# Digital Deck 9 – Web-traffic and Search

DRAFT

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# Peer 4 is the leading brand of Peer 1 but facing tough competition from Peer 9; opportunity in improving search marketing for all Peer 1 brands

SUMMARY

/DIRECTIONAL

| | | | Target | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | Peer 4 | Peer 1 | Peer 2 | Peer 5 | Peer 7 | Peer 3 | Peer 6 | Peer 9 | Peer 8 | Peer 11 | Peer 10 | Peer 12 |
| Website | | Total visits - monthly average – *Apr'24 to Mar'25 (K)* | 6.2 | 3.0 | 4.0 | 1.8 | 1.5 | 1.3 | 0.9 | 6.1 | 1.6 | 2.2 | 0.9 | 2.2 |
| | | Total visits - annual average – *Apr'22 to Mar'25 (K)* | 52.1 | 15.2 | 52.8 | 15.9 | 8.1 | 11.2 | 13.6 | 74.1 | 16.4 | 20.3 | 5.8 | 22.1 |
| | | YoY change in total visits | 90% | 287% | 33% | 63% | 550% | -10% | 22% | -5% | 133% | 34% | 87% | 75% |
| | | Unique visitors - monthly average – *Apr'24 to Mar'25 (K)* | 2.9 | 1.6 | 2.1 | 0.9 | 0.7 | 0.5 | 0.4 | 2.7 | 0.8 | 1.0 | 0.4 | 1.1 |
| | | Unique visitors - annual average – *Apr'22 to Mar'25 (K)* | 23.0 | 7.9 | 27.5 | 8.2 | 4.3 | 5.5 | 6.8 | 37.2 | 8.8 | 10.9 | 2.9 | 11.6 |
| | | YoY change in unique visitors | 104% | 276% | 27% | 37% | 351% | -36% | -8% | -27% | 95% | 18% | 82% | 54% |
| | Traffic Sources | Direct visits | 26% | 51% | 42% | 30% | 29% | 38% | 62% | 47% | 41% | 32% | 42% | 34% |
| | Traffic Sources | Search (organic + paid) | 65% | 36% | 30% | 56% | 56% | 50% | 25% | 45% | 25% | 52% | 42% | 55% |
| | Traffic Sources | Social media | 7% | 9% | 8% | 9% | 10% | 7% | 6% | 4% | 7% | 9% | 7% | 7% |
| | Traffic Sources | Display ads | 0.2% | 0.2% | 5% | 0.4% | 0.4% | 0.4% | 0.3% | 0.4% | 0.3% | 0.3% | 0.6% | 0.3% |
| | Traffic Sources | Referrals | 3% | 4% | 16% | 5% | 4% | 4% | 7% | 4% | 26% | 7% | 8% | 4% |
| | Traffic Sources | Others, such as email | 0% | 0% | 0% | 0% | 0% | 0% | 0.1% | 0% | 0% | 0% | 0.1% | 0% |
| | | Pages per visit | 1.4 | 1.8 | 1.7 | 2.4 | 3.9 | 4.6 | 1.6 | 2.3 | 2.1 | 2.2 | 3.2 | 2.0 |
| | | Avg. visit duration *(minutes)* | 0.6 | 0.6 | 0.7 | 2.1 | 4.3 | 5.3 | 0.6 | 1.9 | 1.0 | 1.0 | 2.3 | 1.1 |
| | | Bounce rate | 77% | 53% | 63% | 43% | 41% | 39% | 63% | 45% | 61% | 47% | 48% | 56% |
| SEO/ SEM | SEO | # keywords website ranks in top 100 results for *(K)* | 2.7 | 0.6 | 0.6 | 0.8 | 0.4 | 0.2 | 0.1 | 7.6 | 0.5 | 0.9 | 0.3 | 0.6 |
| | SEO | Organic traffic (indexed with 100=max) | 33 | 11 | 8 | 9 | 6 | 3 | 2 | 100 | 9 | 37 | 3 | 5 |
| | SEM | Cost per Click ($) *(last 30 days)* | - | - | 6.8 | - | - | - | - | 6.4 | - | - | - | - |
| | SEM | Paid search traffic (indexed) *(last 30 days)* | - | - | 16 | - | - | - | - | 100 | - | - | - | - |
| | SEM | Paid search spend (indexed) *(last 30 days)* | - | - | 17 | - | - | - | - | 100 | - | - | - | - |

*Lagging* ← → *Leading*

Source: SimilarWeb, SEMRush

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# **Unique Visits:** Peer 4 leads on scale with a strong YoY growth; closest non-Peer 1 competitor is Peer 9

WEB-TRAFFIC | UNIQUE VISITS

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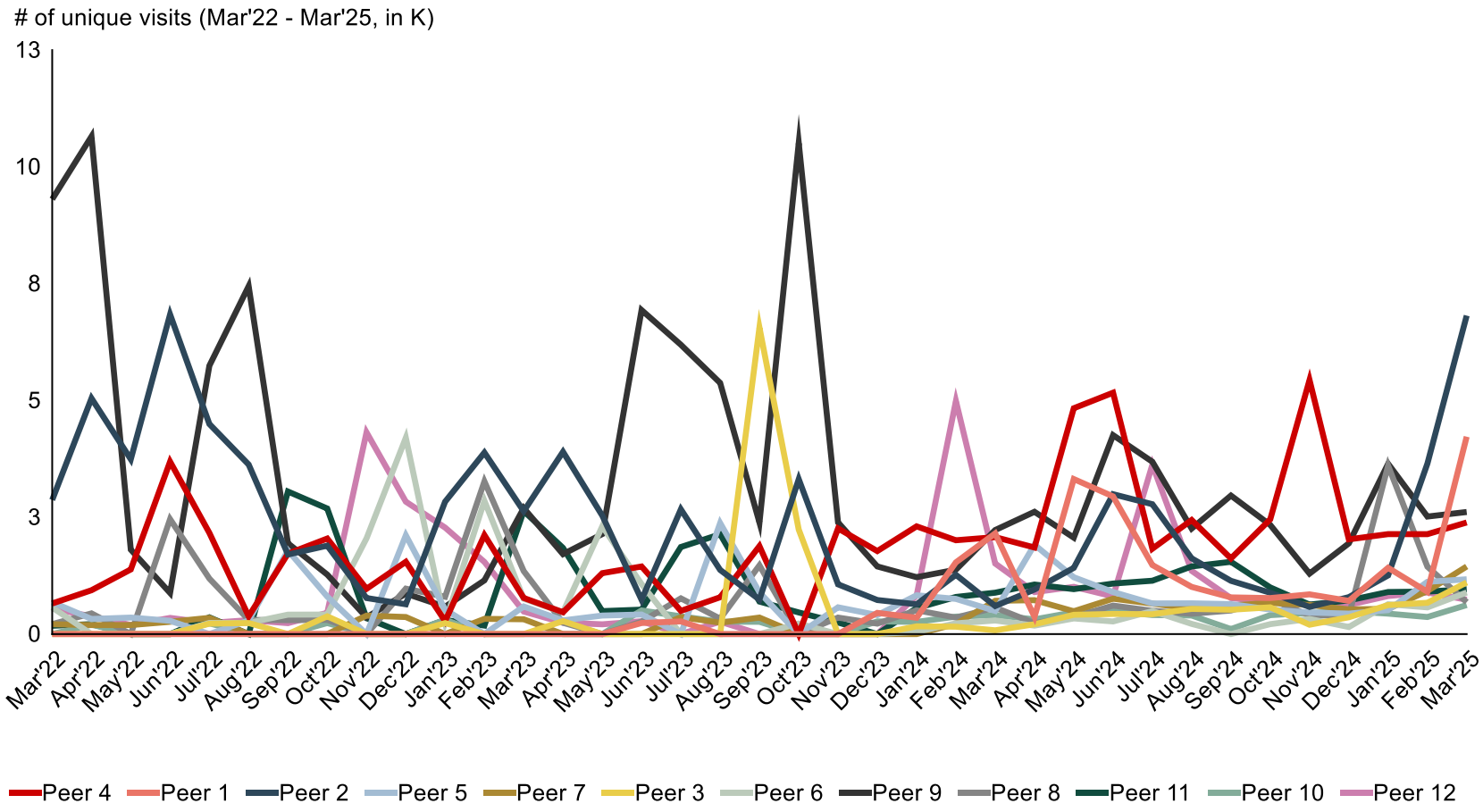


