

Search Marketing

Benchmark Guide 2007

185 Charts & Tables
+ 18 Eyetracking Heatmaps

Note: This is an authorized excerpt from the full 262-page Search Marketing Benchmark Guide.
To download the entire Guide, go to: <http://www.SherpaStore.com> or call 877-895-1717

Letter from the Editor

Welcome to the 2006-2007 edition of MarketingSherpa's Search Marketing Benchmark Guide. Inside you'll find a 360-degree comprehensive view of what works in search marketing today (and what doesn't), including all-new data directly from:

- 3,053 marketers who conduct or supervise search marketing for their own companies.

You'll discover what their real-life results, budgets and tests are. Yes, we broke out their answers by major search marketing goal (for example, direct ecommerce sales versus lead generation campaigns) as well as B-to-B versus marketing to consumers. Plus, you'll see fascinating three-year trend data for many key points we've been tracking since this study began in 2003.

- 891 executives and staff at search marketing agencies who conduct campaigns for clients.

Learn how tactics, spending and results differ from their experienced perspective. They handle campaigns for dozens or more ongoing clients at any one time; their insights are of huge practical use.

- Actual consumers who use search engines

You'll find demographic stats and media usage charts so you can compare search and specific engines to other media channels. Plus, with our annual eyetracking study, you'll see how consumers' eyes view search results pages. Yes, there have been some eye-opening changes since last year.

In addition to all the basics – costs per click, conversion rates, search traffic stats, SEO versus PPC, etc. – this year we've included five new practical studies to extend your knowledge beyond the media buzz:

Search & Shopping

New data on the anatomy of the buying process – including how consumers research planned purchases online; how they use shopping comparison sites versus general search engines; how many retail sites an average shopper visits; and which demographics are most likely to convert online.

Search Marketing & Public Relations

For the past 24 months, the tactic known as SEO PR (getting your hotlinked press releases included in search engine news feeds) has been the must-test search campaign de jour. So, we tested it. Discover what MarketingSherpa learned.

Vertical, Second Tier, Local and Pay Per Call Search

What's really working in niche search marketing – and what's not? Here's a reality check

on the mushrooming world of new search engines, B-to-B search engines and alternate offerings. Are they worth testing? Find out what your peers have to say about their results.

Click Fraud – Perception versus Reality

Is fraud the big bag wolf eating your budget? Are estimates out of whack with reality? Do clients worry more – or less – than agencies? Find out if you should really be worried.

Search Eyetracking Study Year Two

For this year's study, we invited consumers into an eyetracking lab to show us how they use Google, MSN and Yahoo! search when they are free-form searching for a topic of personal interest (an informational search) versus when they are shopping for an item they plan to buy online.

Plus, for your handy reference, we include a gallery of useful heatmap images from our now-famous 2005 eyetracking study as a baseline reference for you as well.

If you're debating how important page rank and specific search ad copy really are, just flip to these pages ...

All in all, our goal, as always, has been to create the most comprehensive collection of *practical* numbers, stats and real-life factoids about search marketing for actual working marketers. Use this newest Benchmark Guide to:

1. Budget for the coming year.
2. Forecast results including clicks, conversions and costs more accurately. (Also includes practical tips on measurement.)
3. Select which SEM tests you should try out to improve results for your current campaigns – and which may not be worth the work or investment.
4. Defend your search marketing plans to the boss (or to clients if you're an agency.)
5. Train new staff more easily (hiring fully experienced search marketers is tough right now, as you'll see from charts in this Guide.)

In the meantime, be sure to contact us with any questions about the charts, as well as your feedback and suggestions for next year's Guide at Feedback@MarketingSherpa.com.

