

October 7th

Agenda

- Summary
- Methodology
- Brand Metrics
 - Click behaviour
 - Brand awareness
 - Brand image
 - Relevance
- General Information on Participants
- Appendix



Summary

- Advertising on Google leads to higher click rates on brands and websites.
- Even the click rate on Top Organic 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 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 Norway, aged 14 years and older
- Sample: n= 1,444 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 5,776 Search Tasks
- Period of analysis:
 - Fieldwork: from September 22th to September 28th 2010
 - Final Report: October 7th 2010
- Research company: TNS Infratest

What we've done

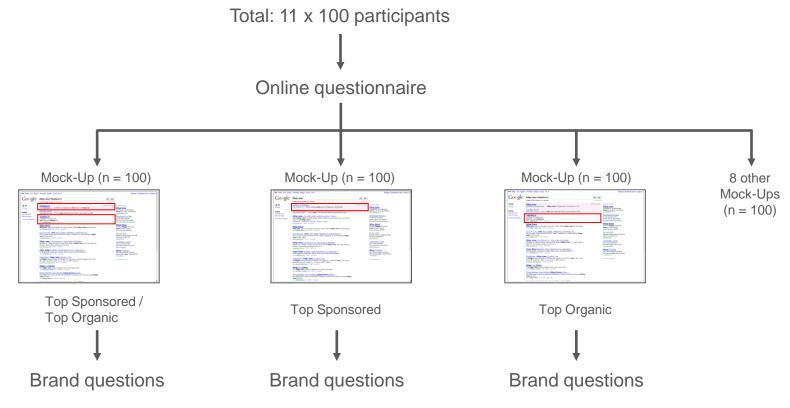
Flow of session – Description of approach

Study Design



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

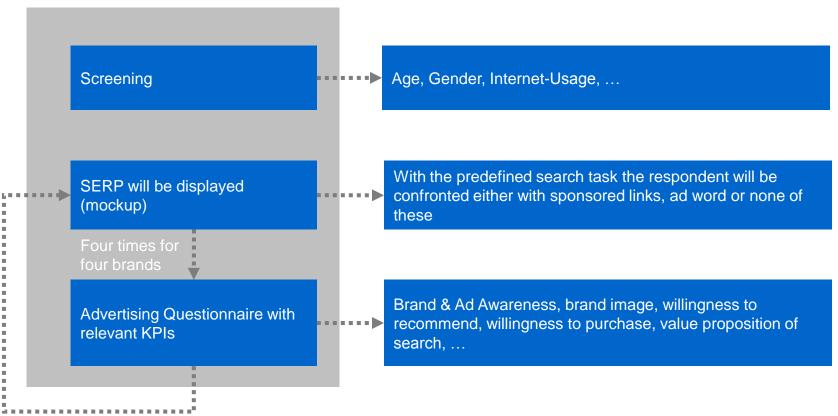
After having seen the stimulus for each brand a questionnaire covering these brand metrics was conducted.



