

Search & Social Media Survey 2011/2012

Insights into what marketers should
be looking for in 2012

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Foreword

Andreas Poulos, COO



Andreas Poulos takes a look at the results of Greenlight's Search & Social Media Survey and gives his insights into what marketers should be looking for in 2012.

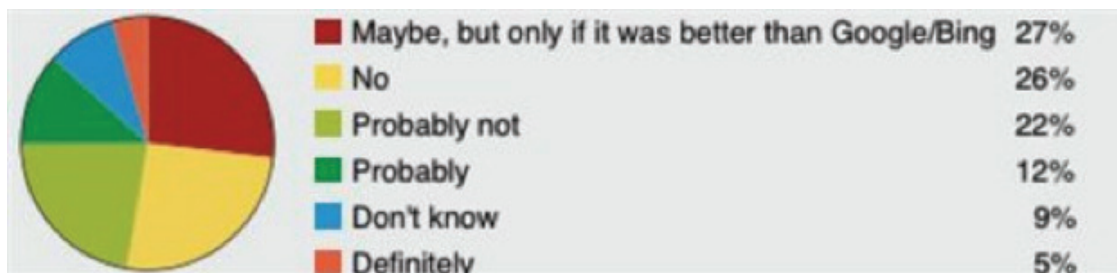
As an advertising professional, I'm squarely in the David Ogilvy camp, intent on ensuring that research is central to the advertising process. In his words: Advertising people who ignore research are as dangerous as generals who ignore decodes of enemy signals.

It's important to reflect on the attitudes and behaviours of the consumers we try to engage with, and research is a crucial method of doing so.

Our annual **Search & Social Media Survey 2011/2012**, is based on questions we posed to 500 people from all over the world – students, law enforcement professionals, medical staff, accountants, lawyers, the unemployed, and everyone in between. We wanted to hear directly from them about how they engage with online advertising, search engines, and social networks, in the hope that we could gain some insight into how people engage with us as marketers today, and also help us formulate some views on what the future might hold.

For instance, our research found that, of 500 respondents, **5% would 'definitely' use a future Facebook search engine if the firm were to launch one to rival Google's¹**. The other extreme, those categorically saying that they simply would not use a future Facebook search engine, totalled 26% of all respondents. Those responding in the 'definitely' and 'probably' camps totalled 17%. Those responding 'no' and 'probably not', totalled 48%.

If Facebook incorporated its own search engine, would you use it over your preferred search engine?



Source: Greenlight

These stats therefore suggest that **Facebook could capture around 22% of the global search market by simply launching its own search engine tomorrow morning** (the 'definitely', 'probably', and half of the 'don't know' respondents combined). It wouldn't need to be a spectacular engine either, just well integrated into the Facebook experience and generally competent. This 22% market share would make Facebook the second most utilised search engine in every major market except for China, Japan, and Russia, where it would occupy an uncontested third place.

On the flip side, we found that **Google's own social endeavours with Google+ might be more successful than most initially speculated**. We found, for instance, that 23% of Google users have been +1'ing listings in Google's search results, giving Google lots of data about what people like. If you compare this to the 35% of users that we found routinely 'like' a brand or company on Facebook, then that's not significantly more than Google's social signal collection, particularly as we found that 28% of respondents had no idea

what '+1' actually meant, which will invariably decrease rapidly over time. So, you need to be encouraging +1's in Google, as it isn't something that might be important in the future – it already is! It affects your natural search rankings and will have an increasing impact over time across every Google product you utilise – AdWords, Price Comparison, Shopping, YouTube, etc., and Facebook could be a major search engine overnight, and so your brand's performance on Facebook today (likes, visits, etc.) will likely have a decisive impact on how well exposed you are on that new search engine.

Essentially, Google and Facebook will both be front and centre in 'social search' and so it won't be enough for your sites to simply be relevant, you'll also need to demonstrate qualities that attract social validation and promotion. To quote Ogilvy once more, "You now have to decide what 'image' you want for your brand. Image means personality. Products, like people, have personalities, and they can make or break them in the market place." Ogilvy would have achieved great results in this brave new world of social search. This is just one insight that can be drawn from our research.

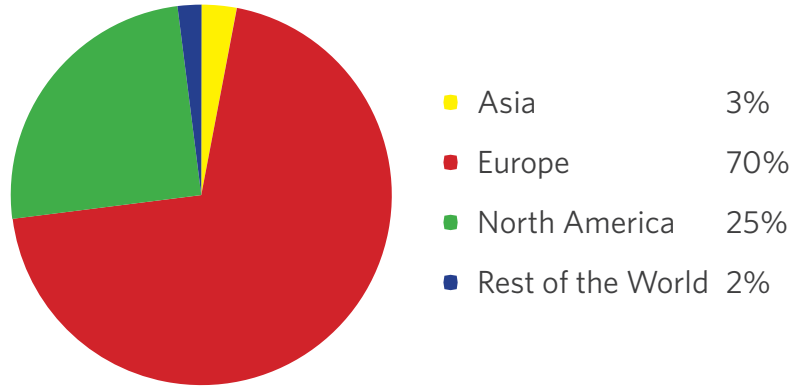
In the pages that follow we focus on some more of our most interesting insights, providing the data and some commentary and recommendations on what your response should be as marketers. We hope you find our findings as useful as we have.

¹Facebook already integrates Bing into its search function, but it is a buried option in the navigational side-bar post query, so this really does not constitute its own search engine by any real definition.