Sincerely,



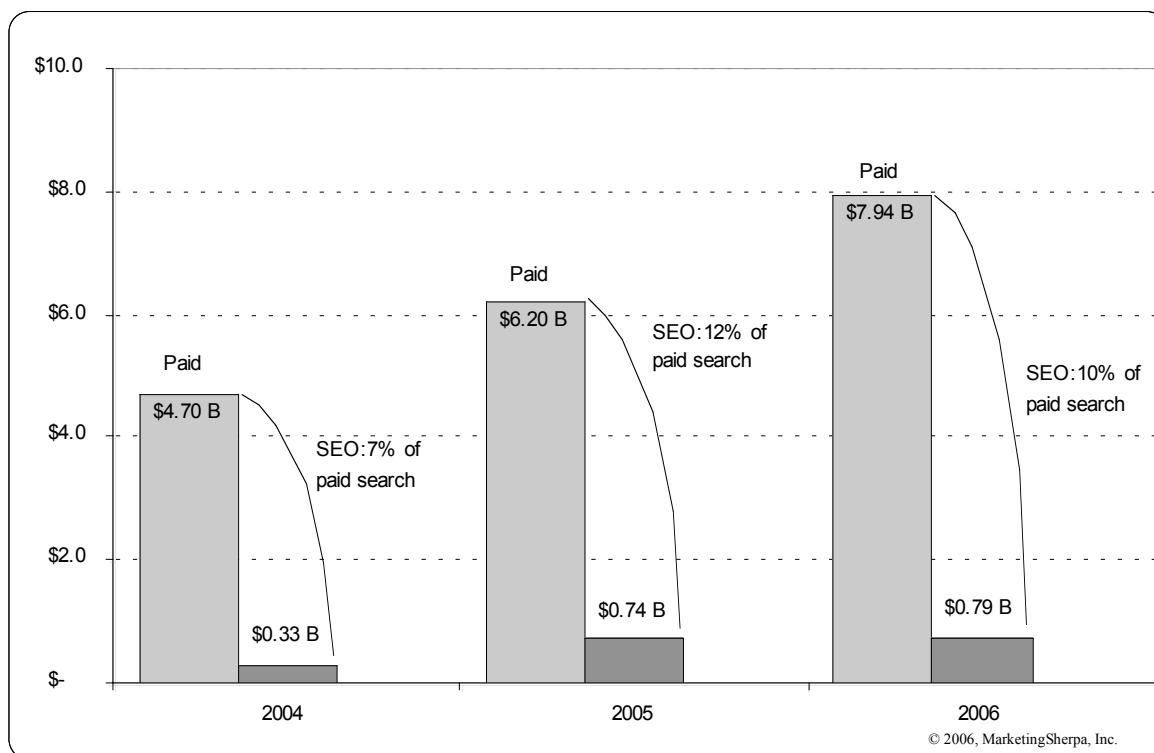
Tad Clarke
Editorial Director

Executive Summary: Top 7 Search Marketing Insights for 2007

Thirteen years ago, the very first search marketing campaigns were launched. Back then, they were mainly guerrilla campaigns launched by entrepreneurial marketers far beyond the envelope's edge. Now, as you know, search engine marketing has gone mainstream with a vengeance.

That said, the mainstream still has some catching up to do. Here, we've selected six charts and a heatmap that demonstrate some of the data that could prove of practical use for marketers seeking to improve search results and budgeting.

Chart I: SEO Spending as % of Paid Search



Source: MarketingSherpa, Search Marketing Benchmark Survey, August 2006, Merrill Lynch, Internet Advertising Report, June 2005, and Piper Jaffray, Internet Industry Report, January 2006

We admit it – we were wrong. In last year’s Guide, we confidently predicted that based on then year-over-year search engine optimization (SEO) firm revenues growth of 124% that SEO would break the billion-dollar ceiling in 2006.

Well, it just goes to show that we should stick with doing what we’re best at – real-life data for the here and now – rather than attempting forecasts. Because no one, us least of all, dreamed the SEO industry would sink to a puny 6.7% growth rate so suddenly.

The big marketing debate over SEO has never been whether or not to do it. It’s self-evident that you’d want your site to appear near the top of free rankings for keywords important to your brand. Instead, the debate has always been whether to outsource or handle SEO in-house.

According to this year’s revenues, the keep-SEO-in-house school of thought is winning. This is amply borne out when we examine the actual percent of total search marketers who run SEO in-house. Last year that percent was about 74% and this year it’s ... 74%.

Any growth in the SEO outsourcing industry has mainly come from current accounts getting larger and from general overall growth in search marketing as a whole.

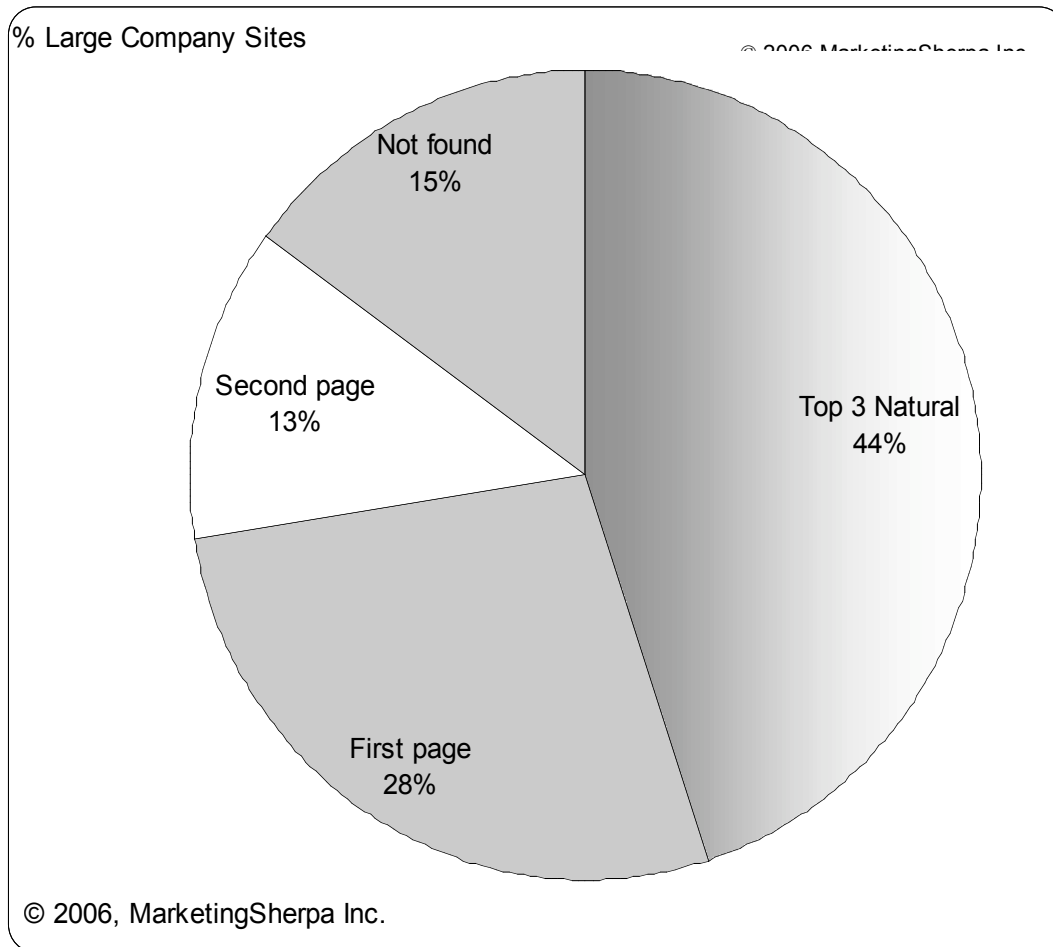
(Worth noting: we found nearly the same to be true for the paid search advertising (PPC) agencies as well. There, 73% of potential clients choose to keep campaigns in-house.)

