



iProspect Search Engine Marketing Integration Study

August 2008

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Objective & Background

In April 2008 iProspect partnered with **JupiterResearch** to develop and field a survey about practices employed by search engine marketers. The initiative had three objectives: to uncover the extent to which search marketing efforts are integrated with a variety of offline marketing channels; to reveal the specific search marketing and integration techniques in use; and to identify obstacles to the integration process.

Based upon the findings of earlier iProspect research, the ***Offline Channel Influence on Online Search Behavior Study***, iProspect felt the topic of integration warranted further exploration. Published in August 2007, the study found that 67% of search engine users had been motivated to perform a search on a search engine in the previous six months as a direct result of exposure to some form of offline marketing. The study also revealed that of that 67%, a full 39% ultimately purchased a product or service from the company that had prompted their original search.

These findings lead iProspect to wonder about the extent to which search marketers were aware of the relationship between other marketing channels and their own, as well as the extent to which they were proactively utilizing other channels to help drive the success of their search marketing efforts.

iProspect's curiosity was further heightened with the publication of the April 2008 ***Blended Search Results Study***. This research found that search engine users were clicking in much greater numbers on "non-traditional" digital assets (such as images, videos, news items, etc.) that have begun appearing "blended" into the natural search results of the major search engines than users did when performing digital-asset-specific searches within the "invisible tabs" of the major search engines. These findings called into question whether search engine marketers were aware of this behavior on the part of search engine users, as well as the extent to which they were utilizing and optimizing these non-traditional digital assets in their organic search engine optimization campaigns as a result.

Note: Throughout this document, the results and conclusions from the *Offline Channel Influence on Online Search Behavior Study*, and the *Blended Search Results Study* will be referenced to contrast and compare the behavior of search engine users to the practices of search engine marketers. A summary of the respective methodologies and each list of questions from those studies can be found in the Appendix of this study.

Study Methodology

In April and June 2008, JupiterResearch conducted a formal survey of search marketers and agencies. Respondents were targeted by familiarity with their company's search marketing efforts and screened for involvement with marketing their own company's products or those of clients. A total of 289 qualified search marketers completed the survey. Respondents received an email invitation to participate in the survey, with an attached URL linked to the Web-based survey form. As an incentive, respondents were entered into a sweepstakes to win one of three iPod Shuffles.

In this survey effort, JupiterResearch worked with Incisive Media's ClickZ network on the technical tasks of sample building and survey fielding. Incisive Media is a fast growing specialist business information provider operating in eight core markets, delivering key information to defined target audiences across a variety of platforms including magazines, conferences and exhibitions, websites, newsletters, contract publishing, and databases.

Executive Summary

The key take-away from this study is that the techniques and practices employed by search engine marketers do not always take advantage of the behavior of search engine users. As a result, under certain circumstances, search marketers are wasting time, effort, and budget that could be better invested elsewhere. Be it the types of digital assets on which search engine marketers focus their optimization efforts, the extent to which they integrate their search marketing campaigns with offline marketing initiatives, the offline channels on which they are focusing their integration efforts, or the techniques they use to integrate their search marketing and offline campaigns – marketers would be well-served to align their efforts to match user behavior.

Below are four findings that highlight the key disconnects between search engine marketer priorities, and search engine user behavior. The fifth finding addresses the organizational obstacles marketers encounter when trying to integrate their search marketing efforts with offline channels.

- When optimizing various types of digital assets, search engine marketers focus on images (58%) more than press releases (32%) and videos (20%). But this prioritization does not correspond with that reported by search engine USERS in iProspect's April 2008 Blended Search Results Study. When measured by their propensity to click on these asset types within the blended organic search results of Google, Yahoo!, and MSN, search engine users attributed importance to them in the following order: news (36%), image (31%), and video (17%). Consequently, search marketers should put more effort into producing and optimizing press releases – which appear as "News" items within the search results – in order to appear, and be clicked by search engine users, within the blended organic search results.

- Only 55% of search engine marketers report intentionally “coordinating or integrating” their search marketing efforts with at least one offline marketing channel. Direct mail (34%) and magazine/newspaper advertising (29%) are the channels with which marketers most frequently coordinate or integrate their search marketing efforts. Both television (12%) and radio advertising (12%) trail well behind in third. In contrast, television advertising (37%) is the leading offline channel when it comes to driving search engine users to perform a search. Consequently, search engine marketers should put more effort into integrating their television advertising with their search engine marketing efforts. And in general, search marketers should invest more effort into integrating their efforts with offline channels given these channels’ ability to drive people to search (67%) and to ultimately make a purchase (39% of the 67%) – according to findings from iProspect’s August 2007 Offline Influence on Online Search Behavior Study.
- The two integration techniques most frequently employed by search marketers are to prominently include the company Web address (84%) and the company name (66%) in offline marketing initiatives. iProspect believes that these two techniques are not optional, but absolute necessities in performing sound fundamental marketing in general – even if one is NOT trying to drive people to search. The technique of utilizing the same keywords in offline campaigns that are used in search marketing campaigns is being employed by just 26% of marketers. This is unfortunate, as this is an extremely effective integration technique that offers marketers significant “bang for their buck” in terms of potential increases in campaign performance. Marketers are strongly advised to invest the effort to employ this technique.
- Perhaps the study’s most surprising finding is that 24% of search marketers report that the reason for not integrating search marketing with offline channels is that their organizations are not participating in offline marketing channels at all. And while it is impressive to see that such a significant percentage of organizations are able to market themselves solely through online means (including search engine marketing), this strategy is ill-advised. Given the aforementioned power of offline channels to drive search referrals and purchases, marketers would be wise to diversify their marketing mix to include offline channels rather than focus 100% of their efforts and budget strictly online.
- The lack of integration between search engine marketing and various offline channels can be attributed to a number of factors, including: lack of budget (19%), lack of human resources (15%), didn’t consider integration (13%), lack of senior management buy-in (11%), and separate people managing search marketing and offline channels (11%). However, there is definitely a correlation between the extent to which these factors serve as obstacles, and the company size and marketing budget of the organization. Marketers are advised to create business cases to present to their senior management – if possible with the assistance of their offline agency partner/s and/or search marketing firm – to justify the investment in human and monetary resources required for integration.

Survey Questions, Results & Analysis

Search engine marketers were asked:

1. "Which of the following organic search tactics have you utilized in the last 12 months? (Select all that apply)"

The results are as follows:

Figure 1:

