

Digital Marketing Report



New Zealand
Internet Search
Trends and Insights

March 2018





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About Pure SEO



Pure SEO is a Google Premier Partner and New Zealand's leading search engine optimisation (SEO) and search engine marketing (SEM) specialist. Founded in 2009 by Richard Conway, Pure SEO has grown from being a one-man band into this country's largest – and most awarded – specialist search agency.

Providing organic and paid search services and support to hundreds of New Zealand businesses across all sectors has given Pure SEO unique insights into Internet search activities and outcomes in this country, enabling us to compile New Zealand's most comprehensive report into local internet search trends and developments. This information should prove to be invaluable to marketing managers, advertising managers and business owners across the country.

Executive Summary

Search engine marketing (organic and paid) is a highly specialised discipline that is constantly evolving, creating new challenges and opportunities. So much so, that what held true a year ago may no longer be true today. Google regularly changes its algorithms, making it challenging for companies, other than Google partners, to keep abreast of the changes and the resulting impact on their organisation's visibility on the Internet.

Using anonymised data collected from 200 Google Analytics accounts as well as 548 AdWords accounts, Pure SEO has revealed the following insights about how New Zealanders have been engaging with search engines over the past year, and what the coming year's trends are likely to be. This information will help to inform businesses' digital marketing strategies. In summary, our research revealed the following insights for the year 1 January to 31 December 2017:

Website Traffic Insights

- Searches via mobile have started to overtake searches via desktop and tablet.
- Voice is contributing to mobile searches and must be considered when creating web content – Apple's Siri and Google's Assistant are driving this trend.
- Web visits driven by organic searches increased numerically but decreased slightly in proportion to visits via other sources, including paid search, social, referral traffic, direct traffic, etc.
- Social media is increasingly driving traffic to websites.
- Google's dominance in New Zealand continues to rise. This requires businesses to stay up-to-date with Google algorithm updates and to keep their websites well optimised.

Paid Search Insights

- Google Shopping spend is increasing.
- Google's extended text ads (ETAs) have a higher click-through rate than standard text ads. Business still using standard text ads should change to ETAs.
- Google AdWords spend is steadily increasing as businesses incorporate more search advertising into their digital marketing strategy.
- Attaining a higher position for search ads greatly increases Click-Through Rates (CTR).



Google Algorithm Updates in 2017

Google's algorithms are constantly changing, undergoing 500-600 alterations per year. While most of these changes are minor, the search engine occasionally rolls out a major algorithmic update that has a significant impact on business listings. Below, we've outlined the major algorithmic changes that occurred in 2017. While we cannot draw a direct line between any of these algorithm changes and the data contained in this report, this information provides an overview of how the SEO landscape evolved in 2017.

Jan 2017: GOOGLE UPDATE Google Webmasters

Google announced back in August 2016 that it would soon penalise mobile sites that had intrusive interstitials, thereby helping make mobile content more accessible to the user. Examples are pop-ups that cover the main content of a website. This update officially rolled out in January 2017.

Feb 2017: GOOGLE UPDATE Search Engine Land

In February 2017, Google executed an algorithm change that drastically affected the rankings for both mobile and desktop searches. This update is hypothesised to have been based on content and site quality, versus link factors.

Mar 2017: GOOGLE "FRED" UPDATE RankRanger

The 'Fred' update heavily penalised websites that were prioritising aggressive monetisation and ad placements over user experience, reflecting Google's increasing focus on user experience as the ultimate ranking factor.

Jun 2017: GOOGLE UPDATE RankRanger

June saw high volatility levels for websites ranking between positions 6 to 10. Although no probable cause could be traced, the hospitality, retail, and travel industries were most affected, especially towards the bottom end of the search engine results page.

Oct 2017: GOOGLE UPDATE Google Webmasters

In October, Google announced that local results were being made more accessible through country code top-level domains (ccTLD) such as google.co.nz. This means we are now being served country results by default according to our respective locations. Although great for providing relevant, local search results, this update caused some controversy as it had big implications on international search results.

Dec 2017: MACCABEES UPDATE Search Engine Journal

In Dec 2017, there was a reported flux in page rankings due to a core update to Google's algorithms. It was not one major update, but a series of minor improvements to the search algorithm. Google routinely makes core updates to its algorithm to improve relevancy for search results, thereby changing ranking signals for certain sites. The biggest factor that affected page rankings seems to have been the lack of authority and relevancy from on-page or off-page signals.

Mobile Search is on the Move



Trend: Google searches worldwide are increasingly being conducted via mobile phones, prompting Google to shift its indexing towards mobile use. In 2016, Google announced that it was beginning to test its **mobile-first index**, a major overhaul of its algorithms which would primarily use the mobile version of a site's content to rank pages from that site – even in desktop search results. Many in the search engine marketing community expect the mobile-first index to officially roll out this year.

New Zealanders are following the global mobile search trend with a 39.6% increase in mobile phone searches from January of 2016 to December 2017. As can be seen in Figure 1, 2 and 3 below:

- 1.** New Zealanders' Google searches via mobile phones are about to overtake searches on desktops and tablets.
- 2.** There has been a clear and steady increase in mobile sessions for 2016 and 2017, with an observed average increase of 34.7% of mobile usage from year to year.
- 3.** Tablet and desktop sessions have decreased this year by 4.9%.