If you work for an SEO or paid search agency, this data points to a potential slowing of business moving forward ... unless massive education campaigns or other factors can convince the mass marketers to work with outsourced experts.

If you’re a client-side marketer, this data points to a significant ongoing competitive opportunity for your online presence. According to our 2005 data, marketers who outsourced SEO saw a 110% lift in overall site traffic within six months, whereas marketers who handled SEO in-house saw a 73% lift.

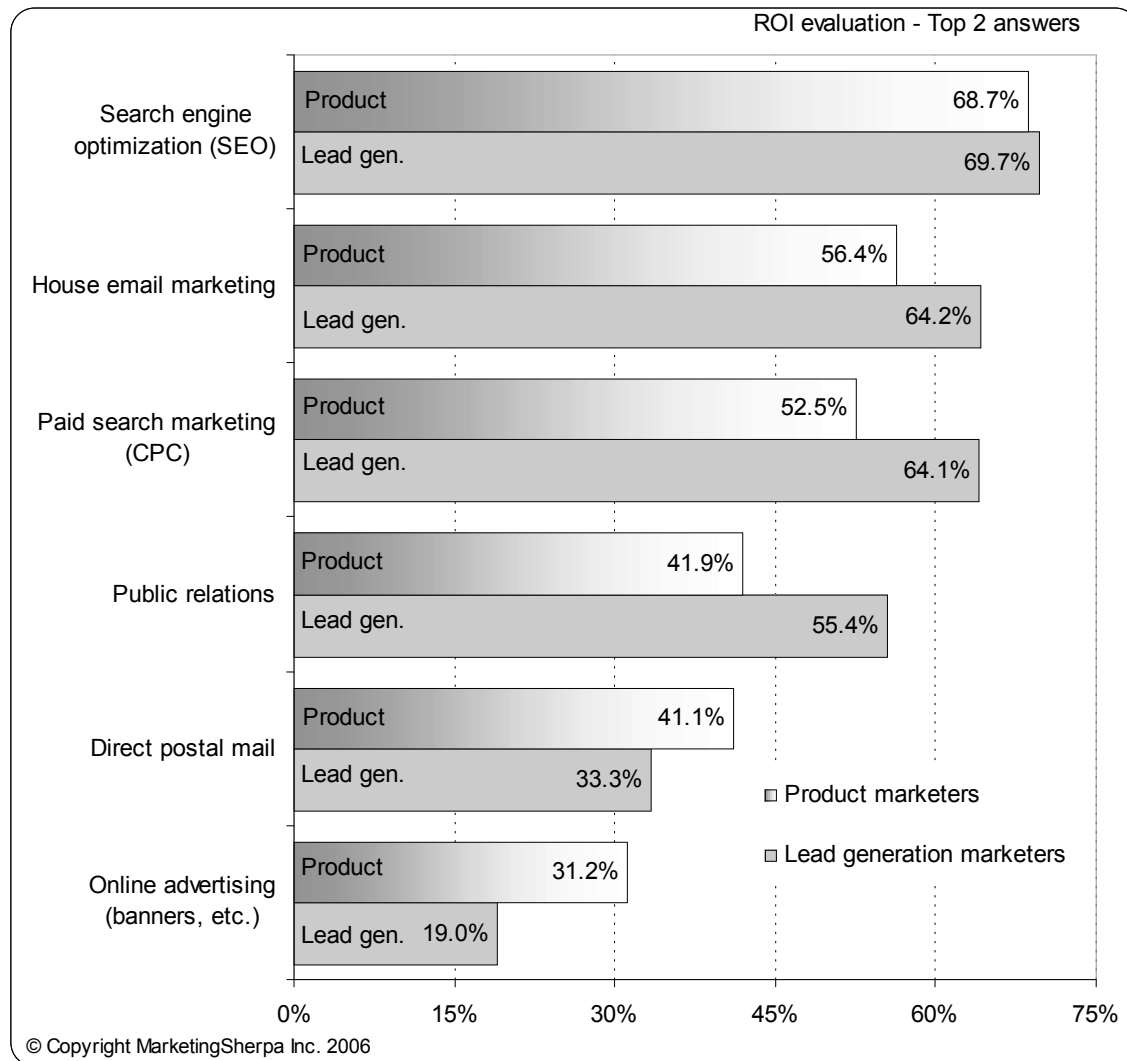
In short, if you hire an expert for SEO, you tend to get significantly better results. (Note: we do not offer SEO services, nor accept advertising from SEO firms. As a research firm, we have no reason – beyond the data – to be making this recommendation.)

