

# 2009 Search Marketing Benchmark Guide

Note: This is an authorized excerpt from the full 2009 Search Marketing Benchmark Guide. To download the entire Guide, go to: <http://www.SherpaStore.com> or call 877-895-1717

# Director's Note

Welcome to MarketingSherpa's Search Marketing Benchmark Guide for 2009.

This fifth annual edition has been completely rewritten and re-researched, and it benefits from the efforts of a diverse team of researchers, editors and reporters. That's what it takes to cover the rapidly evolving nature of search marketing.

To make sense of nearly 300 pages of data, we've broken the guide into five major coverage areas:

**#1. Budgeting and Search** – From the effects of the slowing economy to how different types of companies are budgeting for search, this section covers the all-important intersection between expense and opportunity.

**#2. Tactics of Search** – Each year brings new ways of using or understanding search, including the increasingly important role of demographics, geotargeting, local and mobile. This year, we also take a deep look at the enigmatic relationship between search and brand.

**#3. Search Providers Explored** – Google is the biggest game in town, but it isn't the only search provider. Our Benchmark Guide goes behind the scenes of top general and vertical search players and takes a look at international search engines – with an emphasis on the rapidly growing (and maturing) Asian market.

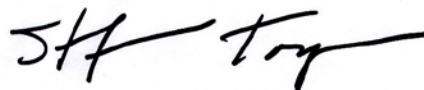
**#4. Measuring and Testing** – As the cost of search rises, the days of blistering ROI seem to be over – but are they? Search is still highly effective for companies that rigorously learn, measure and test.

**#5. Search Benchmarks** – All of the fundamental metrics of search marketing, fully updated and in one place, including costs per click, keyword prices, volume and conversion rates.

In addition, the Guide features information from a number of other MarketingSherpa research studies carried out in the past 12 months, including new data about marketing through the economic downturn. It also features 'best-of' research from more than 50 respected sources, many of whom provided exclusive data to MarketingSherpa.

All told, this year's edition is one the largest reports we've ever produced, with 215 charts, tables and eyetracking heat maps. It's packed with information, and we hope it will be useful to you. The Guide is designed to be one-half yardstick with benchmarks and standards for success and one-half inspiration with explorations of what's working, what's not and what's on the horizon.

Until next year, good luck with all of your marketing efforts.



Stefan Tornquist  
Research Director, MarketingSherpa LLC

## Executive Summary

In just 12 months, much has changed for the still-young industry of search engine marketing, and even more will change in the years to come. From a technological standpoint, search engines are becoming increasingly sophisticated. They are able to make sense of more varied types of content – pulling faces out of video and matching song titles to recorded snippets of music. Search results are simultaneously more comprehensive – thanks to universal search results – and more coherent, because of better filtering, more personalization and a greater emphasis on relevance.

Examining the business of search, we see that Google has gained considerably more money, more users, more advertisers, greater market share and more industry talent than any, perhaps all, of the competition. With great power comes great responsibility, and most would agree that the masterminds at Google have used their power to the benefit of the industry, all Internet users and, of course, themselves. Google's tendency to release great software for free, and then subtly monetize it after it builds up a following has made many Internet users very happy. But Google also has shuttered many niche competitors who simply can't compete with "free."

Taking a step further back, greater penetration of Internet access, faster broadband speeds and ubiquitous mobile data networks in urban areas are driving mass adoption of multimedia consumption on desktop computers and mobile media consumption on mobile devices. All this content has to be indexed and searchable, and the result of all this is a massive increase in video and localized searches.

From the simple reality of population size, Asian countries – in particular, China – are coming online in greater numbers than are Americans or Europeans. By 2009, more Chinese will be Internet users than Americans. Search, as both a global and volume-driven business, must adjust to this reality.

Finally, looking at the simple tactics and strategies that make up the day-to-day realities of SEM professionals, we're seeing a sea change in the credibility and practice of search engine optimization. Once considered something of a "dark art," SEO is joining PR and email marketing as legitimate forms of inexpensive marketing. Much of this shift is from Google penalizing marketers for trying to game the SEO system. By incorporating quality into their relevance ranking scores, they have effectively incentivized anyone who wants to be found on Google's map of the Internet to clean up their virtual neighborhoods.

