
A Click Consult whitepaper

The Changing Online Consumer Landscape

What's happening, why, and what to do about it



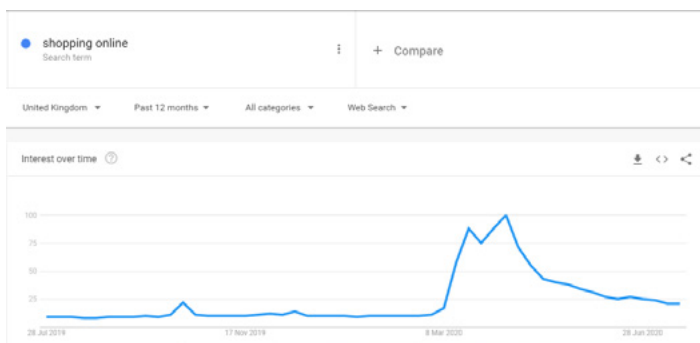
Contents

Introduction	3
Potential impact	5
Keyword importance	5
Why this matters.....	6
Actions you can take.....	6
Demographics	7
Why this matters.....	7
Actions you can take.....	8
Ecommerce	8
Why this matters.....	9
Actions you can take.....	9
SEO tactics and strategies	10
Why this matters.....	10
Actions you can take.....	11
Conclusion	11

Introduction

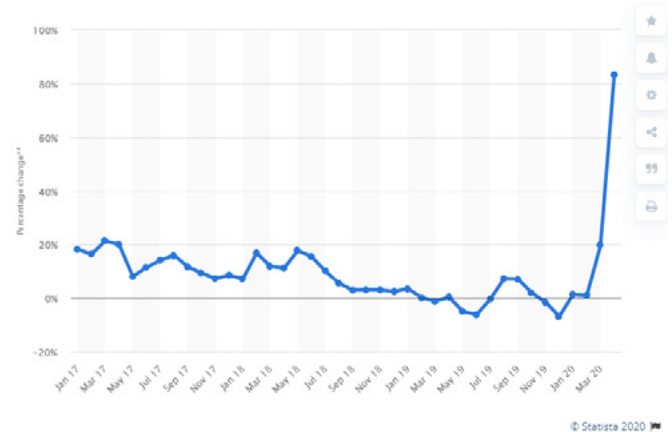
There has been a lot of hyperbole around the pandemic and its potential impact on the way we live, work and shop – from the death of the office to the death of the handshake; we’ve been bombarded with various extreme predictions. One thing that has changed this year, however, is how we interact with the internet – with even the Financial Times [joining the chorus of voices claiming that broadband access is a human right](#).

The New York Times [published a story covering this shift back in April](#) – with internet use boosted anywhere from 70 to 100% depending on the source, it is no wonder that there has been significant uplift for many digital brands. With the pandemic unlikely to see a vaccine for 12-18 months, the questions for brands must be: which of the trends are short term, which trends can we expect to see continue post-pandemic and what permanent behavioural changes will the pandemic have wrought?



The above, from Google Trends, for example, shows a peak in the UK for the term ‘shopping online’ when it became clear to most that Covid-19 was more than just another variation of the H1N1 scare, and the peak remains high through to and just past the announcement of a nationwide lockdown. Of course, there are only so many times a person needs to make this search – and as we would expect, the trend tapers and seems likely to return to normal levels as lockdown eases.

Whether we see another peak during the likely winter lockdown remains to be seen, but what will be most interesting is whether or how much those that made this search are persuaded by the service to change their behaviour and how many have and will return to do their in store shop.

