

TV IMPACT ON SEARCH

*Analysis on how search
reacts to TV campaigns*

Hamburg, September 2015



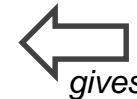
RESOLUTIONS dentsu
AEGIS
network

How, when and where do consumers search in reaction to push advertising?

ADVERTISER
plans a campaign



REACTION
to campaign



CONSUMER
exposed to campaign



AWARENESS

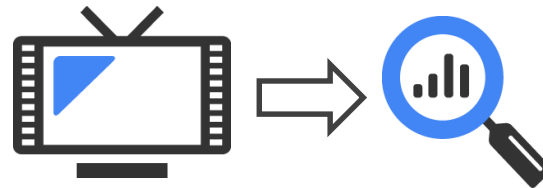
INTEREST

DESIRE

ACTION



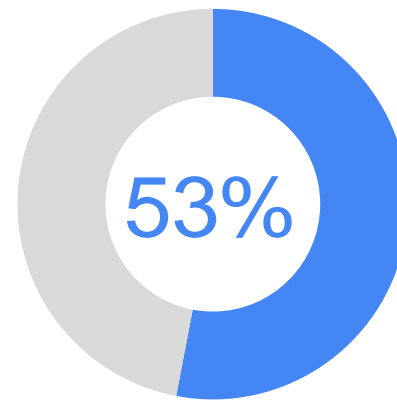
for example



Background

Simultaneous usage of offline and online media.

- Media usage has changed: rather than remaining entirely focussed on one medium, today's audience tends to use different media channels in parallel
- This phenomenon got accelerated through the rise of mobile devices such as smartphones or tablets, which are often used alongside other activities
- The prime example of this is parallel usage of online to TV:



5 out of 10
Internet users
in Germany
go online
in parallel to
watching TV

BASE: Total Internet users in Germany (n = 829 respondents)



Methodology

We estimate the impact of TV on search by analysing an interval of 10 minutes around the airing of an individual spot. The difference in related searches between 5 minutes POST vs. 5 minutes PRE is attributed to TV.

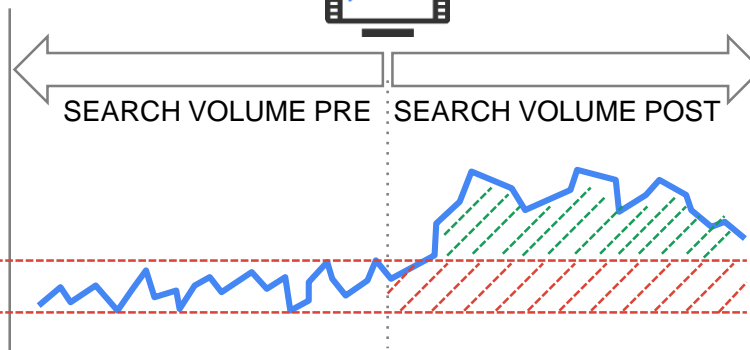
EXAMPLE



SPOT ON AIR



“search volume if there had been no spot on air”



“search volume caused by the airing of the spot”

