BRAND VALUE OF SEARCH (ACROSS SCREENS)

Meta-Analysis across
6 countries and 38 brands

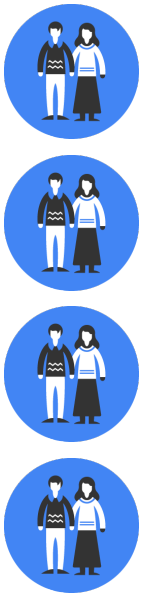
Hamburg, June 2015

Google

Deducting the brand value of search

All results in this meta-analysis are based on controlled experiments.

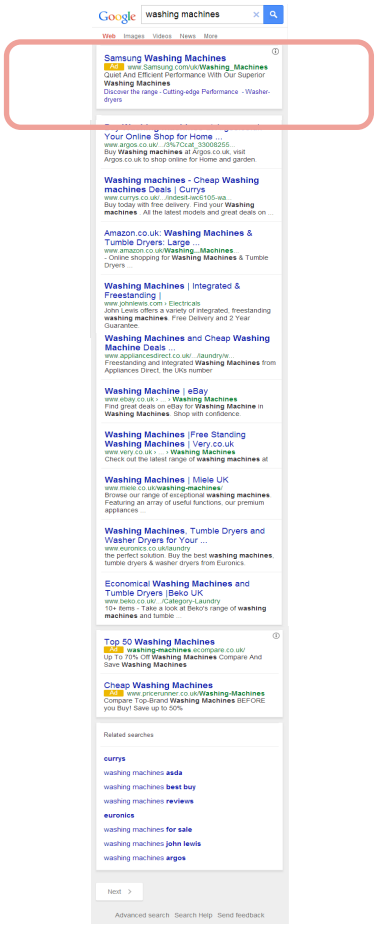
A random set of users is invited to the study

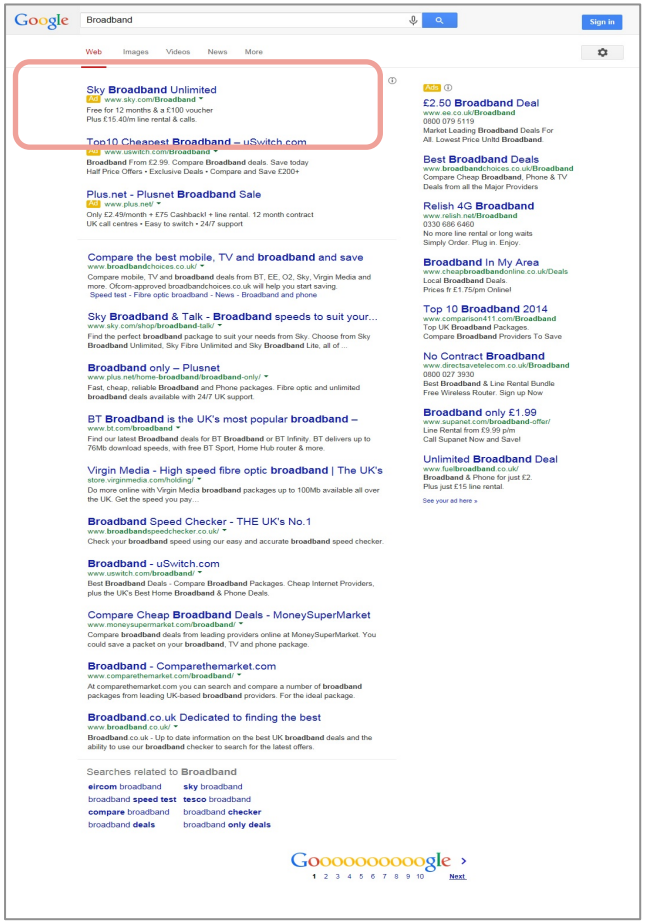


They conduct a search (task), randomly some see ads and others don't

They fill in a survey on brand metrics; results are compared for exposed vs. non-exposed

Test conditions:
Exposure to top sponsored link





Data base

We look at results for 38 brands from six countries across various industries.
All brands in the analysis have been tested across screens (desktop / mobile).

About the meta analysis (methodology)

To run a meta-analysis across this variety of studies we accounted for the Hilton OR of each study as a measure of effect size and conducted a random-effect modeling following the DerSirmonian and Laird method (1986).
The analysis was done using open source software OpenMetaAnalyst.

A detailed description of the approach can be found in this paper.

In short, the advantage of the methodology compared to “simply taking an average across all studies” is threefold:

1. It takes the heterogeneity of analysed studies into account (e.g. different sample sizes or different base levels)
2. It takes care of outliers to minimize their impact
3. For significance testing it is not easily blinded by massive case numbers due to summing up a lot of studies (which basically might lead to very small effects becoming significant out of sheer case number volume)

Brand metrics along the funnel

This presentation looks at the following set of brand metrics.
Please note: not every metric has been measured in every study.

