

THE FUTURE OF PAID SEARCH

Google, Bing & beyond

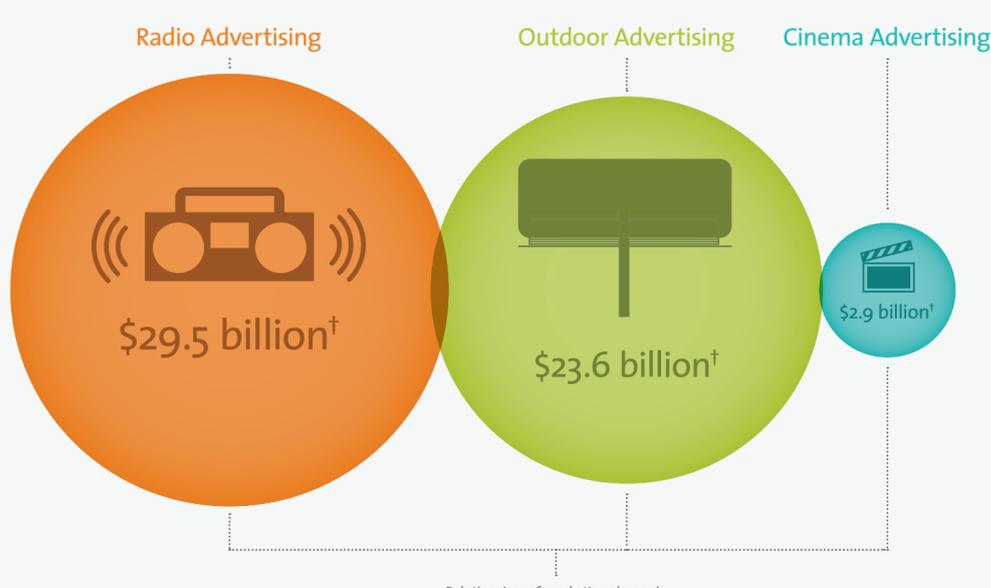


Paid search has cemented itself as a highly viable, cost effective marketing channel. In 2011, paid search spending is expected to reach \$34 billion. In this graphic, we'll briefly explore paid search—it's current state, where it's going, and how the largest paid search venders (Google & Bing) have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

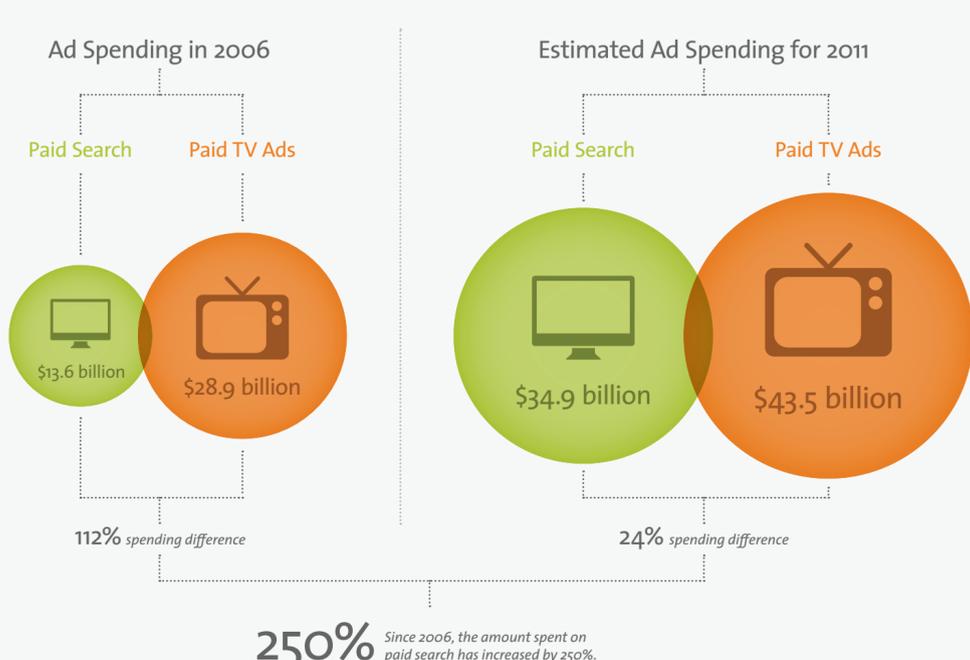
Worldwide, Paid Search is a \$34 Billion Industry*

