

October 14<sup>th</sup>

#### Google Confidential and Proprietary

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# General Information on Participants

Appendix 

- Relevance
- Brand awareness Brand image
- Click behaviour

Brand Metrics

- What we've done Stimulus overview
- Methodology



Agenda



# Summary

- Advertising on Google leads to higher click rates on brands and websites.
- Even the click rate on brands listed top organic in the search results is exceeded by adding sponsored links.
- Multiple presence of brands on a Search Engine Result Pages leads to higher click rates.
- Sponsored links on Google have a positive effect on brand & ad awareness and brand recall.
- Presence in Google's search results has a positive effect on brand image.
- Sponsored links elevate the brand relevance for the next purchase.
- All positive effects are measured for branded as well as for generic search queries.

## Methodology



- Target group: Internet user in Denmark, aged 14 years and older
- Sample: n= 1,376 Internet users, in each of the 11 test cells at least 100 Interviews were conducted.
- Methodology:
  - Online Questionnaire
  - Equal structure weighting by age, gender, education, frequency of online access, frequency of online purchase, usage of Google and YouTube, product usage, income and household size
  - Experimental research design; detailed description on the following charts
  - Due to cumulating four brands the results are based on 5,504 Search Tasks
- Period of analysis:
  - Fieldwork: from September 1<sup>st</sup> to September 15<sup>th</sup> 2010
  - Final Report: October 15<sup>th</sup>, 2010
- Research company: TNS Infratest

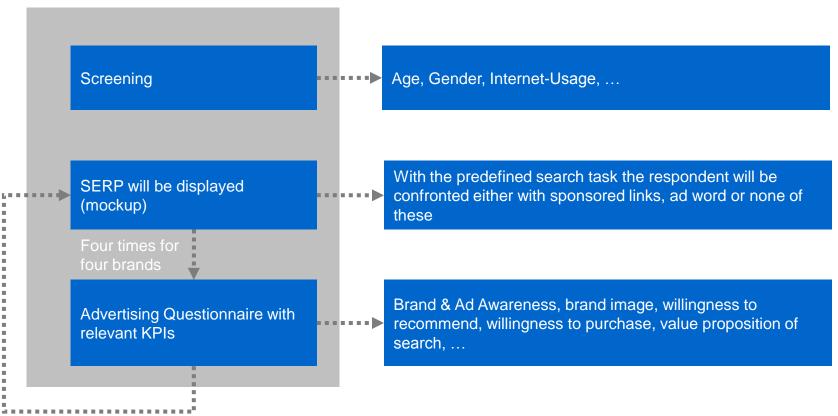
### What we've done

Flow of session – Description of approach



# Each respondent will respond to screening questions, click on four mock-ups and provide answers to the relevant KPI's.

20 Min. Interview

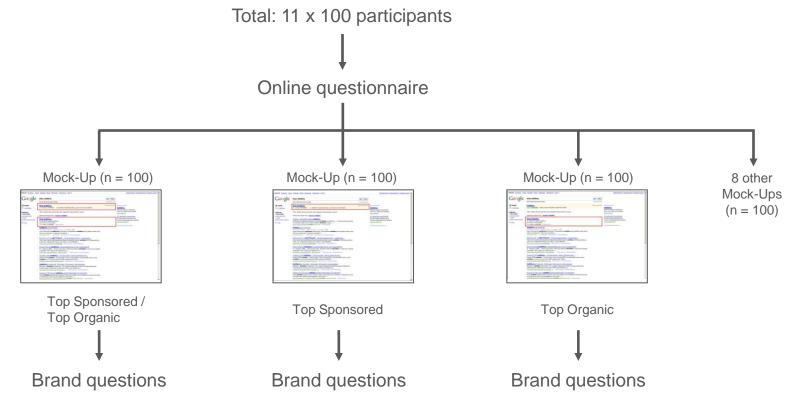


### Study Design



Stimulus: Mock up of Google SERP to show the role of position and branding of search results on relevant brand metrics.