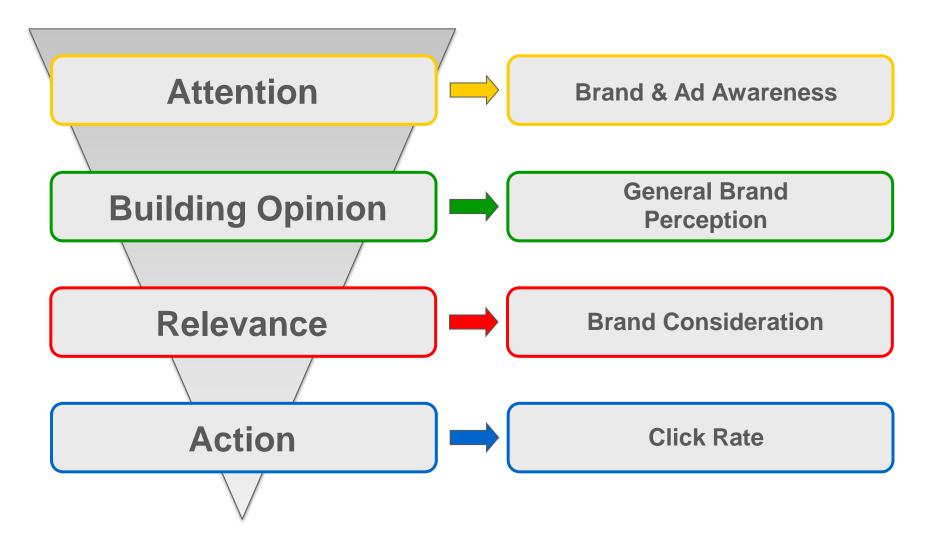


Each respondent will respond to screening questions, click on four mock-ups and provide answers to the relevant KPI's.

20 Min. Interview



Brand Metrics – Analysis of four Brand Metrics

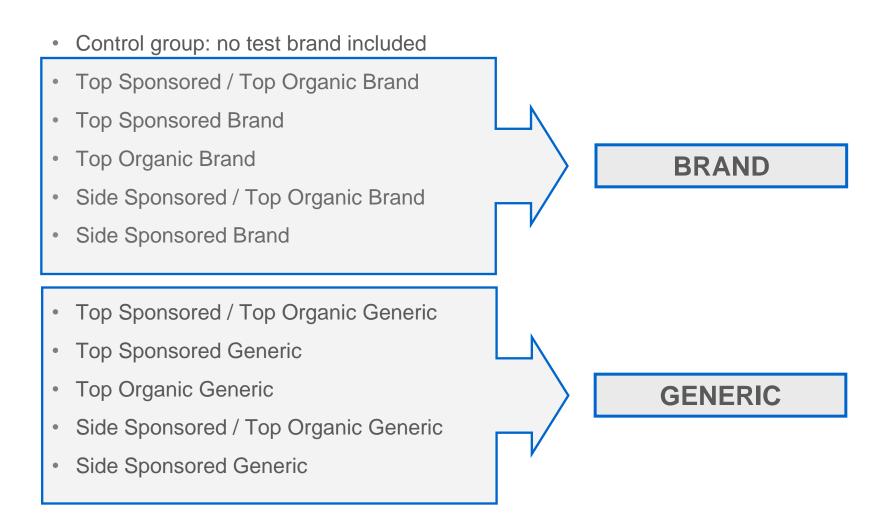


Google

Stimulus Overview

Stimulus Overview





Part 1 Cumulated Overview

Selected Metrics on a cumulated Level

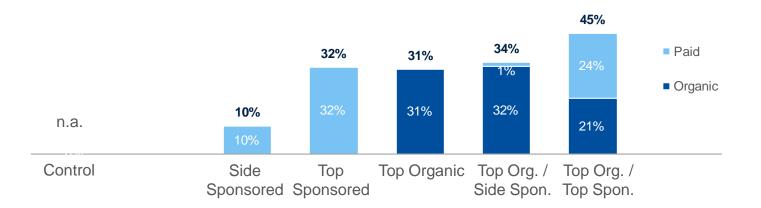
Action

How do people react? Click Behaviour



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





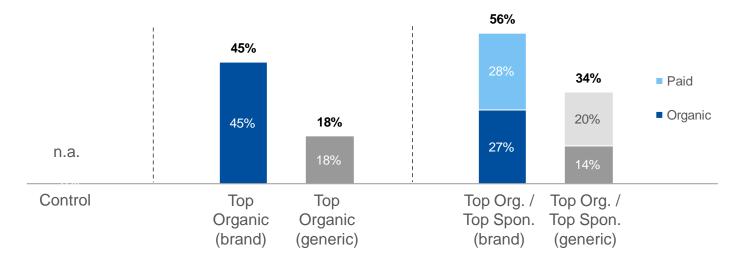
Click on the specific group

Base: All respondents n=1,444 – Tests Side Sponsored n=1,045; Tests Top Sponsored n=1,057; Tests Top Organic n=1,046; Tests Top Org. / Side Spon. n=1,052; Tests-Top Org. / Top Spon. n=1,046