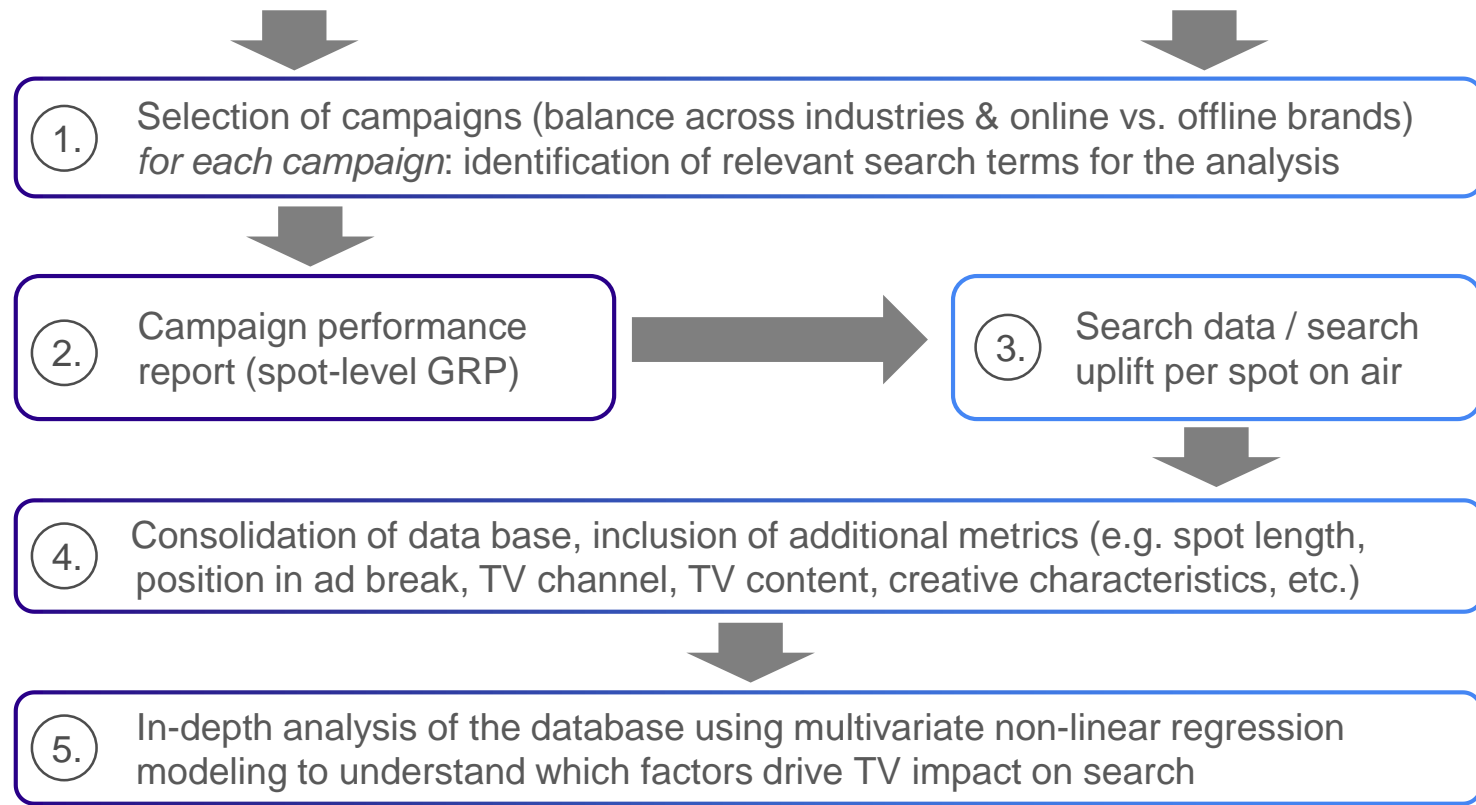
TV ON SEARCH

COUNTERFACTUAL

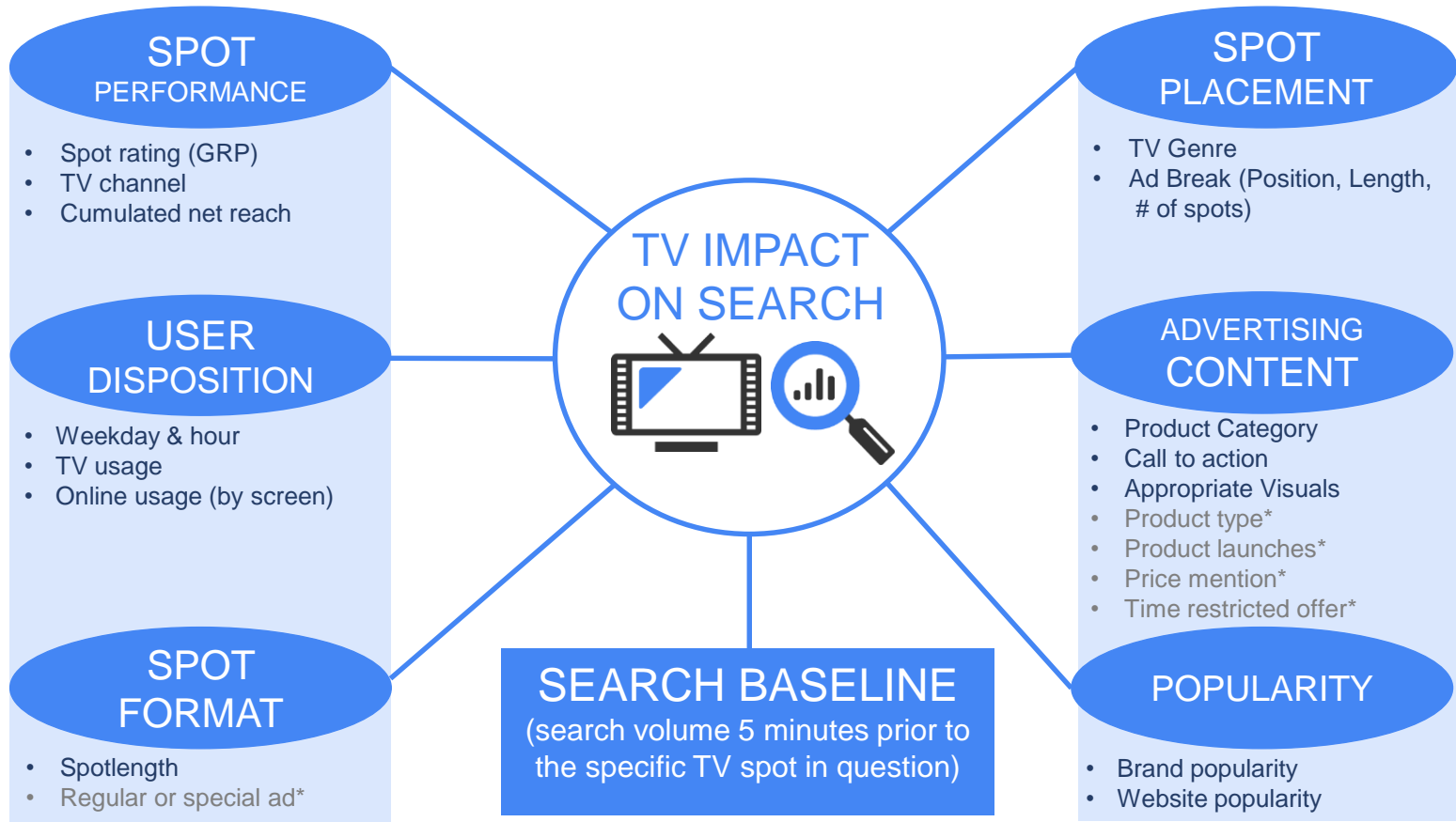
To understand *how* TV drives search we partnered with DentsuAegis Resolutions

RESOLUTIONS dentsu
AEGIS
network

Google



Driver analysis: (potential) search uplift factors included in the modelling



