

# THE FUTURE OF PAID SEARCH

Google, Bing & beyond

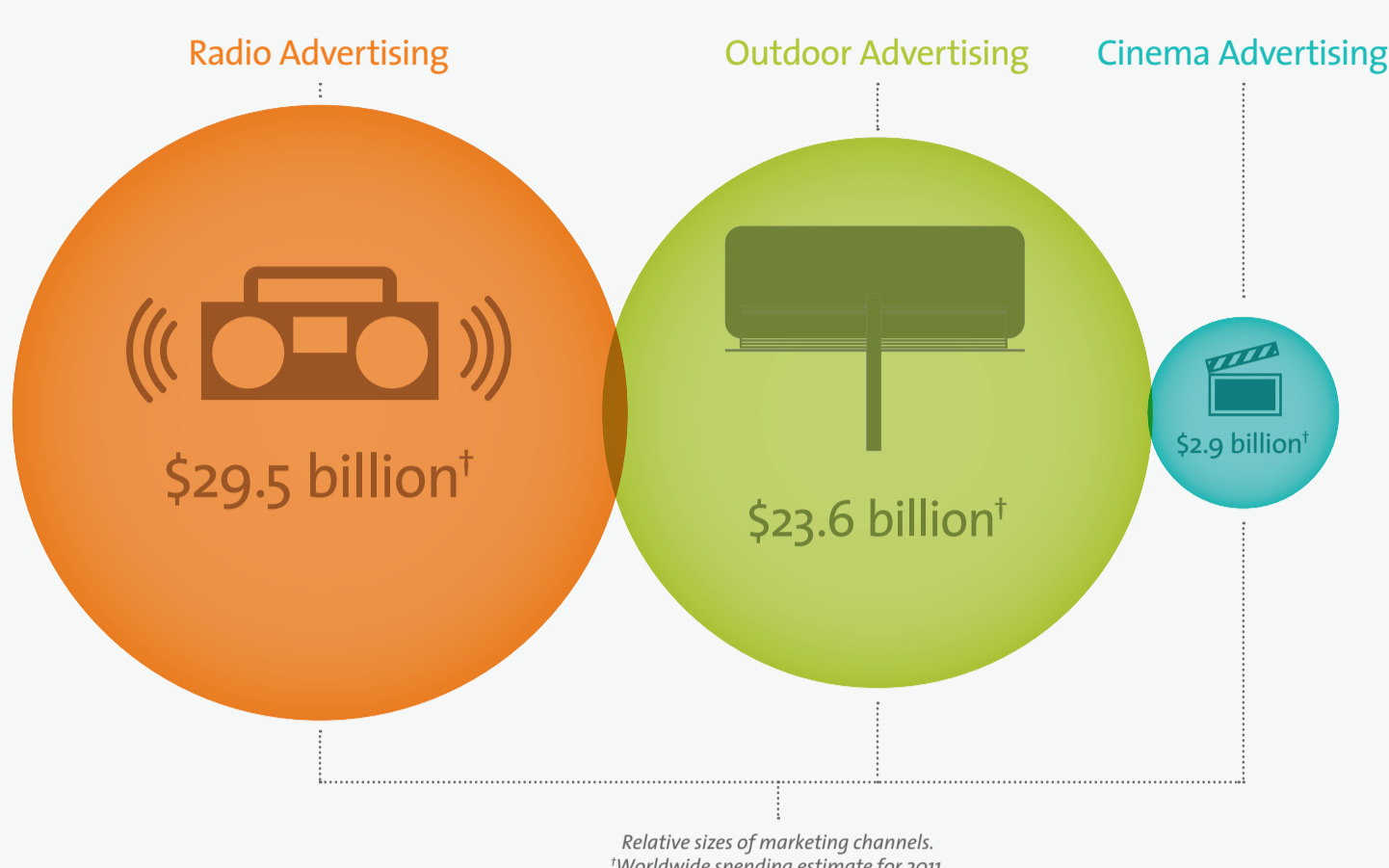


Paid search has cemented itself as a highly viable, cost effective marketing channel. In 2011, paid search spending is expected to reach \$34 billion. In this graphic, we'll briefly explore paid search—it's current state, where it's going, and how the largest paid search vendors (Google & Bing) have divvied up the market.