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=1,444 – Tests Top Organic (generic) n=523; Tests Top Organic (brand) n=523; Tests Top Organic/Top Sponsored (brand) n=523; Tests Top Organic/Top Sponsored (generic) n=523

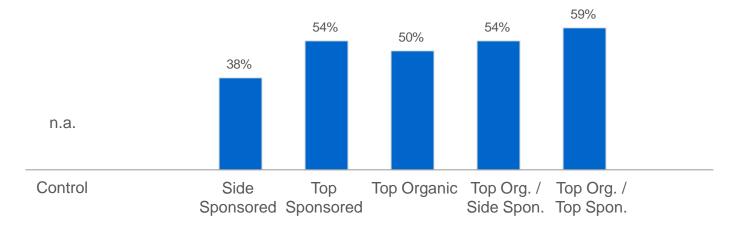
Attention

Brand and Ad Awareness



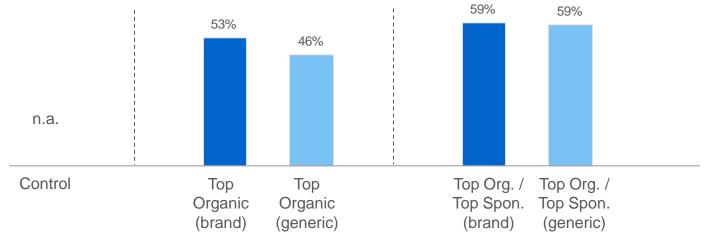
Top Sponsored and Top Organic links receive the highest attention and lead to the best recall.

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=1,444 – Tests Side Sponsored n=1,045 ; Tests Top Sponsored n=1,057; Tests Top Organic n=1,046; Tests Top Org. / Side Spon. n=1,052; Tests Top Org. / Top Spon. n=1,046 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=1,444 – Tests Top Organic (generic) n=523; Tests Top Organic (brand) n=523; Tests Top Organic / Top Sponsored (brand) n=523; Tests Top Organic / Top Sponsored (generic) n=523

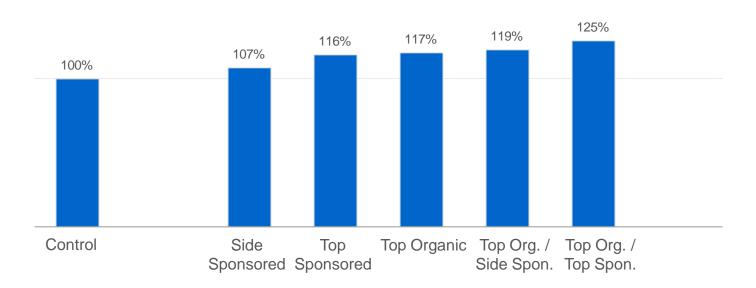
Google

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.

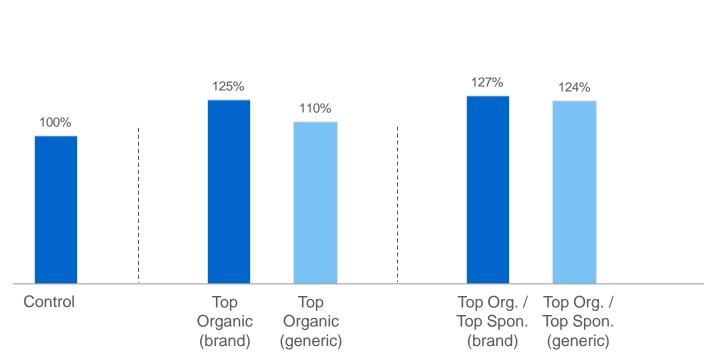


Index Brand Image: Aggregated Result for 4 Brands

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=1,444 – Tests Control n=530; Tests Side Sponsored n=1,045 ; Tests Top Sponsored n=1,057; Tests Top Organic n=1,046; Tests Top Org. / Side Spon. n=1,052; Tests- Top Org. / Top Spon. n=1,046