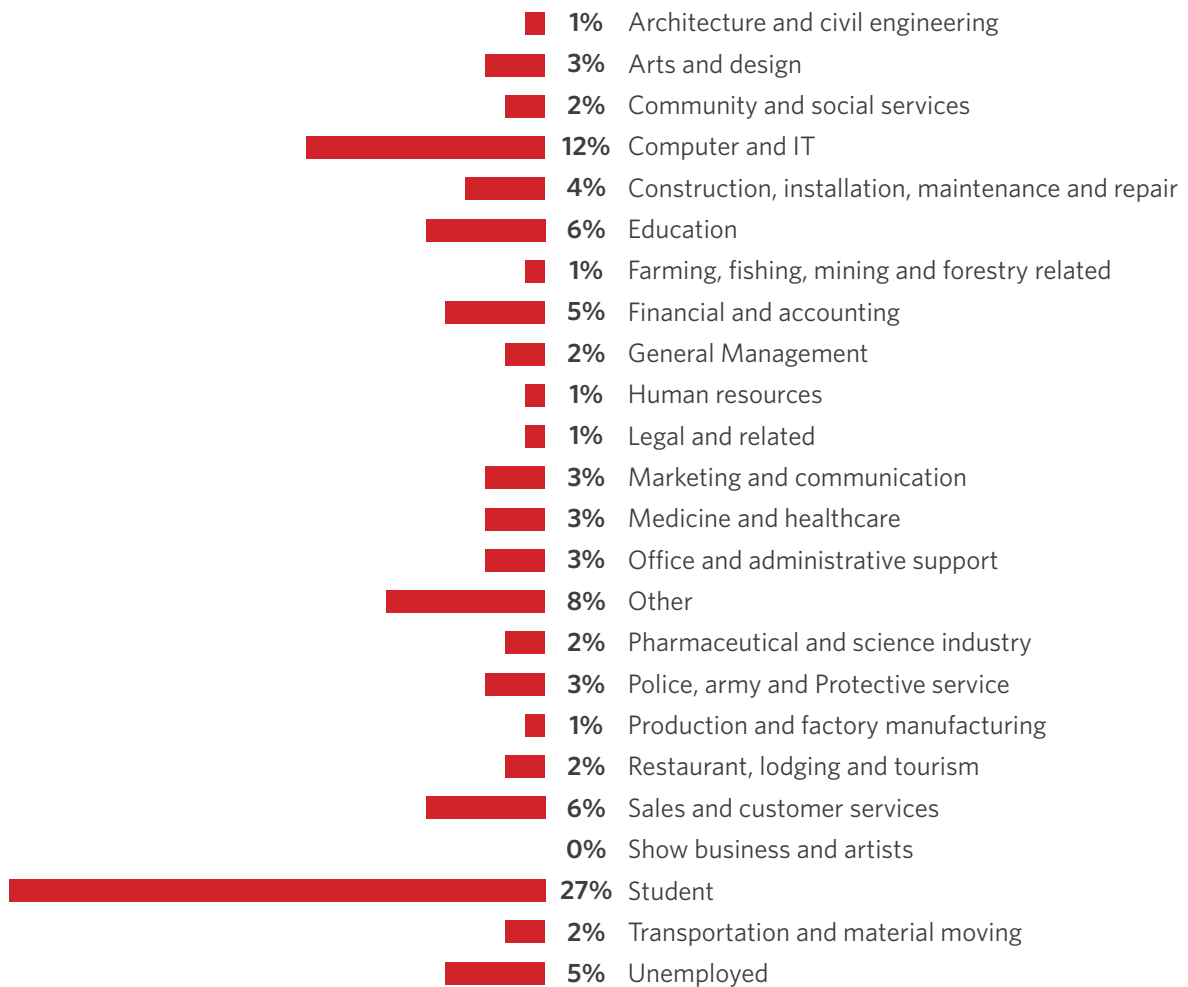
About the Survey - demographics

Total number of people surveyed: **500**

Regional breakdown



Breakdown by Job Title

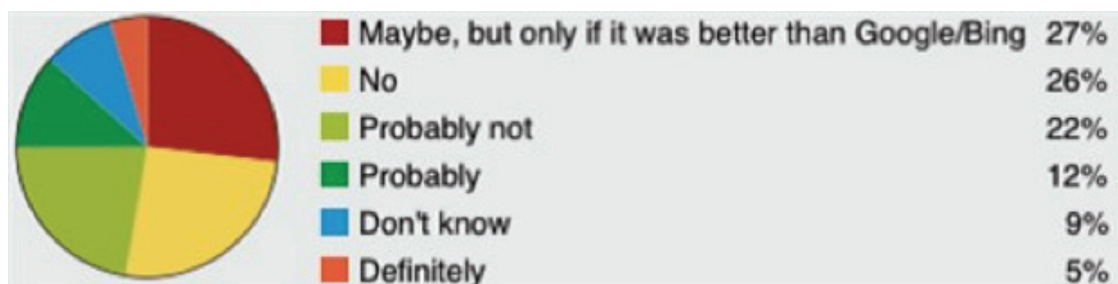


Should we bother with Facebook advertising if 44% of us would never click on a sponsored ad?

Hannah Kimuyu, *Director of Paid Media*

Following on from Andreas Poulos' foreword, I take one of his closing points: "The good news for Facebook is that it could capture around 22% of the search market by barely breaking a sweat". Although tiny when compared to Google's 87% share, the opportunity still presents a greater share when compared to the other big players in the market (Yahoo, Bing etc).

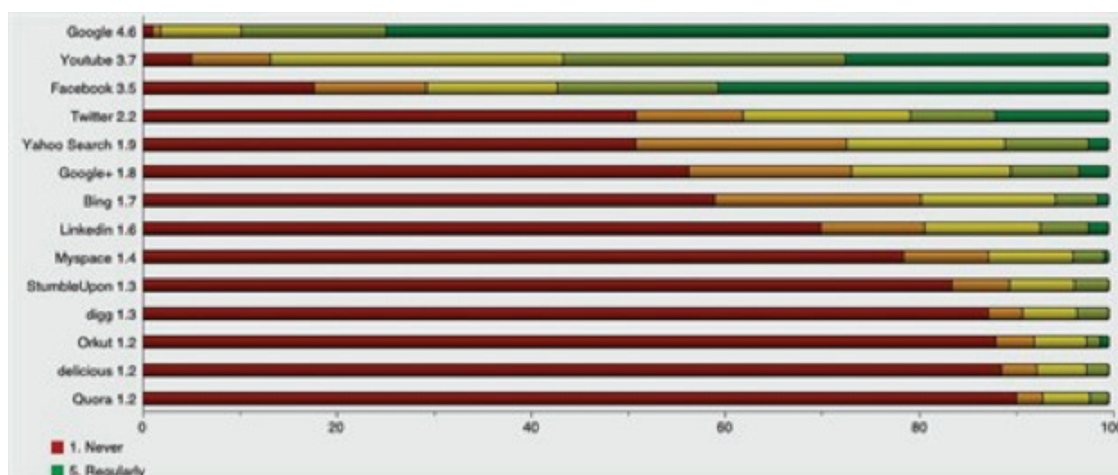
If Facebook incorporated its own search engine, would you use it over your preferred search engine?