This spring we conducted an observational study of the search optimization of the Web sites for the 44 largest business software firms in the U.S. These are technology companies with ample budgets and presumably Web savvy to understand the importance of SEO.

Chart II: Top 44 B-to-B Software Firms Search Optimization (or Lack Thereof)

As you can see from the chart above, 28% of them were not adequately search engine optimized for keywords central to their business. These big famous companies did not appear anywhere in first page of organic rankings for their technology type ... in a marketplace they dominated.

The lesson? No matter how famous your brand, you may be able to get better rankings and traffic (not to mention brand perception among prospects) if you test outsourcing SEO to an expert.

Chart III: Marketing Tactics' ROI – Top Ratings by Marketer Type

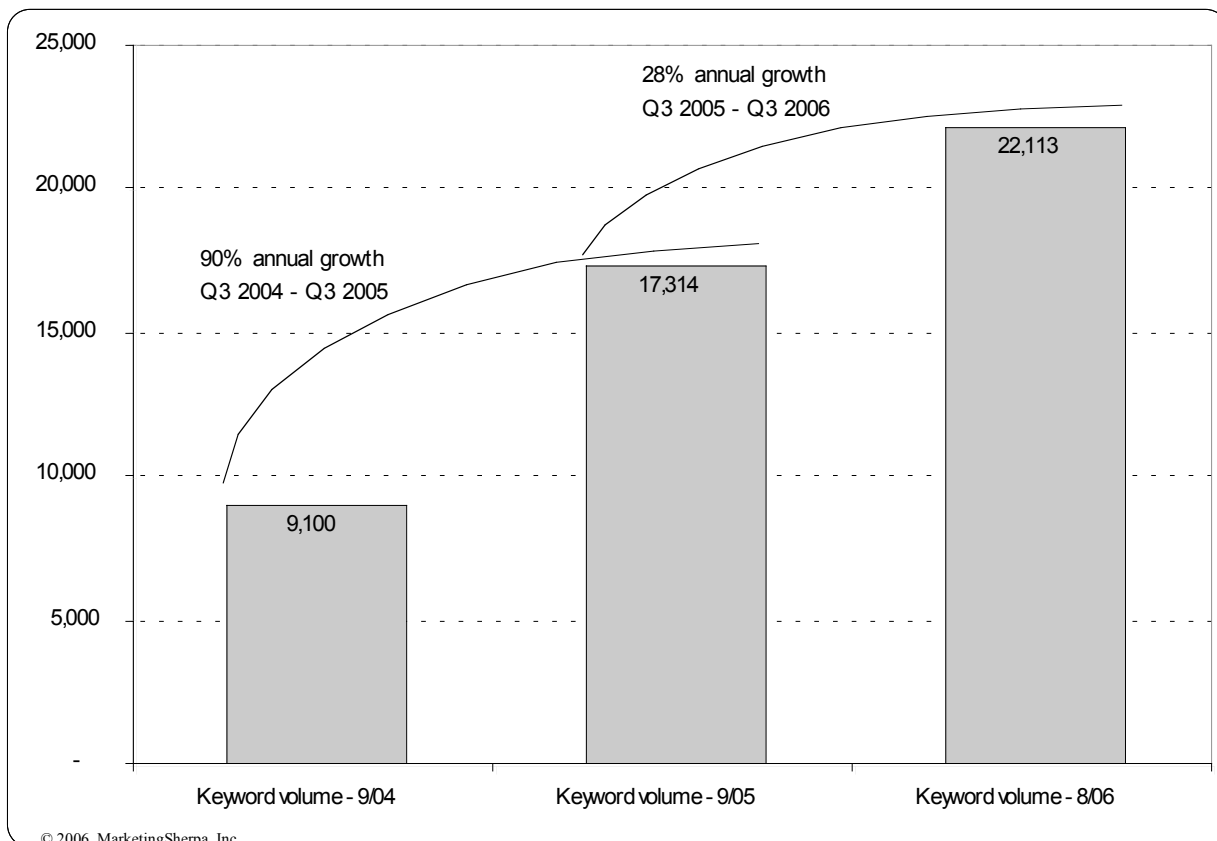
Here's some welcome perspective on the topic of search marketing. We asked 3,053 client-side marketers to rate the return on investment (ROI) of each of these marketing tactics. Respondents only rated the tactics their own companies had used and measured return on in the last 12 months – so this was based on real-life results.

Results above are separated by the type of offering – products such as books, PCs and travel tickets versus lead generation campaigns for offering such as financial services, real estate and high-ticket business offerings.

Some differences can be explained by what's considered a conversion activity for these marketers. Lead generation marketers may only measure leads received from soft/free offers (inevitably a higher response rate) while many product marketers only immediate sales directly attributable to the click at hand (inevitably a lower response rate.) Both systems of measurement have their weaknesses, sometimes overlooking branding and purchase intent factors.