Google is by far the biggest entity in the search world, but many, many other companies out there are doing interesting things. Mobile search is projected to eventually be bigger than desktop search, so that area is a place to watch for any serious competition to Google. Plus, the Chinese market has been giving Google some trouble. For many users, Google is essentially a synonym for "search," but their long-term dominance in the global market is one they'll have to work every day to maintain.

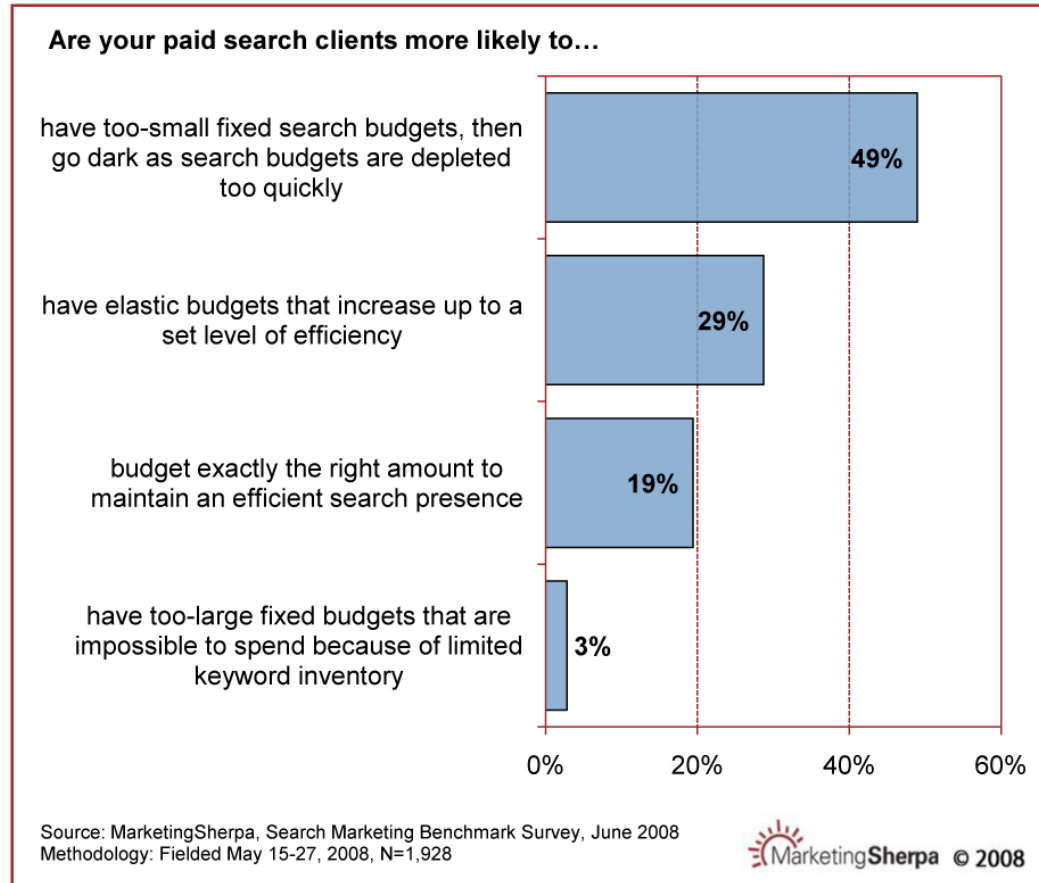
Overall, search engine marketing is turning into a mature and respected teenaged industry. It's an exciting time to be part of it. Here are our five top takeaways.

## #1. Budgeting for Search Is a Strategy Unto Itself

A big stumbling block for paid search marketers is getting spending right. Brands obsessed with keeping the #1 listing tend to overbid, burning through budgets quickly and inefficiently. Many marketers buy a set number of impressions with a fixed spend and have little idea of how to predict and budget for the number of searches that actually occur. However, a growing number of PPC specialists have switched to a bid system based on efficiency rather than absolute position on the page. They employ flexible budgets to satisfy demand efficiently as it occurs.

The risk of setting the level of efficiency too high and getting a low volume of clickers exists, but the risk of paying too much and actually losing money is a far less pleasant alternative. Analytical tools are quite good at showing the outcomes of a search campaign. As their sophistication increases, the same tools will predict outcomes of a campaign and allow marketers to plan accordingly.

