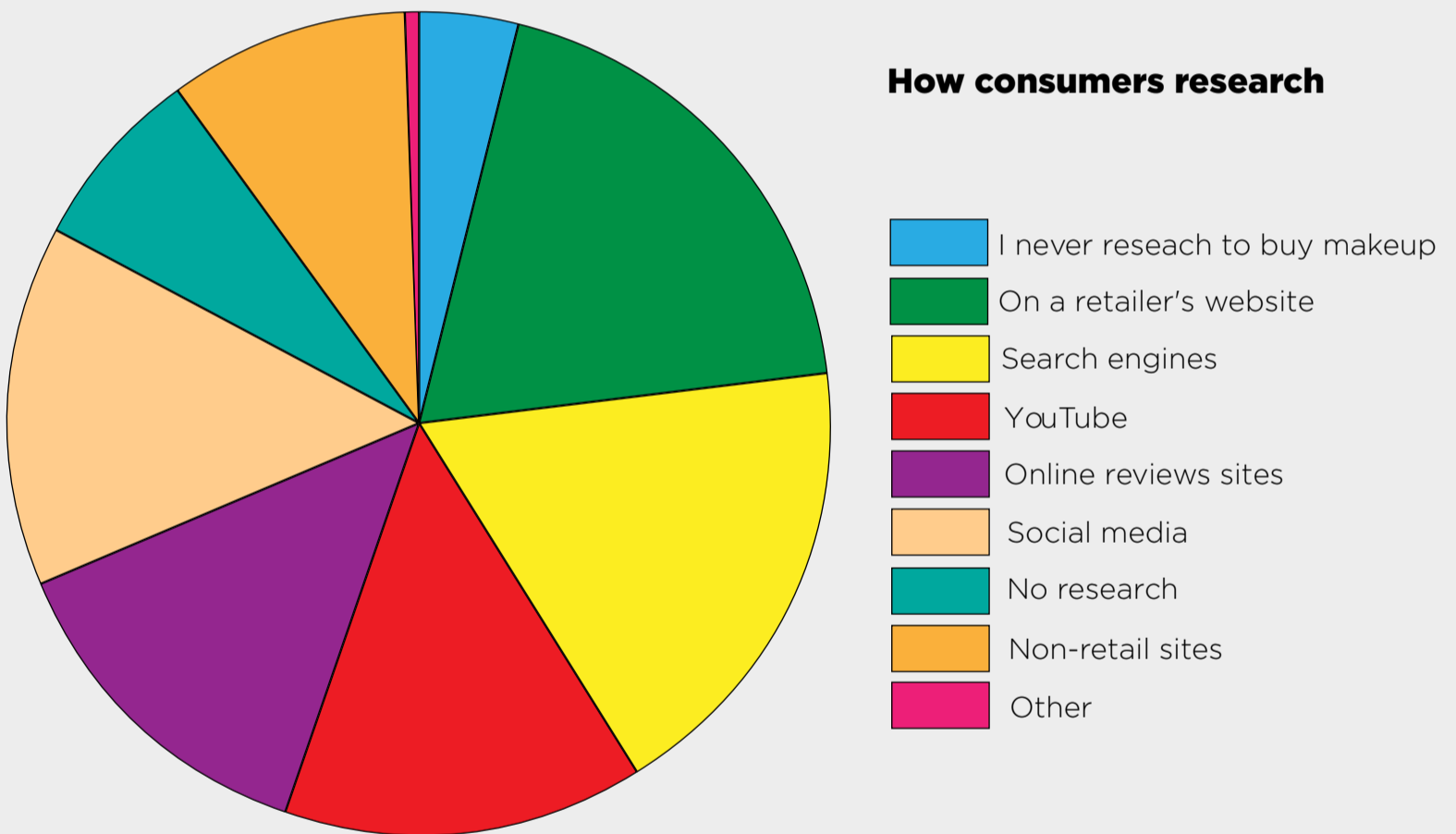
This view also shows us how powerful manufacturers are, performing in 3rd and 4th position in the sites we have compared. This echoes the data we found from the survey. When asked to name a place to purchase makeup online consumers mostly named

manufacturers not retailers, with 470 mentions of manufacturers, and only 25 mentions of resellers. This really highlights the need for this level of understanding and appreciation of each vertical to know how and where people look online.