That said, it's fascinating to review both the differences and the similarities between reported ROI ... with SEO leading ahead of house list email. MarketingSherpa's sibling Guide, Email Benchmark Guide, tracks expenditures on house email every year. So, we have ample data to state that although SEO may work as well or even better than email, it's certainly not being budgeted at nearly the level on average that email is. Perhaps it's time to rethink percent of spend by tactic?

Chart IV: Growth in Keyword Buys Slowing – Marketing to Consumers 2006



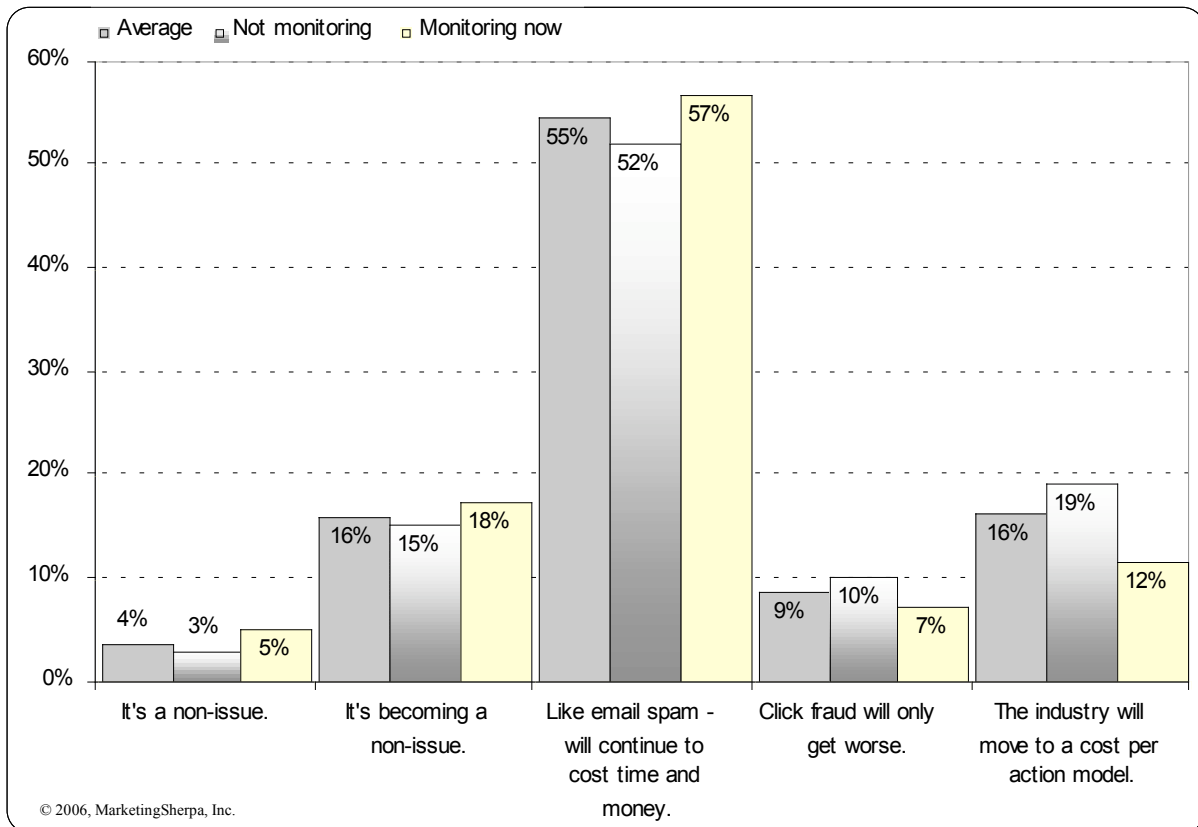
Key – the above chart reports data from marketers who target the consumer marketplace via search. As you'll see from the many B-to-B marketing charts also included further in this Guide, data is completely different in B-to-B.

Why is keyword growth slowing for B-to-C? Two factors are at least in part responsible – the first being that cost per click continues to rise for many markets. The days of easy-to-find five-cent clicks are for the most part behind us. In addition, the trend in 2005 was to expand search success by doing a “landgrab,” reaching out to every conceivable keyword to see what would stick. However, these massive campaigns are not as competitive anymore – anyone with the budget can do them with easy-to-use keyword expansion tools provided free of charge by search engine.

Plus, we have plenty of anecdotal evidence revealing that experienced search marketers

are refocusing on doing the best job possible with the most important keywords for their brands. They feel it's better to do an extremely good job of copywriting, bid management and landing page conversion optimization with fewer search terms than a slightly more slapdash job with more terms.

Chart V: How Will Click Fraud Be Resolved?