| | | Avg. Unique Monthly Visitors (K, LTM) | Change YoY | Visits per Unique Visitor |
|---|---|---|---|---|
| Target | **Peer 4** | **2.9** | ***104%*** | ***2.2*** |
| | **Peer 1** | 1.6 | *276%* | *1.9* |
| | **Peer 2** | 2.1 | *27%* | *1.9* |
| | **Peer 5** | 0.9 | *37%* | *2.2* |
| | **Peer 7** | 0.7 | *351%* | *2.2* |
| | **Peer 3** | 0.5 | *-36%* | *2.5* |
| | **Peer 6** | 0.4 | *-8%* | *2.6* |
| Peer 9 | **Peer 9** | 2.7 | *-27%* | *2.3* |
| | **Peer 8** | 0.8 | *95%* | *2.0* |
| Peer 11 | **Peer 11** | 1.0 | *18%* | *2.1* |
| | **Peer 10** | 0.4 | *82%* | *2.2* |
| Peer 12 | **Peer 12** | 1.1 | *54%* | *2.1* |

Note: LTM: Apr'24 to Mar'25; YoY change refers to % change in monthly average no. of unique visits in LTM (Apr'24 to Mar'25) vs. Previous LTM (Apr'23 to Mar'24)
Source: SimilarWeb

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# **Traffic sources evolution:** All the brands seeing a decline in paid-media-generated traffic hinting at reduced paid media investments industry-wide

WEB-TRAFFIC SOURCES

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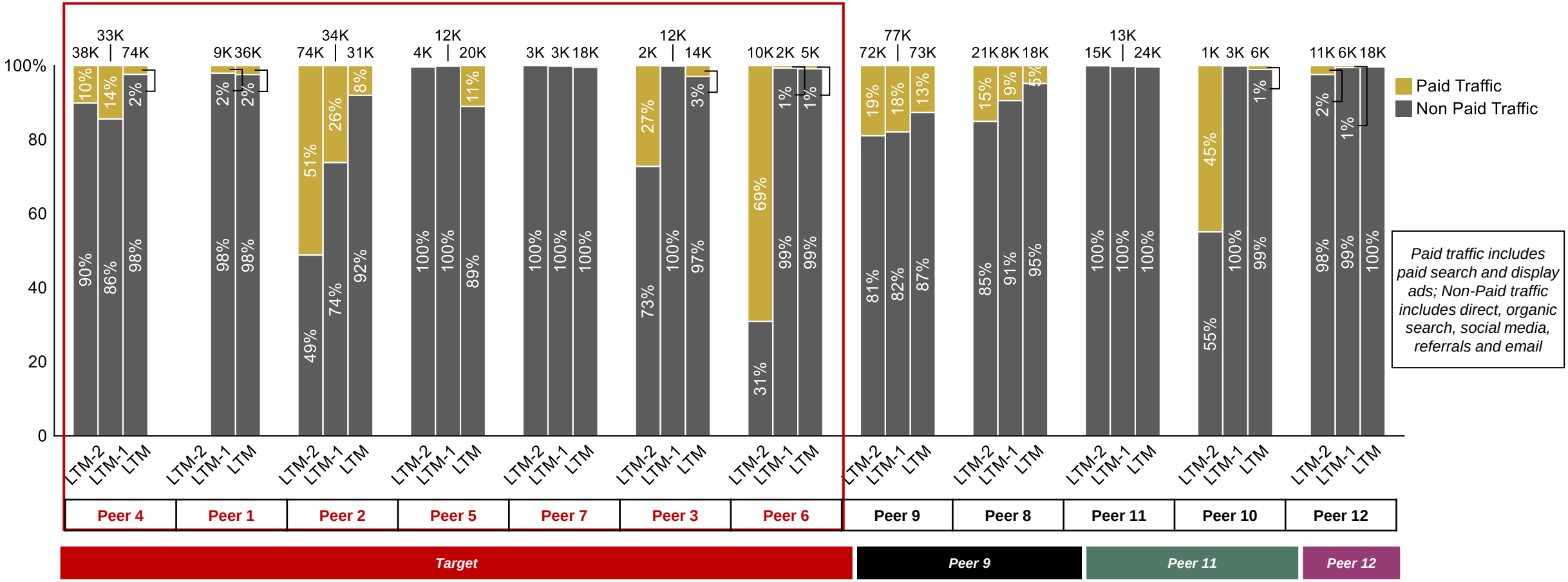
Share % of Paid vs Non Paid Visits (K)




*Paid traffic includes paid search and display ads; Non-Paid traffic includes direct, organic search, social media, referrals and email*

Note: LTM: Apr'24 to Mar'25; LTM-1: Apr'23 to Mar'24; LTM-2: Apr'22 to Mar'23; Bars sorted basis LTM visits
Source: SimilarWeb

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# **Traffic channels:** Similar mix across industry; Direct and Organic search driving more than 80% of the traffic; Social responsible for 5-10%

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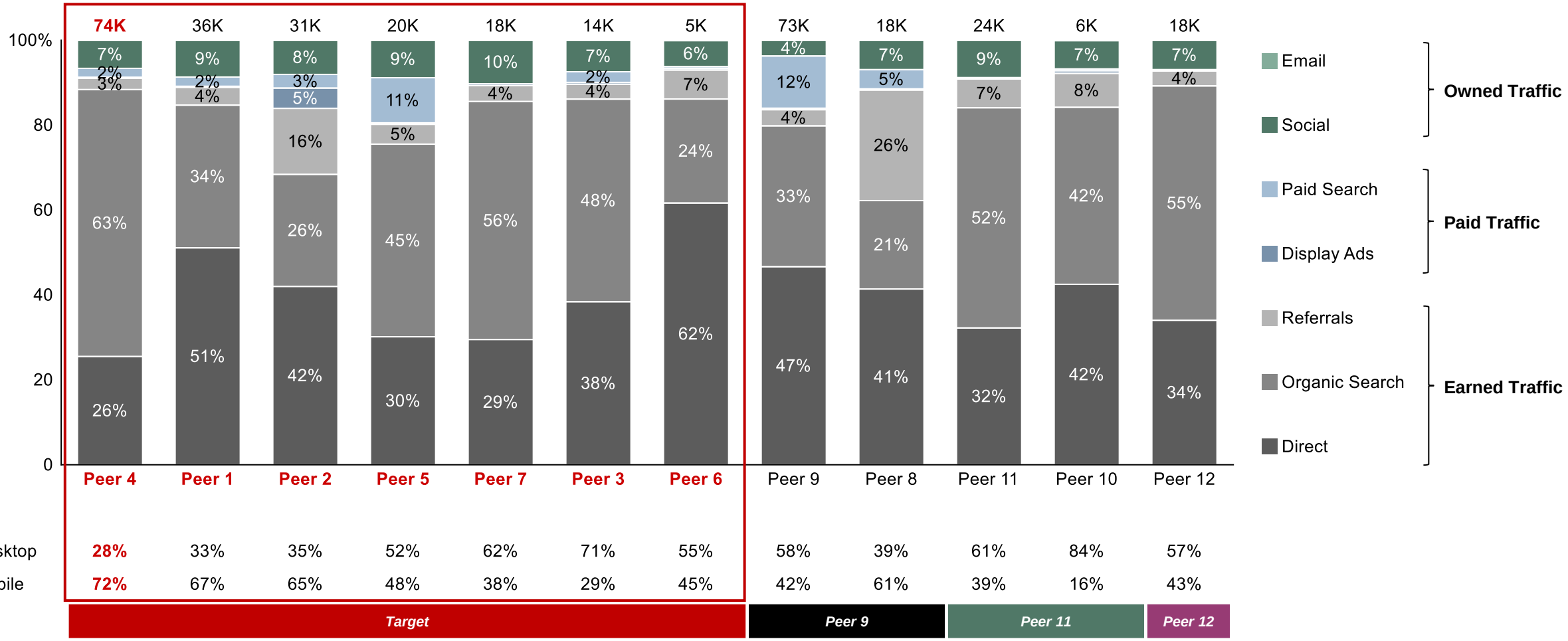
% visits per channel (LTM, Apr'24 - Mar'25)




