

65% of all trackable website traffic comes from search

Organic Search remains the dominant source of trackable web traffic and in a nearly unassailably dominant position as a channel

BRIGHTEDGE

The Global Leader in Enterprise
SEO and Content Performance

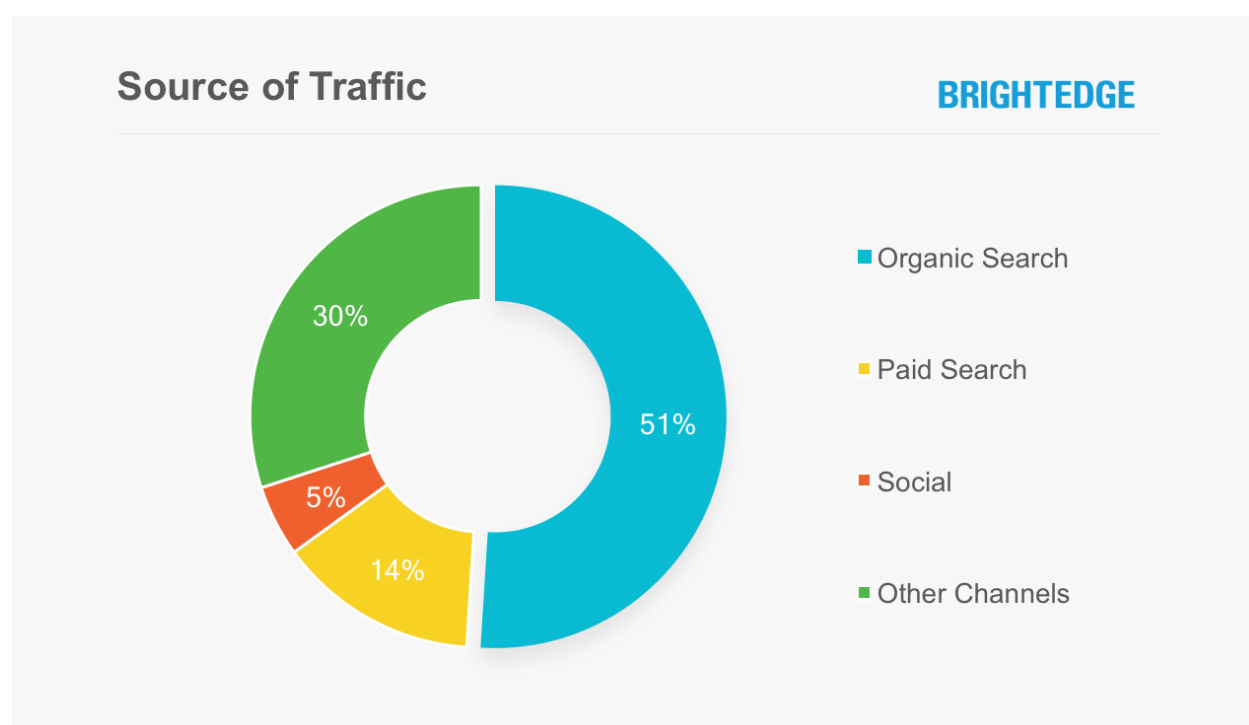
989 E. Hillsdale Blvd, Suite 300,
Foster City, CA 94404
tel: 800.578.8023 | info@brightedge.com

www.brightedge.com

Introduction

New BrightEdge Research unveiled findings on the performance of Organic and Paid Search as a marketing channel. The strength of search marketing - Organic Search and Paid Search - is clear.

BrightEdge Research found that Organic and Paid Search dominate websites' traffic in 2017 - 65% of all trackable website traffic is sourced from Organic and Paid Search, vastly exceeding all other channels, including Social Media. The Organic Search figure at 51% is consistent with 2014 findings, the first year that BrightEdge Research conducted the analysis, but the Paid Search proportion increased from 9% to 14% or a 55% jump.