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

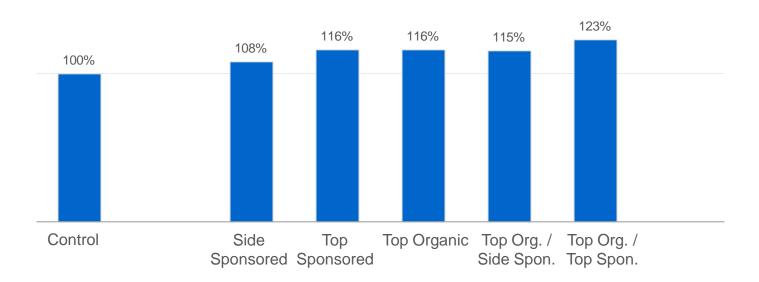
Base: All respondents n=1,444 – Tests Control n=530; Tests Top Organic (generic) n=523; Tests Top Organic (brand) n=523; Tests Top Organic / Top Sponsored (brand) n=523; Tests Top Organic / Top Sponsored (generic) n=523

Relevance

How does position and brand influence brand relevance?



Presence in Google's search results has a positive effect on the brand relevance – especially top sponsored and top organic combined.



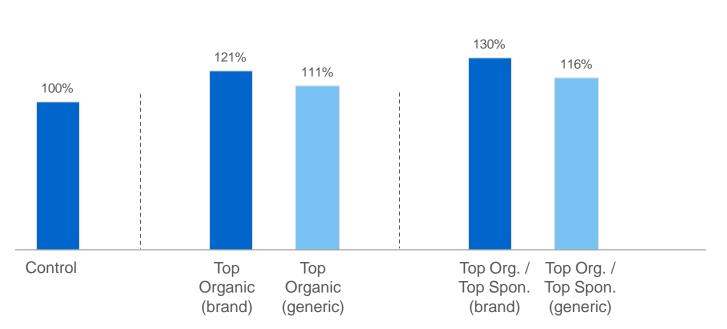
Index Relevance: Aggregated Result for 4 Brands

Q208: From the list below, indicate which of these brands you would consider if you were looking to purchase e.g. Träningskläder with 1 being highly likely to consider and 5 being highly unlikely to consider Base: All respondents n=1,444 – Tests Control n=530; Tests Side Sponsored n=1,045; Tests Top Sponsored n=1,057; Tests Top Organic n=1,046; Tests Top Org. / Side Spon. n=1,052; Tests-Top Org. / Top Spon. n=1,046

Source: TNS Infratest



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. Träningskläder with 1 being highly likely to consider and 6 being highly unlikely to consider. Base: All respondents n=1,444 – Tests Control n=530; Tests Top Organic (generic) n=523; Tests Top Organic (brand) n=523; Tests Top Organic / Top Sponsored (brand) n=523; Tests Top Organic / Top Sponsored (brand) n=523; Tests Top Organic / Top Sponsored (generic) n=523

Source: TNS Infratest

General Information on Sample



Age	14-19	20-29	30-39	40-49	50+
	5%	22%	21%	19%	33%
Gender	Male	Female			
	49%	51%			
Income *	Low	Medium		High	D.K / No answer
	16%	39%		30%	15%
Education **	Low	Medium		High	No answer
	10%	40%		49%	1%
Household size	1	2		3	4 or more
	23%	37%		15%	24%
Children under 15y in HH	Yes	No			
	38%	62%			

*Low: Less than 300.000 NOK; Middle: 300.000 NOK - 449.999; 450.000 NOK - 599.999 NOK; High: More than 600.000 NOK