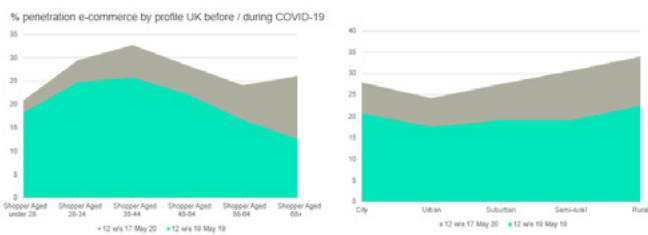


While online food sales increased more than 80% this year over the same period the previous year, it is unlikely that it will maintain that level in 2021/22. Yet, how soon will the trend stabilise? [New research from Rakuten](#), for example, showed that 87% of shoppers will still be shopping online for Christmas, while more than half (57%) expect to do so on key days like Black Friday.

In fact, [according to Econsultancy](#), around 75% of consumers surveyed planned to shop primarily online during the holiday period while [Wunderman Thompson Commerce](#) reported that Amazon have increased their share of the eCommerce market from 30 to 35% since the beginning of the year.

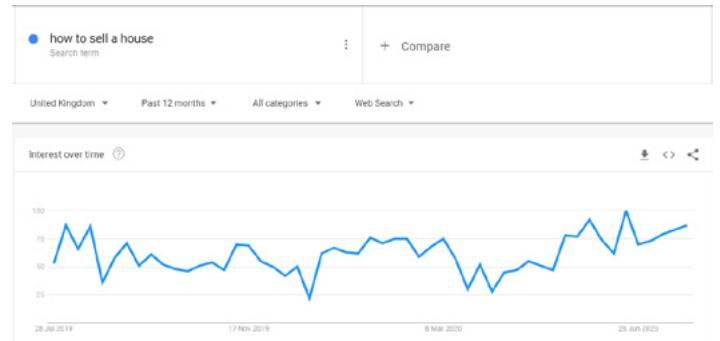
There are, obviously, numerous reasons for these statistics, but one of the more interesting (though, predictable in retrospect) has been the tremendous growth in eCommerce in the 65+ age group. We say it should have been predictable because, of course, regardless of age, there is a core aspect of shopping which is necessary and, with few other options, this demographic has begun to shop online – often for the first time.

E-commerce grows in all demographics but particularly in +65 yo



KANTAR Source: Kantar 13

In the final point we'll make in this introduction is, like the above, more in keeping with the law of unintended consequences – though just as the above trend could have potentially been predicted, the next one also seems obvious in retrospect.



As you can see from the above – it has not taken too long in lockdown for people to begin considering if their homes are where they want to be. This, combined with a growing desire in some sectors for a full move to working from home is making it feasible to move away from busy urban areas and the commutes that have always been necessary – and this [seems to be borne out by Rightmove](#), which has reported a growing interest in properties further from city centres and especially those with gardens.

All of this goes some way to giving you an indication of the reason for this whitepaper. While we have a vested interest, as a search and digital marketing agency, in amplifying the positive trends in online business, it is also our responsibility to properly investigate trends and extrapolate from them in order to provide the best strategies for the brands we work with.

Potential impact

As with anything you'll read based on inference, the following is educated guesswork – but what we'll try to do is offer as much contextualising information as we have available. While predicting the future is impossible, we have to consider that the prevailing forces in economics (and therefore in business) are for the status quo. While digital has been myth making about disruption for decades, it is subject to the same pressures and trend to monopoly.

- from: Mark Zuckerberg (redacted), Mark Zuckerberg (redacted), Mark Zuckerberg (redacted)
- to: David Ebersman (redacted), Mark Zuckerberg (redacted)
- time: Mon Feb 27 23:41:03 PST 2012 (1330414863647)
- subject: null
- body

