



***Executive Summary***

# **Search Marketing Metrics Guide**

**169 Useful Charts on SEO & PPC**

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## Introduction

Welcome to the first edition of our new *Search Marketing Metrics Guide*.

It's hard to believe that back when we started writing Case Studies about Internet marketing in early 2000, that someday search marketing would so completely dominate the landscape, secondary only to email. In fact, back then when we talked about search engine keyword buys, the buys were for traditional banners that appeared against search results on Yahoo!

For several years we cited an old university study that said 85% of Web surfers used search engines, and thus might not visit your site unless you were ranked high in organic (and later paid) search listings. While it was an inspirational number, I began to wonder how correct it still was.

So we set out to collect data from everyone we knew who might have some — including research firms, SEO specialists, paid search specialists, Web analytics firms, ad agencies, and of course, our own readers. This Guide is truly a community effort with charts and data from literally thousands of sources.

Sometimes that data contradicts itself. For example, some marketers maintain that conversions from paid listings are far better than conversions from organic (aka editorial/free) listings. They even have the data to prove it. Others say the exact opposite is true — and they have the data to prove it, too.

Here we're presenting both sides of the story — all the data that we judged both sufficiently reliable and relevant for your needs. We didn't try to merge or mingle data from separate sources together into one single number or chart. You can look at all of the charts and know exactly which numbers come from which sources. Then, you will be able to make your own call.

The overall goals of this Metrics Guide are to:

1. Give you the power to set a budget that make sense for your website(s), and the tools you need to help you get your budget approved by CEOs (who may not understand search marketing as well as you do).
2. Provide you with benchmark data to compare against your own costs, clicks, and conversions. We don't expect the benchmarks are perfect — no collection of numbers ever can be a perfect match to specific campaign results. But, having some sort of benchmark from your peers is far better than marketing completely in the dark!
3. Inspire you to continue upgrading your measurement tactics. It's hard to make the time for setting up campaigns for measurement, or even to read the reports on a regular basis once you've set them up. (We know plenty of marketers with thick stacks of Web analytics reports growing cobwebs in the corners of their offices because they are simply too busy getting out more campaigns to review the results of the old ones.)

Thanks for your support in launching this ambitious project. Without you, we would not have been able to publish this *Search Marketing Metrics Guide* at all.

Anne Holland  
Publisher, MarketingSherpa

P.S. An important note on the data:

As you may know, MarketingSherpa publishes Marketing Metrics Guides on several other topics, including email marketing and IT marketing. We've noticed a trend. Whenever we run a survey of our own readers, they tend to respond with better marketing results data than the industry average. As much as I'd love to believe that reading MarketingSherpa makes you so much smarter that your campaigns will exceed industry benchmarks, I suspected other forces might be at play.

Perhaps when marketers report their results, they only remembered their best results fondly. Or perhaps they round up to make things easier. I'm not sure.

Anyway, for this Metrics Guide, we added a new question to our survey of 3,007 marketers to help get realistic results: we asked them how accurate their data was.

For example, here's how they answered:

“Given that the data is all averages, please let us know how accurate you think it is:”

- a. My data is very accurate, given that it is an average = 25%
- b. My data is somewhat accurate = 40%
- c. My data is roughly accurate; I haven't looked at specific reports in a while = 24%
- d. My data is a complete guess = 11%

We carefully reviewed this data when creating charts based on the survey results. If self-reported inaccuracy caused the data to be significantly skewed, either we included the most accurate numbers, or we added a chart to show you how the accuracy-breakout affected answers.

P.P.S. Do you have data or questions for next year's edition? Contact us anytime at [feedback@marketingsherpa.com](mailto:feedback@marketingsherpa.com) I promise you, this email box is checked by a human being every day and we do respond to all incoming (non-spam) email from readers. Thanks.



## Executive Summary: Three Key Lessons

As you review the 169 charts and tables in this Metrics Guide, three overarching lessons will become self-evident:

### Lesson #1. Demographics: Search engines are not alike

Just like any other media property, from magazines to TV shows, each search engine has a remarkably distinct usership.

First, although search marketing is hot, hot, hot, you will miss vast portions of the American public if you rely on it entirely. Yes, obviously the poor, the less educated, tiny children, and the elderly are less likely to use search. However, the non-search-user universe is larger than you might think.

Of the 270 million men, women, and children in the US, *only an estimated 43% use search engines on a regular basis.*

Of the 57% of the total population who do not use search engines regularly, demographic breakdowns by search engine are pretty much what you might expect. Highly educated men with an interest in technology tend to use Google. Kids love Ask Jeeves, while older teens are making MyWay.com a hot property. Their moms are more likely to prefer MSN search.

Each of these demographics not only has a preferred engine, but it also has a distinct frequency of usage pattern. Google users run searches almost daily, constantly scanning the Web for news and information. MSN search users only look up things when they have a specific need, generally no more than a couple of times a week.

These usage patterns have reach and frequency implications that traditional media buyers are more used to considering than search marketers. However, it's our belief you too should start thinking beyond initially reported click and conversion results as soon as possible.