**Chart 1: Elasticity of Clients' Search Budgets**

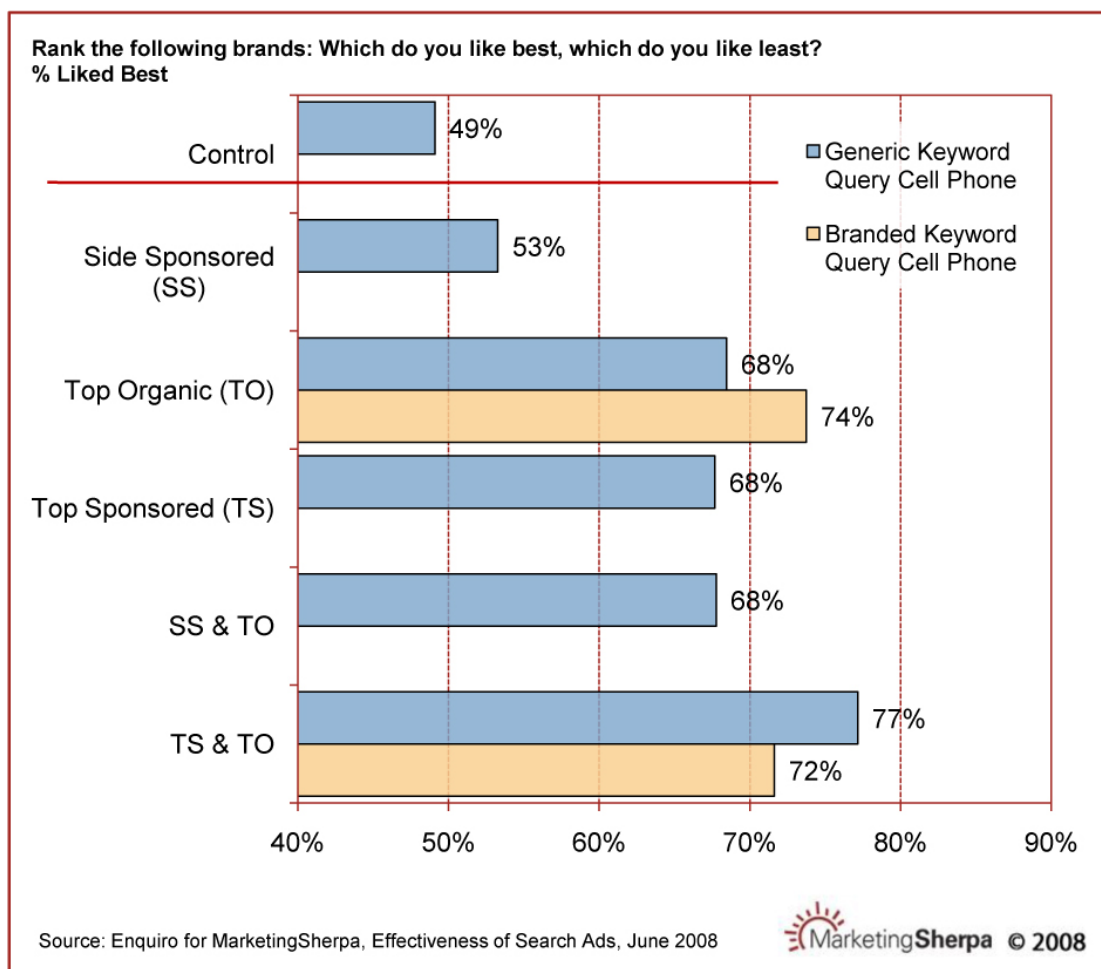


## #2. Search Advertising Affects Brand Metrics

Search engine users are people, and people tend to make decisions based on their feelings. Brand marketers have known and worked within this framework for years, while search marketers have emphasized deals and immediate payoffs over branding, clicks over quality. As the activity of searching for information before shopping gets more common and cheap clicks harder to find, brands are becoming more important to search marketers.

Whether marketers plan for it or not, search is a medium that affects the perception of a brand. To the skeptics, we offer the following chart – excerpted from an Enquiro brand effectiveness study done for a major cell phone maker. A group of consumers who had recently been exposed to the brand on a search page vs. a control group who had not been exposed to it liked the brand that got search results on the page far more.

**Chart 2: Effect on Brand Favorability Among Ad-Exposed Searchers**

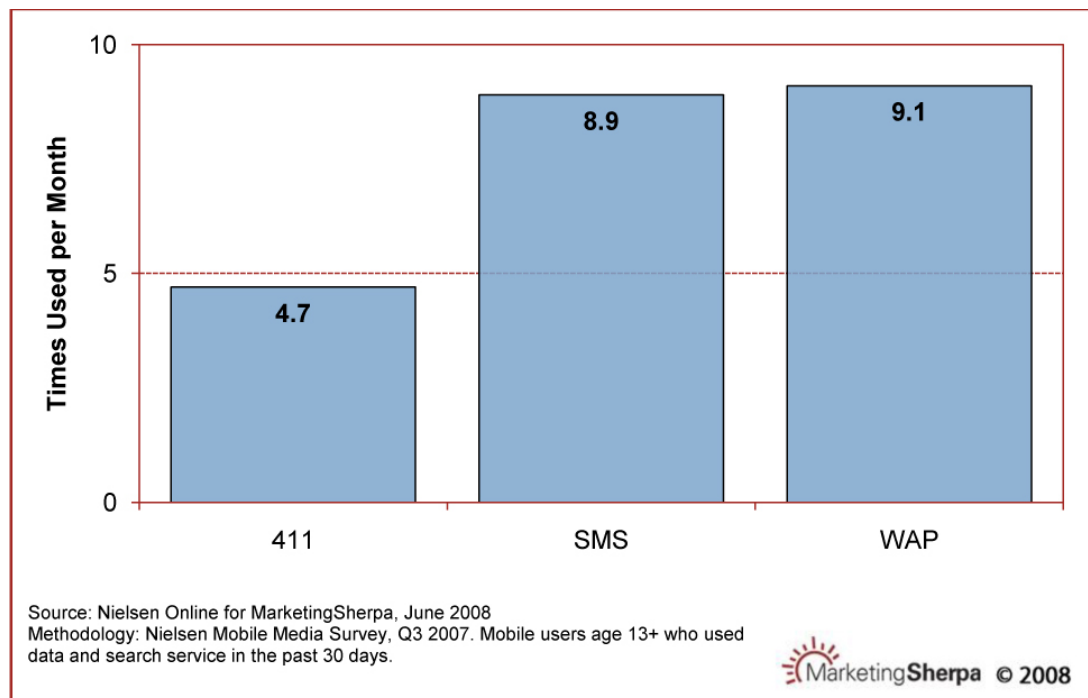


### #3. Physical Location of Searchers Is Important for Relevant Results

A fair amount of confusion still exists over the semantics of location-based search terms. Mobile search refers to any search coming from a mobile device. Geotargeting is what marketers do to exclude searchers from seeing their ads. Local search is what consumers do to exclude marketers deemed irrelevant by geography. Both are methods of achieving relevancy based on geographic exclusion. The only difference between local search and geotargeting is which party is doing the excluding – marketer or consumer. Regardless, we're seeing huge increases in the use of mobile and local search.

As you can see in the chart below, consumers that use mobile search use it far more often once they switch from voice to data queries. This change in behavior will require search marketers to shift their tactics some. It is going to have profound consequences for how local businesses market themselves. Competition at the local level can be fierce. Somewhat counter-intuitively, by targeting fewer consumers, individual clicks often get more expensive. Marketers still need to experiment to get the right mix of volume and efficiency when targeting locally.

**Chart 3: Usage Frequency Among Types of Google Mobile Search**



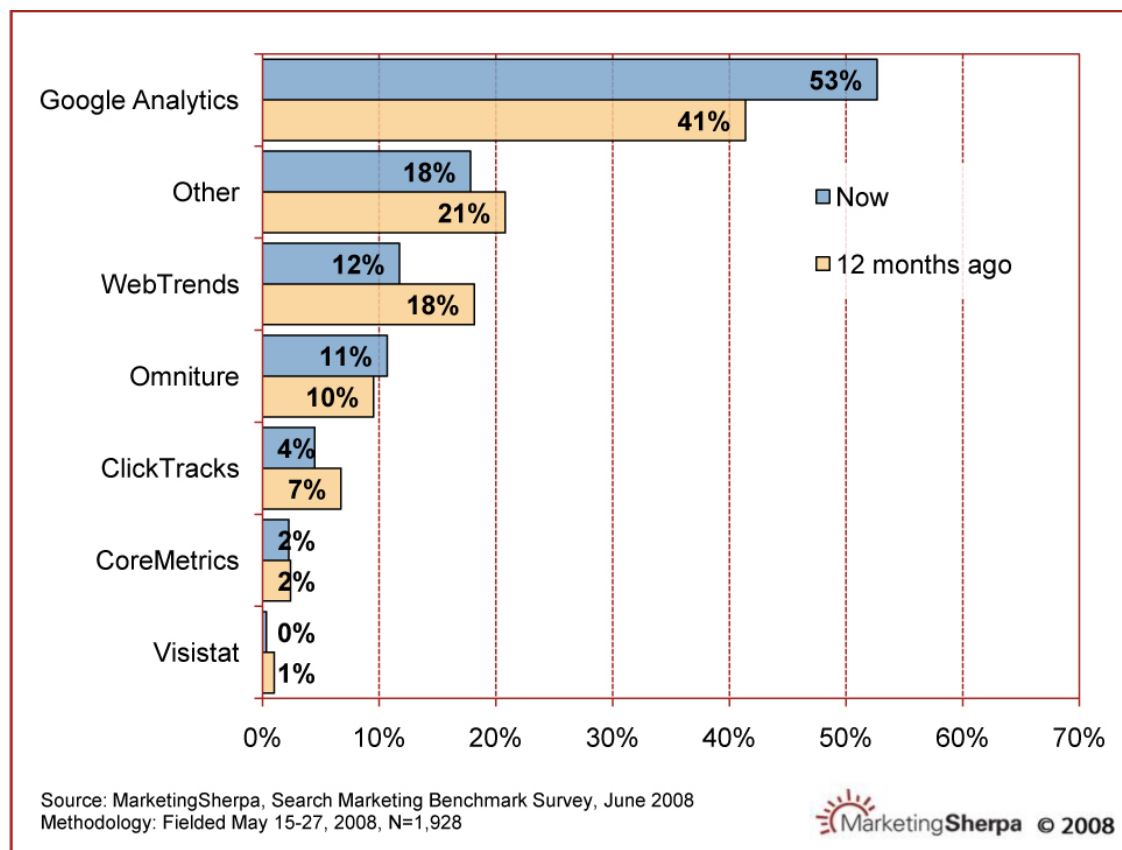
## #4. Analytics Makes Inroads; Google Leading the Charge

Marketing is all about finding the delicate balance of greatest return on spend. Adjusting the media mix to make sure the marketing vehicles that provide the greatest return are kept while poor performers are dropped requires an accurate and understandable analytics program. This is especially true of search marketing because hundreds or thousands of keywords must be bid on and evaluated for return individually.

Before Google Analytics, many companies provided closed-loop reporting. But the good ones were prohibitively expensive. Google undercut the market with their free analytics program and website optimizer and scooped up market share quickly. They did this partially by providing analytics to sites that used to have none. This doesn't appear to be hurting the really hard-core analytics providers, Omniture and CoreMetrics, which specialize in understanding massive cross-media ad campaigns and huge websites.

The more complicated the campaign, the more an outside vendor is needed to help make sense of it. For the much bigger long tail of smaller marketers with more manageable campaigns, Google seems to offer a great product at an unbeatable price.