| | Peer 4 | Peer 1 | Peer 2 | Peer 5 | Peer 7 | Peer 3 | Peer 6 | Peer 9 | Peer 8 | Peer 11 | Peer 10 | Peer 12 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Desktop | 28% | 33% | 35% | 52% | 62% | 71% | 55% | 58% | 39% | 61% | 84% | 57% |
| Mobile | 72% | 67% | 65% | 48% | 38% | 29% | 45% | 42% | 61% | 39% | 16% | 43% |

Source: SimilarWeb

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# **Visitor engagement:** Target brands can enhance user engagement through faster load times, intuitive design, and compelling content strategy

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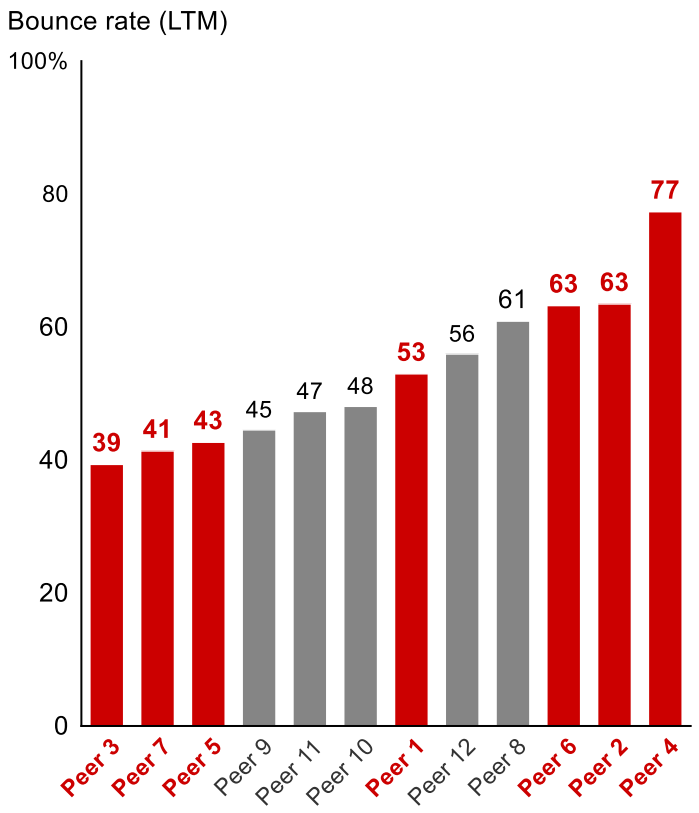
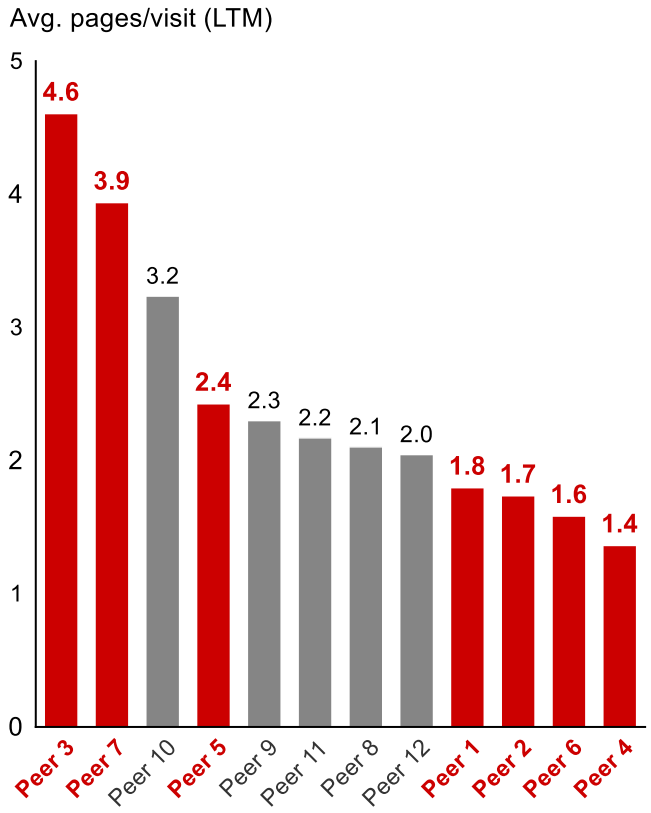
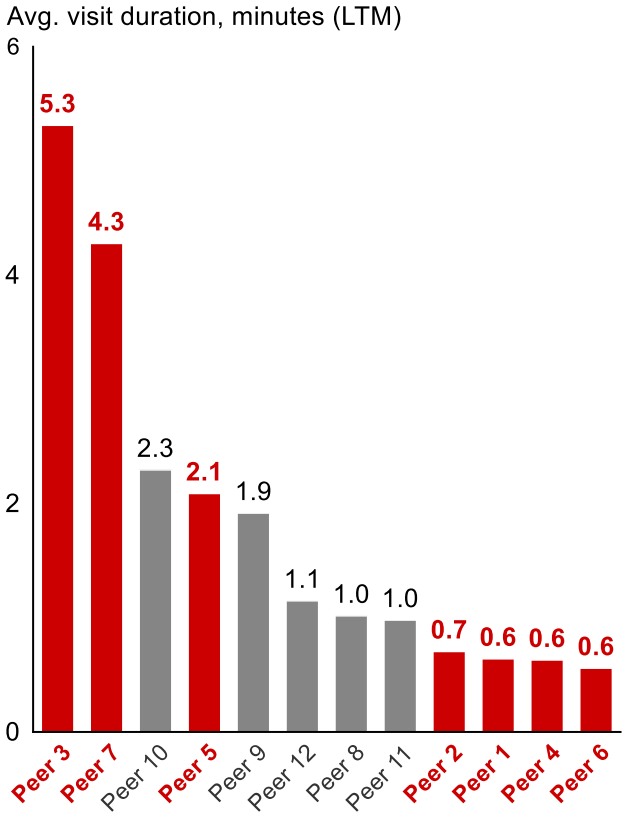
## Bounce rate (lower the better)




## # of pages visited per visit




## Average Visit Duration




Note: LTM is Apr'24-Mar'25
Source: SimilarWeb

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# **Cross-Purchase**: Certain Peer 1 sub-brands have high overlap within each other but limited overlap with competitors; Peer 4 attracts high %age of visitors from sub-brands

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*Reading-aid: Peer 4 and Peer 1 share 'X' number of visitors. That 'X' is 4% of Peer 4's traffic and 7% of Peer 1's traffic.*

**Also visited…**

| Visitors to… | | Target | | | | | | | Competitors |
|---|---|---|---|---|---|---|---|---|---|
| | | Peer 4 | Peer 1 | Peer 2 | Peer 5 | Peer 7 | Peer 3 | Peer 6 | Peer 9 |
| Target | Peer 4 | - | 4% | 0% | 5% | 9% | 6% | 0% | 3% |
| | Peer 1 | 7% | - | 0% | 5% | 8% | 4% | 3% | 8% |
| | Peer 2 | 0% | 0% | - | 0% | 0% | 0% | 0% | 5% |
| | Peer 5 | 13% | 7% | 0% | - | 21% | 12% | 0% | 0% |
| | Peer 7 | 19% | 10% | 0% | 18% | - | 14% | 0% | 5% |
| | Peer 3 | 20% | 7% | 0% | 16% | 22% | - | 0% | 0% |
| | Peer 6 | 0% | 15% | 0% | 0% | 0% | 0% | - | 0% |
| Comps | Peer 9 | 1% | 2% | 1% | 0% | 1% | 0% | 0% | - |

