



Stockholm, August 6th

Agenda



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

Summary

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

Methodology



- Target group: Internet user in Sweden, aged 14 years and older
- Sample: n= 1,121 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 4,484 Search Tasks
- Period of analysis:
 - Fieldwork: from June 22th to June 29th 2010
 - Final Report: August 6th, 2010
- Research company: TNS Infratest

What we've done

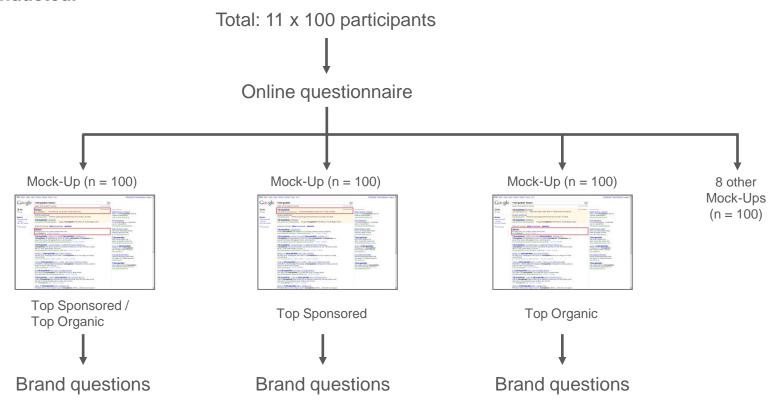
Flow of session – Description of approach

Study Design



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

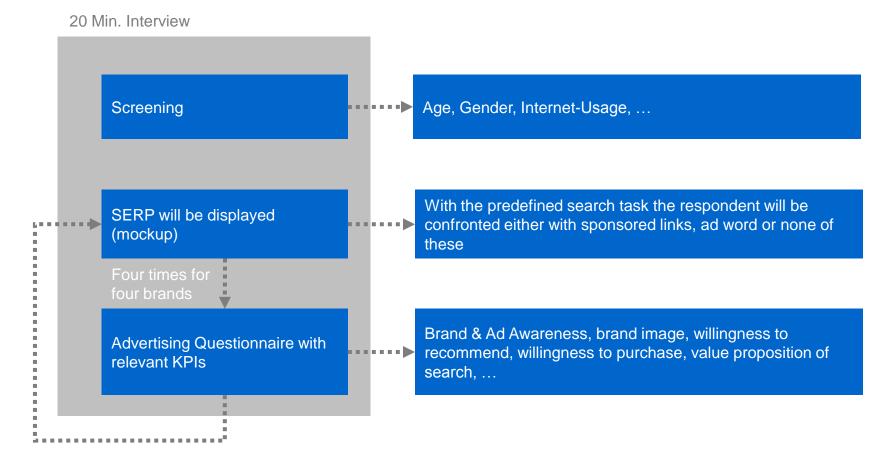
After having seen the stimulus for each brand a questionnaire covering these brand metrics was conducted.



General Flow

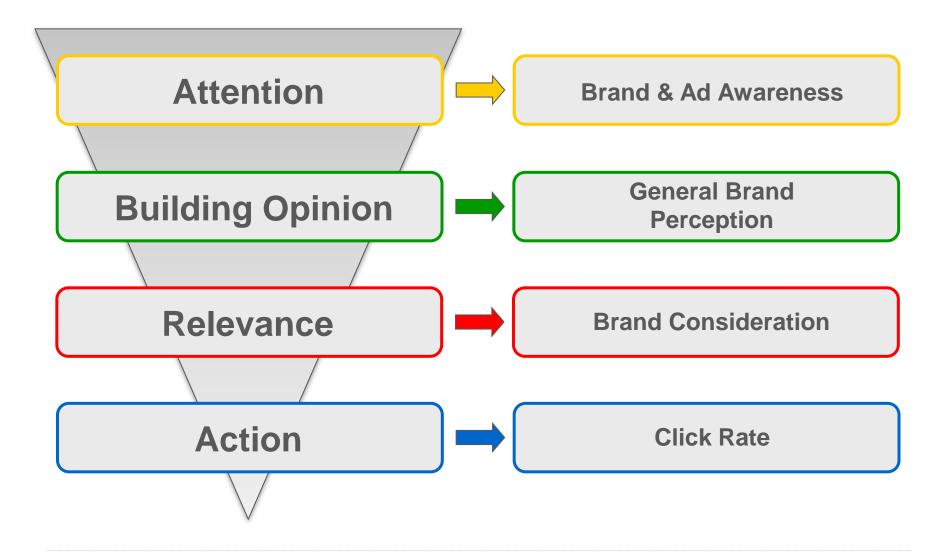


Each respondent will respond to screening questions, click on four mock-ups and provide answers to the relevant KPI's.



Brand Metrics – Analysis of four Brand Metrics

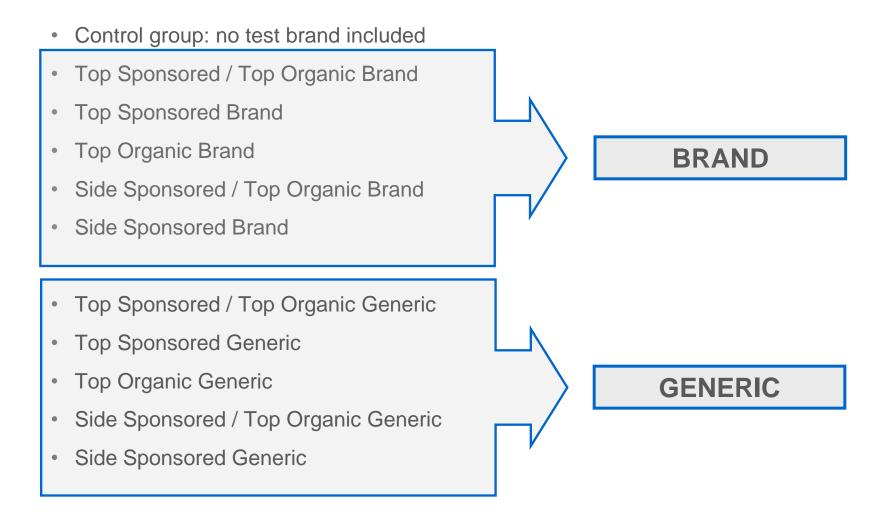




Stimulus Overview

Stimulus Overview





Part 1 Cumulated Overview

Selected Metrics on a cumulated Level

Action

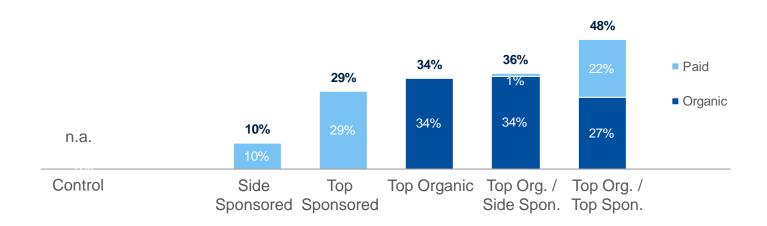
How do people react? Click Behaviour

Click behaviour - Position



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

Source: TNS Infratest

Base: All respondents n=1,121 – Tests Side Sponsored n=804; Tests Top Sponsored n=827; Tests Top Organic n=824; Tests Top Org. / Side Spon. n=809; Tests-Top Org. / Top Spon. n=810

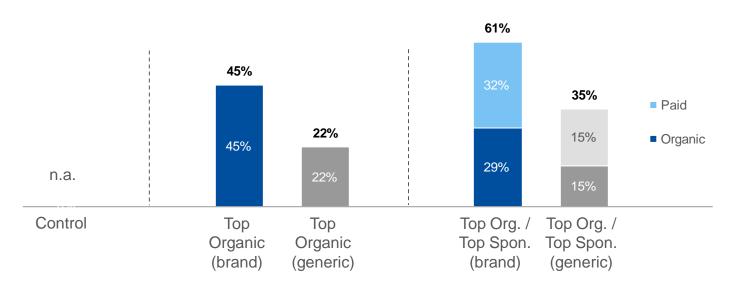
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Click behaviour - Position & Brand



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

Click Rate
Aggregated Result for 4 Brands



Click on the specific group

Base: All respondents n=1,121 – Tests Top Organic (generic) n=414; Tests Top Organic (brand) n=410; Tests Top Organic/Top Sponsored (brand) n=403; Tests Top Organic/Top Sponsored (generic) n=407

Attention

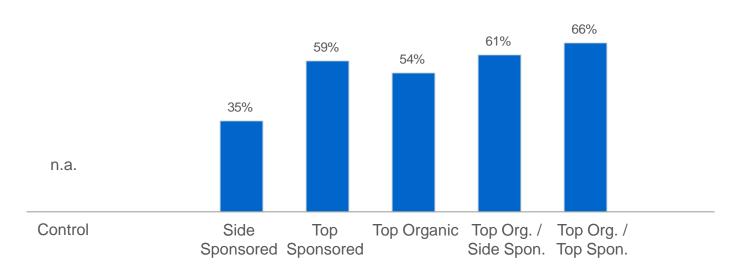
Brand and Ad Awareness

Aided Brand & Ad Awareness - Position



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

Brand & Ad Awareness:
Aggregated Result for 4 Brands



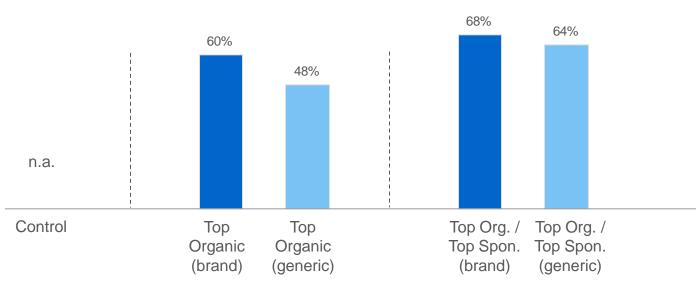
Q204: Which of the following brands of ... do you remember seeing on the search engine results page you just viewed? Base: All respondents n=1,121 – Tests Side Sponsored n=804; Tests Top Sponsored n=827; Tests Top Organic n=824; Tests Top Org. / Side Spon. n=809; Tests Top Org. / Top Spon. n=810

Aided Brand & Ad Awareness – Position & Brand



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=1,121 – Tests Top Organic (generic) n=414; Tests Top Organic (brand) n=410; Tests Top Organic / Top Sponsored (brand) n=403; Tests Top Organic / Top Sponsored (generic) n=407

Building Opinion

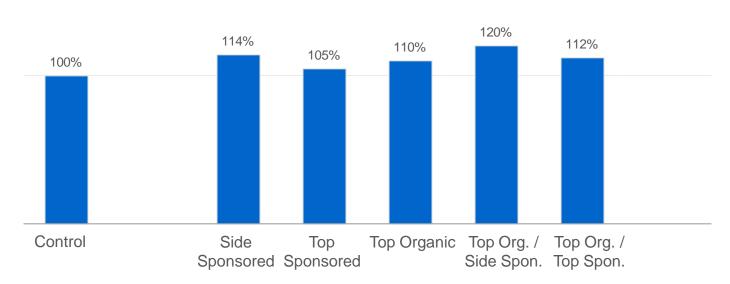
How does position and brand influence general brand perception?

Brand Perception - Position



Presence on Googles result pages has a positive effect on brand image.

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

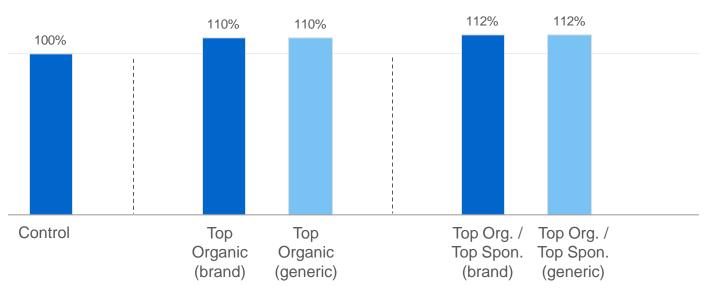
Base: All respondents n=1,121 - Base: All respondents n=1,121 - Tests Control n=410; Tests Side Sponsored n=804; Tests Top Sponsored n=827; Tests Top Organic n=824; Tests Top Org. / Side Spon. n=809; Tests-Top Org. / Top Spon. n=810Tests Side Sponsored n=804; Tests Top Sponsored n=827; Tests Top Organic n=824; Tests Top Org. / Side Spon. n=809; Tests-Top Org. / Top Spon. n=810

Brand Perception - Position & Brand



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=1,121 – Tests Control n=410; Tests Top Organic (generic) n=414; Tests Top Organic (brand) n=410; Tests Top Organic / Top Sponsored (generic) n=407

Tests Top Organic / Top Sponsored (generic) n=407

Relevance

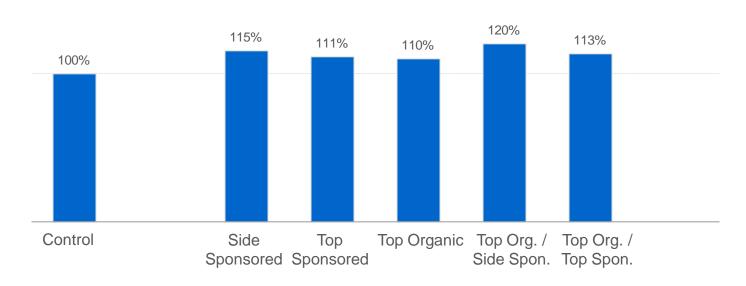
How does position and brand influence brand relevance?

Brand Relevance - Position



Presence in Googles search results has a positive effect on the brand relevance. Combined organic and paid presence is recommended.

Index Relevance:
Aggregated Result for 4 Brands



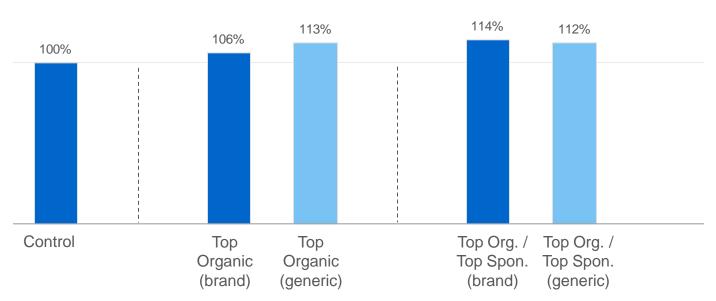
Q208: From the list below, indicate which of these brands you would consider if you were looking to purchase e.g. Träningskläder with 1 being highly likely to consider and 5 being highly unlikely to consider Base: All respondents n=1,121 – Tests Control n=410; Tests Side Sponsored n=804; Tests Top Sponsored n=827; Tests Top Organic n=824; Tests Top Org. / Side Spon. n=809; Tests-Top Org. / Top Spon. n=810

Brand Relevance – Position & Brand



Independent 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. Träningskläder with 1 being highly likely to consider and 6 being highly unlikely to consider. Base: All respondents n=1,121 – Tests Control n=410; Tests Top Organic (generic) n=414; Tests Top Organic (brand) n=401; Tests Top Organic / Top Sponsored (brand) n=403; Tests Top Organic / Top Sponsored (generic) n=407

General Information on Sample

Background information



Income *	Low	Medium	High	No answer
	22%	31%	36%	11%
Education **	Low	Medium	High	No answer.
	15%	44%	41%	0%
Household size	1	2	3	4 or more
	28%	37%	15%	20%
Children under 15y in HH	Yes	No		
	35%	65%		

*Low: Less than 20,833 kr./month; Middle: 20,834 kr./month to 37,499 kr./month; High: More than 37,499 kr./month

**Low: Elementary School; Middle: Secondary School; High: University

Base: Total n=1,121

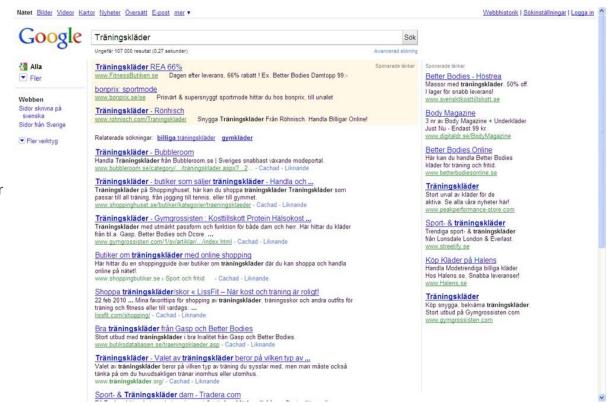
Appendix

Stimulus Example for Each Position



Example of a Control Group: Search Engine Result Page.

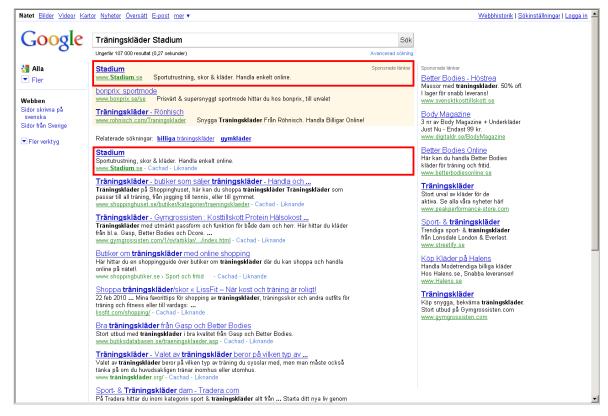
Task Example





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

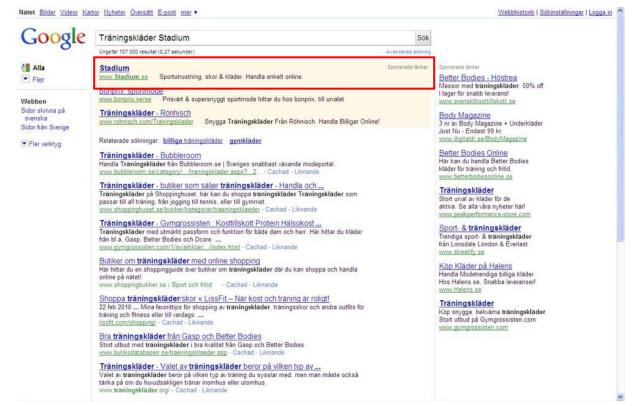
Task Example





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

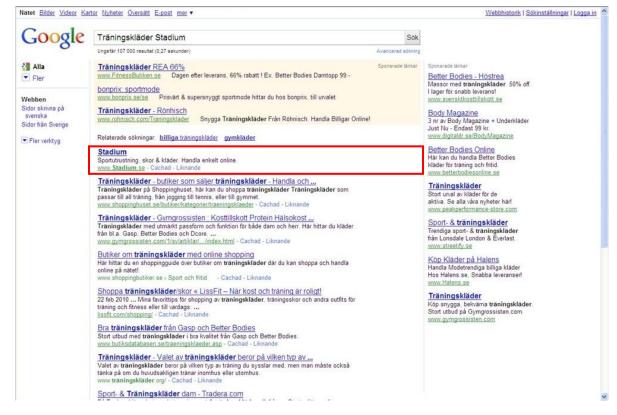
Task Example





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

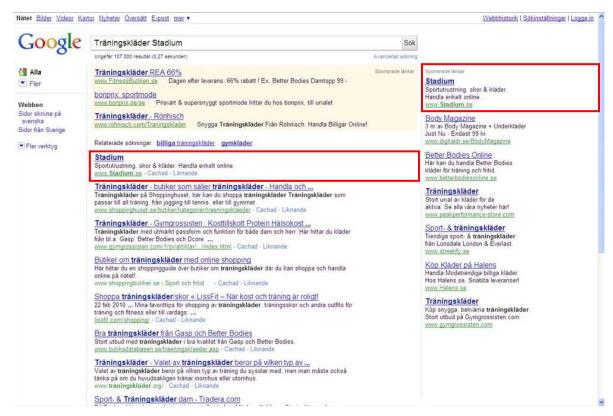
Task Example





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

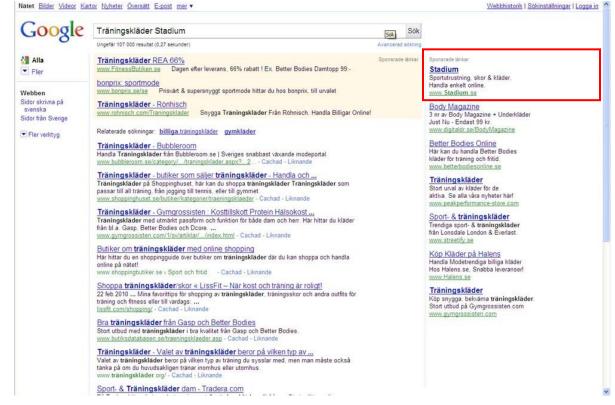
Task Example





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

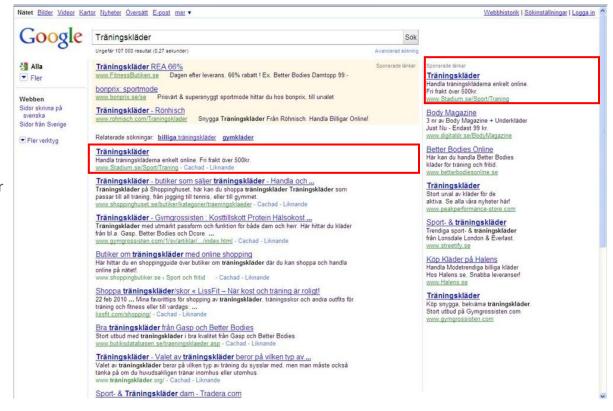
Task Example





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

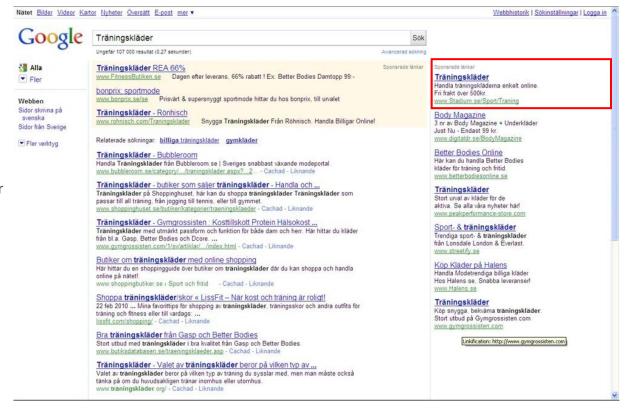
Task Example





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

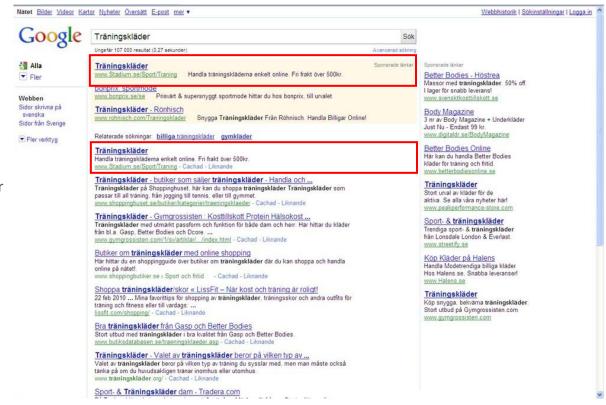
Task Example





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

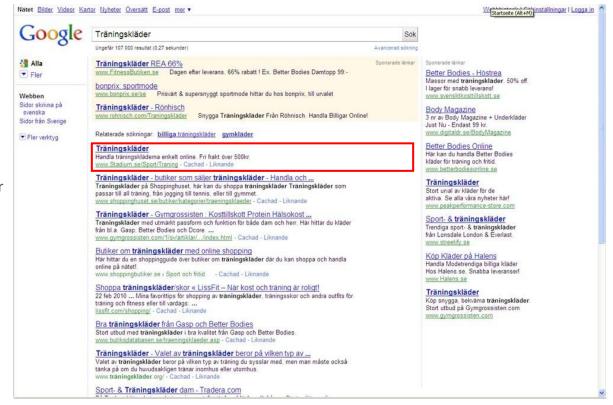
Task Example





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

Task Example





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

Task Example