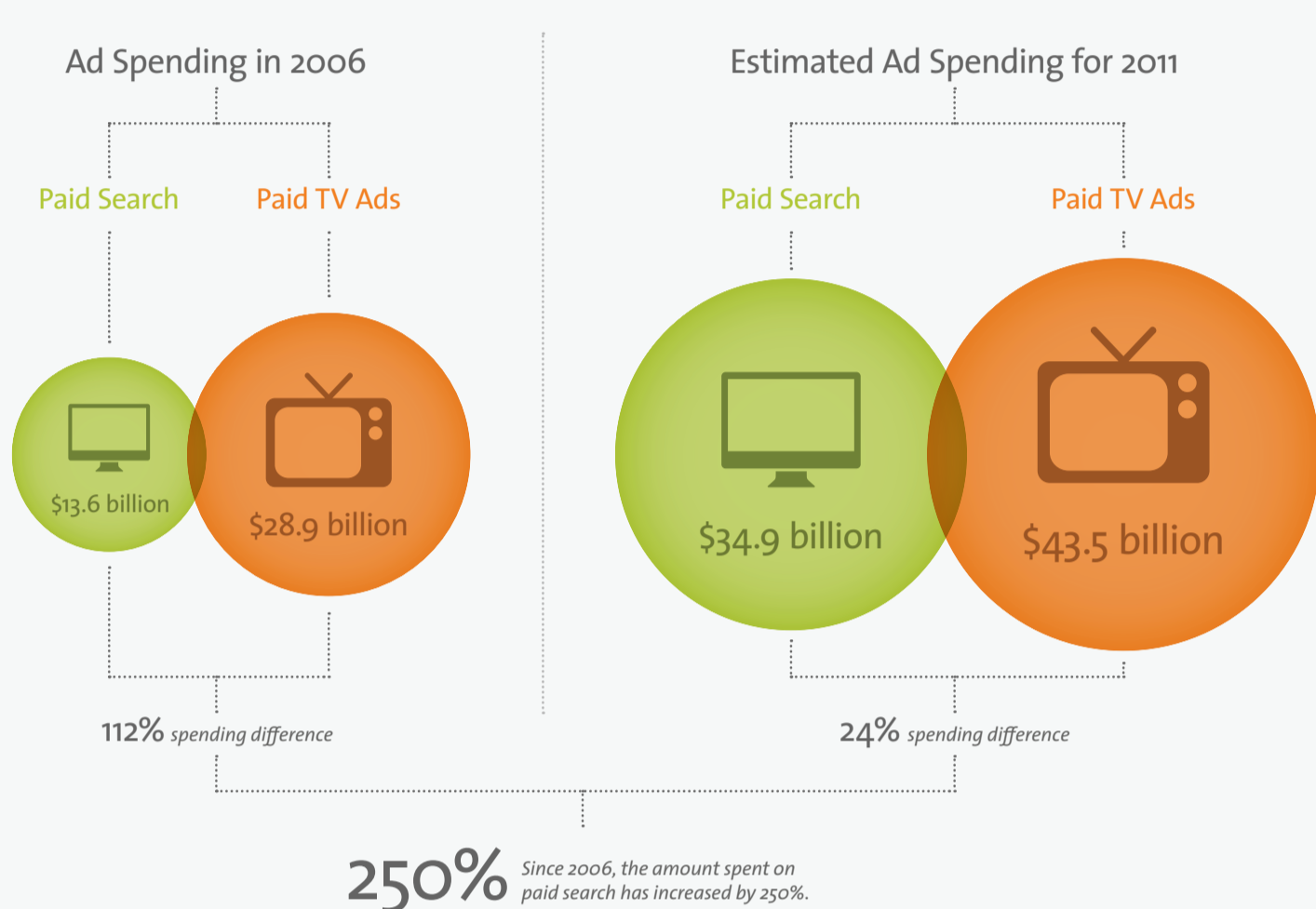
## Worldwide, Paid Search is a \$34 Billion Industry\*

\*Estimate of worldwide paid search spending for 2011

### PAID SEARCH IS BIGGER THAN ...



### THE AMOUNT SPENT ON SEARCH MARKETING IS GAINING ON PAID TV ADVERTISING



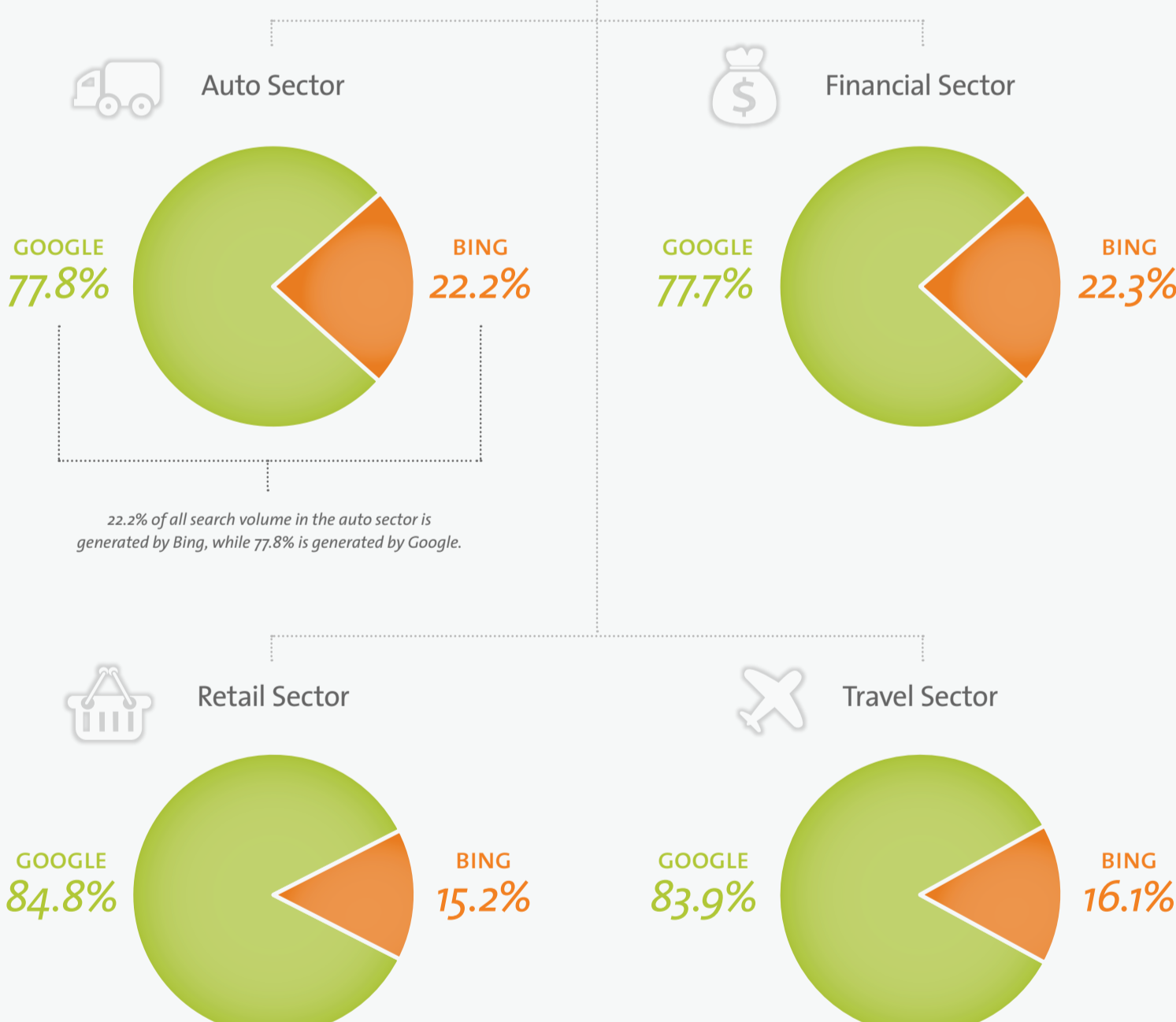
### BY 2016, PAID SEARCH IS EXPECTED TO GROW BY 75% TO BECOME A \$61.1 BILLION INDUSTRY

## Google vs. Bing — how do they compare?

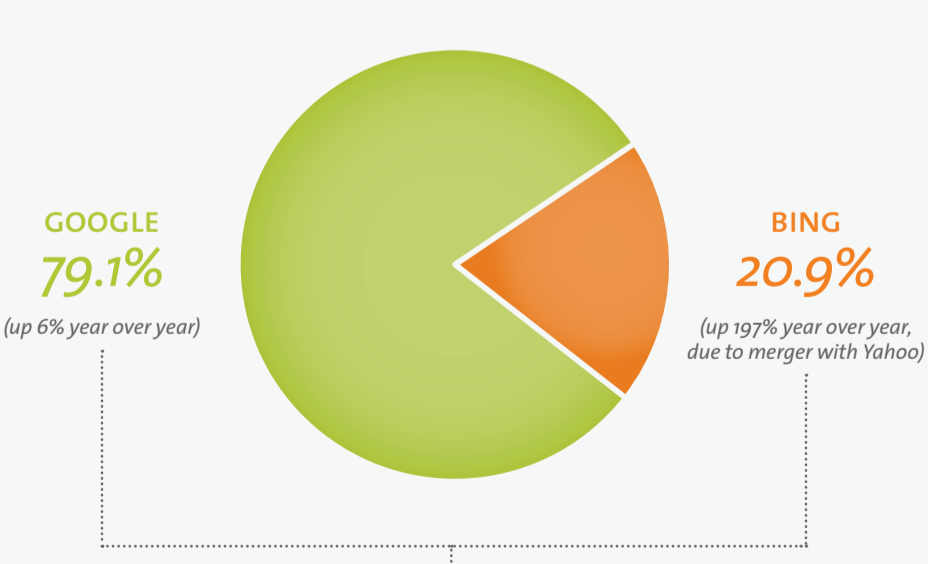
### COMPARING GOOGLE & BING

(Quarter 1, 2011)

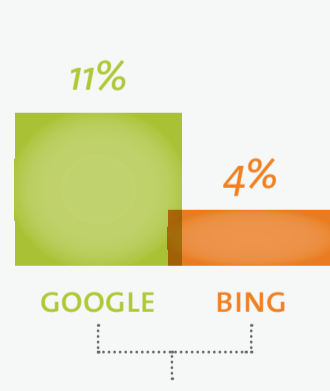
#### Search Volume Market Share



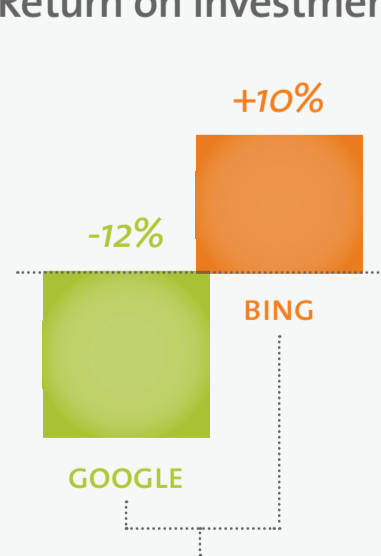
#### Paid Search Market Share



#### Click Cost Increase



#### Return on Investment



#### In Summary

While Google's undeniably large market share looms above Bing, trends show that Bing is on the rise. If Bing can succeed in expanding their network while keeping click costs down and ROI up relative to Google, they could prove to be a serious paid search contender in the coming years.



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efrontier.com  
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