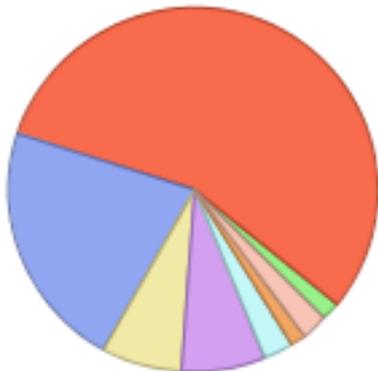


Google--the future of online and offline marketing

Final survey results

February 10, 2006

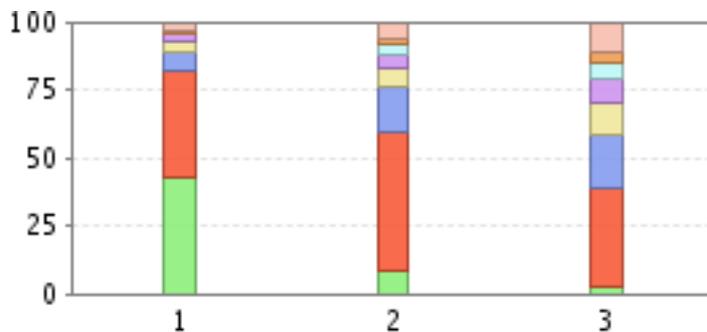
1. Approximately how much does your company spend on advertising and promotion activities (excluding sales) as a percentage of annual revenue?



0% of annual revenue	1.75% (4)	1-5% of annual revenue	55.7% (127)
6-10% of annual revenue	21.93% (50)	11-15% of annual revenue	7.02% (16)
16-20% of annual revenue	7.46% (17)	21-25% of annual revenue	2.63% (6)
26-30% of annual revenue	1.32% (3)	More than 30% of annual revenue	2.19% (5)

Response: 228

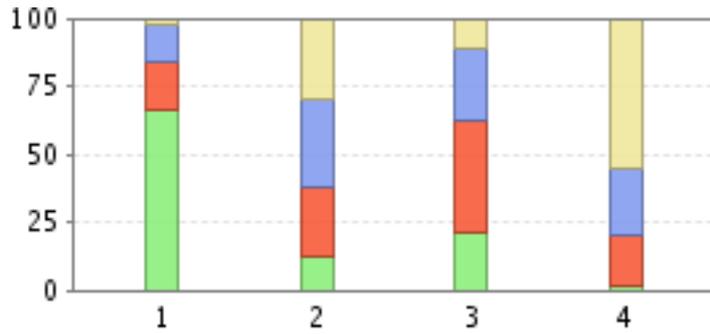
2. Approximately how much does your company spend on online advertising and promotion, as a percentage of its total marketing budget? Please indicate how much was spent two years ago, how much is spent now, and how much do you feel will be spent in two years' time.



	0% of marketing budget	1-5% of marketing budget	6-10% of marketing budget	11-15% of marketing budget	16-20% of marketing budget	21-25% of marketing budget	26-30% of marketing budget	More than 30% of marketing budget
1 Two years ago	42.73% (97)	39.21% (89)	6.61% (15)	4.41% (10)	2.2% (5)	0% (0)	1.76% (4)	3.08% (7)
2 Today	7.89% (18)	51.32% (117)	17.11% (39)	6.14% (14)	5.26% (12)	3.95% (9)	2.19% (5)	6.14% (14)
3 Two years' time	2.2% (5)	36.12% (82)	19.82% (45)	11.89% (27)	8.81% (20)	5.73% (13)	4.41% (10)	11.01% (25)

Response: 228

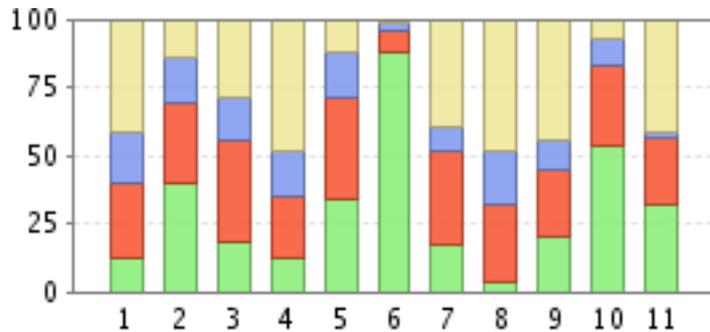
3. In which part of an advertising or promotion campaign does your company invest the most management time? Rank in order from 1st (most investment of management time) to 4th (least investment of management time).