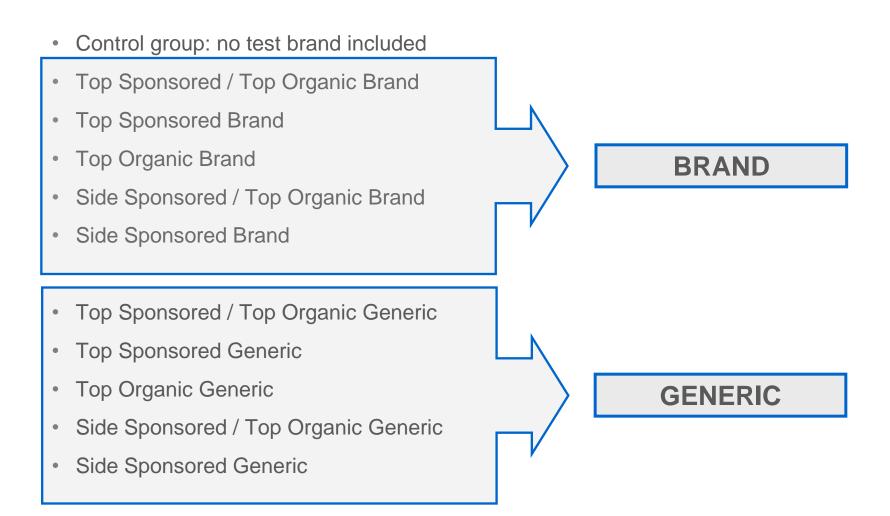
After having seen the stimulus for each brand a questionnaire covering these brand metrics was conducted.



## **Stimulus Overview**

### **Stimulus Overview**



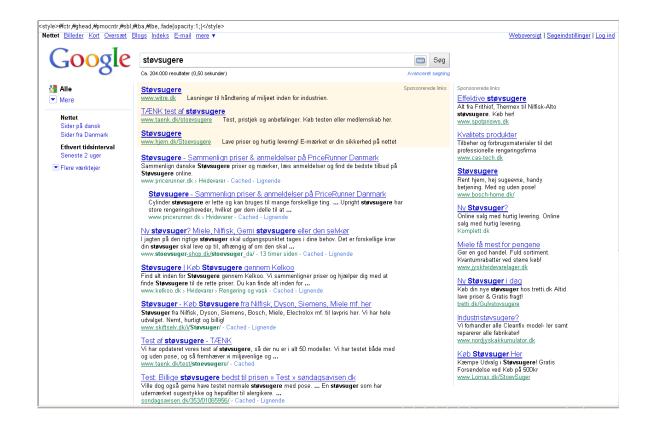


### Example – Screenshot (1/3)



#### Example of a Control Group: Search Engine Result Page.

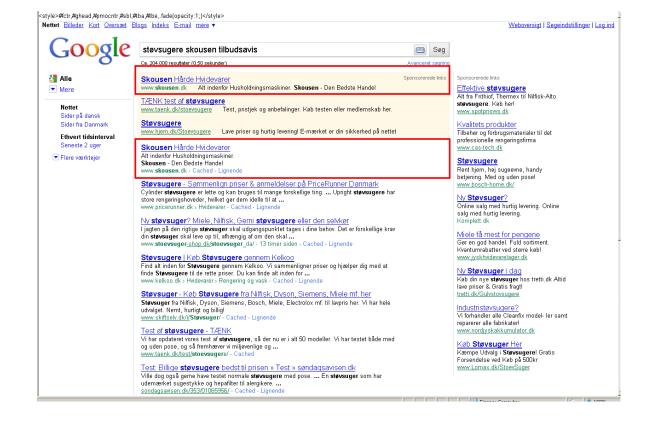
**Task Example** 





Example of a Top Sponsored / Top Organic Brand: Search Engine Result Page.

