Succeed in Search

The Role of Search in Business to Business Buying Decisions
A Summary of Research Conducted
October 27, 2004

Conducted with the Assistance of

Conducted by
Gord Hotchkiss
Steve Jensen
Manoj Jasra
Doug Wilson

Enquiro Search Solutions
www.enquiro.com
info@enquiro.com
800 277 9997
250 861 5252

Introduction

Enquiro has worked to gain a better understanding of how consumers use search engines. Past research has centered in more general terms on consumer interactions with search engines, both through a survey and a focus group.

In June of 2004, Enquiro and MarketingSherpa agreed to create a survey to provide insight in how search might be used on business to business transactions. These are obviously distinct in a number of ways from typical consumer interactions. First, they generally happen at work. Secondly, they tend to have multiple people involved in the decision. Often one person is assigned with the task of gathering information and then reports back to a group that makes the final decision. Finally, there is a more rigorous budgeting process that accompanies a business to business purchase decision. For all these reasons, we suspected that search would play an important role. We were right.

As with almost all consumer decisions, search does play a critical role. The overwhelming majority of respondents (93.4%) indicated that they would use the Internet to research a business to business purchase decision. Most of these (63.9%) indicated that a search engine would be the first place they would turn. With the sheer numbers of business consumers turning to search, it's vital that marketers have a better understanding of how search is used.

This summary provides a number of high level observations from the survey data. A more extensive document looking at the findings in greater depth is currently being prepared and will be available to interested individuals. Anyone wanting this document can notify us at whitepapers@enquiro.com.

Methodology

An online survey of 40 questions was created jointly by Enquiro and MarketingSherpa and was tested with a pre sample of 60 users. The online survey can be viewed at http://jul04.enquiroresearch.com. The survey, in addition to typical questions, enabled participants to launch actual search queries on the most popular engines. The results were presented within the survey interface and we were able to record which result the participant found best matched what they were looking for. This allows Enquiro to look in much greater depth at typical interactions with search engines.

An invitation to participate in the survey was sent out by MarketingSherpa and Enquiro to lists of contacts within businesses throughout North America and the world. In total, almost 1500 people took the survey, giving the results a confidence level of 95 times out of a hundred, +/- 2.5%. Results were compiled and analyzed using standard SPSS tabulation and cross tabulation. These results were then reviewed and interpreted by a team at Enquiro, including Gord Hotchkiss, Doug Wilson, Manoj Jasra and Steve Jensen.

Importance of Search in B2B buying decisions

There can be no downplaying the importance of search in business to business consumer transactions. Because of the nature of these transactions, online research almost always plays a part. And search continues to be the number one method for finding relevant information online.

Respondents indicated that they spend an average of almost 4 hours a day online (see table 1.1) and the majority of that time is spent at work (see table 1.2).

Table 1.1 – Time Spent Online

Time spent Online		Percent
Time spent daily	< 1 hour	7.6
	1-2 hours	18.9
	2-3 hours	18.9
	3-4 hours	13.8
	4-5 hours	11.8
	5+ hours	28.9

Table 1.2 – Work vs Personal Internet Use

Work vs Personal Internet Use		Percent
% of time spent online	0% personal / 100% work	3.0
	25% personal / 75% work	52.4
	50% personal / 50% work	29.7
	75% personal / 25% work	13.7
	100% personal / 0%work	1.1

We asked participants to indicate an upcoming business to business purchase they might be considering. We then asked them to indicate the methods they would use to research this purchase. A full 93.2% indicated they would go online to research the purchase.

We then asked if they would use a search engine at some point to research their upcoming purchase. Only 4.46% of the people who would go online to research said they wouldn't use a search engine.

Respondents were asked the first place they would go online to learn more about the product or service they were considering. Search was the clear winner over manufacturer's sites and information portals, with 63.9 % of respondents. (see Table 1.3). When we looked at this broken out by budget allocated for the purchase, we found while search played a major role at all ranges, the importance of manufacturer's sites and information portals as the first site visited generally increased with budget (Table 1.4).