Note: Based on desktop data only; Average %s over LTM (Apr'24 – Mar'25); Website visitors for Peer 11, Peer 10, Peer 8 and Peer 12 had 0% overlap with all other players, hence not shown on the slide | Source: SimilarWeb

1-5% | 6-10% | >10%

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# **Demographics:** Website 9 sees strong engagement from 25–34-year-olds and a balanced gender split; opportunity to strengthen appeal among Gen-Z audiences

WEB-TRAFFIC | DEMOGRAPHICS

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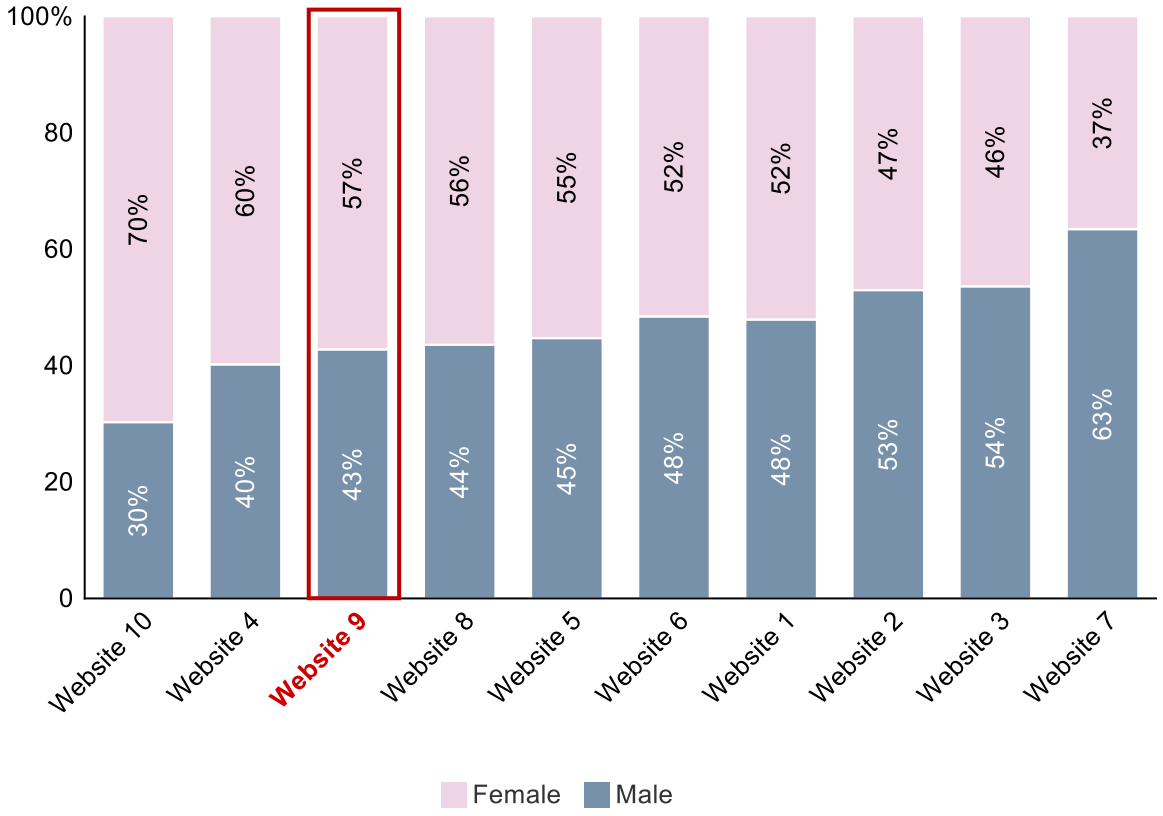
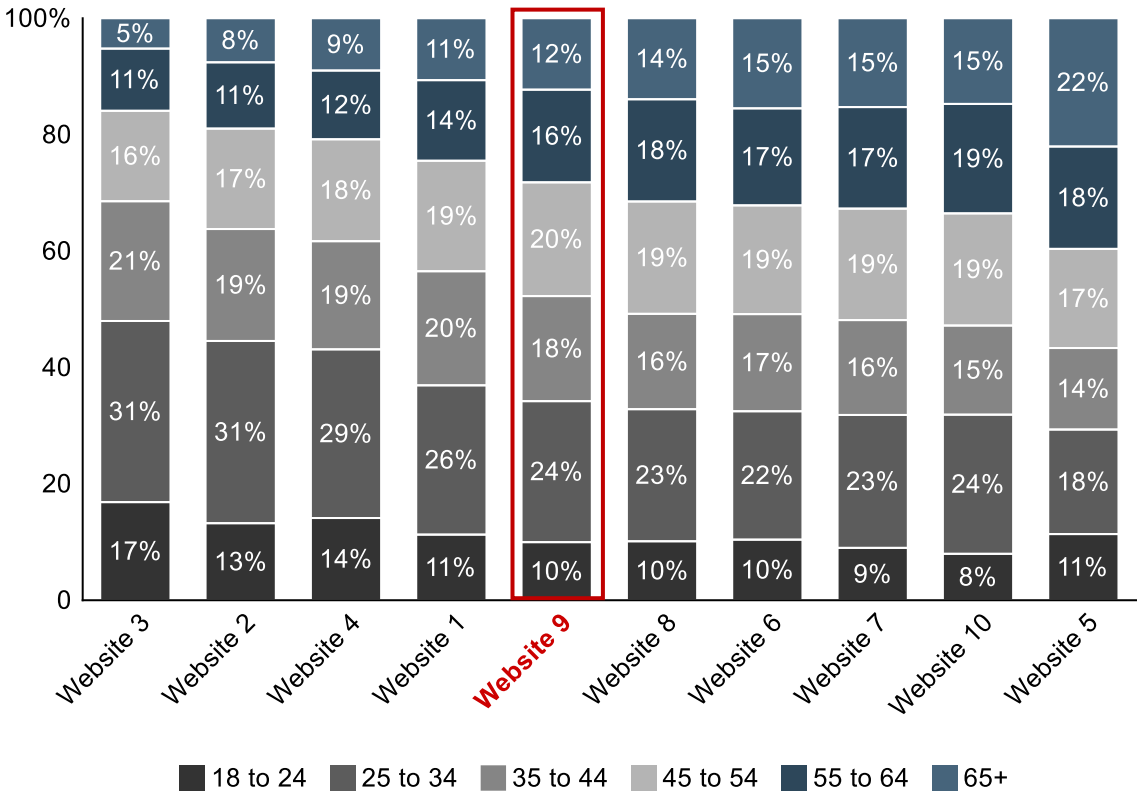
## Gender split varies across brands – Website 9 receives a slightly higher share of female visitors

Visits split by gender (Jan'22-Feb'25)




## 18 to 54-year-olds make up ~70% of visitors across brands; Website 9's largest audience is 25-34-year-olds

Visits split by age group (Jan'22-Feb'25)




Note: LHS chart is sorted by the highest share of female visitors; RHS chart is sorted is sorted by the highest share of visitors aged 18–54
Source: SimilarWeb

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# **SEO:** Most Peer 1 brands have potential to improve organic visits and CTR