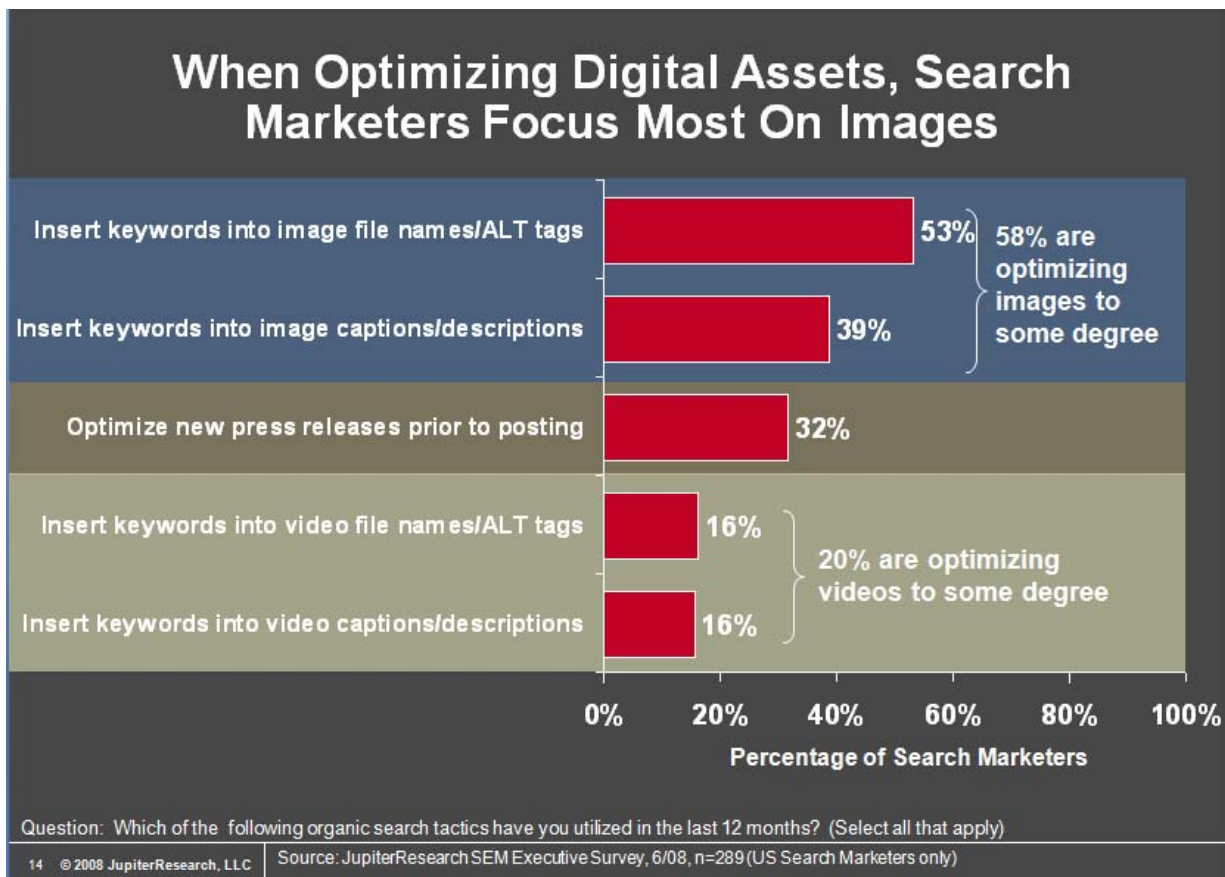
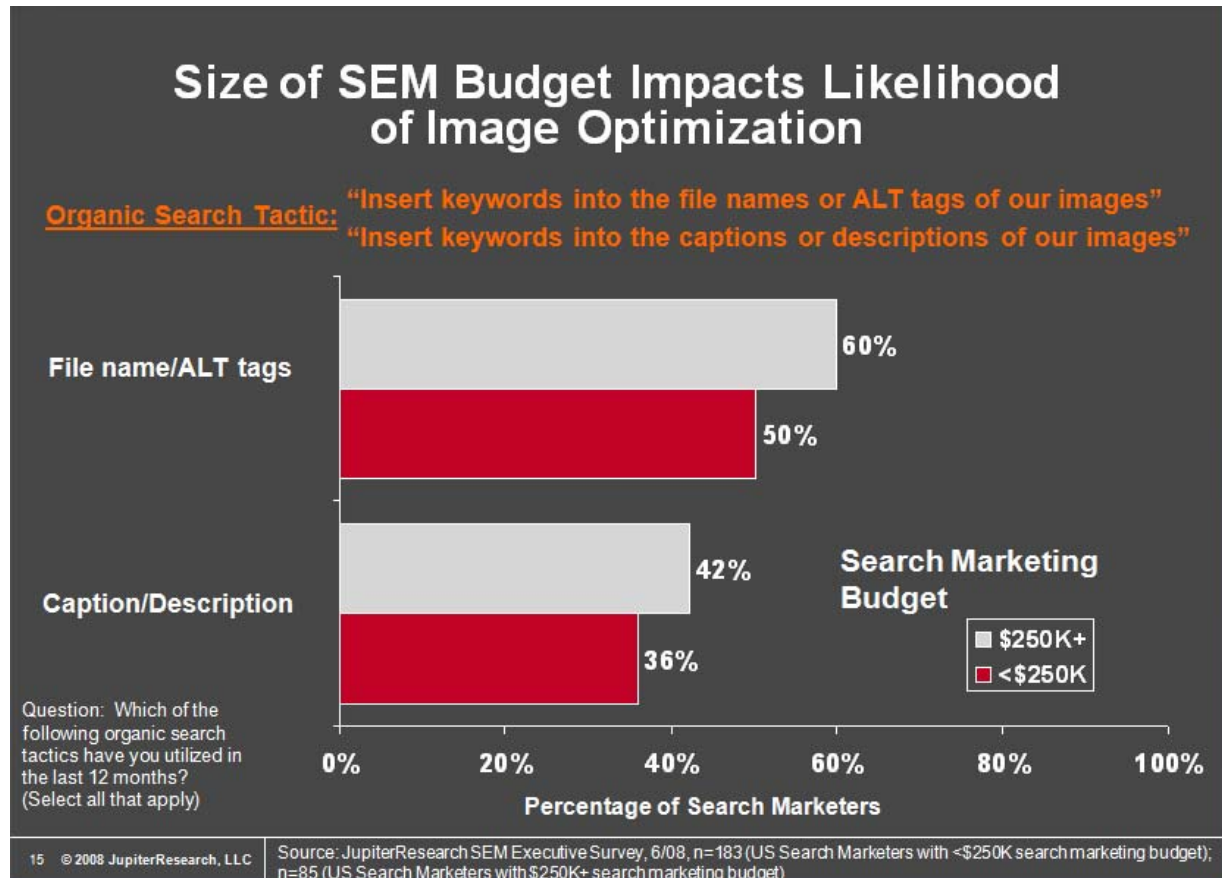


Figure 2:



Analysis

The survey found that 58% of search marketers perform some form of optimization of the images on their websites, while the optimization of press releases at 32%, and the optimization of videos at 20% lagged well behind (See Figure 1).

It should be noted, however, that marketers with higher annual search engine marketing budgets (\$250K+) are more likely to optimize images than those with lower annual search engine marketing budgets (See Figure 2). In addition, the practice of optimizing press releases is more common among marketers with higher budgets (i.e. overall advertising, online advertising, and search marketing budgets) than those with lower budgets in each of those categories. Also, optimization of videos is more common among marketers with higher online advertising budgets than those with lower online advertising budgets. It is not surprising that companies with higher budgets optimize press releases more frequently, as they probably have larger budgets and/or staff to engage in PR than smaller companies. Nor is it surprising that companies with higher budgets also optimize more videos, as they can more readily afford to produce the videos that eventually get optimized.

But beyond budgetary considerations, accessibility surely has its impact. Since marketers work with the assets that their organizations produce, and to which they have ready access, it is also not surprising that search marketers optimize images more than press releases. It is likely that search marketers are closer to the source of images within their organizations than they are to that of press releases. It is also probable that a higher percentage of companies do not engage in public relations (and the resulting publishing of press releases) than do not have images for their website, so the issue of available inventory is more than likely a factor here.

It should not be overlooked that press releases have the advantage of containing significantly more content, more keywords, better context, links, and more ability to be optimized than the file names, ALT tags, captions, and descriptions of images and videos – making them potentially more valuable assets within the natural search results.

Finally, when it comes to creating and optimizing images, videos, and news items, it is important to note that search engine marketers' priorities are NOT aligned with the demand that search engine users demonstrate for these asset types with their click-through behavior – as reported in the iProspect Blended Search Results Study. Marketers optimize images more than press releases, but search engine users click news items more than images.

Advice for Search Marketers

With various forms of digital assets now being blended into organic search results, owning and optimizing multiple digital asset types is no longer optional, but REQUIRED to compete within the natural search results pages. To avoid a disconnect between marketing practices and user behavior, search marketers are advised to pay close attention to where, when, and how often the search engines are displaying each type of digital asset within the results of the keyword phrases that are most important to their business. These will most certainly reflect the asset types clicked most frequently by users – and those on which search engine optimization efforts should be focused.