	1st	2nd	3rd	4th
1 Developing strategy and goals	65.79% (150)	17.98% (41)	13.6% (31)	2.63% (6)
2 Selecting and negotiating with partners	12.72% (29)	25.44% (58)	31.58% (72)	30.26% (69)
3 Executing campaign	21.49% (49)	41.23% (94)	26.32% (60)	10.96% (25)
4 Assessing performance of campaign	1.76% (4)	18.06% (41)	25.11% (57)	55.07% (125)

Response: 228

4. Over the next two years, do you expect your company to increase or decrease spending on the following media channels?



	Increase	No change	Decrease	We do not use this channel
1 Print classifieds	12% (27)	28% (63)	18.67% (42)	41.33% (93)
2 Direct mail	39.38% (89)	30.09% (68)	15.93% (36)	14.6% (33)
3 Newspapers	18.14% (41)	37.61% (85)	15.49% (35)	28.76% (65)
4 Radio	12.33% (28)	22.91% (52)	15.86% (36)	48.9% (111)
5 Magazines	34.21% (78)	36.84% (84)	16.67% (38)	12.28% (28)
6 Internet	87.67% (199)	8.37% (19)	2.2% (5)	1.76% (4)
7 Outdoor advertising	16.74% (38)	34.8% (79)	8.81% (20)	39.65% (90)
8 Yellow Pages/other telephone directories	3.08% (7)	29.07% (66)	19.38% (44)	48.46% (110)
9 Television	19.91% (45)	24.34% (55)	11.5% (26)	44.25% (100)
10 Sponsorships and events	53.07% (121)	30.26% (69)	9.21% (21)	7.46% (17)
11 Guerrilla marketing	31.84% (71)	24.22% (54)	2.24% (5)	41.7% (93)

Response: 228

5. Looking just at your company's online advertising and promotion, how is spending apportioned among these activities? Total should equal 100%.

	Banner advertisements	E-mail marketing	Search engine optimisation	Paid search advertising	Mobile marketing	Pop-up or pop-under ads	Rich media ads	Sponsored websites	Other
Average	12.33	24.79	13.14	7.07	3.67	2.38	7.07	15.33	13.4
Highest	100	100	100	100	80	40	75	100	100
Lowest	0	0	0	0	0	0	0	0	0
Standard Deviation	17.1	27.31	18.98	15.83	9.82	5.92	14.79	23.1	24

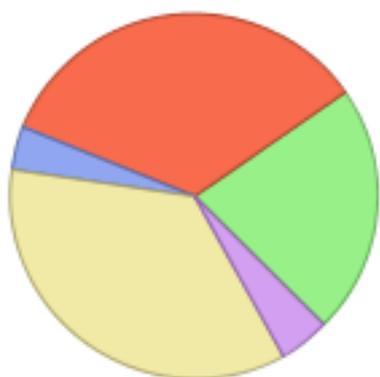
Response: 224

6. In two years' time, how do you expect your company's spending on online advertising and promotion to be apportioned among these activities? Total should equal 100%.

	Banner advertisements	E-mail marketing	Search engine optimisation	Paid search advertising	Mobile marketing	Pop-up or pop-under ads	Rich media ads	Sponsored websites	Other
Average	10.71	25	15.22	7.25	6.05	2.69	7.56	16.04	8.82
Highest	100	100	100	100	80	70	75	100	100
Lowest	0	0	0	0	0	0	0	0	0
Standard Deviation	14.69	24.06	17.98	14.11	11.26	7.16	13.2	20.98	19.66

Response: 225

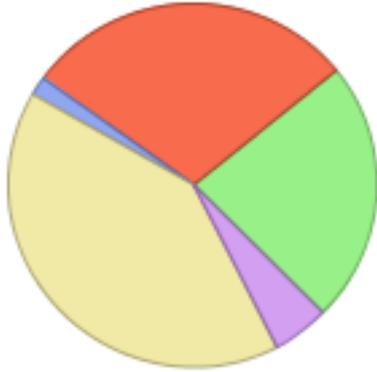
7. Over the past two years, how has your company allocated online advertising and promotion spend as part of its overall marketing budget?



■ Online spending has grown or shrunk in direct proportion to the overall marketing budget	22.12% (50)	■ We have reallocated from offline to online while keeping the overall marketing budget constant	34.07% (77)
■ We have reallocated from online to offline while keeping the overall marketing budget constant	3.98% (9)	■ We have allocated new spending for online advertising and promotion	35.4% (80)
■ We have allocated new spending for offline advertising and promotion	4.42% (10)		

Response: 226

8. Over the next two years, how do you expect your company to allocate online advertising and promotion spend as part of its overall marketing budget?



Online spending will grow or shrink in direct proportion to the overall marketing budget	23.35% (53)	We will reallocate from offline to online while keeping the overall marketing budget constant	29.07% (66)
We will reallocate from online to offline while keeping the overall marketing budget constant	1.76% (4)	We will allocate new spending for online advertising and promotion	40.97% (93)
We will allocate new spending for offline advertising and promotion	4.85% (11)		

Response: 227

9. What percentage of your company's products and services do you generally advertise?



Less than 10%	7.89% (18)	10% to 20%	8.33% (19)
20% to 30%	10.09% (23)	30% to 40%	8.33% (19)
40% to 50%	7.02% (16)	50% to 60%	7.89% (18)
60% to 70%	9.65% (22)	70% to 80%	8.77% (20)
Over 80%	25% (57)	Don't know	7.02% (16)

Response: 228

10. Which marketing objectives do your company's online advertising/promotion activities target today, and which will they target in two years' time? Select all that apply.

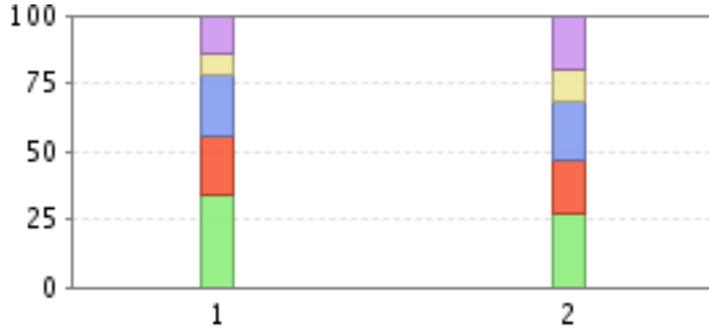
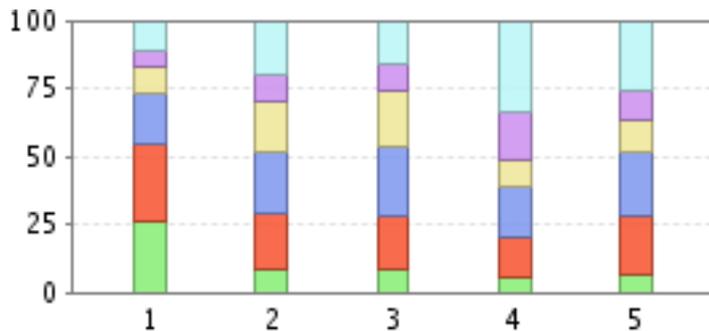


	Image building/Brand equity	Lead generation	Customer acquisition	Customer transaction	Customer retention
1 Today	33.46% (182)	21.51% (117)	22.61% (123)	7.9% (43)	14.52% (79)
2 Two years' time	26.63% (192)	19.83% (143)	21.36% (154)	12.34% (89)	19.83% (143)

Response: 228

11. How effective are your company's online advertising/promotion activities at meeting marketing objectives in these areas? Rate on a scale of 1 to 5, where 1=Very effective and 5=Not effective at all.



	Very effective1	2	3	4	Not effective5	Don'tknow
1 Image building/Brand equity	25.55% (58)	28.63% (65)	18.94% (43)	9.69% (22)	5.73% (13)	11.45% (26)
2 Lead generation	8.6% (19)	19.91% (44)	23.08% (51)	18.1% (40)	9.95% (22)	20.36% (45)
3 Customer acquisition	8.64% (19)	19.09% (42)	25.91% (57)	20% (44)	10.45% (23)	15.91% (35)
4 Customer transaction	5.26% (11)	15.31% (32)	18.18% (38)	10.05% (21)	17.22% (36)	33.97% (71)
5 Customer retention	6.88% (15)	21.56% (47)	22.94% (50)	11.93% (26)	11.01% (24)	25.69% (56)

Response: 228

12. To what degree are online and offline marketing combined into a single strategy at your company? Rate on a scale of 1 to 10, where 1=Fully integrated and 10=Not at all integrated.