**Low: Primary education; Middle: Secondary education; High: University/college Base: Total n=1,444

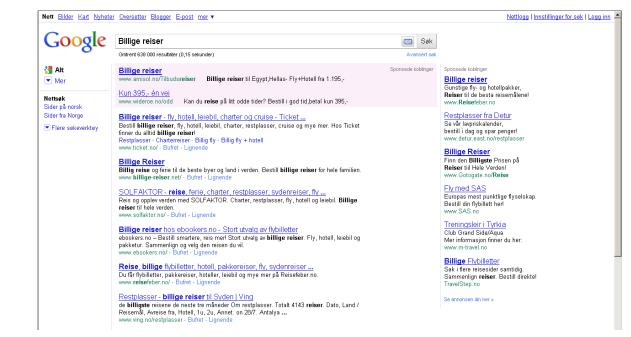
Appendix

Stimulus Example for Each Position

Screenshot

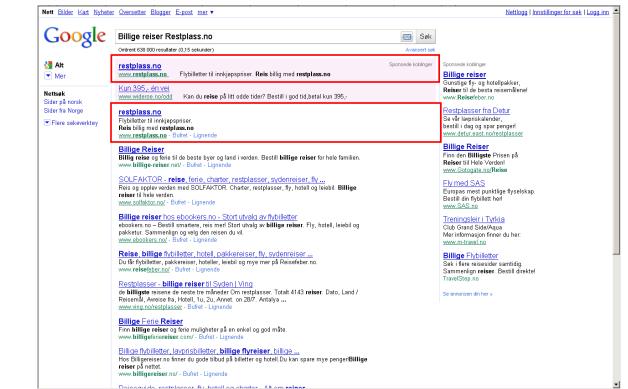
Example of a Control Group: Search Engine Result Page.

Task Example



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

Task Example

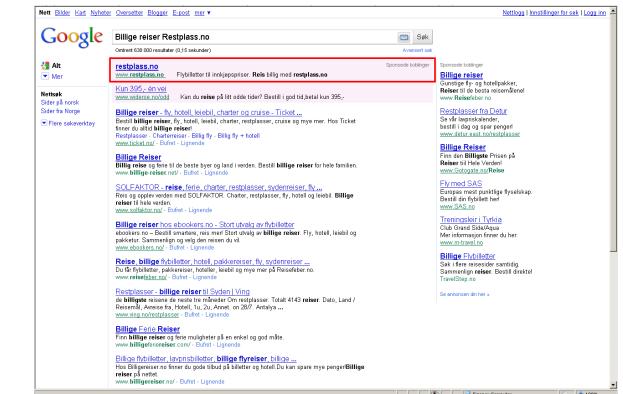


Screenshot



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

Task Example





Nettlogg | Innstillinger for søk | Logg inn 🎴

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

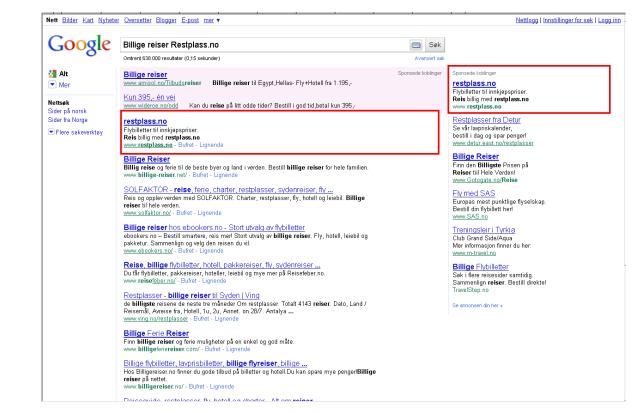
Nett Bilder Kart Nyheter Oversetter Blogger E-post mer

Task Example

Google	Billige reiser Restplass.no		Søk	
0	Omtrent 638 000 resultater (0,15 sekunder)	Ava	ansert søk	
🚰 Alt 💌 Mer	Billige reiser www.amisol.no/Tilbudsreiser Billige reiser til Egypt,Hellas- Fly+Hotell fra 1.195,- Kun 395 - én vei	Sponsede k	koblinger	Sponsede koblinger Billige reiser Gunstige fly- og hotellpakker,
Nettsøk Sider på norsk	www.wideroe.no/odd Kan du reise på litt odde tider? Bestill i god tid,betal kun 395,-			Reiser til de besta reisemålene! www.Reisefeber.no
Sider fra Norge ■ Flere søkeverktøy	restplass.no Flybilletter til innkjøpspriser. Reis billig med restplass.no www.restplass.no - Bufret - Lignende			Restplasser fra Detur Se vår lavpriskalender, bestill i dag og spar pengerl www.detur.east.no/restplasser
	Billige Reiser Billig reise og ferie til de beste byer og land i verden. Bestill billige reiser for hele familien. www.billige-reiser.net/ - Bufret - Lignende			Billige Reiser Finn den Billigste Prisen på Reiser till Hele Verden! www.Gotogate.no/Reise
	SOLFAKTOR - reise, ferie, charter, restplasser, sydenreiser, fly Reis og opplev verden med SOLFAKTOR. Charter, restplasser, fly, hotell og leiebil. Billige reiser til hele verden. www.solfaktor.no/ - Bufret - Lignende			Fly med SAS Europas mest punktlige flyselskap. Bestill din flybillett herl www.SAS.no
	Billige reiser hos ebookers.no - Stort utvalg av flybilletter ebookers.no - Bestill smartere, reis merl Stort utvalg av billige reiser. Fly, hotell, leiebil og pakketur. Sammenlign og velg den reisen du vil. www.ebookers.ng/ - Bufret - Lignende			Treningsleir i Tyrkia Club Grand Side/Aqua Mer informasjon finner du her: www.m-travel.no
	Reise, billige flybilletter, hotell, pakkereiser, fly, sydenreiser Du fär flybilletter, pakkereiser, hotellar, leiebil og mye mer på Reisefeber.no. www.reisefeber.nd/ = Bufet - Lignende Restplasser - billige reiser til Syden Ving			Billige Flybilletter Søk i flere reisesider samtidig. Sammenlign reiser . Bestill direktel TravelStep.no
	Resputatser - Dimiger reliser in Syder 1 ving de billigster reisene de neste ter måneder Om restplasser. Totalt 4143 reiser. Dato, Land / Reisemål, Avreise fra, Hotell, 1u, 2u, Annet. on 28/7. Antalya www.ving.no/restplasser - Bufret - Lignende			Se annonsen din her »
	Billige Ferie Reiser Finn billige reiser og ferie muligheter på en enkel og god måte. www.billigeferiereiser.com/ - Bufret - Lignende			
	Billige flybilletter, lavprisbilletter, billige flyreiser, billige Hos Billigereiser no finner du gode tilbud på billetter og hotell. Du kan spare mye penger Billige reiser på nettet. www.billigereiser.no/ - Bufret - Lignende			

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

Task Example

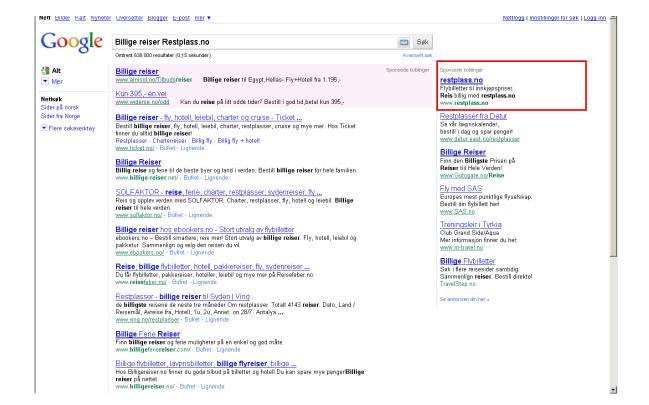


Screenshot

Google

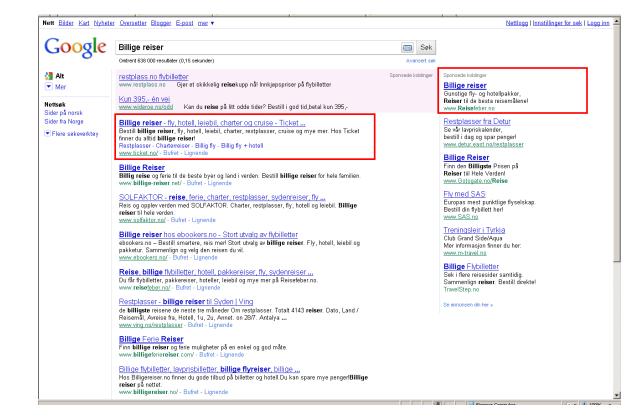
Example of a Side Sponsored Brand: Search Engine Result Page.