Source: Greenlight

From our survey we discovered (as expected), the majority of us (at least 50%) use Facebook for social engagement, sharing photos, and catching up with friends and family. Facebook ranked as the third most popular website (after Google and YouTube) when we asked 'How regularly do you use the following websites/services?' It ranked second when we asked 'Which of the following do you use on your mobile phone?', with roughly 30% of using Facebook on mobiles and tablets.

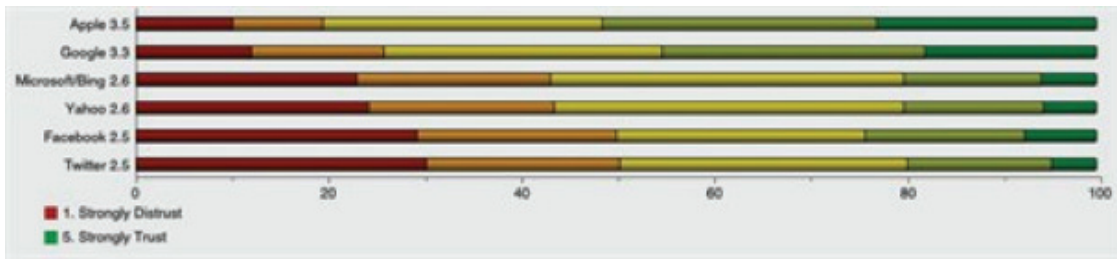
How regularly do you use the following websites/services?



Source: Greenlight

So Facebook's popularity doesn't come as a surprise. However, with over 30% of respondents saying they 'strongly distrust' Facebook with their personal data, Facebook's advertising programme has an upward struggle. For you that don't know, Facebook's advertising programme allows you to connect with more than 800 million potential customers, through targeting their age, gender, location and interests (in other words - personal data).

How much do you trust the following companies/brands with your personal data?



Source: Greenlight

When we asked ‘Do you click on advertisements or sponsored listings in Facebook’ only 3% responded with regularly and 10% often. The alarming response was the 44% that answered never.

Do you click on advertisements or sponsored listings in Facebook?



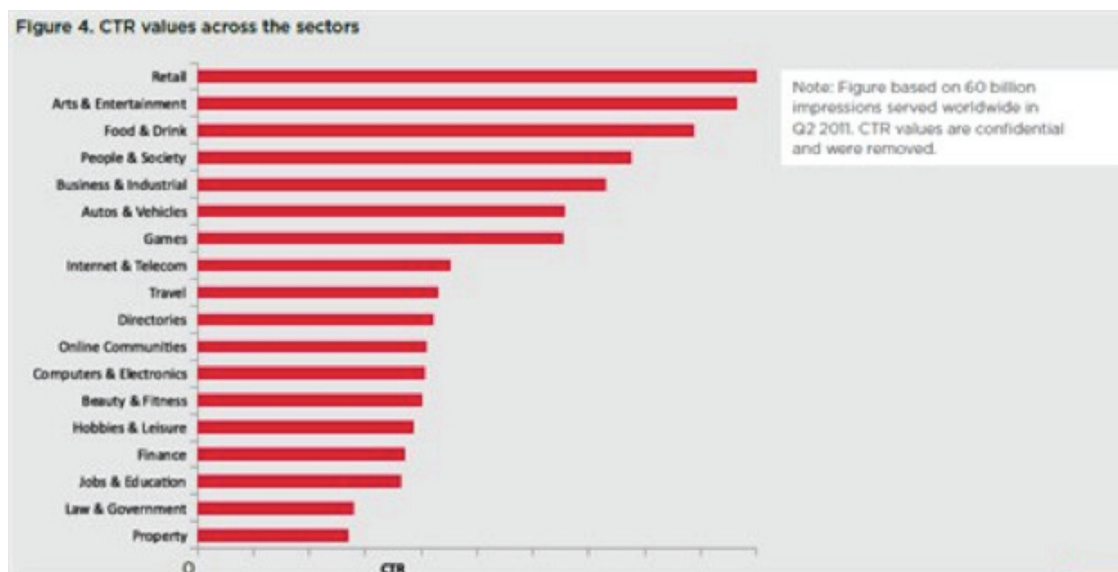
Source: Greenlight

Yet, does this reflect an advertiser’s point of view? For Greenlight and many other agencies and brands, advertising on Facebook has become part of the ‘usual mix’. For Greenlight specifically, we saw our Facebook investment (client media spend) overtake both Yahoo and Bing collectively at the start of 2011, hinting the channel had constant growth and was delivering a strong enough return to invest more.

So what does the average performance look like in Facebook?

A Global Facebook Advertising Report compiled by TBG Digital in Q2 2011, examined 200 billion impressions across hundreds of advertisers in 21 markets. The study revealed that retail delivered the highest click through rate (CTR) when compared to other sectors. Furthermore, retail saw the largest increase in growth, going from being non-existent in Q3 2010 to showing steady growth by Q2 of 2011 (a 36% increase).

CTR values across sectors



Source: TBG Digital

Pulling this study back to Greenlight's client base, we have seen similar performance levels, especially with retail getting more from Facebook. On average a CTR of 0.5% - 0.8% is considered positive, retail brands typically achieve 0.8% - 1.0%.

Similarly to Google's Display Network (GDN), Facebook has spent the last 12 months developing its advertising programme, slowly moving from offering just branded advertising (Fan Acquisitions) to becoming a serious direct acquisition channel. Many of the developments are appealing to retail brands, especially with retail being the most active in the space. Most recently we have seen one high street retailer achieve a 15% higher average basket value and a 20% increase in conversion rates on Facebook, when compared to its Search activity.

But when is Facebook most effective?

We should all be familiar with the typical ad format as below (Fig 1.0). However, the most popular and effective ad format is the Sponsored Story (Fig. 2.0). Also highlighted by TBG in its 'Global Facebook Advertising Report', the Sponsored Story format delivers, on average, a 32% decrease in cost per acquisitions (sales) and an increase in CTR (engagement).