**Chart 4: What Analytics Programs Get Used Most?**

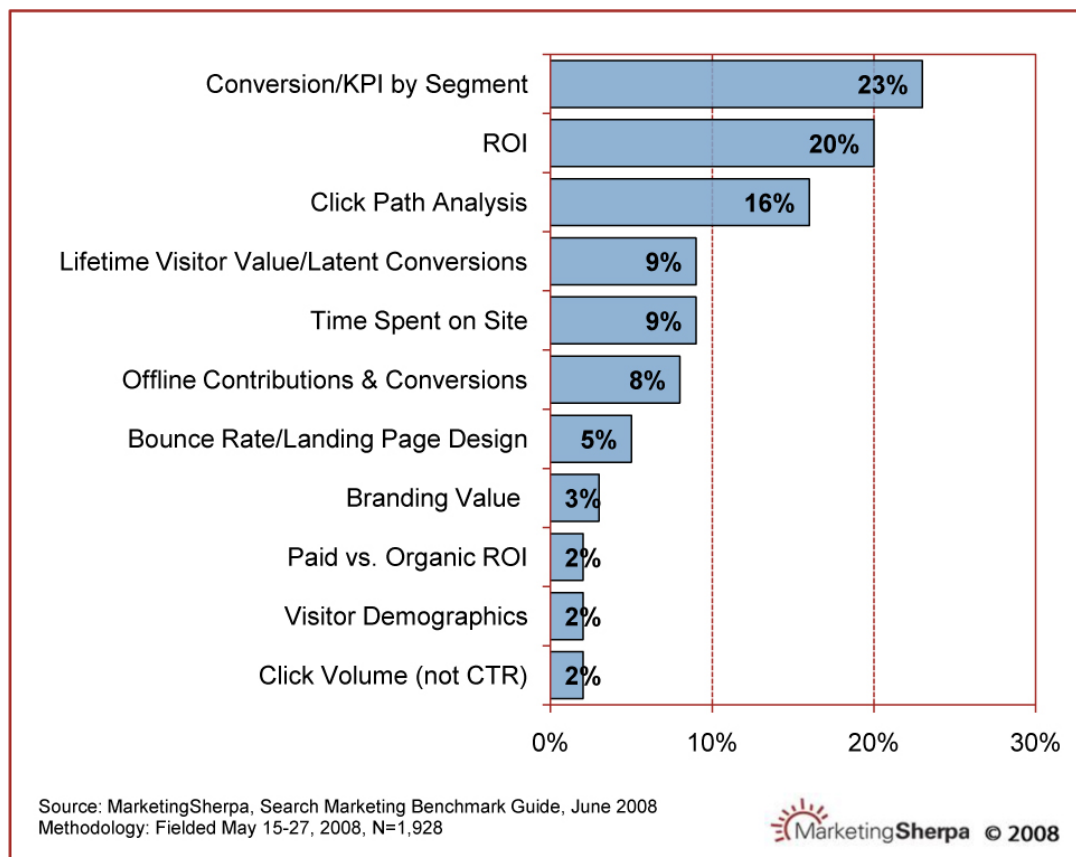


## #5. Having Analytics Is Not the Same as Understanding Analytics

Tracking proxy metrics, things that happen in a marketing campaign between seeing an ad and an eventual decision to purchase, is relatively easy. Tying these metrics together to make sense of the journey a buyer takes from awareness to a sale is, however, quite difficult. Knowing that some words get more clicks is not the same as knowing which word the person who actually bought something clicked on.

Tying conversion metrics back to exposures gets even more complicated when the ad exposure or the conversion happens in an offline setting with no digital data trail. We asked marketers which metrics were most under-used, then grouped their responses into the categories below. Tracking conversion and ROI were big concerns. So was finding ways to evaluate results when a conversion to sale is harder or even impossible to track. It's a little scary that this is still such a big problem, but it's good to know that it's being tackled.

**Chart 5: Search Marketers Rank Most Under-used Metrics**



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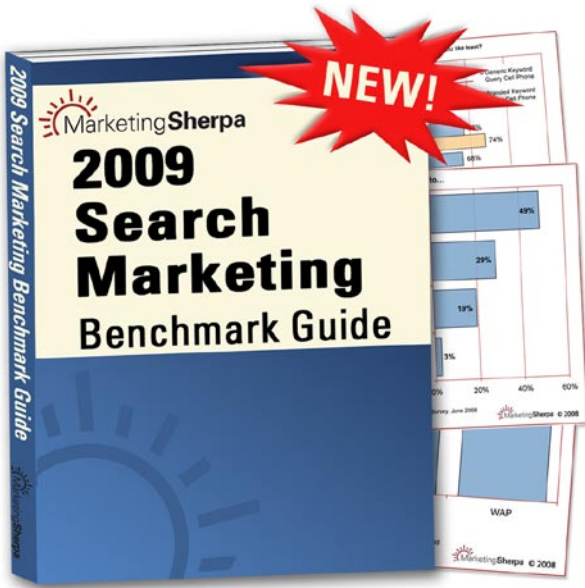
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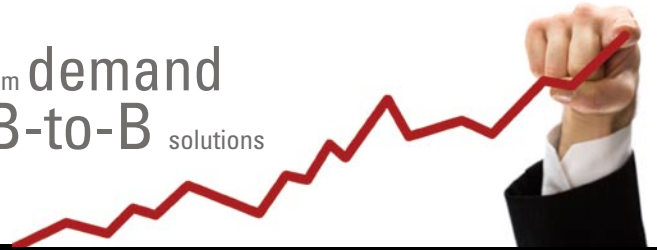
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