* considered but no significant contribution



Our database

66

brands

106,790

airings of
TV spots

156

TV copies

10

product
categories

22

TV channels

98

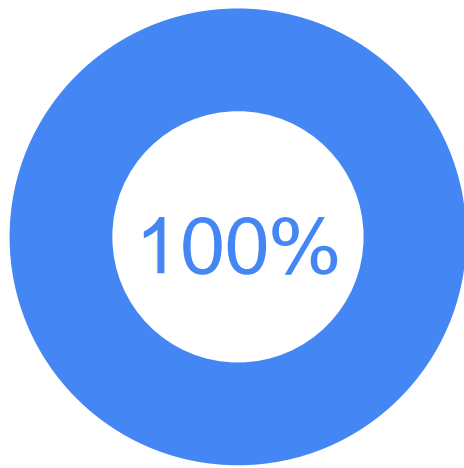
products



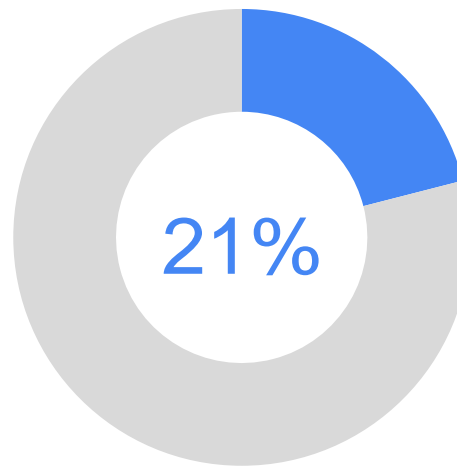
Consumers *always* search in reaction to TV. But the reaction varies. A lot.