Do you agree: brand X is the market leader.

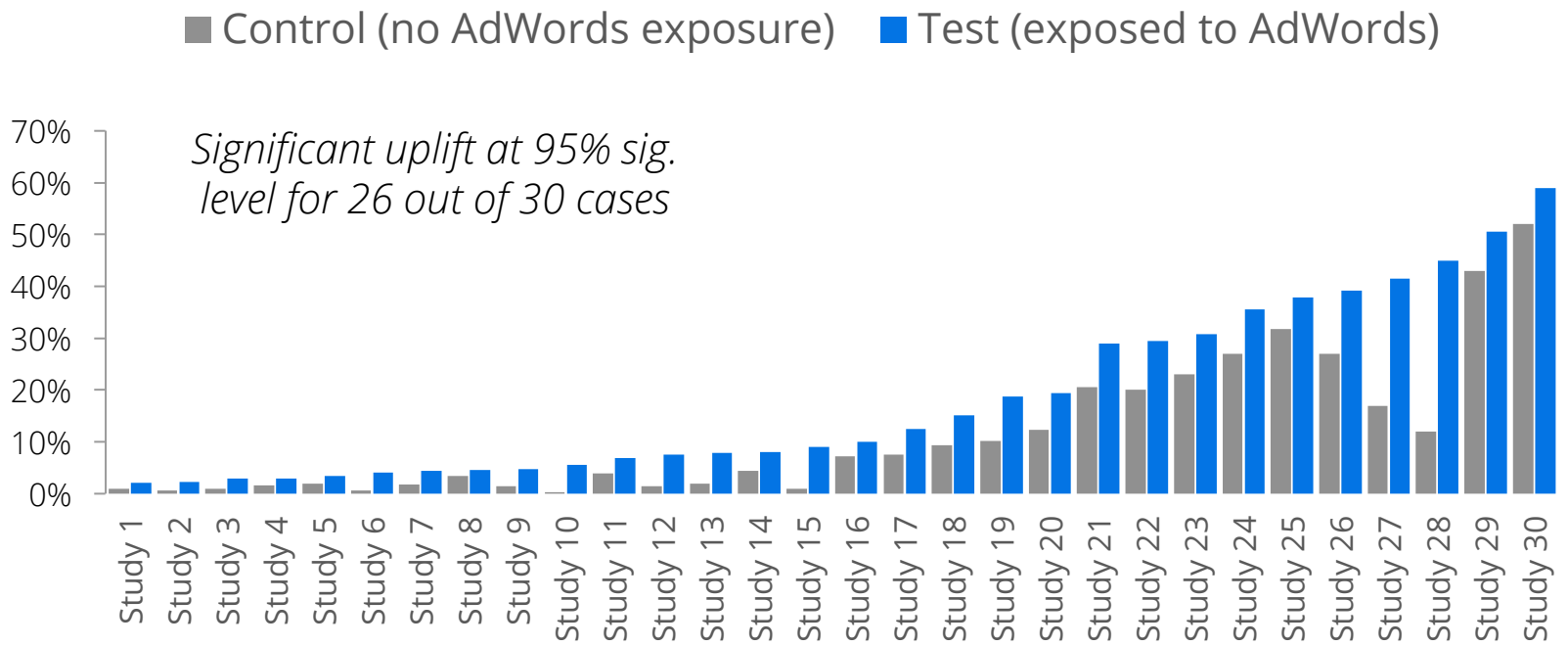
Do you recall seeing advertising for brand X?

Thinking of industry X:
which brands come to mind?

Thinking of industry X:
which one brand spontaneously comes to mind?

Top of mind awareness

Across 30 case studies we observed on average a positive impact of ad exposure on Google Search on top of mind awareness.