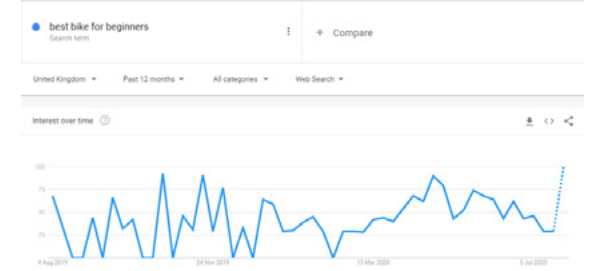
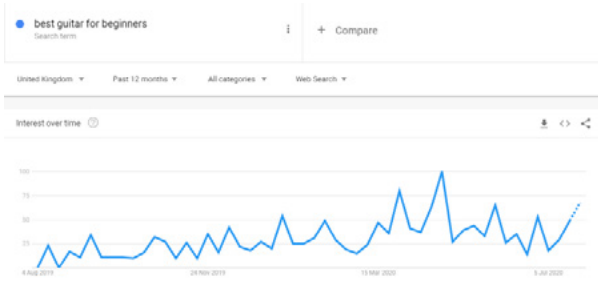
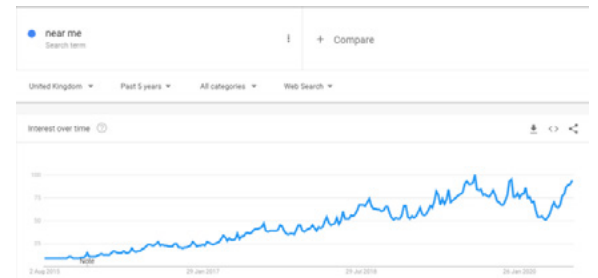
One business questions I've been thinking about recently is how much we should be willing to pay to acquire mobile app companies like Instagram and Path that are building networks that are competitive with our own. These companies have the properties where they have millions of users (up to about 20m at the moment for Instagram), fast growth, a small team (10-25 employees) and no revenue. The businesses are nascent but the networks are established, the brands are already meaningful and if they grow to a large scale they could be very disruptive to us. These entrepreneurs don't want to sell (largely inspired our success), but at a high enough price -- like \$500m or \$1b -- they'd have to consider it. Given that we think our own valuation is fairly aggressive right now and that we're vulnerable in mobile, I'm curious if we should consider going after one or two of them. What do you think about this?

These pressures tend to be stultifying influences – and even after one of the largest and most rapid societal changes in generations, we can expect changes to be only one side of a dialectic swing which will settle somewhere between the old normal and new normal.

This section is going to deal with some of the trends in digital that have changed and how they may adapt over the next couple of years.

Keyword importance

The first trend we can look at as embodying the return to normal is 'near me.' 'Near me' keywords have been consistently trending upward for more than five years and, while the reason for the drop back to 2018 levels is obvious, the interesting thing is how quickly the bounce happened.



Despite the 23rd of March lockdown in the UK coming about half way in to the drop, we are back up to pre-Covid-19 levels of search volume this week (week beginning the 27th July) with the recovery beginning in the first week of May.

As with many of the trends, what may be driving this – at least in part – are new users driven specifically by the pandemic (anecdotally, I have done more local amenity searches than retail searches since lockdown).

The trend continues in to retail behaviour, however, with peaks in searches for hobby and leisure materials and equipment.

Why this matters

The reason we are pointing out these sudden and extreme shifts is simply to illustrate how quickly the pandemic has driven change in user behaviour. We wouldn't expect guitar playing to continue to grow exponentially, nor would we expect the nation to become a haven for cyclists – these are sudden shifts in user behaviour which are likely to return to pre-covid-19 levels once the pandemic passes.

However, they also represent opportunities in their relative sectors – searches for guitar accessories, for example, which tend to peak around Christmas each year, have yet to respond to the wealth of new guitarists, but are likely to experience a similar surge as tuners, capos, pedals become a must have for new players.

While this is a short term trend, it – and those like it – exemplifies a necessity, caused by the pandemic, for marketers to ensure they are prioritising the right keywords and are not missing any new opportunities. This goes for both organic and paid search – there have been significant short term changes in consumer behaviour combined with intent shift for a host of other queries and, as a result, the SERPs returned for them.

Google have had [patents on reacting to shifting intent](#) since 2018 ([as have Microsoft](#) – since 2009), and BERT and other ML and NLP updates and improvements have made their algorithms more capable of understanding and reacting to queries and changes in the intent behind them.