Those organizations that have not developed their own image libraries, have not produced their own videos, or have not issued press releases, are advised to start pursuing all these activities as soon as they can – perhaps first tackling the easiest of these assets for their organizations to create. But be mindful that development only gets you half way there. In order to fully capitalize upon these newly developed digital assets, they need to be optimized to improve their chances of appearing in the natural search results.

Finally, based on both their inherent optimization advantages, as well as the propensity of search engine users to click them more frequently than images or videos, press releases have much to offer marketers. To best leverage this digital asset type, marketers should establish a regular press release publication schedule, and follow best practices for optimizing those releases.

Search engine marketers were then asked:

2. "At least once during the last 12 months which of the following offline channel(s) did your organization intentionally coordinate or integrate with your search marketing efforts? (Select all that apply)"

The results are as follows:

Figure 3:

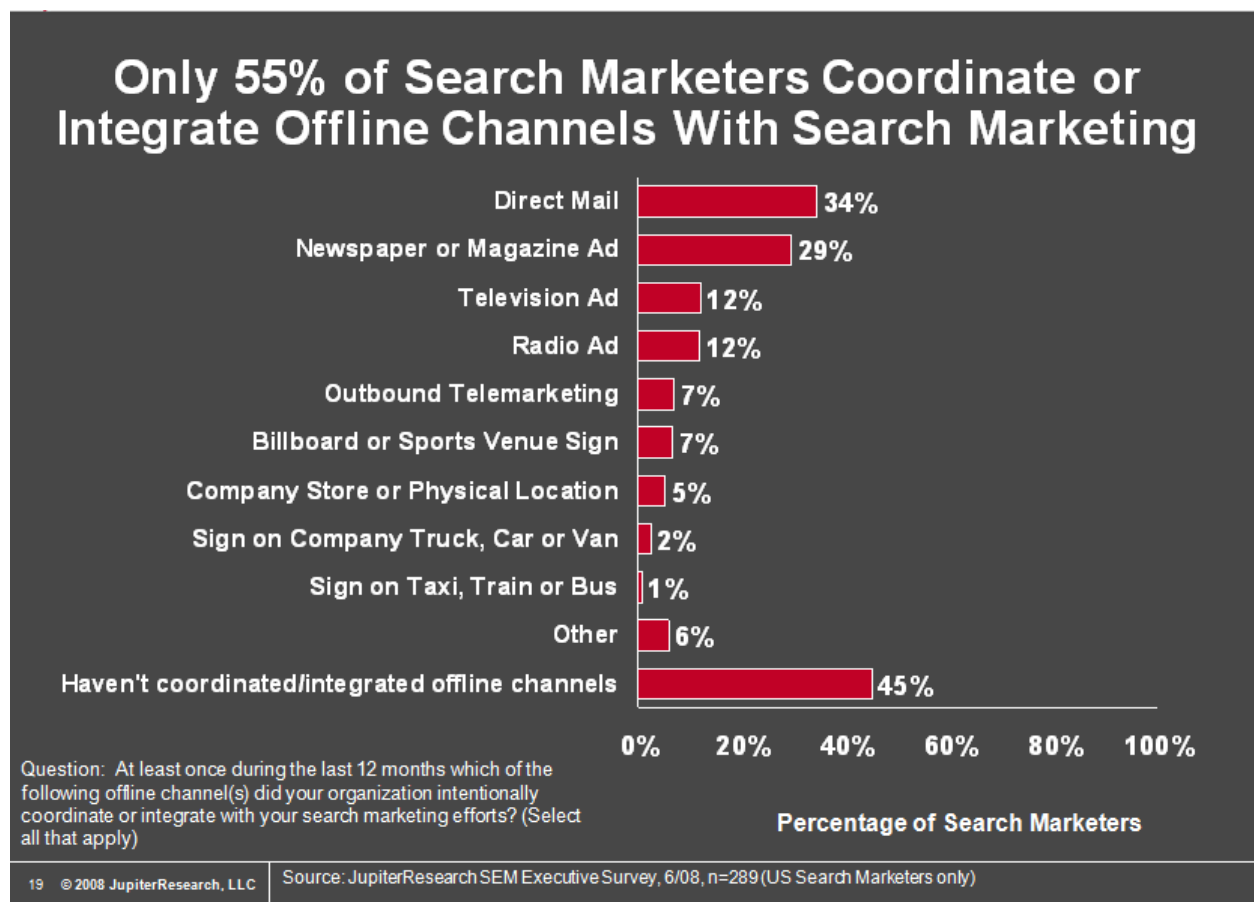
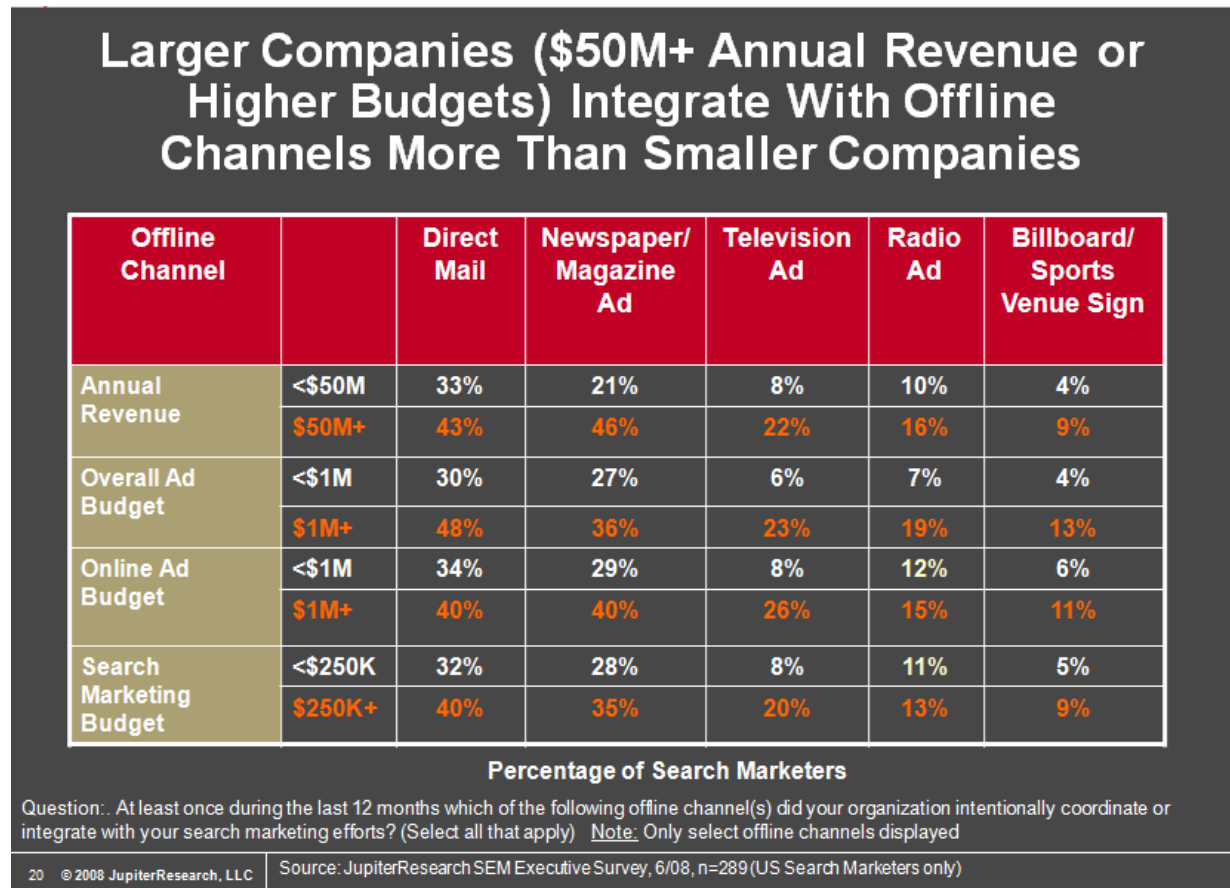


Figure 4:



Analysis

Another key disconnect between search engine marketer practices and search engine user behavior is illustrated by the offline marketing channels whose activities are most frequently integrated with search engine marketing campaigns.

