

The Influenced:

Social Media, Search and the Interplay of Consideration and Consumption

October, 2009

An exploration of a custom research study from comScore, GroupM Search & M80: The Influenced: Social Media, Search and the Interplay of Consideration and Consumption, October 2009.

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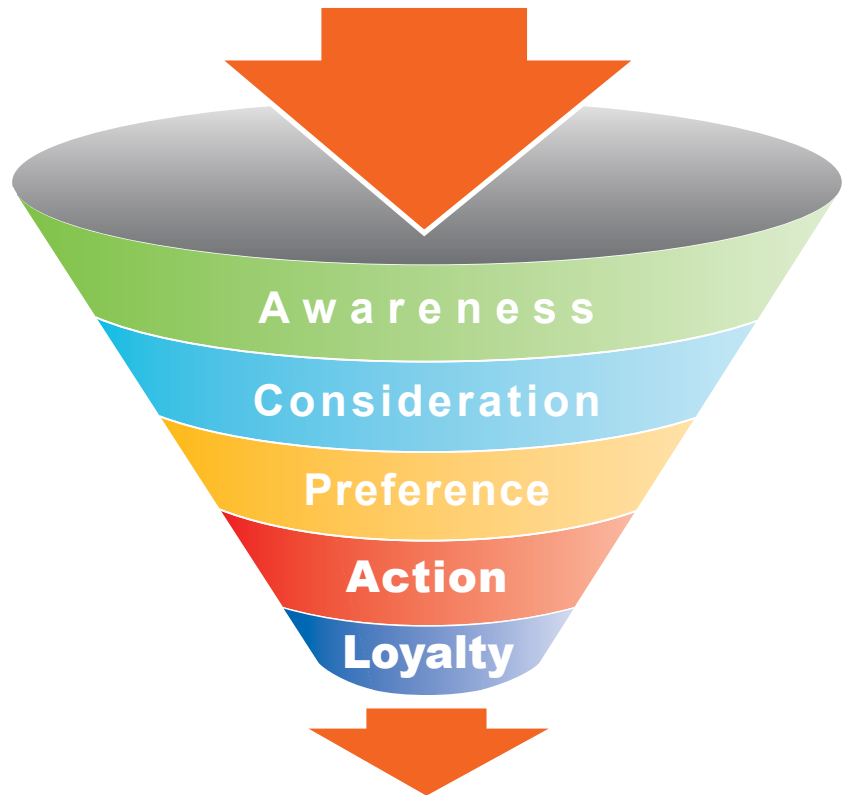
The Interplay Of Search And Social Media

Background and Opportunity: Synergy Between Social and Search

The reallocation of media budgets from offline media to online media has accelerated, as has consumer and brand use of social media. Search marketing, the fastest-growing, and most measurable channel in digital media, captures consumers' expression of intent. Similarly, social media is an open canvas of consumer expression in forums and platforms consumers relate to and in which they naturally spend time. As advertisers seek innovative ways to drive consumer engagement with greater efficiency, the integration of social media and search marketing offers a compelling opportunity for advertisers to actively participate in social media and make their brand a natural part of online conversation. Advertisers can then capture this audience efficiently with paid search, and drive a better return on investment (ROI).

The study sought to explore:

- When consumers are exposed to social media and influenced social media, are they more likely to search, and, when they do, more likely to engage?
- Does social media exposure influence search behavior by driving search queries further down the purchase funnel where consumers are more likely to convert?
- Is there a synergy between influenced social media and search marketing that drives better performance than search only?



The Research

The research explored the impact of social media on search behavior over a three-month period across different verticals, including automotive, consumer packaged goods and telecommunications.

Search behavior was broken into segments based on where queries fell among stages of the purchase funnel. This included upper-funnel terms expressing awareness and consideration (industry relevant terms, general product attributes) to lower-funnel terms expressing action and loyalty (campaign brand terms, brand product terms).

CONSUMER SEGMENTS

In addition to total internet users, consumers were divided into three segments:

Paid: Consumers exposed only to a brand's paid search

Social: Consumers exposed to social media relevant to a brand's category

- A blog, message board/forum, user review, social networking site, Twitter/micro-blogging, or video-sharing site. Also includes a brand's social marketing program's "target" sites, or sites which have the most natural potential to hold content about a brand.

Influenced Social: consumers exposed to influenced social media specific to a brand

- Identified sites containing distributed social marketing content of a brand's social media program

The Results: Social Media Influences Search Behavior & Performance

The study showed searchers who engage with social media, especially those exposed to a brand's influenced social media, are far more likely to search for lower-funnel terms compared to consumers who do not engage with social media. Further, consumers exposed to a brand's influenced social media and paid search programs are 2.8 times more likely to search for that brand's products compared to users who saw only paid search.

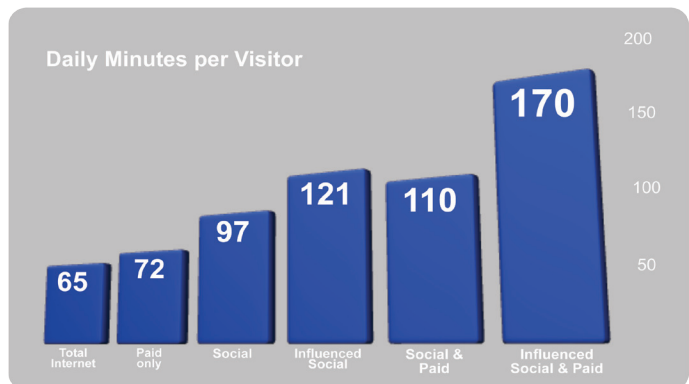
The study also showed a 50 percent click-through-rate (CTR) increase in paid search when consumers were exposed to influ-

enced social media and paid search. This revealed consumers exposed to social media are more likely to click on a brand's paid search ad as compared to those exposed to the brand's paid search alone. Among searchers using a brand's product name in the query, the CTR increased from 4.5 percent to 11.8 percent when users were exposed to both influenced social media and paid search around a brand.

The amount of time spent online varied dramatically among the consumer segments. Of consumers participating in social media, those exposed to a brand's influenced social media spent 20 percent more time online compared to those exposed only to social media relevant to a brand's category. Consumers exposed to both a brand's influenced social media and paid search spent almost 3 times more time online than the average consumer.

One of the key findings the study revealed is that social media exposure is correlated with lower-funnel search behavior.

Consumers exposed to social media – both relevant to a brand and influenced social – were far more likely to search for brand and product-related terms. Among lower-funnel searches for campaign brand terms, there was a 19-point lift in searcher penetration (the measurement of consumers who might use a search engine) by consumers exposed to relevant social media and

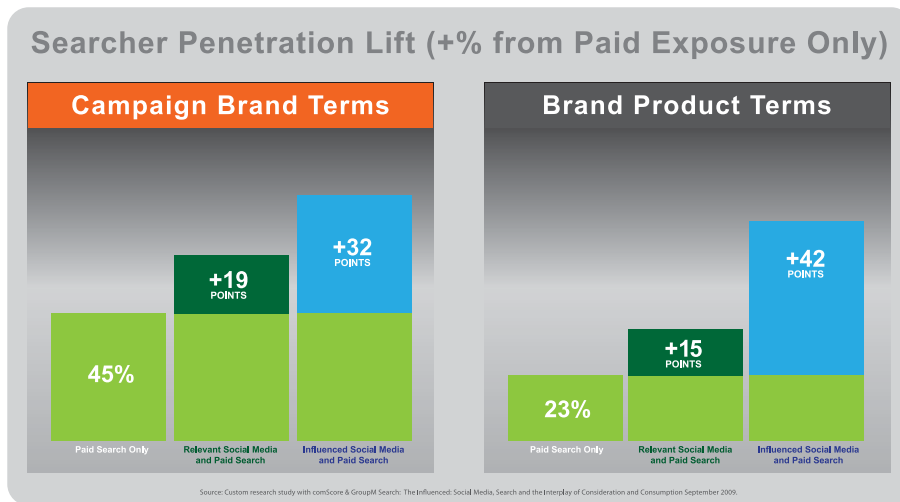


Source: Custom research study with comScore & GroupM Search: The Interplay of Search and Social Media, September 2009.

a brand's search ad as compared to those exposed to a brand's search ad alone. This then increased an additional 13 points when consumers were exposed to both influenced social media and paid search, for a total of 32-point lift in searcher penetration.

