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Sector Report

An exclusive snapshot of the online search landscape

BEAUTY

DECEMBER 2019

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Your Beauty sector report

Digital is a complex space, and search marketing, in particular, can be tough for even the most seasoned marketer to get right. But it needn't be so complicated. That's where our sector reports come in – we take the most prominent keywords across a variety of industries, input them into our proprietary tool, Prism, which analyses and sorts the data, and packages it all neatly to unveil which brands are the most visible in the Google UK organic search and paid search listings. Thanks to Prism handling all the data analysis, you just need to worry about finding 10 minutes to read our report so you can find out how your brand is performing against competitors in your sector. Nifty, right?

But sector reports aren't anything new to us. In fact, we began producing them nearly a decade ago. We know how time-strapped marketers can be, and the struggles involved with getting a single view of brand performance. So, we figured we'd change that – and that marked the catalyst for our first ever sector report back in 2011. Over that time, we've tinkered and improved them to ensure they're the most up to date, fair representation of what's happening across different sectors on Google UK. Most recently, we re-built our sector reports from the ground up; it was time for a makeover anyway. Why does that matter to you? Because now they're the best they've ever been, giving you access to an easy-to-digest snapshot of brand presence across any sector, all backed up by the latest data and information needed to generate insights you can trust.

We'd love to hear from you if you have any questions about our sector reports. Shoot across any thoughts or questions to Katrina.

I hope you enjoy your December edition of the Beauty sector report.

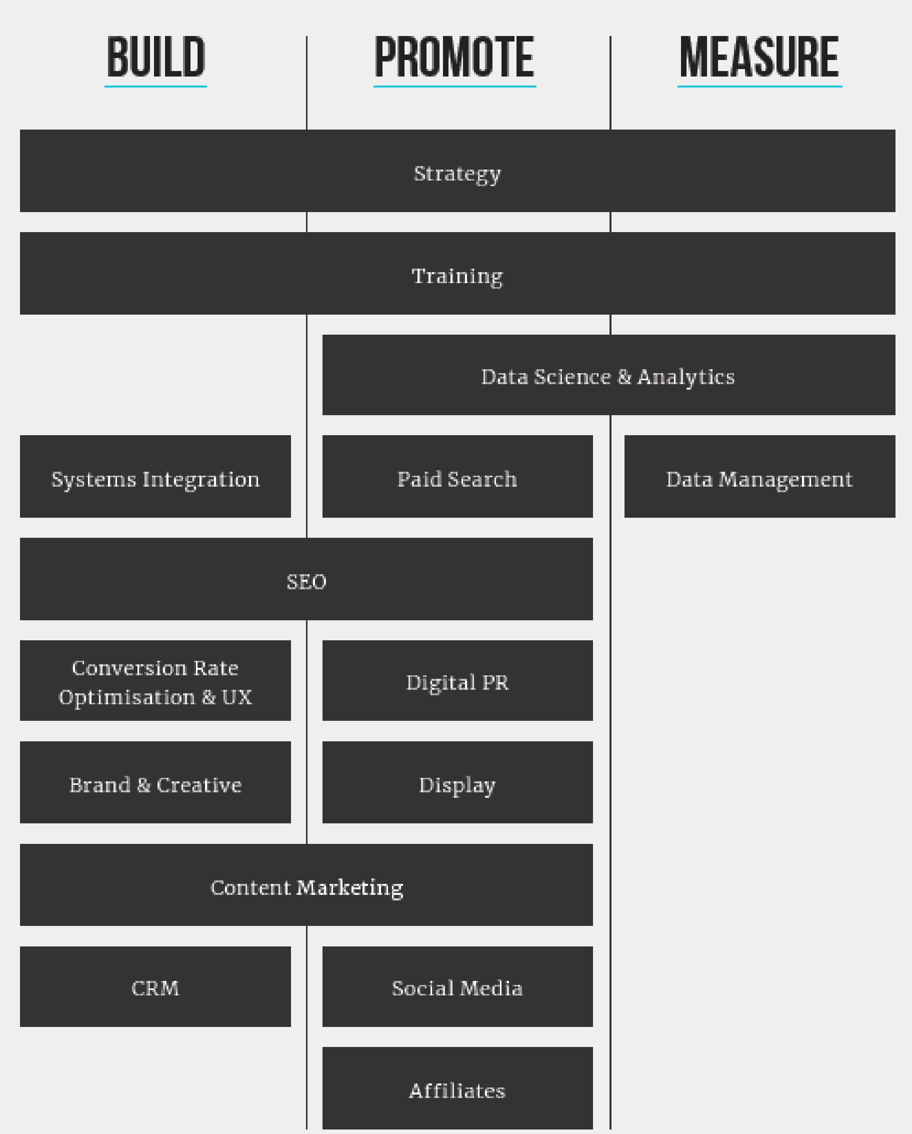
Enjoy reading,

Andreas Pouros,
CEO & Co-Founder at Greenlight

WHO WE ARE

Greenlight is a multiple award-winning digital and commerce agency that designs, builds, consults, trains and implements transformational strategies across: paid search & Shopping, programmatic display, SEO, content marketing, digital PR, creative, site design & build, analytics, eCommerce systems integration, conversion rate optimisation, user experience, affiliate marketing, and data & audience insights. With the consistent objective of achieving dramatic growth for its clients, Greenlight delivers innovative work for brands such as ghd, Dixons Carphone, Superdry, Furniture Village, and eBay in over 30 countries.

What we do



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Your Beauty leaderboard

The top 30 performing Beauty brands in December 2019, including the top 3 leaders, were:

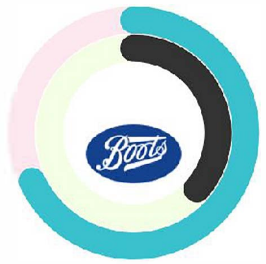
amazon.co.uk

SoV: 86% Keywords: 87%

superdrug.com

SoV: 72% Keywords: 25%

boots.com



SoV: 68% Keywords: 36%

Position	Brand	Volume	Number of Keywords	Share of Voice	Change
1	amazon.co.uk	7,054,210	2374	85.9%	↔ 0
2	superdrug.com	5,883,780	681	71.7%	↔ 0
3	boots.com	5,582,260	993	68.0%	↔ 0
4	lookfantastic.com	5,446,840	1617	66.3%	↔ 0
5	johnlewis.com	5,046,490	1204	61.5%	↑ 1
6	cosmopolitan.com	4,601,650	744	56.0%	↓ 1
7	very.co.uk	4,311,090	211	52.5%	↑ 1
8	feelunique.com	4,280,050	1350	52.1%	↑ 1
9	debenhams.com	4,094,660	888	49.9%	↓ 2
10	ebay.co.uk	3,926,690	1282	47.8%	↑ 3
11	argos.co.uk	3,692,100	136	45.0%	↑ 3
12	thesun.co.uk	3,420,060	386	41.7%	↑ 5
13	goodhousekeeping.com	3,400,700	564	41.4%	↑ 3
14	selfridges.com	3,141,130	944	38.3%	↑ 15
15	elle.com	2,979,340	595	36.3%	↔ 0
16	beautybay.com	2,925,390	591	35.6%	↓ 4
17	asos.com	2,899,470	639	35.3%	↓ 7
18	cultbeauty.co.uk	2,736,860	1886	33.3%	↓ 7
19	treatwell.co.uk	2,507,840	201	30.5%	↑ 2
20	harpersbazaar.com	2,440,790	366	29.7%	↑ 5
21	allbeauty.com	2,427,450	318	29.6%	↔ 0
22	independent.co.uk	2,389,130	491	29.1%	↓ 4
23	marieclaire.co.uk	2,232,770	471	27.2%	↓ 4
24	houseoffraser.co.uk	2,211,500	402	26.9%	↔ 0
25	glamourmagazine.co.uk	2,130,810	408	26.0%	↓ 3
26	sallybeauty.co.uk	2,124,300	78	25.9%	↑ 19
27	refinery29.com	2,008,800	448	24.5%	↑ 5
28	byrdie.com	1,961,550	563	23.9%	↓ 8
29	salonsdirect.com	1,747,130	52	21.3%	↔ 0
30	allure.com	1,736,090	951	21.1%	↓ 7

INTEGRATED SEARCH

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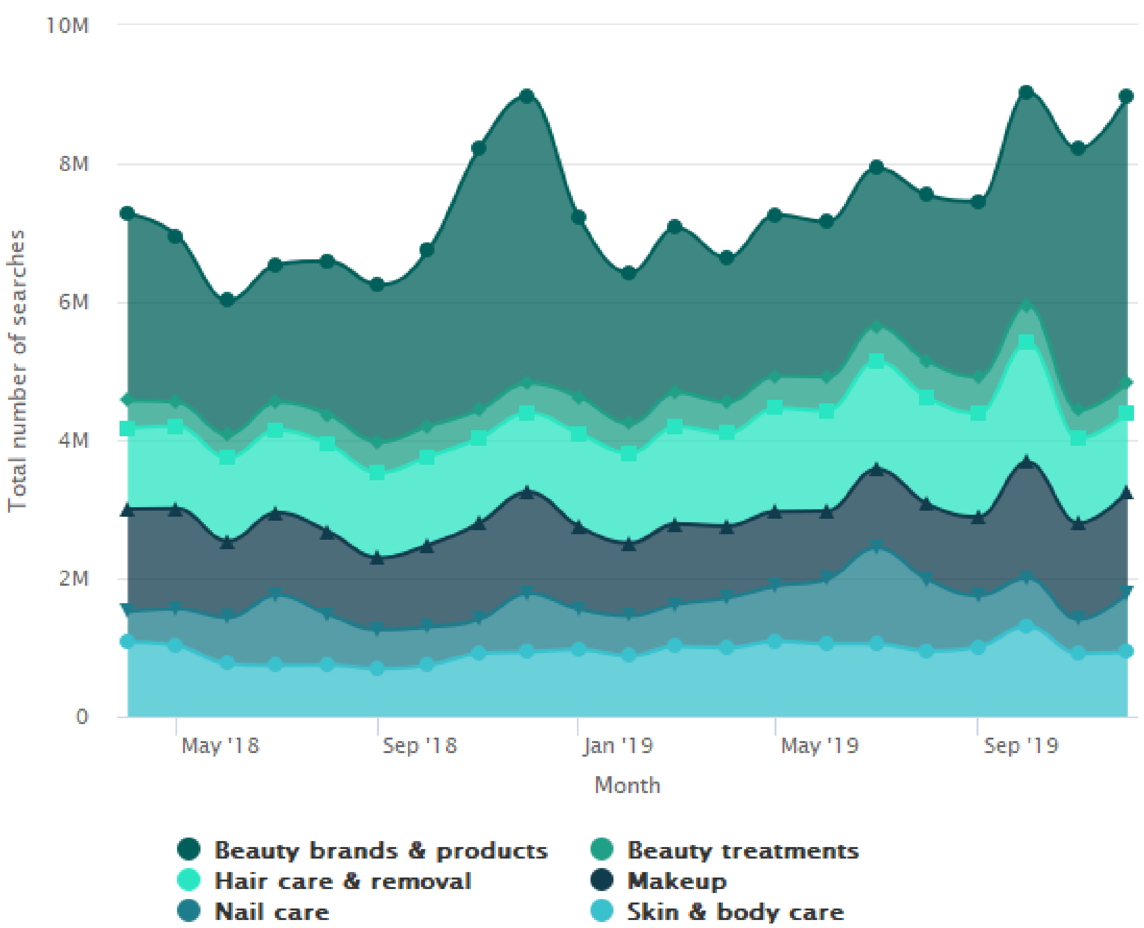
Search landscape

This report profiles search behaviour for the online Beauty sector. It analyses which websites, advertisers and brands were most visible in the Google UK organic search and paid search listings, when consumers searched for Beauty-related terms. 2723 Beauty-related keywords have been analysed to make this report, which is made up of 6 categories: **Makeup, Nail care, Skin & body care, Beauty treatments, Hair care & removal, Beauty brands & products**.

Search volume trends

The graph below gives an overview of the total number of searches made for the online Beauty market over the last 12 months based on our analysis of 2723 keywords. In December, there were **9.0 million** Beauty-related searches made, with **Beauty brands & products** making up the majority of searches among the 6 subsectors

Total number of searches by category



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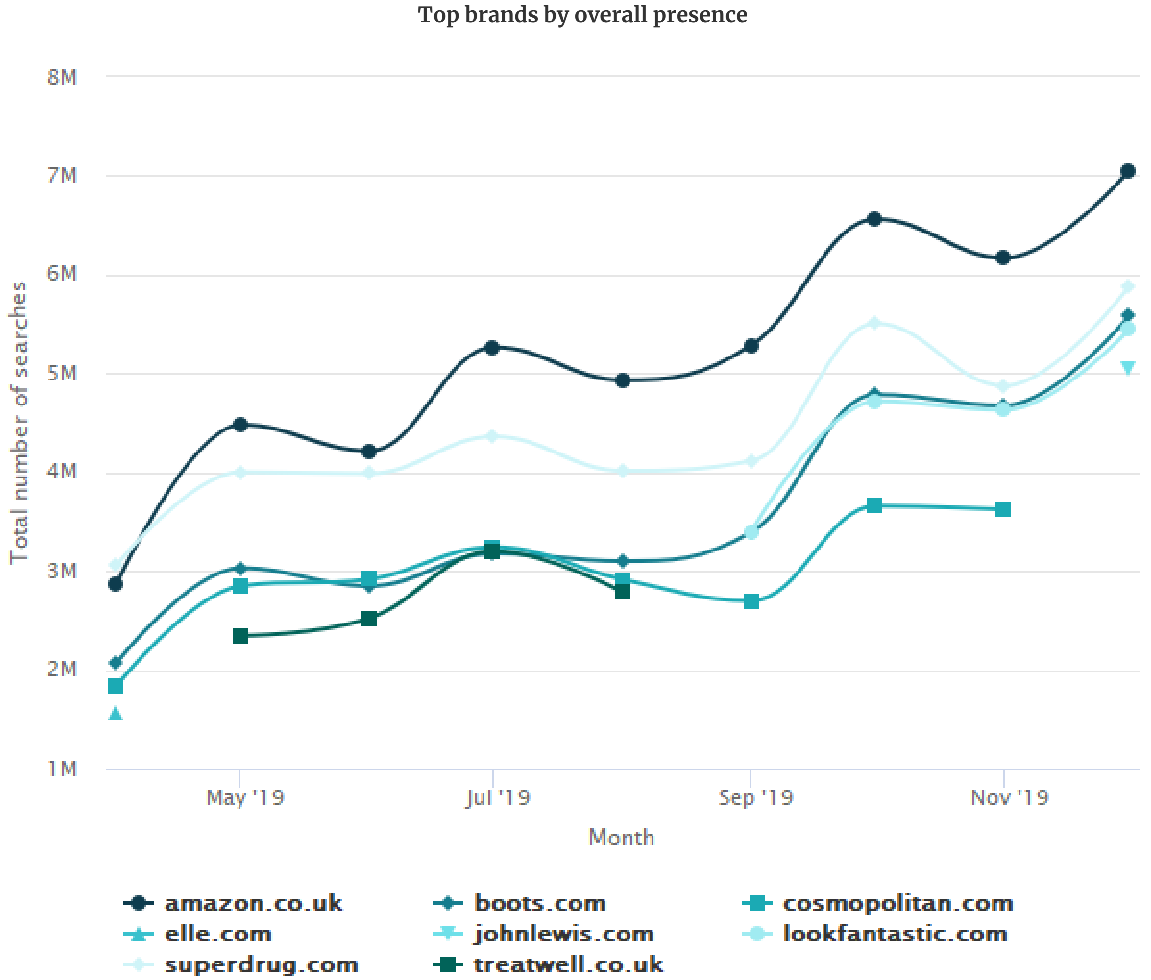
Top 5 brands by organic and paid search overall presence

The graph below gives an overview of integrated brand presence based on the brands which achieved the highest-ranking position on page one of Google UK over the last month for beauty-related organic search and paid search listings within our keyword set.

- Amazon.co.uk was the most featured brand overall across organic and paid search listings over the month analysed, appearing for 7.1 million searches over that time
- Superdrug.com was the second most featured brand across organic and paid search listings based on the 5.9 million searches made over the past month



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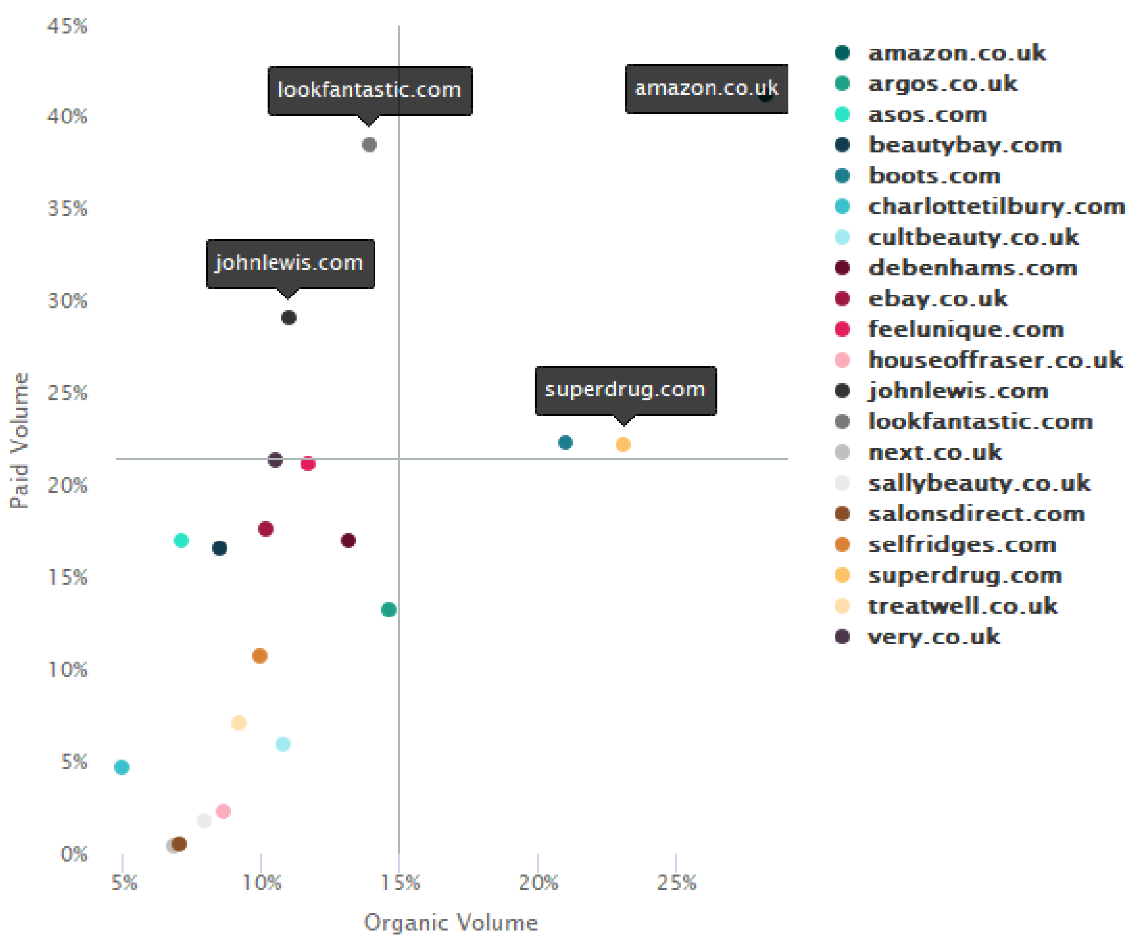
Organic and paid search overall presence

The graph below analyses the integrated search performance of the top 20 brands to show which were most visible overall on Google UK. Where a brand sits on the graph indicates their strength with regards to organic and paid presence.

- Amazon.co.uk achieved strong integrated search visibility
- The top three advertisers within the organic listings are Amazon.co.uk, Superdrug.com and Boots.com
- The top three advertisers within the paid listings are Amazon.co.uk, Lookfantastic.com and Johnlewis.com

Integrated search performance of top 20 brands



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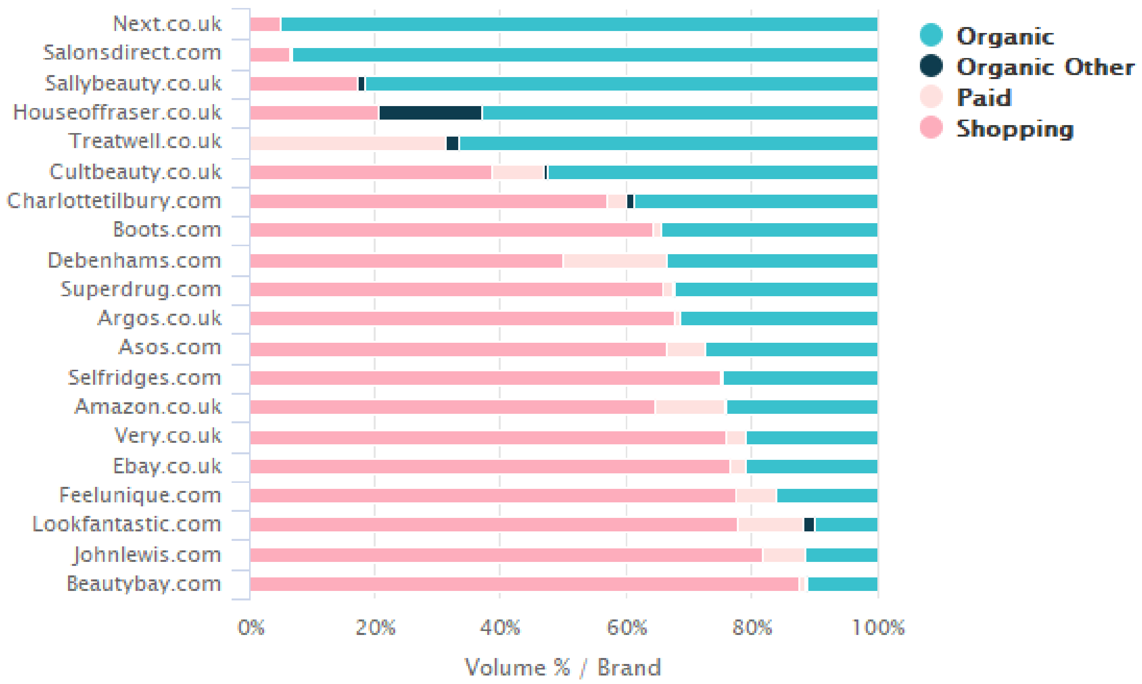
Brand presence by organic, other organic, Shopping ads, and text ads

The graph below shows a brand’s strategy by feature type within the SERPs of the top 20 Beauty brands for the 2723 keywords analysed.

- Next.co.uk applied a mostly organic strategy compared to other brands in the top 20
- Houseoffraser.co.uk mostly depended on an ‘other organic’ strategy
- Treatwell.co.uk was the brand that relied most heavily on a paid strategy compared to other brands in the top 20

Brand presence by Shopping, text ads, organic and other organic



Top 10 search terms

Of the 9.0 million searches made by consumers searching for Beauty-related keywords made in last 30 days, the top search term overall was acrylic nails, which accounted for 2.05% of all searches made.

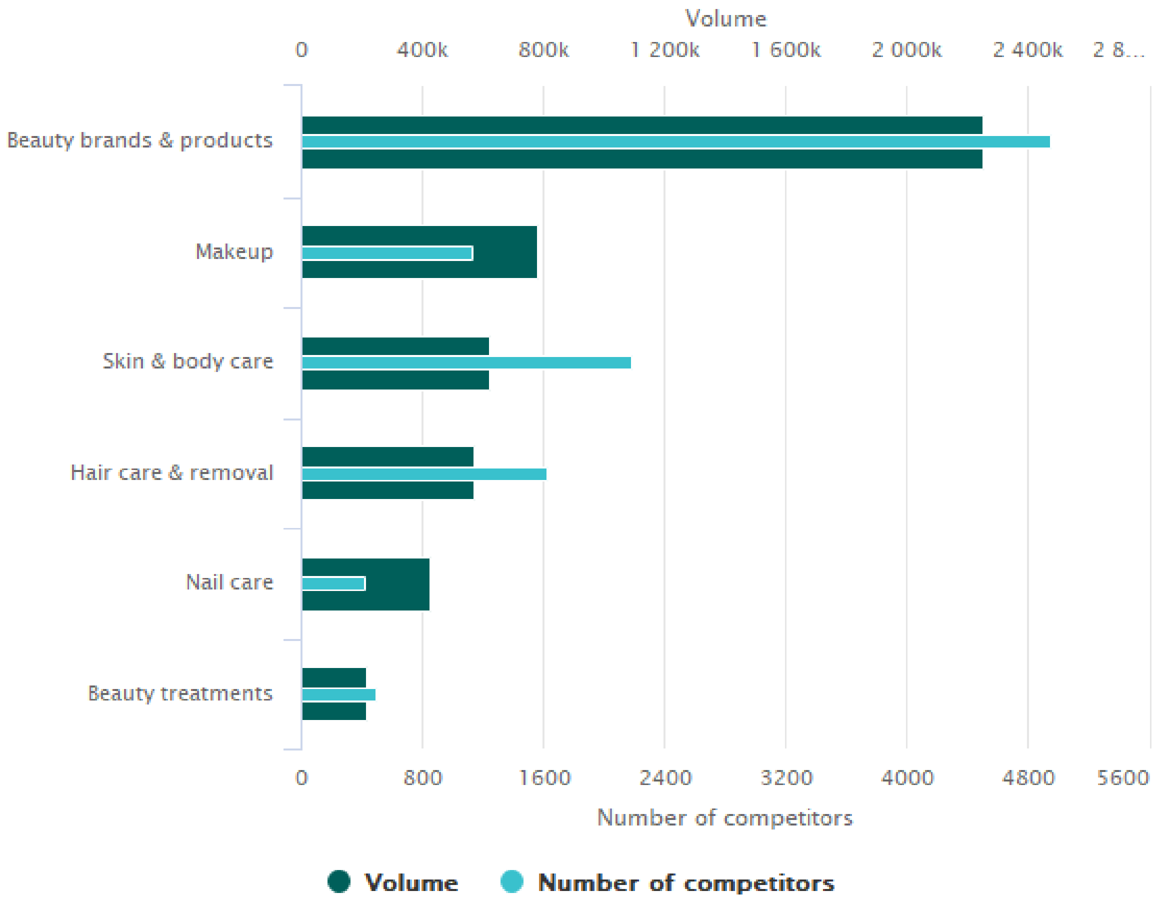
Keyword	Volume	SoV
acrylic nails	184000	2.05%
hair dryer	184000	2.05%
hair straighteners	150500	1.68%
makeup brushes	150500	1.68%
perfume	123000	1.37%
ghd	100500	1.12%
beard trimmer	82500	0.92%
hairdressers near me	67500	0.75%
makeup bags	67500	0.75%
electric shaver	67500	0.75%

Search volume and number of competitors by category

In order to maximise brand presence without overspending, it's important to understand the potential exposure available across each category and how competitive that space is. However, the visibility of competitors, buying intent of audiences, and keyword competitiveness in each category must also be considered in order to make a fair judgement of the opportunity available.

- The category with the fewest competitors relative to total search volume is Nail care
- The categories with the most competitors relative to total search volume are Skin & body care followed by Hair care & removal

Search volumes and number of competitors by category



ORGANIC SEARCH

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Organic Search

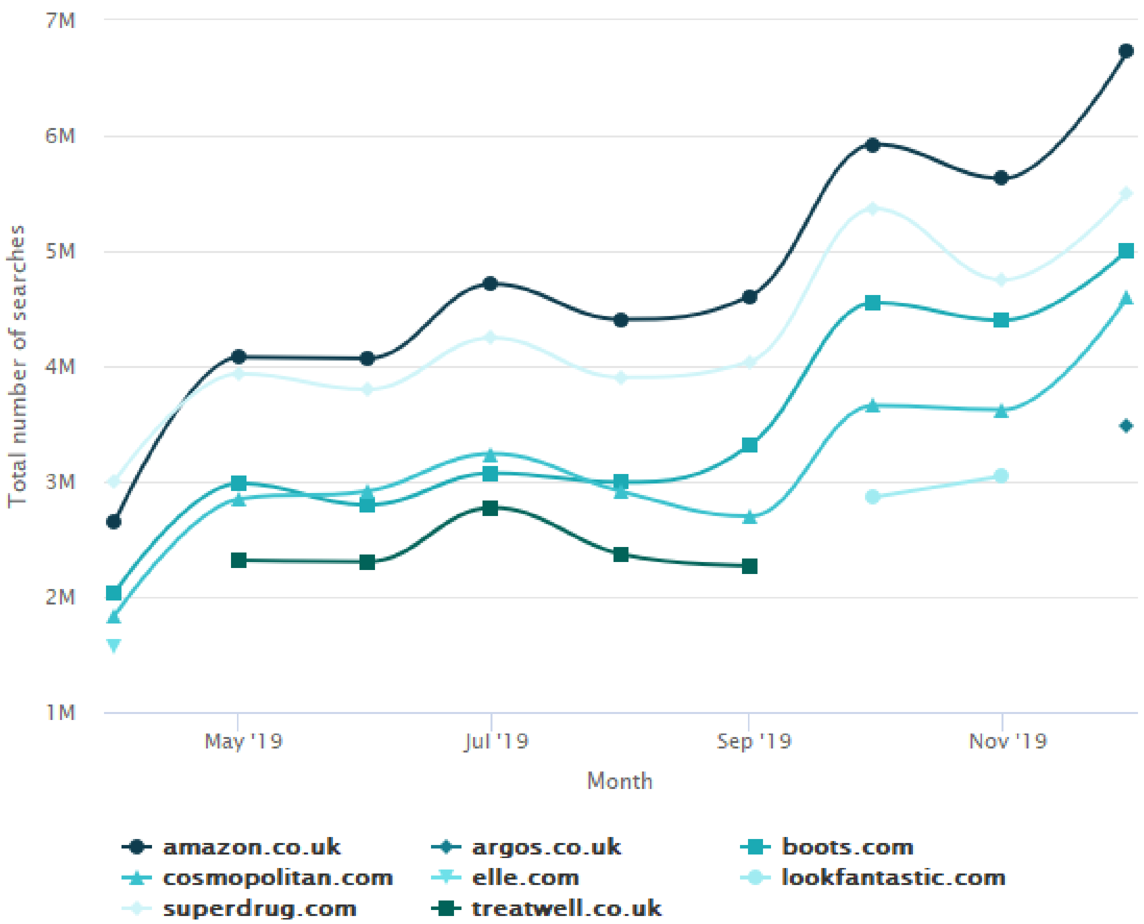
This section shows which websites were most visible in the natural search listings on Google UK across all the organic SERP types for the categories and keywords analysed.

Top 5 brands by organic search presence

The graph below gives an overview of the brands which featured most over time for Beauty-related organic search listings within our keyword set.

- The biggest movers in terms of volume compared to the previous month were Cosmopolitan.com and Amazon.co.uk, which respectively changed their positions by 27.00% and 20.00%

Top websites by monthly organic search presence



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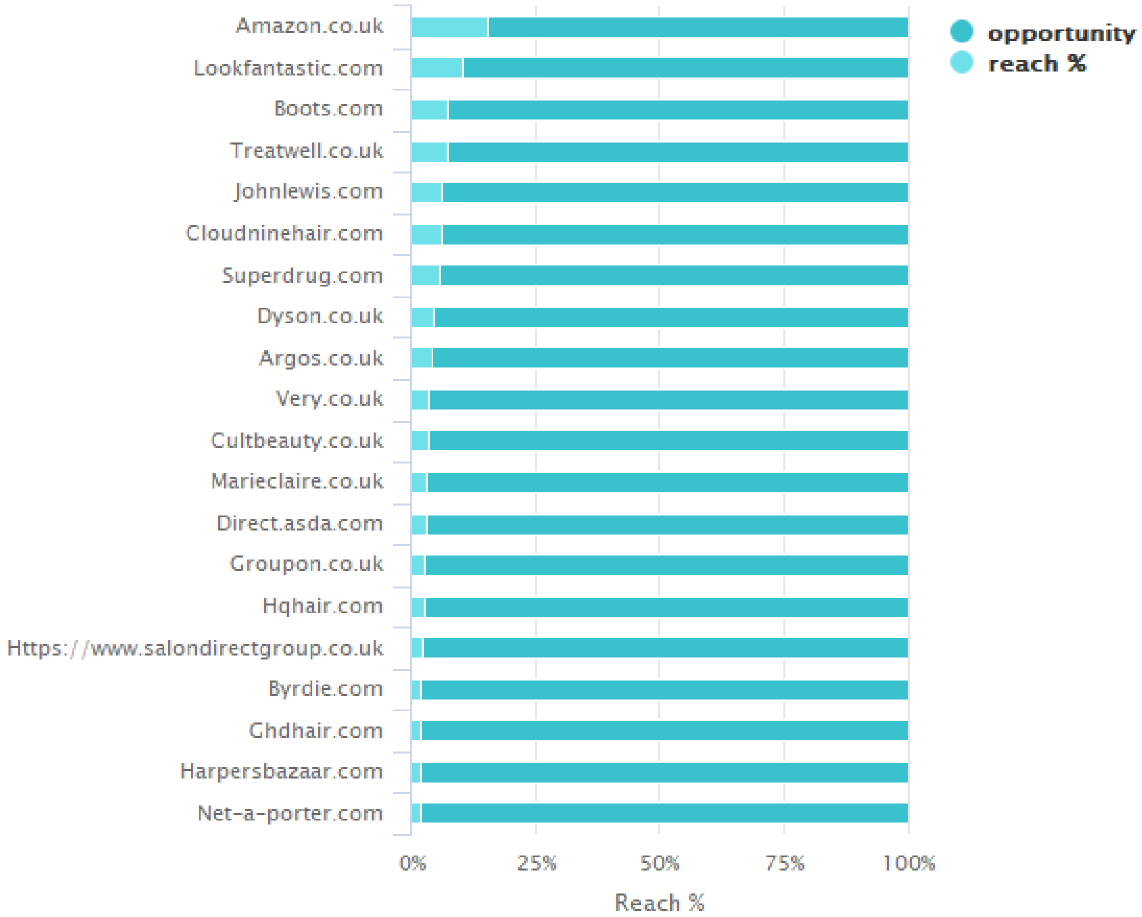
Organic reach vs opportunity for top 20 brands

The image below shows the aggregated reach values for the top 20 brand websites against the potential reach opportunity, highlighting where areas of opportunity lie to maximise presence, as well as how brands stack up against one another from an organic reach perspective in the Beauty sector on Google UK.

- When it comes to organic visibility, the most prominent brands are Amazon.co.uk and Lookfantastic.com

Top 20 websites by organic reach %



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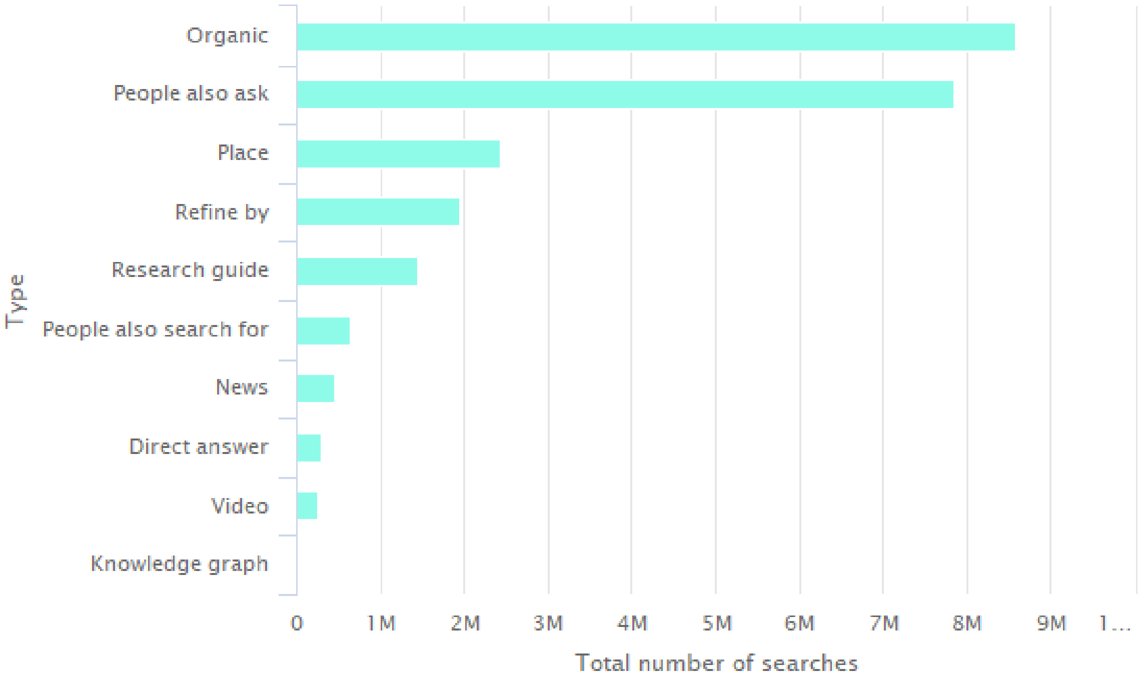
Organic breakdown by SERP feature

The image below shows the available volume for organic SERP types for all the subsectors and the 2723 analysed.

- The three most prominent SERP features triggered for Beauty-related keywords are **organic, people also ask** and **place**
- The least prominent SERP features triggered for Beauty-related keywords are **direct answer, video** and **knowledge graph**

Search volume opportunity by SERP feature



PAID SEARCH

Paid Search

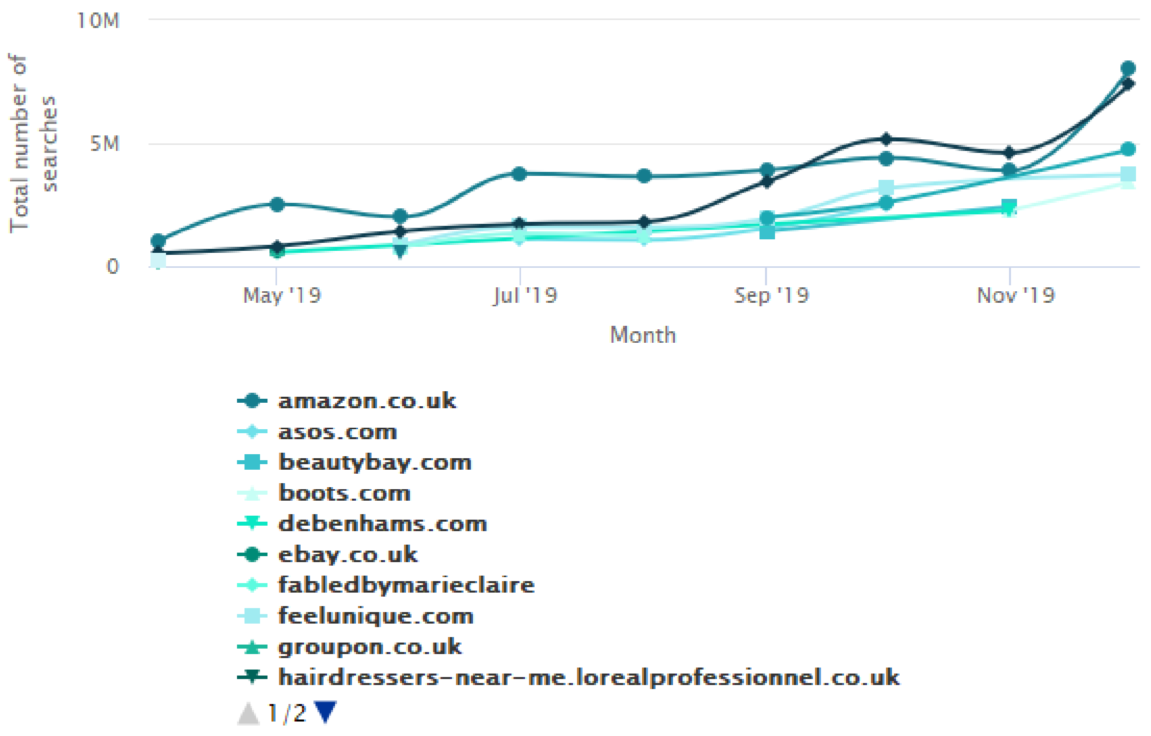
This section shows which brands had the most visible ads on Google UK for the subsectors and keywords analysed.

Top 5 brands by paid search presence

The graph below gives an overview of the most visible Beauty brands for both text ads and Shopping ads over time.

- The biggest movers in terms of volume compared to the previous month were Amazon.co.uk and Lookfantastic.com, which respectively changed their positions by 106.00% and 61.00%

Top advertisers by monthly paid search presence



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Top 10 most featured brands by text ads

The image below shows the most visible advertiser websites for Beauty-related paid search text ads only.

- The most visible advertiser in this category is Amazon.co.uk followed by Lookfantastic.com

Brand	Volume	Avg ad position	SoV
Amazon.co.uk	4572810	69.42	59.07%
Lookfantastic.com	3065390	55.36	39.60%
Debenhams.com	1342340	62.32	17.34%
Fragrancedirect.co.uk	1236160	88.57	15.97%
Johnlewis.com	1145860	59.27	14.80%
Feelunique.com	971690	66.34	12.55%
Treatwell.co.uk	971680	28.00	12.55%
Beautyexpert.com	864890	52.56	11.17%
Maccosmetics.co.uk	765320	43.56	9.89%
Uk.remington-europe.com	618520	73.09	7.99%

Top 5 most featured ad copies

The image below shows the most visible ad copy for Beauty-related terms.

- The most visible ad copy in this category is https://www.amazon.co.uk followed by https://www.maccosmetics.co.uk

Title	URL	Description	SoV
Hair-dryer at Amazon.co.uk | Low Prices on Hair-dryer	https://www.amazon.co.uk	Shop Devices, Apparel, Books, Music & More. Free U...	2.38%
All Brushes | MAC Cosmetics - Official Site - MACcosmetics.co.uk	https://www.maccosmetics.co.uk	Free Delivery With Every Order. Give The Gift Of M...	1.94%
80% Off Brand-Name Perfume | Perfume.com	https://www.perfume.com	The most trusted fragrance store in America. Top b...	1.59%
GHD | Available at NET-A-PORTER	https://www.net-a-porter.com	Shop the latest beauty collections now. Next-day d...	1.30%
Gillette | Beard Trimmers Available | Disposable Razors	https://www.gillette.co.uk	Sign Up To Our Newsletter And Receive The Latest E...	1.07%

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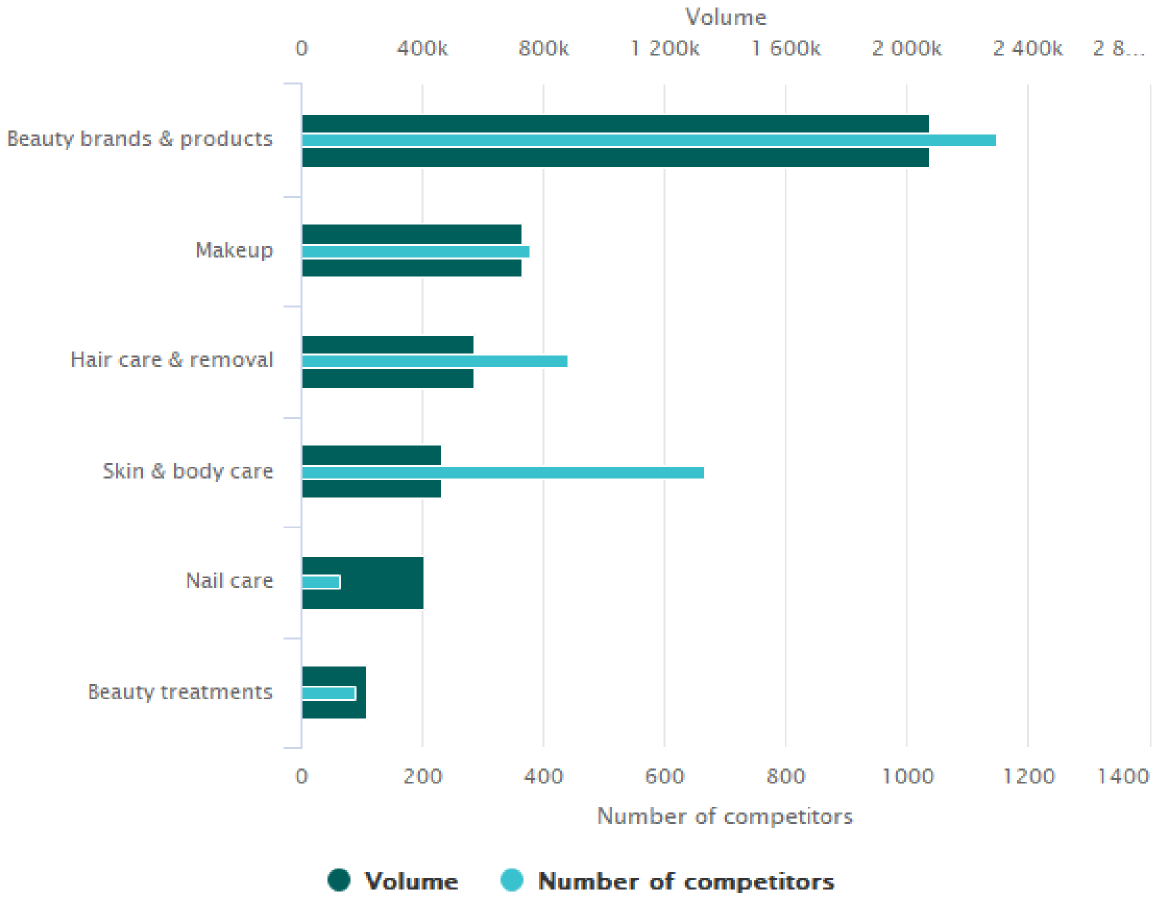
Paid search volume and number of competitors by category

The graph below gives an overview of paid search volumes and number of competitors across all categories analysed, highlighting the potential exposure available across each category and how competitive that space is. However, the visibility of competitors, buying intent of audiences, and keyword competitiveness in each category must also be considered in order to make a fair judgement of the opportunity available.

- The category with the fewest competitors relative to total search volume is **Beauty treatments**
- The most competitive categories from a competitor to volume perspective are **Skin & body care** followed by **Hair care & removal**

Paid search volumes and number of competitors by category



APPENDIX

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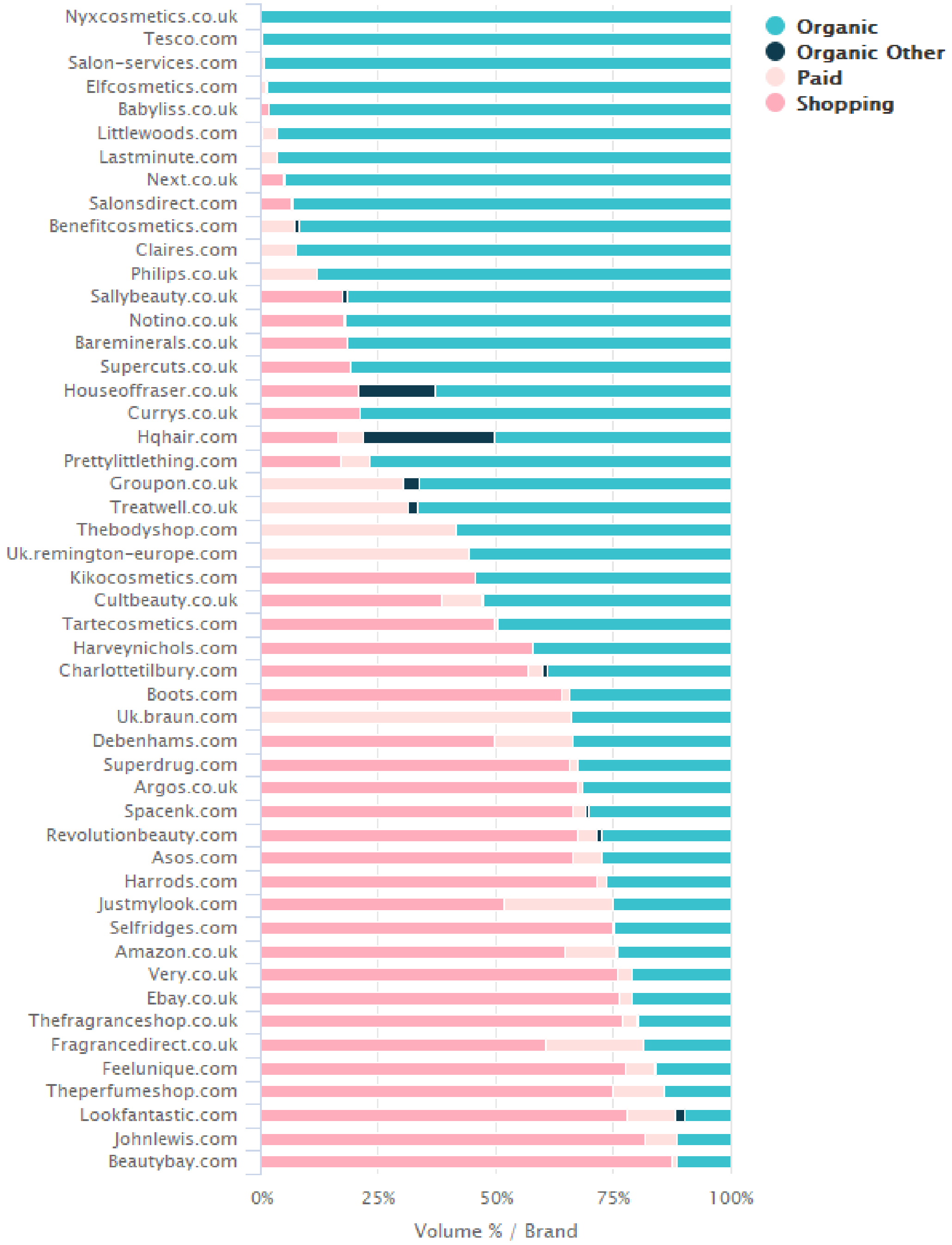
APPENDIX

The visibility obtained by each of the websites and advertisers featured in this report have been added together and ranked according to their total visibility in the search space. The league table below, therefore, show which websites achieved the greatest share of integrated search visibility on Google UK.



ABOUT

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Glossary

Competitors: The brands, resellers and advertisers competing within the search space, displaying ads and organic results within the search results page on Google.

Organic search: The listings within the Google results page which are not paid for when a user clicks on them.

Other organic: The listings within the Google results page which are not paid and other than classic organic listings such as location listings, people ask for etc.

Paid search: The listings within the Google results page which are paid for when a user clicks on them, including text ads and shopping ads.

Reach: In our reports, reach refers to the actual rank position of a brand combined with the listing volume.

Search query: The word or phrase entered into the search query box in Google.

Search volume: The estimated number of searches for a given search query or group of search queries. All data is based on the most recent volume information available. Search volumes for the most recent month are forecasted, and in some cases the month prior to that is forecasted if enough data wasn't available at the time of analysis. All volumes present in the graphs are based on analysis of the keyword set used to generate this report, made up of 2723 keywords in total.

SERPs: Search engine results pages.

Share of voice: This represents the search volume achieved by a brand on page one in Google UK organic search listings for the keywords analysed.

Shopping ads: Ads on the Google search results page which show in the Shopping listings either at the top or side of the page, consisting of a product image, title, description and price.

Subsectors: Groupings of the keywords used for the sector report by relevant topics.

Text ads: Ads on the Google search results page which contain only text, i.e. headline and description lines.

Websites: The brands, resellers and advertisers displaying ads and organic results within the search results page on Google.

About this report

Greenlight's Data Science & Audience Insights team used its proprietary Prism platform to analyse 2723 Beauty related terms queried by online consumers. Prism analysed which websites and advertisers appeared for the Beauty keywords and from there, ranked them based on their visibility in the organic search listings and paid search listings on Google UK.

All data displayed in this report is based on a wide range of keywords, and therefore aims to provide readers with a generic overview of the online energy sector at the time the report was created. Due to targeting or language settings, occasionally foreign domains may appear across natural and paid search results. These domains appear in our reports just as they would for a search containing the related keywords.

The data in this report is based on snapshots taken each month, to avoid capturing aggregated monthly values which may fluctuate.

Understanding the graphs in this report

To help readers get the most out of our reports, we've put together a breakdown of what's been analysed and what's being shown for each of the graphs in this report.

Search volume trends (integrated, organic, and paid): Depending on which SERP features are being focused on, the data will be filtered by that feature and grouped by brand name rather than individual URL (as some brands could rank multiple times for one keyword with differing URLs).

Top brands by presence (integrated, organic, and paid): The highest ranking position for brands on page one are selected (to prevent any volumes being double counted), their respective search volumes added to our SERP data, and then that data is summarised into the graph to show the brands with the greatest presence for the month analysed. As those brands are subject to changes on a monthly basis, there may be instances where the trend line is broken due to any fluctuations in positions.

Organic, other organic, and paid search overall presence: Data is aggregated into two main groups – **paid** (Shopping and text ads) and **organic** (includes all non-paid features, such as organic search, people also ask, video, image, place, knowledge graph, etc.). The data is then sorted to unveil which brands are featured the most, which is done by collecting the highest-ranking positions and adding the volumes to calculate the percentage coverage value (i.e. the volume the keywords appear for) for each individual brand and feature. This involves dividing the keyword volumes triggered by the total volume available for the keyword set.

Brand presence by organic, other organic, Shopping ads, and text ads: This graph shows brand presence broken down by SERP feature. It may showcase different brands compared to overall presence graphs, as it accounts for brand SERP feature presence variance rather than analysing them based on grouped data for organic and paid listings. To classify each brands' presence by SERP feature, we group our data into the mentioned categories, and then aggregate it by brand, select each brands' highest ranking position, calculate the total volume of keywords triggered by each brand and its respective SERP categories, and then classify the top 20 brands based on the keyword volumes triggered across the various SERP categories. This is compounded with calculating the volume percentage value for each SERP category and the number of brands to give an overview of their presence across various SERP features.

Top 10 search terms: The 10 most prominent search terms based on the keyword set we analysed for this report.

Search volume and number of competitors by category: The volumes shown are the sum of the keyword set analysed within each category for the current month (or the previous month if data for the current month isn't available). The number of competitors is calculated based on the number of brands featured for each keyword set. The data is filtered depending on whether the graph is displaying results for organic search, paid search, or all SERP features.

Organic, other organic, and paid search strategy breakdown by brand: This graph shows the actual reach value based on the highest-ranking position each brand achieved in the SERPs. The results are representative of data gathered across all paid and organic features (paid search, organic search and other organic results).

Organic reach vs opportunity for top 20 brands: This is an overview of individual brands' reach on Google UK compared to the overall opportunity within organic listings.

Organic breakdown by SERP feature: This is the sum of keyword volumes that trigger for each feature and gives an overview of areas for opportunity to grow.

Top 10 most featured brands by text ads: This graph shows the brands which were featured most within the text ads space, based on a single snapshot at the time of analysis. Due to nature of the paid advertising, it's important to consider how quickly positions change, meaning that fluctuations over the course of the month are to be expected.

Top 5 most featured ad copies: This graph shows the brand text ad copies which featured most, based on a single snapshot at the time of analysis. Due to nature of the paid advertising, it's important to consider how quickly positions change, meaning that fluctuations over the course of the month are to be expected.

Top 10 most featured brands within Shopping ads: This is an overview of the brands which were featured most within the Shopping ads space, based on a single snapshot at the time of analysis. Due to nature of the paid advertising, it's important to consider how quickly positions change, meaning that fluctuations over the course of the month are to be expected.

Top 5 most featured Shopping ad copies: This graph shows the brand Shopping ad copies which featured most, based on a single snapshot at the time of analysis. Due to nature of the paid advertising, it's important to consider how quickly positions change, meaning that fluctuations over the course of the month are to be expected.

Want more?

Greenlight's Data Science & Audience Insights team produce sector reports across a wide range of different online industries. To view and download all free reports, visit: www.greenlightdigital.com/blog

Bespoke Sector Reports

If you can't find a report which analyses the online industry you're interested in or if you want to analyse a specific keyword set, get in touch and find out more about Greenlight's bespoke reports. Greenlight currently creates bespoke reports for a wide range of online brands, providing Marketing teams with the insights they need to make informed decisions about their online strategies in the UK and abroad.

Disclaimer

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