Direct mail at 34%, newspaper or magazine ads at 29%, and television ads at 12% lead the list of offline channels that marketers most frequently integrate with their search engine marketing efforts. A full 45% of companies report that they DO NOT integrate ANY offline channel with their search marketing (See Figure 3).

With all the industry evidence that shows the extent to which integration of offline marketing boosts the effectiveness of search engine marketing campaigns, and the relative ease by which the most fundamental coordination and integration practices can be initiated, iProspect was extremely surprised to learn that only a little over half of search marketers integrate at least one offline channel with their search marketing efforts. Also surprising, given the reach of television and the power it has in driving people to

perform searches – as reported in the iProspect Offline Influence on Online Search Behavior Study – was that more marketers were not integrating their organization’s television campaigns with their search marketing efforts.

Full disclosure: *The direct mail channel was not offered as a potential answer within the survey that resulted in the Offline Influence on Online Searcher Behavior Study published in August 2007, so iProspect has no point of comparison between this channel that search marketers report as the “most integrated” within search engine marketing, and the extent to which search engine users report it as a superior channel at driving them to perform searches. But because it shares the characteristic that exposure to its messaging is not being limited by “time” – as with newspaper and magazine ads and word of mouth – iProspect’s belief is that direct mail would probably have fallen within the top three most productive channels at driving those who were exposed to it to perform searches.*

The finding that direct mail is one of the channels that is most integrated with search marketing does not surprise iProspect due to the frequent organizational relationship that exists between the direct marketing organization and the search marketing organization, the frequent use of search marketing as an extension of an organization’s direct marketing program, and the typical measurement of search engine marketing effectiveness using a direct marketing model. In fact, it is not at all unusual for search marketing campaigns to mirror the sell copy, call to action, and conversion process made by their traditional direct mail campaigns.

It should be noted that a higher percentage of marketers from larger organizations (in terms of annual revenue) and those from organizations with larger overall budgets (for advertising, online advertising, and search marketing), integrate their search marketing efforts with offline channels more than marketers from smaller organizations or those with smaller budgets (See Figure 4).

Advice for Search Marketers

As more marketers discover the power of integrating their respective initiatives, organizations that are not practicing integration will be at a significant competitive disadvantage. Search marketers are advised to “walk down the hall” within their organizations – bearing the gift of data – to inform their offline counterparts as to the keywords, offers, and calls to action within their campaigns that are driving the most traffic, generating the most conversions, and producing the most revenue.

Offline marketers are often starved for this type of intelligence, and when they can get their hands on it, it usually comes at a much higher cost, and is delivered at a much slower rate. Given the low-cost and readily accessible intelligence that search provides, combined with the fact that it is more cost effective to process a conversion online than offline, organizations need to integrate search with as many offline channels as possible. And the integration of search with television, direct mail, and newspaper and magazine advertising should be at the top of your list in order to align search marketing practices with search engine user behavior.

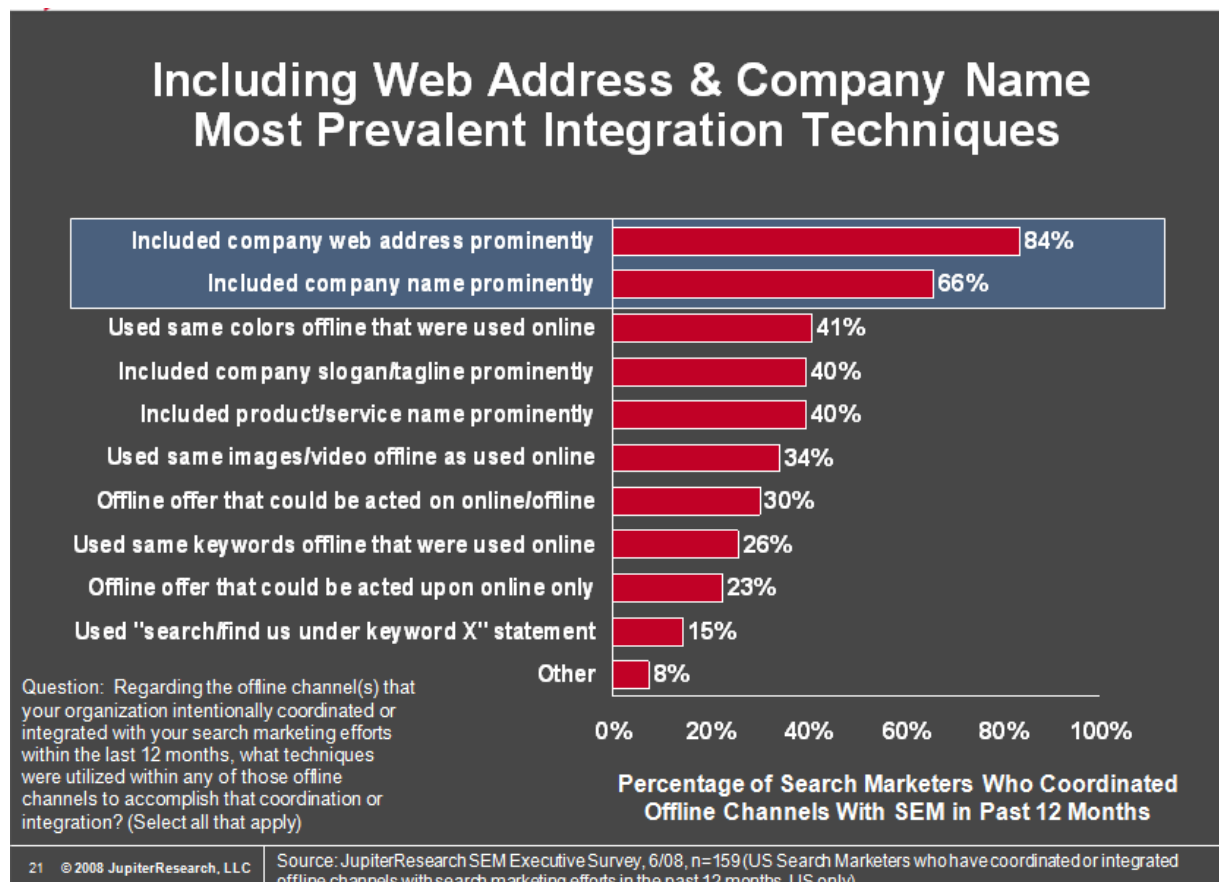
However, this “integration hallway” accommodates two-way traffic. In other words, offline marketers are advised to take a walk down the hall too. And when they visit, search marketers would be wise to listen. Your offline colleagues should have much information to share about their upcoming initiatives – exactly the type of information needed to ensure that the company’s search efforts are in place to capture the demand these offline initiatives will surely generate.

Search engine marketers who coordinated or integrated offline channels with search marketing efforts were then asked:

3. "Regarding the offline channel(s) that your organization intentionally coordinated or integrated with your search marketing efforts within the last 12 months, what techniques were utilized within any of those offline channels to accomplish that coordination or integration? (Select all that apply)"

The results are as follows:

Figure 5:



Analysis

The techniques utilized by marketers to integrate search engine marketing with offline marketing efforts also highlights their failure to understand search engine user behavior.

Inclusion of company Web address (URL) and company name are – not surprisingly – the most frequently utilized techniques for integrating search engine marketing campaigns with offline marketing campaigns (See Figure 5). These are by far the simplest and least expensive techniques to implement, but even the inclusion of the URL in offline messaging can be met with resistance from those within an organization who do not want conversions that they would be able to attribute to their channel (phone, in-store, etc.) taking place online instead.