Fig 1.0

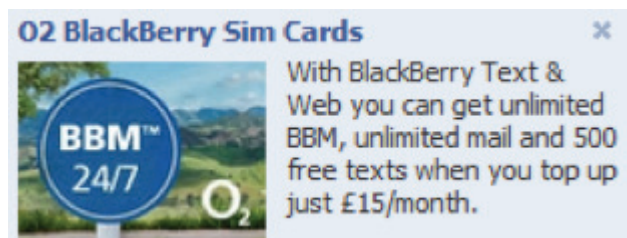
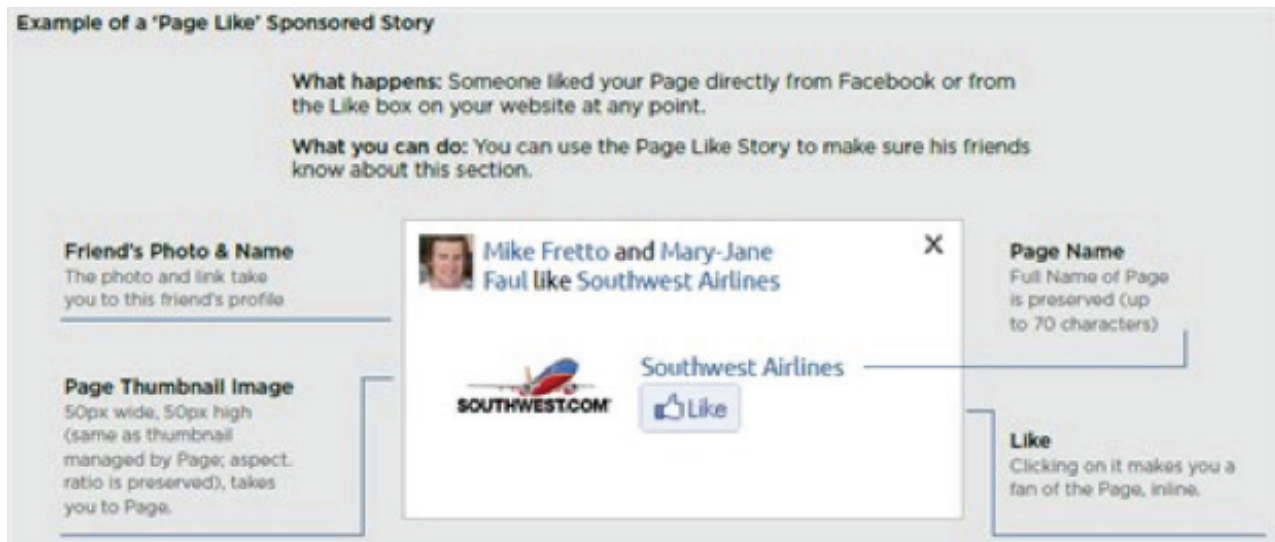


Fig 2.0



When running both the traditional ad format alongside a sponsored story format, we tend to see at least a 30% increase in conversion rates, again with retail leading across the sectors.

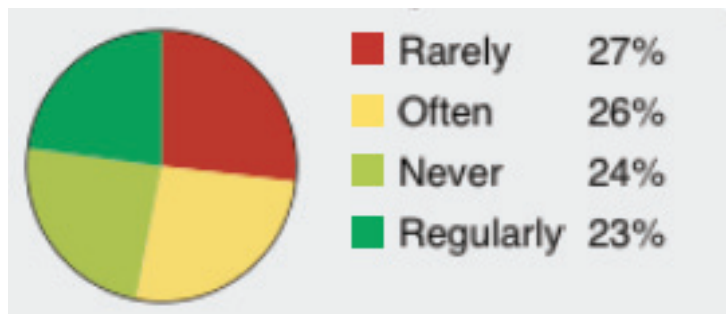
So in conclusion, although 44% said they would 'never' click on advertisements or sponsored listings in Facebook, it is interesting to see that those who do find the targeting effective and engaging. Moreover, given the positive growth figures, we at Greenlight predict that more of us will be advertising and hopefully 'clicking' on an advertisement or a sponsored listing on Facebook in 2012.

Do you ever conduct searches in another language? 76% of people search in two or more

Adam Bunn, *Director of SEO*

Without thinking about this for too long, my instinct would be to assume that not many people search in more than one language. The results, however, suggest quite the opposite. Clearly, people's definition of 'rarely', 'often' and 'regularly' are going to vary, but in the final analysis this suggests that 76% of people search in two or more languages - a significant proportion that warrants some further investigation. To make some sense of this, I've dug a bit further into the data to find out where all these multi-lingual speakers are.

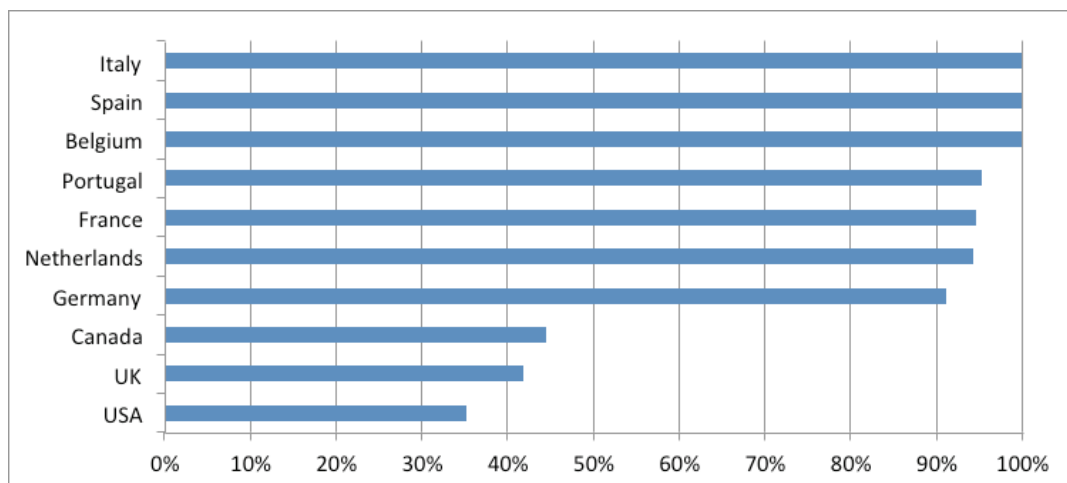
Respondents who search in multiple languages



Source: Greenlight

Some of the countries that are topping this chart aren't entirely surprising - Belgium, for example, has three official languages. Others aren't so obvious. The fact that Italy and Spain top the chart with 100% of respondents claiming to search in multiple languages, despite reasonably homogenised language use, is possibly a testament to the position of English as the quasi-official language of Europe and the relative prevalence of English language web pages. I'm recollecting an infographic that Greenlight produced some time ago showing that the UK produced the most web pages per head in Europe at 17 pages per person, compared to ten per person in Spain and just six per person in Italy. Presumably as well as there being more English spam on the web, this also means there is more high quality English content to be searched for by Europeans as well.