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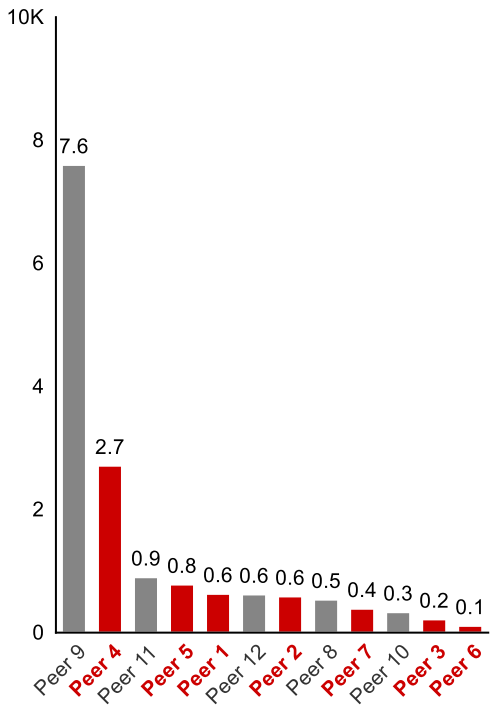
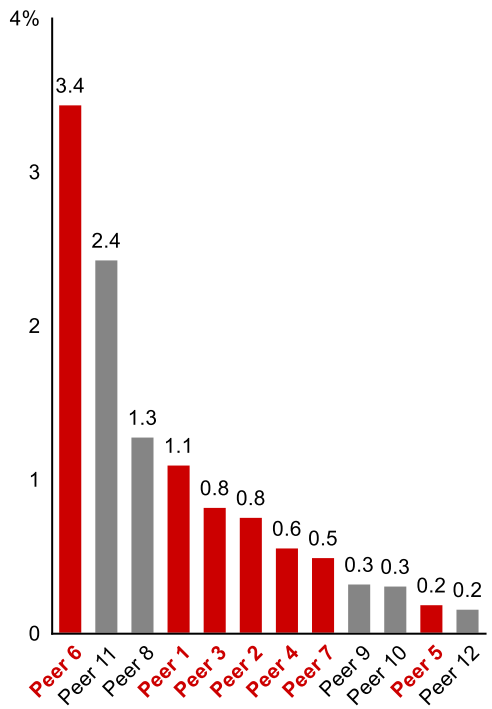
## Peer 9 significantly ahead of peers in terms of # of keywords

Number of keywords for which website ranks in top 100 (K)



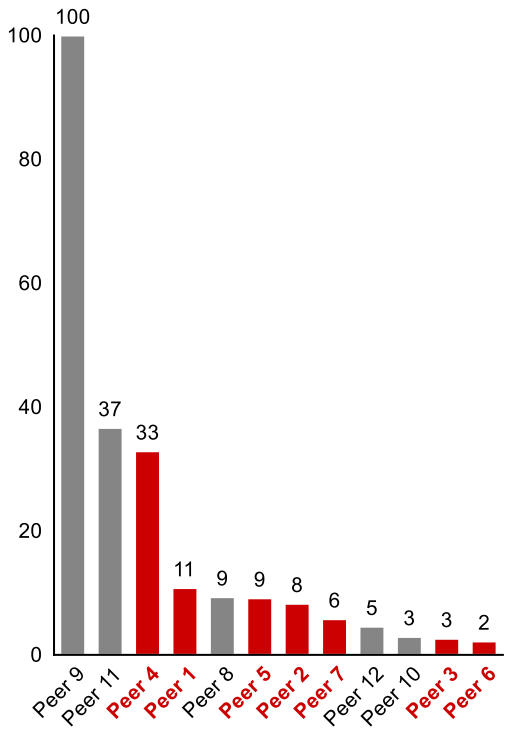

## Peer 6 has the highest CTR

Click Through Rate (%)




## Peer 9 leads players on traffic as well

Organic traffic (indexed to highest)




## Commentary

- Organic search optimization is critical as it helps in developing a channel that can provide **free traffic in the long run**
  - It does not require investments in media buying rather involves development of content and resources to optimize the website
- Most of the Peer 1 brands **trail across all metrics**, indicating **untapped growth potential.**

Source: SEMrush, data for the last 30 days ending 17th April, 2025

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# **SEO:** Peer 1 brands have opportunity to focus on unbranded terms to unlock the next set of potential customers

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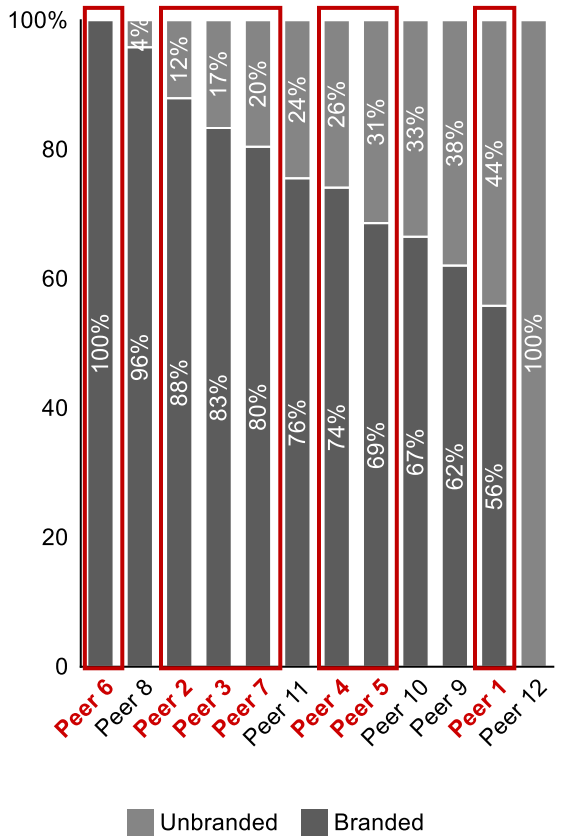
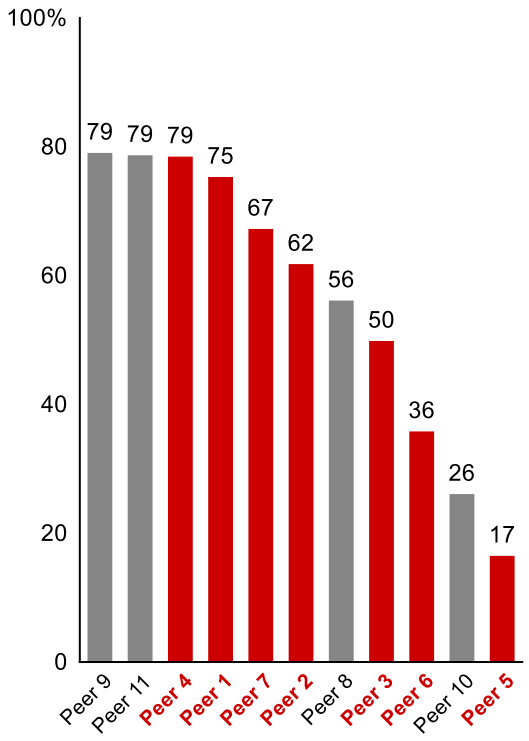
### Peer 1 group drives traffic mainly via unbranded terms

Branded vs unbranded traffic share (%)



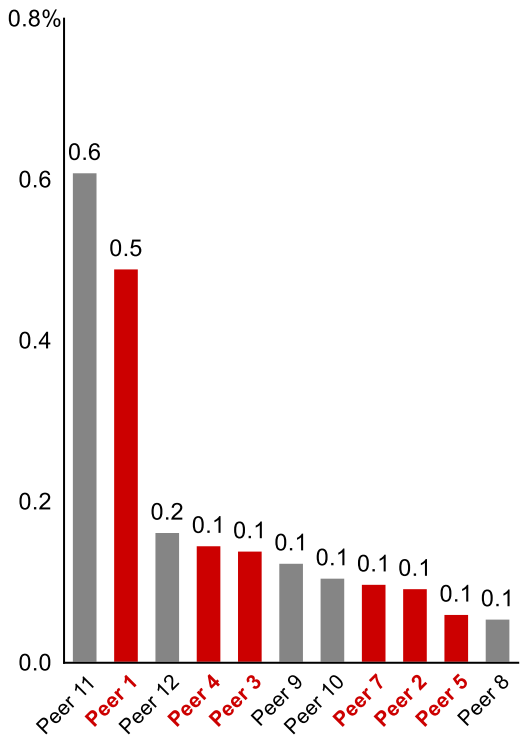

### Peer 4 & Peer 1 are positioned well on Branded CTR

Branded Click Through Rate (%)




### Peer 1 behind peers in Unbranded CTR (avg ~0.1%)

Unbranded Click Through Rate (%)




### Commentary

- Peer 1 brands **mostly capture** traffic through **branded keywords**, limiting its reach
- Opportunity for brands like Peer 6, Peer 2, and Peer 7 to focus **on unbranded search visibility**, to **boost** their respective **brand visibility** resulting in better reach
- Compared to peers, all the Peer 1 brands show **weaker branded click-through rate performance**
  - Branded CTR reflects **user intent and loyalty**—while Peer 3 and Peer 5 lag peers, enhancing this metric offers a **clear path to stronger brand engagement and conversions**.

