



Search Marketing

Benchmark Guide 2008

184 Charts & Tables+ 10 Heatmaps

Note: This is an authorized excerpt from the full 275-page Search Marketing Benchmark Guide. To download the entire Guide, go to: http://www.SherpaStore.com or call 877-895-1717

Editor's Note

Welcome to MarketingSherpa's Search Marketing Benchmark Guide 2008!

This fourth annual edition has been completely and comprehensively reresearched and rewritten. If you have an older edition, put it away and start working from this new edition – the search industry has changed over the past 12 months. Inside, you'll find a 360-degree comprehensive view of what works (and what doesn't) in search marketing today.

In addition to all the basic search marketing statistics you would expect, including costs per click, conversion rates, SEO versus PPC, we have several major *new* studies in this year's Guide:

#1. MarketingSherpa Search Marketing Benchmark Survey

2,475 marketers who conduct or supervise search marketing for their own companies answered our extensive survey in June and July 2007. Some even discussed their answers with us in follow-up calls. They revealed:

- What their real-life results, budgets and tests are, broken down by major search marketing goal
- Four-year trend data for many key points we've been tracking since we started this survey in 2003
- B-to-B versus marketing to consumers

In addition, 711 executives and staff members at search marketing agencies who conduct campaigns for clients took our survey. Discover how tactics, spending and results differ from experienced professionals who handle campaigns for dozens of ongoing clients at any one time. You'll find their insights to be of huge practical use.

#2. MarketingSherpa Special Report: Challenges to Bringing Search In-House

Are marketers happy with the results they're getting from their search agencies? If you're thinking about bringing your search engine marketing in-house, how hard is it? We have the answers from 247 marketers who did just that in the past 24 months.

In this Special Report, we asked marketers who stopped outsourcing what successes (or failures) they've seen since. The process was more involved than many thought, and they told us how long it took before they were truly up and running, as well as what problems popped up along the way.

We also looked at why it's so hard to find good search employees and how staffing ranks against other SEM concerns, why these jobs are so mobile and salary ranges in various parts of the country.

#3. MarketingSherpa Eyetracking Study: Search Ad Position & Relevance

Over the past three years, MarketingSherpa has conducted a number of eyetracking studies into different types of online marketing. Each provided insights into how consumers really look at Web-based content and advertising. This time, we focused on ad relevance, position and URL length.

How do a Web visitor's behavior and attention change when exposed to a relevant ad versus one that isn't on topic? Which matters more: relevance or position? One aspect of search listings that's often overlooked is the URL string attached to it. We wanted to determine whether the length of a URL affects viewing and attention.

For the first time, we recruited business professionals instead of consumers for this study. As such, it's one of the first eyetracking tests for business-to-business marketers, but the findings are just as relevant for consumer marketers, too.

Share our results, including colorful heatmaps, with your own design team. We hope you'll be inspired to improve your PPC bidding tactics, SEO priorities and copywriting so you get maximum results.

#4. MarketingSherpa Goes Under the Hood of Ranking Toolbars

In another MarketingSherpa Special Report, we delve into the ins and outs of search ranking toolbars. There are currently three toolbars that measure traffic and other factors to determine a Web site's popularity, standing or trustworthiness: Alexa by Amazon, Compete Toolbar by Compete Inc. and BrowserAccelerator by Emergency 24 Inc.

We reveal how their systems operate, how traffic is counted and how data may be affected, as well as their limitations and reliability. We also look at several toolbars that don't offer site rankings as a primary attractor.

Another new addition to this year's Guide is the first public look at a new way of benchmarketing click quality. The approach we feature uses a variety of click characteristics to assign a credit-like score to each individual click. In time, this model of click scoring and click fraud detection may lead to a pricing and payment model that better reflects reality and outwits the fraudsters.

As always, our goal with this latest Guide is to create the most comprehensive collection of *practical* numbers, stats and real-life factoids about search marketing for actual working marketers. All in all, this year's edition of the Search Marketing Benchmark Guide features 194 charts, tables and heatmaps. Use the information contained in the next 267 pages to:

- 1. Gain the power to set your PPC and SEO budgets for the coming year that make sense for your search marketing.
- 2. Forecast results including clicks, conversions and costs more accurately. (Also includes practical tips on measurement.)
- 3. Select which SEM tests you should conduct to improve results for your current campaigns and which ones may not be worth the time or effort.
- 4. Defend your search marketing plans to your CEO (or to clients if you're an agency.)
- 5. Train new staff more easily.

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. We wish you the best of luck with your next 12 months of campaigns.

Tad Clarke

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Editorial Director, MarketingSherpa Inc.