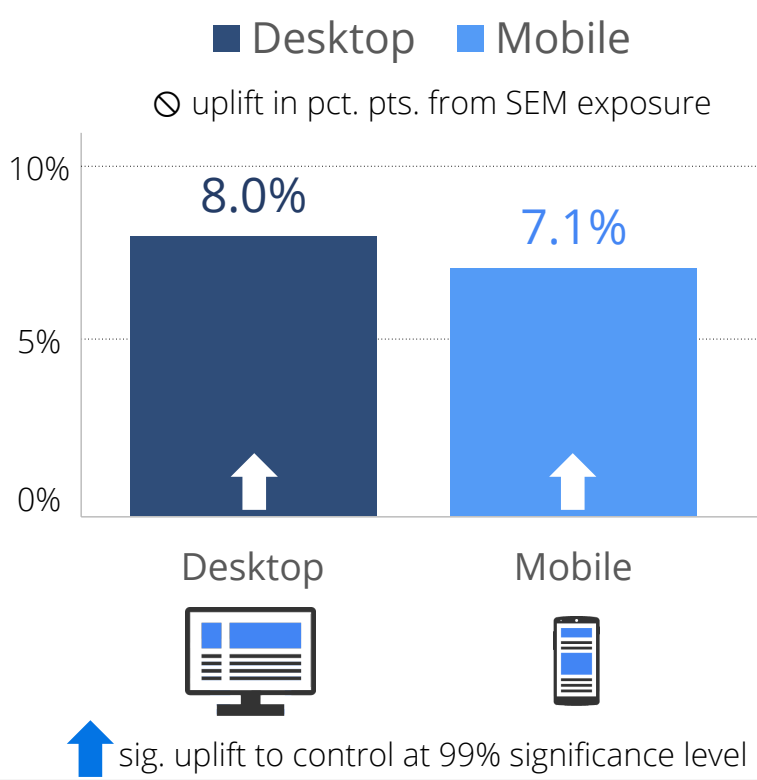


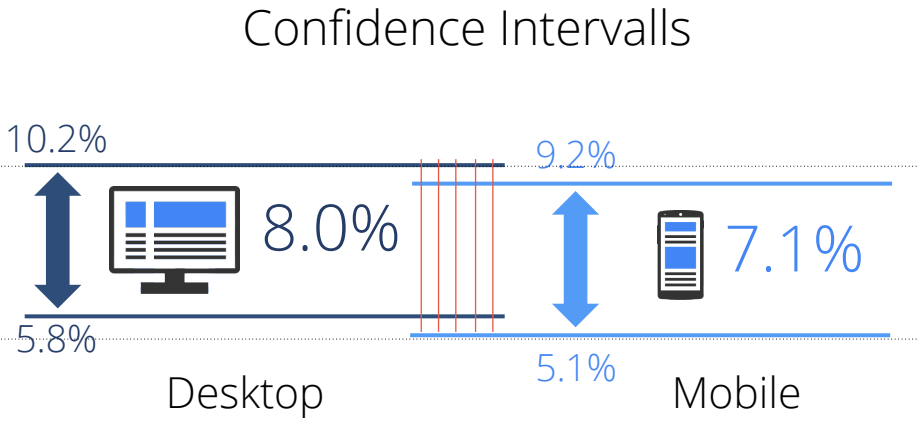
SOURCE: 30 studies on BVOS from 5 countries and 13 industries.
Average number of respondents per study at n = 800 per test cell
All studies conducted by IPSOS or TNS with feld time 2014

Google

Top of mind awareness

On average we saw an uplift on TOM awareness between 7% and 8% points. Both screens perform equally well, differences were not significant.





Confidence Intervalls OVERLAP
=
there is no significant difference between desktop and mobile

SOURCE: 30 studies on BVOS from 5 countries and 13 industries.
Average number of respondents per study at n = 800 per test cell
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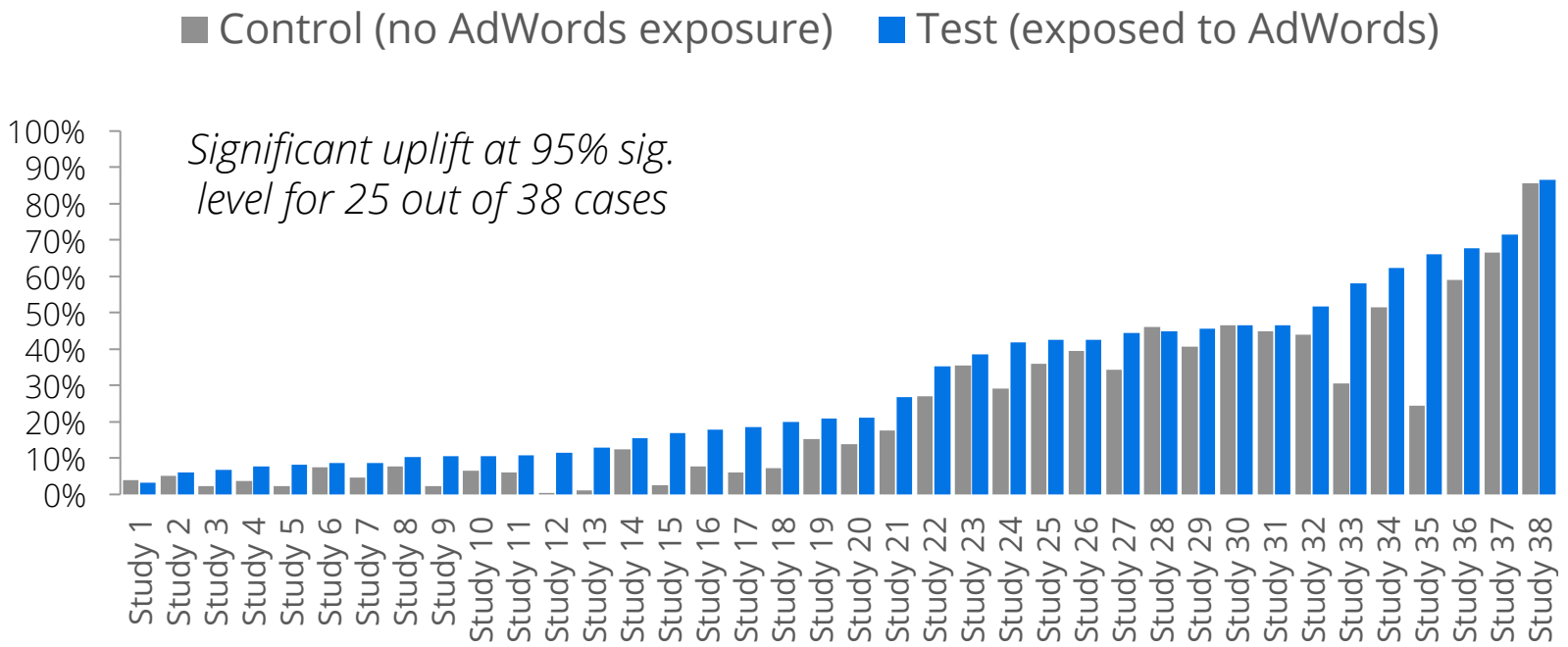
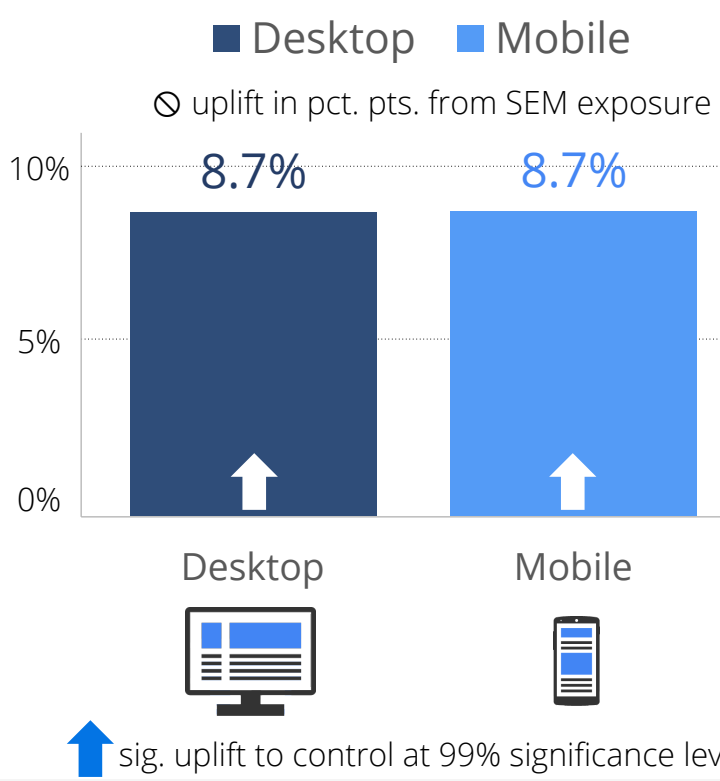
Unaided awareness

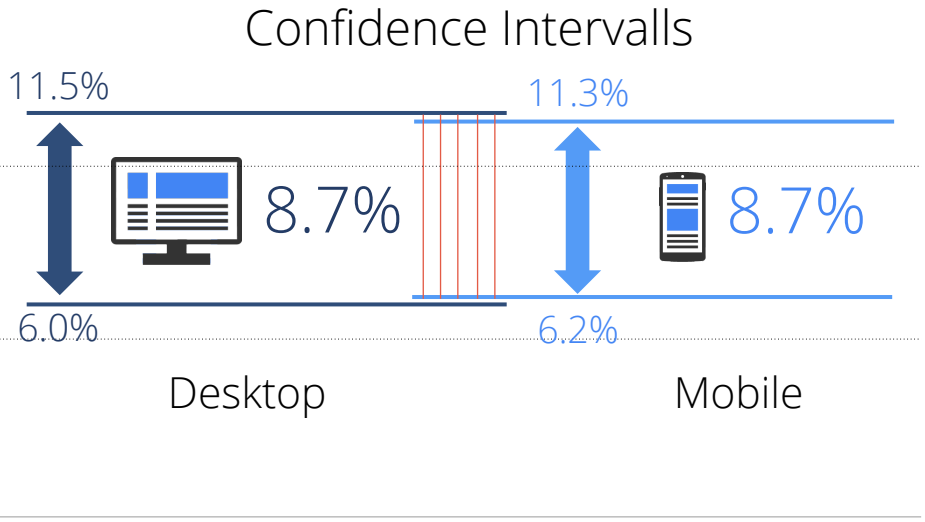
Across 38 case studies we observed on average a positive impact of ad exposure on Google Search on unaided awareness.



Unaided awareness

On average we saw an uplift on unaided awareness of almost 9% points. Both screens perform equally well, differences were not significant.





Confidence Intervalls OVERLAP
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Average number of respondents per study at n = 800 per test cell
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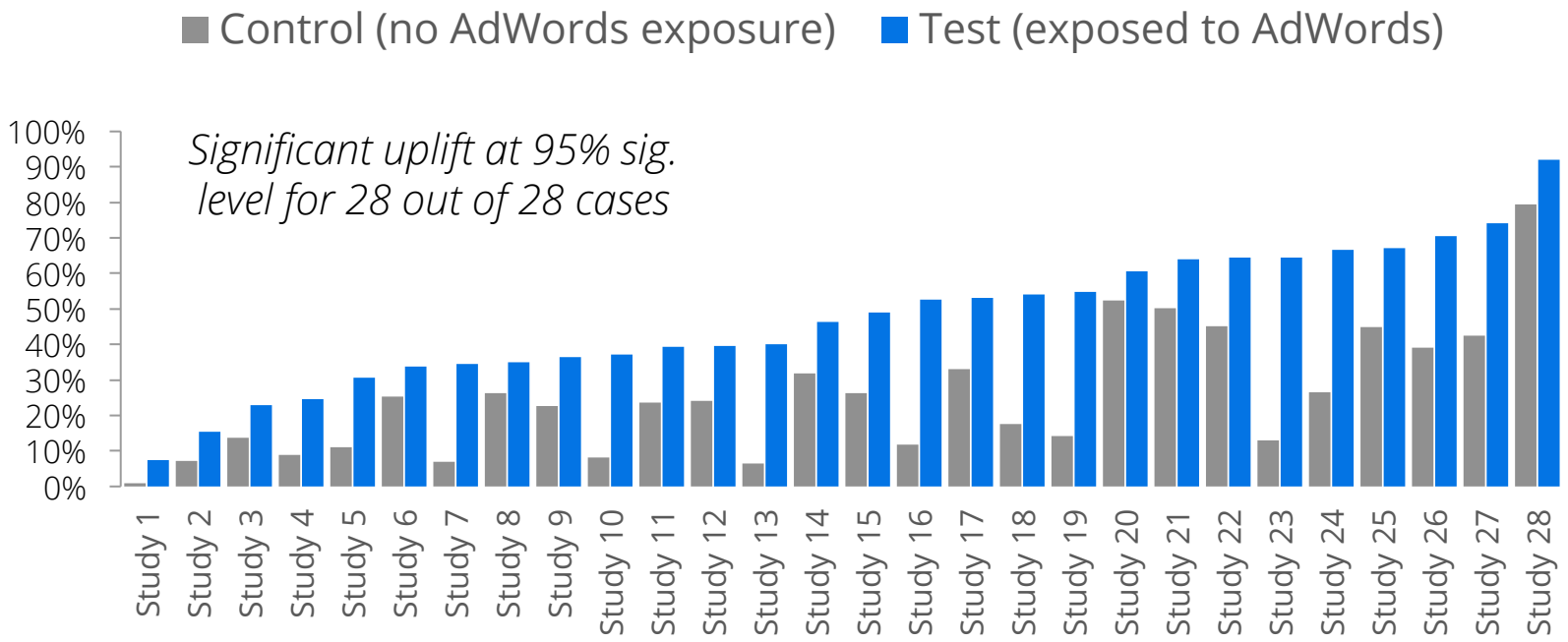
Google

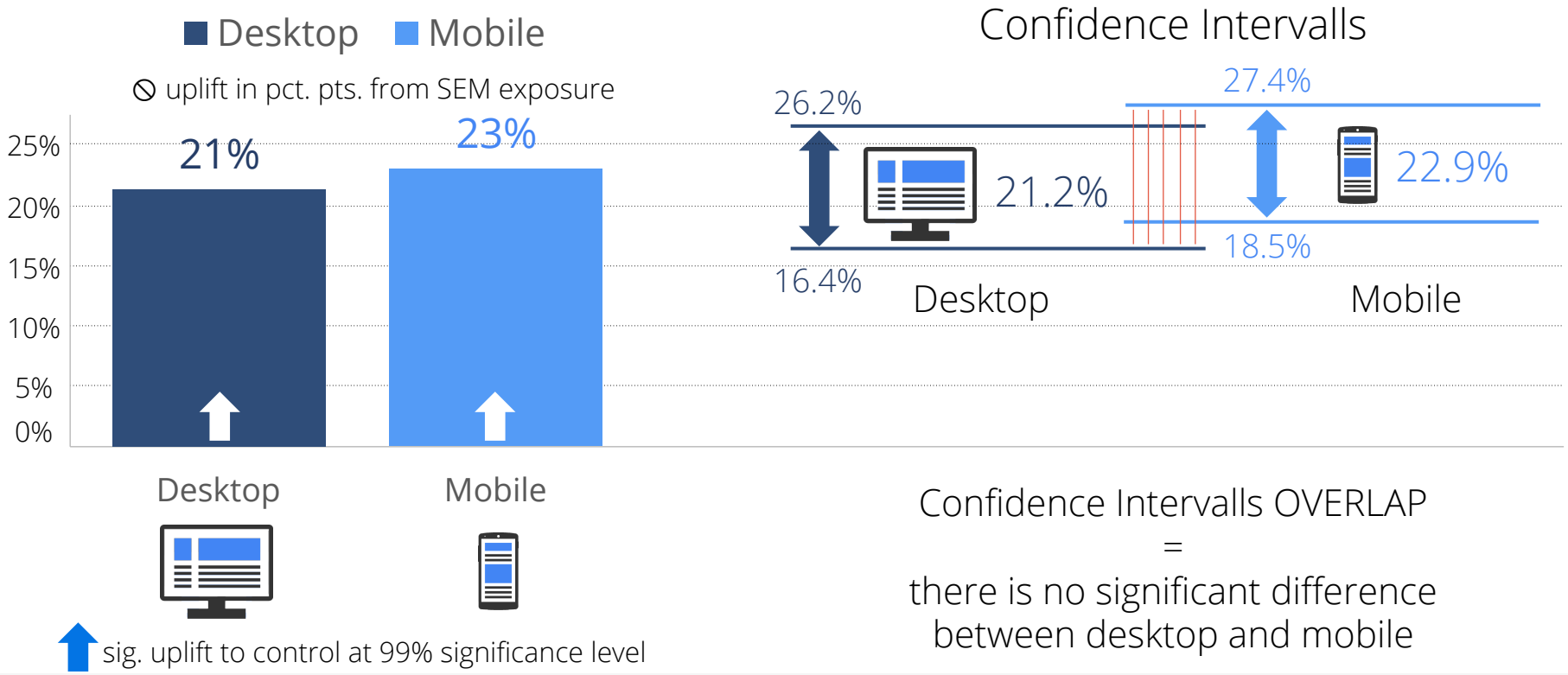
Aided advertising recall

Across all 28 case studies we observed a significant positive impact of ad exposure on Google Search on advertising recall.



Aided advertising recall

On average we saw an uplift on aided ad recall of over 20% points. Both screens perform equally well, differences were not significant.



Confidence Intervalls OVERLAP
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there is no significant difference between desktop and mobile

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Average number of respondents per study at n = 800 per test cell
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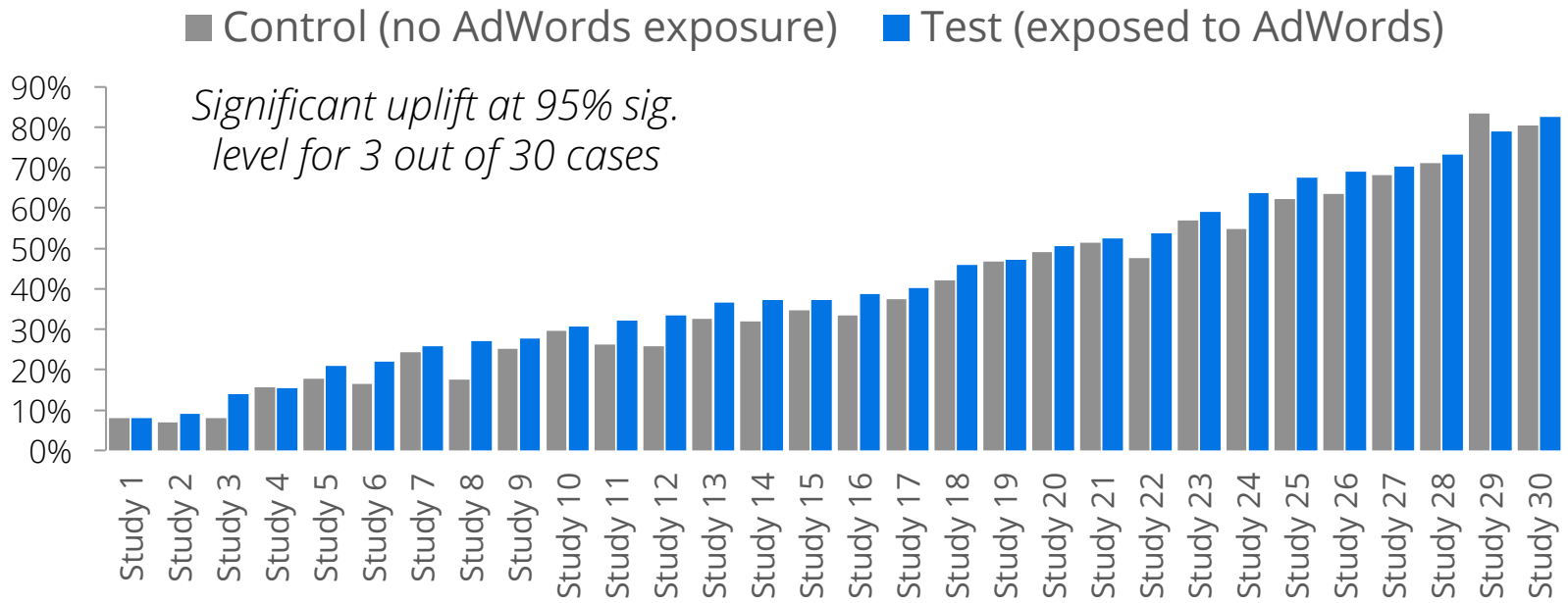
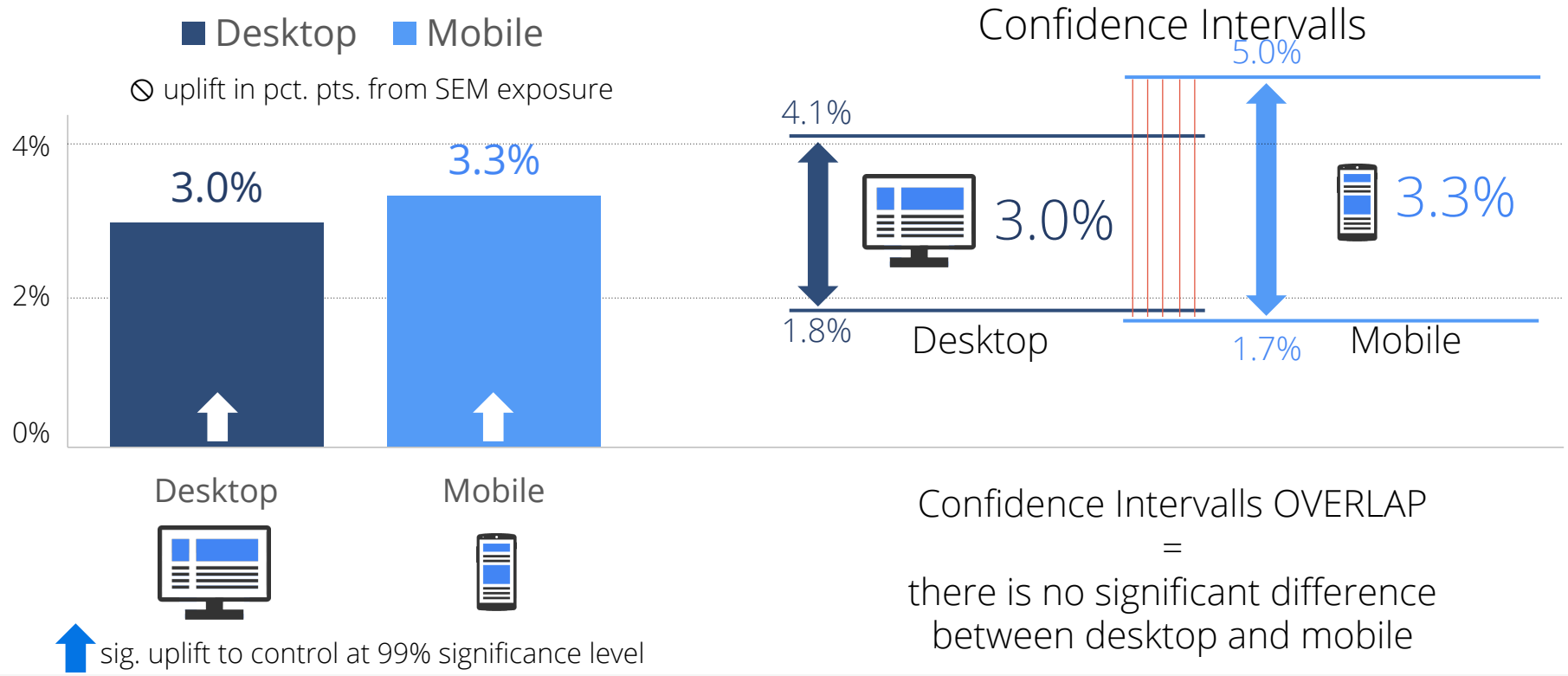
Brand image: “Market Leader”

We observe a positive directional impact of ad exposure on Google Search on brand perception as “being the market leader”. The effects are not statistically significant though in the majority of cases.



