



iProspect APAC Consumer Search Behaviour & Attitudes Study

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Objectives & Background

- In June 2010, iProspect partnered with Aevolve, Aegis Media's specialist global insight & analytics division, to develop an online survey on search attitudes and behaviours amongst APAC search engine users (referred to as APAC consumers throughout the report)
- The survey, fielded by Toluna (the leading global online panel provider), was conducted amongst 15,000 APAC consumers aged 18-64 years old across eleven markets; China, Hong Kong, India, Japan, Malaysia, Singapore, Korea, Thailand, Taiwan, Australia and New Zealand
- The objectives of the study were to provide iProspect and our clients with a greater understanding in:
 - **Search behaviour**
 - Frequency of online search
 - Search Engines used
 - Type of content searched
 - Categories searched
 - **Consumer perceptions of organic and paid for search**
 - Ability to distinguish between organic and paid for search
 - Perception of both channels
 - **Role of touchpoints in prompting online search**
 - Influence of eleven touchpoints, ranging from word of mouth, broadcast media, in-store displays to online display advertising
 - **Mobile search**
 - The level of mobile search
 - Perceived value of mobile search
- The report also forms the foundation of subsequent research that iProspect will commission regularly to assist clients extract maximum value from paid and organic search budgets across the region

Study Methodology

- The survey was conducted in eleven APAC markets using an online survey methodology
- The total sample across the region is 15,000 respondents, with all markets achieving a sample size of 1,000, with the exception of China, where a sample of 5,000 was achieved. The respondent base were consumers who had used any search engines in the previous six months
- Throughout the report, the universe of respondents to this survey will be referenced as APAC consumers

Survey Qualification Screener

- In the past six months, have you used any search engines (Google, Yahoo!, MSN/Bing, Naver, Daum, or Baidu) to perform a search online?

MARKET	LANGUAGE	SAMPLE SIZE
• China	Simplified Chinese	5,000
• Hong Kong	Traditional Chinese / English	1,000
• India	English	1,000
• Japan	Japanese	1,000
• Malaysia	Malaysian / English	1,000
• Singapore	Simplified Chinese	1,000
• Korea	Korean	1,000
• Thailand	Thai	1,000
• Taiwan	Traditional Chinese	1,000
• Australia	English	1,000
• New Zealand	English	1,000

Fieldwork Dates

- June – July 2010

Sample

- 18-64 year old adults. Comscore data was used to quota fieldwork samples for age group and gender profile of internet users

Data supplier / Panel provider

- Toluna

Key Findings for Marketers

Search performance is enhanced when it is part of an integrated strategy with offline and other online communications

Word of mouth is the most significant prompt to search, closely followed by TV and print advertising. Online advertising was also seen as an important prompt. Young consumers (15-24) were particularly influenced by word of mouth and TV advertising compared to the broader consumer profile. For marketers, social media and traditional word of mouth advertising are particularly important to drive search performance. Behaviour differs across the region with Japan, Thailand and South Korea more influenced by TV advertising over word of mouth. Marketers should also be aware that a failure to include search as part of a communications plan may result in consumers switching brands through the search process.

APAC consumers are dramatically increasing their use of search as a means of navigating the web

The majority of APAC consumers search the web via search engines several times a day (77%). In the last six months there has been a net increase of 71% of those claiming to have increased their use of search engines in the last 6 months. This behaviour is consistent with iProspect US studies in previous years that found that search engines become more heavily used as consumers become more familiar with the internet. Rapid growth in usage reflects the rapidly evolving and maturing online environments in key markets such as China (77%), India (92%), Malaysia(81%) and Singapore (78%)

Search across APAC should be carefully tailored across individual markets and will require the adoption of several search engines

51% of APAC consumers claim to use Google most frequently, however, this varies dramatically within individual markets, with Google attracting 9% of our panel in Korea versus 89% in New Zealand and India. APAC marketers need to develop comprehensive strategies for Baidu, Yahoo! and Naver as a minimum, in addition to Google. Our research indicates that Microsoft's Bing has struggled to build significant share in APAC to date.

Building top search listings in both organic and paid search is critical to driving awareness

The majority of APAC consumers (58%) cannot distinguish between paid and organic search results. A focus on both is required to ensure brands/products receive adequate share of voice within results. APAC consumers who are aware of the difference between paid and organic search listings consider both critical in increasing their *awareness of a brand/product* (62% Organic & 63% Paid). Our research suggests that marketers who do not adopt an integrated paid and organic search strategy are likely to be under-performing in generating awareness, compared to those who do adopt an integrated approach.

A range of content assets should be optimised within search to achieve best results

78% of APAC consumers search for news/press release information, however, image search (65%) and video search (57%) are also very popular. Maps & Locations were also heavily searched in a number of markets including Singapore, Hong Kong, Taiwan, Japan, Korea and Malaysia. Marketers should consider making the best use of content, social media and optimisation of content formats, to attract consumers through all types of search behaviour. Advanced search practices such as Search Leveraged PR (SLPR), content seeding, image & video optimisation and multi-variate testing are essential, in addition to paid search, to maximise search performance.

Mobile Search is a mainstream behaviour and requires integration into online search strategies

79% of all APAC consumers used mobile search in the last year. China, Thailand, India and South Korea are the largest users of mobile search, where in Australia and New Zealand the majority of users have not used mobile search to date. Those markets where mobile search is most used, also indicated that mobile search has become more important in the way they navigate the mobile web.

Search is an essential marketing channel for Computer & Electronics, Entertainment, Food & Drink and Banking & Finance with 50% or more of APAC consumers turning to search during the purchase process

While APAC consumers search across a broad range of categories, the most searched categories across APAC are Computers & Electronics (66%), Entertainment (60%), Food & Drink (53%) and Banking & Finance (50%) are searched by the majority of APAC consumers during the purchase process. Without an active search strategy across these and other categories (detailed later), marketers are likely to lose consumers during the research and purchase process.

Survey Questions, Results & Analysis

Q1 - In the past 6 months, how often have you performed an Internet search using a search engine?

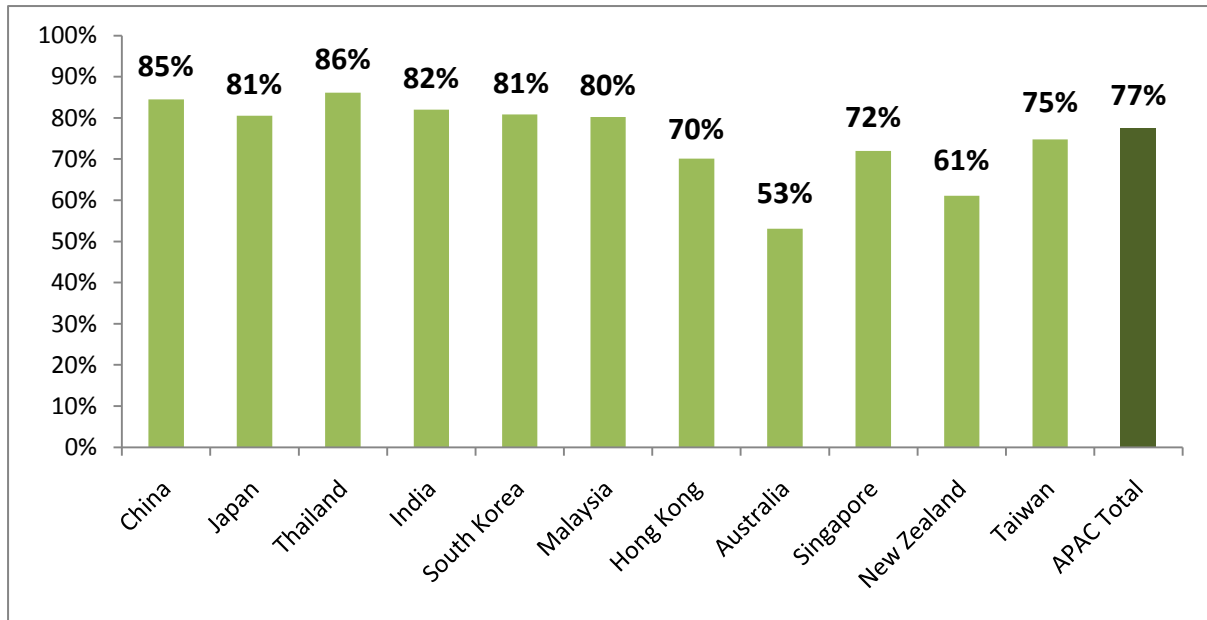


Figure 1

The majority of APAC consumers search several times a day (77%). Search is now the key tool used for navigating the internet for the majority of consumers and has surpassed content portals as a means of navigating the web.

Q2 - Compared to a year ago, how has your use of search engines to perform searches in the past 6 months changed? Increased, decreased or no change?

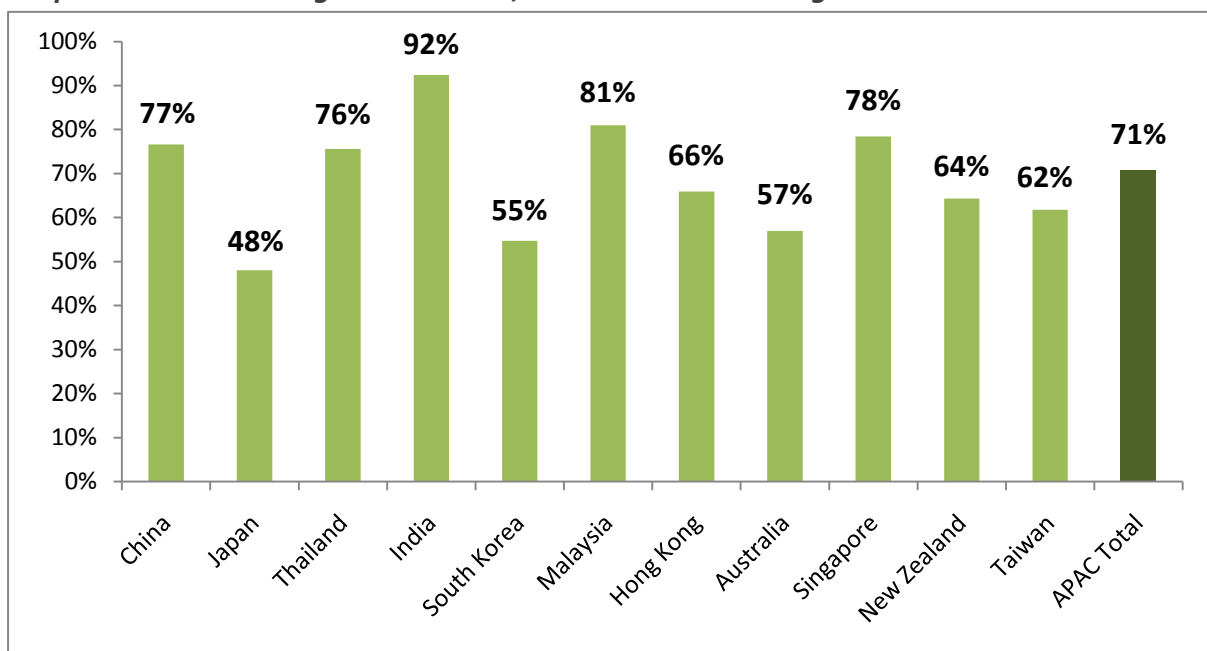
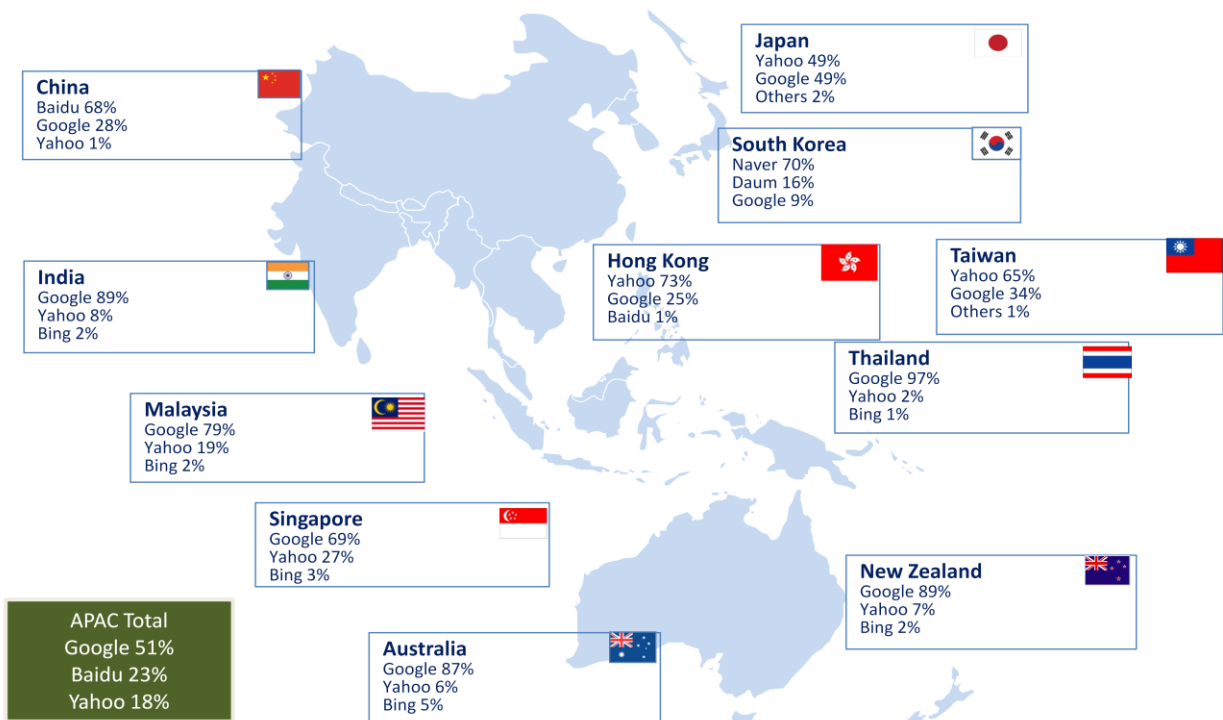


Figure 2: Chart shows the net increase of search usage

There is a net increase of 71% APAC consumers claiming they are performing more online search than six months ago . The role of search is increasing. Marketers should consider how APAC consumers will locate and access their web sites **before** making significant infrastructure development.

Q3 - Which of the following search engines do you use most frequently?



Q3 Which of the following search engines do you use most frequently (top 3 per country)?

Source: iProspect APAC Consumer Search Behaviour & Attitudes Survey 2010
Base: All respondents

Figure 3: Choice of search engines varies widely between markets

Only 51% of APAC consumers claim to use Google most frequently. Google dominates in a number of markets such as Thailand, New Zealand, Australia, India and Malaysia; whilst Yahoo dominates in Hong Kong and Taiwan.

In China and South Korea local market search engines dominate; in China 68% of consumers use Baidu most frequently; whilst in South Korea 70% use Naver most frequently.

Marketers should take care to be aware of the different search environments within each market and the differences in how PPC and SEO are treated within each search engine.

Q4 - When you perform a search online, how many pages of search results do you read through before you click on a link or refine your search again? Mean number of pages by age:

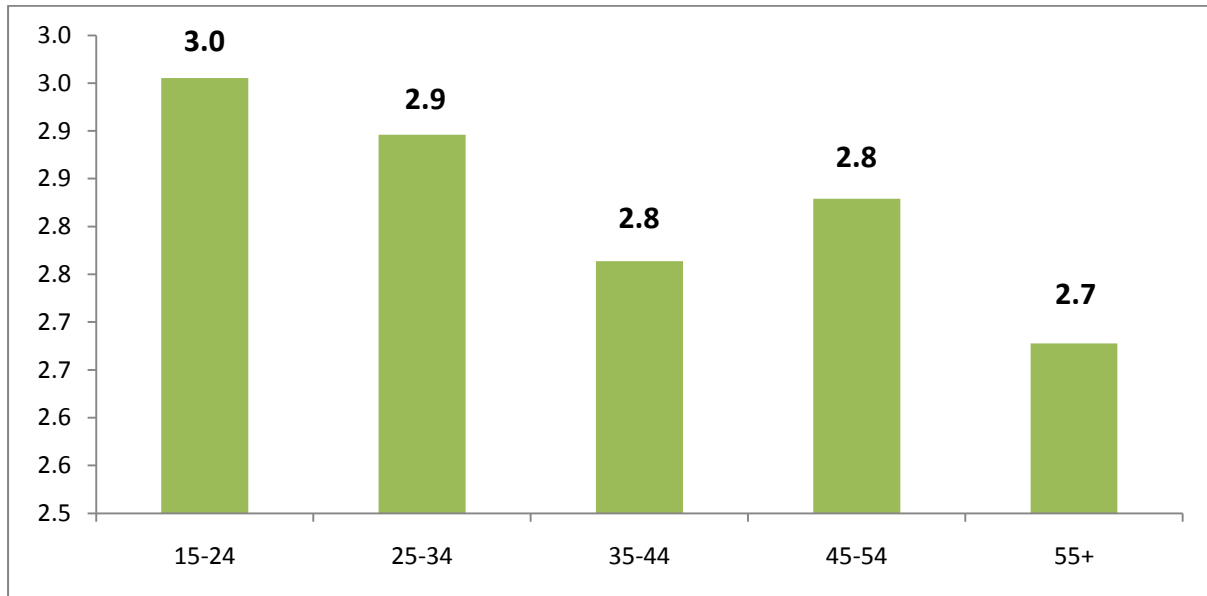


Figure 4: Younger consumers view more results per search

The average number of pages APAC consumers read through before performing another search or clicking on a link is 2.85. Younger consumers are likely to view more results per search than older consumers. The implication for marketers is that deeper levels of SEO that produce listings over multiple pages will enhance search performance, listings and awareness.

Q5 - Are you able to distinguish the paid search listings from the non-paid search listings in the search engine?

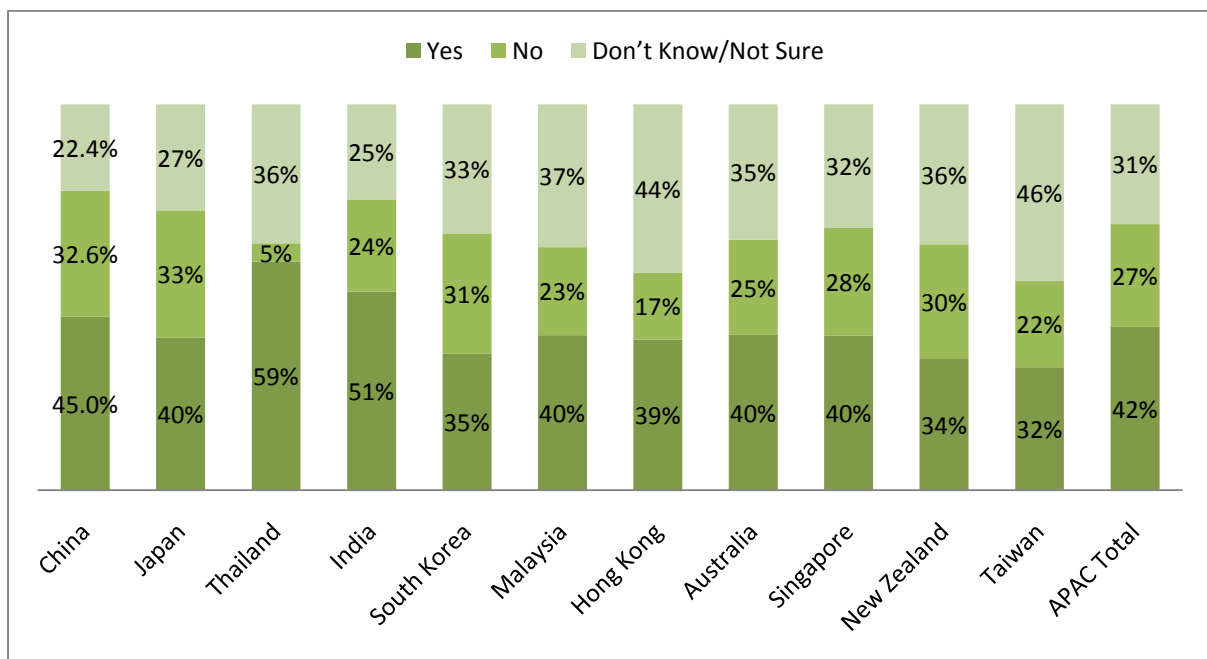


Figure 5: Most APAC consumers do not differentiate between paid and organic search results

The majority of APAC consumers (58%) cannot distinguish between organic and paid for search results. A third (31%) don't know or are not sure, indicating a lack of familiarity on the difference. Understanding and awareness of paid for search is higher in Thailand (59%) and India (51%). Marketers need to consider paid and organic search strategies as a single strategy so that listings dominate both paid and organic search results.

Q6 and Q7 APAC TOTAL: Do you agree with the following statements regarding the top PAID and NON PAID for search listings?

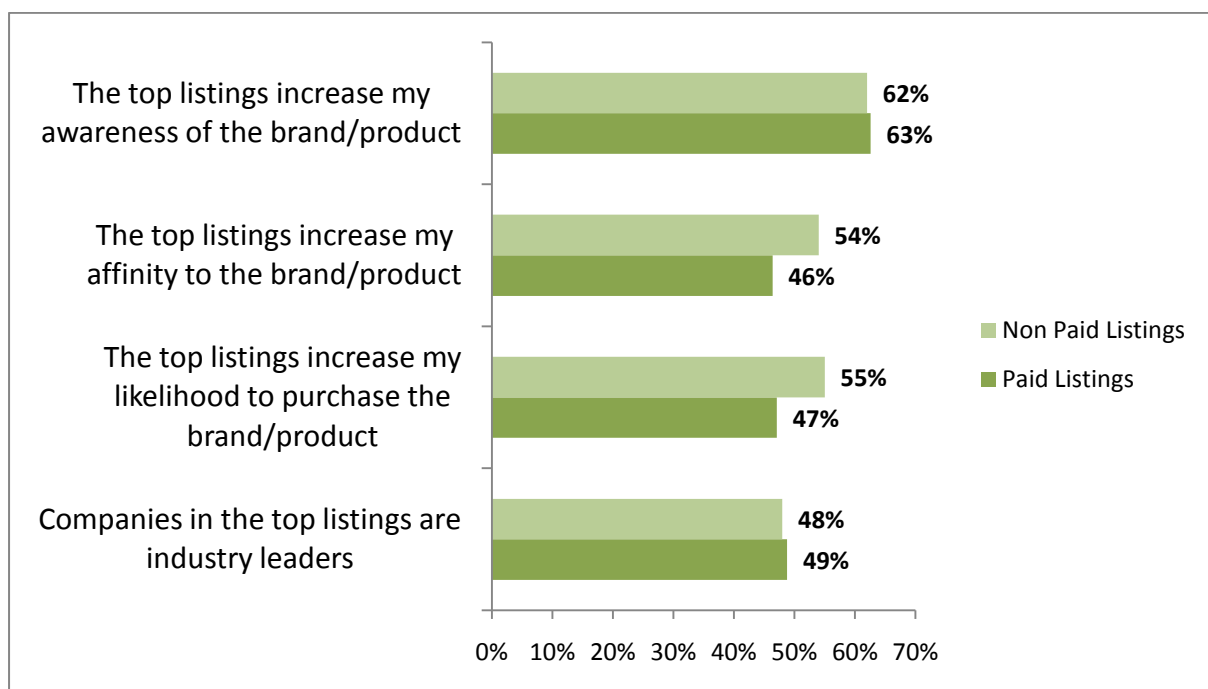


Figure 6: Both paid and organic search drive awareness

Whilst there is limited difference in consumer perceptions in terms of organic and paid for search building brand awareness, there is a marked difference in their perceived ability to build brand affinity and purchase intent. 54% of APAC respondents (aware of paid for search) believe organic listings increase their brand affinity, compared to 46% for paid for search. For purchase intent, 55% of respondents believe organic listings increase this, compared to 47% for paid for search.

Q8 - When you performed online searches through the search engines in the last 6 months, which of the following specific information did you search for?

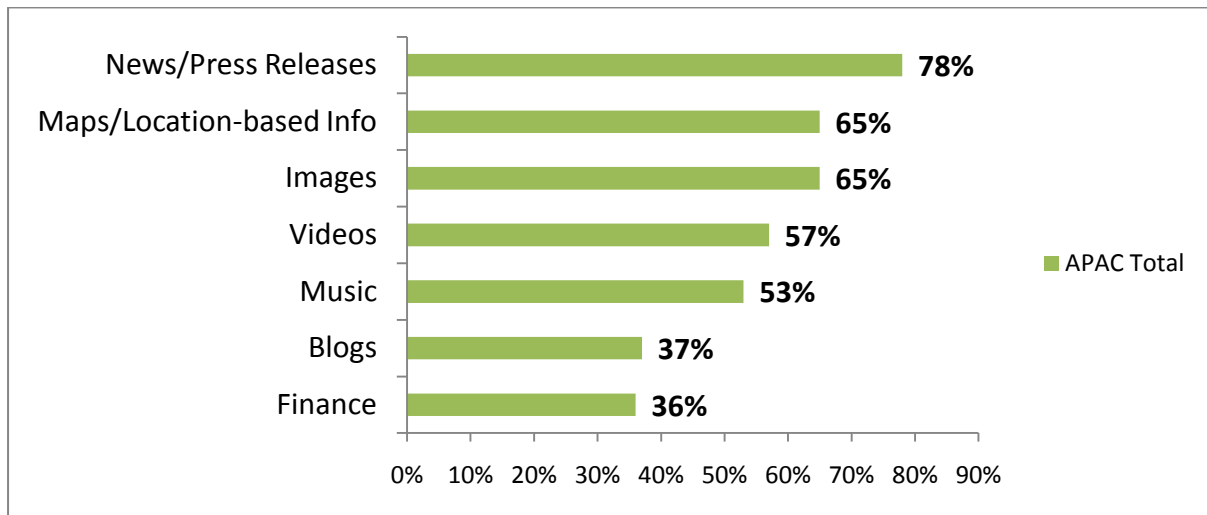
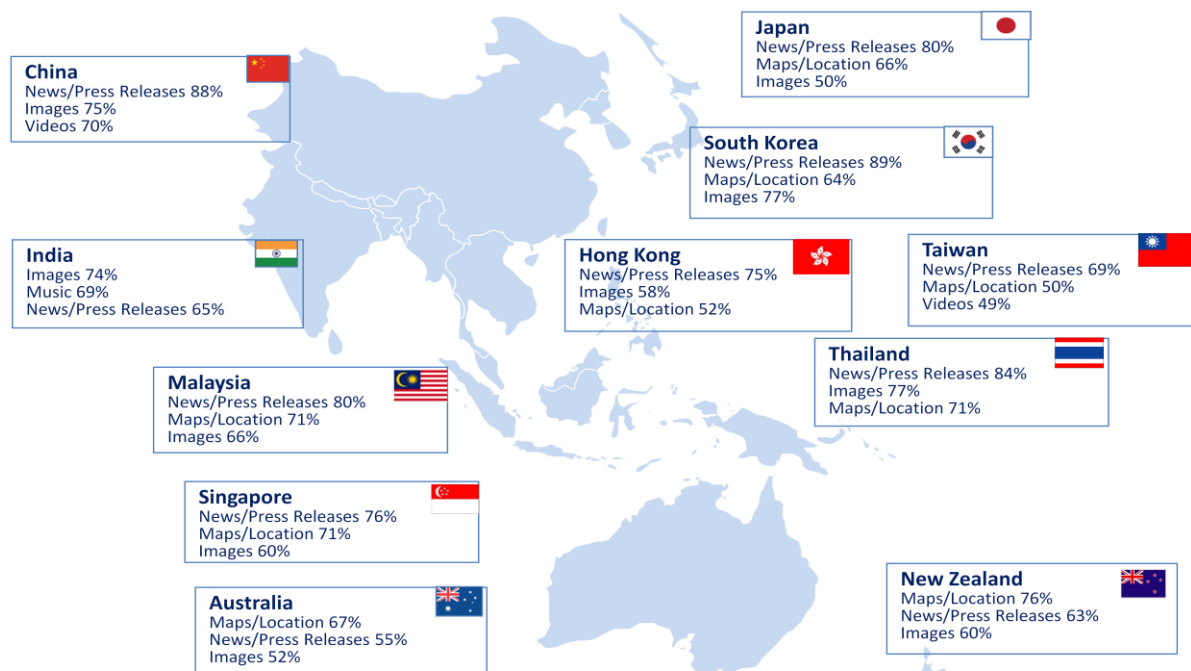


Figure 7: Consumers search for multiple media formats

The most popular type of content to search for is news/press releases (78%), whilst other content such as images (65%) and videos (57%) are close behind. Marketers should consider using a range of content to fit this behaviour. Advanced search techniques such as SLPR, content seeding, video & image optimisation and multivariate testing significantly improve search results as they address multiple content formats. Social media campaigns that include multiple media formats included above will perform more effectively. The map below shows the variation between markets:



Q8 When you performed online search through the search engines in the last 6 months, which of the following specific information did you search for (top 3 per country):

Source: iProspect APAC Consumer Search Behaviour & Attitudes Survey 2010
Base: All respondents

Figure 8: While differences by market exist, multiple formats are searched

Q9: In the past 6 months, which of the following prompted you to perform a search online to look for more information about a company, product, service or slogan?

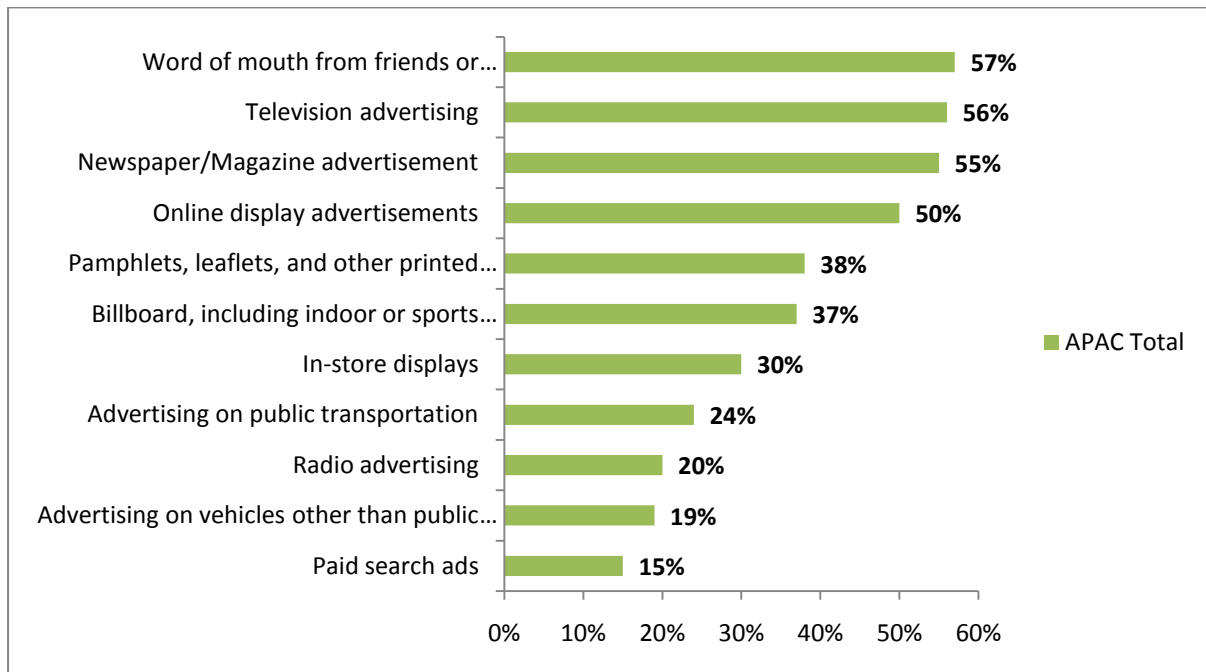


Figure 9: Search is driven by a variety of media sources

Word of mouth is the strongest prompt to online search. This word of mouth will take place both online and offline and so integrating search strategies into both social media and PR campaigns will benefit the brand. Also, integrate search with traditional media. Offline channels, primarily word of mouth, TV and print advertising, are the most significant prompts for online search. Online display advertising is also a powerful driver of search, with 50% of consumers searching as a result of exposure. These channels act as the stimulus for consumers to use search to find out more information about a company, product or service. Channels also differ by age with word of mouth and TV advertising being more important to younger audiences:

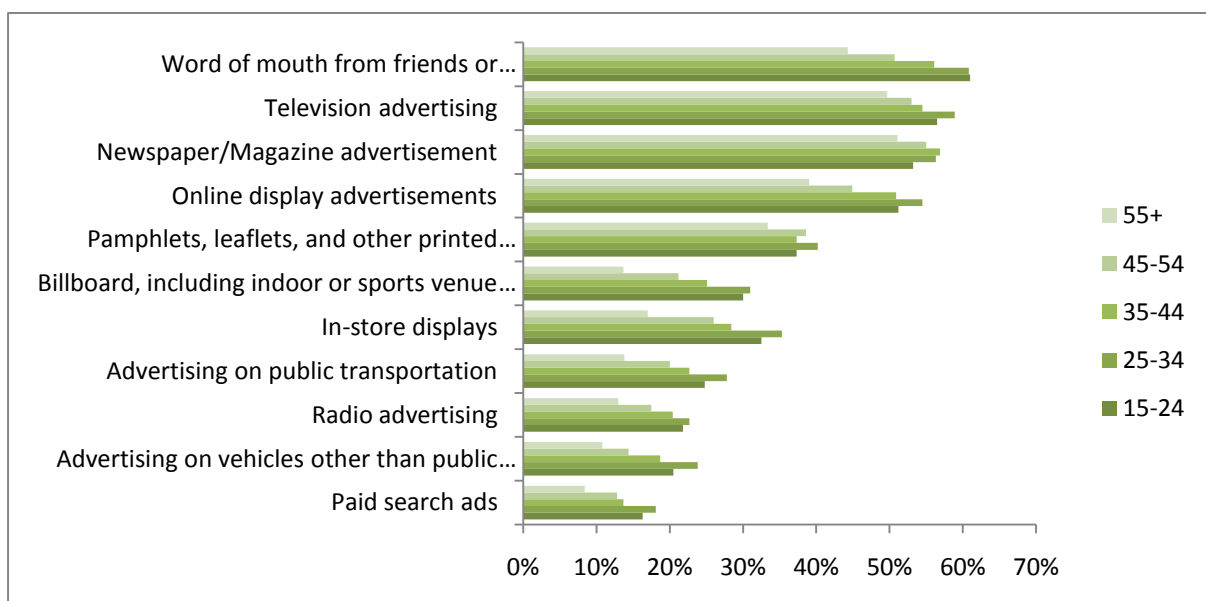


Figure 10: Younger consumers rely more on word of mouth and TV

Q10 - Which of the following materials have you searched for in the past 6 months?

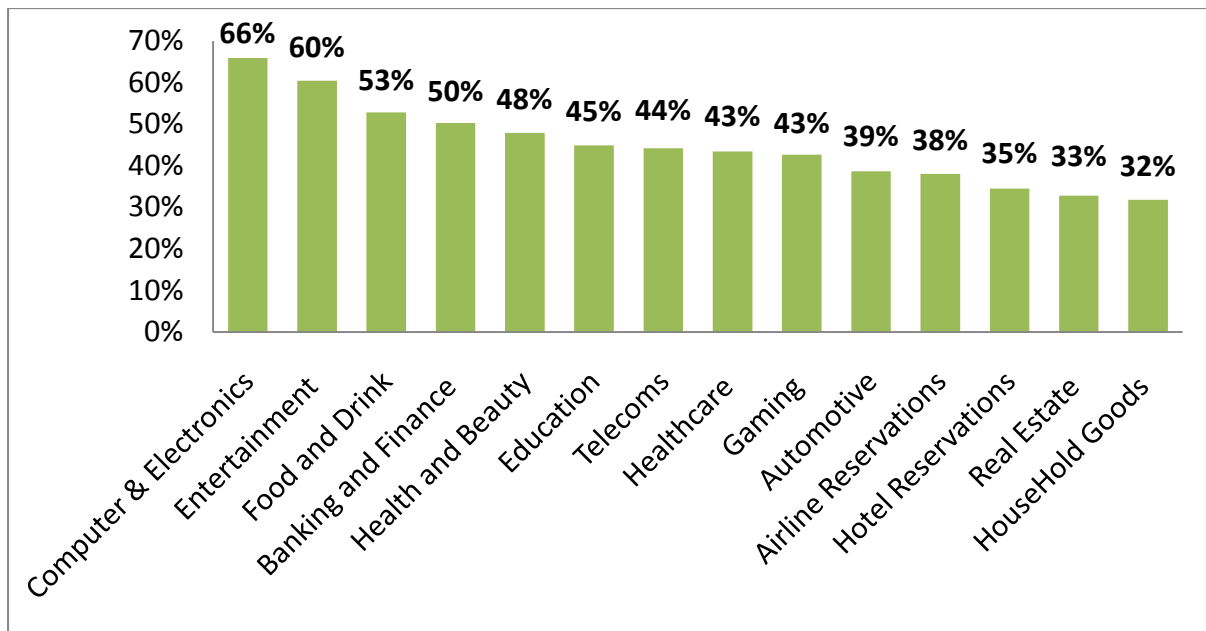


Figure 11: APAC Total shows search is use across many categories during the purchase process

The most popular and frequently searched for category is Consumer & Electronics, followed by Entertainment. However, search is used across a wide range of categories, from Healthcare (43%), Automotive (39%) and Household Goods (32%).

In Computer & Electronics, the majority of searches are conducted to compare prices and product features (86%); whilst initial information gathering (65%) also receives a high level of search. This pattern is reflected in the Entertainment category, where price/product comparison (65%) and initial information gathering (62%) are used at similar levels.

Search is also used in both categories once a product has been selected and consumers are about to make a purchase, however this occurs at a much lower level (33% Consumer & Electronics; 35% Entertainment) than initial research and comparison.

Category search behaviour varies across markets:

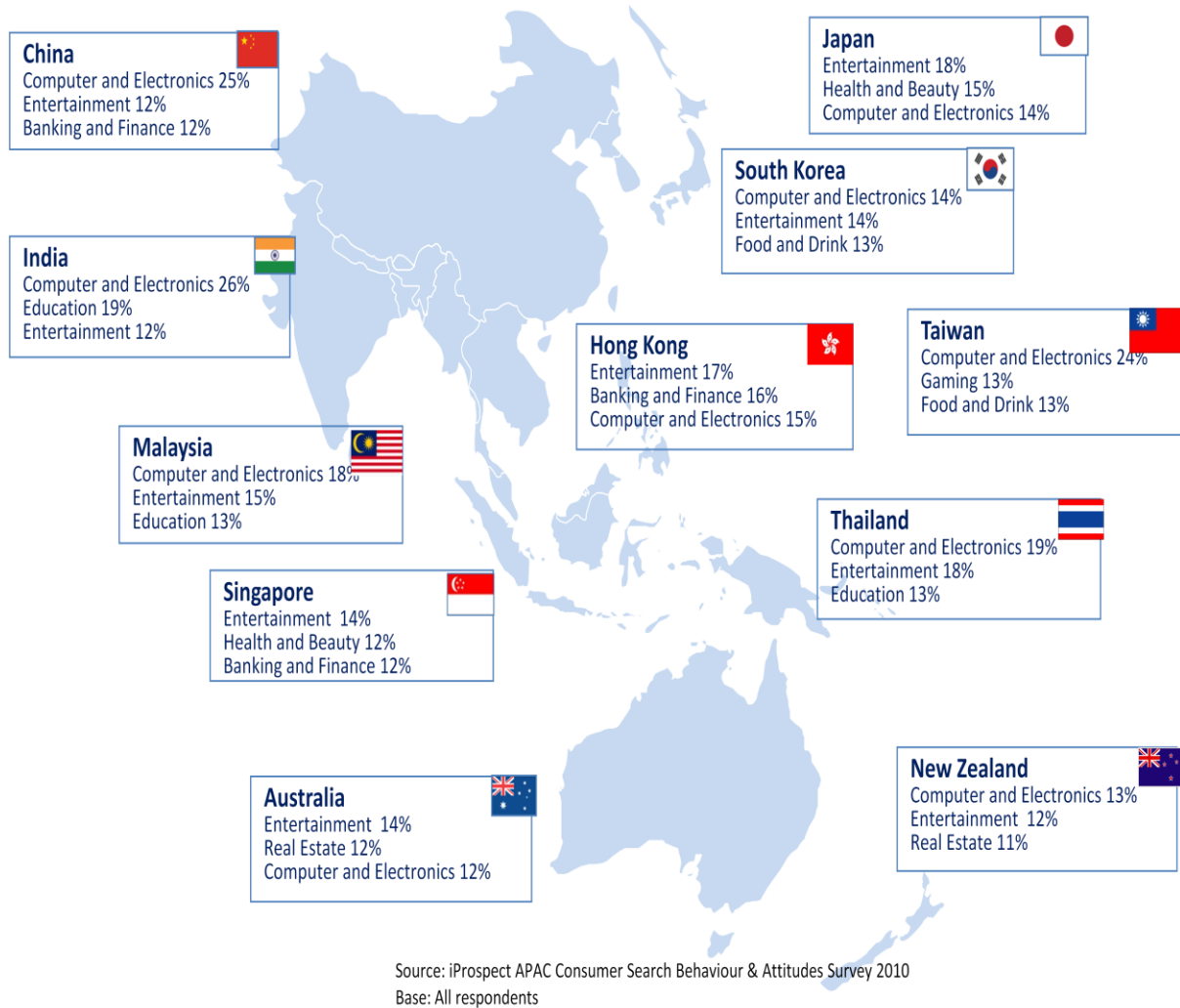


Figure 12: Search is essential for some categories

Q11 - Of all the materials that you search for, which area have you searched most frequently? (APAC Total)

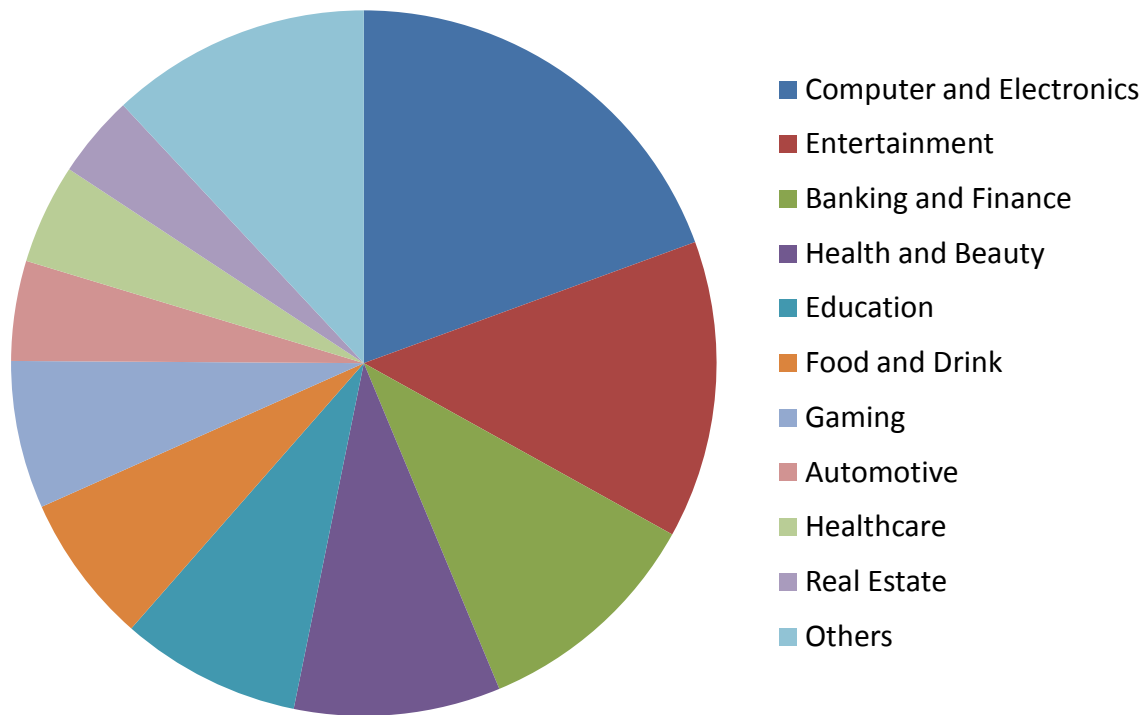


Figure 13

Q14 - Please indicate to what extent you agree/disagree with the following statement:

“I have not performed any search using a mobile phone in the last year”



Figure 14: Mobile search is a mainstream behaviour

Only 21% of APAC consumers have not used mobile search in the last year. Australia and New Zealand stand out as markets where behaviour significantly differs from the rest of the region in terms of mobile search behaviour, with 61% of respondents in both markets claiming they have not performed a mobile search in the last year. This has important implications as to how advertising copy is written for mobile search and the requirement for web content that is built for mobile browsing.

Q14 - Please indicate to what extent you agree/disagree with the following statement:
“Over the last year, performing searches using my mobile phone has become more important in my use of mobile internet.”

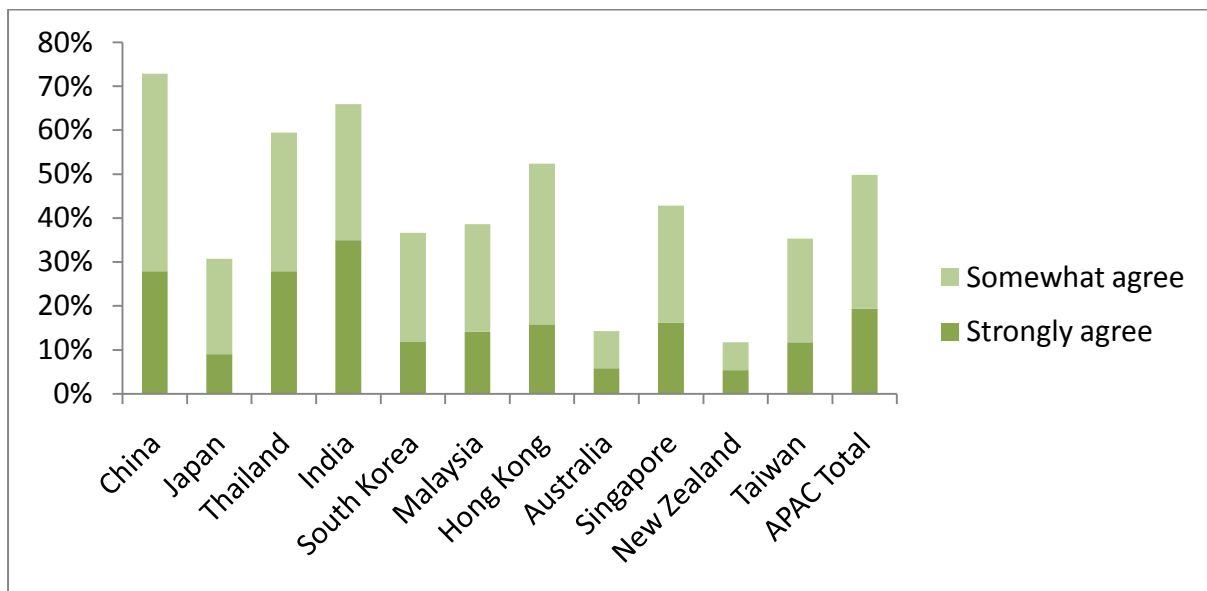


Figure 15: Mobile search will continue to grow

50% of APAC consumers agree that over the last year, performing searches using their mobile phone has become more important in their use of mobile internet.

The implications are particularly important for Indian and Chinese consumers. Only 7% of Chinese consumers have not performed any mobile search in the last year with 73% of Chinese consumers agree that mobile search has become more important in their use of mobile internet. Only 10% of Indian consumers have not performed any mobile search in the last year. 66% of Indian consumers agree that mobile search has become more important in their use of mobile internet. It is likely that primary access to the web will be via mobile devices as opposed to desktop or laptop computers.

The research is available by market and search category. For further information contact:

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