Table 1.3 – First Choice Online Destination

Where would be the first place you would go online to find out more about this product or service?		Percent
Places to begin research	search engine	63.9
	independent consumer review site	5.3
	e-commerce site that sells the product	3.1
	known manufacturer of the product	18.9
	portal for the industry	6.6
	other	2.2

Table 1.4 – Online Destinations broken down by budget

Budget Ranges	first place you'd go to research				
	search engine	Independent consumer review site	e-com site that sells the product	known manufacturer of the product	portal for the industry
<$500	72.1	5.2	1.9	14.9	3.9
$500-$1000	67.2	4.8	4.8	14.4	6.4
$1000-$2500	61.3	7.7	2.8	19.7	5.6
$2500-$5000	68.5	4.0	4.8	15.3	4.8
$5000-$10,000	59.6	5.5	1.8	24.8	5.5
$10,000-$50,000	53.5	7.0	4.9	25.4	8.5
$50,000+	60.0	1.8	0.9	20.0	13.6

That said, even respondents who chose these alternate destinations indicated that they would eventually come and use a search engine. 86.9% indicated they would visit a search engine after visiting 1 to 5 of these other sites.

Importance of Google

With the majority of respondents indicating that search plays a major role in their purchase decisions, we next asked which engine they would use to launch their search. We fully expected Google to be the winner, but we were surprised by how much they dominated their competition (Table 2.1). An amazing 82.9% chose Google as their engine of choice. This fact becomes a key strategic factor for marketers when we consider how Google users tend to interact with the Organic and Sponsored listings on the page.

We also found that Google tends to dominate to a greater extent as incomes and education levels increase. Google was the engine of choice with approximately 72.4% of lower income users, while it was the first choice of 86.9% of high income users.

With users with a high school diploma or equivalent, Google was the engine of choice for 67.8% of them. With users with a Masters degree, Google was the favorite of 86.6%. Men (86.7%) also tend to favor Google slightly over women (80%).

300 1851 Dickson Avenue, Kelowna, BC Canada V1Y 9X1 • P. 250 861 5252 • F. 250 861 5235 • WWW.ENQUIRO.COM • INFO@ENQUIRO.COM

Table 2.1 – Favorite Search Engine

Search Engine Chosen		Percent
Search Engine	All the Web	2.9
	Alta Vista	0.6
	AOL	0.3
	Ask Jeeves	0.6
	Google	82.9
	Lycos	0.6
	MSN	2.0
	Netscape	0.2
	Yahoo	7.5
	Others	2.4

When Search is used in Buying Cycle

With the importance of search in business to business consumer purchases, it becomes very important for the marketer to know how and when search will be used.

We asked respondents when they would start researching their contemplated purchase online. Obviously, the time is going to vary with the type of purchase, but the general responses (Table 3.1) indicated that there is usually a significant period of time between the beginning of research and the eventual purchase. A full 54.6% indicated it would be anywhere from 1 to 3 months.

Table 3.1 – Where in the Buying Cycle is Search Used?

How far in advance of your purchase would you use a search engine?		Percent
Valid	the same day	3.7
	a week or two	22.5
	a month	29.9
	2-3 months	24.7
	4-6 months	12.6
	7-9 months	2.3
	9-12 months	2.9
	Other	1.4

When broken down by budget (Table 3.2), the period of time predictably increases along with budget. For purchases of more than $10,000 over 60% of buyers would begin researching more than 2 months before the purchase date.

Table 3.2 – Place in Buying Cycle and Breakdown by Budget

		How far in advance of purchase date?							
		the same day	a week or two	a month	2-3 months	4-6 months	7-9 months	9-12 months	Other
Budget for Item	<$500	13.6	38.3	30.9	8.0	4.3	0.0	1.9	3.1
	$500-$1000	0.8	32.8	41.6	15.2	6.4	0.8	2.4	0.0
	$1000-$2500	2.1	25.0	37.5	27.8	4.9	2.1	0.0	0.7
	$2500-$5000	1.6	19.8	29.4	31.0	15.1	1.6	0.8	0.8
	$5000-$10,000	3.7	15.6	26.6	31.2	14.7	3.7	2.8	1.8
	$10,000-$50,000	0.0	11.0	24.7	36.3	20.5	2.7	4.1	0.7
	$50,000+	1.8	9.1	16.4	27.3	26.4	7.3	9.1	2.7

We also wanted to see if there was any correlation between education and the amount of research that goes into a purchase decision (Table 3.3). In general, we found the higher the education, the more likely it is that product research will happen further in advance of the purchase. We found similar variations in income levels, but did find that there was little in the way of variations between men and women.