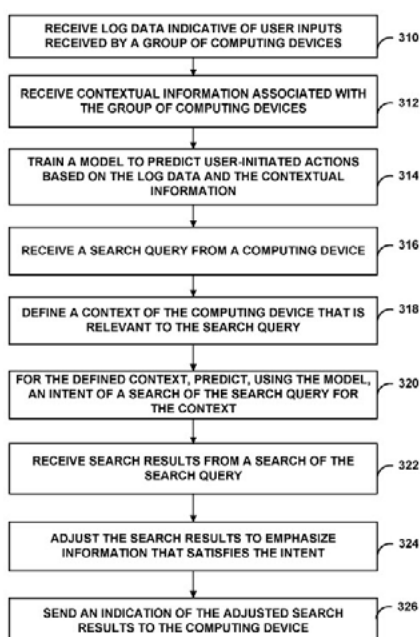


FIG. 3

Actions you can take

Ideally, you will be regularly reviewing keyword performance and monitoring for trends, but if not – there are plenty of tools that can offer a quick view of keyword performance. These include SEMrush, Ahrefs, Searchmetrics and the free Google Search Console keyword report. This kind of overview of ranking trends is an ideal position to start from, but shouldn't be the last.

What is different at the moment – as mentioned above – is that intent for a lot of queries has changed – meaning that your site may have dropped in the rankings for terms for no other reason than changes in the way people are searching (and vice versa). For this reason, keyword reporting needs to be followed by an analysis of the SERPs if there is significant volatility in your rankings.

This period also offers us the opportunity to prepare for the next 'surprise' lockdown – with covid-19 likely to be around for at least a year and pandemics predicted to become more common over the next decade, brands need to begin including such events in their emergency planning and the opportunity to conduct research around the shifts in intent happening within your sector and how that is impacting SERPs may be one of the few positives we can take from the present situation.

In addition, you may also see in GSC that you are getting traffic from new queries – equally, it's important to monitor these queries and attempt to establish whether they are entirely pandemic related, or whether they could be indicative of a 'new normal'

Action plan

- Conduct a full keyword research project to establish present trends
- Identify areas of extensive ranking fluctuation and research individual SERPs
- Monitor GSC to log new consumer queries
- Attempt to categorise new search query traffic by short, mid and long term trends
- Establish a plan for future emergencies – does your site need to better cater for the new intent behind searches? Can you create new pages or additional content that could be useful in future?

Demographics

Necessity may be the mother of invention, but it's also a driving force for behavioural changes and this is likely the largest factor in recent demographic changes online. While there is no UK equivalent research I've found so far, the trend is outlined in [a recent piece of research on Danish](#) trends by Deloitte, which found:

"Elderly consumers go online: As the elderly population is in self-imposed quarantine (and for longer time), their online shopping is expected to further increase as the existing behavioral trend is accelerated. The population aged 65 years and above consists of roughly one million inhabitants in Denmark, thus making up a sizable customer segment for companies to serve digitally in the future."

While Nielsen has reported the following about Chinese behaviour:

"According to Alibaba, the number of grocery orders placed by users born in the 1960s was four times higher than normal during Spring Festival. Miss Fresh, another online retailer in China, claims its users aged 40 years and older have risen by 237% during the COVID-19 period."

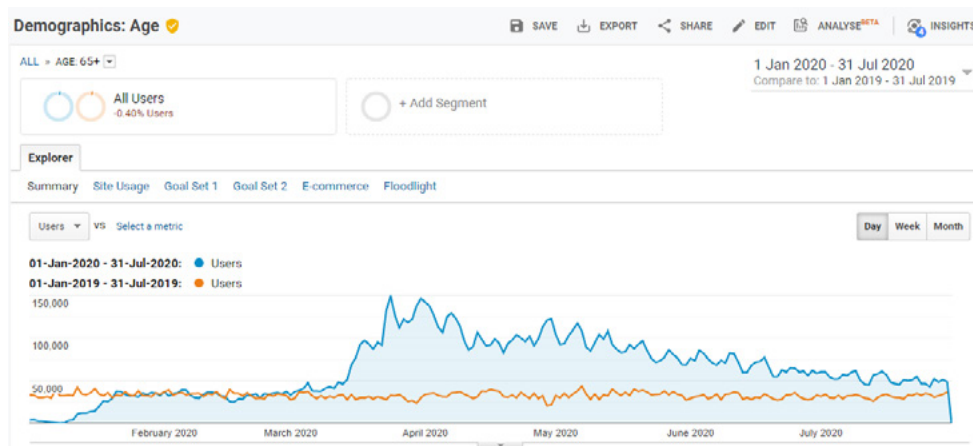
The issue is borne out by our own clients – like this UK retailer who experienced a 44% increase in online traffic during the lockdown (3M to 4.5M users) from the 65+ demographic.

Why this matters

The main consideration here is that it provides a test case for the future – while the necessity of internet use and eCommerce adoption has been thrust upon the 50+ demographic, digital natives are (sadly for me) getting older and are far, far too rapidly approaching this demographic bracket.

The present situation offers brands a unique opportunity to experiment. While it's likely to be impossible to retain all new users (the above brand appears to have levelled out at just above pre-pandemic levels), there is an opportunity to examine whether your site is serving the demographic as well as it could be.

This can be tied in nicely with the keyword research mentioned in the previous section – filter new queries by demographic, ensure your brand is catering to the way differing audiences search and is doing everything it can to offer a positive experience.



Actions you can take

While there are plenty of brands for whom demographics over fifty are not a priority, even these would still – I’m sure – be delighted to welcome older consumers to make a purchase from their site. For the majority of brands online, this demographic has traditionally been overlooked due to the fact that they are more reluctant than average to purchase online.

	49.23% ▲ 1,040,120 vs 696,992
1. 65+	
01-Jan-2020 - 30-Jul-2020	430,684 (41.41%)
01-Jan-2019 - 30-Jul-2019	354,018 (50.79%)
% Change	21.66%
2. 55-64	
01-Jan-2020 - 30-Jul-2020	200,966 (19.32%)
01-Jan-2019 - 30-Jul-2019	147,810 (21.21%)
% Change	35.96%
3. 45-54	
01-Jan-2020 - 30-Jul-2020	152,370 (14.65%)
01-Jan-2019 - 30-Jul-2019	93,537 (13.42%)
% Change	62.90%

Yet even sites which have catered specifically to older demographics such as the clothing retailer pictured right, have experienced major gains over the period of the pandemic vs. the same point last year. While some of this (most hopefully!) due to the work we have been conducting on the site, there is no doubt that this push online has played its part.

For that reason, the main action required of brands in response to this pandemic inspired shift is simply to take it seriously and attempt to earn the trust of new consumers and retain them. While it may not be vital for the traditionally offline businesses to which these consumers may return, it represents an enormous (and potentially profitable) for eCommerce only (or predominately) brands.

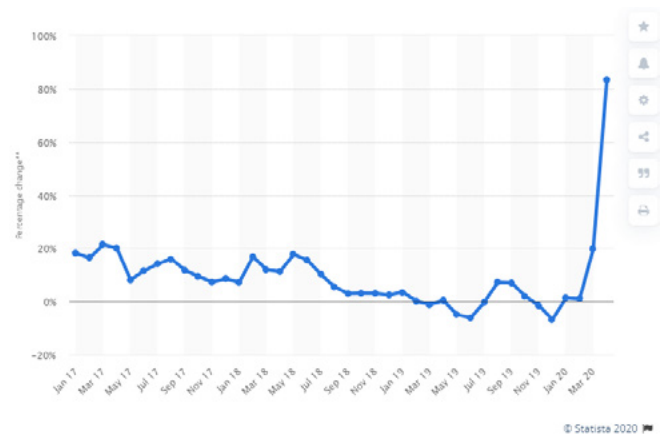
Action plan

- Examine your keyword strategy to ensure it caters for new demographics
- Ensure your site caters to the searches that these demographics are making
- Create content which can earn trust and engagement from new users
- Prioritise service and product revamps that cater to a booming user base

Ecommerce

Although the last 10 years has seen eCommerce treated far more seriously by brands of all shapes and sizes – [even Nike halted its Amazon direct sales experiment to sell direct to consumers](#), while several start-ups have been able to use D2C as a route to major markets (cf the podcast advertisers slowly beginning to appear in supermarkets). However, for some brands it has been a secondary concern – which may add a level of discomfort to [a recent survey](#) which found that 73% of UK consumers (of 1000 surveyed) stated that “current online experience from brands will change future spending post-lockdown.”

With consumers expressing intent to do more of their holiday shopping online and three quarters of them stating that they’re likely to spend the same as ever ([according to the same Rakuten study as mentioned earlier](#)), it is imperative to ensure that your eCommerce experience is the best it can be. This is, of course, not solely an issue arising from the pandemic – there are issues around speed, security, ease of purchase and personalisation that have also been growing in the online retails space – it just so happens that the pandemic is highlighting existing issues and accelerating existing trends.



Why this matters

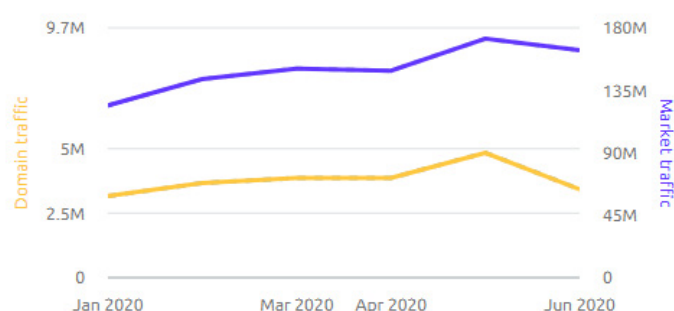
As with the other points, part of the reason it makes sense to act upon these changes is that it's highly unlikely that we've seen the last pandemic related lockdown (unless you're reading this in New Zealand – in which case, congratulations), but with eCommerce the developing trends are especially important.

The nature of eCommerce is yet to settle – there are dozens of ways that brands offer a digital shopping experience. If you compare this to how we have shopped offline for more than 100 years, it becomes noticeable how strange this is. Clothes shopping offline will take place in a layout almost identical from one shop to another – the same goes for grocery shopping (which is a science itself and interesting in a nerdy way), shoe shopping and more. There are very few that take the Argos model (only Screwfix that I can think of), and the reason for that is decade upon decade of research and testing.

This has not happened in eCommerce – while there are sand out models, there are significant differences in how brands handle navigation, personalisation, and a host of other facets of online shopping. While this is not an argument for conformity, there is a consumer pressure for brands to improve their online offering.

In January 2020, The Financial Times [covered the disappointing online performance of large retail groups](#), theorising a lack of adoption and progress during the 90s – but sadly, the sluggish progress is the norm rather than the exception. In order to take advantage of what is an opportunity for some brands to grow, there needs to be a concerted effort to improve the online experience across the board.

Total Traffic Trends 



Actions you can take

For eCommerce brands, the short term goal should be to improve the UX of their sites – whether that's navigation, categorisation, or checkout processes, there should be a focus on building on their current performance through testing and conversion rate optimisation. We've repeatedly made a point of the rising search volume (and will do again), but just from the perspective of accelerating trends the following pre-covid statistics should emphasise the importance of taking action:

- 79% of customers admit to searching for another site if the one they end up on doesn't live up to expectations (Digital Marketing Institute)
- Product reviews on your site can increase conversion rate by up to 76% (Shopify)
- Half of consumers expect a web page to load in two seconds or less and 40% of people will abandon a website that takes more than three seconds (KissMetrics)
- Customers who land on an autocomplete page suggestion are six times more likely to convert than those who don't (SLI Systems)
- 87% of consumers abandon their baskets before making a purchase (Forrester Research)
- A basket reminder strategy can recover as much as 25% of abandoned revenue, the majority of retailers (59%) don't employ this strategy (Persomi)