Organic continues to dominate

Organic Search remains the dominant source of trackable web traffic and in a nearly unassailably dominant position as a channel. Paid Search continues to grow. Social Media, driven by the rise of Facebook, Twitter, and Instagram, garners significant mindshare and attention but contributes on average $1/3$ as much traffic as Paid Search and just $1/10$ as much as Organic Search.

Despite several seismic shifts in consumer behavior, the rise of mobile search, and the dramatic changes to the Search Engine Results Page (SERP) layouts, including Local 3-

Pack, Knowledge Graphs, and Quick Answers, which push more organic searches below the fold, Organic Search is dominant.

Recently released BrightEdge Research confirms the powerful and continuing trend towards mobile with mobile and tablet searches representing an average of 57% of all site traffic. The shift towards mobile disrupts the traditional buyer's journey by highlighting new opportunities to answer questions faster, buy easier, and find physically proximate resources.

BrightEdge Research is releasing segmented channel performance across 9 key industries. Key findings from the research include:

- The Organic Share ranges from 31% to 71% across the 9 industries. Some industries relied more on Paid Search also saw lower share of Organic Search traffic but Organic remains larger in absolute terms.
- Despite the visibility and popularity Social share was the same as 2014 at 5%, It was highest at 8% in the Media & Entertainment segment due to their volume of published content, experience in content distribution, and the intrinsic shareability of breaking news and topical interest in current entertainment.

| Organic search across B2B, B2C and Non-Profit

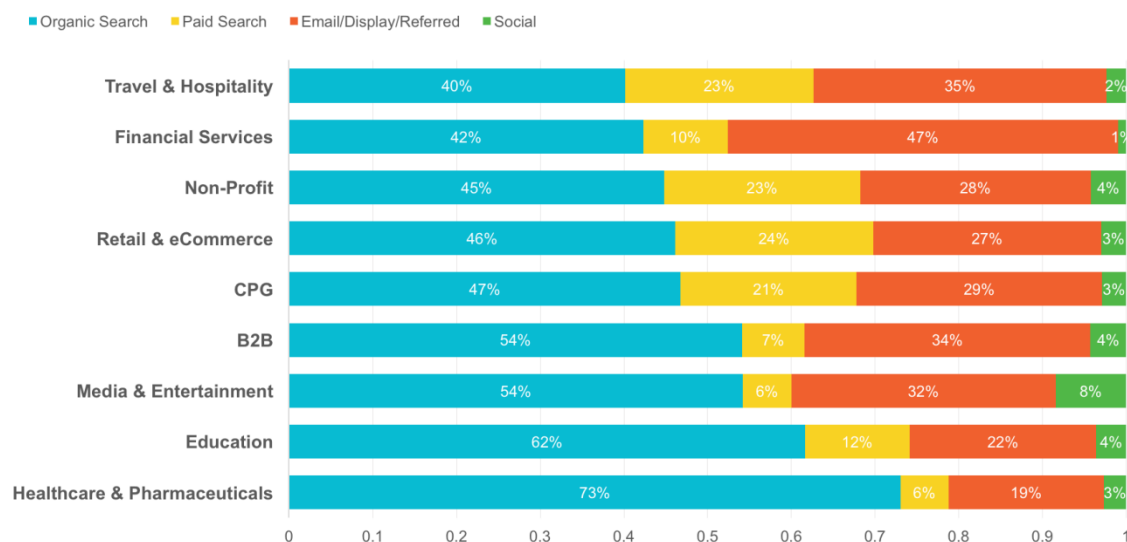
BrightEdge Research examined differences across B2B, B2C and Non-Profit where some differences in traffic patterns emerged. Below are the top 2 findings;

- Non-Profit used the highest proportion of Paid at 24% which is 3.5 times higher than B2B at 7% with B2C at 14%.
- Nonprofit showed a smaller % of Organic Search at 41% vs 52% for B2B and B2C.