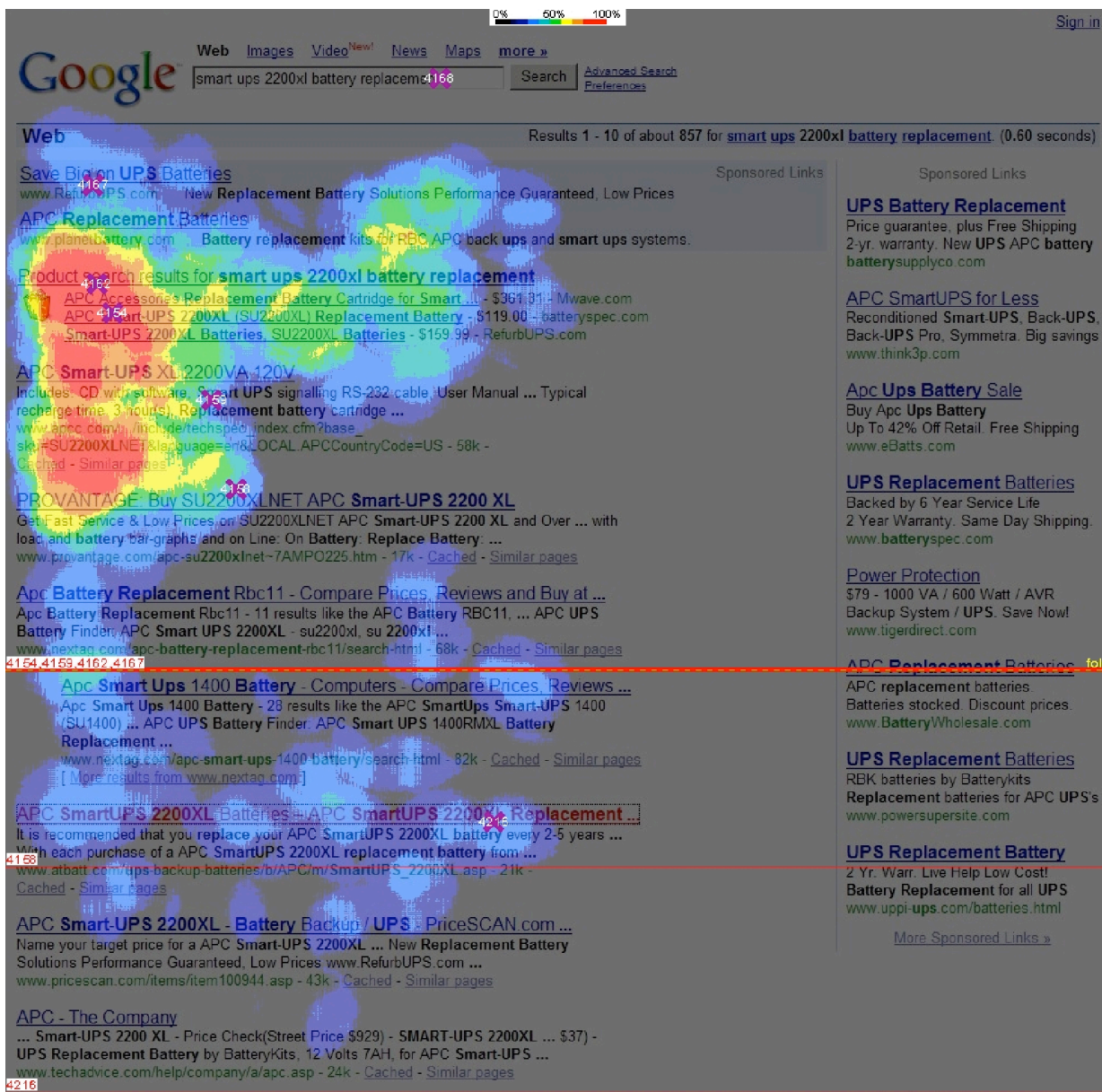


Are marketers terribly concerned about click fraud? Actually, according to this new data, it seems the bulk of search marketers are resigned rather than actively worried by it.

We have heard anecdotal data from some tight niche (often B-to-B) marketers – especially in extremely competitive industries – that increased costs and campaign management concerns caused by click fraud have caused them to pull budget from search and put it to another tactic altogether. As cost per click continues to rise, that trend may also continue. However for the mainstream marketer especially in ecommerce, SEM is well nigh irreplaceable for the bottom line.

Second tier and shopping engines currently have the most to lose due to marketers' perceptions over fraud. These engines already get far less of the budget than mainstream search and have smaller fraud-fighting departments. Some columnists and outspoken bloggers in the search marketplace have suggested that these engines should move to a CPA model, thus mitigating the risk of fraud to some extent. This would in effect turn second tier and shopping engines into affiliate marketers (which frankly some of them already are.) It will be interesting to watch developments over the next year.

Eyetracking Heatmap: How Searchers View the Google One Box



Here's just one of 11 new heatmaps in this year's Guide, revealing how actual consumers' eyes view listings. As you may be aware, the red blob is where most searchers looked directly; as colors change, the level of attention goes down. The "X" indicates where searchers clicked, and the red horizontal bar shows how far down folks scrolled to view listings.

Among the key findings for this year is the attention to which search users pay what we call the “bullet points” within top listings. Although this is a moving target, as of press time, Google often placed these subsidiary links under a header listing for:

- Local search results (especially critical for brick-and-mortar retailers)
- Google News headlines
- Stock symbols
- Scholarly articles
- Product lists drawn from product catalogs online
- Major site sections – sections of your site that get significant direct traffic and inbound hotlinks as nearly stand-alone topical sites on their own.

As noted, there’s a lot of flux in what specifically Google is placing in the One Box. For example, product hotlinks also contained in Froogle used to be there far more than they are at present.