Note: Peer 6 attracts traffic only through Branded keywords
Source: SEMrush, data for the last 30 days ending 17th April, 2025

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# **Search ranking:** Scope for Peer 1 brands to enhance website content to attract more users and drive conversions

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| Keyword | Search Volume | Target | | | | | | | Peer 9 | | Peer 11 | | Peer 12 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Peer 4 | Peer 1 | Peer 2 | Peer 5 | Peer 7 | Peer 3 | Peer 6 | Peer 9 | Peer 8 | Peer 11 | Peer 10 | Peer 12 |
| *paving companies near me* | *18,100* | >100 | >100 | >100 | >100 | >100 | >100 | >100 | 4 | >100 | >100 | >100 | >100 |
| *Paving* | *14,800* | >100 | >100 | >100 | 58 | >100 | >100 | >100 | 3 | >100 | >100 | 50 | >100 |
| *asphalt paving* | *9,900* | 74 | >100 | >100 | >100 | 36 | >100 | >100 | 5 | >100 | >100 | >100 | >100 |
| *driveway sealcoating* | *8,100* | >100 | >100 | 12 | 45 | >100 | >100 | >100 | 60 | >100 | >100 | >100 | >100 |
| *asphalt contractors* | *6,600* | 71 | >100 | >100 | >100 | 59 | >100 | >100 | 62 | >100 | >100 | >100 | >100 |
| *paving contractors near me* | *6,600* | >100 | >100 | >100 | >100 | >100 | >100 | >100 | 5 | >100 | >100 | >100 | >100 |
| *asphalt contractors near me* | *5,400* | >100 | >100 | >100 | >100 | >100 | >100 | >100 | 5 | >100 | >100 | >100 | >100 |
| *paving contractor* | *5,400* | >100 | >100 | >100 | 7 | >100 | 56 | >100 | 2 | >100 | >100 | 36 | >100 |
| *paving contractors* | *5,400* | >100 | 6 | >100 | >100 | 28 | >100 | >100 | 12 | >100 | >100 | 26 | >100 |
| *paving companies* | *3,600* | >100 | >100 | >100 | >100 | >100 | >100 | >100 | 4 | 64 | >100 | 21 | >100 |
| *paving company* | *3,600* | >100 | >100 | >100 | >100 | 30 | >100 | >100 | 3 | >100 | >100 | 50 | >100 |
| *ada parking requirements* | *2,900* | >100 | >100 | >100 | >100 | 23 | >100 | >100 | 44 | >100 | >100 | >100 | 41 |
| *asphalt companies* | *2,900* | >100 | >100 | >100 | >100 | 39 | >100 | >100 | 5 | >100 | 8 | 37 | >100 |
| *sealcoating driveway* | *2,900* | >100 | >100 | 14 | 18 | >100 | >100 | >100 | 75 | >100 | >100 | >100 | >100 |
| *asphalt contractor* | *2,400* | >100 | >100 | >100 | >100 | 96 | >100 | >100 | 6 | >100 | 73 | >100 | >100 |
| *pavement contractors* | *1,900* | >100 | >100 | >100 | >100 | 48 | >100 | >100 | 6 | >100 | 33 | >100 | >100 |
| *pavement company* | *1,600* | >100 | 4 | 8 | >100 | 84 | >100 | >100 | 2 | >100 | >100 | >100 | >100 |
| *seal coating driveway* | *1,600* | >100 | >100 | 22 | 33 | >100 | >100 | >100 | 74 | >100 | >100 | >100 | >100 |
| *asphalt paving contractors* | *1,300* | 41 | >100 | >100 | >100 | 13 | >100 | >100 | 7 | >100 | 40 | >100 | >100 |
| *contractor paving* | *1,300* | >100 | >100 | >100 | 18 | 77 | 61 | >100 | 12 | 73 | >100 | 85 | >100 |
| *pothole repair* | *1,300* | 9 | 51 | 82 | >100 | >100 | >100 | >100 | >100 | >100 | >100 | >100 | >100 |
| *seal coat driveway* | *1,300* | >100 | >100 | 19 | 32 | >100 | >100 | >100 | 78 | >100 | >100 | >100 | >100 |
| *parking lot repair* | *1,000* | >100 | 4 | >100 | >100 | >100 | >100 | >100 | 63 | >100 | >100 | >100 | 14 |
| *parking lot sealcoating* | *880* | 57 | 18 | 6 | >100 | >100 | >100 | >100 | 30 | >100 | >100 | >100 | >100 |
| *parking lot fix* | *590* | >100 | 7 | >100 | >100 | >100 | >100 | >100 | 18 | >100 | >100 | >100 | 36 |
| *asphalt crack sealing* | *480* | 45 | 37 | >100 | 19 | >100 | >100 | >100 | 81 | 61 | 33 | >100 | >100 |
| *asphalt repair companies* | *480* | 78 | 80 | >100 | >100 | 91 | >100 | >100 | 34 | >100 | >100 | >100 | >100 |
| *concrete parking lot contractors near me* | *480* | >100 | 63 | >100 | 91 | 28 | 31 | >100 | 2 | >100 | >100 | >100 | >100 |

Note: Avg. ranks over the last 30 days – therefore, same rank can be there for multiple brands | Source: SEMrush, last 30 days ending 17th April, 2025

***Legend*** Rank 80-100 | Rank 51-80 | Rank 21-50 | Rank 11-20 | Rank 4-10 | **Rank 1-3**

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# **SEM:** Peer 9 invests heavily in paid search advertising; Only Peer 2 currently investing in paid search amongst Peer 1 brands

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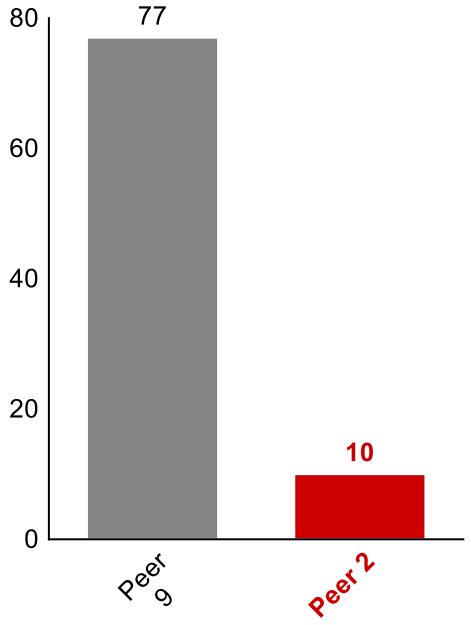
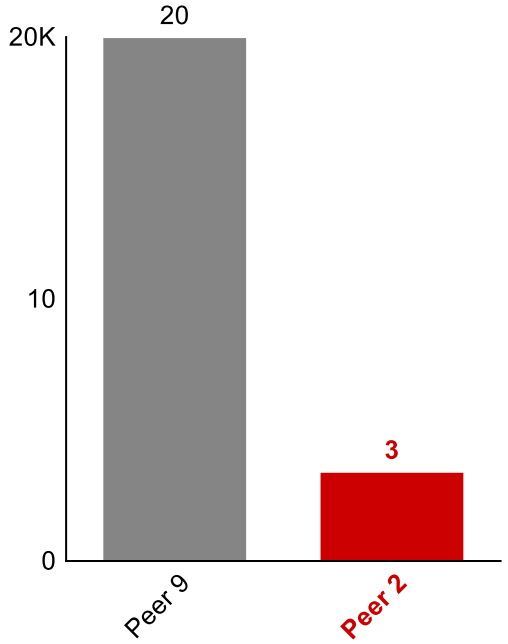
## N of keywords