Channel share within industries

Channel Share by Industry Vertical

BRIGHTEDGE



- Healthcare & Pharmaceutical vertical had the highest proportion of Organic at **73%** due in part to less use of Paid Search and Other channels, including email. Organic Search may also be high due to a heavy use of offline paid media and the marketing of new products with unestablished brand names.
- Travel & Hospitality had high use of Paid Search at **23%** but Organic was still the largest channel **40%**.
- Financial Services had the lowest share in Social at **1%** and the highest share in Other at **47%**, which includes email.
- Retail & Ecommerce had the highest share of Paid at **24%**.
- Education showed a substantial proportion of Organic at **62%**.
- Software companies had a much smaller share of organic than the overall average and within B2B, suggesting a heavier reliance on Paid Search advertising.

Channel Share by Industry Vertical Table**BRIGHTEDGE**

Industry	Organic Search	Paid Search	Email/Display/Referred	Social
Healthcare & Pharmaceuticals	73%	6%	19%	3%
Education	62%	12%	22%	4%
Media & Entertainment	54%	6%	32%	8%
B2B	54%	7%	34%	4%
CPG	47%	21%	29%	3%
Retail & e-Commerce	46%	24%	27%	3%
Non-Profit	45%	23%	28%	4%
Financial Services	42%	10%	47%	1%
Travel & Hospitality	40%	23%	35%	2%
Grand Total	51%	14%	30%	5%

I Organic search within B2C and B2B sub-verticals

In B2C, the differences became more apparent in key sub-verticals. For example,

- CPG Home Goods showed above average Organic Search at **59%** and far above average Social share at **12%**.
- The Legal sub-vertical showed a robust **77%** in Organic Search, likely due to the restrictions on digital Paid media which came in at the lowest at **2%**.
- Manufacturing showed a high percent of Organic at **65%** possibly due to the large catalog of products that form a long-tail of content for their sites.

I What does this mean for marketers?

Organic and Paid Search continues to dominate website traffic for nearly every industry. However, more and more changes in the search landscape are on the horizon that will impact organic traffic if marketers are not prepared. Marketers will need a full suite of technology to stay ahead of those changes in the marketplace.

Below are some of the major changes the marketers must prepare for in the coming months.

- **SERPs, Visibility, and Keyword Prioritization.** As SERP layouts evolves, marketers must understand the relationship between position, visibility, and traffic. Choosing the right keywords relative to the range of SERP layouts becomes more important than ever.

- **HTTPS.** Google is requiring sites use HTTPS for secure data. For websites that have not made the migration, The Google Chrome browser will show an insecure notice on pages that have forms.
- **AMP.** Accelerated Mobile Pages will be featured in an expanding number of search queries. Recent research is also finding that AMP-enabled pages outrank non-AMP pages even when the results are not displayed in an AMP carousel.
- **Smarter Content.** Companies need to focus on content that is 1) Discoverable, 2) Optimized, 3) Measurable and Profitable.
- **Establish the Baseline.** Every organization must have a single system of reporting for the organic search channel.
- **Access to the Best Data.** SEO requires rich, relevant data. Without it, marketers will be unable to keep pace with changes in the market, consumer presences and competitive pressures.

How and when the was data obtained

BrightEdge Research sourced the data in September 2017 from thousands of domains and tens of billions of sessions to develop these findings. BrightEdge excludes Direct traffic from the analysis because as a channel it is primarily influenced by and derivative of other channels. The “Other” channel covers Display, Email, and Referred traffic.

About BrightEdge

BrightEdge, the global leader in enterprise organic search and content performance, empowers marketers to transform online content into business results such as traffic, conversions, and revenue. The BrightEdge S3 platform is powered by a sophisticated deep learning engine and is the only company capable of web wide, real-time measurement of content engagement across all digital channels, including search, social, and mobile. BrightEdge’s 1,500+ customers include global brands such as 3M, Microsoft, and Nike, as well as 57 of the Fortune 100. The company has eight offices worldwide and is headquartered in Foster City, California.