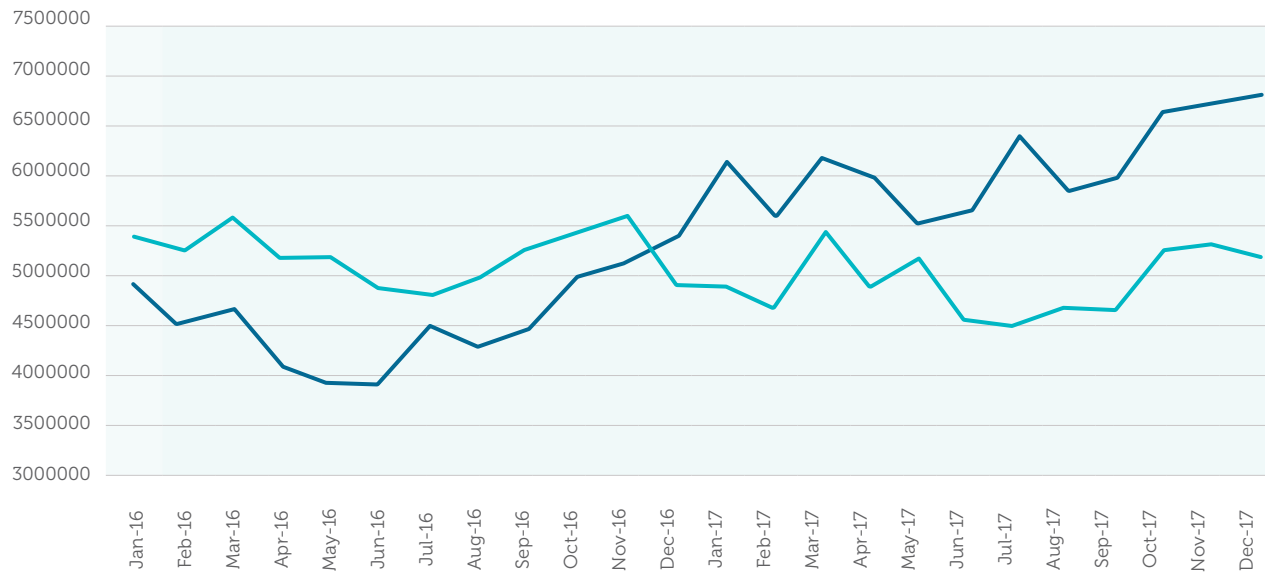


Figure 1: Mobile vs Tablet & Desktop Search Sessions Over the Past 2 Years

Sessions Mobile: — Sessions Tablet & PC: —



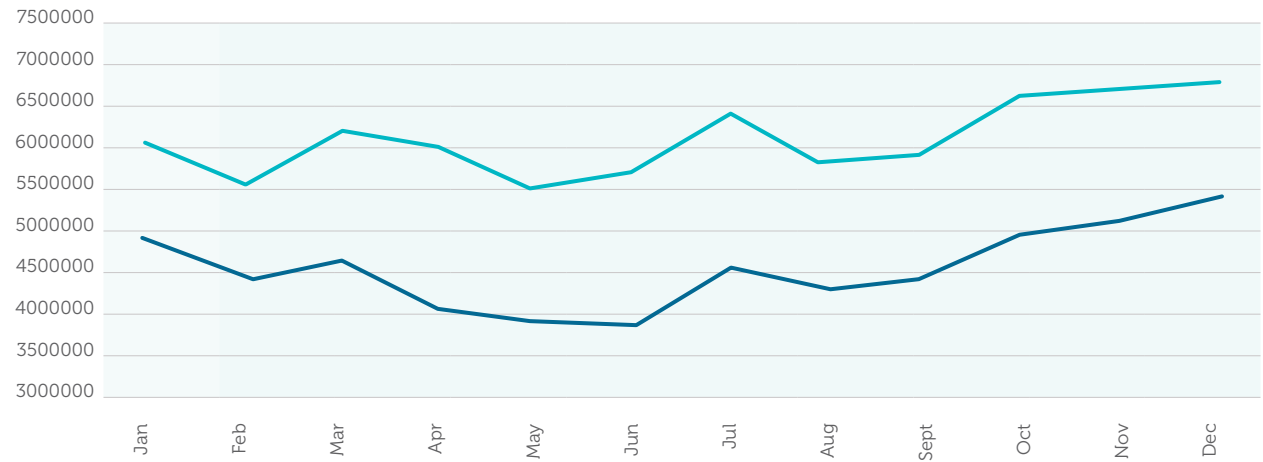


Figure 2: Mobile Session Month by Month

2016 Mobile Sessions: — 2017 Mobile Sessions: —

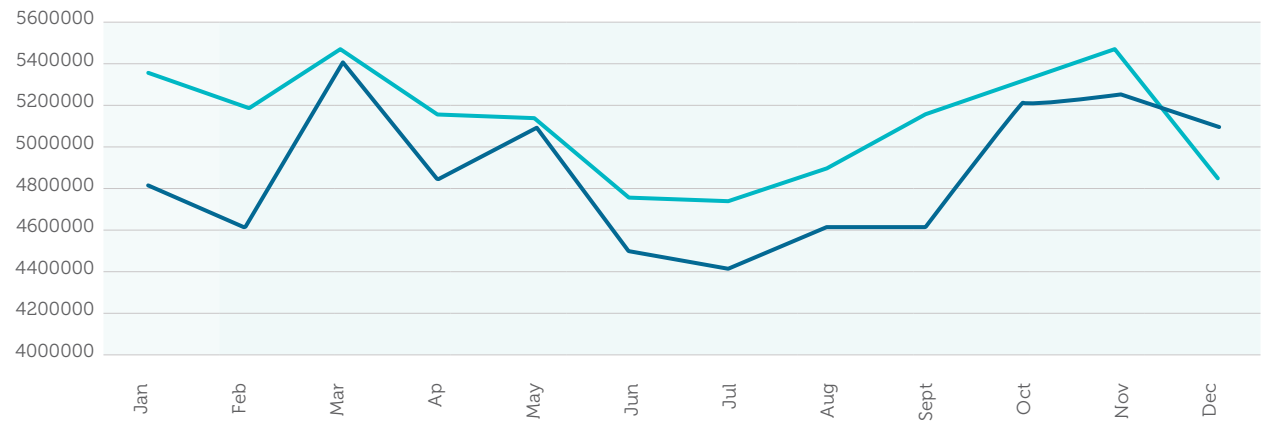


Figure 3: Desktop & Tablet Session Month by Month

2016 Desktop/Tablet Sessions: — 2017 Desktop/Tablet Sessions: —



Causes: The increasing popularity of smartphones is likely a major contributing factor to the rapid growth of mobile search. According to the Google Consumer Barometer (2015), 88% of people in New Zealand use a smartphone, and that number has likely increased.

Another possible influencing factor is the rise of voice search. Hands-free voice control interfaces such as Google Assistant and Apple's Siri make searching with smartphones easier and more convenient. For example, simply asking a smartphone a question such as: "What's the best restaurant near me?" will bring up a list of local restaurants. According to Google, around 20 to 25 percent of queries on the mobile app and on Android devices are now conducted through voice search.

Recommended responses for business owners and marketers: With mobile search sessions on the rise, and with Google's

mobile-first index just around the corner, websites now must be optimised for mobile search if they are to be found by potential customers. Google has helped make mobile optimisation easier with its roll-out of the AMP project and its offer of a variety of website testing tools to diagnose and report a website's mobile performance. While there are several ways to optimise a website for mobile, Google recommends implementing a responsive web design – this renders website display based on any device's screen size while keeping the same URL and HTML code.

Voice search on mobile is on the rise, so it is vital to consider voice search when writing online content or building an online presence. Optimisation tips include writing natural and conversational copy, creating a frequently asked questions page, and claiming your Google My Business listing (since many voice searches are local in nature).

Organic Traffic is Increasing Overall, but Declined Slightly Relative to Other Sources

There are two types of search results: organic and paid. Organic search results are free listings that appear on a search engine results page (SERP) based on the websites' relevancy to the user's search. Non-organic search results are paid advertisements that operate on a pay-per-click (PPC) basis; that is, businesses pay every time a user clicks on their advertisement.

In addition to organic search and paid search, other sources that can drive traffic to a website include social media, links from other websites (referral traffic), and direct visits.

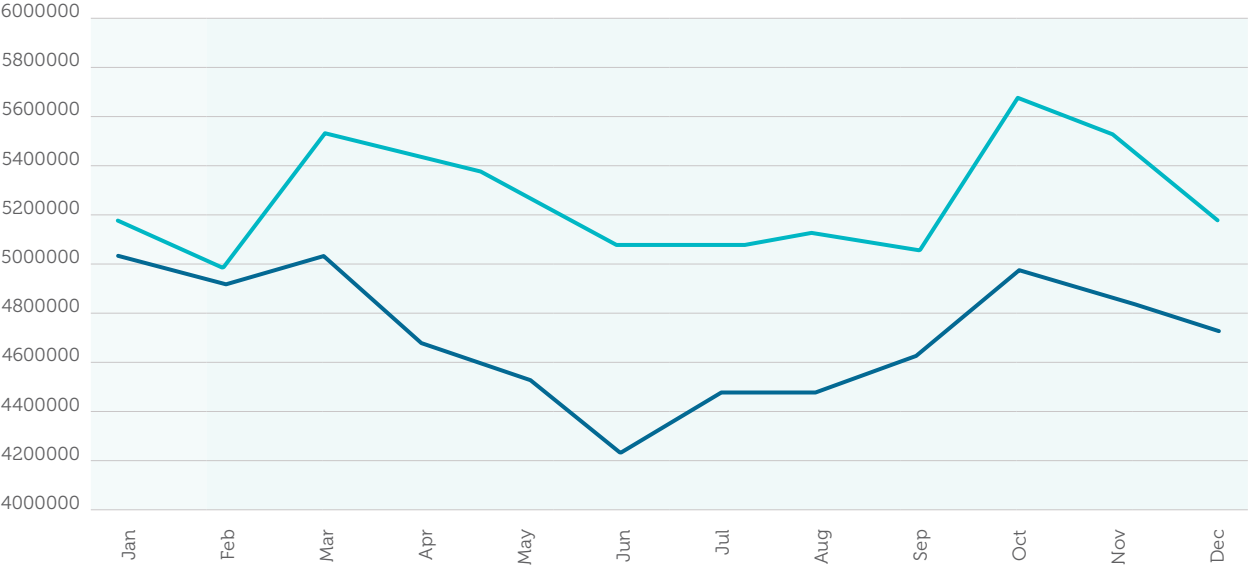


Figure 4: Organic Sessions Month by Month

2017 Organic Sessions: — 2017 Organic Sessions: —

However, as observed in Figure 5 below, organic traffic share has more recently dipped in comparison to other sources. That is, the percentage of organic traffic relative to all sessions has slightly decreased since last year from an average of 48.46% to 48.26%.