Number of keywords being bid on



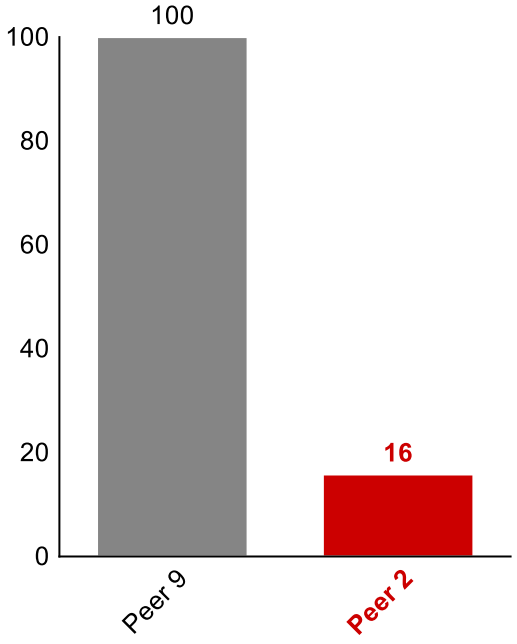

## Spend $K

Paid Search Spend ($K)




## Paid search traffic

Paid search traffic (indexed)




A **low CTR** indicates **ineffective keyword targeting**, suggesting that the chosen keywords are not highly relevant **to the search intent** of their **target audience**

| | | |
|---|---|---|
| CTR (%) | 2.4 | **2.0** |
| CPC ($) | 6.4 | **6.8** |

## Commentary

- **Peer 9 invests more on paid search vs. Peer 2** whereas rest of the peers do not invest in paid search traffic
  - Opportunity for Peer 1 brands to invest on paid search
- Both Peer 2 and Peer 9 operate with a high **CPC** (~$6.5+) and low **CTR;** opportunity to optimize SEM strategy to lower CPC and improve CTR
- Opportunity for Peer 1 brands to start investing and **bid on high-volume unbranded keywords** to capture high intent target audience

Note: Paid search investment only done by Peer 9 and Peer 2 in last 30 days
Source: SEMrush, for the last 30 days ending 17th April 2025

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# **SEM:** Scope for Peer 2 to invest in a well-optimized mix of keywords, keeping CPCs in check

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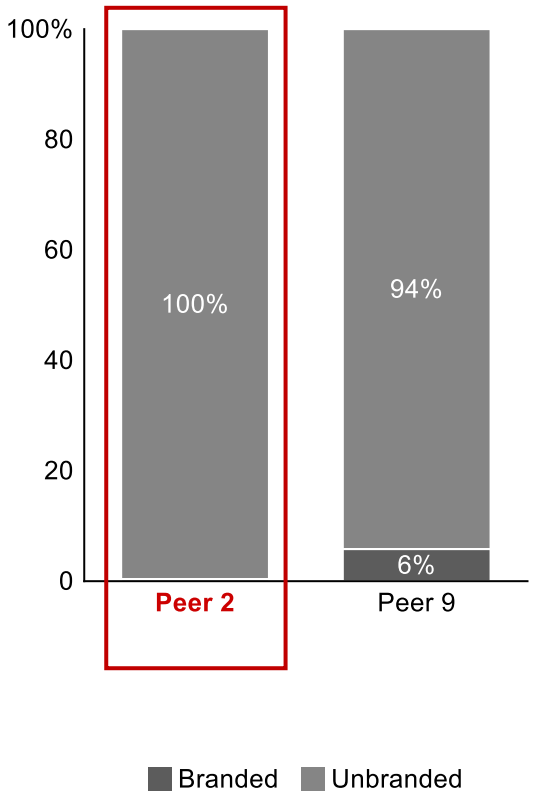
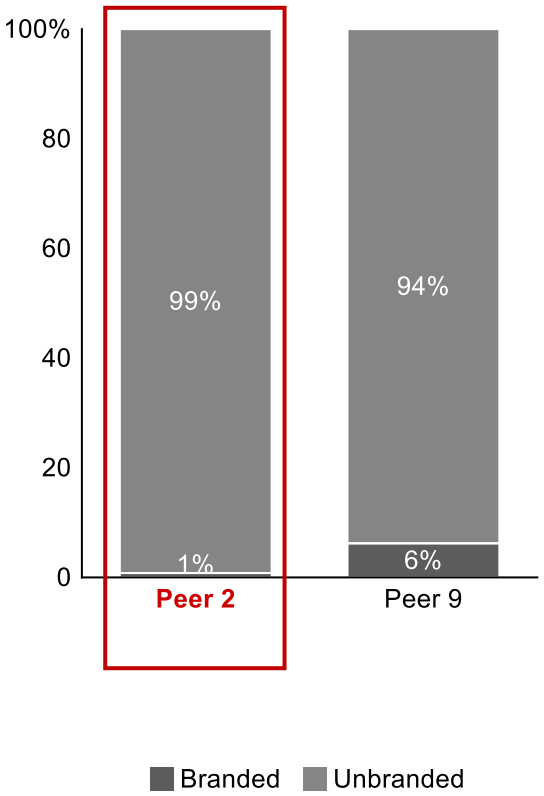
## Branded v unbranded spend

% split branded vs unbranded spend

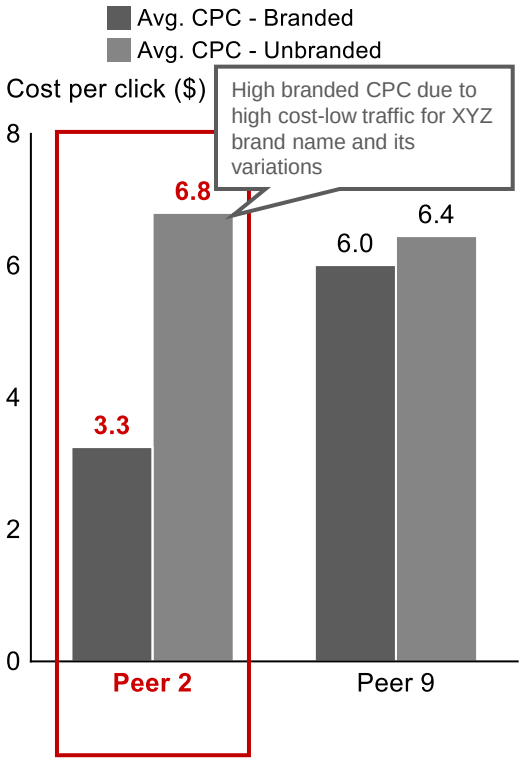



## Branded v unbranded traffic

% split branded vs unbranded traffic




## Cost-per-click




| | Peer 2 | Peer 9 |
|---|---|---|
| Avg. position - Unbranded | **3.4** | 2.5 |
| Avg. position - Branded | **1.0** | 1.0 |

## Commentary

- **Peer 2 spends only on unbranded terms** and generates ~99% traffic via unbranded, similar to Peer 9
  - Investment in unbranded terms helps in increasing brand discoverability among potential consumers who are unaware of the brand and attract incremental traffic to website
- Opportunity for other brands to focus on investing in high search volume unbranded keywords that well help brands to create a stronger presence
  - Unbranded terms have higher search volume vs. branded, and have reasonable cost