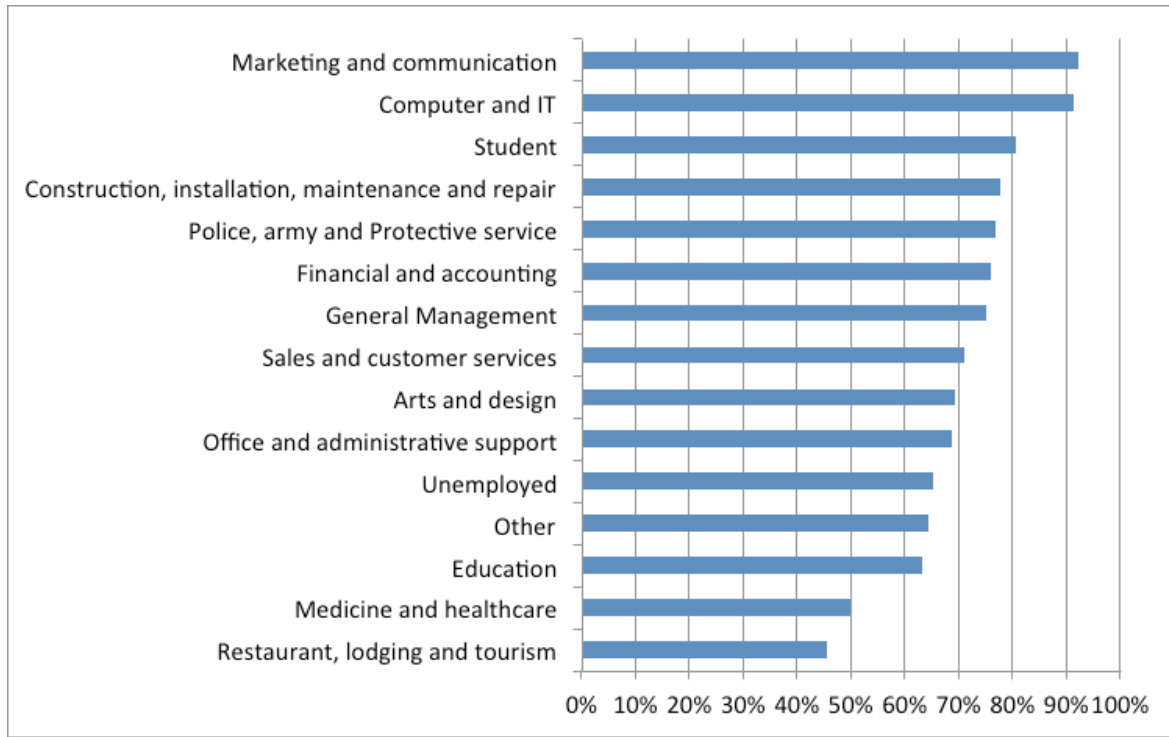
Respondents who search in multiple languages by country



Source: Greenlight

We can break the data down another way too, but this time by occupation. Here you can see that the occupations one might most readily associate with the Internet - IT and Marketing - top the list of occupations whose practitioners are most likely to search in more than one language.

Occupation of respondents who search in multiple languages



Source: Greenlight

So what if English is used to search in Spain? Won't my .co.uk domain handle that eventually? Not, as it turns out, as well as a subsection of a Spanish domain written in English would. Search engines will use the domain extension to help them determine the geographical relevance of a site, so while a .co.uk domain stands an increased chance of ranking in the UK, it will count against it when people are searching in another country. Consequently, this behaviour may warrant the creation of multiple language sites for your business. This of course runs counter to traditional search engine optimisation (SEO) logic which states that duplicate content is bad - which it is - so this would have to be undertaken with some caution, ensuring that all content is properly localised so that search engines know that one version is intended for region A, the other for region B.

The real takeaway here of course is not that marketing and IT firms in Italy, Spain and Belgium should instantly start optimising their sites for multiple languages, or that hotel sites in America should give up on the prospect. Our data is robust enough to start gleaning insights into Internet use, but not enough to build a SEO strategy around. Instead, as Andreas pointed out in his foreword, it's that proper research, beyond just gathering a few keywords from the Google AdWords Keyword Tool, really does help to inform your SEO strategy. The first step to deciding whether to progress an opportunity is to define the size of that opportunity. Hopefully this data gives you some food for thought about how to define that opportunity.

Search & Mobile on the go - Google tops mobile search

Matthew Whiteway, *Client Services Director*

...If 2012 is to be the year for Mobile Search, agencies and advertisers need to fully embrace it, and find the budgets to invest in it. If the advertisers undertake these tasks effectively, they will finally see the rewards that m-commerce can deliver for business...

When looking at the rise in popularity of mobile internet usage, two old quotes resonate, but not for reasons the authors would have envisaged at the time of writing. Internet inventor Robert Metcalfe said, "the Internet will catastrophically collapse in 1996." Additionally, an 1879 Western Union internal memo read "This 'telephone' has too many shortcomings to be seriously considered as a practical form of communication. The device is inherently of no value to us."