There is a “category” of integration techniques addressed by the survey that hardly appear to be integration techniques at all, as they are so fundamental to sound, common-sense marketing. Who, for example, would not mention the company name (66%), slogan or tagline (40%), or product/service name (40%) frequently and prominently in their offline marketing? Apparently not everyone, as none are being employed by 100% of marketers. But regardless, this type of integration doesn’t inherently require incremental budget or a great deal of cooperation from other channels in order to be implemented. For the most part these are low cost, low threshold implementation techniques.

Then there is a category of integration techniques focused on consistency, which requires some cooperation, not a lot of cost, and quickly nets a consensus among all parties because to do it otherwise would incur a greater cost. These are techniques like using the same colors offline and online (41%), the same typeface online and offline, the same images and videos online and offline (34%) – essentially taking advantage of assets the company already has, or decisions it has already made, and mimicking them across channels. It’s like boiler-plate certain aspects of all your different marketing campaigns.

Lastly, there is the category of integration techniques that requires certain channels to make changes to the messaging they are using to speak to clients and prospects. Inherent in this category is the need for significant convincing, cooperation, coordination, and often times, cost – as each channel invariably believes the way they are speaking to clients and prospects is the best way, and they do not want to incur the time, effort, and expense of changing it.

Unfortunately, the integration techniques that offer the greatest potential lift in campaign results fall into this very category. Utilizing the same keywords, messaging, offers, and calls to action (proven to be the most profitable within your search marketing campaign) within your offline campaigns as well, requires internal salesmanship and negotiation to gain buy-in, and significant planning to implement.

But it is iProspect’s belief that this category serves as the benchmark that separates sophisticated integration from simple integration, and nets the largest increases in search campaign performance. And since only 26% of search marketers who coordinate their efforts with offline channels report that they are integrating the keywords from their search engine marketing campaigns with at least one offline channel, it is an extremely under-utilized technique, and one that can provide significant lift to search marketing results once implemented.

Advice for Search Marketers

As discussed in Question 2 earlier, effectively implementing integration between the search engine marketing channel and various offline channels often involves a “walk down the hall” within your marketing organization – though the more sophisticated the technique, the more walks you’ll have to make, and the more halls you’ll have to travel. The need to be speaking the same language, utilizing the same look and feel, echoing the same offers and calls to action – both online and offline – cannot be overstated. This technique is vital to capitalizing on the way search engine users behave.

When a visitor arrives at your website as a result of exposure to some form of offline marketing, his eyes and brain immediately seek out the familiar. Does he see and register enough of the things online that he saw or heard in his offline experience to know that he’s arrived at the right place? Does the online messaging immediately start answering his unasked questions that were spawned by the offline messaging? Does he feel reassured? Or is he confused by what he sees? Is there a disconnect between what he saw or heard offline and what he is presented with online?

Obviously, any marketer’s preference would be that a website visitor immediately feel reassured that he is in the right place, and that he believes the curiosity and/or interest that was generated offline will be satisfied by his online experience. Well the most effective way of accomplishing this is with language. Fortunately, search engine marketing holds considerable advantage over offline channels in its ability to rapidly test and refine the language that produces the most profitable campaign outcomes.

Marketers are advised to perform audits of the messaging of each of their offline channels, paying particular attention to the keywords, calls to action, and offers made in each, and compare them to the same factors that have been most successful within their organization’s search engine marketing campaigns. For example, are all of your most productive keywords being included? Are some missing, or are less productive keywords appearing in their place? Does one channel refer to what you are selling as a “service,” while another refers to it as a “solution?” Is the “theme” of the messaging itself the same? Or is the website presenting the company one way, and the offline messaging presenting it another way? Are the calls to action the same? Does one urge people to take advantage of an end of season sale before it ends, and the other highlights the company’s new free shipping policy? In summary, you need to establish whether or not a disconnect exists between channels.

Ultimately, marketers need to identify the key differences between offline messaging and the messaging that your search campaigns have shown to be superior. From that data, you can then make recommendations, and work toward change – even if it is one word at a time and one channel at a time. Slow and gradual progress is progress nonetheless, and buy-in and cooperation is often more easily achieved when the pace is slow. As measureable improvements in performance are achieved, be sure to communicate these internally so anyone who might be hesitant to integrate their efforts with search may become more willing to do so.

Also, don’t forget to update offline calls to action so that customers and prospects have the choice of responding either online or offline. Not only is it typically more cost effective to process a conversion online than offline, but the anonymity of responding online – compared to over the phone, for example – appeals to a percentage of your prospect universe who otherwise might not respond if not given the alternate choice.

Pursuing these types of activities will go a long way to align your search engine marketing practices with search engine user behavior.

Finally, search engine marketers were asked:

4. "Regarding the offline channel(s) that were NOT intentionally coordinated or integrated with your search marketing efforts within the last 12 months, what were your organization's reasons for not coordinating or integrating? (Select all that apply)"

The results are as follows:

Figure 6:

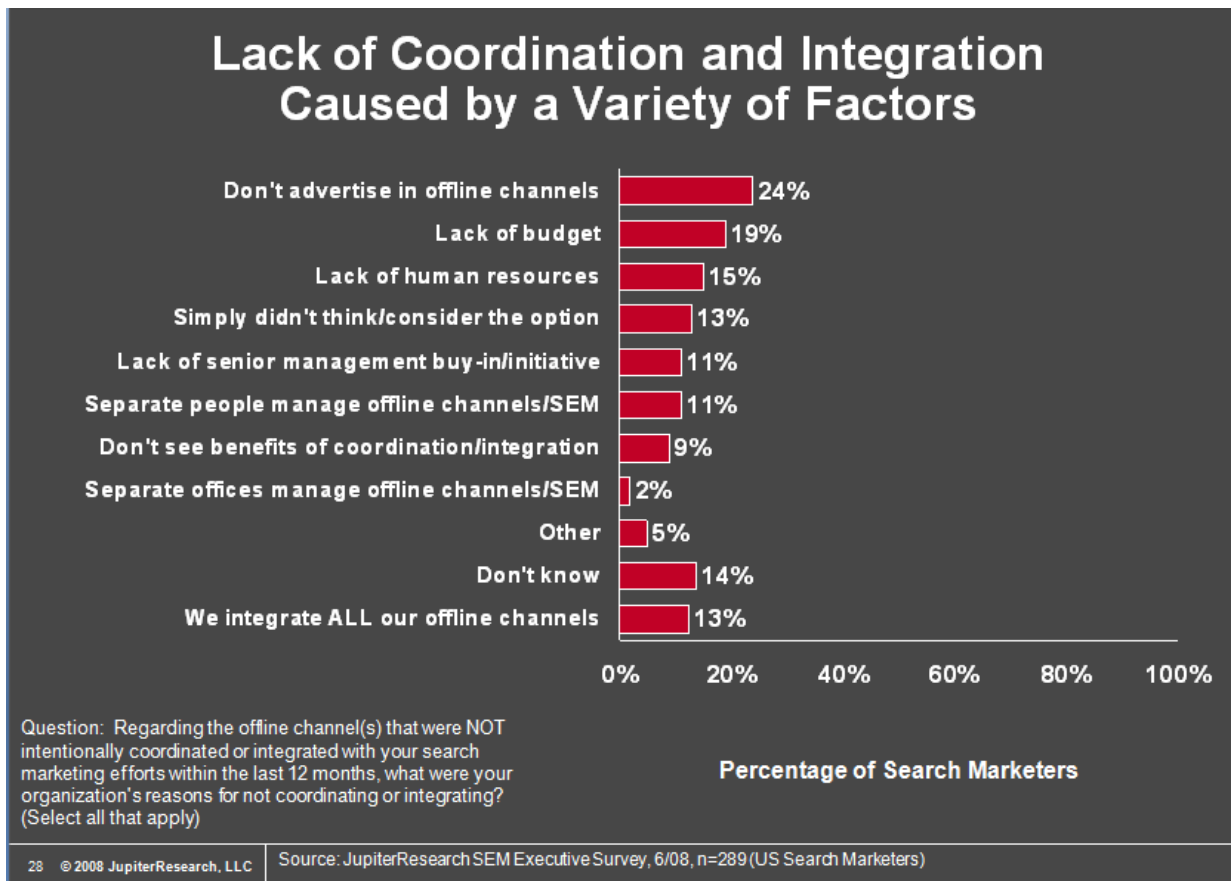


Figure 7:

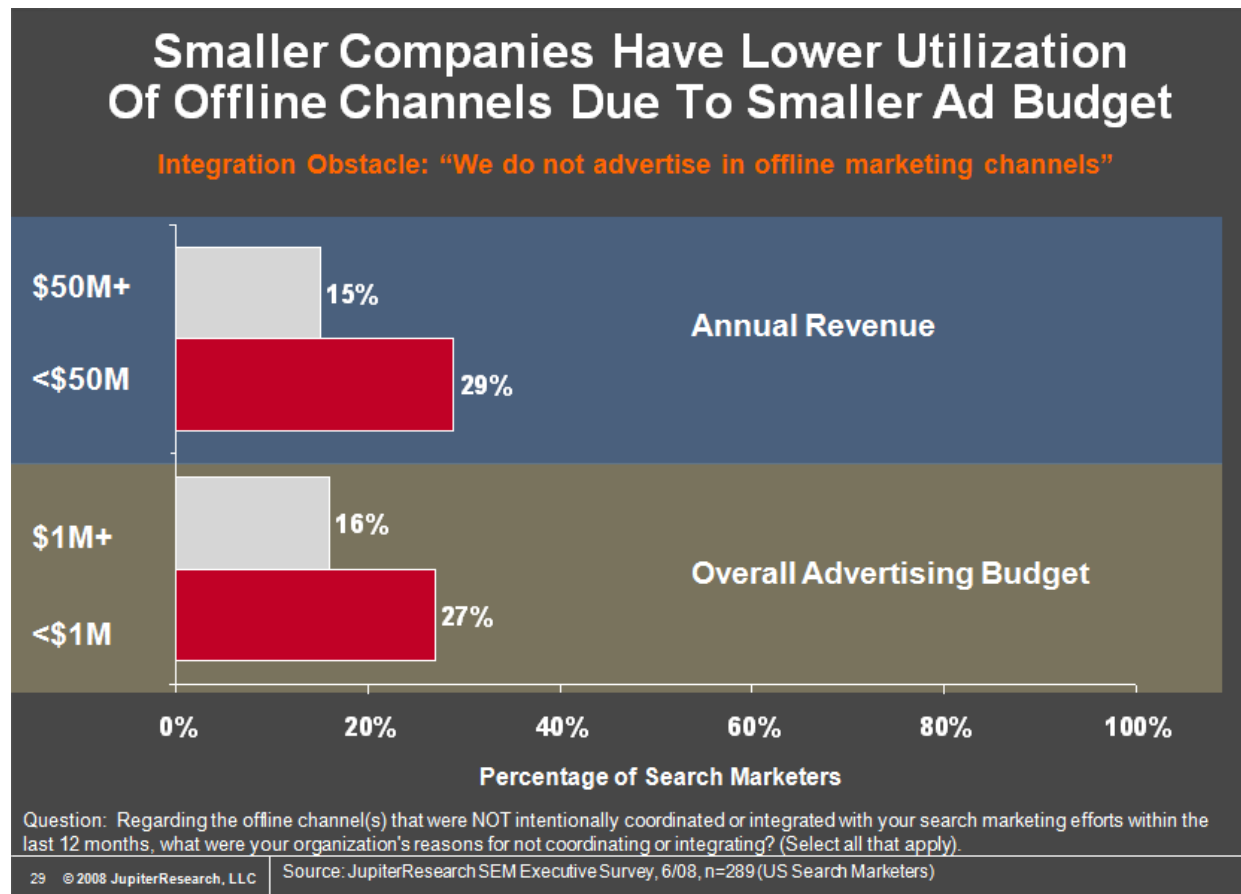


Figure 8:

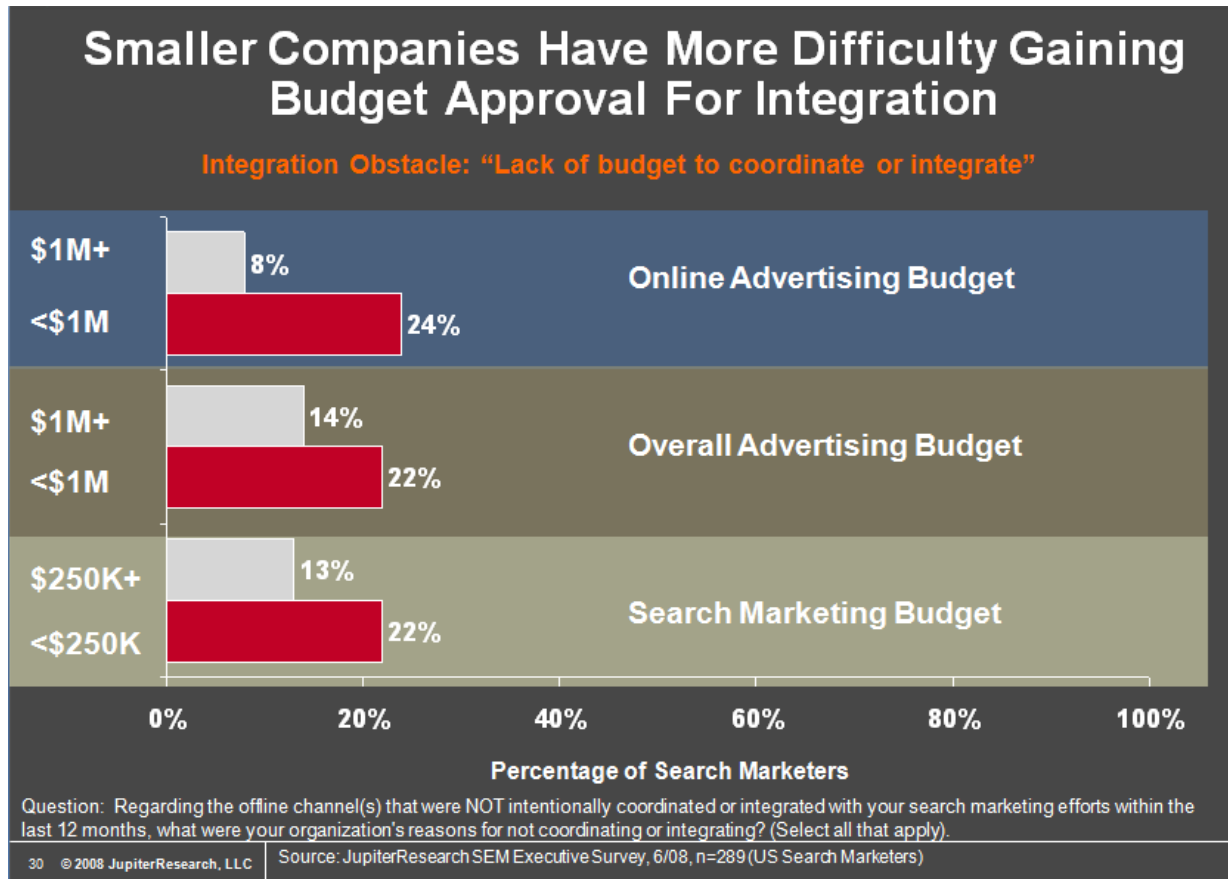
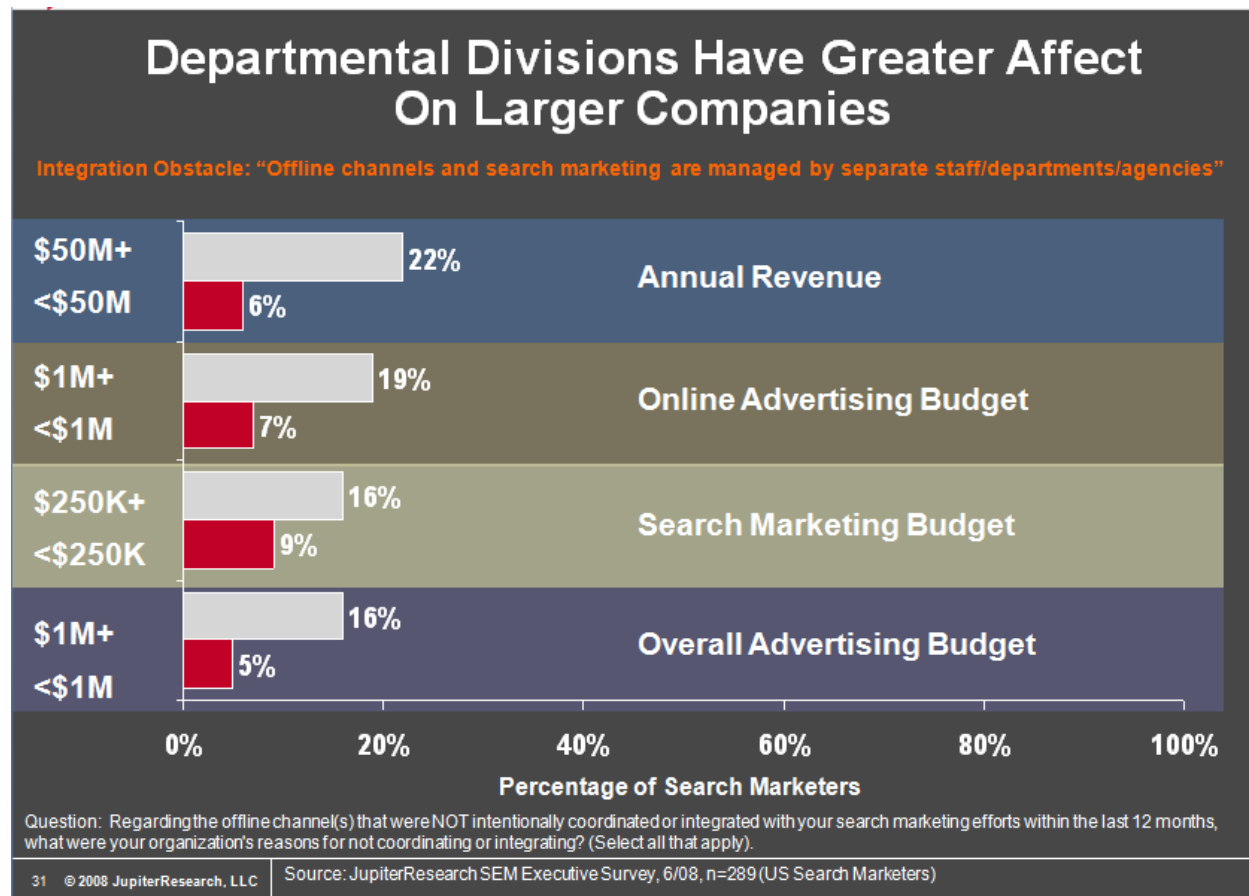