Among lower-funnel searches for brand product terms, there was a 15-point lift in searcher penetration by users exposed to relevant social media and the brand's search ad compared to those exposed to the brand's search ad alone. The consumer's propensity to search for brand product terms significantly spiked when exposed to both influenced social media and a brand's search ad, with a staggering 42-point increase in searcher penetration.

Searcher penetration up the funnel for general product attributes wasn't strong, showing only a 3 percent penetration for consumers exposed only to a brand's paid search. However, this increased dramatically when consumers were exposed to both influenced social media and a brand's paid search, rising 21 points.



Shedding some light onto the intentions expressed by these segments, the study showed searchers who use social media are more engaged consumers and more likely to be looking for places to buy and brands to consider. Consumers using social media are 1.7 times more likely to search with the intention of making a list of brands or products to consider purchasing compared to the average Internet user.

Additional Findings:

- Consumers exposed to influenced social and paid search exhibit 223 percent heavier search behavior than consumers exposed to paid alone
- Fifty percent of social media-exposed searchers search daily for product terms, compared to 33 percent of non-exposed searchers
- In organic search, consumers searching on brand product terms who have been exposed to a brand's social marketing campaign are 2.4 times more likely to click on organic links leading to the advertiser's site than the average user seeing a brand's paid search ad alone

Influenced Discovery

As consumers spend more time online and fragment their attention away from traditional media channels, the stakes have never been greater for marketers. Media delivery has an established place in the media mix. However, with new forms of media delivery, such as paid search, and the increased relevance of media discovery, the mix is clearly changing. Likewise, the value and investments being made between paid media and the creation and dissemination of owned and earned media are also evolving.

This research clearly shows a direct correlation between social media and paid search. As expected, social media exposes consumers to brands, their products, the benefits of their features, and corporate value propositions. It clearly presents a powerful and often underutilized way for brands to become part of the consideration set. This is an important learning because it helps situate social media in the marketing landscape – not as a conversion or direct response channel, but rather as an exposure and awareness vehicle. In doing this, it helps to better clarify the types of assets needed and the value exchange that should exist between brand and consumer.

In using these findings as a guide, we start to envision a better allocation of financial and brand investments for the improvement of paid media and overall performance.

It also becomes clear that while search remains the dominant direct response channel, it is sometimes forced to do a job best suited elsewhere. The “long tail” exists in search, and all campaigns can aspire to have deeper keyword lists. But simply throwing dollars at the tail, which often represents the upper-funnel, does not guarantee better ROI. As the study indicates, social media programs, which create an influence over consideration by consumers, prove to be a valuable tool in brand and product queries and CTR.

Media mix allocation inside these digital channels presents a new and unique opportunity for brand differentiation. Where search provides 95 characters of text for communication, the opportunity now exists to use social media to influence consideration, and capture growth through better-educated spending around product attributes and brand and product terms, where query share and CTR is increased.

Many marketers struggle with conflicted opinions about investing in owned assets against the ROI void which seems to exist. This data suggests the opportunity to approach media as a collective performance of earned and owned assets to drive greater engagement up the funnel and using paid to capture lower-funnel conversions.

As we move away from relying totally on paid media and better capitalize on our brands and their owned assets, the business of media discovery becomes a reality. In using this research as a guide, we can better allocate financial and brand investments to improve paid media and overall performance.

About GroupM Search

GroupM Search is the search marketing specialist division of GroupM, the media buying and planning arm of WPP responsible for more than 1/3 of the world's media buying. Honored by OMMA Magazine and MediaPost as the 2008 Search Marketing Agency of the Year, GroupM Search employs 600 search marketing strategists globally and has the largest global footprint of any other search organization with 40 offices serving more than 40 countries. GroupM Search provides industry-leading search marketing strategies technology development, research, staffing and training to GroupM communications planning agencies through its search divisions including Maxus Search, MediaCom Search, MEC Interaction and MindShare Search, as well as the direct-to-client brands, Outrider, Catalyst Online and Quisma. Our search divisions provide clients with the right balance of human intelligence and search technology in order to deliver award-winning paid, organic and advanced search marketing strategies (mobile, social media, video, local and more) that help our clients become a part of the online conversation. Global search marketing perspective from talent across GroupM Search can be found on the industry blog, SearchFuel (www.searchfuel.com). URL: www.groupmsearch.com



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