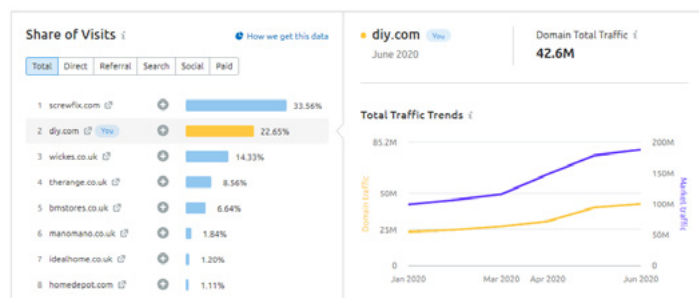
Action plan

- Undertake a full UX audit – check your navigation, checkout process and product pages
- Look at implementing a review facility for your products to help build trust
- Begin personalising the consumer experience (for logged in consumers)
- Use abandoned basket emails to remind consumers of the products they added

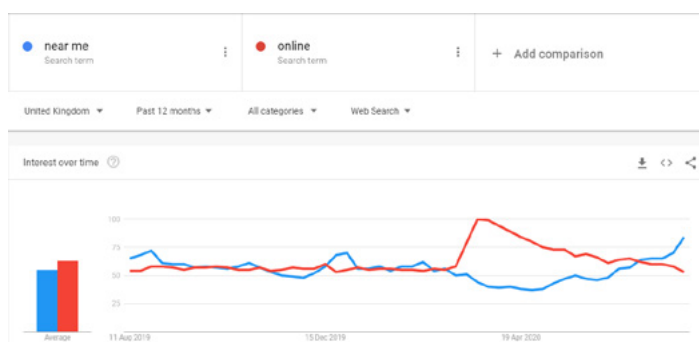
SEO tactics and strategies

Search volume is increasing across industries; and around the world – we know that consumers are out there looking, but what most brands have not done is to try to adapt to that. For the most part, brands have looked to add specific covid-19 pages, or run specific covid-19 ads, but there have been changes to the way we search that go far beyond covid-specific keywords.

Even brands that have performed well could look back on this period as a disappointment – take the following, for example: diy.com has increased traffic by just under 23% during a period when the market traffic estimation has doubled.

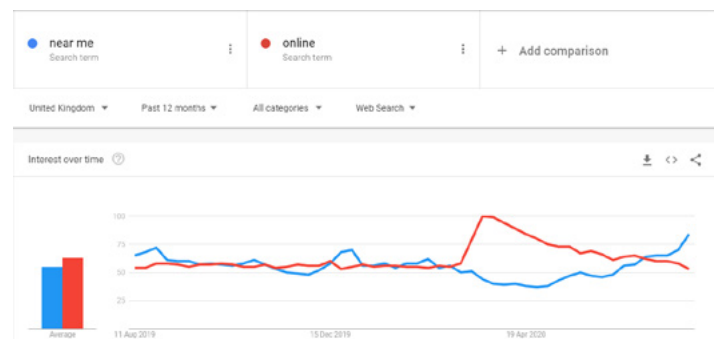


While we can't change the industry we're in just because there has been a change in the way people are searching, what we can do is attempt to keep on top of these things. You can see the swing in just the trends for 'near me' and 'online' search terms. These are likely to continue to weave in and out of favour over the coming years, so it's important that we're able to cater to both.



Why this matters

Again, while the increased traffic may not be here to stay – and, in some cases, is beginning to trend toward the average, the amount lost by Primark this year (who have no eCommerce capability) should serve as a warning. We have no real idea how the next couple of years are going to pan out, but we can say that uncertainty and lockdowns (full or targeted) are likely in the short term, so we need to – forgive the oxymoron – expect the unexpected, and begin to get ready for another year of variability by making sure that such peaks in search volume over the lockdown periods are being harnessed to the best of our ability.