*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



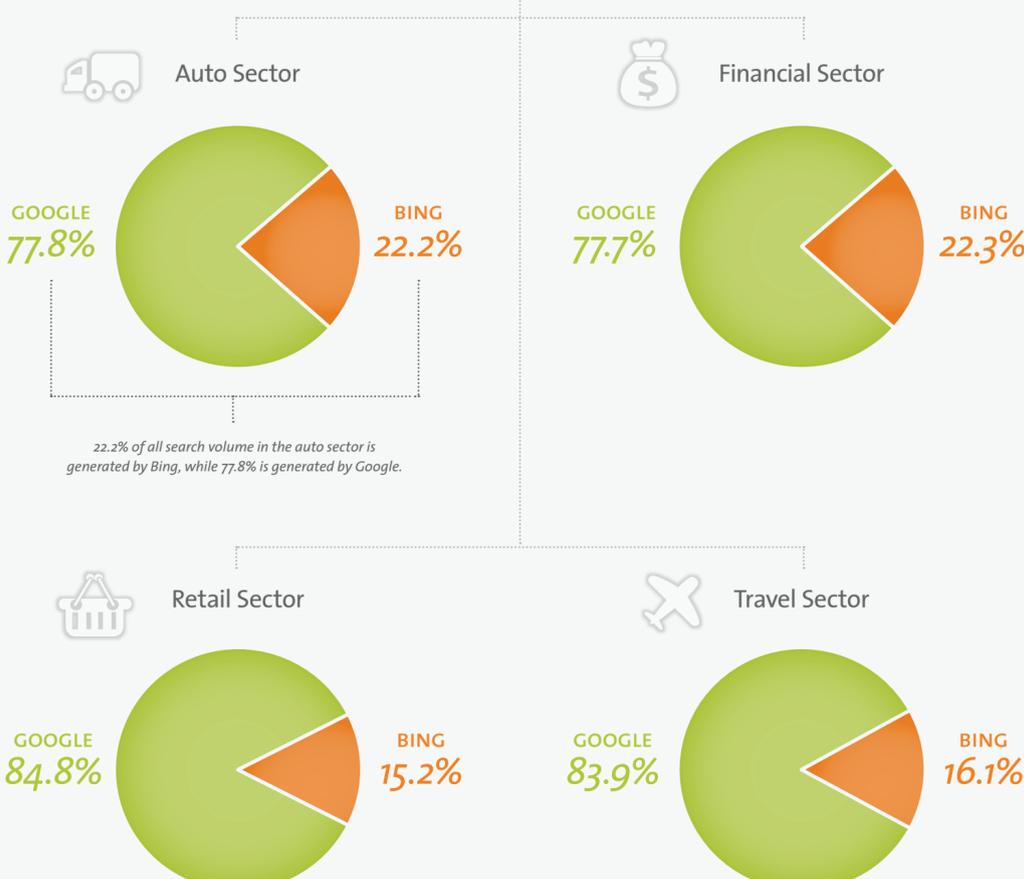
BY 2016, PAID SEARCH IS EXPECTED TO GROW BY 75% TO BECOME A \$61.1 BILLION INDUSTRY

Google vs. Bing — how do they compare?

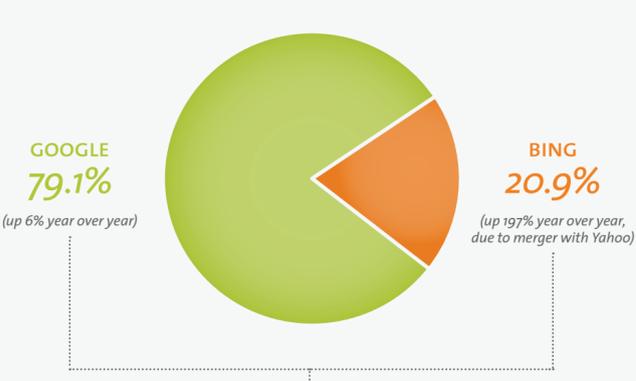
COMPARING GOOGLE & BING

(Quarter 1, 2011)

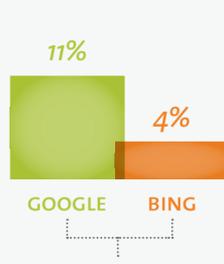
Search Volume Market Share



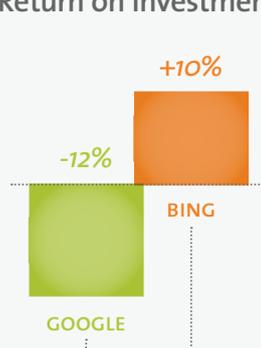
Paid Search Market Share



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.



SOURCES

efrontier.com
magnaglobal.com

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