**Task Example** 

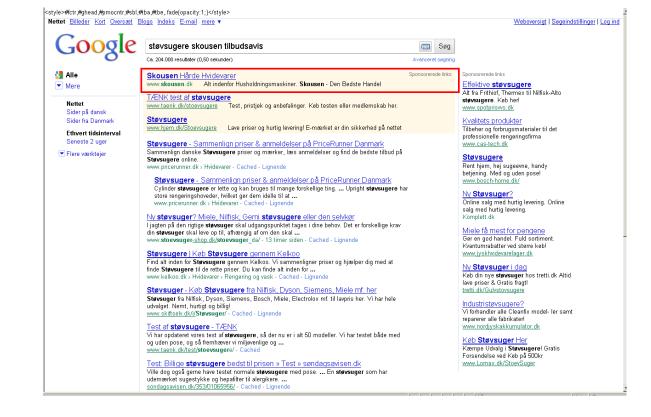


### Example – Screenshot (3/3)



### Example of a Top Sponsored Brand: Search Engine Result Page.

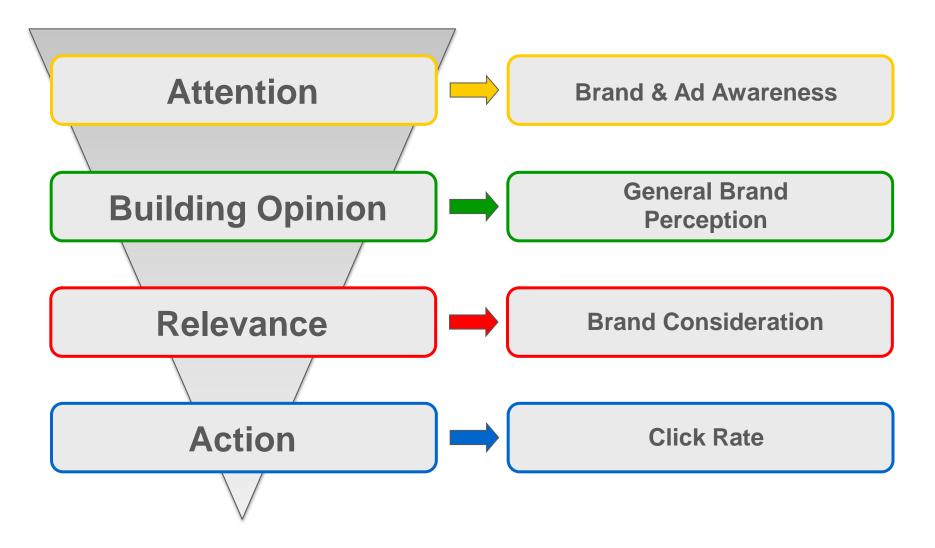
**Task Example** 



### Results

Selected Metrics on a cumulated Level

### **Brand Metrics – Analysis of four Brand Metrics**



Google

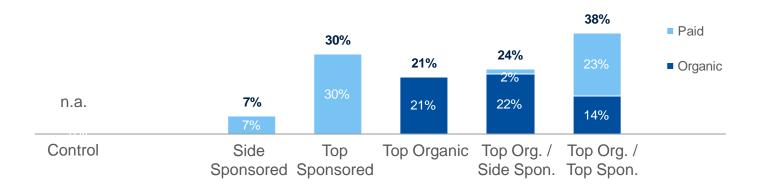
### Action

How do people react? Click Behaviour



Clearly Top Sponsored combined with Top Organic leads to the highest number of clicks / page visitors

Click Rate Aggregated Result for 4 Brands



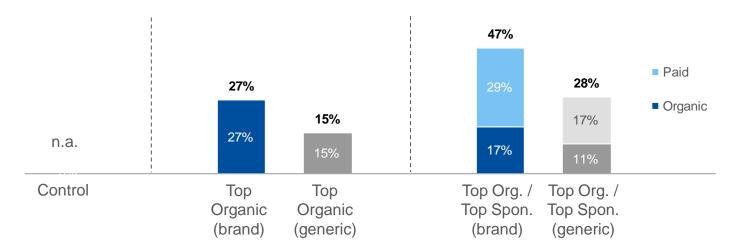
Click on the specific group

Base: All respondents n=1,376 – Tests Side Sponsored n=1,001; Tests Top Sponsored n=994; Tests Top Organic n=996; Tests Top Org. / Side Spon. n=1,009; Tests-Top Org. / Top Spon. n=1,000



Top Sponsored combined with Top Organic exceeds Top Organic. Branded search queries are clicked more likely.