Task Example



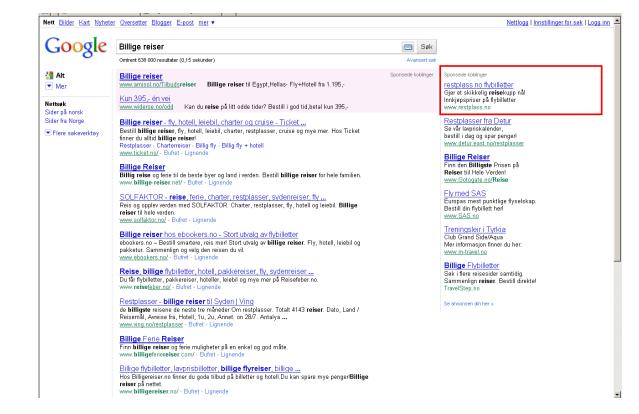
Example of a Side Sponsored / Top Organic Generic: Search Engine Result Page.

Task Example



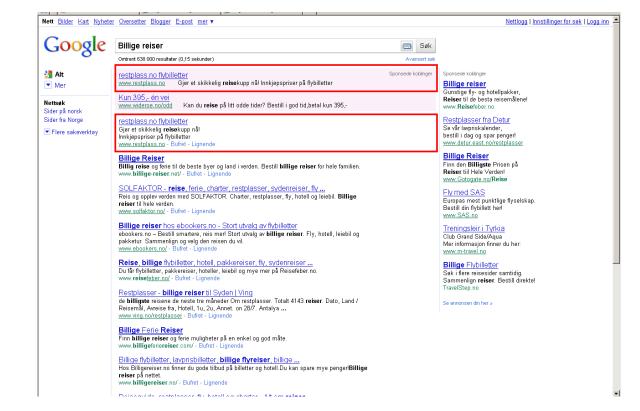
Example of a Side Sponsored Generic: Search Engine Result Page.

Task Example



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

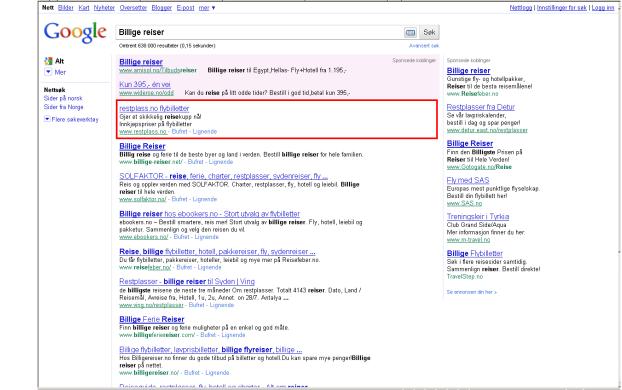
Task Example





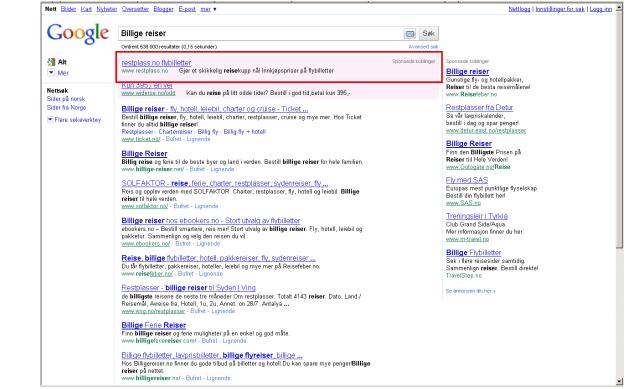
Example of a Top Organic Generic: Search Engine Result Page.

Task Example



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

Task Example



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