1 (Fully integrated)	14.47% (33)	2	10.09% (23)
3	17.98% (41)	4	15.79% (36)
5	14.91% (34)	6	5.26% (12)
7	9.21% (21)	8	7.46% (17)
9	1.75% (4)	10 (Not at all integrated)	3.07% (7)

Response: 228

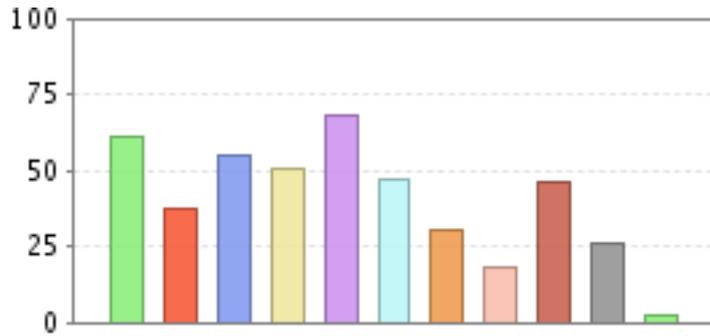
13. How do your company's online and offline marketing campaigns influence each other? Select the most applicable statement.



Our offline campaigns determine the strategy of our online campaigns	33.92% (77)	Our online campaigns determine the strategy for our offline campaigns	8.81% (20)
Our offline and online campaigns interact, but neither determines the strategy of the other	43.61% (99)	Our offline and online campaigns do not interact	8.37% (19)
I don't know	5.29% (12)		

Response: 227

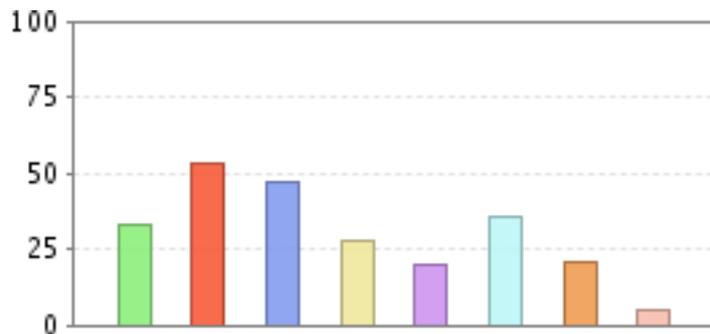
14. What are your company's objectives for online brand marketing in 2006? Select all that apply.



<input type="checkbox"/>	Communicate product or service quality	60.96% (139)	<input type="checkbox"/>	Link brand message with brand experience	37.28% (85)
<input type="checkbox"/>	Increase brand preference	54.82% (125)	<input type="checkbox"/>	Generate customer leads	50.44% (115)
<input type="checkbox"/>	Build brand awareness	68.42% (156)	<input type="checkbox"/>	Build brand affinity	46.93% (107)
<input type="checkbox"/>	Gather customer information	30.7% (70)	<input type="checkbox"/>	Link lifestyle with brand (eg, sponsor sporting or cultural activities)	18.42% (42)
<input type="checkbox"/>	Influence purchase behaviour	46.49% (106)	<input type="checkbox"/>	Build customer communities	25.88% (59)
<input type="checkbox"/>	Other, please specify	2.63% (6)			

Response: 228

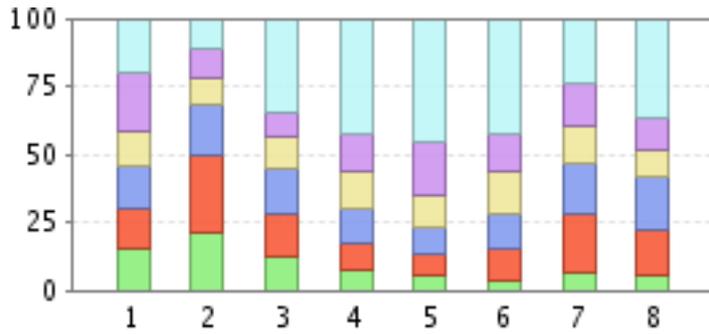
15. Which measurements does your company use to evaluate the overall impact of its online marketing programmes? Select all that apply.



<input type="checkbox"/>	ROI from a marketing campaign	33.04% (74)	<input type="checkbox"/>	Sales growth attributed to a campaign	52.68% (118)
<input type="checkbox"/>	Brand awareness generated by a campaign	46.88% (105)	<input type="checkbox"/>	Purchase intent generated by a campaign	27.23% (61)
<input type="checkbox"/>	Improved message association	20.09% (45)	<input type="checkbox"/>	Delivering on metrics specified in the marketing campaign (eg, cost per conversion, number of impressions, click-through rate)	35.71% (80)
<input type="checkbox"/>	Meeting interactive goals specified in the marketing campaign (eg, exposure to advertisement, participating in quizzes or games)	20.98% (47)	<input type="checkbox"/>	Other, please specify	4.91% (11)

Response: 224

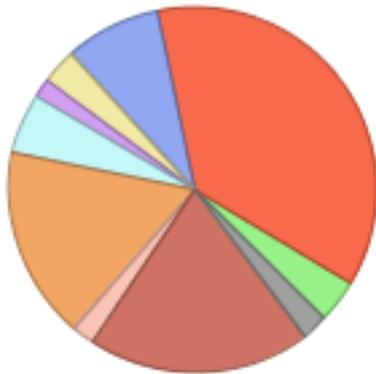
16. How difficult is it to measure the impact of the following online marketing activities? Rate on a scale of 1 to 5, where 1=Very easy to measure and 5=Very difficult to measure.



	Very easy to measure 1	2	3	4	Very difficult to measure 5	Don't know
1 Banner advertising	15.62% (35)	14.73% (33)	15.18% (34)	12.95% (29)	21.43% (48)	20.09% (45)
2 E-mail marketing	20.89% (47)	28.89% (65)	18.67% (42)	9.78% (22)	10.67% (24)	11.11% (25)
3 Paid search advertising	12.39% (27)	16.06% (35)	16.51% (36)	11.47% (25)	9.17% (20)	34.4% (75)
4 Mobile marketing	7.31% (16)	10.05% (22)	12.33% (27)	14.16% (31)	13.24% (29)	42.92% (94)
5 Pop-up or pop-under ads	5.07% (11)	7.83% (17)	9.68% (21)	12.44% (27)	19.35% (42)	45.62% (99)
6 Rich media ads	3.26% (7)	11.63% (25)	13.49% (29)	15.35% (33)	13.49% (29)	42.79% (92)
7 Sponsored websites	6.76% (15)	21.62% (48)	18.02% (40)	13.96% (31)	15.32% (34)	24.32% (54)
8 Affiliate marketing	5.05% (11)	17.43% (38)	18.81% (41)	10.55% (23)	11.47% (25)	36.7% (80)

Response: 227

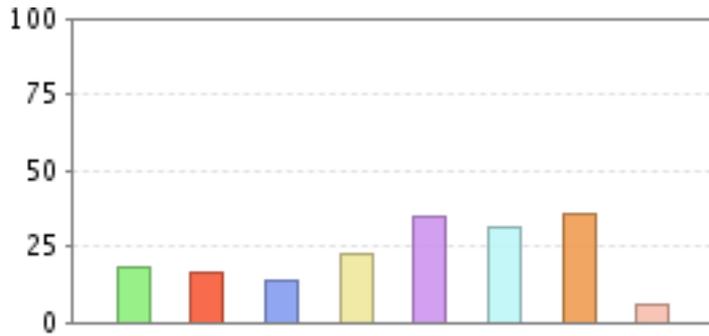
17. Which online advertising strategy produces the best ROI for your company? Select one.



Banner advertising	3.98% (9)	E-mail marketing	36.73% (83)
Paid search advertising	8.41% (19)	Mobile marketing	3.1% (7)
Pop-up or pop-under ads	1.77% (4)	Rich media ads	5.31% (12)
Sponsored websites	16.81% (38)	Affiliate marketing	2.21% (5)
Don't know	19.47% (44)	Other, please specify	2.21% (5)

Response: 226

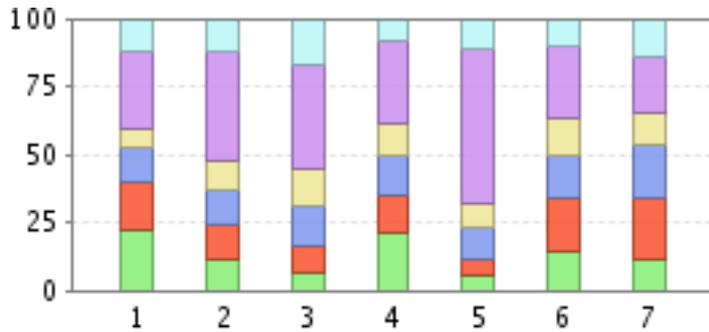
18. Which areas of media are hardest to harmonise with Internet media in order to plan, execute and evaluate an integrated marketing campaign? Select up to three.



■ Broadcast television	18.06% (39)	■ Cable and satellite television	16.2% (35)
■ Print (newspapers and magazines)	13.43% (29)	■ Radio	22.69% (49)
■ Yellow Pages/other telephone directories	34.26% (74)	■ Outdoor advertising	31.48% (68)
■ Sponsorships and events	35.19% (76)	■ Other, please specify	6.02% (13)

Response: 216

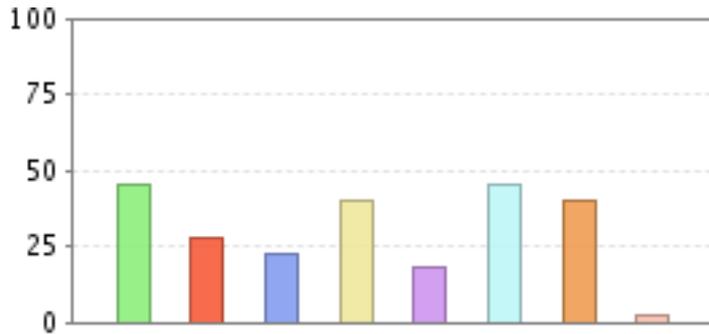
19. Over the next two years, how interested will your company be in marketing in the following emerging media channels? Rate each on a scale of 1 to 5, where 1=Very interested and 5=Not interested.



	■ Veryinterested1	■ 2	■ 3	■ 4	■ Notinterested5	■ Don'tknow
1 Product placement	22.57% (51)	16.81% (38)	12.83% (29)	6.64% (15)	29.2% (66)	11.95% (27)
2 Video-on-demand	11.16% (25)	12.5% (28)	13.39% (30)	10.71% (24)	39.73% (89)	12.5% (28)
3 Time-shifted video (eg, TiVo, DVR)	6.36% (14)	10% (22)	15% (33)	13.18% (29)	38.64% (85)	16.82% (37)
4 Mobile phone text or graphical messaging	21.24% (48)	13.72% (31)	14.16% (32)	11.95% (27)	30.97% (70)	7.96% (18)
5 Video games	5.83% (13)	5.38% (12)	11.66% (26)	8.97% (20)	56.5% (126)	11.66% (26)
6 Blogs	14.29% (32)	19.64% (44)	15.18% (34)	13.84% (31)	26.34% (59)	10.71% (24)
7 Social network sites (eg, MySpace)	11.06% (25)	22.57% (51)	19.91% (45)	11.5% (26)	20.8% (47)	14.16% (32)

Response: 228

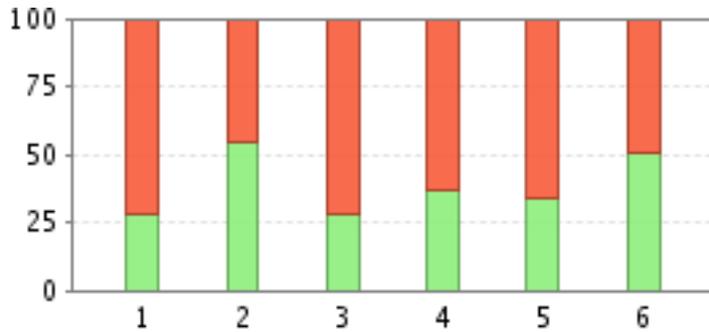
20. Which three areas of emerging media and marketing do you see the greatest need for an improved set of audience measurements? Select up to three.



Product placement	45.37% (98)	Video-on-demand	27.31% (59)
Time-shifted video	22.22% (48)	Mobile phone text or graphical messaging	39.81% (86)
Video games	17.59% (38)	Blogs	44.91% (97)
Social network sites (eg, MySpace)	40.28% (87)	Other, please specify	2.31% (5)

Response: 216

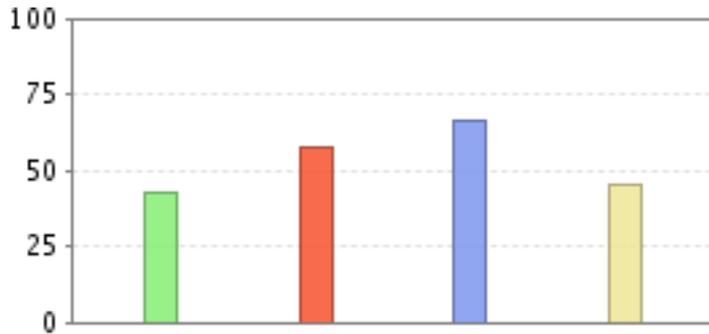
21. Please indicate whether you agree with the following statements regarding interactive marketing today and two years from now.



	Today (select statements you agree with)	In two years (select statements you agree with)
1 Online is the media platform that determines how major campaigns are planned and executed	28.19% (42)	71.81% (107)
2 Brand advertising is driving the next phase of online marketing growth	54.82% (125)	45.18% (103)
3 Mobile marketing initiatives are beginning to approach mainstream acceptance	28.09% (50)	71.91% (128)
4 User-generated media are beginning to attract more marketing spend	36.74% (79)	63.26% (136)
5 Media analytics skills are reaching equal footing with creative skills in advertising agencies	33.52% (60)	66.48% (119)
6 The level of accountability for all marketing activities is rising dramatically	50.18% (136)	49.82% (135)

Response: 224

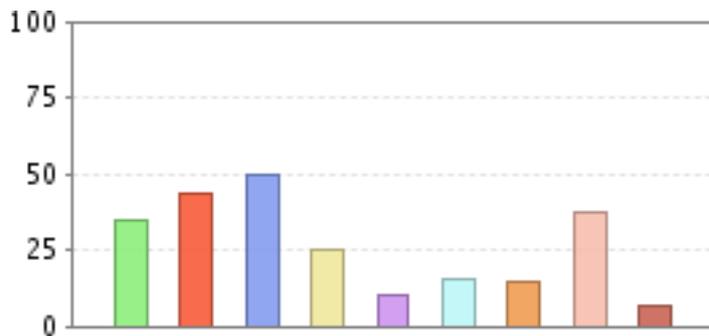
22. Which of the following describe likely transformations in your company's marketing function over the next two years? Select all that apply.



- | | | | |
|---|--------------|--|--------------|
| <input type="checkbox"/> The current distinction between online and offline marketing efforts will blur to the point of irrelevance | 42.92% (97) | <input type="checkbox"/> Marketing departments and campaigns will be integrated much earlier in the product or service development process | 57.08% (129) |
| <input type="checkbox"/> Marketing will be forced to quantify its direct contribution to the bottom line more than before | 66.37% (150) | <input type="checkbox"/> The marketing department will become more deeply involved in decisions regarding our strategic partnerships and alliances | 45.13% (102) |

Response: 226

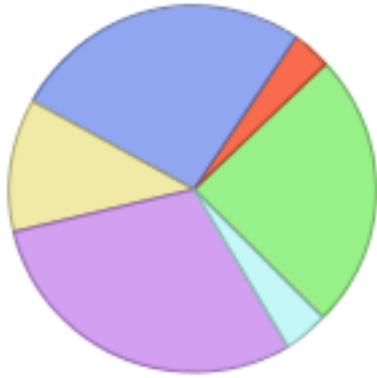
23. Which Internet trend(s) did you discover in the last twelve months through your children or other young people? Select all that apply.



- | | | | |
|--|-------------|---|-------------|
| <input type="checkbox"/> Podcasting | 34.9% (67) | <input type="checkbox"/> Social networking (eg, MySpace) | 43.75% (84) |
| <input type="checkbox"/> Blogging | 50% (96) | <input type="checkbox"/> Sharing content on a common message board (eg, Flickr) | 25% (48) |
| <input type="checkbox"/> Social bookmarking (eg, del.ici.ous) | 10.42% (20) | <input type="checkbox"/> Moblogging (eg, blog entries for mobile phones) | 15.1% (29) |
| <input type="checkbox"/> Syndicating content via Real Simple Syndication (RSS) | 14.58% (28) | <input type="checkbox"/> Multi-player online games | 37.5% (72) |
| <input type="checkbox"/> Other, please specify | 6.25% (12) | | |

Response: 192

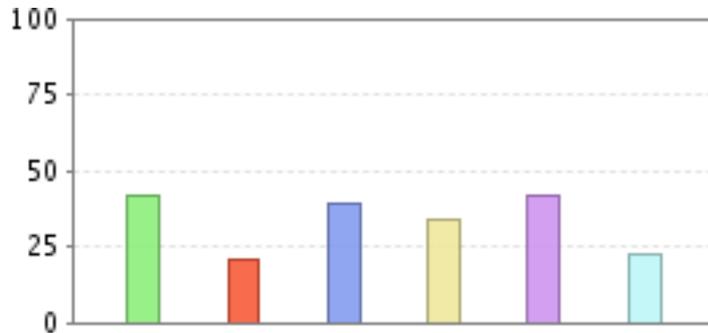
In which region are you personally based?



Asia-Pacific	24.56% (56)	Latin America	3.51% (8)
North America	26.32% (60)	Eastern Europe	11.84% (27)
Western Europe	29.82% (68)	Middle East & Africa	3.95% (9)

Response: 228

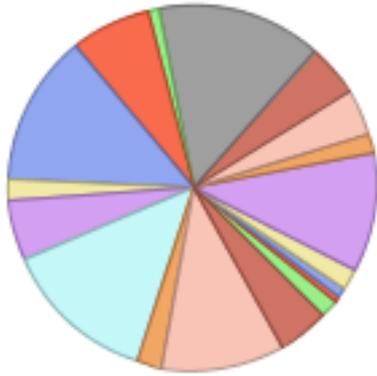
For which region(s) do you have responsibility for, or influence over, marketing decisions?



Asia-Pacific	41.96% (94)	Latin America	20.98% (47)
North America	39.29% (88)	Eastern Europe	33.48% (75)
Western Europe	41.96% (94)	Middle East & Africa	22.32% (50)

Response: 224

What is your primary industry?



Agriculture and agribusiness	1.78% (4)	Automotive	0.44% (1)
Chemicals	0.89% (2)	Construction and real estate	1.78% (4)
Consumer goods	10.67% (24)	Defence and aerospace	0% (0)
Education	1.78% (4)	Energy and natural resources	4% (9)
Entertainment, media and publishing	4.44% (10)	Financial services	14.67% (33)
Government/Public sector	0.89% (2)	Healthcare, pharmaceuticals and biotechnology	7.11% (16)
IT and Technology	13.33% (30)	Logistics and distribution	1.78% (4)
Manufacturing	5.33% (12)	Professional services	13.78% (31)
Retailing	2.22% (5)	Telecoms	10.67% (24)
Transportation, travel and tourism	4.44% (10)		

Response: 225

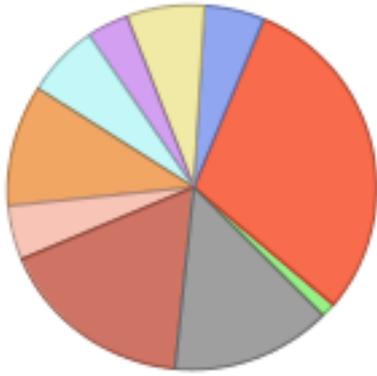
What are your organisation's global annual revenues in US dollars?



\$500m or less	40.36% (90)	\$500m to \$1bn	12.11% (27)
\$1bn to \$5bn	16.14% (36)	\$5bn to \$10bn	11.21% (25)
\$10bn or more	20.18% (45)		

Response: 223

Which of the following best describes your title?



Board member	1.32% (3)	CEO/President/Managing director	29.82% (68)
Chief Marketing Officer	5.26% (12)	Other C-level executive	7.02% (16)
VP of Marketing	3.51% (8)	Other VP	6.58% (15)
Director of Marketing	10.53% (24)	Other director	4.82% (11)
Marketing Manager	17.11% (39)	Other manager	14.04% (32)

Response: 228

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