# Being where your customers are ●

Our research results told us that when looking for new makeup, 37% of shoppers rely on content from retailers to help make an informed decision on which products to purchase. While social media

and YouTube (both 14% respectively) are also very important, having onsite content which is visible in this stage of the buying process is vital to win customers.

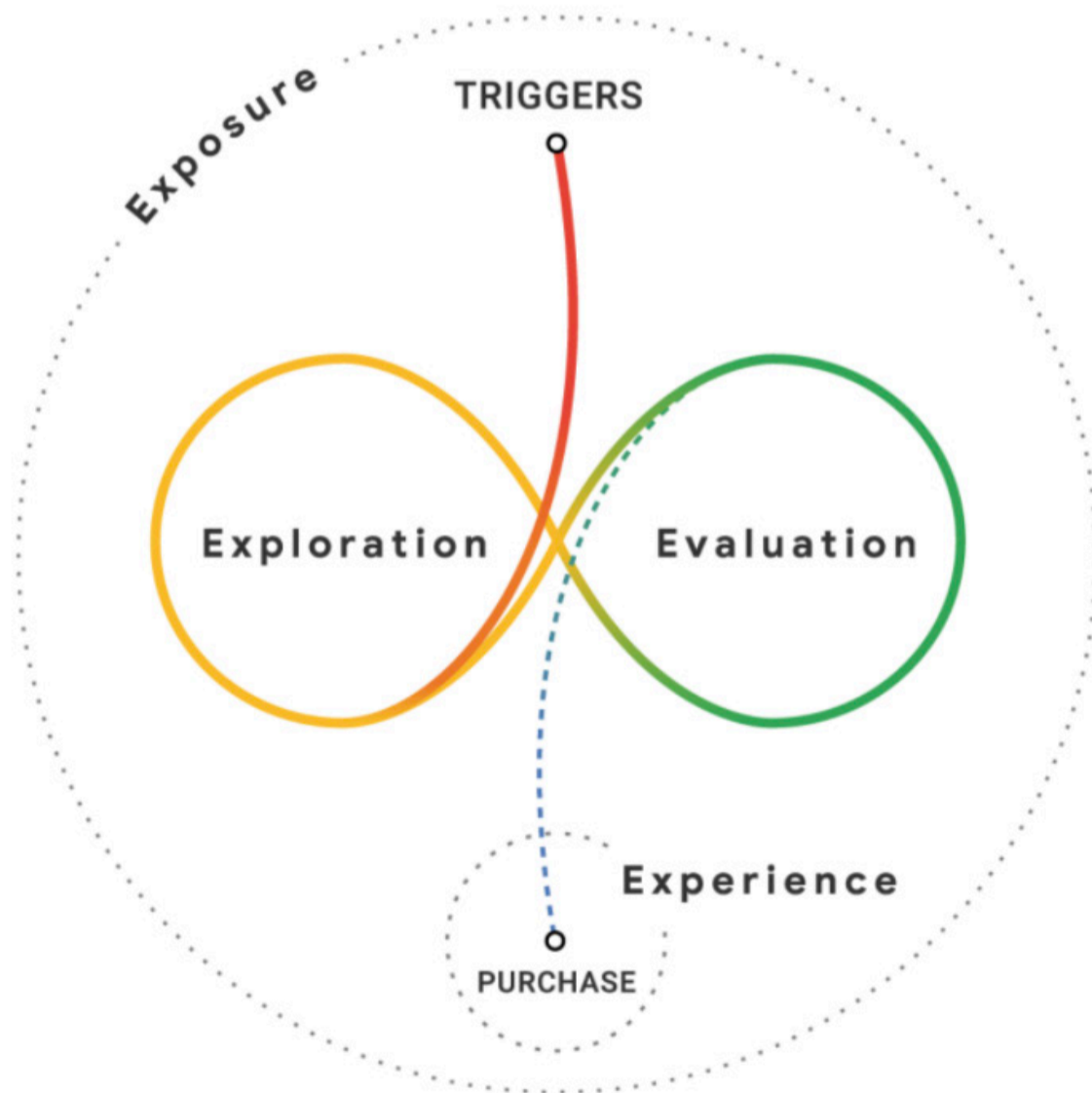


# Being where your customers are ●

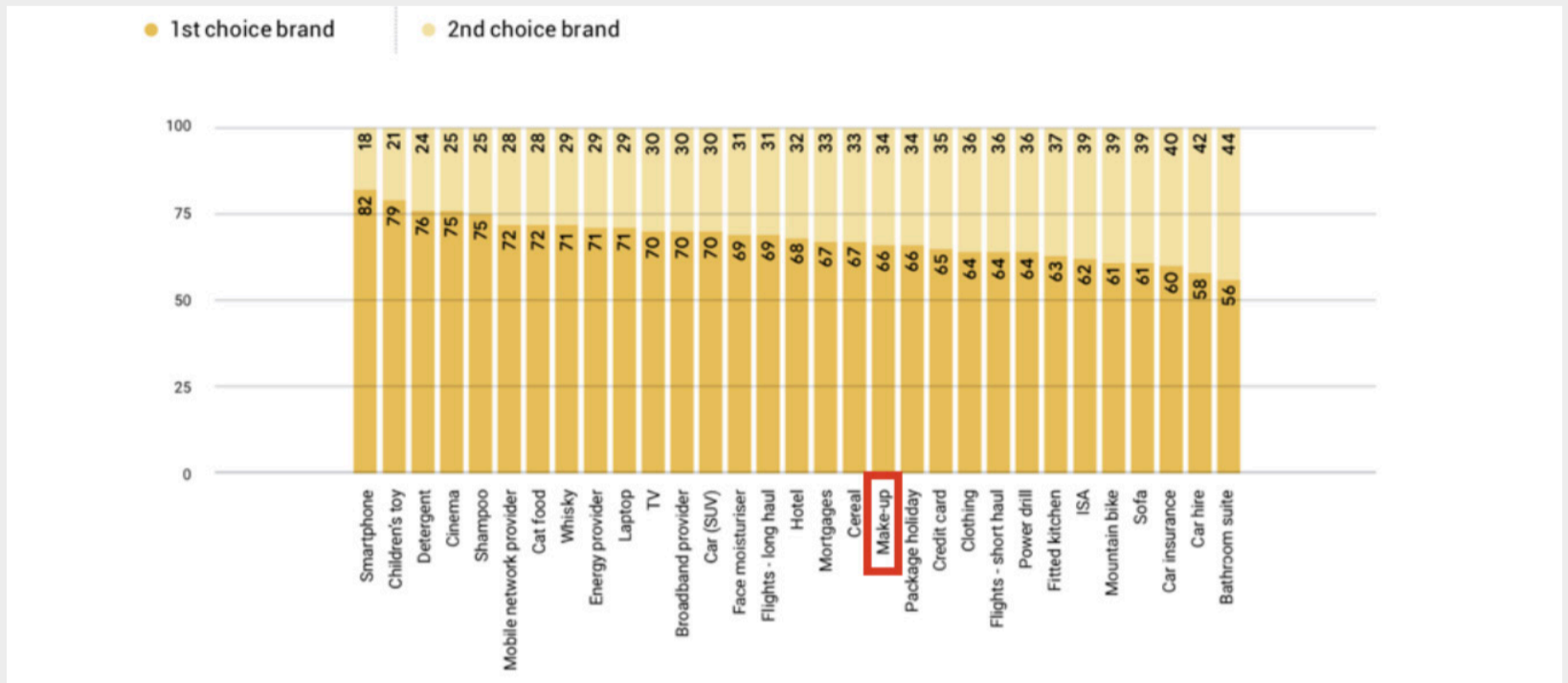
Google's 'Messy Middle' framework gives a lens on the modern path to purchase. It's more complicated than a simple linear funnel. To be successful we want to be present at every stage of the journey.

Research carried out by Google and The Behavioural Architects has shown that simply being present in the middle stages

of the buyer journey can be enough to sway buyers away from their initial preference. It gives license for consumers to really review their choices, and for makeup in particular, can convert up to 34% of consumers from their first choice brand to your brand.



# Being where your customers are ●



When looking at the terms ranking for the brands, early-stage terms account for low percentages of estimated traffic (1-3%).

This may be due to the fact that the areas of the sites analysed have a sharper, more intent-driven focus for people looking to buy something. But for the manufacturer brands, where the entire site was analysed, this is a concern. While a lot of the top and middle funnel content is more than likely a focus for social,

the data does show that consumers look to Google/brand websites to get this information.

So, to have a winning website, brands need to know how and when to talk to their customers and provide content which talks to them, turning browsers and researchers into buyers.

# Position zero ●

Outside of the natural search results, we also wanted to review the opportunity for position zero results.

These include:

- **Answer boxes**
- **Images**
- **Local**
- **'People also ask'**
- **Video**

At first look, it appears that there is a rich vein of opportunity here. But when we look at the percentage of the available positions which have been won, it paints a different picture.

	The Body Shop	Boots	Debenhams	MaxFactor	Maybelline	Rimmel	Superdrug
Image won	16%	2%	1%	6%	9%	12%	13%
Local won	1%	4%	0%	0%	0%	0%	2%
People also ask	7%	1%	1%	2%	3%	4%	4%
Video won	0%	0%	0%	0%	0%	0%	0%

# Position zero ●

Outside the poor performance on the search listings, The Body Shop hits back with some impressive performance in position zero results.

- **Top vs competitors image won**
- **Top vs competitors “people always asked won”**

This tells us that out of the terms ranking - The Body Shop is ranking better for position zero results. However, these results are all still low, with the opportunity taken mainly by forums, news/media sites and influencers.

This tells us that the opportunity for makeup brands is not in position zero for the site themselves. Brands should look at these results and aim for partnerships/sponsorships as a first step.

Knowing what we can win is important. But with any brand, resource is scarce, so knowing what you're not going to win is also vital to avoid wasted effort. Brands need to be smart with what they focus on, as it's impossible to optimise everything all the time.

# So, what does all this mean? ●

Our aim here was to answer, ‘what it means to have a winning website’. Without knowing this, it is hard to develop an effective digital strategy that will deliver results.

These same principles can be applied by any brand in any sector and category. Outside of the specific recommendations and category nuances, winning can be boiled down to 5 pillars of activity.

## Understand your market

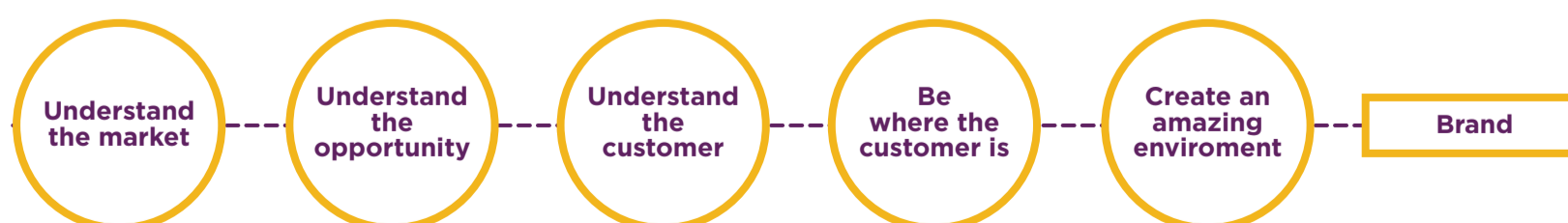
Know who you are competing against, and this may be a different list of competitors to who you initially think about. It is vital to really understand who it is you are competing against. You need to use this knowledge to develop effective strategies and target terms that will make a difference to you and your customers.

## Understand the opportunity

After finding out who your competition is, you need to understand what the opportunity is, how you perform, and where to put your resources. To win in any category, brands must beat your competition on high-value terms. You also need to be sure of where you are not going to win. Partnerships/collaborations which make sense to you and your customers should be used in the spaces where maximum impact can be achieved for your effort/money.

## Understand the customer

Know what your customers want, how they think, their journey, and how they view your brands. Using this information will allow you to develop your digital strategy to meet your customers and their needs better.





# So, what does all this mean? ●

## **Be where the customer is**

This is about being there throughout the purchase funnel, providing important and interesting content to help consumers along the way. Being visible in the middle stages of a funnel can dramatically affect your chances of winning a customer for the better.

## **Create an amazing environment**

Brands need to help customers find what they need on their site. This means really reviewing what they want to do and ensuring that the site does it as effectively as possible.

So, to have a winning website means more than having the highest domain level visibility. You must know who your customers and competitors are for each of your verticals. You must know how you

perform against customer needs and competitor pages. Be smart with your resources, fight battles that the brand can win.

To get to this position, brands should evaluate every level of their site to understand their strengths and lean on them, as well as analyse their weaknesses and turn them into strengths. Those that do will win. Those that don't will be left behind.

Want to assess how your website is performing against your competitors, and create a winning digital presence?

Get in touch on **[jessica@theorganicagency.com](mailto:jessica@theorganicagency.com)** or visit **[www.theorganicagency.com](http://www.theorganicagency.com)** to see how we help other brands succeed online.

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