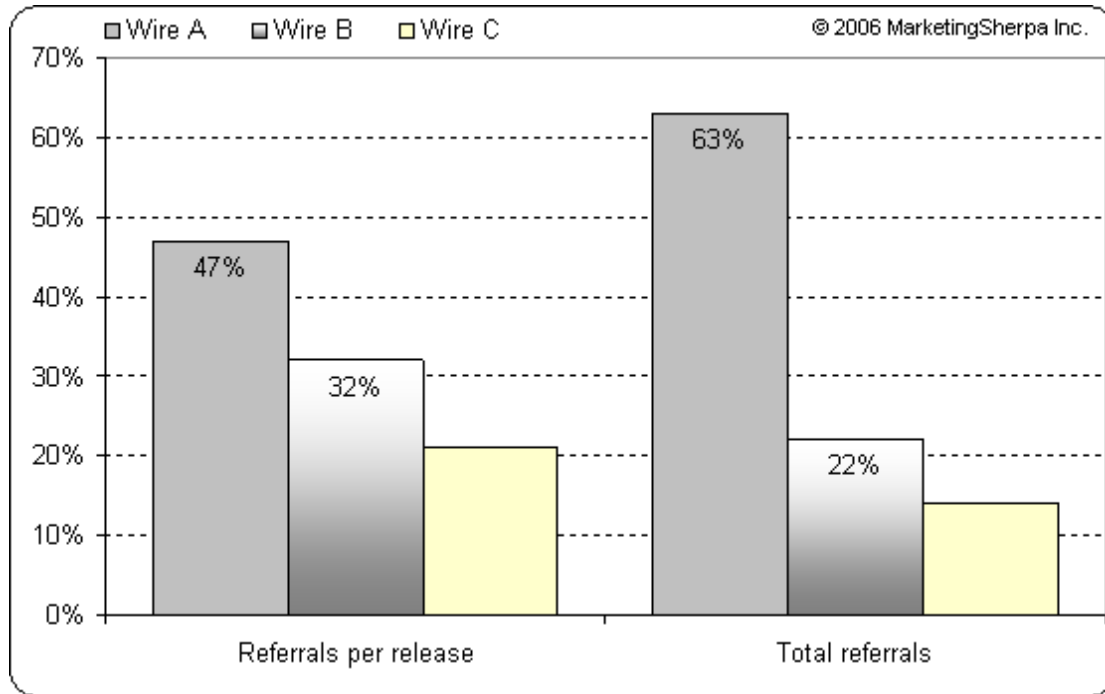
However, these eyetracking results indicate you can’t afford to wait for a time when Google stops changing the One Box (if indeed they ever stop changing.) Meet with your search optimization team today to determine how you can optimize your site to meet Google’s algorithms to appear in each of these. This may range from routinely putting more press releases on the wires to making sure each branch location of your organization is mapped and included in Google Local.

In addition, as our past eyetracking tests (also included in the appendix of this Guide) have revealed:

- There’s a “red triangle” of attention in the upper-left corner, beyond which eyes don’t stray. See the eyetracking section of this year’s Guide for an update on the size of that triangle.
- Hardly anyone ever looks directly at the right column on nearly every search engine (with the slight exception of some shopping comparison sites.) They may view with peripheral vision, and as every PPC marketer will attest, some clicks will result. However, the reason why top left search ads always get explosively better clickthrough rates than anything on the right is self-evident.
- Just as with your Web site, many searchers don’t bother to scroll down below the fold. This is why if you are in the top 10 organic rankings for a search term that’s critical to your brand, you need to duke it out to get as high up as possible. Being lower on the first page of results has never been enough.
- Folks don’t bother to read the entire headline for each search listing ... even though it’s extremely brief. The first two-three words of a listing pack a bigger wallop than words further on.

You should also review the demographic data by engine that's contained further in this Guide.

Chart VII: Role of Wire Services in Search Engine News Distribution



Over the past year, PR as it relates to search marketing has become one of the hottest topics in the field. We suspect the tactic gains popularity in two key ways.

First, PR practitioners, who've had to battle management suspicions for decades over measurement relating to the bottom line, are thrilled to at least be able to report on something as concrete as clicks and conversions. Second, in an era of rising cost per click, paid search marketers have a deep interest in any tactic that comes with a fairly low flat-rate price tag.

We'd heard – and even researched and written – Case Studies packed with anecdotal data on the efficacy of sending search engine optimized press releases on wire services that search engine news services — Google News, Yahoo! News, MSN News, etc. — might pick up on them.