Click on the specific group

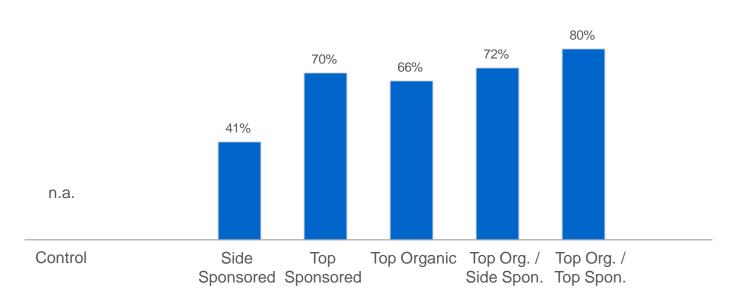
Base: All respondents n=1,376 – Tests Top Organic (generic) n=496; Tests Top Organic (brand) n=500; Tests Top Organic/Top Sponsored (brand) n=500; Tests Top Organic/Top Sponsored (generic) n=500

### Attention

Brand and Ad Awareness

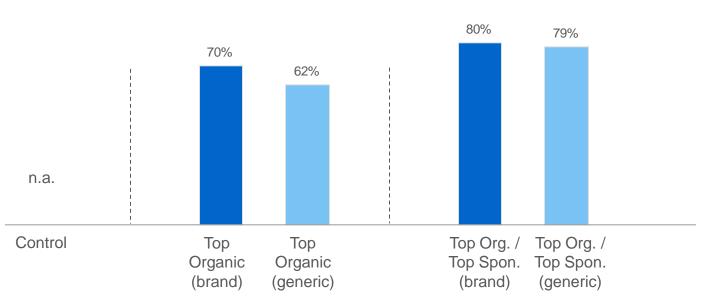


Top Sponsored and Top Organic links receive the highest attention and lead to the best recall.



Brand & Ad Awareness: Aggregated Result for 4 Brands

Q204: Which of the following brands of ... do you remember seeing on the search engine results page you just viewed? Base: All respondents n=1,376 – Tests Side Sponsored n=1,001 ; Tests Top Sponsored n=994; Tests Top Organic n=996; Tests Top Org. / Side Spon. n=1,009; Tests Top Org. / Top Spon. n=1,000 Top Sponsored combined with Top Organic outpaces the awareness and recall of Top Organic only.



Brand & Ad Awareness: Aggregated Result for 4 Brands

Q204: Which of the following brands of ... do you remember seeing on the search engine results page you just viewed?

Base: All respondents n=1,376 – Tests Top Organic (generic) n=496; Tests Top Organic (brand) n=500; Tests Top Organic / Top Sponsored (brand) n=500; Tests Top Organic / Top Sponsored (generic) n=500

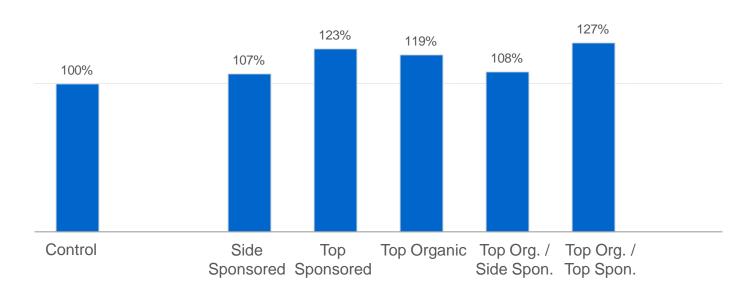
Google

## **Building Opinion**

How does position and brand influence general brand perception?



Presence on Googles result pages has a positive effect on brand image. Combined organic and paid presence is recommended.

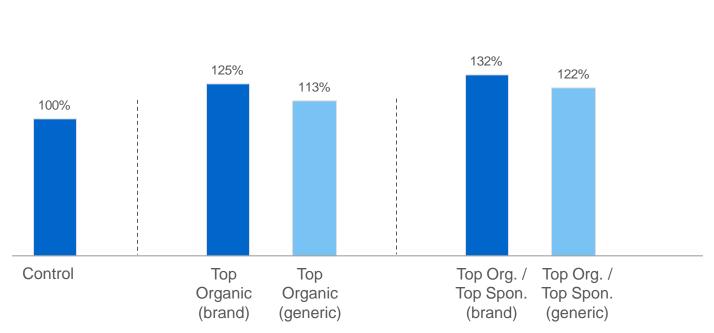


Index Brand Image: Aggregated Result for 4 Brands

Q207: What is your general opinion about the following brands? 1: have an excellent opinion to 5: have a poor opinion Base: All respondents n=1,376 – Tests Control n=504; Tests Side Sponsored n=1,001; Tests Top Sponsored n=994; Tests Top Organic n=994; Tests Top Org. / Side Spon. n=1,009; Tests- Top Org. / Top Spon. n=998



The positive effect of Google on brand image holds true for generic as well as for branded search.



Index Brand Image: Aggregated Result for 4 Brands

Q207: What is your general opinion about the following brands? With 1 I have an excellent opinion to 5 I have a poor opinion

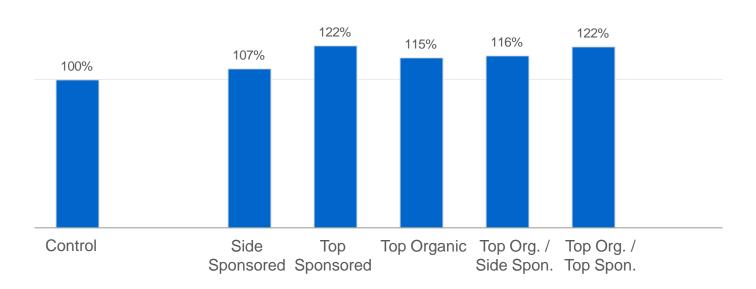
Base: All respondents n=1,376 – Tests Control n=504; Tests Top Organic (generic) n=495; Tests Top Organic (brand) n=499; Tests Top Organic / Top Sponsored (brand) n=499; Tests Top Organic / Top Sponsored (generic) n=499

### Relevance

How does position and brand influence brand relevance?



Presence in Google's search results has a positive effect on the brand relevance.



Index Relevance: Aggregated Result for 4 Brands

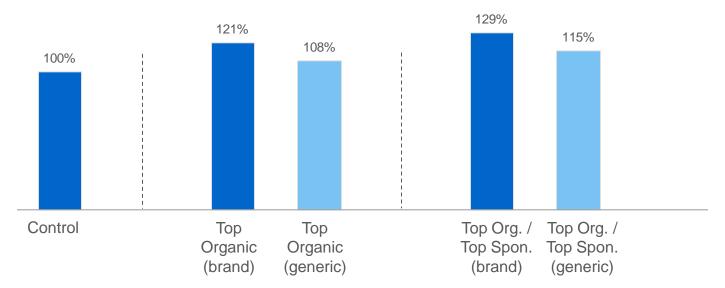
Q208: From the list below, indicate which of these brands you would consider if you were looking to purchase e.g. charterferie with 1 being highly likely to consider and 5 being highly unlikely to consider Base: All respondents n=1,376 – Tests Control n=504; Tests Side Sponsored n=1,001; Tests Top Sponsored n=994; Tests Top Organic n=994; Tests Top Org. / Side Spon. n=1,009; Tests-Top Org. / Top Spon. n=998

Source: TNS Infratest



Regardless if branded or generic - Presence in Googles search results has a positive effect on the brand relevance.

Index Relevance: Aggregated Result for 4 Brands



Q208: From the list below, indicate which of these brands you would consider if you were looking to purchase e.g. charterferie with 1 being highly likely to consider and 6 being highly unlikely to consider. Base: All respondents n=1,376 – Tests Control n=504; Tests Top Organic (generic) n=495; Tests Top Organic (brand) n=499; Tests Top Organic / Top Sponsored (brand) n=499; Tests Top Organic / Top Sponsored (generic) n=499

Source: TNS Infratest

## **General Information on Sample**

### **Background information**



Age	14-19	20-29	30-39	40-49	50+
	8%	14%	19%	19%	40%
	N.AL.	<b>E</b>			
Gender	Male	Female			
	51%	49%			
Income *	Low	Medium	High	D.K./No answer	
	17%	47%	26%	10%	
Education **	Low	Medium	High	No answer	
	16%	39%	45%	0%	
Household size	1	2	3	4 or more	No answe
	23%	38%	17%	21%	1%
Children under 15y in HH	Yes	No			
	38%	62%			

\*Low: Less than DDK. 99.999; DDK. 100.000 - 199.999 Middle: DDK. 200.000 - 599.999; High: DDK. 600.000 and more

\*\*Low: Primary and lower secondary school 7 year, Primary and lower secondary school 8 to 10, Middle. Middle school / the Danish "Realeksamen" or "Præliminæreksamen", Upper Secondary School/Higher Preparatory Exam/Higher Commercial Exam years, Basic/final vocational training; High: Higher education (less than 3 years), Higher education, i.e. BA level + ( 3 to less than 5 years ), Higher education, i.e. MA level + ( 5 years or more ) Base: Total n=1.376.

Source: TNS Infratest

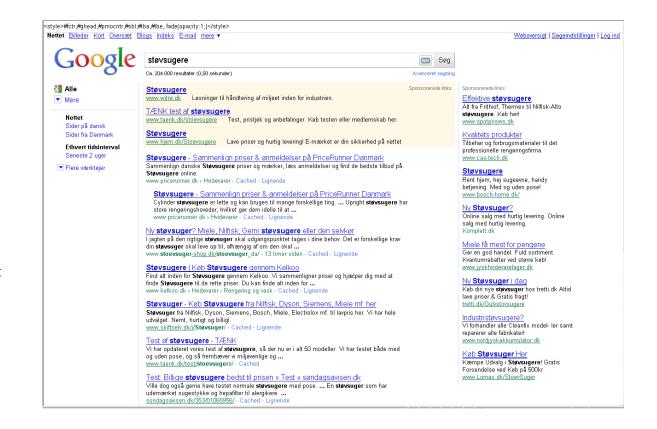
## Appendix

Stimulus Example for Each Position

### Screenshot

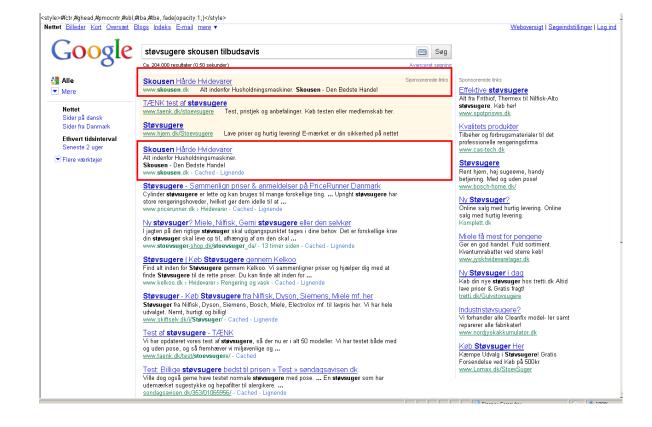
#### Example of a Control Group: Search Engine Result Page.

#### **Task Example**



# Example of a Top Sponsored / Top Organic Brand: Search Engine Result Page.

**Task Example** 

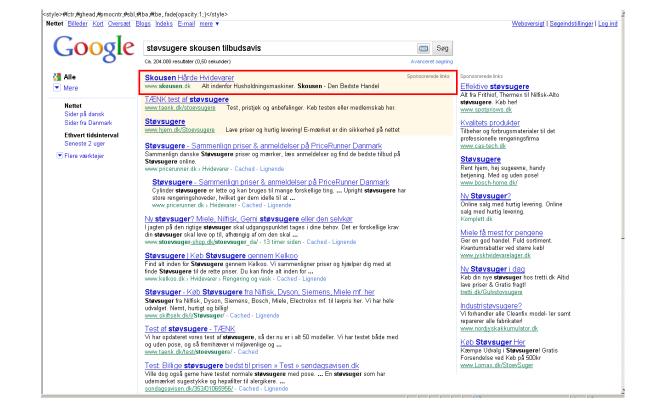


### Screenshot



#### Example of a Top Sponsored Brand: Search Engine Result Page.

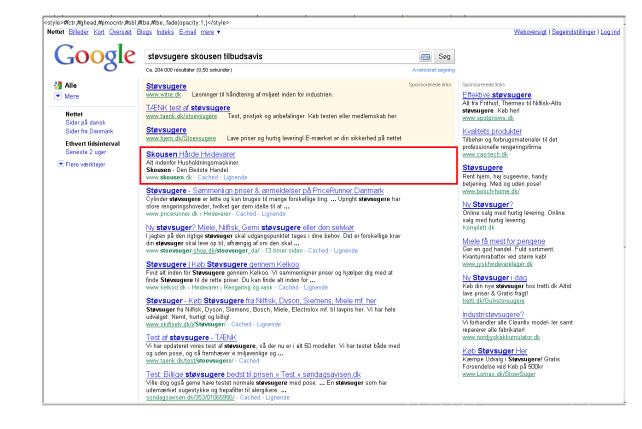
**Task Example** 





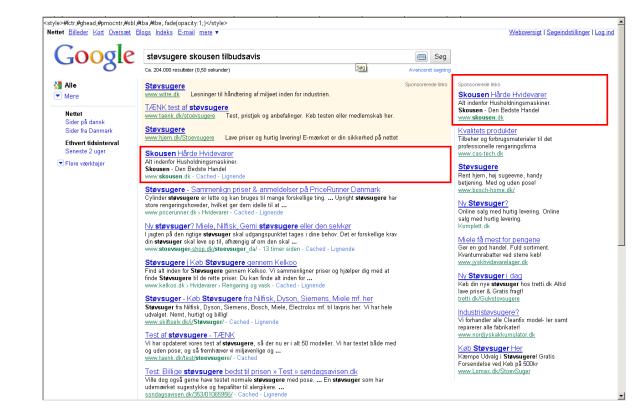
#### Example of a Top Organic Brand: Search Engine Result Page.

#### **Task Example**



# Example of a Side Sponsored / Top Organic Brand: Search Engine Result Page.

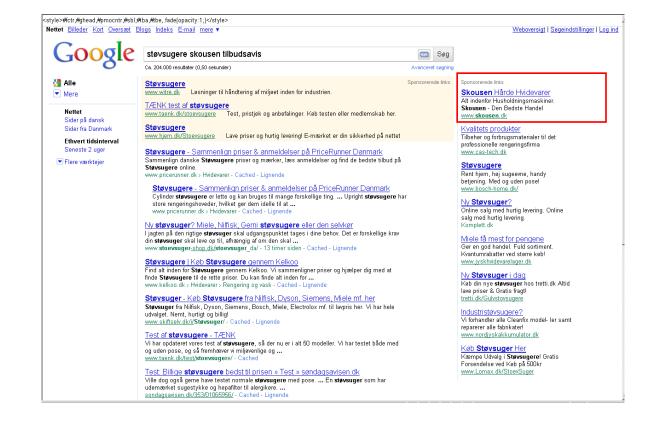
**Task Example** 





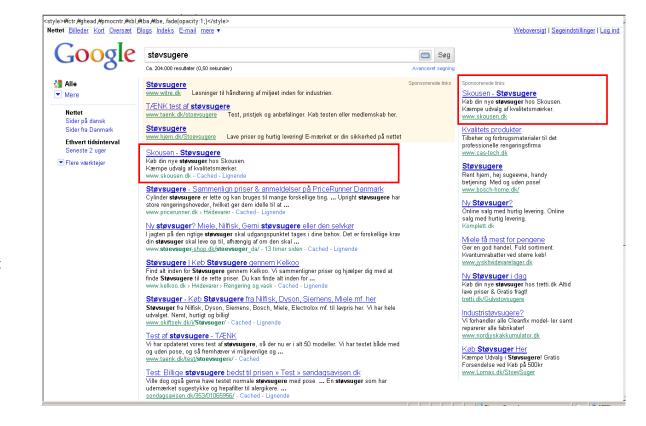
#### Example of a Side Sponsored Brand: Search Engine Result Page.

#### **Task Example**



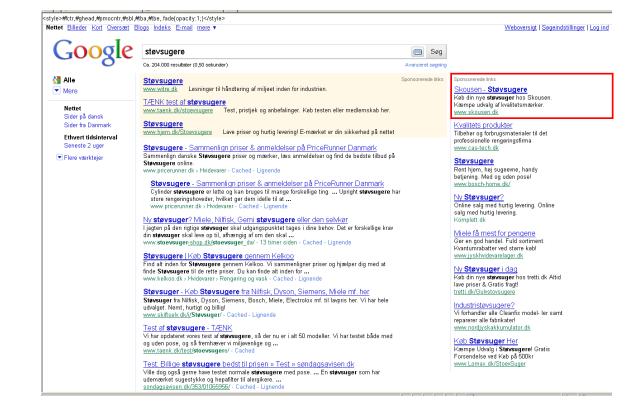
# Example of a Side Sponsored / Top Organic Generic: Search Engine Result Page.

**Task Example** 



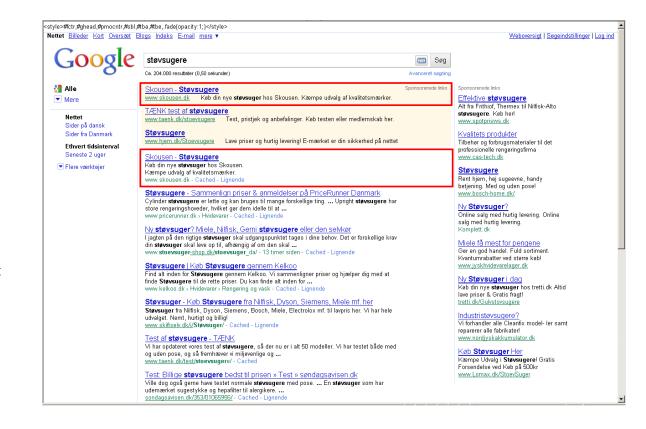
#### Example of a Side Sponsored Generic: Search Engine Result Page.

#### **Task Example**



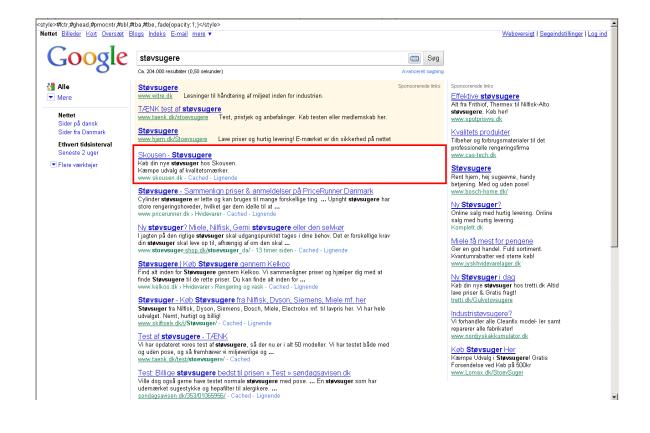
Example of a Top Sponsored / Top Organic Generic: Search Engine Result Page.

**Task Example** 



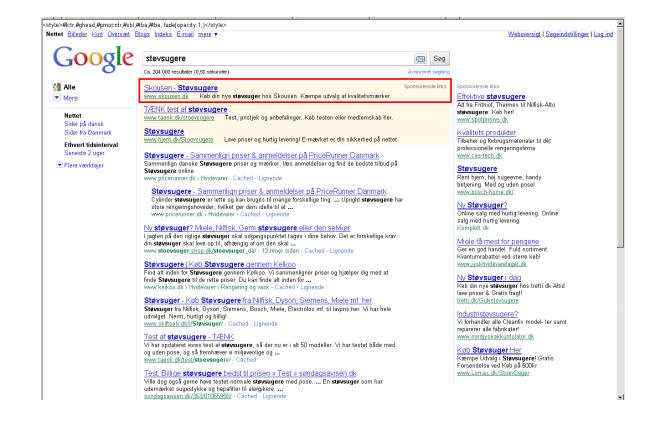
#### Example of a Top Organic Generic: Search Engine Result Page.

**Task Example** 



#### Example of a Top Sponsored Generic: Search Engine Result Page.

#### **Task Example**



### Google Thank you for your attention! Denmark – Brand Value of Search