Note: Paid search investment only done by Peer 9 and Peer 2 in last 30 days
Source: SEMrush, for the last 30 days ending 17th April 2025

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# **Paid search:** Opportunity for Peer 1 brands to bid on high-volume, low-cost keywords where they lack strong organic rankings

PAID SEARCH

DIRECTIONAL

| Keyword | Search Volume | Peer 2 | Peer 9 |
|---|---|---|---|
| *concrete companies near me* | *27,100* | - | 4 |
| *paving companies near me* | *18,100* | 4 | - |
| *asphalt companies near me* | *14,800* | - | 1 |
| *concrete company near me* | *12,100* | - | 1 |
| *asphalt paving* | *9,900* | - | 2 |
| *concrete contractor near me* | *9,900* | - | 2 |
| *concrete suppliers near me* | *8,100* | - | 3 |
| *asphalt paving near me* | *6,600* | - | 4 |
| *parking lot striping* | *6,600* | - | 3 |
| *asphalt contractors near me* | *5,400* | - | 2 |
| *sealcoating* | *5,400* | 1 | 3 |
| *parking lot striping near me* | *4,400* | - | 2 |
| *paving companies* | *4,400* | - | 2 |
| *asphalt sealing near me* | *1,900* | - | 3 |
| *asphalt paving companies near me* | *1,600* | - | 4 |
| *parking lot painters* | *1,300* | 5 | 2 |
| *sealcoating companies near me* | *1,300* | - | 3 |
| *local concrete contractors* | *480* | - | 1 |
| *concrete staining companies* | *390* | - | 2 |
| *asphalt repair contractors near me* | *320* | - | 1 |
| *asphalt parking lot repair* | *260* | - | 1 |
| *road paving companies near me* | *210* | - | 1 |
| *parking lot asphalt* | *170* | 4 | 3 |

Note: No paid search investment for Starling in last 30 days
Source: SEMrush, for the last 30 days ending 17th April, 2025

**Legend** Rank 4-7 **Rank 1-3**

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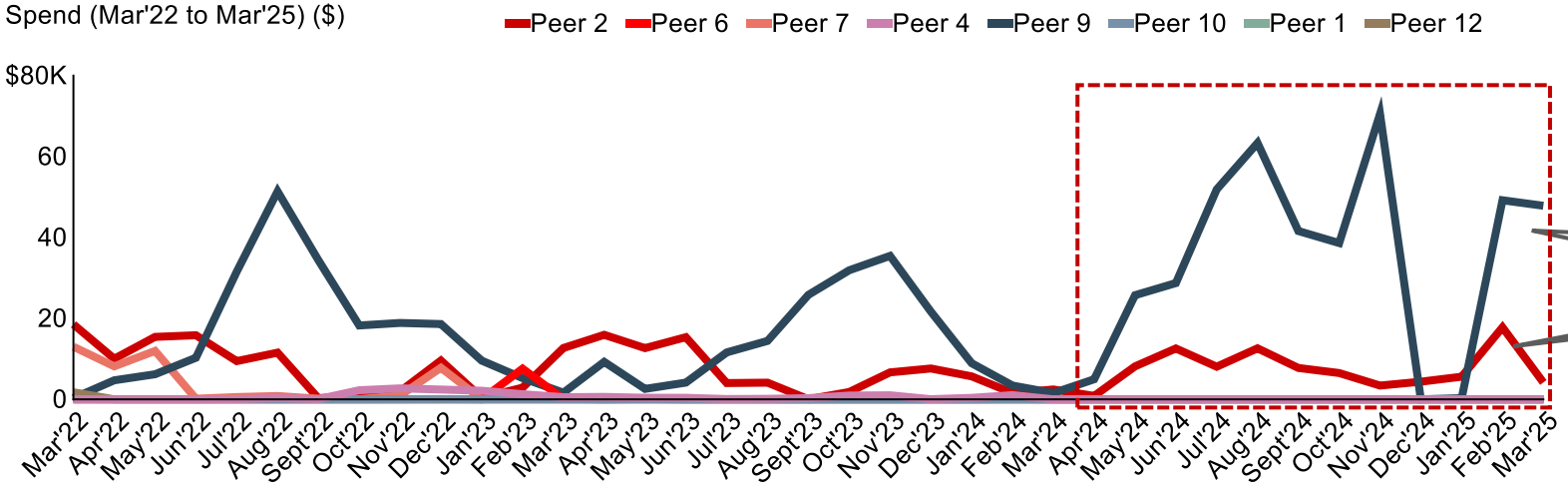
# **Paid search spend & CPC:** Only Peer 2 is actively spending on paid search over LTM; Opportunity for others Peer 1 brands to start investing

PAID SEARCH

DIRECTIONAL

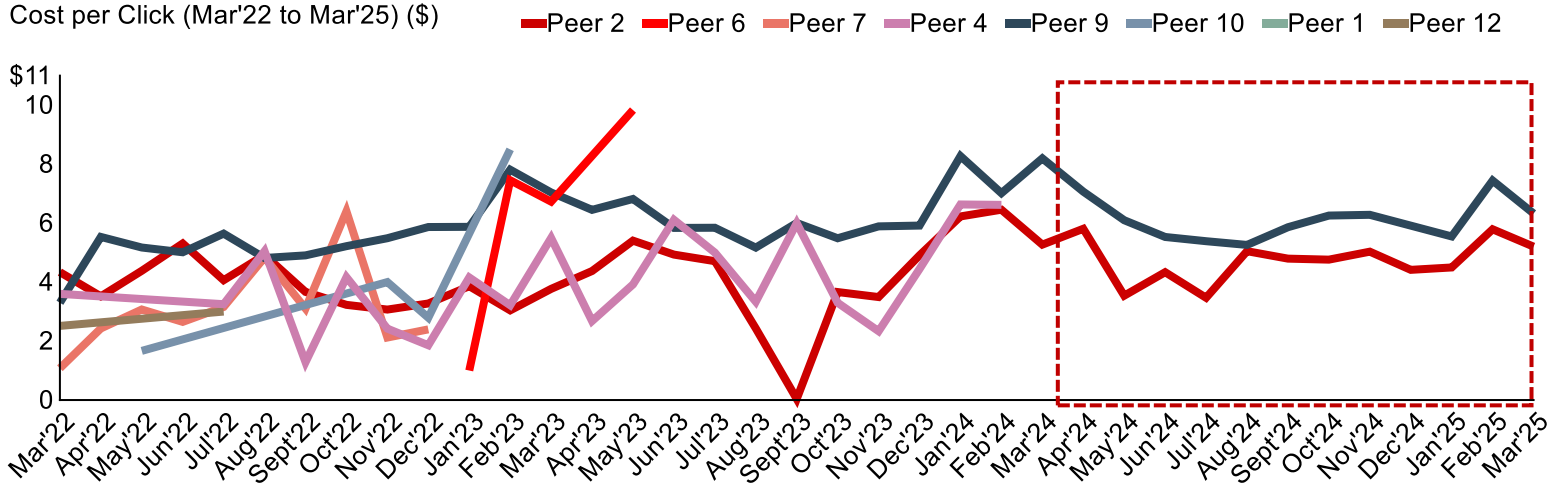
Spend (Mar'22 to Mar'25) ($)




| Brands | Avg Monthly Spend (LTM, $K) | Change YoY |
|---|---|---|
| **Peer 2** | **7.6** | *18%* |
| **Peer 9** | **35.2** | *148%* |

Only Peer 2 and Peer 9 have invested in Paid Search over the LTM

Cost per Click (Mar'22 to Mar'25) ($)




| Brands | Avg CPC LTM | Change YoY |
|---|---|---|
| **Peer 2** | **4.6** | *6%* |
| **Peer 9** | **6.0** | *1%* |

Note: LTM refers to Apr'24-Mar'25
Source: SEMrush

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