Why? Three reasons:

- Branding studies show that search text ads have a significant impact on brand awareness, regardless of whether a searcher clicks on them or not. The branding game is about using search for impressions. The more impressions, the more likely a prospect will someday click on a link for your brand somewhere (search, email, banners, etc.), or simply convert via a different channel.
- Click latency studies reveal that just as with other online ad mediums, search results generate "view throughs," i.e., people who see the URL and then type it directly into a search engine at another time.
- A cookie-wiping study of US online consumers showed as many as 38% are wiping cookies from their computers at least once a week. Generally, this is due to fear of adware and spyware. So, search-related metrics that use cookies for post-click conversion are tracking only a tiny slice of the picture.

### Lesson #2. SEO vs. Paid Search Ads

Search marketing investment is completely out of whack. According to estimates in this Guide, marketers will spend \$3.3 billion this year on paid search listings, compared to just \$238.5 million on site optimization services to get more and better rankings in organic search.

(Doing optimization in-house is not included in this figure, but in our experience, the ever-changing complexity of optimization doesn't allow do-it-yourselfers to really do SEO justice.)

At the same time, Google and Yahoo! search users are far more likely to click on organic links and ignore the paid ads entirely. (In fact, the data for Google shows that organic listings get almost three times more clicks than paid ads.)

Paid versus organic click conversion rates are more complicated. Some marketers swear organic search performs slightly better, others the opposite. The weight seems to be leaning toward organic being slightly more valuable than paid, but everything depends on your niche and your offer (as well as your landing page of course).

No matter what, if you are not investing in optimizing your site for organic listings, you are missing out on substantial potential clicks and the resulting conversions. You may also be reducing the effectiveness of your paid search ads, because they'll have much higher impact if seen on a results page featuring your brand name and URL prominently, repeatedly. If you dominate the screen (especially for high-conversion keywords) the clicks will come.

We urge marketers — except those focusing efforts solely on MSN search where paid listings are reportedly substantially more effective than organic ones — to consider optimization as their first line of attack, and use paid search for campaign enhancement and keyword mop up.

### **Lesson #3. Multiple Keywords: An overlooked marketing opportunity (for now anyway)**

Although almost 50% of search users have learned to type in three or more keywords per search, roughly 75% of marketers are still concentrating their paid buys on one or two keywords. Search user trends reveal that the number of multiple-word searches is on the rise year after year.

Many marketers dislike buying multiple word terms because with each additional word, traffic generally gets more and more segmented. Why put in the effort to buy terms only a tiny fraction of your prospects will ever search under? It helps if you do the math. Not only are three-plus word terms generally the cheapest per click, they also generally get vastly higher conversion rates. Where you might get a conversion rate of .5%-1.0% for a one-word term, four-plus word terms can convert anywhere from 6%-15% (depending on offer and landing page quality of course).

So for every one conversion you get from a general one-word term, you could be getting as much as 30 times the conversions from a highly-targeted four-word term.

We suspect as more marketers gain access to sophisticated campaign management tools, this situation will change. If you can conduct multiword campaigns fairly easily now, take as much advantage of the situation as you can.

### **Conclusion: Welcome to the days of... old-fashioned network television?**

On average, the 3,007 marketers we surveyed using search said they were dedicating 15% of their total budget to it. No, that's not 15% of their online budget, but of their total overall marketing spend online *and* offline.

When that big a slice of your pie is dedicated to a single tactic, there are inherent dangers if that tactic gets more expensive or stops working as well.

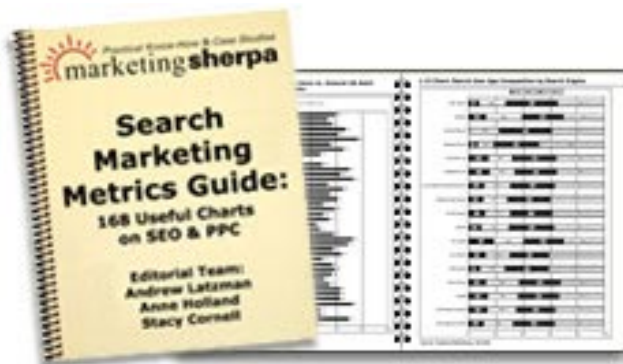
What happens if per click costs continue to rise sharply; if search engines change their organic algorithms so profoundly that currently optimized sites plummet in rankings (as happened to many after Google's now-infamous Florida update in late fall 2003); if a hacker succeeds in crashing any one of the top search engines for more than a few minutes; if, if, if...?

Search marketing is so critical to some businesses (in particular eretail) that marketers must be increasingly wary of these risks.

At the same time, the search engines that now have enormous power over thousands of marketers' bottom lines are limited to just a handful of players. You'll see a lot of booths at trade shows, such as AD:TECH, with smaller companies either feeding paid listings or carrying them. However, according to the metrics in this Guide, they are small fries indeed. Think about Cable TV... in the 1970s.

Google, Yahoo!, MSN search, AOL, and Overture: these are becoming the equivalent of old-fashioned network television. The medium that started out promising "500 channels" is now turning into a very few powerful ones. Some marketers don't worry about this much, primarily because the most dominant player, Google, has been careful to maintain such a warm-fuzzy brand image.

Start thinking about it.



# Search Marketing Metrics Guide: 169 Useful Charts on SEO & PPC

*New benchmark data on SEO and paid search ads for you to base your budget on (and compare results to)...*

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