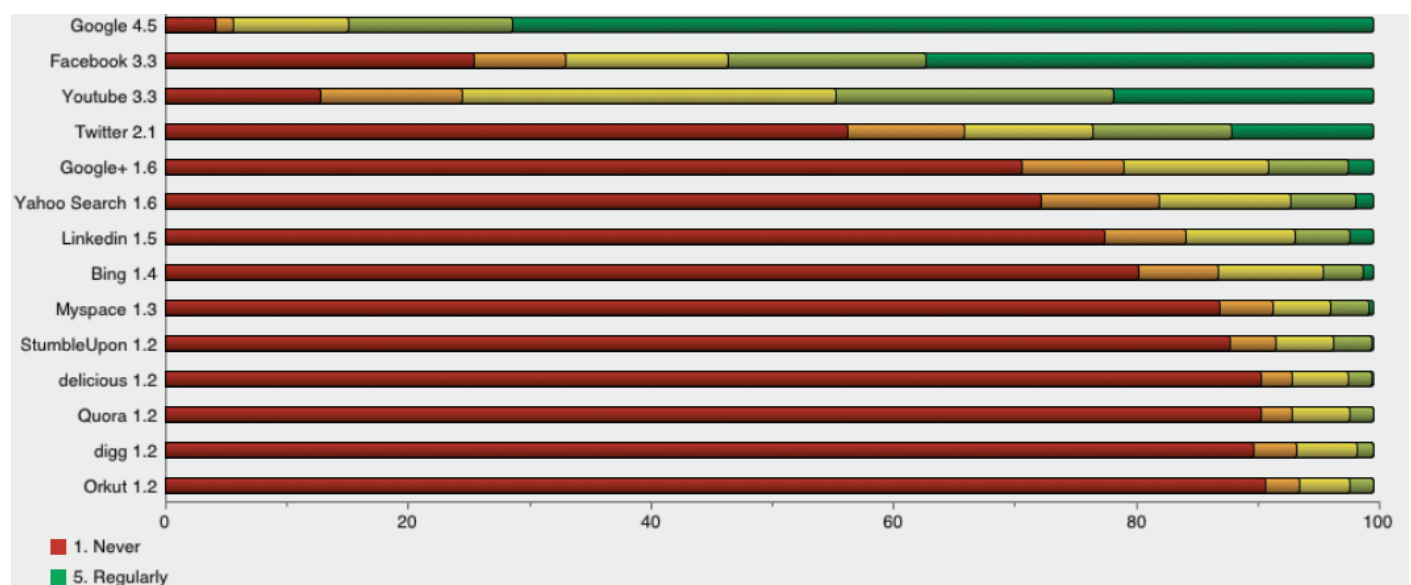
Indeed Robert Metcalfe was correct, albeit a few years early in his prediction. However, I think we can safely say that the Internet is now back and here to stay. According to the Office of National Statistics (ONS) in 2011, 77% of UK households had access to a net connection. That figure was up 4% from the previous year. Furthermore, the usage demographic has been evolving over the past few years, with the UK making up one of the most diverse countries of internet users in the world.

The Western Union internal memo on the other hand was not so accurate! Telephones have proven their value a million times over, so much so that 91% of the UK population feel the need to have a mobile phone and 33.2 million have fixed landlines, including ISDN (Source: Ofcom).

So combining the two seems somewhat inevitable and therefore it is not surprising to see that 45% of UK internet users have accessed the Internet on the go via their mobile device. Where the statistics and the data from Greenlight's Search & Social Media Survey do become interesting however, is when we learn what these users do when accessing the Internet on the go.

Many feel that the most visited site or application would be Facebook, with users wanting to update profiles, upload pictures, post comments and share opinions with their friends. However, from the survey (fig 1) we can see that in fact Google was the destination that the majority of respondents use the most.

Fig 1 - Which of the following do you use on your mobile phone



Source: Greenlight

Coming from a background of traditional search, I find this information fascinating. I was one of those expecting Facebook to dominate mobile internet usage; however with Google still topping the poll, it just shows how important it is for advertisers to have visibility within the mobile Search Engine Results Page (SERP).

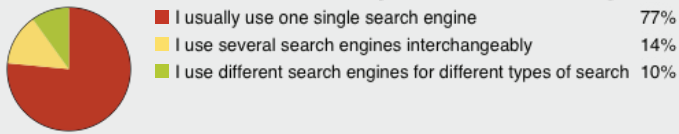
As an agency, we are passionate about data and we have seen the increase in mobile generated traffic for a number of our clients. As such, we ensure we have dedicated campaigns that are tailored for mobile devices as we recognise that the search query, ad messaging, etc., may need to differ from that of traditional desktop targeted campaigns.

Ensuring visibility is of course only part of the process. Once the advertiser has delivered the user to the site, they need to make the experience as easy and pleasurable as possible. Simply dropping a user into a full, mobile unfriendly site is only going to result in increased bounce rates and reduce site wide conversion rates. Generally speaking across the industry there is still some reluctance to accept that the mobile generated traffic will convert for advertisers, and as such far too many advertisers are still taking users to standard websites and simply wondering why they are not seeing the sales roll in.

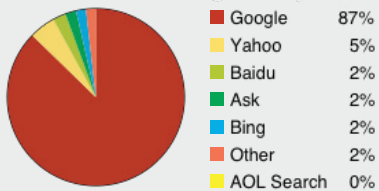
For the past five years we have been told “this really is the year for mobile” by the networks, predominantly Google. Well, I for one feel that 2012 really could be. The handsets and devices are ready, the mobile internet connectivity is robust, the traffic volumes are growing, and cost per clicks are low. Ironically, it’s the advertisers who are holding the growth back.

Search & Social Media Survey 2011/2012 Results

1. Which statement best describes your use of search engines?



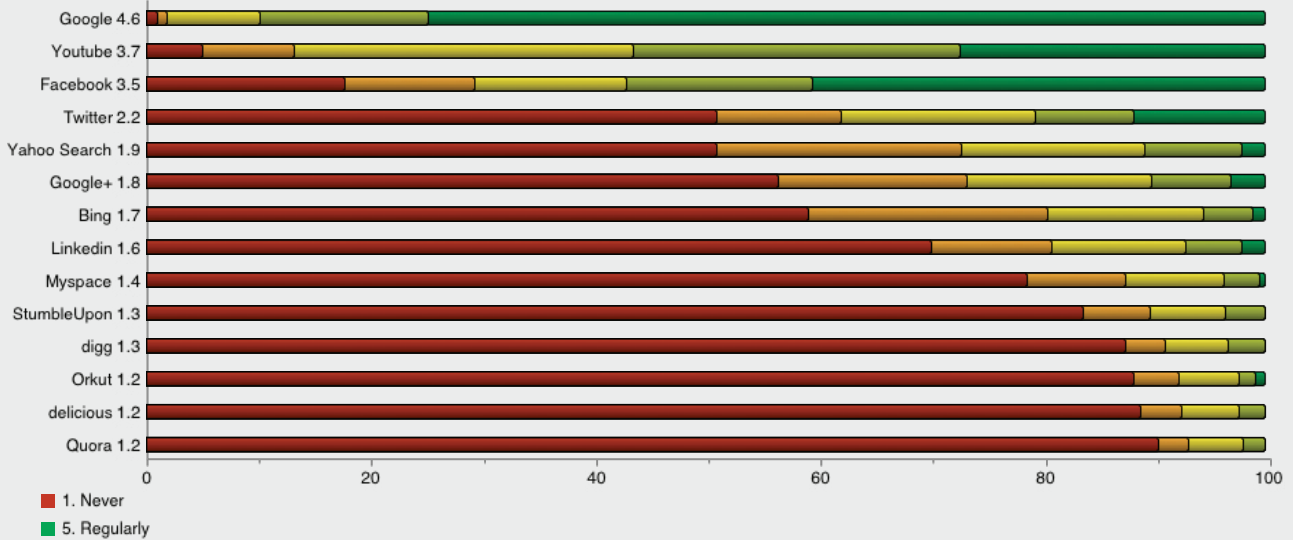
2. Which search engine do you use most?