Comparisons of sessions from all traffic sources year over year (Figure 6) shows ongoing overall traffic growth, with 23% more sessions in 2017 compared to the previous year. This trend, coupled with increased organic search traffic (Figure 4), shows that organic traffic losses (as a percentage of overall traffic) are marginal relative to overall session gains.

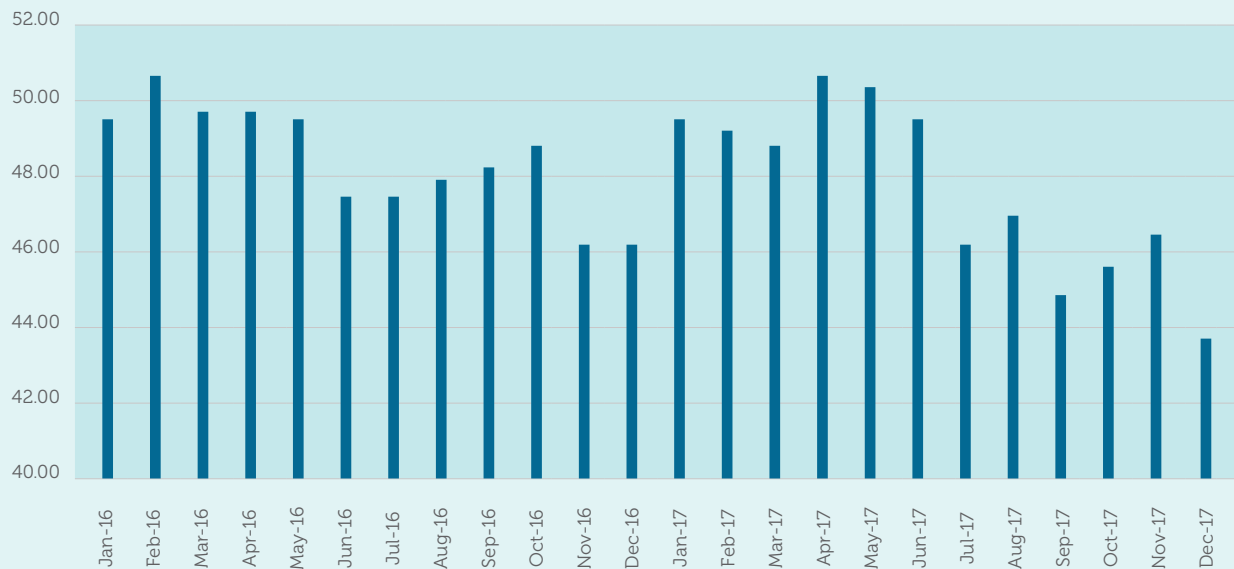


Figure 5: Percentage of Organic Search Share Over the Past 2 Years





Causes: This slight decreasing trend can be partly attributed to more paid advertisements appearing on top of search engine results pages. It is now more common to see four PPC ads instead of three, with organic search results appearing underneath.

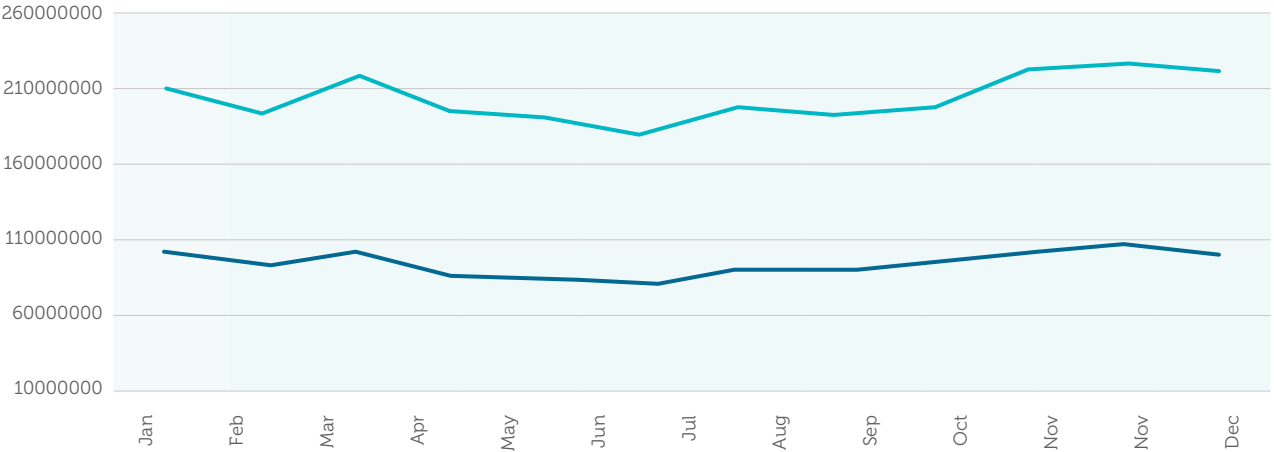


Figure 6: Overall Website Sessions in New Zealand Month by Month

2016 Website Sessions: — 2017 Website Sessions: —

Another likely factor for this decreasing trend is the launch of Google Shopping in New Zealand in February 2017. Google Shopping campaigns create Product Listing Ads (PLAs) that appear on search results pages. A PLA essentially acts as an e-commerce extension for product inventories, showing details of a product (including a photo, price and store name) on a SERP. Clicking on these photo ads takes users to the advertiser's website.

Towards the middle of 2017, Google Shopping campaigns increased in popularity, affecting organic search results. A sharp decline can be seen in December, as more retailers take to the online market to compete for ad visibilities, further reducing organic search sessions.

At the same time, mobile ads have also expanded in size, pushing organic results further down on a mobile screen. Most mobile search results now show Google Shopping ads as well as PPC ads, requiring

extra scrolling to view organic results. All these factors taken together help explain the decrease in organic traffic share (even while organic traffic as a whole has increased).

Recommendations: Although PPC is fast and effective, organic traffic gained by a good SEO campaign has its own benefits. Most businesses prefer organic traffic because it is cheaper and because it has enduring benefits in that the well optimised websites will continue to enjoy good search results even after PPC advertising is stopped.

To promote organic visibility and combat potential losses in organic traffic share, businesses should optimise their websites for organic search by regularly posting web and social media content and engaging in an ongoing SEO campaign.





Google is King

Trends: New Zealanders have long preferred Google as their primary search engine platform – a trend that continued over the past year. 97% of Kiwi searches are now conducted with Google – up 1% from the previous year (Figure 7). Google’s New Zealand search share is significantly higher than the market share Google enjoys in larger countries like the US and the UK.

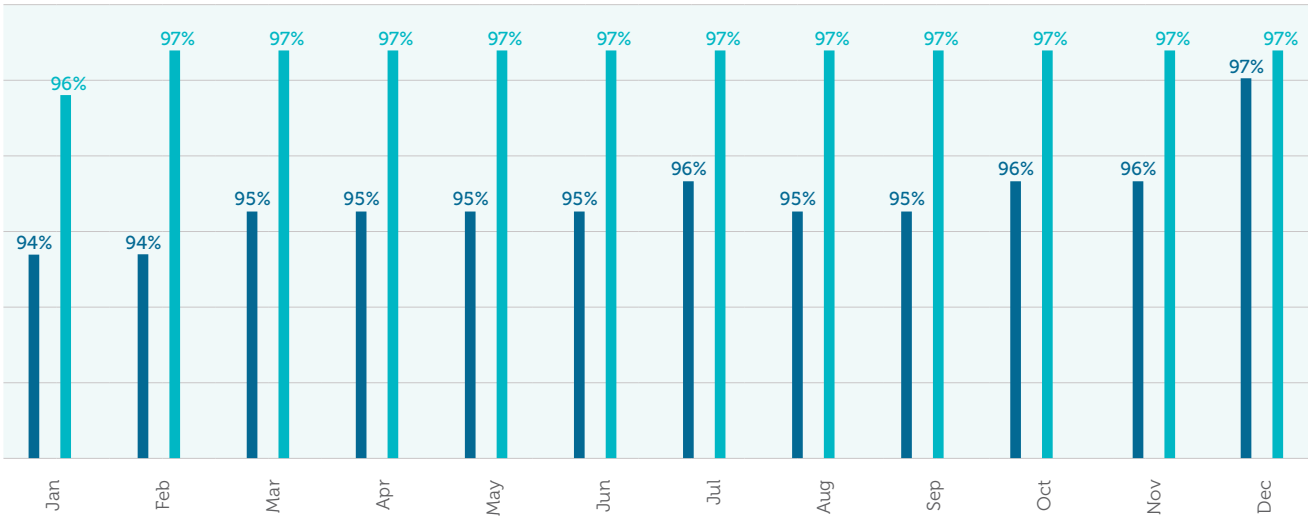


Figure 7: Google’s Search Share in New Zealand

Google Search Share 2016: ■ Google Search Share 2017: ■

New Zealand businesses targeting off-shore customers should take into account that, although Google is the leading search engine provider in the US with 63%, Microsoft still holds a considerable share with 22%, with Yahoo following suit at 11% (Figure 8). In the UK, Google holds 90.34% of the market, with Bing following suit at only 6.25% and Yahoo at barely 2.47% (Figure 9).

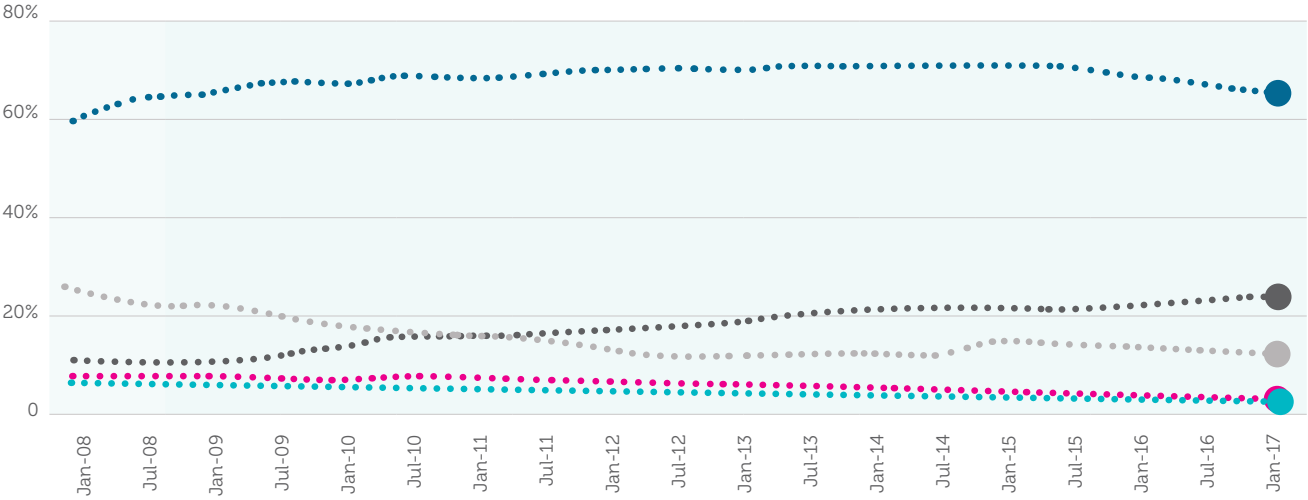
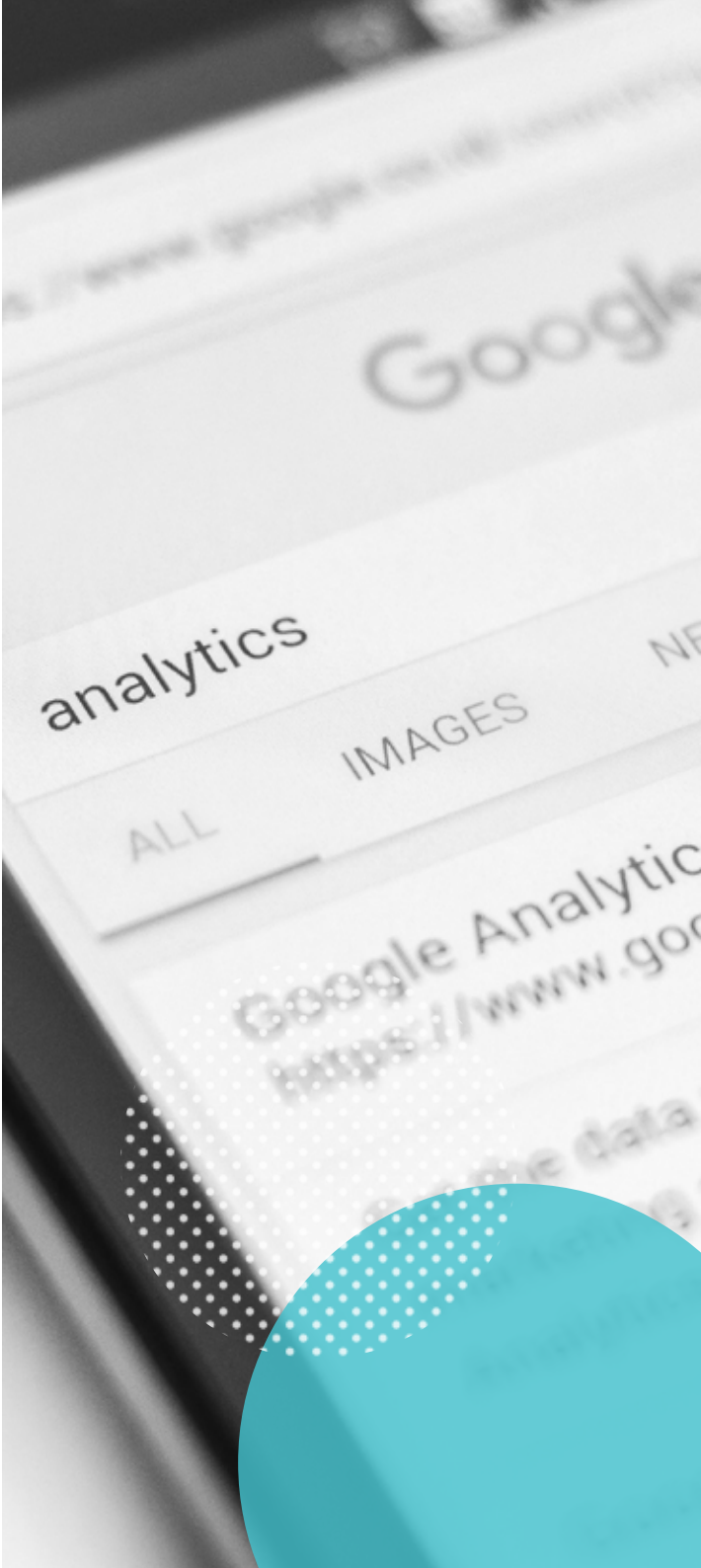


Figure 8: US Search Engine Market Share as of April 2017 (Statista).

Google sites: ●●●● Microsoft sites: ●●●● Yahoo sites: ●●●● Ask Network: ●●●● AOL Inc: ●●●●



Causes: While we cannot say with certainty why Google continues to reign supreme in New Zealand, a likely reason is that its competitors aren't being marketed here as heavily as they are elsewhere. Microsoft continues to have a strong presence in the American market, with their omnipresent operating systems having Bing as the built-in default search engine. Recently, popular internet browser Mozilla Firefox has switched from Yahoo Search to Google Search, so we expect to see a decrease in Yahoo search shares in the foreseeable future.

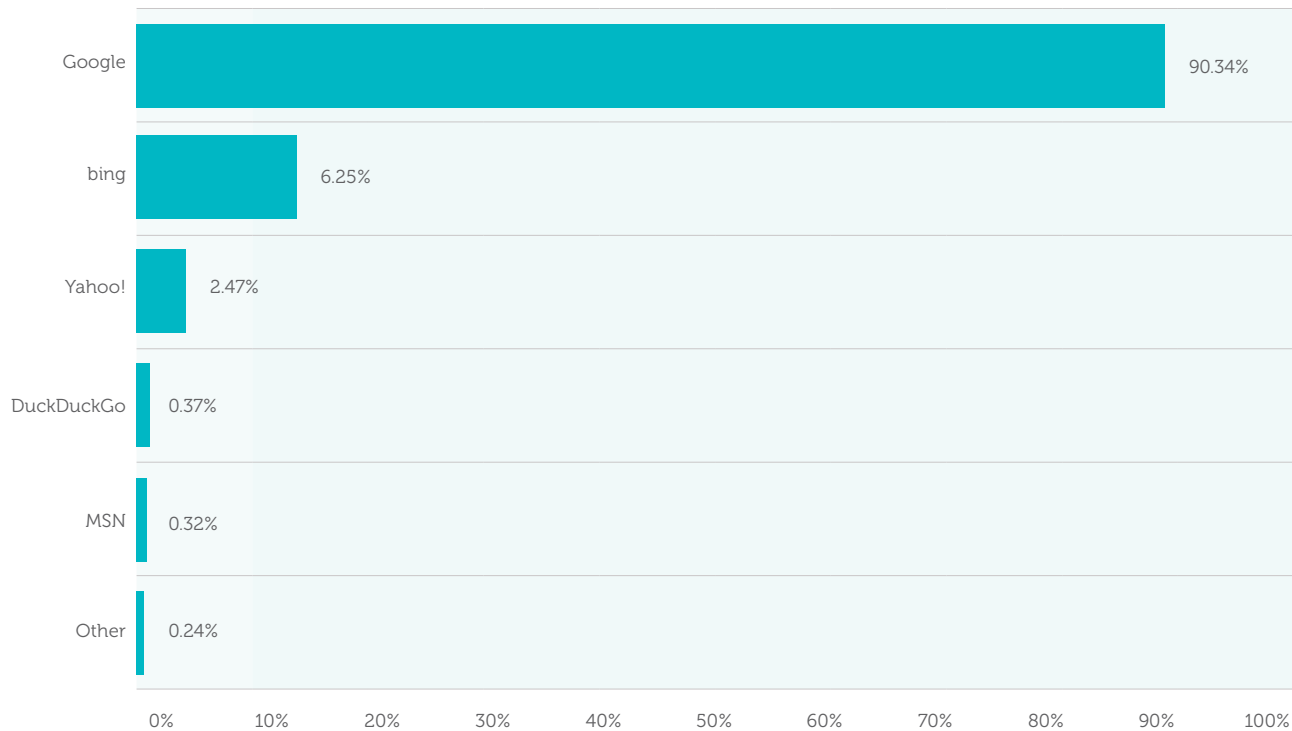


Figure 9: UK Search Engine Market Share As Of July 2017 (Statista)

Recommendations: New Zealand businesses looking to improve their local market share should focus on Google as their main search engine platform. This will require staying up-to-date with Google algorithm updates to make sure their SEO campaigns get the best possible results. It also means using Google AdWords for search advertising.

Those marketing to off-shore audiences should also focus on ensuring their websites are also optimised for Bing and Yahoo. While optimising a website for Bing and Yahoo is similar to optimising a website for Google, both Bing and Yahoo tend to place greater value on backlinks than Google does. That means link building needs to be a crucial aspect of any Bing- or Yahoo-focused SEO campaign. Bing Ads and Yahoo Gemini should also be considered as advertising platforms for marketers targeting the US and UK, in addition to Google AdWords.

Social Media Traffic is on the Rise

Trend: Website visits in 2017 from social sources such as Facebook, Twitter and LinkedIn increased an average of 31.3% over 2016. An estimated 93% of social visits came from Facebook.

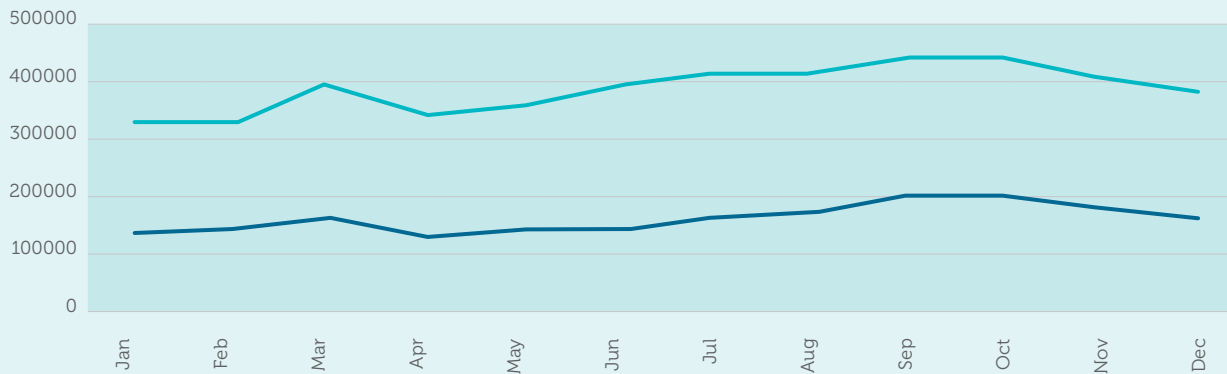


Figure 10: Social Visits to Websites Month by Month

2016 Social Visits: — 2017 Social Visits: —

Causes: A likely contributing factor to the rise in social media traffic is that social media technology is becoming increasingly advanced, attracting more attention from New Zealand businesses. Facebook in particular continues to improve its targetting capabilities, allowing businesses to market straight to their audiences and attract new audiences. We expect the upward trend to continue as more New Zealand businesses discover the power of social media marketing.

Recommendations: Social media marketing is clearly a powerful tool for driving website visits and building brand authority. Although there is no correlation between a strong social media presence and a strong search engine presence, there is high correlation between social signals and ranking position. Digital marketing strategies should continue to include earning authoritative links from external websites, building a loyal audience, and boosting brand visibility and authority through social media.



Google Shopping Campaigns Perform Best on Mobile

Google Shopping, a platform for e-commerce stores to display product listing ads (PLAs) directly on Google search results, launched in New Zealand in February 2017. This development had a huge impact on search behaviour.