In our experience, search *always* reacts to TV:

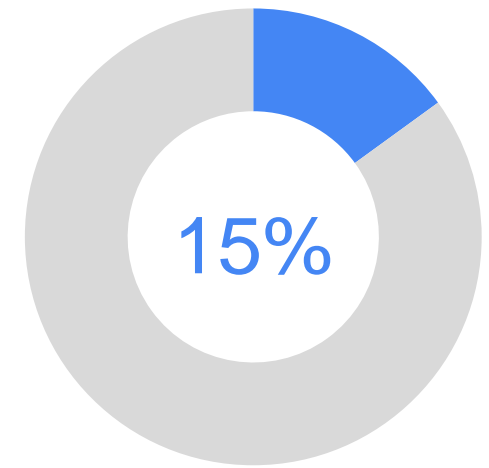
We observed a positive uplift in queries for every single one of the 98 campaigns.
However, we observed a massive variation in uplift strength.



% of campaigns that caused incremental search volume



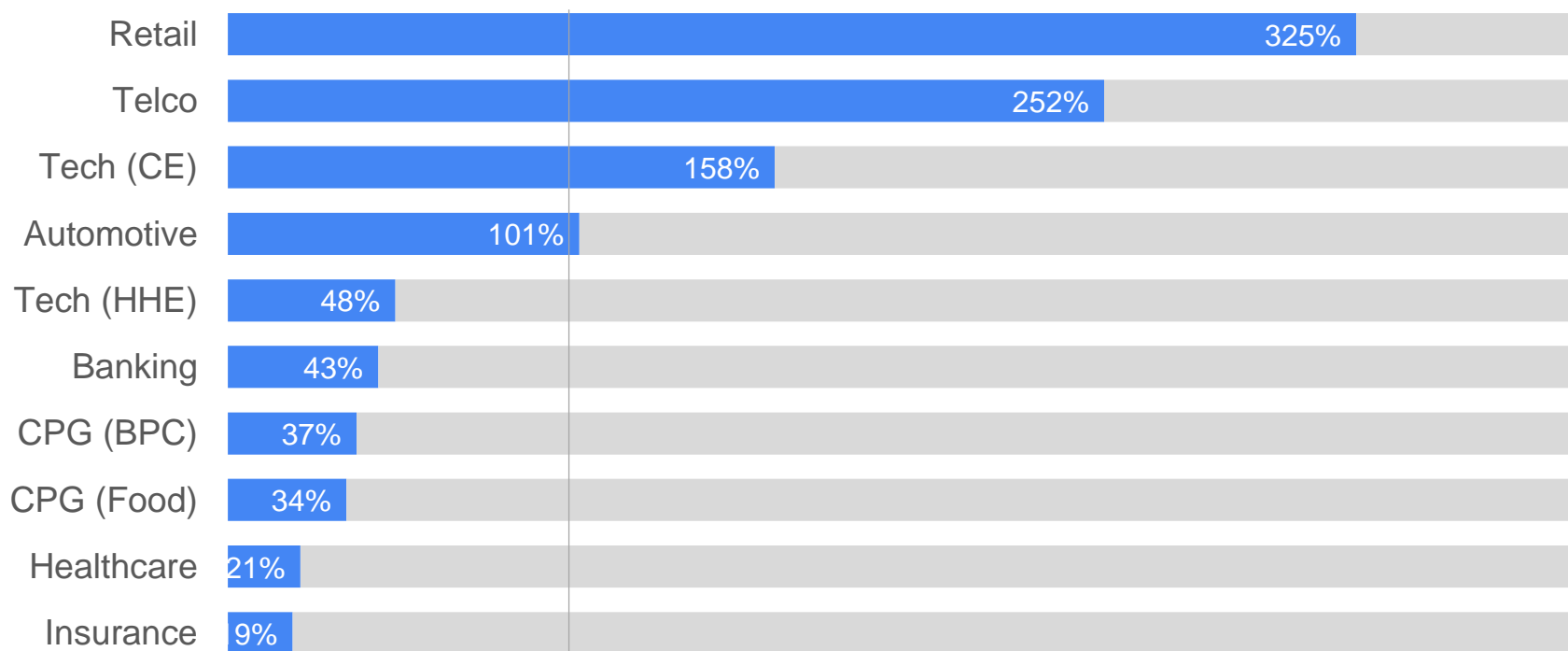
% of campaigns where search uplift was < 10,000



% of campaigns where search uplift was > 100,000

Search uplift by industry

Search uplift is not equally strong across industries. Retail, Telco and Tech (CE) stand out – corresponding to distribution of general search interest.



average absolute search uplift
across categories = 100%

TV impact on search varies strongly.

Example 1: Automotive campaigns

Variation in results despite similar category and GRP level.

Main difference between both campaigns: baseline search volume.

TV campaign:

580 GRP

Base search volume:

9.5 million

TV impact on search:

165,000 queries

1.7% relative uplift



TV campaign:

735 GRP

Base search volume:

975,000

TV impact on search:

97,000 queries

10.0% relative uplift



TV impact on search varies strongly.

Example 2: Food campaigns

Variation in results despite similar category and base volume.

Main difference between both campaigns: GRP levels.

TV campaign:

1,300 GRP

Base search volume:

540,000

TV impact on search:

28,600 queries

5.3% relative uplift



TV campaign:

650 GRP

Base search volume:

310,000

TV impact on search:

9,200 queries

3.0% relative uplift



Average impact of TV on search

Search uplift from TV varies by GRP and base search levels.

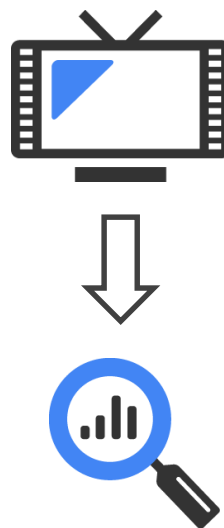
On average across 98 campaigns we observed an uplift of...

Ø ACROSS 98 CAMPAIGNS

9,125

incremental queries per

100 GRP



Ø ACROSS 98 CAMPAIGNS

4.2%

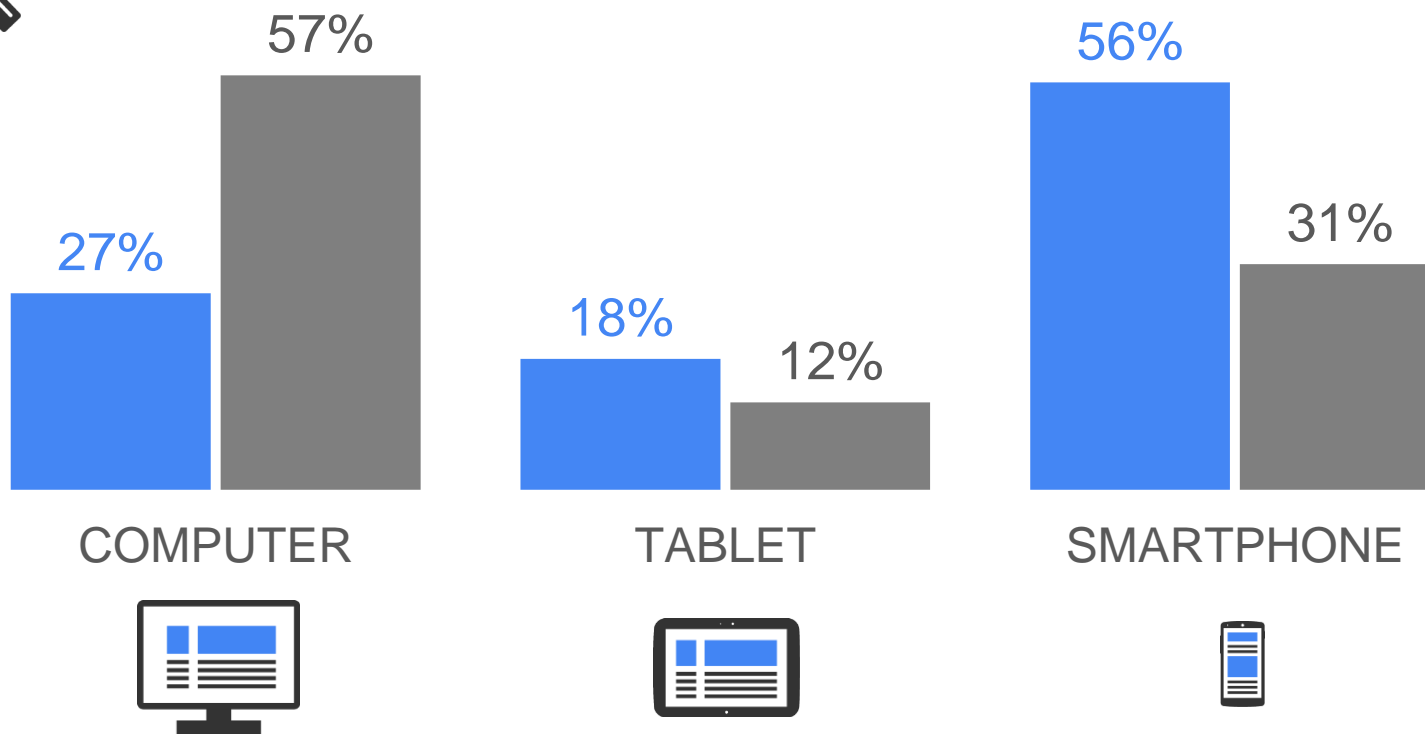
UPLIFT RELATIVE TO
BASELINE
SEARCH VOLUME



More than half of queries triggered by TV happen on a smartphone



- TV induced searches (share by screen)
- Baseline searches (share by screen)



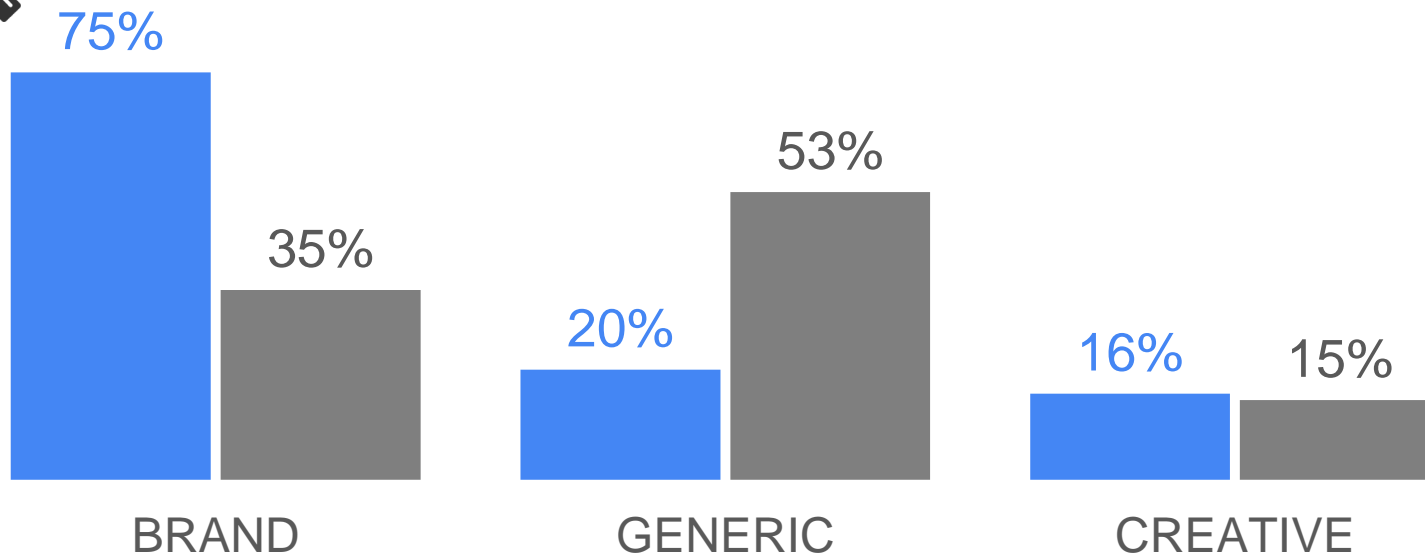
SOURCES:

- DentsuAegis Resolutions (TV campaign data)
- Google (search volume data)
- 98 campaigns from 2014 / 2015

3 in 4 queries triggered by TV refer to the advertised brand



- TV induced searches (share by type of keyword)
- Baseline searches (share by type of keyword)



SHARE OF QUERIES CONTAINING AT LEAST ONE ... SEARCH TERM



Driver analysis: interactions between factors that influence TV impact on search

Some general “rules of thumb” about the TV impact on search can easily be deducted from looking at a large set of TV campaigns and their effects:

- More GRP = higher search uplift, on average: 100 GRP = 9,125 incremental searches
- Higher baseline search volume = higher search uplift, on average: 4.2% of baseline
- TV impact on search mainly happens on mobile
- TV impact on search mainly triggers brand queries
- TV advertisers should thus uncap *at least* their brand campaigns across screens in parallel to TV and even think of running dedicated synchronized search campaigns

While these general observations are already valuable, they do not explain what triggers a weak or strong effect in the case of an *individual* campaign.