Figure 9:



Analysis

Achieving integration between search and online channels can be a challenging endeavor. In fact, the study shows that marketers can encounter significant organizational obstacles to integration. For example, limited budget, human resource constraints, senior management buy-in, and the simple failure to consider integration as a viable strategy, are all factors that search marketers report prohibit them from integrating certain offline channels with search. But whatever the reason, such organizational obstacles ultimately prevent search marketers from capitalizing on the power of offline channels to drive search engine user behavior.

The survey found that 24% of the search marketers report that their organizations do not engage in ANY form of offline marketing (See Figure 6). This finding speaks volumes about the effectiveness of search and other online channels in helping marketers achieve their business goals. But it is iProspect's belief that omission of all offline channels from an organization's marketing mix is an ill-advised strategy.

Yes, search engine marketing is the ultimate form of permission-based marketing – “pull-marketing” if you will. And yet it also serves as a conduit through which interest generated through various forms of offline “push” marketing can perform additional purchase-related research, and eventually convert. So organizations that are focusing all their attention on search marketing as a “pull” technique, and are not using offline “push” techniques to drive people to perform searches, are only taking advantage of part of the effectiveness of search, and are “leaving money on the table” in the process.

The survey also revealed that marketers at smaller organizations (in terms of annual revenue), as well as those with lower overall advertising budgets, participate in offline marketing channels less than marketers at larger organizations and at organizations with larger overall marketing budgets (See Figure 7). Smaller companies also have more difficulty gaining budget approval for integration of offline marketing channels with their search marketing efforts, compared to larger companies (See Figure 8). And having multiple departments manage offline channels and search marketing efforts is a greater impediment to integration for marketers with higher overall budgets than for those with smaller budgets (See Figure 9).

The reasons behind these size-specific limitations/obstacles are completely logical – that smaller organizations have smaller budgets to fund a broad marketing mix, as well as to fund integration efforts. Larger companies – where budget is less of a factor – struggle with the challenges posed by decentralized, “siloesd” marketing organizations that manage separate pieces of the marketing mix, and can even be geographically separated.

It’s also intuitive that the integration techniques that marketers most frequently employ are the ones that are the easiest to implement – as can be seen from the results in Question 3 earlier. As the integration techniques get more sophisticated, need more advanced planning, and require more collaboration with individuals who are managing other channels, the frequency of their adoption decreases. This phenomenon is not unlike that of certain search engine optimization techniques recommended to search marketers by their search engine marketing firms, and the subsequent implementation of those techniques. Invariably search marketers implement the “low-hanging fruit” first, regardless of its inherent value compared to the more difficult initiatives that potentially offer greater returns.

Advice for Search Marketers

What the 45% of search engine marketers who are not integrating offline marketing activities with search marketing (and the 24% whose companies are not even participating in offline marketing) are missing is that performing simple, basic integration need not be expensive, nor need it involve massive collaboration and cooperation among lots of conflicting constituencies, nor need it involve huge investments in offline channels. Marketers are advised to start small and immediately. For instance, including your website’s URL in any offline marketing initiatives where it is currently missing is vital, as it is to offer the ability to respond to any offline campaign via online means.

To get started, marketers should seek out one individual responsible for one offline channel and convince him to commit to a test limited to a certain geographic market, or a specific product, for a limited period of time, and measure the lift in search traffic and/or conversions from that geography or for that product over the test period. Offer to fund the test from your search marketing budget if you can afford to and your colleagues within other channels cannot. Then internally publicize the results of that test to those responsible for other offline channels within your organization, and start building momentum as additional channels are tested, results generated, and roll-outs performed.

Also, look at the messaging being used by your competitors in their offline initiatives. If you are not performing any offline marketing, using the messaging of your search engine marketing campaigns to match the messaging being used by your competitors' offline campaigns gives you the opportunity to capture the demand that their offline dollars produce – so long as their messaging is not in conflict with your brand.

Channels (some of which you might not even think of as “channels”) where this can be jump-started easily and relatively inexpensively include: signage within your stores/physical locations, cash register receipts, customer invoices, existing radio ads, as well as existing newspaper and magazine ads. Buying a new company truck or van anyway? Paint the URL on every side. Running a new billboard ad? Include the URL there as well. Is your URL too long or not intuitive? Buy the top spot in the sponsored search listings for a relevant keyword and use “Find us online under _____” as often as you use “Call us toll-free at _____” within your offline marketing campaigns.

Use these techniques to achieve “little wins” that can serve as ammunition to combat organizational obstacles in budget, resources, buy-in, and initiative. In time, some of these barriers will begin to fall, allowing you to create more wins, internally publicize your successes, and build momentum in your efforts to better align your search engine marketing practices with search engine user behavior.