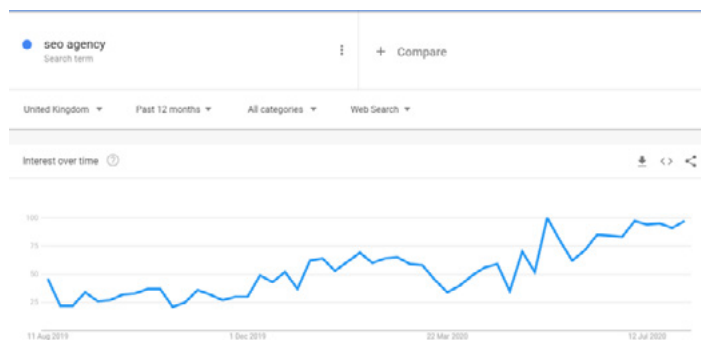
As with the points made in the eCommerce section, this is not restricted to search volume changes; there are trends that have accelerated, and others that have changed course. While there was little warning for the pandemic, there have been years of warnings on issues that have been amplified by it.

Actions you can take

This includes issues with speed, accessibility and covers plenty of intermediate issues from content to usefulness.

As shown in the chart previously with the fluctuating search volume for 'near me' and 'online', there will need to be an agile approach to local search – this will include updating your GMB listing with any pertinent information, as well as updating your org schema or other meta-data that may be sending the wrong signals if delivery/open hours etc. change.

In addition, brands need to reviewing their technical SEO – ensuring that pages, meta-titles and descriptions are optimised for the way thing are, and not how things were when they were written. This can perhaps be seen in the exploding interest in the term 'seo agency.'



Action plan

- Conduct a full SEO audit and begin to plan for similar situations, lockdowns etc.
- Improve your speed – with more than 70% of consumers expressing frustration with site speed, this becomes twice the problem when you're alienating twice the users
- Update your Google My Business listing with relevant information
- Ensure your structured data is accurately describing your site at all times

Conclusion

There's a lot to be done in response to the changing landscape online, but there is ample evidence on what precisely has changed for us to be able to make plans to help us adapt to these changes. While the areas highlighted here are far from the only issues for brands online, they are among the most difficult and urgent.

We hope the information we've presented here will help you to make the decisions necessary, or make the business case for stakeholders that will enable you to implement necessary changes. For more help, you can check out our resource section.

Get in touch with us today

About us

Click Consult is a multi award-winning digital and search marketing agency with a focus on organic (SEO) and paid search (PPC). Part of global consumer brand business Ceuta Group, we have a team of 70-plus specialists and a portfolio of more than 60 clients worldwide.

Our complementary services include content marketing, outreach, social media, conversion rate optimisation (CRO) and international/multilingual search marketing. We can also offer training and consultation to support your teams or existing strategy.

Click was named Organic Search (SEO) Team of the Year 2020, adding to our long list of other awards and accolades, and also ranks within Econsultancy's 'Top 100 Digital Agencies,' and Prolific North's 'Top 50 Digital Agencies' We're also a Google Premier Partner, a Bing Select Partner and feature in The Drum Recommends.

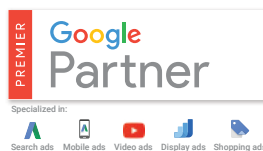
HOW CAN WE HELP YOU?

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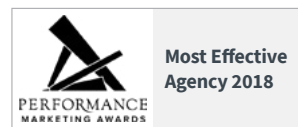
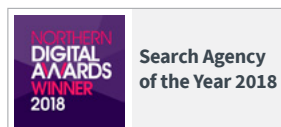
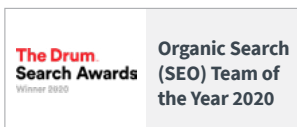


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