Table 3.3 – Place in Buying Cycle and Education Level

		level of education				
		high school diploma or equivalent	college diploma	university degree	masters degree	doctoral degree
How far in advance of the purchase did you begin online research?	the same day	5.0	6.9	1.1	3.1	5.3
	a week or two	21.7	26.0	19.6	18.5	21.1
	a month	36.7	26.7	30.6	34.0	21.1
	2-3 months	20.0	21.4	27.3	23.5	36.8
	4-6 months	13.3	9.2	13.7	16.7	10.5
	7-9 months	1.7	1.5	4.1	1.9	5.3
	9-12 months	0.0	6.1	2.6	1.9	0.0

With this being the case, what are their intentions when they come to a search engine? Are they early in the research or consideration phase, or are they closer to a purchase decision? As shown in Table 3.4 , most respondents used search engines quite early in the buying cycle and were using them to do some early stage product education and competitive comparisons.

300 1851 Dickson Avenue, Kelowna, BC Canada V1Y 9X1 • p. 250 861 5252 • f. 250 861 5235 • www.enquiro.com • info@enquiro.com

Table 3.4 – Buying Phase while using Search Engine

In which of these buying phases were you when you used a search engine?		Percent
Where in Buying Cycle?	very early in research, little knowledge of product or service	46.2
	Later in research phase, some idea but wanted comparisons	30.2
	knew exactly, wanted reviews/articles	11.3
	knew exactly, wanted to find best place to buy	12.3

So, if they are usually researching when using a search engine, what will the nature of the conversion be? We asked respondents to recall a past experience where they had used a search engine to assist in researching a business to business purchase and what the outcome of that experience was. As can be seen in Table 3.5, over one third resulted in only purchases, with a little over a quarter culminating in offline purchases. Approximately the same number are still researching.

Table 3.5 – Results of Online Research

What was the Result of Your Online Research?		Percent
Valid	I never found what looking for	7.9
	Researched online, purchased offline	27.3
	Researched and purchased online	36.8
	still researching	28.0
	Total	100.0

Finally, when we looked at how far in advance of buying decision the research is done, compared to the type of site one would start their research at (Table 3.6), we found that while search engines were the number one pick in every instance, the importance of manufacturers' sites or information portals increased earlier in the buying cycle. This is consistent with the findings that indicated that these types of sites are more likely to be visited with bigger ticket items.

Table 3.6 – Place in Buying Cycle and Online Destination

		First place you'd go to research					
		search engine	independent consumer review site	e-com site that sells the product	known manufacturer of the product	portal for the industry	other
How far in advance of purchase date	the same day	69.7	3.0	0.0	18.2	6.1	3.0
	a week or two	72.9	2.4	1.9	17.9	2.9	1.9
	a month	61.9	7.2	3.6	19.4	5.4	2.5
	2-3 months	60.3	8.2	5.6	16.4	7.3	2.2
	4-6 months	64.1	0.9	0.9	21.4	12.0	0.9
	7-9 months	57.1	4.8	0.0	23.8	14.3	0.0
	9-12 months	66.7	7.4	0.0	18.5	7.4	0.0

Links chosen

Enquiro's SearchScope feature gave us the ability to allow participants to indicate the engine they'd like to search on and the query words they'd use. Then, they could assess actual search results and indicate which they'd choose.

In the survey, we gave the participants the opportunity to launch a search, and then if they didn't find anything of interest, to search again. We did this to find if there were any variations between the first and second attempts (Tables 4.1 & 4.2).