About iProspect's Research

Founded in 1996, iProspect is the Original Search Engine Marketing Firm. We help organizations with large, complex websites increase their online ROI and market reach through natural (organic) search engine optimization, pay per click advertising management, paid inclusion management, shopping feed management, and other related services. By dramatically increasing business results for clients, iProspect helps to create search marketing heroes every day.

iProspect has a long legacy of research and thought leadership in the search marketing industry:

[iProspect's Blended Search Results Study](#) in April 2008

[iProspect's Offline Channel Influence on Online Search Behavior Study](#) in August 2007.

[iProspect's Search Marketer Measurement & Performance Study](#) in June 2007.

[iProspect's Search Marketer Social Networking Study](#) in May 2007.

[iProspect's Social Networking User Behavior Study](#) in April 2007.

[iProspect's Search Engine User Behavior Study](#) in April 2006.

[iProspect's Natural SEO Outsourcing Study](#) in August 2005.

[iProspect's SEO Metrics & ROI Study](#) in August 2005.

[iProspect's Search Engine Marketer Performance Study](#) in August 2005.

[iProspect's Natural SEO Keyword Length Study](#) in November 2004.

[iProspect's Search Engine User Attitudes Study](#) in April 2004.

Findings from iProspect research are regularly used to enhance our service offerings and to educate clients on search engine marketing best practices and industry trends. iProspect studies are frequently quoted by speakers at search marketing industry events, and by both business and trade press.

Proper attribution requires that any references to the study be clearly identified as coming from the "iProspect Search Engine Marketing Integration Study."

With U.S. offices in Watertown, Massachusetts and San Francisco, California, as well as offices **across the globe**, iProspect can be contacted at 1-800-522-1152, or by visiting www.iprospect.com.

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Appendix

A. August 2007 Offline Channel Influence on Online Search Behavior Study (Methodology)

In June 2007, JupiterResearch designed and fielded a survey to U.S. online users (heretofore referred to as "online users" who may or may not be users of search engines) selected randomly from the Ipsos U.S. online consumer panel. A total of 2,322 individuals responded to the survey. Respondents were asked approximately 25 closed-ended questions about their behaviors, attitudes, and preferences as they relate to games, digital imaging, portable devices, and service bundles.

Respondents received an email invitation to participate in the survey with an attached URL linked to the Web-based survey form. The samples were carefully balanced by a series of demographic and behavioral characteristics to ensure that they were representative of the online population. Demographic weighting variables included age, gender, household income, household education, household type, region, market size, race, and Hispanic ethnicity.

Additionally, JupiterResearch weighted the data by AOL use, online tenure, and connection speed (broadband versus dial-up), which are three key determinants of online behavior. Balancing quotas are derived from JupiterResearch's Internet population model, which relies on U.S. Census Bureau data and a rich foundation of primary consumer survey research to determine the size, demographics, and ethnographics of the U.S. online population. The survey data are fully applicable to the U.S. online population within a confidence interval of plus or minus three percent.

B. August 2007 Offline Channel Influence on Online Search Behavior Study (Questions)

1. Please indicate to what extent you agree/disagree with the following statement: "Over the last year, performing searches using search engines has become more important in my use of the Internet." (Select one)

- Strongly Agree
- Somewhat Agree
- Neutral
- Somewhat Disagree
- Strongly Disagree
- I have not performed any search using a search engine in the past year

2. Within the last 6 months, how often have you performed an Internet search using a search engine? (Select One).

- Multiple times a day
- At least daily
- At least weekly
- At least monthly
- Less than monthly
- I have not performed a search using a search engine in the past 6 months

3. Within the last 6 months, which of the following prompted you to go to a search engine to look for information on a particular company, product, service or slogan? (Select all that apply).

- Television ad
- Word of mouth from friend/acquaintance
- Magazine/newspaper ad
- Company's store/physical location
- Radio ad
- Billboard, indoor sports venue sign
- Ad/company name on company truck/van/car
- Ad/company name on taxi/train/city bus
- I have not performed a search as a result of any of these

4. Thinking about the last time within the last 6 months that you were motivated to conduct an Internet search by one of the sources listed in the previous question, which of the following keywords did you first use when conducting that search? (Select one)

- All or part of company name
- All or part of product/service name
- All or part of company/product slogan or advertising
- Other keyword(s)
- I don't remember

5. Which of the following sources (that you mentioned previously had prompted you to use an Internet search engine) eventually led you to make a purchase from that company/product/service? (Select all that apply)

- Television ad
- Word of mouth from friend/acquaintance
- Magazine/newspaper ad
- Company's store/physical location
- Radio ad
- Billboard, indoor sports venue sign
- Ad/company name on company truck/van/car
- Ad/company name on taxi/train/city bus
- None of these sources actually prompted me to make a purchase
- I don't remember

C. April 2008 Blended Search Results Study (Methodology)

In December 2007 and January 2008, JupiterResearch designed and fielded a survey to online consumers selected randomly from the NPD U.S. online consumer panel. A total of 2,404 individuals responded to the survey. Respondents were asked questions about their behaviors, attitudes, and preferences as they relate to portable and home consumer electronics devices, home networks, search engine use, and data and voice services. Respondents received an email invitation to participate in the survey with an attached URL linked to a Web-based survey form. The samples were carefully balanced by a series of demographic characteristics to ensure that they were representative of the U.S. adult online population.

Demographic weighting variables included age, gender, household income, household education, household type, region, market size, race and Hispanic ethnicity. Additionally, JupiterResearch weighed the data by AOL usage, online tenure, and connection speed (broadband versus dial-up), three key determinants of online behavior. Balancing quotas are derived from JupiterResearch's Internet population model, which relies on U.S. Census Bureau data and a rich foundation of primary consumer survey research to determine the size, demographics, and ethnographics of the U.S. online population. The survey data is fully applicable to the U.S. adult online population within a confidence interval of plus or minus 3%.

In this survey effort, JupiterResearch worked with its research partner, NPD, on the technical tasks of survey fielding, sample building, balancing, and data processing. NPD is one of the largest market research companies in the U.S. and maintains a general research panel of 4 million individuals, of which 750,000 are kept "active." The active panel receives surveys while inactive panelists are rested. This rotation in and out of active status helps keep panelists fresh and prevents burnout. Panel-based market research enables researchers to have baseline knowledge of each survey respondent and increase survey participation rates.

D. April 2008 Blended Search Results Study (Questions)

1. Thinking about a search result you clicked on in the past 6 months on Google, Yahoo!, or MSN, which of the following narrowing options did you use to reach that result? (Select all that apply)

- Image search
- News search
- Video search
- I don't recall
- I have not used any of these narrowing options when performing a search
- I have not performed a search with Google, Yahoo!, or MSN

2. Within the last 6 months, when performing a general search within Google, Yahoo!, or MSN (not using the narrowing options described in the previous question), which of the following types of results have you clicked on? (Select all that apply)

- News item
- Image
- Video
- I don't recall
- I have not clicked on a news, image, or video result
- I have not performed a search with Google, Yahoo!, or MSN

3. When you perform a search on a search engine and are looking over the results, approximately how many results do you typically review before clicking one? (Select One)

- Only a few
- The first page
- The first 2 pages
- The first 3 pages
- More than 3 pages
- I do not use search engines

4. When you perform a search on a search engine and don't find what you are looking for, at what point do you typically either revise your search, or move on to another search engine? (Select one)

- After reviewing the first few search results
- After reviewing the first page of search results
- After reviewing the first 2 pages of search results
- After reviewing the first 3 pages of search results
- After reviewing more than the first 3 pages of search results

5. Please state how much you agree/disagree with the following statement: 'Seeing a company listed among the top results on a search engine makes me think that the company is a leader within its field.' (Select one)

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree