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Search Marketing Statistics Compendium

August 2010

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Published

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1. About this report

This is one of 11 reports that make up the Econsultancy Internet Statistics Compendium, a collection of the most recent statistics and market data publicly available on online marketing, e-commerce, the internet and related digital media. The compendium is a **one-stop shop for internet stats** to help you quickly track down the latest data. You can download the full compendium in one file at <http://econsultancy.com/reports/internet-statistics-compendium>

The other reports in the compendium are:

[Affiliate Marketing](#)

[Customer Experience](#)

[Demographics](#)

[E-commerce](#)

[Email Marketing](#)

[Mobile](#)

[Internet Advertising](#)

[Social Media](#)

[Technology Adoption](#)

[Web Analytics](#)

The information contained – including charts and graphs – is taken largely from third party sources, credited throughout the document and in the acknowledgements at the back of this guide.

If there is data that you feel is inaccurate, missing, or incorrectly credited then please get in touch with Econsultancy's Research Director Linus Gregoriadis: linus@econsultancy.com or phone +44 (0)20 7269 1450. Likewise, if you would like to contribute data or research then contact us.

1.1. About Econsultancy

Econsultancy is a [digital publishing and training group](#) that is used by more than 200,000 internet professionals every month.

The company publishes [practical and timesaving research](#) to help marketers make better decisions about the digital environment, build business cases, find the best suppliers, look smart in meetings and accelerate their careers.

Econsultancy has offices in New York and London, and hosts more than [100 events](#) every year in the US and UK. Many of the world's most famous brands use Econsultancy to [educate and train](#) their staff.

Some of Econsultancy's members include: Google, Yahoo, Dell, BBC, BT, Shell, Vodafone, Virgin Atlantic, Barclays, Deloitte, T-Mobile and Estée Lauder.

[Join Econsultancy](#) today to learn what's happening in digital marketing – and what works.

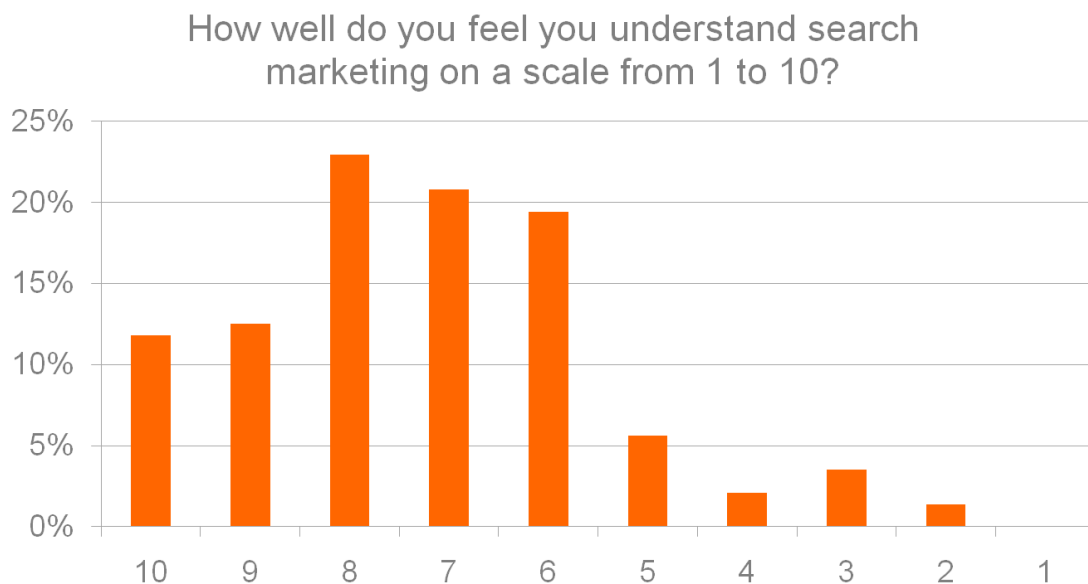
Call us to find out more on +44 (0)20 7269 1450 (London) or +1 212 699 3626 (New York). You can also [contact us online](#).



2. Overall market figures

United Kingdom

- UK internet users now spend 64% more time using search engines (31 million hours per month in April 2010) than they did three years ago. [Source: [UKOM](#), July 2010]
- How well do you feel you [marketers] understand search marketing on a scale from 1 to 10? (1 = no understanding, 10 = complete understanding) [Source: IAB National Search Marketing Barometer 2010, [IAB](#), July 2010]



- Only 28.7% of advertisers said search is fully integrated with the rest of the marketing mix, yet 99% said there is a greater opportunity to integrate and 100% of Search Council agencies felt all of their clients could do more to integrate. [Source: IAB National Search Marketing Barometer 2010, [IAB](#), July 2010]
- 78% said search can build brand either directly or as part of the full user journey. 70% include brand building as a primary objective of SEO and over 50% for PPC. [Source: IAB National Search Marketing Barometer 2010, [IAB](#), July 2010]
- 99% of SEO budgets and 90% of PPC budgets will stay the same or increase in 2010 (55% and 43% increase respectively). [Source: IAB National Search Marketing Barometer 2010, [IAB](#), July 2010]
- Only 37% of websites are 'good' at achieving objectives, leaving much room for improvement once consumers reach their destination. [Source: IAB National Search Marketing Barometer 2010, [IAB](#), July 2010]
- Over half of advertisers don't know who owns their most valuable search asset, the intellectual property. Advertisers must address this immediately. [Source: IAB National Search Marketing Barometer 2010, [IAB](#), July 2010]

- Around half of UK companies (49%) are now spending at least £50,000 a year on paid search marketing, up from 45% last year and 39% in 2008. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]
- There has been a significant decrease in the proportion of responding companies who spend less than £5,000 a year on paid search, from 25% last year to 14%. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]
- 13% of companies are now spending at least £1 million a year on paid search, up from 8% last year. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]
- Companies are still significantly more likely to be increasing their PPC budgets, than they are to be decreasing their budgets. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]
- The proportion of companies planning to increase SEO spending over the next 12 months has jumped significantly this year (from 55% in 2009 to 60%), as has the percentage of firms planning to raise paid search budgets (up from 45% to 52%). [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]
- The proportion of companies spending less than £5,000 annually on SEO has decreased significantly. Only 27% of companies are now spending less than this amount, compared to 41% in 2009. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]

International

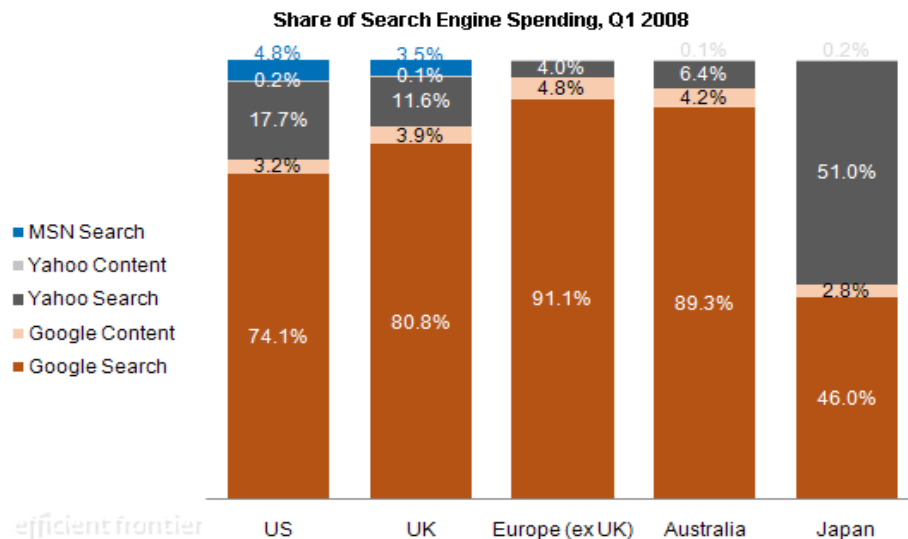
- 35% of online shoppers visited a particular retailer thanks to their visibility on search engines [Source: eCommera, via [Econsultancy blog](#), August 2010]
- Google's image search is now receiving over 1bn page views each day. [Source: [NetImperative](#), July 2010]
 - The search engine now has over 10bn pictures in its archive, which first launched in 2001 with only 250m.
- The global market for SEM market is projected to reach US\$50.68 billion by 2015. [Source: [SEM Global Business Strategy Report](#), Global Industry Analysts, June 2010]
- Search advertising grew by 10.6% year on year across Europe, an impressive performance given the steep declines recorded in other media, but well down on the 26% growth seen in 2008. [Source: [Screen Digest](#), IAB Europe, June 2010]
- During December 2009, the total worldwide search market had more than 131 billion searches conducted by people age 15 or older from home and work locations, representing a 46% increase within 12 months. [Source: comScore, January 2010]
 - This equates to more than:
 - 4bn searches per day
 - 175m per hour
 - 2.9m per minute.

- Top 10 Countries by Number of Searches Conducted [Source: comScore, January 2010]

**Top 10 Countries by Number of Searches Conducted:
December 2009 vs. December 2008 (Total Worldwide, Age 15+ - Home & Work Locations)
Source: comScore**

	Searches (MM)		
	Dec-2008	Dec-2009	Percent Change
<i>Worldwide</i>	89,708	131,354	46%
United States	18,688	22,741	22%
China	11,778	13,278	13%
Japan	6,213	9,170	48%
United Kingdom	4,623	6,245	35%
Germany	4,079	5,609	38%
France	3,362	5,425	61%
South Korea	2,796	4,039	44%
Brazil	2,454	3,763	53%
Canada	2,900	3,710	28%
Russian Federation	1,735	3,333	92%

- Google's revenues from outside of the United States totalled \$3.14bn, representing 53% of total revenues in the third quarter of 2009. [Source: [Google](#), October 2009]
- JP Morgan forecasts that global search query volumes will grow 24% in 2009 [Source: [JP Morgan](#), January 2009]
- Searches of one word length comprise the majority of searches, amounting to 24.32% of all queries. [Source: [Experian Hitwise](#), October 2009]
- Longer search queries, averaging searches of five to more than eight words in length, increased 2% between August and September 2009. Searches of eight or more words increased 6%. [Source: [Experian Hitwise](#), October 2009]
- Google lost 1.4% of its clickshare to Bing (since its launch in June), whilst Yahoo! lost 0.63%. [Source: [Efficient Frontier](#), August 2009]
- Search remains the leading advertising format in Europe with the strongest year-on-year growth rate of 26%, accounting for 43% of online ad expenditure in the 19 countries measured and a value of €5.6bn. [Source: [IAB Europe](#), July 2009]
- The international search market is now larger than the US market, reaching \$15.0bn in 2008. [Source: [JP Morgan](#), January 2009]
- Google grabbed 84.7% of search engine advertising spending in the first quarter of 2008. Yahoo accounted for 11.7%, and MSN 3.6%. [Source: Efficient Frontier, May 2008]



United States

- Share of US searches [Source: [ClickZ](#), July 2010]

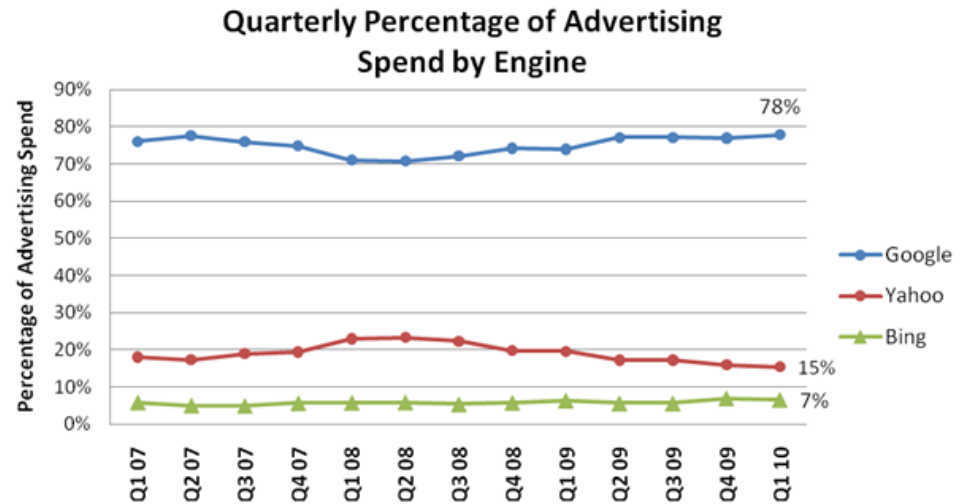
Share of U.S. Searches Among Leading Providers, May 2010 vs. June 2010				
Domain	Share of Searches (%)			
	May 2010	June 2010	Month-over-Month Point Change (%)	
Google Sites	63.7	62.6	-1.1	
Yahoo Sites	18.3	18.9	0.6	
Microsoft Sites	12.1	12.7	0.6	
Ask Network	3.6	3.6	0.0	
AOL Network	2.3	2.2	-0.1	
Note: Data is based on the five major search engines including partner searches and cross-channel searches. Searches for mapping, local directory, and user-generated video sites that are not on the core domain of the five search engines are not included in the core search numbers.				
Source: comScore 2010				

- Americans conducted 15.93 billion core searches in May 2010, a 3% increase from 15.53 billion in April 2010 [Source: [comScore qSearch](#), June 2010]

- Google Sites led the search market with 14.3 billion search queries in March 2010, followed by Yahoo! Sites with 2.7 billion queries and Microsoft Sites with 1.9 billion. Facebook.com experienced significant growth during the month with a 48% increase to 647 million searches, jumping one position in the ranking. [Source: [comScore](#), April 2010]

comScore Expanded Search Query Report March 2010 vs. February 2010 Total U.S. – Home/Work/University Locations Source: comScore qSearch			
Expanded Search Entity	Search Queries (MM)		
	Feb-10	Mar-10	% Change Mar-10 vs.Feb-10
Total Internet	22,271	23,866	7%
Google Sites	13,482	14,252	6%
Google	9,929	10,547	6%
YouTube/All Other	3,553	3,705	4%
Yahoo! Sites	2,509	2,689	7%
Yahoo!	2,496	2,676	7%
All Other	13	13	0%
Microsoft Sites	1,720	1,862	8%
Bing	1,498	1,604	7%
Microsoft/All Other	222	258	16%
Ask Network	689	742	8%
ASK.COM	300	332	11%
MyWebSearch.com/ All Other	389	410	5%
craigslist, inc.	629	664	6%
eBay	624	659	6%
Facebook.com	436	647	48%
AOL LLC	549	594	8%
AOL Search Network	299	319	7%
MapQuest/All Other	250	275	10%
Fox Interactive Media	391	406	4%
MySpace	388	402	4%
All Other	3	4	33%
Amazon Sites	210	226	8%

- US quarterly percentage of advertising spend by search engine [Source: U.S. Search Market Report, [SearchIgnite](#), April 2010]



- US Search Rankings, March 2010 [Source: [comScore](#)]
 - Americans conducted 15.4 billion searches in March, up 7 percent from February. Google Sites accounted for 10.0 billion searches, followed by Yahoo! Sites (2.6 billion), Microsoft Sites (1.8 billion), Ask Network (593 million) and AOL LLC (380 million).

comScore Core Search Report*
March 2010 vs. February 2010
Total U.S. – Home/Work/University Locations
Source: comScore qSearch

Core Search Entity	Search Queries (MM)		
	Feb-10	Mar-10	Percent Change Mar-10 vs. Feb-10
Total Core Search	14,472	15,427	7%
Google Sites	9,475	10,048	6%
Yahoo! Sites	2,433	2,605	7%
Microsoft Sites	1,667	1,802	8%
Ask Network	540	593	10%
AOL LLC	358	380	6%

- Google Sites led the U.S. core search market in March with 65.1% of the searches conducted, followed by Yahoo! Sites (16.9%), and Microsoft Sites (11.7%). Ask Network captured 3.8% of the search market, followed by AOL LLC with 2.5%.

comScore Core Search Report* March 2010 vs. February 2010 Total U.S. – Home/Work/University Locations Source: comScore qSearch			
Core Search Entity	Share of Searches (%)		
	Feb-10	Mar-10	Point Change Mar-10 vs. Feb-10
Total Core Search	100.0%	100.0%	N/A
Google Sites**	65.5%	65.1%	-0.4
Yahoo! Sites	16.8%	16.9%	0.1
Microsoft Sites	11.5%	11.7%	0.2
Ask Network	3.7%	3.8%	0.1
AOL LLC Network	2.5%	2.5%	0.0

- U.S. top search providers [Source: [Nielsen](#), February 2010]

Top 10 Search Providers for January 2010, Ranked by Searches (U.S.)			
Rank	Provider	Searches (000)	Share of Searches
	All Search	10,272,099	100.0%
1	Google Search	6,805,424	66.3%
2	Yahoo! Search	1,488,476	14.5%
3	MSN/Windows Live/Bing Search	1,116,546	10.9%
4	AOL Search	251,762	2.5%
5	Ask.com Search	194,161	1.9%
6	My Web Search	112,356	1.1%
7	Comcast Search	59,608	0.6%
8	Yellow Pages Search	35,101	0.3%
9	NexTag Search	34,736	0.3%
10	BizRate Search	20,123	0.2%
Source: The Nielsen Company			

- Americans conducted 14.7 billion core searches on the top five search engines in December 2009, an increase of 2% over November 2009 [Source: [comScore](#), January 2010]
- 65.7% of searches conducted were on Google, followed by Yahoo (17.3%) and Microsoft (10.7%) [Source: [comScore](#), January 2010]
- Google Sites led the US core search market in September with 64.9% of the searches conducted, followed by Yahoo! Sites (18.8%), and Microsoft Sites (9.4%). Ask Network captured 3.9% of the search market, followed by AOL LLC with 3.0%. [Source: [comScore](#), October 2009]
- Google accounted for 71.08% of all US searches conducted in the four weeks ending Oct. 3, 2009. Yahoo! Search, Bing and Ask.com received 16.38%, 8.96% and 2.56% respectively. [Source: [Experian Hitwise](#), October 2009]

- JP Morgan forecasts that US search query volumes will grow 19% in 2009. [Source: [JP Morgan](#), January 2009]
- Americans conducted 13.8 billion searches in September 2009. [Source: [comScore](#), October 2009]
- The latest search numbers tell us that Google has 70.6% of all US query volume, while the combined Bing and Yahoo! Search now comprise 26% of all US searches, leaving only 3.4% for others. [Source: [Hitwise](#), July 2009]
- An estimated 6.1bn searches were conducted in the US at Google Search in March 2009, giving the internet behemoth a 64.2% share of search queries for the month. Yahoo Search had 1.5bn searches (15.8%) and MSN / Windows Live had 10.3% market share [Source: Nielsen Online via [Marketing Charts](#), April 2009]
- Google led the US search market in October with 63.1% of the searches, up 0.2% from September. [Source: comScore, Dec 2008]

comScore Core Search Report*			
October 2008 vs. September 2008			
Total US – Home/Work/University Locations			
Source: comScore qSearch 2.0			
Core Search Entity	Share of Searches (%)		Point Change Oct-08 vs. Sep-08
	Sep-08	Oct-08	
Total Core Search	100.0	100.0	N/A
Google Sites	62.9	63.1	0.2
Yahoo! Sites	20.2	20.5	0.3
Microsoft Sites	8.5	8.5	0.0
Ask Network	4.3	4.2	-0.1
AOL LLC	4.1	3.7	-0.4

- Google's share of US searches increased from 63.9% in June 2007 to 69.1% in June this year. [Source: Hitwise, July 2008]

- Yahoo's share has dropped from 21.3% to 19.6% over the same period, while MSN has fallen more dramatically, from 9.8% to 5.4%

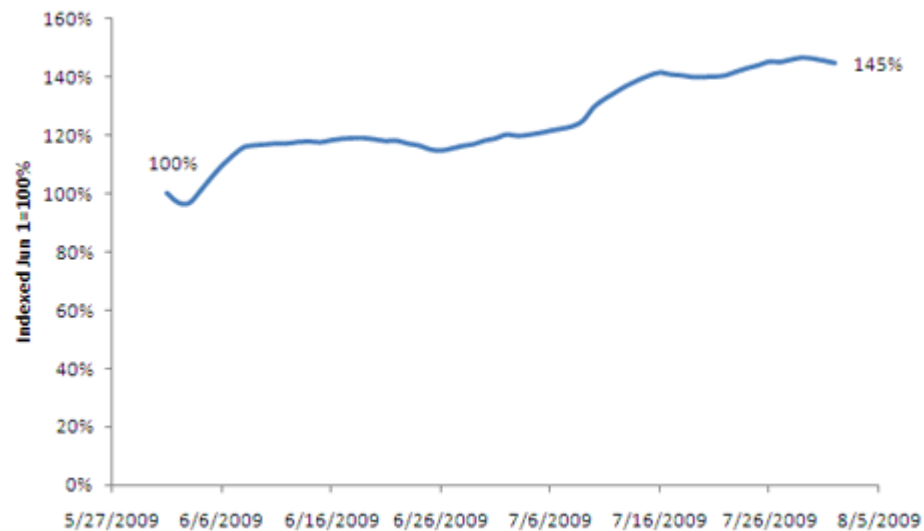
comScore Core Search Report* December 2007 Total US – Home/Work/University Locations Source: comScore qSearch 2.0			
Core Search Entity	Share of Searches (%)		Point Change Dec-07 vs. Nov-07
	Nov-07	Dec-07	
Total Core Search	100.0%	100.0%	0.0
Google Sites	58.6%	58.4%	-0.2
Yahoo! Sites	22.4%	22.9%	0.5
Microsoft Sites	9.8%	9.8%	0.0
Time Warner Network	4.5%	4.6%	0.1
Ask Network	4.6%	4.3%	-0.3

- US search market size estimates, 2004 – 2011. [Source: Metrics 2.0, August 2007]

U.S. Search Market Size Estimates (\$ Billions)									
	2004	2005	2006	2007	2008	2009	2010	2011	
Paid Search		10.0	14.0				33.0		Piper Jaffray
Paid Search	2.6					5.4			JupiterResearch
Search Marketing		5.8	7.2	8.3			11.1		SEMPO
Search Marketing	4.7	6.2	7.9						MarketingSherpa
Local Paid Search			1.0	1.8			4.0		Borrell Associates
Local Search		3.4					13.0		The Kelsey Group
Mobile Search			0.03					1.5	Informa
B2B Vertical Search						1.0			Outsell
Enterprise Search		1.0					2.6		IDC

Metrics 2.0 (www.metrics2.com)

- Efficient Frontier says the total number of clicks performed by users on Bing (in terms of clickshare) increased by 45% since its launch in June. [Source: [Efficient Frontier](#), August 2009]



- Occupying the top of organic and paid search listings can not only pay off in terms of performance marketing – it can also have a big impact on consumers' perception of brands, according to a Google sponsored study from Enquiro Research. [Source: Enquiro via Econsultancy blog, December 2007]
 - Using Honda as the test brand and 'fuel-efficiency' as the test brand attribute, the Google-sponsored study focused on consumers that were at an early stage in the process of selecting and buying a car.
 - It found that when Honda appeared at the top of the paid search and organic rankings, consumers were 16% more likely to think of the manufacturer's cars as fuel efficient than when its brand didn't appear on the page.
 - Participants were also 42% more likely to recall Honda if it was highest in both listings, rather than just top in the organic rankings.

3. News Search

United Kingdom

- Since its launch, Bing News Search site has maintained a market share of around 2% in the UK News Aggregator market. [Source: [Hitwise](#), August 2009]
- News Aggregators in the UK. [Source: [Hitwise](#), August 2009]



- Stats on news aggregators (which also include Google News) show that no newspaper receives more than 4% of traffic from these sites. [Source: [Hitwise via Econsultancy Blog](#), April 2009]
- Google News UK is the most visited news aggregator site, but it doesn't dominate the market. NewsNow receives over a fifth of all visits to the category, while StumbleUpon and Digg each manage over 10%. [Source: [Hitwise](#), October 2008]
- BBC News is currently the second most visited downstream site from the news aggregators after Google UK. [Source: [Hitwise](#), October 2008]

4. Local Search and internet Yellow Pages

International

- Local search sites increased in usage from 11% in 2008 to 12% in 2009. [Source: [TMP Directional Marketing](#), October 2009]
- Nearly two-thirds (63%) of respondents to a TMPDM survey in 2009 stated that they expect their search results to reveal businesses within 15 miles of their homes or places of work. [Source: [TMP Directional Marketing](#), October 2009]
- 30% of consumers who first use internet Yellow Pages still turn to print directories as additional resources in their searches. [Source: [TMP Directional Marketing](#), October 2009]
- 83% of local search users contacted businesses offline, with 46% of consumers making contacts over the phone and 37% visiting the businesses in person. [Source: [TMP Directional Marketing](#), October 2009]
- The percentage of mobile searches with "local intent" will grow from 28% in 2008 to 35% in 2013. [Source: Kelsey Group via [Econsultancy Blog](#), February 2009]
- Approximately 15% of iPhone applications are local. [Source: Kelsey Group via [Econsultancy Blog](#), February 2009]

United States

- The number of people who sought local information on a mobile device grew 51% from March 2008 to March 2009. [Source: [comScore](#), June 2009]
- Methods of accessing Local Mobile Content (Local content defined as searching for information on maps, movies, business directories or restaurants). [Source: [comScore](#), June 2009]

Subscribers Accessing Local Mobile Content* by Access Method Three-Month Average Ending March 2009 vs. March 2008 U.S. Mobile Subscribers Age 13+ Source: comScore Mobile			
	Number of Mobile Subscribers (MM)		
	Mar-08	Mar-09	Percent Change
Any Access Method	21.5	32.5	51%
Browser	15.4	20.7	34%
SMS	6.8	11.7	72%
Application downloaded to phone	6.2	11.3	83%

- Growth in Local Mobile Content by Genre (Local content defined as searching for information on maps, movies, business directories or restaurants). [Source: [comScore](#), June 2009]

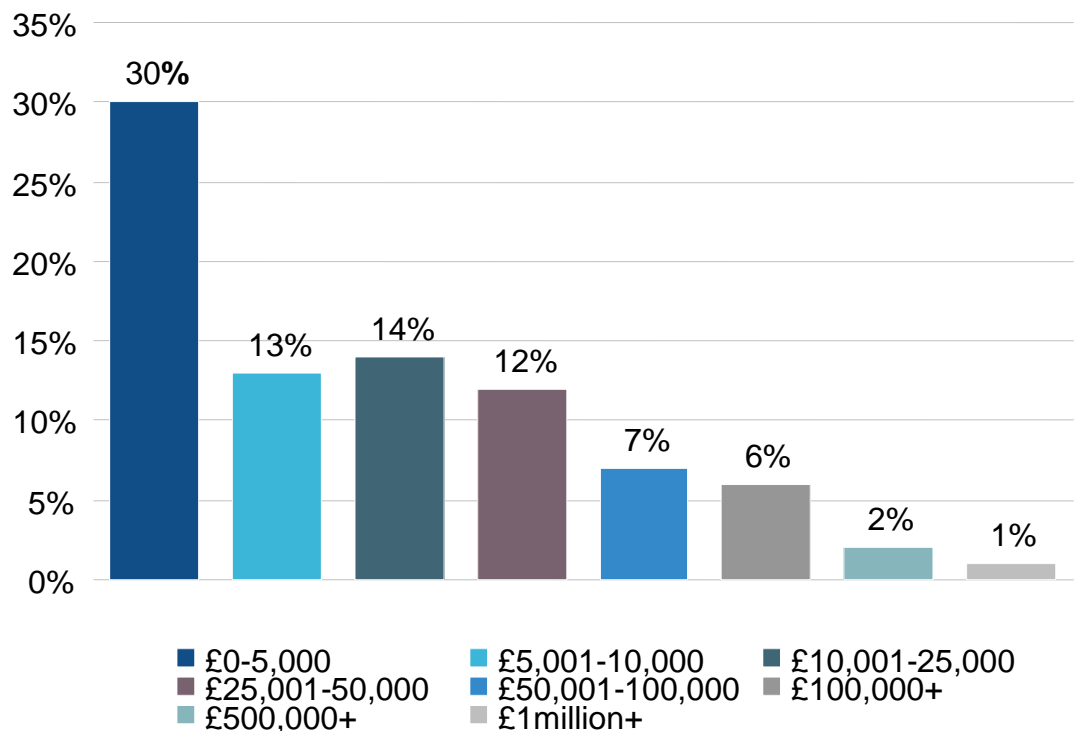
Growth in Local Mobile Content by Genre Three-Month Average Ending March 2009 vs. March 2008 U.S. Mobile Subscribers Age 13+ Source: comScore Mobile	
Local Mobile Content Genre	Y/Y Percent Change
Online Directories	73%
Restaurants	70%
Maps	63%
Movies	60%

5. Natural Search/SEO/Organic search

United Kingdom

- Four out of five online 18- to 24-year-olds prefer and trust natural search results over paid search results [Source: [Tamar Search Attitudes Report](#), Tamar, July 2010]
- Just 4% of consumers would choose paid search results over natural search results when researching a purchase online [Source: [Tamar Search Attitudes Report](#), Tamar, July 2010]
- Just under half of companies (49%) say their return on investment from SEO has increased in the last 12 months, compared to just 4% who say it has decreased. There has been no significant change since last year for natural search. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]
- The changes in SEO barriers to success since last year are not as marked as they are for paid search. *A lack of internal resource* is still, far and away, the biggest problem for companies wanting to be successful at natural search. The proportion of respondents who say this is a major barrier has increased from 44% last year to 49% this year. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]
- The most popular method for tracking return on investment from natural search is the number of *clicks / visitors*, with 72% of marketers citing this metric. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]
- *Generating leads* is the most commonly cited primary objective from SEO, with 34% saying this is their top priority. . [Source: Econsultancy/SEMPO [State of Search Report 2010](#), March 2010]
- Econsultancy estimates that the UK marketplace for search engine optimisation was worth £330m during 2008 and that the market will grow by 14% in 2009 to a value of £376m. [Source: [Econsultancy SEO Agencies Buyer's Guide](#), October 2009]
- Since 2008, there has been a significant 8% increase in the proportion of companies who say they are working on their natural search in-house in conjunction with using an agency. [Source: Econsultancy UK Search Engine Marketing Benchmark Report, April 2009]
 - The proportion of respondents who say they use agencies is still around 50% but only 11% are now completely relying on this outside support without any internal capability.
- 47% of companies spend at least £10,000 per year on search engine optimisation (SEO), 20% spend more than £50,000. [Source: Econsultancy UK Search Engine Marketing Benchmark Report, April 2009]
- 55% of respondents expect to increase their SEO budget this year. Only 6% plan to decrease investment in SEO. [Source: Econsultancy UK Search Engine Marketing Benchmark Report, April 2009]
- 48% of companies report that ROI for SEO has gone up in the last year. Only 6% say there has been a decrease in ROI. [Source: Econsultancy UK Search Engine Marketing Benchmark Report, April 2009]
- 16% of companies surveyed for Econsultancy's 2008 Search Engine Marketing Report are spending at least £50,000 on SEO every year. [Source: Econsultancy / Guava [UK Search Engine Marketing Report 2008](#), April 2008]
- Just under a third of organizations (30%) are spending £5,000 or less annually

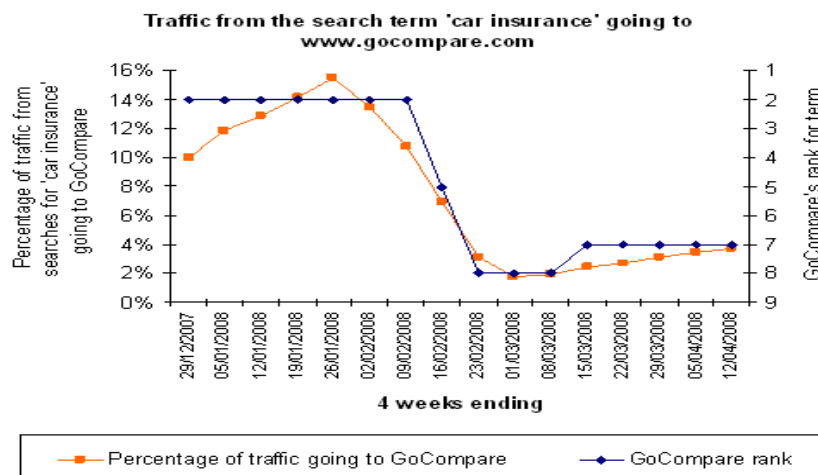
How much do you spend on SEO per year?



- According to an iProspect survey, seven out of ten respondents said they clicked a search result within the first page of results, while 92% clicked a result within the first three pages of search results. [Source: iProspect via eMarketer, April 2008]
 - Only 8% of users ventured beyond the third page of results.
 - Over 90% of respondents changed the search term if they did not find what they wanted in the first three pages of search results.

Effects of Google penalties

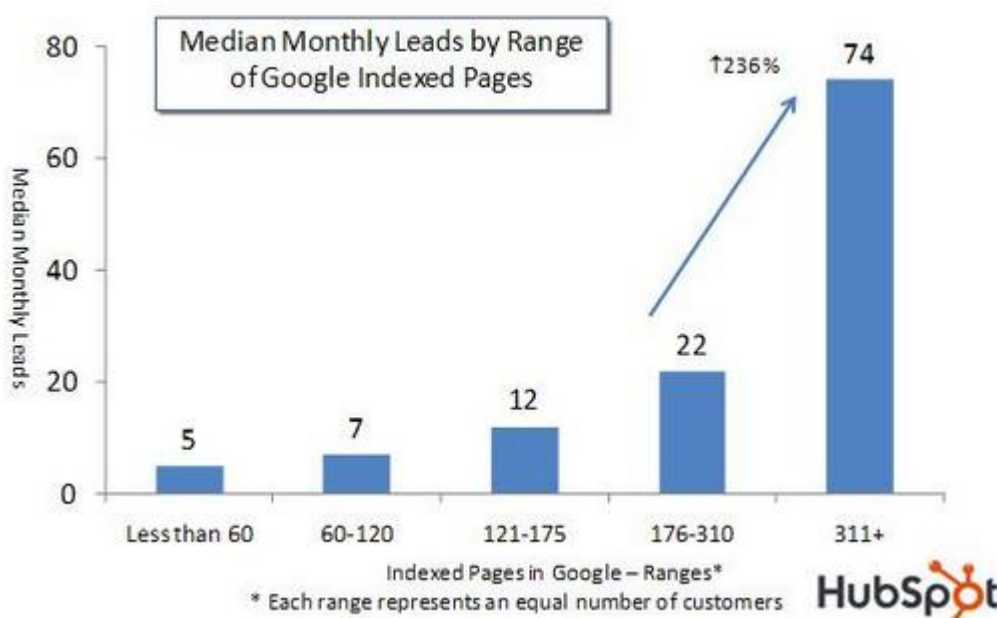
- Gocompare was penalised by Google for boosting its ranking by buying paid links. The company had a search term traffic share of 16% when it ranked number 1 for "car insurance" but that dropped to 2% during the penalty and is still less than 5%, even though it is ranking in the top 10. [Source: Hitwise [via Econsultancy blog](#), April 2008]



- An eye-tracking study by Dutch market research firm De Vos & Jansen found that people who search with a view to buying looked at more results than those who merely searched for information. [Source: De Vos & Jansen, February 2007]
 - Organic results were viewed most often – 98% viewed these results, while 95% looked at the sponsored results at the top, and only 31% the sponsored results on the right of the page.
 - On average, 9.2 search results were viewed before the first click. The average number of organic results viewed was 6.6. Of the sponsored links, 2.6 views was the average for those on the top of the page, and 0.6 for those on the right.
 - On average, consumers spent 10.4 seconds on a page to view the search results. Organic results were viewed 8.8 seconds on average. The sponsored results at the top and on the right attracted less attention, and were viewed for 2 and 0.2 seconds respectively.
 - The average viewing time for a search result was 1.1 seconds. For organic results this was 1.3 seconds, for sponsored result at the top this was 0.8 seconds, dropping to 0.2 seconds for those on the right.
 - Searchers looking to carry out a transaction viewed more results, 9.9 on average, compared with 8.5 for information seekers.
 - Buyers also spent more time viewing results, 11.4 seconds compared with 9.4 seconds for searchers.

International

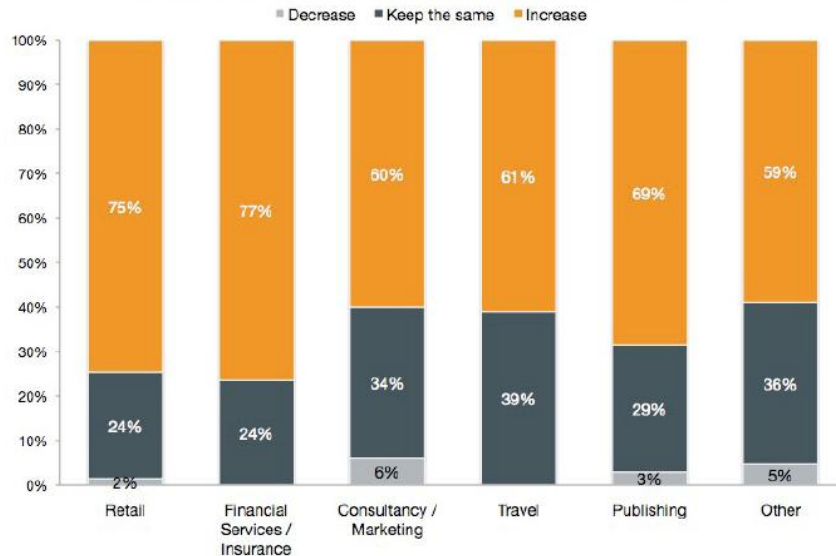
- An incremental increase of 50-100 pages indexed by Google can cause lead growth in double-digit percentages. For example, going from 60-120 indexed pages to 121-175 indexed pages can increase a company's median leads from seven to 12, creating 58.3% growth. [Source: Google Page Indexing Creates Leads, [Hubspot](#), April 2010]
 - The most significant improvement in median lead growth comes when a company increases its indexed pages from the 176-310 range to the 311-plus range. Median leads skyrocket from 22 to 74, representing triple-digit 236% growth. After exceeding the 311 indexed pages mark, median lead growth subsides.



- Budget changes 2010: SEO [Source: [ExactTarget/Econsultancy](#) supplemental survey data: Marketing Budgets 2010: Effectiveness, Measurement and Allocation, February 2010]

BUDGET CHANGES 2010: SEARCH ENGINE OPTIMIZATION

Search Engine Optimization: "Is your company planning to spend more or less budget in 2010?"



Source: Econsultancy and ExactTarget. Marketing Budgets 2010: Effectiveness, Measurement and Allocation Survey, January 2010.

ExactTarget



www.ExactTarget.com

- 64% of organisations are planning to increase their SEO budgets during 2010. [Source: [Econsultancy/ExactTarget Marketing Budgets 2010](#), February 2010]
- Eric Enge, President of Stone Temple Consulting says that image search makes up about 5.7% of all Google searches, and estimates that "up to 15% of all search is image related". [Source: [WebProNews](#), August 2009]
- Nearly 15bn links (~3% of all links indexed from the live web by the SEOmoz Linkscape tool) use the nofollow attribute. Over 11bn of those links were internal (73% of instances of nofollow) [Source: [SEOmoz](#), June 2009]
- Microsoft says that Flash-based sites are responsible for 21% of all empty descriptions in their index. [Source: Microsoft via [Search Engine Land](#), June 2009]
- According to a study from JupiterResearch for Yahoo, 68% of people try another search if they can't find what they want on the first page of search results. [Source: Yahoo, iProspect, and JupiterResearch, June 2008]

When search engine users were asked “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?” they responded as follows:

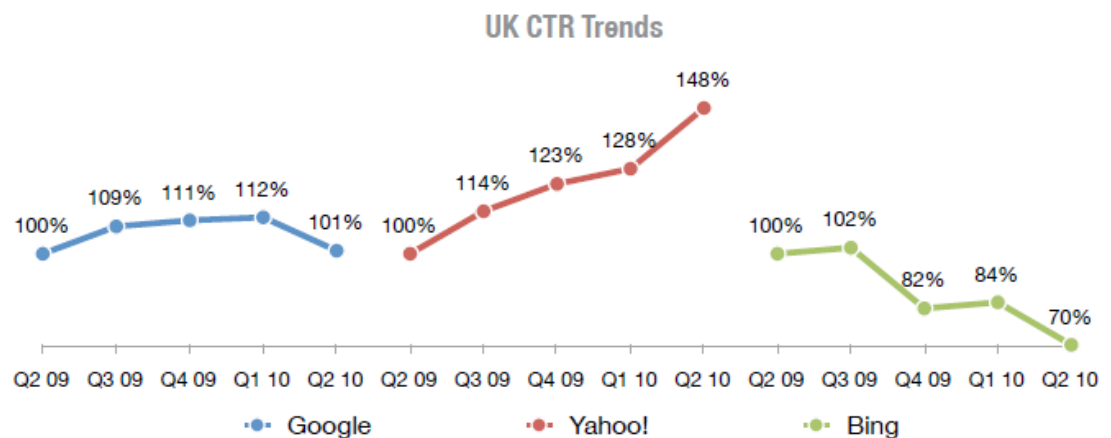
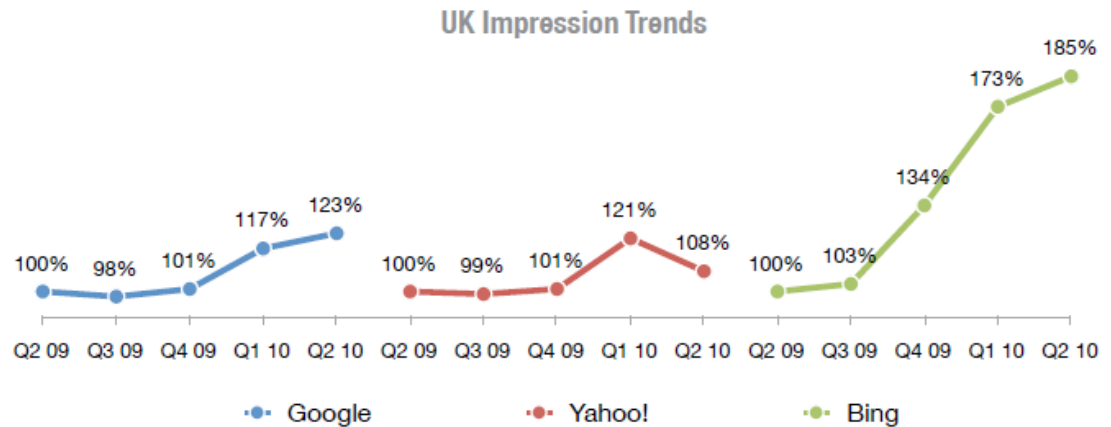
	2008	2006	2004	2002
Only a few	27%	23%	24%	16%
The first page	41%	39%	36%	32%
The first 2 pages	17%	19%	20%	23%
The first 3 pages	7%	9%	8%	10%
More than 3 pages	8%	10%	12%	19%

- 91% prefer using natural search results when looking to buy a product or service online, according to Tamar’s 2008 Search Attitudes Report. [Source: Tamar, May 2008]
 - 31% of consumers said they chose natural over paid search results as they trust their search engine to give them the most relevant results.
 - 51% start with a search engine when looking to purchase from a retailer online and 42% start with a search engine when looking to make a travel purchase.
 - Women favour search engines more when it comes to retail purchases with 54% preferring to begin with a search engine in comparison with 46% of men.
- According to an iProspect survey, seven out of ten respondents said they clicked a search result within the first page of results, while 92% clicked a result within the first three pages of search results. [Source: iProspect via eMarketer, April 2008]
 - Only 8% of users ventured beyond the third page of results.
 - Over 90% of respondents changed the search term if they did not find what they wanted in the first three pages of search results.

6. Paid Search / Pay per click (PPC)

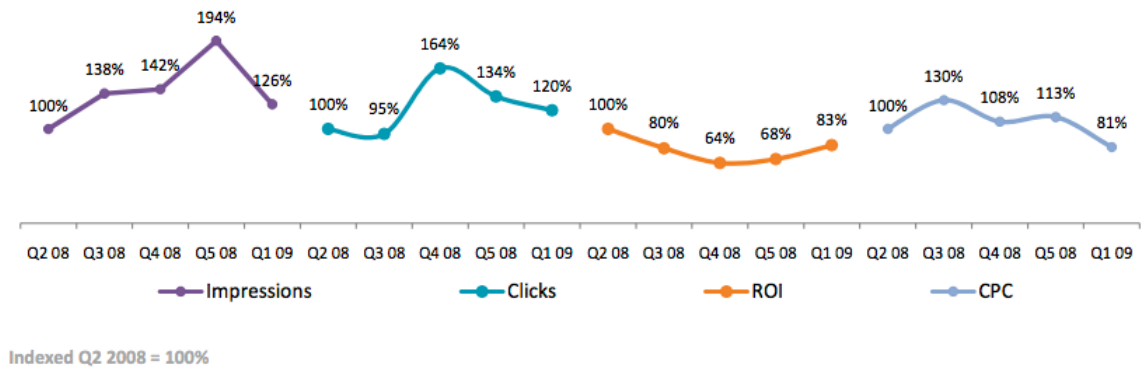
United Kingdom

- Paid Ad impressions are on the rise, CTRs are mixed [Source: UK Search Engine Performance Report Q2, [Efficient Frontier](#), July 2010]



- The higher cost of clicks continues to have the biggest negative impact on paid search ROI, with 46% of companies and 51% of agencies indicating that this affects performance. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]
- More than two thirds (69%) of search advertisers using Google say that prices for the keywords they routinely bid on have gone up in the last year. An even higher proportion of agencies (71%) say this is the case. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]
- 39% of companies say that ROI from Google paid search is now better than a year ago, compared to 34% who say it is the same and 27% who say it has gone down. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]
- For Microsoft, a similar percentage of companies (37% compared to 39% for Google) say that ROI is now better than a year ago. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]
- Half of companies (51%) using Bing say they have increased this budget, compared to 60% for Google and 31% for Yahoo. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]

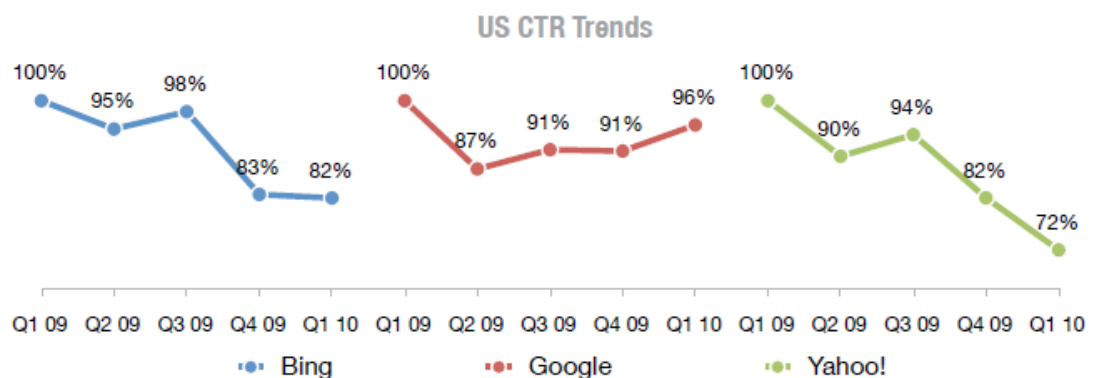
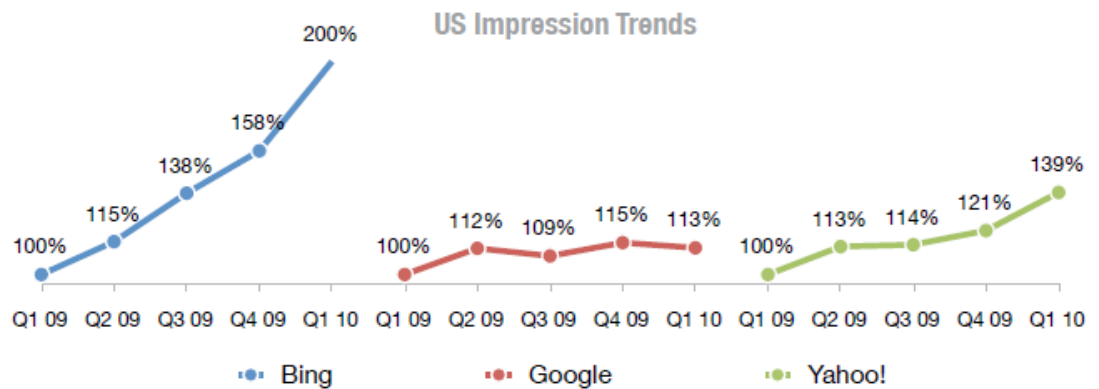
- Lack of internal resource has become a much more significant issue for those carrying out paid search marketing over the past year, with 41% now saying this is one of their three biggest barriers to successful PPC activity, compared to 29% last year. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]
- Less than half of companies (45%) carrying out paid search marketing are using a third party bid management technology for their PPC activity. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]
- A third of companies (32%) rely on bid management tools provided by search engines, while a further 23% say they don't use any technology for their paid search marketing. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]
 - Just under a third of agency respondents (31%) say they only use tools provided by search engines and a quarter (24%) don't use any tool. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]
- The majority of company respondents (59%) say their paid search analytics attribute 100% of the value of the conversion to the last click. [Source: Econsultancy / Guava [UK Search Engine Marketing Benchmark Report 2010](#), June 2010]
- On average, companies expect to spend 37% more on paid search in 2010 than they did in 2009 (38% for North America). This is a substantial increase on the equivalent 22% average increase expected for 2009. [Source: Econsultancy/SEMPO [State of Search Report 2010](#), March 2010]
- Half of companies (50%) surveyed expect to spend more on paid search in 2010 compared to 2009, compared to 16% who say they will spend less. [Source: Econsultancy/SEMPO [State of Search Report 2010](#), March 2010]
- More than half of companies (55%) have observed an increase in keyword costs in the last 12 months, compared to only 13% who say costs have gone down. [Source: Econsultancy/SEMPO [State of Search Report 2010](#), March 2010]
- The majority of companies (53%) carrying out search engine marketing are not using a third-party bid management technology for paid search marketing, relying instead on search engine tools and Excel. [Source: Econsultancy/SEMPO [State of Search Report 2010](#), March 2010]
- Paid-for listings maintained its position as the largest single format with a 60.7% share of the market. £2,148m was spent on search in 2009. [Source: Internet Advertising Bureau Fact Sheet, [IAB](#), March 2010]
- Econsultancy estimates that the UK paid search marketplace will grow by 12% in 2009 to a value of £2.71bn. [Source: [Econsultancy Search Engine Marketing Trends Briefing](#), November 2009]
- For paid search, 43% report that return on investment (ROI) has increased compared to 15% who say that it has decreased. [Source: [Econsultancy UK Search Engine Marketing Benchmark Report](#), April 2009]
- Paid-for search continued to grow in the UK, with an 11.8% increase from H1 2008 to H1 2009. [Source: [Internet Advertising Bureau](#), October 2009]
- The UK paid search marketplace was worth £2.42bn during 2008 [Source: [Econsultancy Paid Search Buyers Guide](#), 2009]
- Paid clicks - which include clicks related to ads served on Google sites and the sites of AdSense partners - were 15% higher year-on-year, but 2% less than in the first quarter of 2009. [Source: [BBC](#), July 2009]
- Cost per clicks (CPCs) have fallen dramatically year on year with the biggest fall seen from Google. CPCs across all engines decreased by 20-31% year-on-year (YoY). [Source: [Efficient Frontier](#), July 2009]



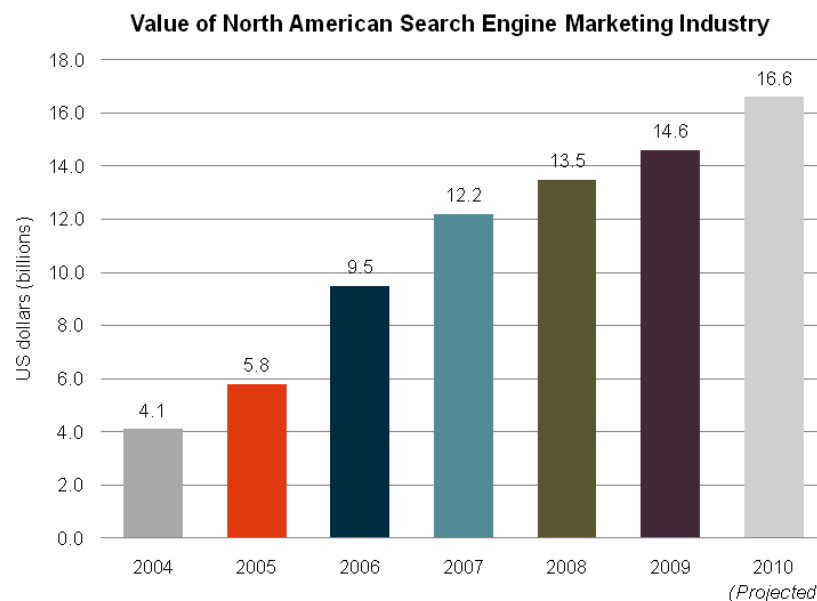
- Paid-for search advertising grew by 22.7% in 2008 to £1986.9 millions, a 59.3% share of all online advertising in the UK. [Source: [IAB](#), April 2009]
- 43% of companies say that ROI for paid search has increased this year, 15% say it decreased. [Source: Econsultancy UK Search Engine Marketing Benchmark Report, April 2009]
- 45% of survey respondents plan to increase their Paid Search budget, just 11% plan to decrease spending. [Source: Econsultancy UK Search Engine Marketing Benchmark Report, April 2009]
- 85% of companies use Google for paid search. 44% use Yahoo, 30% use Live.com. [Source: Econsultancy UK Search Engine Marketing Benchmark Report, April 2009]
- 94% of surveyed agencies say their clients advertise with Google. [Source: Econsultancy UK Search Engine Marketing Benchmark Report, April 2009]
- The number of companies advertising with Yahoo has decreased by 5%. [Source: Econsultancy UK Search Engine Marketing Benchmark Report, April 2009]
- 32% of companies spend at least £100,000 per year on PPC advertising. [Source: Econsultancy UK Search Engine Marketing Benchmark Report, April 2009]
- The number of agencies that are purely involved in PPC has nearly doubled, up from 12% to 22% this year. [Source: Econsultancy UK Search Engine Marketing Benchmark Report, April 2009]
- 15% of responding companies said the change in Google's trademark bidding policy has negatively affected ROI from paid search. [Source: Econsultancy UK Search Engine Marketing Benchmark Report, April 2009]

United States

- Paid Ad impressions are on the rise, CTRs are mixed [Source: US Search engine performance report Q2, [Efficient Frontier](#), July 2010]

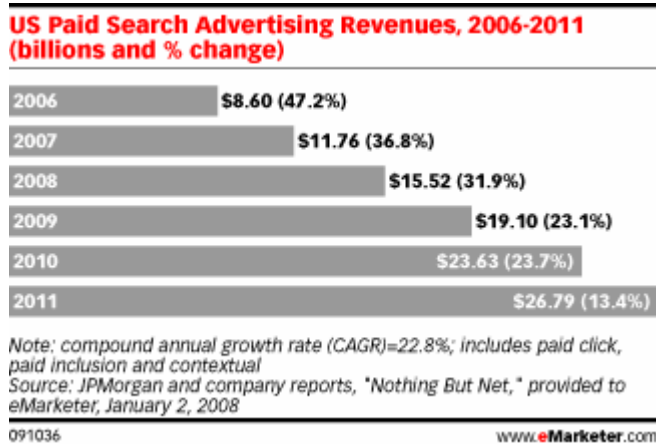


- SEMPO and Econsultancy estimate that the North American search engine marketing industry¹ was worth \$14.6B in 2009, up from \$13.5B in 2008 and based on 8% year-on-year growth. [Source: Econsultancy/SEMPO [State of Search Report 2010](#), March 2010]

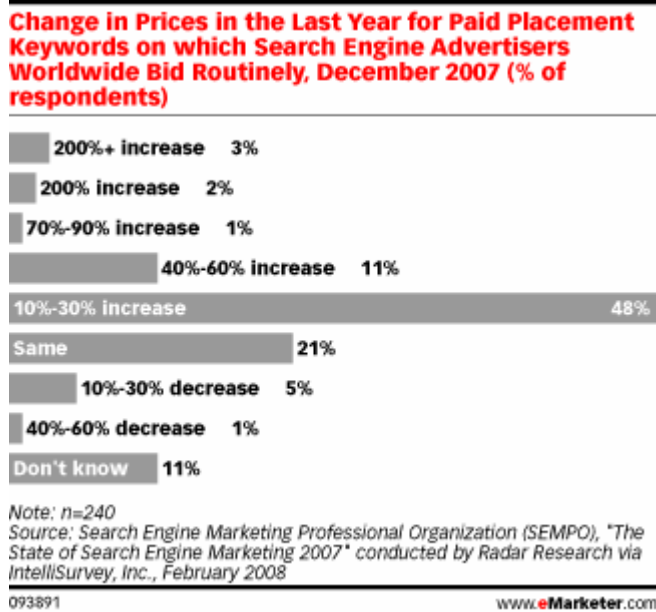


¹ This valuation includes money spent on paid search marketing and search engine optimization (natural search), and also spending on search engine marketing technology. It excludes social media marketing spending.

- Over 80% of Google's United States ad revenue comes from the top 1.35% of advertisers, according to a study of keyword data by SEM Rush. [Source: [SEM Rush via SEObook](#), May 2009]
- US paid search spend was flat year-over-year, yet up 10% quarter-over-quarter on a sequential quarterly basis. [Source: SearchIgnite, October 2009]
- Multichannel retailers increased US paid search spend by 40% in Q3 2009 compared with Q3 2008. [Source: SearchIgnite, October 2009]
- Microsoft's Bing showed the most pronounced growth in US paid search spend in Q3 2009, up 15% year-on-year. [Source: SearchIgnite, October 2009]
- US paid search spend on Yahoo was down -24% year-on-year in Q3 2009. [Source: [SearchIgnite](#), October 2009]
- While referrals to websites from search engines is increasing, the share of paid clicks from that traffic declined by 26% over the last 12 months. In the four weeks to May 9, 2009, 7.25% of search engine traffic to websites was from paid clicks. This compares to 9.84% in the same four week period in 2008. [Source: [Hitwise](#), May 2009]
- Search advertising was up 10.5% in 2008 over 2007. [Source: IAB via [Econsultancy Blog](#), March 2009]
- JP Morgan predicts that growth in US paid search ad revenue will fall to 31.9% in 2008, down from 36.8% in 2007. [Source: JP Morgan via eMarketer, December 2007]

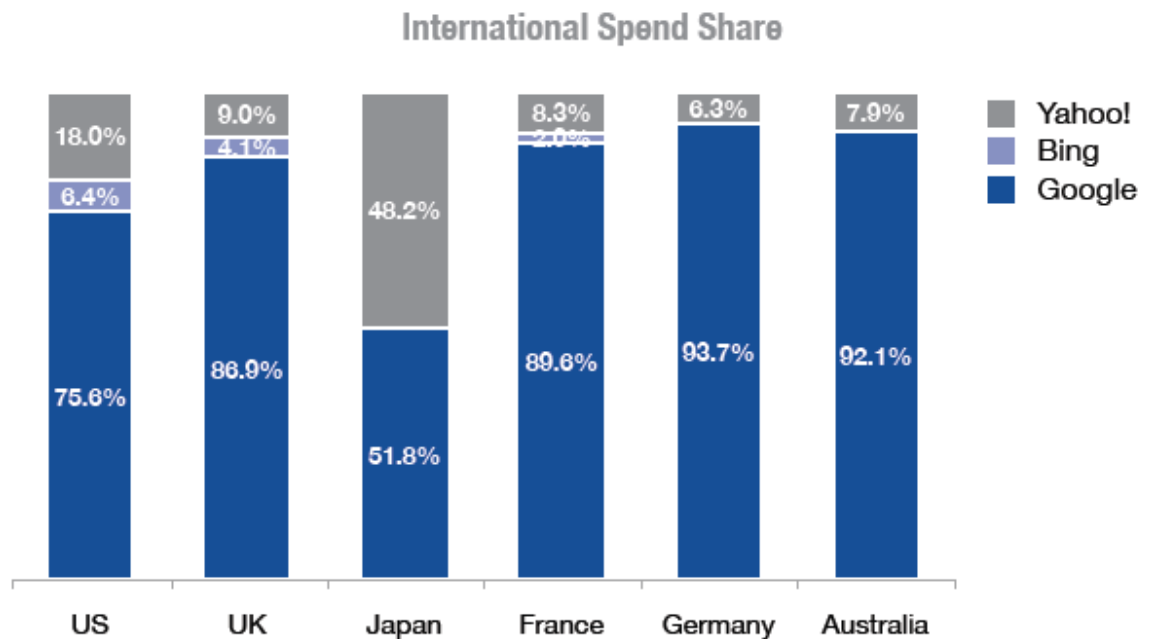


- Keyword inflation: [Source: SEMPO, via eMarketer, April 2008]



International

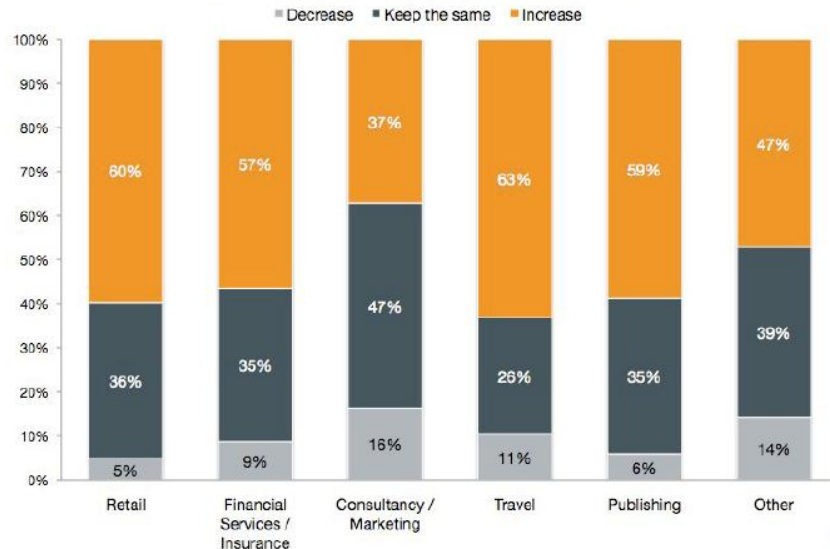
- International spend share [Source: UK Search Engine Performance Report Q2, [Efficient Frontier](#), July 2010]



- Budget changes 2010: Paid Search [Source: [ExactTarget/Econsultancy](#) supplemental survey data: Marketing Budgets 2010: Effectiveness, Measurement and Allocation, February 2010]

BUDGET CHANGES 2010: PAID SEARCH (PPC)

Paid Search (PPC): "Is your company planning to spend more or less budget in 2010?"



Source: Econsultancy and ExactTarget, Marketing Budgets 2010: Effectiveness, Measurement and Allocation Survey, January 2010.

ExactTarget



www.ExactTarget.com

- 51% of organisations are planning to increase their PPC budgets during 2010. [Source: [Econsultancy/ExactTarget Marketing Budgets 2010](#), February 2010]
- Paid search is the best digital marketing channel for being able to measure ROI, with 54% of organisations indicating that they are "good" at measuring ROI for pay-per-click (PPC) search activity. [Source: [Econsultancy/ExactTarget Marketing Budgets 2010](#), February 2010]
- JP Morgan forecasts that global paid search revenues will grow 12% in 2009. [Source: [JP Morgan](#), January 2009]
- There has been a significant 12% drop in the proportion of companies using paid search for generating consumer leads, from 71% (in both 2008 and 2007) to 59% in 2009. [Source: [Econsultancy / Clash-Media Online Lead Generation B2C Report](#) 2009]
- According to a study conducted by search marketing firm Engine Ready, visitors coming to an online retailer's website from a paid search ad are 50% more likely to make a purchase than visitors coming from an organic search result. [Source: [Engine Ready via Econsultancy Blog](#), August 2009]
- Bing expanded its share of paid clicks for the two weeks post launch. Bing's share of paid clicks is up 13% for the second week post launch as compared to pre-launch. It also represents an incremental 5% lift over the first week. [Source: [Efficient Frontier](#), June 2009]

7. Search Conversion Rates

United Kingdom

- 37% of respondents said that the credit crunch was an issue, and almost the same number (34%) said that lower conversion rates were impacting paid search ROI. [Source: Econsultancy UK Search Engine Marketing Benchmark Report, April 2009]

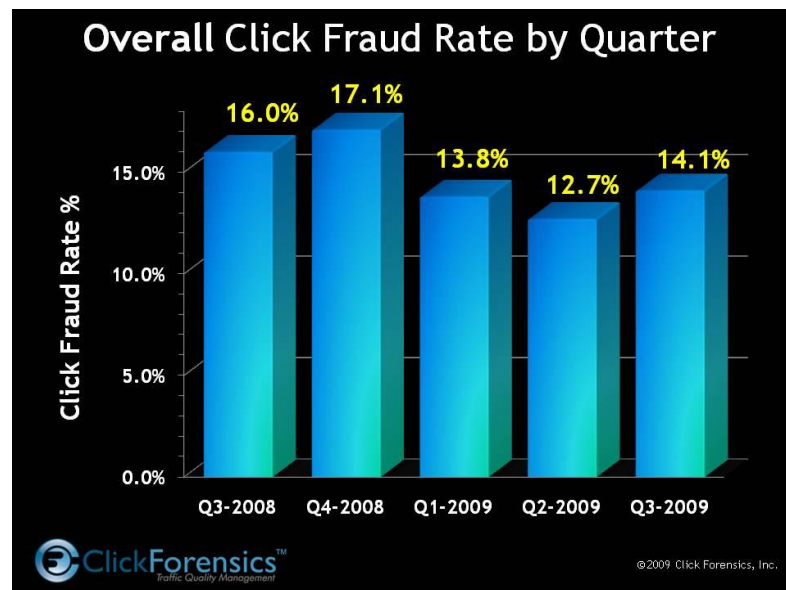
International

- Overall conversion rate from paid search was 2.03% compared to 1.26% from organic search. The study also found that paid search visitors purchased, on average, more than their organic counterparts. [Source: [Engine Ready via Econsultancy Blog](#), August 2009]
- A Penn State study of 1.5m search queries found that 80% of searches can be classified as informational, 10% transactional, and 10% are navigational. [Source: Penn State via Search Engine Land, March 2008]
- A study of traffic and conversion data from 20 business-to-consumer e-commerce sites during the first eight months of 2006 found that Paid search had a median order conversion rate of 3.4% compared to organic search results which produced a conversion rate of 3.13%. [WebSideStory (via ClickZ News), September 2006]
 - The data set included more than 57 million search engine visits.
- More than 60% of e-commerce websites are wasting investment in search because they are not backing their marketing up with content or landing pages to create visitor engagement. [Logan Tod, May 2006]
- Search engines have more than twice the e-commerce conversion rate of other traffic acquisition sources. During the last three months of 2005, the search engine conversion rate at business-to-consumer e-commerce web sites was 2.30%, more than twice the conversion rate of other acquisition sources (0.96%), which include banner ads, affiliate marketing links, shopping search engines and other referring links. [WebSideStory, January 2006]
 - Conversion rate for direct navigation (typing in URL, bookmarked) was 4.23%
- Searchers tend to click generic, non-brand terms earlier in the search process, and more on brand terms when they are closer to making a purchase. This suggests that search marketers can leverage non-brand search terms to drive searchers toward brand terms later in the searching and purchase consideration process. [Chris Sherman, SearchEngineWatch.com, May 2006]
 - Research has shown that the highest conversion rate (9.30%) occurred when a user's first and last click were both on brand terms. However, when the first click was on a non-brand term and the last click was on a brand term, the conversion rate was almost as high (8.73%). [360i and SearchIgnite, May, 2006]
 - For searchers who began their search process on a non-brand term and then switched to a brand term, conversion rates were seven times higher than when a searcher used only non-brand terms. [360i and SearchIgnite, May, 2006]