Tables 4.1 & 4.2 – Types of Links Chosen

Type of Link Chosen on First Try		Percent
	Traditional Organic Listings	69.6
	Alternate Organic Listings (Shopping, News, Local)	5.8
	Sponsored Listings	24.6

Type of Link Chosen on Second Try		Percent
	Traditional Organic Listings	74.5
	Alternate Organic Listings (Shopping, News, Local)	3.2
	Sponsored Listings	22.3

In looking at the Organic vs Sponsored breakdown by engine (Table 4.3), we found that Google users show the strongest preference for organic links, by a margin of 76.7% to 23.3%. Other engines such as Ask Jeeves and MSN had almost a 50/50 split between the two. This is consistent with previous research. As we have noted before, while engines that don't clearly delineate between sponsored and organic or try to push organic results below the fold seem to have higher click throughs on their sponsored listings, users have shown overwhelming that they prefer Google's approach, with clear delineation and prominent placement of organic listings.

Table 4.3 - Organic vs Paid by Engine

		Organic vs. Paid by Engine	
		Organic	Sponsored
Search Engine	All the Web	62.5	37.5
	Ask Jeeves	50	50
	Google	76.7	23.3
	MSN	54.5	45.5
	Yahoo	69.4	30.6

300 1851 Dickson Avenue, Kelowna, BC Canada V1Y 9X1 • P. 250 861 5252 • F. 250 861 5235 • WWW.ENQUIRO.COM • INFO@ENQUIRO.COM

The Importance of Position for Click Throughs

With a collection of hundreds of search results to analyze, we were also able to notice some significant patterns that point out the apparent importance of position on both the organic and sponsored listings in terms of click through percentages. While previous research indicated that people rank factors such as relevance and the appearance of trusted brand names or sources of information much higher than position in the links they chose, the fact is that the top 3 rankings on the organic side drew almost 60% of the total organic click throughs (Table 5.1).

The same is true on the sponsored side, where the top 3 links (appearing both on the top and right side locations) where the number one link drew over half of all the click throughs.

Table 5.1 – Effect of Listing Position on Click Throughs

		Effect of Position on Click Throughs (% of all click throughs shown)	
		Organic	Sponsored
Ranking	1	27.4	51.0
	2	19.5	24.2
	3	12.8	9.8
	4	9.5	4.6
	5	8.6	0.6
	6	6.7	5.2
	7	5.3	1.3
	8	2.6	3.3
	9	3.9	
	10	3.7	

Sponsored: Is Top or Side Better?

Given the importance of position in click through performance, the question arises, "Is the top or side position better for sponsored performance?" Is it worth paying the premium to secure the top of page position on engines such as Google that offer both?

In the survey, we addressed this question in two ways. First, we asked respondents which part of the page their eyes are generally drawn to. Then, we actually captured which listings caught their eye, and where those listings were positioned on the page. In both cases, top sponsored ads outperformed the ones on the right side of the page (Table 6.1).

In click through performance, top ads captured 45.6% of the click throughs, while the side ones captured 53.8% (bottom sponsored ads captured a negligible number of click throughs). While the side ads captured more in terms of sheer numbers, the advantage goes to the top sponsored ads when the following factors are considered:

- The top sponsored position doesn't show on every search
- The top position generally only shows 2 choices, while the side one shows 6, 7 or even more

When we asked participants which section of the search results page they tended to look at first, the advantage the top position has became even clearer. While the top section was looked at first by 14.2% of respondents, the side section only drew 3.7% of users.

Table 6.1 – Section of Search Results Page First Looked At

Which Section of the Page do you first look at?		Percent
Section	Top Sponsored	14.2
	Alternate Organic (Shopping, News and Local listings)	20.1
	Main Organic	62.0
	Side Sponsored	3.7

These results also point out the emerging importance of the alternate organic choices on the page, namely the shopping, news and local listing feeds. In Google, these appear directly above the main organic results, capturing prime placement on the page. These listings drew over 20% of respondents who regularly look at this section first.

Search User Patterns

Our previous focus group research had indicated that there are variations in the way people search. Four distinctive types of search behavior were identified. These were the deliberate researchers (carefully reading all listings before deciding), the fast scan and clickers (quickly scan the page and chose the first thing that catches their attention), the 2 Step Scanners (a quick scan, then if nothing jumps out as being highly relevant and interesting, a more deliberate scan) and the 1,2,3 Searcher (a more careful read of the listing, but apt to click through immediately upon finding a relevant link).

Unfortunately, because of the small sample size, we couldn't draw any conclusions about the demographics of the group. We hoped to use this survey to identify each of the groups more conclusively and start to gain some understanding about who makes up each group.

Another finding from the earlier research was that people have distinct patterns of how they scan a page of search results. They divide the page into sections and their eyes go from section to section in a natural order.

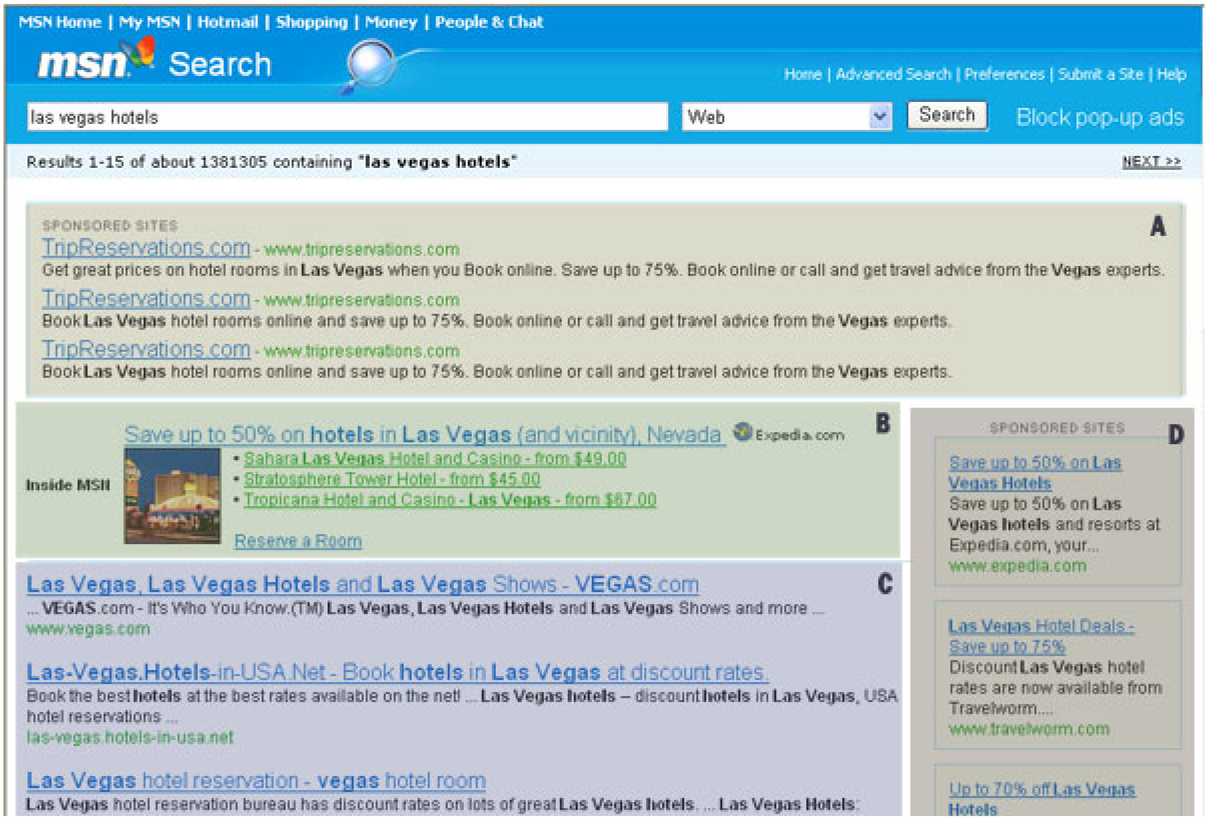
For the purpose of this survey, we divided the page into four distinct sections (Diagram 7.1).