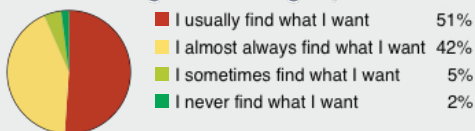
3. Have you ever clicked on an advertisement or sponsored listing in your preferred search engine?



4. How regularly do you use the following websites/services?

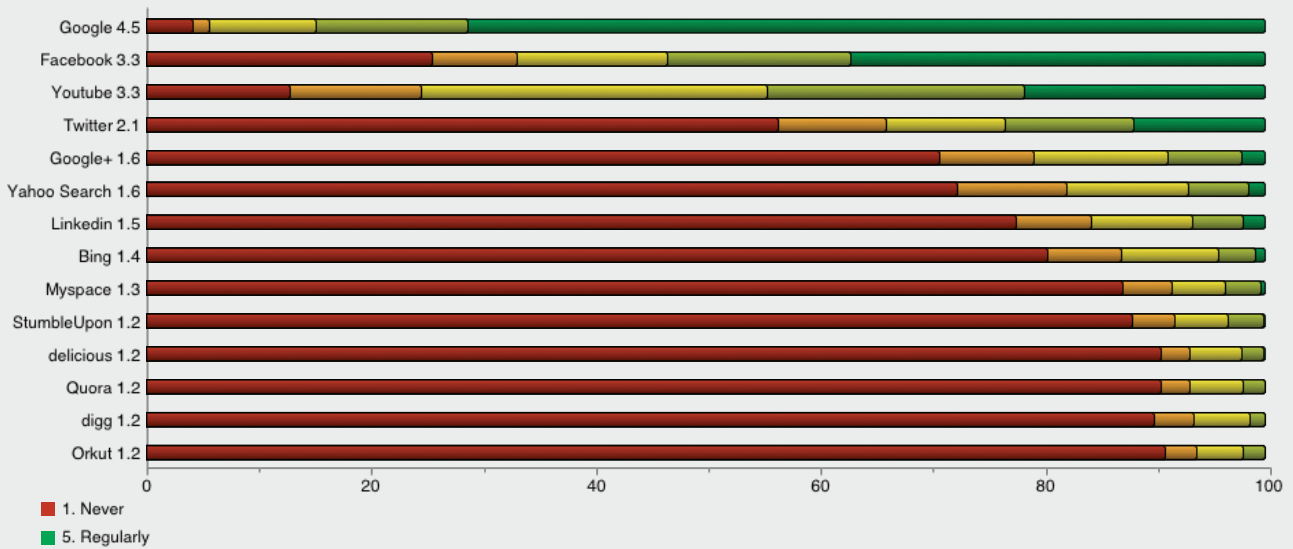


5. When using a search engine, which of the following statements best describes your experiences?

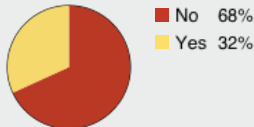


Source: Greenlight

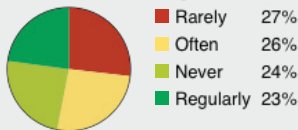
6. Which of the following do you use on your mobile phone?



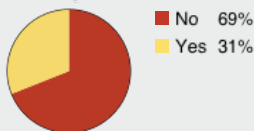
7. Do you know what Search Engine Optimisation (SEO) is?



8. In addition to your local language, do you ever conduct search engine queries in another language?



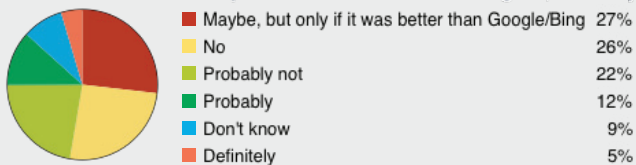
9. Do you know what Google Checkout is?



10. Do you click on advertisements or sponsored listings in Facebook?

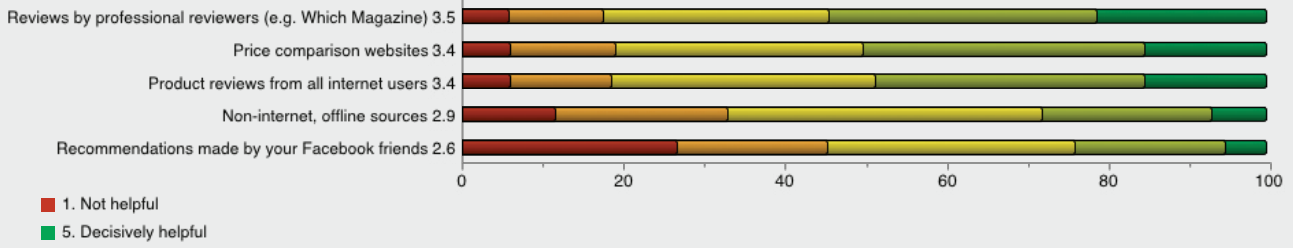


11. If Facebook incorporated its own search engine, would you use it over your preferred search engine?

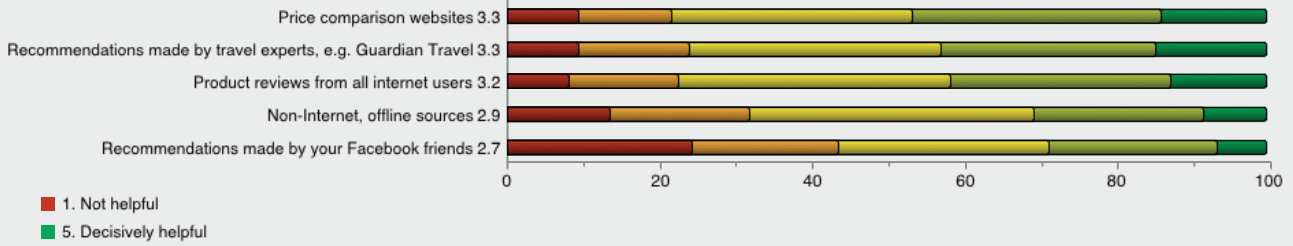


Source: Greenlight

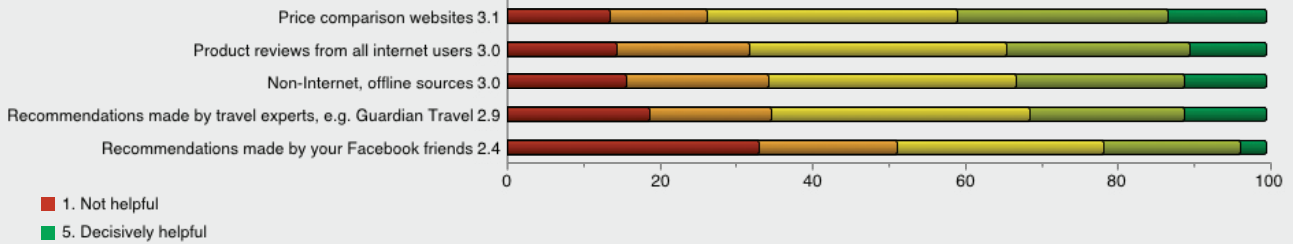
12. If you were looking to buy an electronics product, how helpful would the following be?



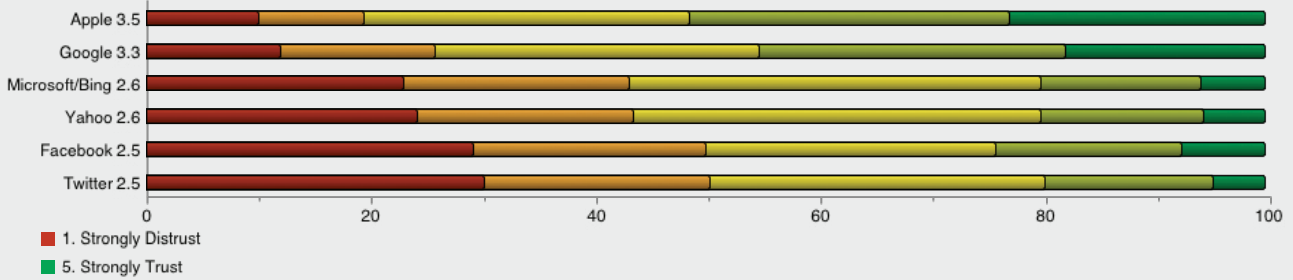
13. If you were looking to book a holiday/vacation, how helpful would the following be?



14. If you were looking to secure insurance (car/home), how helpful would the following be?

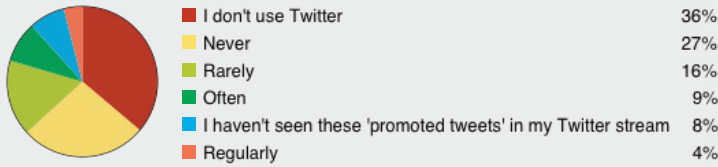


15. How much do you trust the following companies/brands with your personal data?



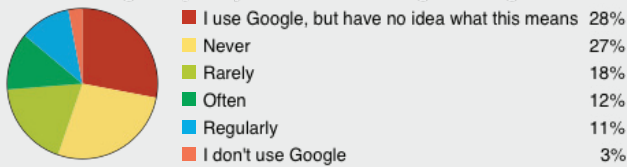
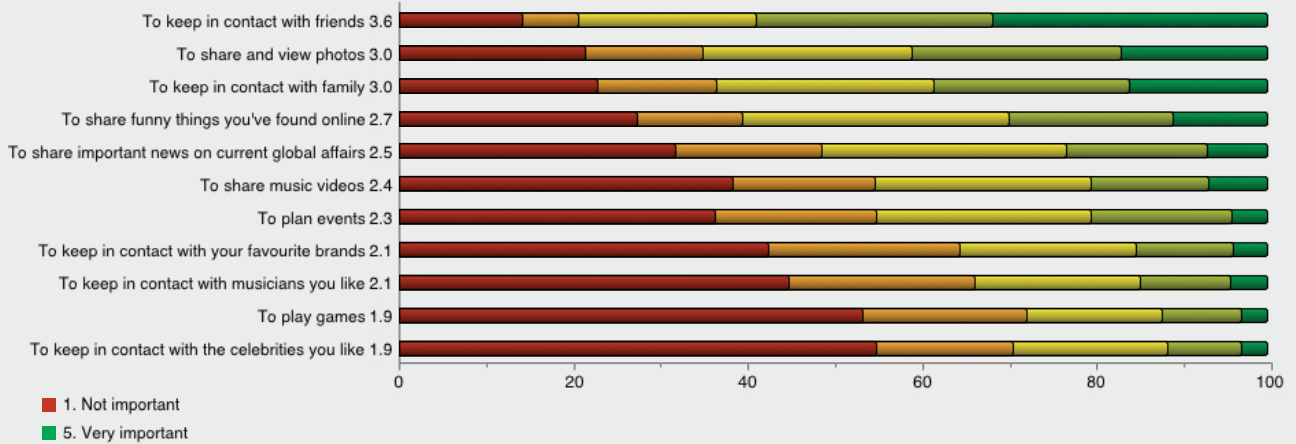
Source: Greenlight

16. How regularly do you 'like' a brand/company on Facebook?

17. Do you click on 'promoted' advertising tweets in Twitter?

18. Which website do you use as your default homepage on your Internet browser?

Number of answers

503

19. How regularly do you '+1' something in Google's search results?

20. Why is Facebook useful to you?


Source: Greenlight

About Greenlight

Greenlight is a leading independent digital marketing agency providing Search and Social Media services. With over 100 blue-chip clients, Greenlight is recognised worldwide for its commitment to delivering record ROI for clients and investing in the future.

Greenlight is considered the premier thought leader, publishing widely read industry reports, original research, speaking at trade events and delivering a highly respected digital marketing training programme via the Greenlight Academy.

If your online marketing efforts need improvement or you have any questions, why not get in touch?

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