8. Click fraud

International

- Click fraud trends. [Source: [Click Forensics](#), October 2009]



- The overall industry average click fraud rate was 14.1%, up from 12.7% for Q2 2009 and down from 16.0% in Q3 2008. [Source: [Click Forensics](#), October 2009]
 - In Q3 2009, the countries outside North America producing the greatest volume of click fraud were the United Kingdom, Vietnam and Germany, respectively.
- Botnets accounted for 42.6% of all click fraud in Q3 2009, up from the 27.5% reported for the same quarter last year. [Source: [Click Forensics](#), October 2009]
- The overall industry average click fraud rate was 13.8% for Q1 2009, down from 17.1% reported for Q4 2008 and from the 16.3% rate reported for Q1 2008. But click fraud traffic from malicious scripted programs increased in Q1 2009. [Source: [ClickForensics](#), April 2009]
 - In Q1 2009, the greatest percentage of click fraud originating from countries outside the US came from Canada, United Kingdom and Germany.
- The overall industry average click fraud rate rose to 16.6% for Q4 2007. That's up from the 14.2% click fraud rate for the same quarter in 2006, and 16.2% for Q3 2007. [Source: Click Forensics, Feb 2008]
 - The average click fraud rate of PPC advertisements appearing on search engine content networks, including Google AdSense and the Yahoo Publisher Network, was 28.3% in Q4 2007
- The overall industry average click fraud rate rose to 15.8% for the second quarter of 2007. [Source: Click Forensics [via Econsultancy blog](#), July 2007]
 - The overall average click fraud rate was 15.8%, up from 14.1% for the same period last year, and 14.8% from Q1 2007.
 - The average click fraud rate on content networks, including Google AdSense and the Yahoo! Publisher Network, was 25.6%, up from 21.9% for Q1 2007.
 - Apart from North America, most click fraud originates from France (5.1%), China (3.2%) and Australia (3%).

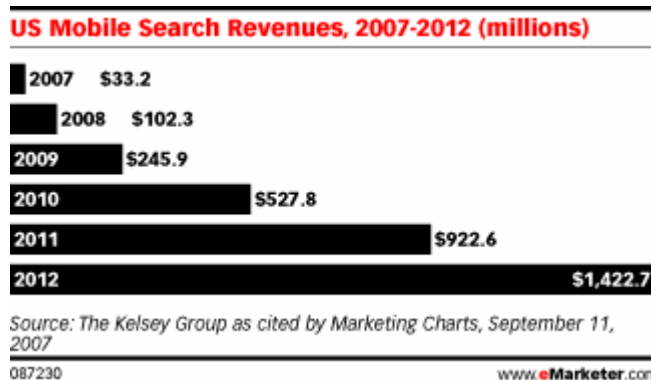
9. Mobile Search Market

United Kingdom

- Mobile search was the fastest growing format in 2009 – up 41% (share 54%), display grew 24% (share 46%) [Source: IAB/PwC, via [AOP Digital Landscape Report](#), June 2010]
- Mobile search was the fastest growing format – up 41% to a new high of £20.2 million and a market share of 54% (50% in 2008). [Source: IAB/PwC, via [AOP Digital Landscape Report](#), June 2010]
- Only 5% of companies are paying to advertise on mobile search listings. That percentage had not increased since 2008, although 23% were planning to do this. [Source: [Econsultancy / Guava UK Search Engine Marketing Benchmark Report](#), April 2009]
- Mobile search hasn't taken off yet - 37% of respondents say it isn't yet “on their radar”, and 32% say they have no plans to use Mobile Search advertising. [Source: Econsultancy / Guava UK Search Engine Marketing Benchmark Report, April 2009]
- 55.1% used a search engine on their iPhone, compared with 31.9% of all Smartphone users, and 12.3% for all mobiles. [Source: comScore via [Econsultancy Blog](#), March 2009]

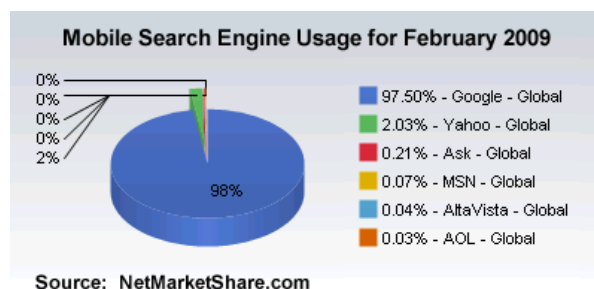
United States

- Around 26 million people (15% of the mobile phone customers in the US), use the mobile web at least once a month. [Source: [Forrester](#), October 2009]
- US mobile search revenue (2007-12) [Source: Kelsey Group, via eMarketer, September 2007]



International

- 32% of searchers with Internet-capable cellular phones search for local business information from the mobile Internet, an 11% increase from 2008. [Source: [TDM Directional Marketing](#), October 2009]
- Google dominates the Mobile Search market with 97.5% of all mobile searches. [Source: Net Applications via [Econsultancy Blog](#), March 2009]



10. Acknowledgements

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eGovernment News	Kontraband	Postini	Enquisite
eCircle	London Business School	Princeton Survey Research Associates International	M-Metrics
EIAA	eDigital	Thomson Intermedia	Mobile Data Association
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Accessibility Forum	Email Systems	M:Metrics	PwC
ACNielsen	EmailLabs	Macromedia	Quaestor Research and Marketing Strategists
Actinic	EmailMonitor	Makovsky & Co	Questus
Admap	eMarketer	Marketing magazine	Rax.ru
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AlchemyWorx	Employers' Forum on Disability	MarketingProfs	Receptional
Amazon	Enpocket	MarketingSherpa	Responsys
Analysys International	Enquiro	MarketingVox	Return Path
Anti-Phishing Group	Entertainment Media Research	McKinsey	Revenue Science
AOL	Epsilon Interactive	MediaBuyerPlanner	Revolution
AOP	Equi-Media	Media Contacts	RNIB
AP	eROI	MediaPost	Royal Mail
APACS	eTForecasts	Merchant Risk Council	Russell Research
Atlas	Eyeblaster	Merrill Lynch	Scarborough Research
Axon Publishing	Financial Times	MetaPack	SciVisum
Bango	Forrester	Millward Brown	Search Engine Guide
BARB	Foviance	Mintel	SearchEngineWatch
B2B Marketing	Fireclick Index	Microsoft bCentral	SearchIgnite
BBC	Gallup	MMXI	SEMPO



BCG	Gartner	Mobile Data Association	Sento Corp
BCS	GetSafeOnline	Motorola	SEO-PR
Ben Edelman	GfK market research	MSN	Silicon.com
Benchmark Research	GMI	Mutual Points	silverPOP
Bernstein Research			
Bigfoot Interactive	Goldman Sachs	Nakamura Communications	Site Confidence
BIGResearch	Gomez	Net.Applications.com	SiteIntelligence
BizRate/Shopzilla	Google	National Sales Association	Sky
Bloglines	Group M	National Statistics	Sophos
Bradley Horwitz	Guardian	NetIQ	Spannerworks
Brandweek	Guardian Unlimited	Netonomy	Spectrum Strategy
BRMB	GVU	Newspaper Association of America	Starcom
Bronto	Harris Interactive	Nielsen Analytics	Steelside
Brown University	Harvest Digital	Nielsen Entertainment	Strategy Analytics
Browser News	Hitwise	Nielsen//NetRatings	Technorati
BSkyB	Hostway	NMA	Telecom Express
BURST! Media	IAB	Nomensa	Telephia
Carat	IAMA	NOP	TGI.net
CDMS	iBurbia	NPD Online	The Independent
China Internet Network Information Center	ICQ	NTC Research	The Kelsey Group
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Church of the Customer	IDS	OFT	The Times
Cida	IFPI	Olswang	The Usability Company (Foviance)
ClickForensics	i-Level	OMD Insight	TheWiseMarketer
Clicks2customers	i-Village	OneStat	Thomas, Townsend & Kent
ClickZ	IMRG	Oneupweb	TNS
comScore	IMS Research	Online Publishers Association	Touch Clarity
CommTouch	Informa Telecoms & Media	ONS	TradeDoubler
Compete Inc	Information Week	OPT-4	Transversal

Contact MC	Initiative	Orange Broadband	TravelDailyNews
Continental Research	In-Stat	Outsell	Unica
Coremetrics	InsightExpress	Overture	Universal McCann
Cornell University	Intel	Panlogic	University of Oxford
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CyberSource	IPA	PCPRO	Verdict Research
Cymfony	Ipsos	PC World Magazine	W3C
Dart	IPT	Performics	Wanadoo UK plc & SPA
Datamonitor	IronPort	Perseus	Webroot
Dave Chaffey	iProspect	Pew	WebSideStory
Deloitte	lpwalk	Pheedo	Wireless World Forum
Deutsche Bank	iResearch	PhoCusWright	Workplace Print Media
Digital Strategy Consulting	iMedia Connection	Point Topic	Yahoo!
DoubleClick	IRN Research	Piper Jaffray & Co	Yankee Group
DirectGov	ITFacts	Ponemon Institute	YouGov
Direct Partners	Joshua ConsumerCheck	Porter Research	ZDNet Research
Direct Marketing Association	Juniper Research	Precedent	Zendor
DRC	JupiterResearch	Porter Novelli	Zona Research
Dynamic Logic	Snow Valley	Merkle	Edison Media Research
Easily			
eCircle			

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