New Research Highlights:

2,475 Search Marketers and 711 Search Marketing Agency Executives Reveal Top 5 Insights for 2008

The search marketing industry is still expanding rapidly – as much as 31% in the United States and 39% globally for 2007. This year-over-year growth will slow in time. Still, search budgets are increasing by double-digit percentages for many marketers, although we're hearing feedback that many of those increases are in anticipation of rising prices, not a desire to extend their SEM reach.

The allure to bring SEM in-house is growing stronger for many marketers, although the number of organizations getting outside help actually increased over the past 12 months. However, it's becoming more common to use outsourced assistance as part, not all, of the overall SEM effort.

More emphasis on natural search has put pressure on many marketers to improve their own sites, while smaller companies are feeling the pinch in paid search/keyword price inflation. Click fraud is still a concern, but marketers don't seem as worried about it this year. That's probably more a function of media attention (or the lack thereof compared to last year) rather than any real change in the phenomenon itself.

We have selected four charts and a heatmap from this year's Guide demonstrating some of the data that will be of practical use for marketers seeking to improve their search results and budgeting.

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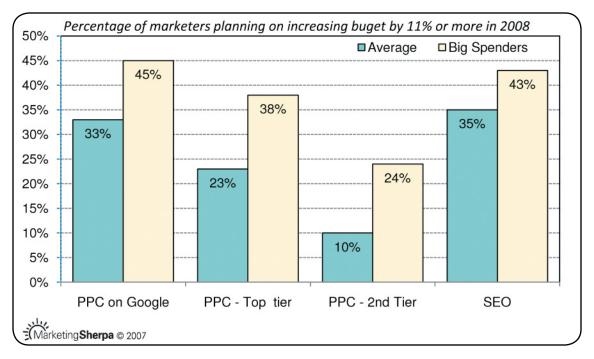


Chart #1: Expected Search Spending for 2008

Source: MarketingSherpa, Search Marketing Benchmark Survey, July 2007 Methodology: This fourth annual survey was opened to selected MarketingSherpa reader lists on June 27, 2007, and closed on July 12, 2007. 3,186 responses were collected from search marketers (2,475) and employees at search marketing agencies (711). Follow-up interviews were conducted by telephone with selected respondents.

In the chart above, we broke out Google from the rest of the top-tier search engines (Yahoo!, MSN, AOL and ASK) because of Google's domination in the industry. Together, these five companies control more than 90% of all searches. As you can see, a third of the average search spenders we surveyed expect to increase their pay-per-click marketing budget 11% or more with Google, while 45% of the big spenders (those who spend at least \$25,000 a month on search) plan to do so. With the other top-tier engines, nearly a quarter of the average spenders say they will increase their budgets more than 11% versus 38% of the big spenders.

Even second-tier sites should see double-digit increases next year. The second tier is any search site that doesn't have at least 10% reach. These include Business.com, MIVA, Kanoodle and the like. 10% of average spenders expect to increase their budgets 11% on these sites, while 24% of the big spenders will, too.

SEO budgeting will see a huge kick in the pants, too, with 35% of the average spenders and 43% of the big spenders increasing their budgets 11% or more.

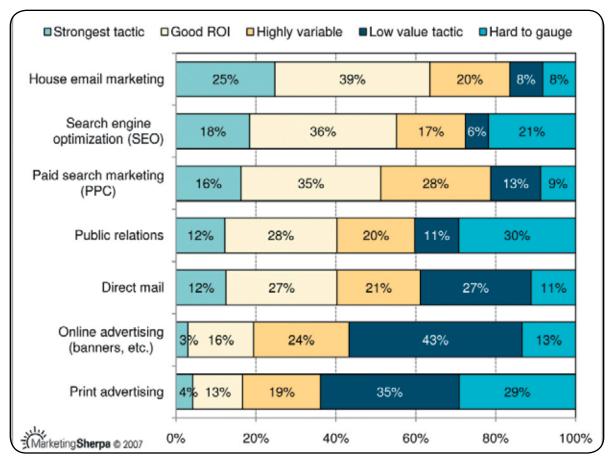


Chart #2: How Search ROI Stacks Up Against Other Tactics

Source: MarketingSherpa, Search Marketing Benchmark Survey, July 2007 Methodology: This fourth annual survey was opened to selected MarketingSherpa reader lists on June 27, 2007, and closed on July 12, 2007. 3,186 responses were collected from search marketers (2,475) and employees at search marketing agencies (711). Follow-up interviews were conducted by telephone with selected respondents.

House email still edges out search among common marketing tactics for the best ROI, but search engine optimization and paid search marketing both get strong marks by more than half of our survey respondents. Those tactics are more than 10 percentage points higher than the next two on the list, public relations and direct mail, and far more than online advertising and print advertising.

It's also interesting to note that SEO is one of the three tactics (along with PR and print advertising) receiving the largest number of responses for hard-to-gauge effectiveness. More than a fifth of our survey respondents are not sure how effective SEO really is. With the number of inexpensive and effective analytics tools readily available, we really don't think that needs to be the case.

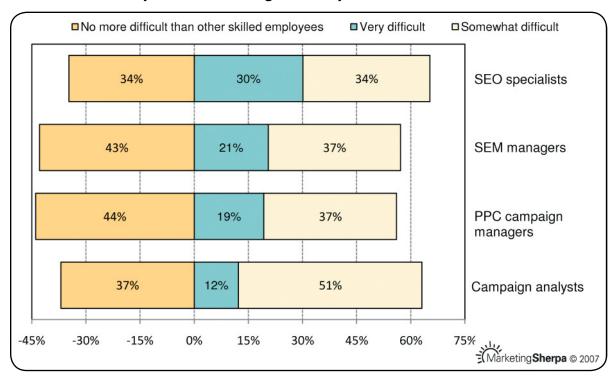


Chart #3: Difficulty in SEM Staffing Rated by Job Function

Source: MarketingSherpa, In-house SEM Survey, July 2007 Methodology: This survey was offered as an addendum to the regular Search Marketing Benchmark Survey, fielded on June 27, 2007, and closed on July 12, 2007. 247 respondents indicated that they had moved SEM in-house in the last 24 months and were given the add-on survey.

The debate to stop outsourcing your SEM and bring it in-house is a complex one, with pros and cons on both sides. Here, we feature one of several charts and tables from our Special Report on the challenges that marketers face.

More than a quarter of marketers we talked to were dissatisfied with their agencies' performances, while 40% expressed ambiguous feelings. Still, others said they were very happy with their agencies and saw this as a potential waste of time and money. For those who decide to make the move, they'll find filling SEM-related positions, especially SEO specialists, one of the biggest challenges: almost a third of our respondents say it is "very difficult" to attract these employees.

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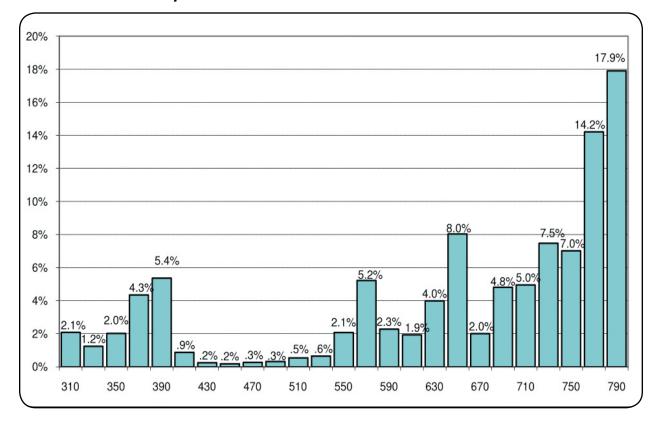


Chart #4: A New Way to Evaluate Clicks and Click Fraud

Source: Authenticlick for MarketingSherpa, August 2007

Clicks are an enigma. As the industry works to formally define a 'click,' a new lens through which to view click quality has emerged, and MarketingSherpa has the exclusive first look.

Above, we see a chart of global click scoring based on billions of clicks and a complex set of quality variables. Instead of a black-and-white, good-versus-bad methodology, the scoring system takes the next step by adding a layer of probability. In other words, a 3 a.m. click from South Korea is probably fraudulent, but there's no way of knowing it definitely except in rare circumstances.

In other industries, fraud models, such as this one are already in use. Credit card companies detect fraud using a similar system. For search engines, this new model of scoring and click fraud could mean a way of charging more for good clicks, while offering defined discounts for lower-quality traffic. For search marketers, it would offer protection against paying high prices for clicks that aren't likely to generate sales.

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Eyetracking Heatmap: Impact of Long URL Length on Ad Viewing

This year, we recruited business professionals instead of consumers for our latest eyetracking study, although the results are just as relevant for consumer marketers. One of the aspects we studied was length of URLs as they appear in search strings.

What we discovered was that long URLs actually work as a deterrent and stop viewers from doing what they're supposed to do (click!). Instead, viewers spend time trying to decipher what's in the URL itself. Those viewing the listing with the long URL actually ended up clicking on the listing immediately after it 2.5 times more than those viewing the listing with the short URL.

The page appears to add another break in it visually and push searchers to click on the listing under the one with a long URL. By keeping the URL shorter, the focus remains on the title of your listing where you are likely to have more success with those searching for your product or service.

In summary, we would like to thank 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 always, may your own results be even stronger for 2008

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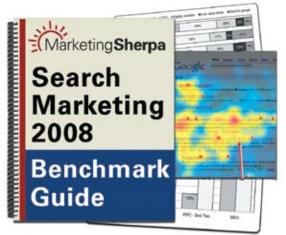
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