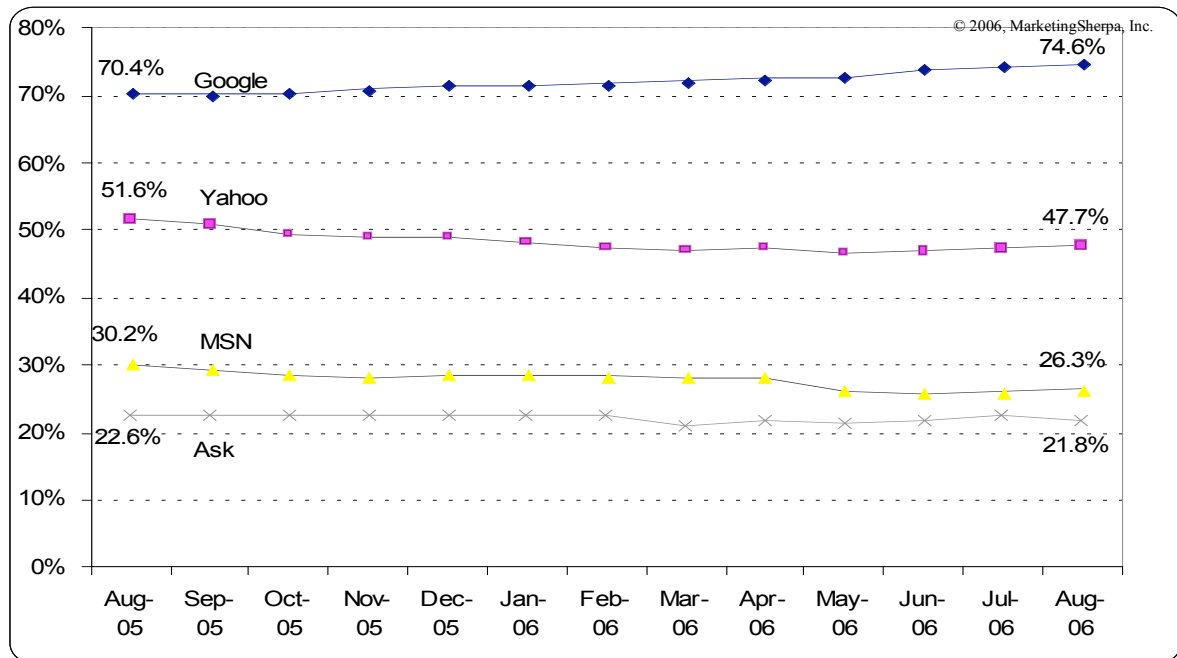
Inspired by these, we'd been attempting to optimize releases for three years in a slightly desultory fashion. However, galvanized by the tactics' success, we decided to conduct serious tests this summer in partnership with a specialist agency SEO-PR. Instead of sending out one or two releases per promotion, we wondered (among other tests) what would happen if we released the same exact press release over multiple wires?

The result as you can see above is that all wires performed for us. Some wires admittedly performed better than others. However, the difference in performance was in a very specific circumstance and shouldn't be taken as a gold star or black mark on any one wire service. The point is that they can bring different audiences to the table under different circumstances. Additionally, the cost per release per wire is low enough (generally in the low hundreds), that it's now proven well worth the investment to use multiple wires when sending a release, rather than just one.

For more information on our tests, including which keywords did surprisingly well, see the PR section of this Guide.

In the meantime, as always thanks to everyone in the search community who took the time to share their own real-life results data to help create this Guide. It's truly a community effort, with everyone helping to increase the working knowledge of proven tactics and results in search marketing.

As a result, may your own results be even stronger for 2007.

Chart VI: Search Engine User Loyalty: Share of Search Activity

Source: Compete Inc. for MarketingSherpa, August 2006

At first glance this chart may be confusing. It's NOT a representation of total search traffic received by each major engine (in that case Ask.com would be in the single digits). Instead, it measures search engine user loyalty by engine.

How? We asked Compete Inc to measure the activities of 2 million consumers in August 2006. (Note: All consumers had previously agreed to be on this research panel.) Then we watched to see how loyal a search engine user was to an engine once they had used it once. If, for example, they used Yahoo! and Ask.com in a given month, then Yahoo! and Ask.com were included in their potential search activity.

The degree to which they used each engine they'd used previously one gave their score. For example, if you relied on Yahoo! half the time and Ask.com half the time, your score for each would be 50%.

Lessons learned from this study include the above average loyalty of Google users – most tend to use it for three out of four searches. However, note that even in Google's ascendancy, it does not rule alone. The vast majority of searchers rely on more than one engine. So your brand must be present on more than one engine.

Moving on, we also suspect that users turn to different engines at different times of need. Consumers may have different engine preferences depending on whether they are conducting personal surfing versus educational searching versus shopping, etc. This points to a need for marketers to test different types of ads and offers on each engine, to determine which works best where.

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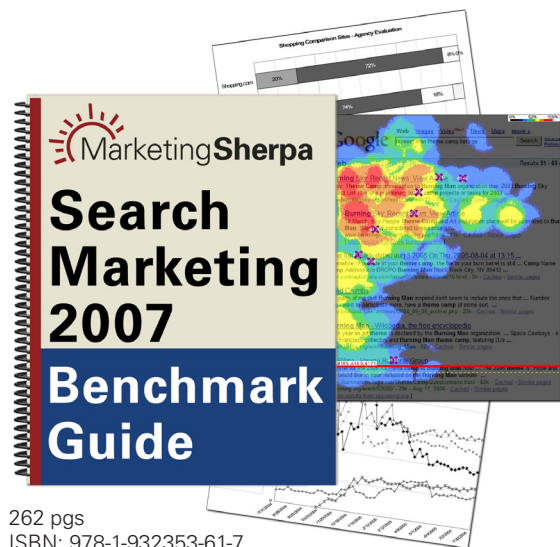
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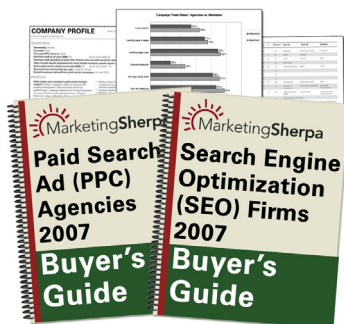
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