Brand image: “Market Leader”

On average we saw an uplift on brand image “market leader” of ± 3% points.
Both screens perform equally well, differences were not significant.



Confidence Intervalls OVERLAP
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there is no significant difference
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Summary

We conducted a meta-analysis on the brand impact of search based on 38 studies from 6 countries and across multiple industries.

Strong significant uplifts on brand metrics along the funnel from brand awareness through ad recall down to brand perception could be observed.

Appendix

Methodology review

On BVOS methodology

The vast majority of studies in this meta-analysis has been conducted by IPSOS following the approach below:

1. Recruit users for the study that are currently “in market”
2. Have them enter a specific keyword in a mock-up Google website
3. Expose them to search ads (or not), depending on which test cell they’re in
4. Have them fill out a survey
5. Compare results from exposed to non-exposed to deduct the impact

While this is an easy and straightforward set-up, it has some weaknesses:

- It’s unrealistic: people are explicitly asked to search for a specific keyword meaning we do not observe natural behaviour
- It’s short term: survey happens immediately after exposure, leading to the question if we truly observe a brand impact or are rather running a memory test.
- It’s artificial: the exposure doesn’t happen on Google, but in a mock-up environment prepared and specifically designed for the test

On BVOS methodology

Being aware of these potential issues, we conducted a series of tests with TNS in Germany using a more sophisticated (but also more expensive) approach:

1. Recruit users for the study that are currently "in market"
2. Have them conduct a general search task, only loosely related to the test brand
3. Two days later, re-approach them with a second (also general) search task
4. Within both search tasks, expose them to search ads (or not), depending on which test cell they're in
5. Roughly one day after the second search task, re-approach them and have them fill out the survey
6. Compare results from exposed to non-exposed to deduct the impact

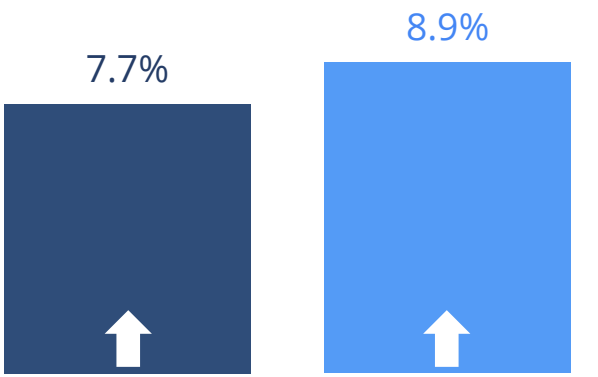
This approach fixes most of the issues:

- Much more realistic: we leave it to people to decide what search terms to use
- Less immediate: the longer pause between exposure and survey considerably softens the "memory test" recency effect
- Not artificial: the exposure happens on the "real" Google website, not a mock-up (ad manipulation was done via a proxy server)

Comparing both approaches

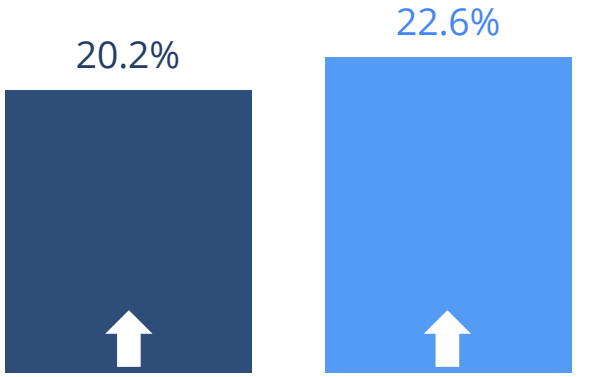
We used the more advanced set-up by TNS as a validation to see if we measure consistent effects with both methods. Results below show, that is the case. Thus we consider the “simpler” approach by IPSOS a valid methodology despite it’s weaknesses.

Unaided brand awareness



⦸ uplift in pct. pts. from SEM exposure

Aided ad recall



⦸ uplift in pct. pts. from SEM exposure

↑ sig. uplift to control at 99% significance level

THANK YOU!

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