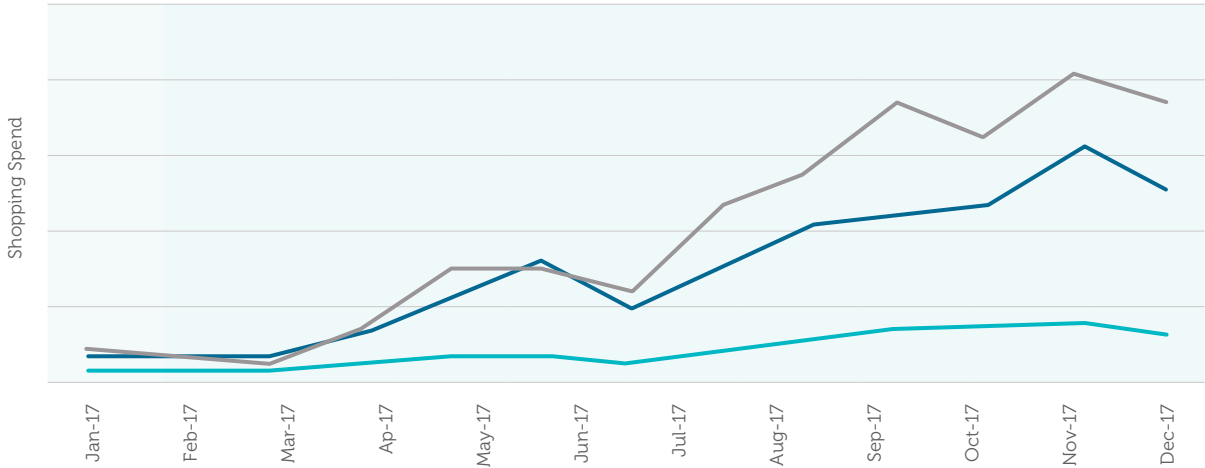


Figure 11: Shopping Campaign Spend by Device

Tablet: — Desktop: — Mobile: —

With Google Shopping, when you search for a product like “laptop computers”, a selection of images and links to laptops for sale, and their prices, will be displayed along with the usual search results – usually at the top of the search engine results page. These product listing ads appear on both desktop and mobile search results, but on mobile devices they are particularly prominent.

Trend: As can be seen in Figure 11 on previous page, product listing advertisements on mobile devices generate 32% higher spend than product listing ads on desktops and 346% higher spend than product listing ads on tablets. Since spend is determined by clicks (an indicator of performance), we can conclude that Google Shopping ads perform better on mobile than on desktop or tablet.

As Google Premium Partners, Pure SEO ran beta versions of Google Shopping for a few client accounts before the official release in February 2017. Shopping campaign spend during this beta period was at the very minimum. Following its official launch in February 2017, Google Shopping Campaigns ramped up in popularity at a very rapid rate, with more businesses competing against each other and increasing their product bids.

Between February and November of this year, mobile shopping expenditure increased by 1173%, reaching the thousands in dollar spend from only hundreds. Desktop spend followed a similar upward trend, increasing by 800% within the same time frame, while tablet spend lagged behind.





Causes: The increasing popularity of mobile search has resulted in Google making PPC advertising more prominent on mobile devices. As previously mentioned, ads now occupy most of a mobile screen when performing a search, especially for searches relating to e-commerce. Since product listing ads take up much more of the screen on a mobile device as opposed to a desktop computer or tablet, it is not surprising that Google Shopping campaign spend is highest on mobile devices.

The lack of spend on tablet devices is likely due to tablets not being as ubiquitous as smartphones or desktop computers in New Zealand. Since fewer people own tablets than own smartphones or computers, fewer people are clicking on tablet search advertisements.

The clear dip in shopping spend during the Christmas period seems counter-intuitive considering this is the biggest shopping season of the year. We suspect this decrease can be attributed to the competitive market around this time, when more retailers are vying for visibility and increasing their respective bids. More competition can result in reduced visibility for advertisers with lower budgets, thus reducing ad performance and spend.

Recommendations: Our research indicates that PLAs tend to perform best in mobile search results, so we recommend taking advantage of mobile bid adjustments for

Google Shopping campaigns to maximise ad visibility in the mobile search results. Bid adjustments allow advertisers to tailor their ads; this means Google will show ads more or less frequently based on where, when, and how people search. Mobile bid adjustments allow advertisers bid more aggressively to get their product listing ad placed higher up in the search results for users searching on mobile devices.

Since every business and every product is different, we recommend running product listing ads without any bid adjustments at first to confirm whether or not they perform differently on different devices. Mobile bid adjustments should only be switched on if and when it has been confirmed that the advertisements do, in fact, perform best on mobile devices.

Extended Text Ads (ETAs) Get Higher Click-Through Rates than Standard Text Ads (STAs)

On 31 January 2017, Google launched a new type of text advertisement for Google AdWords – Expanded Text Ads (ETAs). These text ads phased out the Standard Text Ads (STAs) and are designed for optimal performance on all devices, including mobile devices. STAs can no longer be created or modified but they can still be paused or enabled. ETAs greatly support Google’s steady shift towards cross-device marketing and assist businesses to maximise the return on their PPC investments.

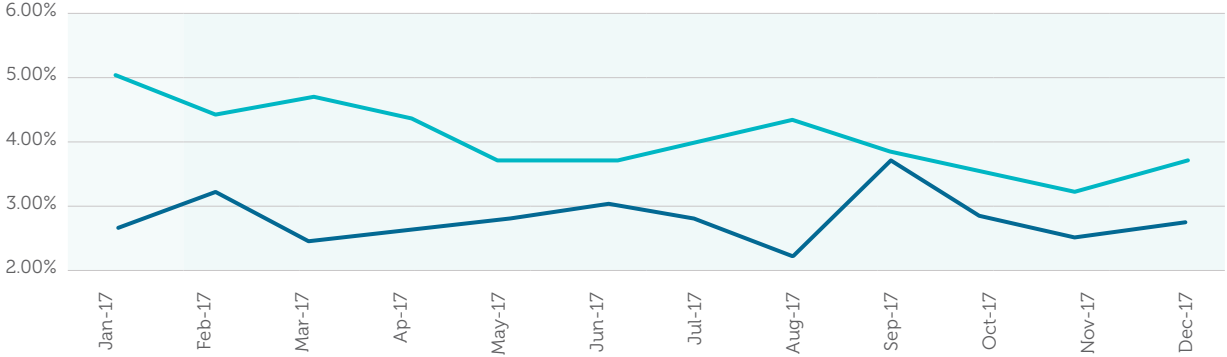


Figure 12: Expanded Text Ad Performance in New Zealand Compared to Standard Text Ad Performance

Standard Text Ads (Old): — Expanded Text Ads: —

ETAs are longer and give advertisers more space for their ad, increasing the standard 25-35-35 character limit to a total of 140 characters. They also feature two headline fields instead of one, a longer description line, and a customisable display URL. These new features provide users with more useful context relating to an advertiser’s products and services.

Trend: As seen in Graph 12 above, businesses still using standard text ads are experiencing lower click-through rates (CTR) compared to those that use the new expanded versions. There is a recent declining trend in ETA text ad performance, with the CTR in December 2017 down to 3.72% from 5.04% in January 2017, but on average ETAs still perform 1.24% better than their counterpart.

Causes: ETAs are longer and command more visual attention than STAs, making them more difficult to ignore and more enticing to click on. For this reason, we are not surprised to see such a large difference in click-through rates between these two types of ads. Higher click-through rates also mean more money for Google, so it is unlikely the search engine will be bringing back STAs any time soon.

Recommendation: On average, ETAs perform 1.24% better than their counterpart, and therefore should be an adapted strategy for all AdWords campaigns. Business is still using STAs should consider pausing their old ads for good and switching to ETAs.



Google Ad Spend is Growing

Trend: As can be seen in Figure 13 and 14 below, total Google AdWords spend nearly doubled in New Zealand during 2017, increasing by 42.87%. Similarly, mobile ad spend growth has increased by 49.5% since December 2016, experiencing the most rapid growth among devices. Since ad spend is driven by clicks, this means that more people are clicking on mobile ads – an unsurprising finding given the overall growth in mobile search behaviour observed earlier.

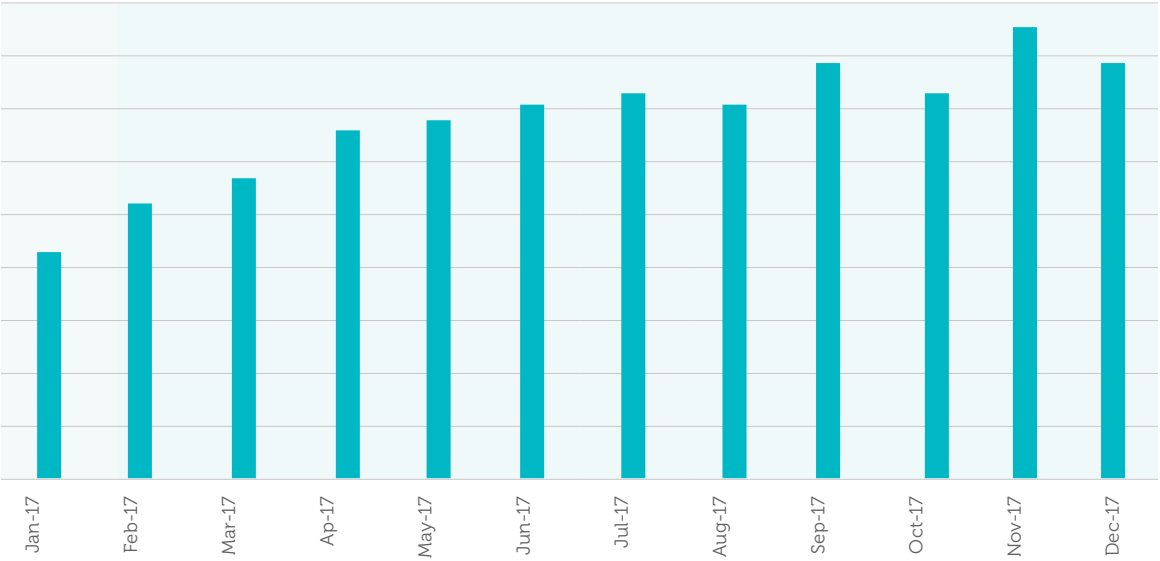
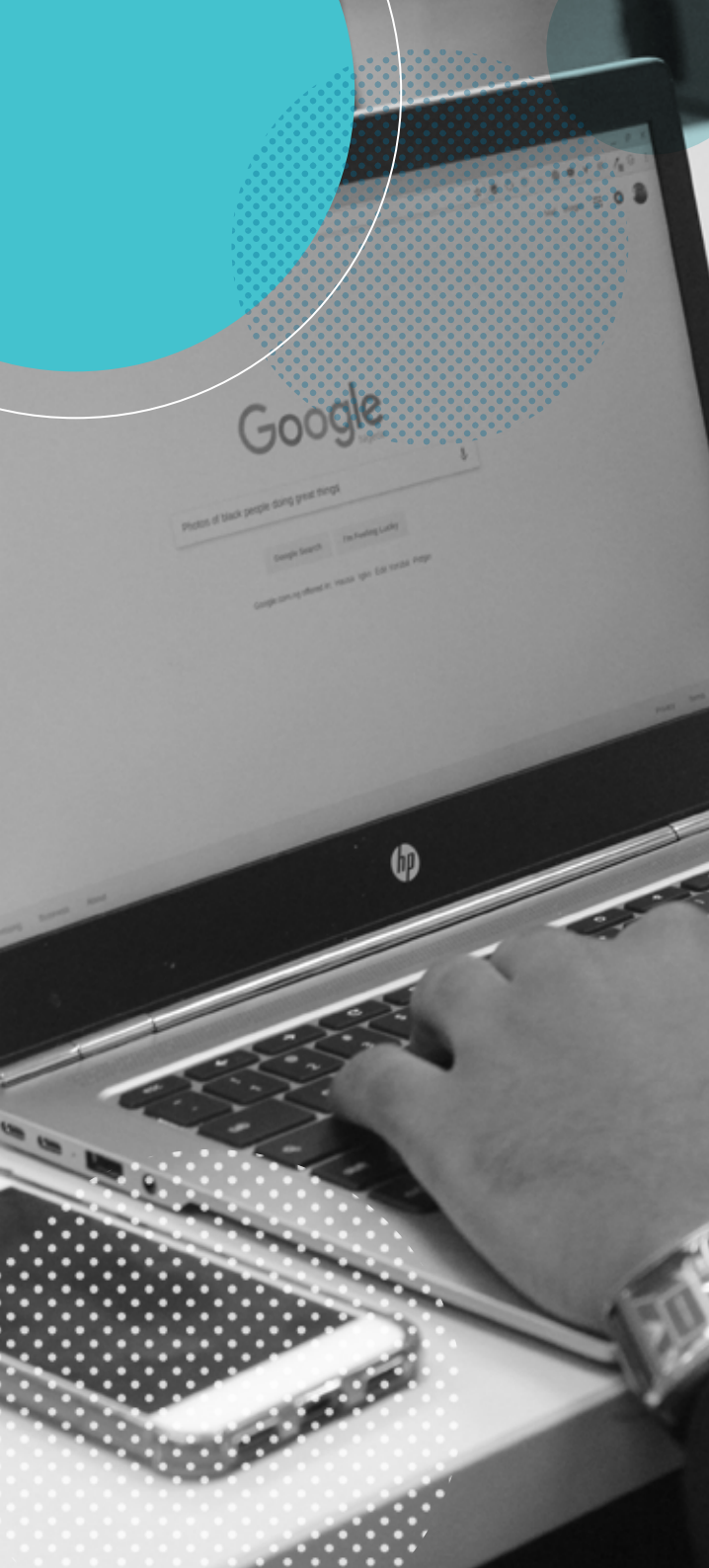


Figure 13: Total Google Ad Spend Growth in New Zealand During 2017





Google essentially killed single-device targeting in 2013 with the introduction of enhanced campaigns; however, it is possible to target mobile devices more aggressively in paid search advertising by making mobile bid adjustments. Targetting mobile device users more aggressively than desktop users (or vice versa) can make sense if it appears that one's ads perform better on a particular device.

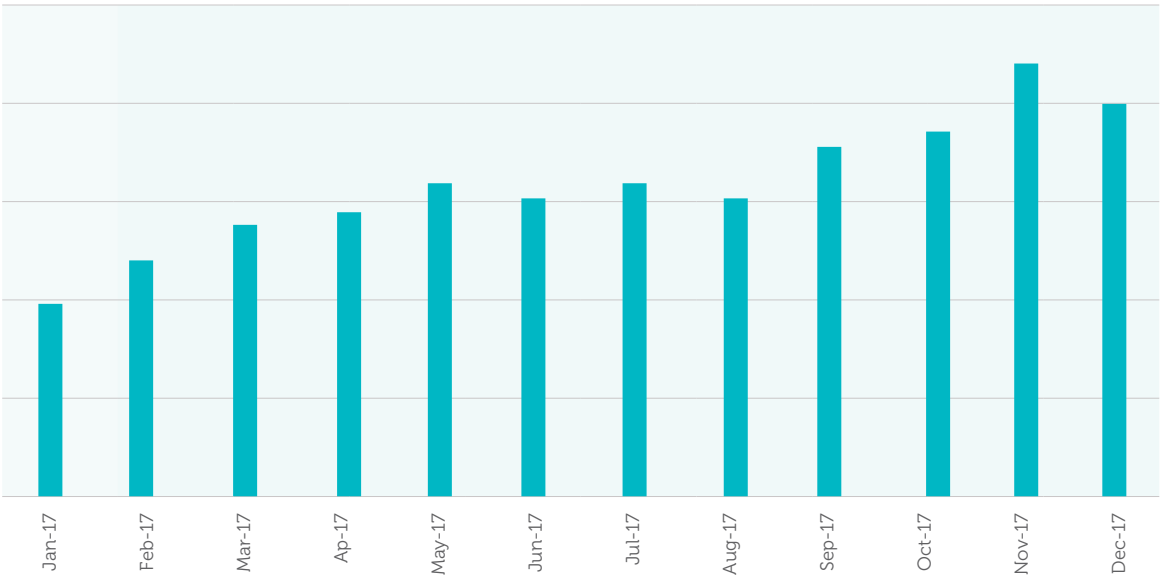


Figure 14: Google Mobile Ad Spend Growth in New Zealand During 2017

Causes: Digital marketing trends across search engine and social platforms (e.g. Facebook) reveal an inclination towards paid advertising routes.

We believe this is due in part to the increasing number of businesses who are becoming internet-savvy, thereby increasing competition in the organic search space and encouraging more businesses to turn to paid search advertising for a quick solution. Compared to unpaid online advertising strategies such as search engine optimisation (SEO), paid search usually allows for a higher level of control, is more easily measurable, and produces faster results.

It is widely-accepted that SEO does not produce instant results; laying out its foundations takes time, patience, and proficiency, yet its effects are long-lasting and don't disappear the moment paid advertising ceases. This makes way for SEO's faster, more causative brother AdWords to do the advertising work with a steeper price.

Recommendations: Starting a Google AdWords campaign is smart and cost-effective; businesses only need to pay if their respective ads are clicked. However, costs can rack up. SEO is still essential to rank well organically and to ensure businesses cover all their online marketing bases.

We recommend that businesses engage in both SEO and AdWords campaigns to maximise their visibility in the search space.



A Higher Ad Position Leads to a Higher Click-Through Rate

Trend: The old adage “location, location, location” (or “position, position, position”) is just as true in search engine marketing as it is in real estate. The higher a business’s advertisement ranks in the paid search results, the better the click-through rate. Attaining the first ad position on a search engine results page gives an average CTR of 7.28%, while second and third positions average 5.11% and 3.68% respectively (Figure 15).

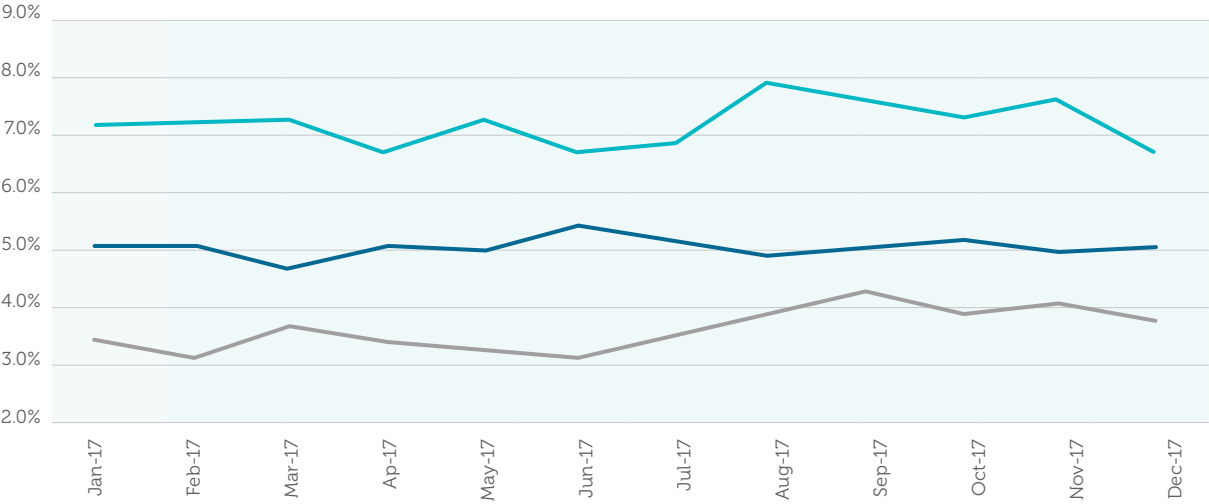


Figure 15: Impact of First Position on CTR

Position 1: — Position 2: — Position 3: —





Cause: This long-standing trend is likely driven by most people wanting rapid results when searching. People also may inherently trust the top result more than lower appearing results because they believe it has been determined to be the most relevant by Google.

Recommendations: The highly-coveted first-ranking search position is determined by each keyword's quality score as well as competition from other advertisers.

Optimising one's first position bid can be done through gaining better Quality Scores; that is, one's ads, keywords and landing pages should complement one another and be of a high quality. This lowers the bid estimate, helping one to cost-effectively reach that first position. If one's advertisements are suffering from low Quality Scores, then consider adjusting the ads, keywords and landing pages to make sure they are all aligned with one another.

Adding extensions to advertisements will also make them more targeted, relevant, and clickable, all good characteristics that will help them be found on the top of the search results page.

Advice for Marketers, Advertisers and Business Owners

As seen in the results above, the organic and paid search landscapes are constantly evolving. The following advice will be useful for informing digital marketing strategies over the coming year:

Optimise for mobile

Increasingly, users are searching with their mobile phones and Google has responded to this trend through algorithm updates and new features (e.g. Extended Text Ads) that reward websites delivering a mobile-centric experience. It is now more essential than ever to optimise SEO and AdWords campaigns for mobile by adopting a responsive design, improving the website's page loading speed, and optimising web content for local-intent and long-tail keywords.

Respond to Google updates

Most New Zealanders search with Google, so be sure to keep abreast of Google updates and react accordingly. Staying up-to-date on the latest Google ranking algorithm changes will help businesses adjust their SEO and

PPC campaigns to get the best results, and to maintain or improve ranking positions.

Selling products? Consider Product Listing Ads (PLAs)

Google has been steadily implementing new ways of seamlessly integrating paid results onto search engine results pages (SERPs) through AdWords and Shopping campaigns, slowly overpowering organic search results. This is especially true for mobile results, as mobile devices have smaller screens and accommodate a more limited amount of search results compared to desktop or tablet counterparts.

If they have not done so already, then E-commerce businesses are strongly advised to consider product listing ads to get their products to appear on SERPs.

Optimise for user experience

There is increasing competition for organic and paid search so now, more than ever, digital marketers should be focussing attention on delivering an optimal user experience – particularly for those searching on mobile devices. Google's increasingly sophisticated algorithms identify and reward (through good rankings) sites that deliver a great user experience. That means websites should load quickly and be easy to navigate.

Invest smartly

Adopting a smart digital marketing strategy is essential for getting top results and achieving the best possible ROI on organic and paid search rankings. Organic rankings require long-term investment but achieve lasting results, while sustaining a first-position advertising rank will gain quick

clicks but rapidly rack up costs. Sticking to a budget aligned with specific goals will help businesses stay on top of digital marketing expenditures, whether that is achieved through organic or paid campaigns.

Cover all digital marketing bases

Good online marketing strategies should have organic and paid search components that complement each other – i.e. the search marketing strategy should involve a combination of organic, paid search, and (if appropriate) product listing advertisements. Sites optimising for all search channels are well-positioned to capture search traffic regardless of changes to the SERPs. This means that, if SEO growth slows, then Google product listing advertisements and paid search advertisements still have the business covered. In other words, there is no magic bullet so provide cover the business for all possibilities!

Don't try to manipulate the system

Google's continuous algorithm updates have made it more difficult to game the system and get higher organic rankings without earning them. Websites engaging in such tactics will swiftly be discovered and punished by Google. It is therefore important to engage in SEO strategies that abide by Google's guidelines and use ethical, 'white-hat' tactics to gain organic visibility the correct way. Spammy, 'black-hat' SEO tactics didn't work in 2017 and they certainly won't work in 2018.

Glossary

Search Engine Optimisation (SEO): the practice of increasing the quantity and quality of traffic to a website through organic search engine results.

Pay-per-click (PPC): a digital marketing model where advertisers pay a fee every time their ads are clicked.

Cost-per-click (CPC): the amount paid for each click in a PPC marketing campaign.

Interstitials: Web pages (or pop-ups) that display before or after an expected content page, often to display advertisements or confirm the user's age before showing age-restricted material.

Extended text advertisements (ETA): longer, more controllable messaging in ads.

Search engine results page (SERP): the web page displayed by a search engine in response to a search query.

Product Listing Ads (PLAs): CPC ads that feature a product image and its price. These are tailored towards products and product categories.