These were:

A. Top sponsored Ads
B. Alternative Organic or Featured Sites
C. Main Organic listings
D. Side sponsored Ads

300 1851 Dickson Avenue, Kelowna, BC Canada V1Y 9X1 • P. 250 861 5252 • F. 250 861 5235 • www.enquiro.com • info@enquiro.com

Diagram 7.1 – Search Engine Page Sections



We asked respondents where their eyes tended to go first. Each respondent was presented with a screen shot as above, but with their favorite engine. As can be seen in Table 6.1 (in the previous section), the organic results definitely represent the prime real estate on the page.

These results varied by engine (Table 7.1), with Google representing the strongest demand for Organic content.

Table 7.1 – Favorite Engine and Area First Looked At

		What search engine would you choose				
		All the Web	Ask Jeeves	Google	MSN	Yahoo
Which area on this page would you typically look at first	Top Sponsored	38.89	0.00	9.16	37.50	53.06
	Alt or Featured	0.00	25.00	20.88	12.50	10.20
	Main Organic	61.11	50.00	65.75	50.00	34.69
	Side Sponsored	0.00	25.00	4.21	0.00	2.04

Almost as important as this first glance is determining where the eyes go next. In Table 7.2 , we show this second choice, cross tabulated with the areas that drew the initial attention.

Table 7.2 – Area First Looked at and Next Action Taken

		After looking at region indicated before, you would...				
		look at region A next	look at region B next	look at region C next	scroll down and look at the rest of C	look at region D next
Region of page you looked at first	A – Top Sponsored	10.59	36.36	21.68	2.97	8.54
	B – Alt or Features	21.18	6.36	62.24	5.20	15.85
	C - organic results	57.65	54.55	8.39	91.45	75.61
	D – Side Sponsored	10.59	2.73	7.69	0.37	0.00

The importance of these eye scan patterns became apparent when we cross tabulated them with the actual results chosen.

First, we cross tabulated these sections with the actual results chosen. As can be seen in Table 7.3 , users who first glance at the sponsored sections have a much greater likelihood of choosing a listing from these sections. This is particularly true of the side sponsored. The top sponsored is a natural stop for the eye, as it scans from the top to the bottom of the page. There is no reason to go to the side sponsored unless you're specifically looking for a sponsored listing.

Table 7.3 – Area First Looked At and Listing Chosen: Organic vs PPC

		Which area on this page would you typically look at first?			
		Top Sponsored	Alt Org. Listing & Features	Main Organic Results	Side Sponsored
SEO or PPC listing chosen	SEO	64.00	77.27	77.48	42.86
	PPC	36.00	22.73	22.52	57.14

But what about the second glance? Were a higher number of users captured on the second scan of the page? Again, users who would tend to scan the sponsored ads after looking at the organic listings have a higher likelihood of eventually choosing a sponsored link (Table 7.4).

Table 7.4 – Next Action and Listing Chosen: Organic vs PPC

		After looking at region indicated before, you would...				
		look at region A next	look at region B next	look at region C next	scroll down and look at the rest of C	look at region D next
SEO or PPC listing chosen	SEO	69.70	76.54	67.59	82.26	66.67
	PPC	30.30	23.46	32.41	17.74	33.33

300 1851 Dickson Avenue, Kelowna, BC Canada V1Y 9X1 • P. 250 861 5252 • F. 250 861 5235 • www.enquiro.com • info@enquiro.com

After, we correlated the sections users went to first with the position of the PPC listing they chose. As can be seen (Table 7.5), there is a significant connection between where the eye tends to go and where the listing is chosen.

Table 7.5 – Area First Looked At and PPC Position Chosen

		Which area on this page would you typically look at first?			
		Top Sponsored	Alt Org & Features	Main Organic	Side Sponsored
PPC position chosen	top	77.78	46.15	27.94	42.11
	side	18.52	50.00	69.12	54.89
	bottom	3.70	3.85	2.94	3.01

While these findings are hardly surprising, they do indicate the strategic advantages that can be had in maximizing your search placement by gaining a greater understanding of how your target market scans a typical search results page. This information will help ensure you're in the right place at the right time.

So, how do you target these different scan patterns? We looked at some basic demographic segmentation, including income, sex and education and found that while hard and fast rules don't apply, some general trends do appear.

It appears that the higher the income or education level (Table 7.6 & 7.7), the more likely it is that the user will first look at the organic results. This is true for both kinds of organic listings, the main section and the alternate shopping, news and local feeds. The one anomaly was with people possessing a doctorate degree, but perhaps the relatively small number of participants in this segment accounts for the variance. That said, we have noticed in two different studies that users with the highest level of education seem to buck the trends established by users with bachelor and master's degrees.

In addition, men are more likely to go straight to the organic section, where women seem to spread their attention more evenly around the page (Table 7.8).

Table 7.6 – Area First Looked At and Household Income

		Household income					
		$0-$14,999	$15,000-$29,999	$30,000-$44,999	$45,000-$59,999	$60,000-$74,999	$75,000 +
Which area on this page would you typically look at first	top portion, paid	26.32	20.69	6.25	9.09	13.89	12.84
	alt. org & features	21.05	20.69	18.75	25.97	29.17	18.35
	organic results	47.37	58.62	67.19	62.34	56.94	65.44
	sidebar, paid	5.26	0.00	7.81	2.60	0.00	3.36

Table 7.7 – Area First Looked at and Sex

		Sex	
		male	female
Which area on this page would you typically look at first	top portion, paid	11.67	16.46
	alt. org & features	17.38	25.51
	organic results	66.90	55.56
	sidebar, paid	4.05	2.47

Table 7.8 - Area First Looked At & Education Level

		Level of education					
		some high school	high school diploma or equivalent	college diploma	university degree	masters degree	doctoral degree
Which area on this page would you typically look at first	top portion, paid	66.67	28.13	13.74	10.11	11.04	20.00
	alt. org. & features	0.00	18.75	17.56	20.22	20.25	35.00
	organic results	33.33	53.13	64.12	64.62	66.87	45.00
	sidebar, paid	0.00	0.00	4.58	5.05	1.84	0.00

We asked participants about their feelings towards Organic and Sponsored listings. In general, the responses seem to match the actual link chosen information (Table 7.9), with 67 % of respondents stating a strong preference for organic listings.

Table 7.9 – Feelings Toward Organic vs. Sponsored Advertising

Feelings Toward Organic vs Sponsored Advertising		Percent
Valid	don't know what you're talking about	8.3
	no strong feelings	8.4
	I'll click on first relevant, regardless	21.9
	almost always organic but will look at sponsored	45.1
	never look at sponsored	14.2
	never look at organic	0.9
	none of the above	1.2

The second part of the identified search user behavior patterns focused on how results are actually scanned, regardless of where the eyes first went. We found that there were three distinct patterns (Table 7.10):

- A quick scan of the listings, looking for words that catch the eye
- A deliberate and careful scan of the listings

300 1851 Dickson Avenue, Kelowna, BC Canada V1Y 9X1 • P. 250 861 5252 • F. 250 861 5235 • WWW.ENQUIRO.COM • INFO@ENQUIRO.COM

- A 2 step scan, with a quick scan followed by a more deliberate one if nothing catches the eye in the first scan.

Table 7.10 – Scanning Search Results

User Behavior While Scanning Search Results		Percent
Valid	quickly scan, looking for words to jump out	27.0
	read titles and descriptions carefully	15.1
	scan for jump-outs, then read carefully	57.0
	none of the above	0.9
	Total	100.0

Finally, the third factor in behavior patterns is how quickly the searcher chooses a link (Table 7.11). There are two basic choices here; either click the minute something catches your attention, or read all the way through to the end and then choose your link.

Table 7.11 – Clicking on Links

User Behavior While Clicking on Links		Percent
Valid	click on first link of interest	72.0
	read all listings first, then decide	25.5
	none of the above	2.5
	Total	100.0

When you combine these two factors, you end up with 6 groups based on the search behavior pattern. In Table 7.12, we show the 6 groups and for sake of future reference, have labeled them as groups A through F (shown in brackets in the table). As can be seen from Table 7.12 , the majority of these (Groups A & C - 63%) tend to scan the page quickly and decide just as quickly. There are relatively few users (Groups B & E – 15.3%) who take the time to deliberately scan the page. These numbers probably account for the disproportionate number of click throughs on the first few listings in both the paid and organic listings. If decisions are made in a few seconds, it's reasonable to assume that listings that occupy the most visible positions on the page will be chosen more often.

Table 7.12 – User Behavior Matrix

		When looking at this region, you...		
		quickly scan, looking for words to jump out	read titles and descriptions carefully	scan for words to jump out, then read carefully
When searching, you...	click on first link of interest	21.3 (A)	8.6 (B)	41.7 (C)
	read all listings first, then decide	5.2 (D)	6.7 (E)	13.8 (F)

With these distinct groups identified, we want to do much more cross analysis to correlate identified search behavior with links actually chosen and the reasons for choosing them. In the final release of this study, we will work with the collected data to identify any demographic characteristics of each of these groups and further explore the actual results chosen. We also want to do further cross tabulation with eye scan patterns. It's hoped that by looking at each of these aspects of the search interaction, we will be able to provide insight into search marketing strategies to effectively identify these characteristics in your target market and intercept them effectively.

For the purpose of this summary, a quick look at the data did reveal some common patterns. Generally, higher income and education tends to lead to quicker click through decisions, putting these people in either groups A or C. There didn't seem to be significant variations along gender lines. And Group A was the one most likely to click on a sponsored listing. Generally, the faster a decision is made, the more likely it is that the click will occur on a sponsored listing.

Conclusion

This study revealed information that will be key to formulating effective search marketing strategies in business to business purchase scenarios

- *Search does play a key, even a dominant role, in these purchases.*
- *Search is most likely to be used during the early or mid research phase of the buying cycle.*
- *Search engines will likely be used in conjunction with other sites, primarily manufacturer's sites. Budget for the purchase is a factor in the likelihood of this occurring.*
- *Google is overwhelming the search engine of choice in these cases.*
- *Research (and search engine usage) generally happens at least a month or two in advance of the actual purchase decision.*
- *Budget plays a part in this as well, with the gap between research and purchase decisions increasing with the amount of the budget.*
- *Effective balancing of organic and sponsored strategies is essential. Organic draws anywhere from 70 to 80% of the click throughs. This varies by engine.*
- *Position, whether on the organic or sponsored side, is also essential. Over 60% of the click throughs happen on the first 3 listings.*
- *There seems to be a significant advantage to be in the top sponsored location if available.*
- *The way the users eye moves across the search engine page is a strong determinant in which listing will be eventually chosen.*
- *Over 60% of all users make their decisions about which listing they will click on in a few seconds, after a quick scan of the page. This reinforces the importance of position.*

Because of the nature of the survey, there is still much data to be analyzed. This depends on an extensive amount of manual categorization and coding. Following this brief overview of the data, Enquiro will be digging deeper and looking at the nature of the actual search interactions, gaining further insight into user behaviors and factors in choosing one link over another. We hope to publish the follow up in early December. To be notified, simply email us at whitepapers@enquiro.com or indicate you'd like follow up when you register at www.enquiro.com/research.asp.

Finally, a big thanks to Anne Holland and her team at MarketingSherpa. Their assistance was essential in the successful completion of the survey. It was agreed by both parties that the purpose of conducting the research was not to create a report that would be sold, but rather one that would be shared with any marketer hoping to find greater insight into how to use search effectively. We hope the results achieve our original goal.

300 1851 Dickson Avenue, Kelowna, BC Canada V1Y 9X1 • P. 250 861 5252 • F. 250 861 5235 • www.enquiro.com • info@enquiro.com