Drivers of TV impact on search (spot level analysis)

We found five main factors that influence the impact of TV on search:

SEARCH UPLIFT FROM TV

CREATIVE LANGUAGE: 4%

TV GENRE: 8%

CATEGORY & POPULARITY: 16%

AD PRESSURE (GRP): 21%

(interacts with campaign parameters: timing,
channel, spotlength, net reach, ad break specs)

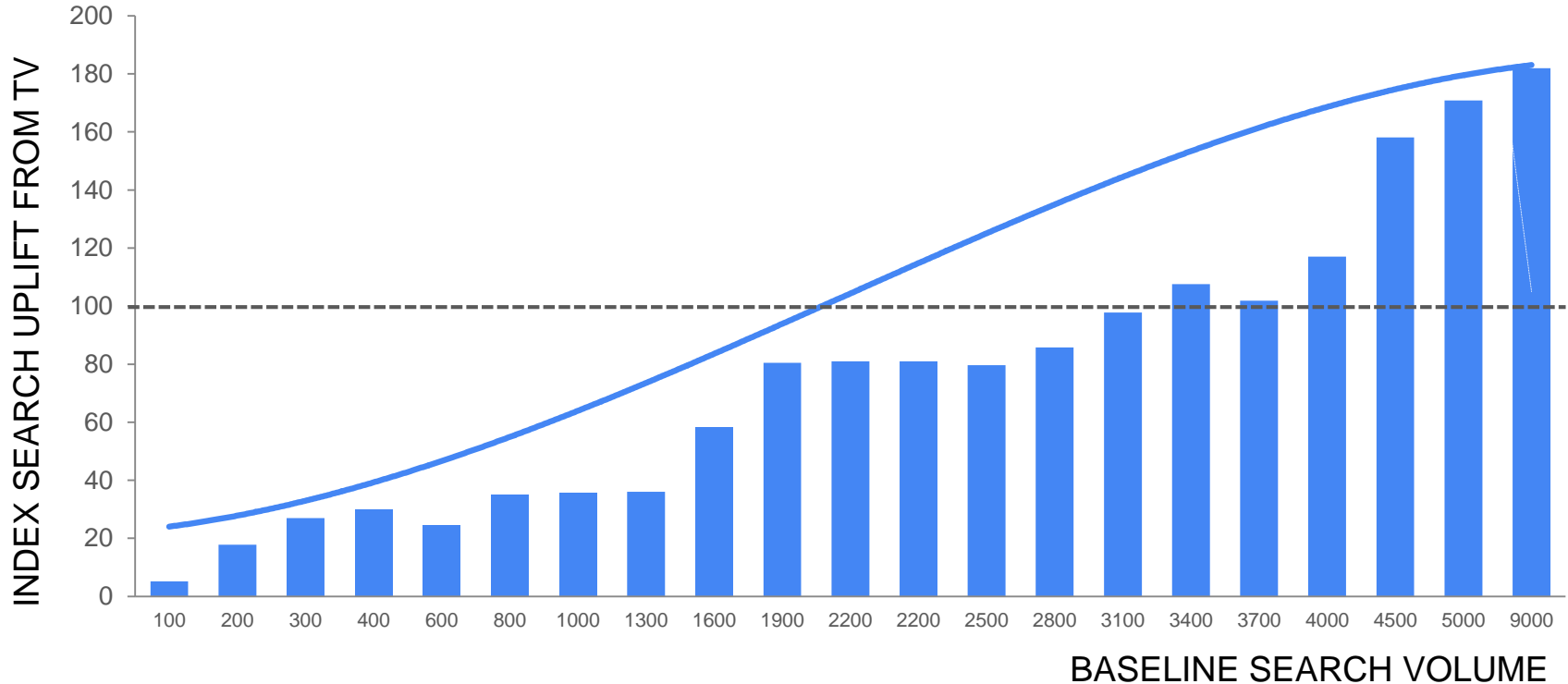
BASE SEARCH VOLUME: 51%



Search uplift by baseline search volume

(ceteris paribus condition: if all other drivers remained equal)

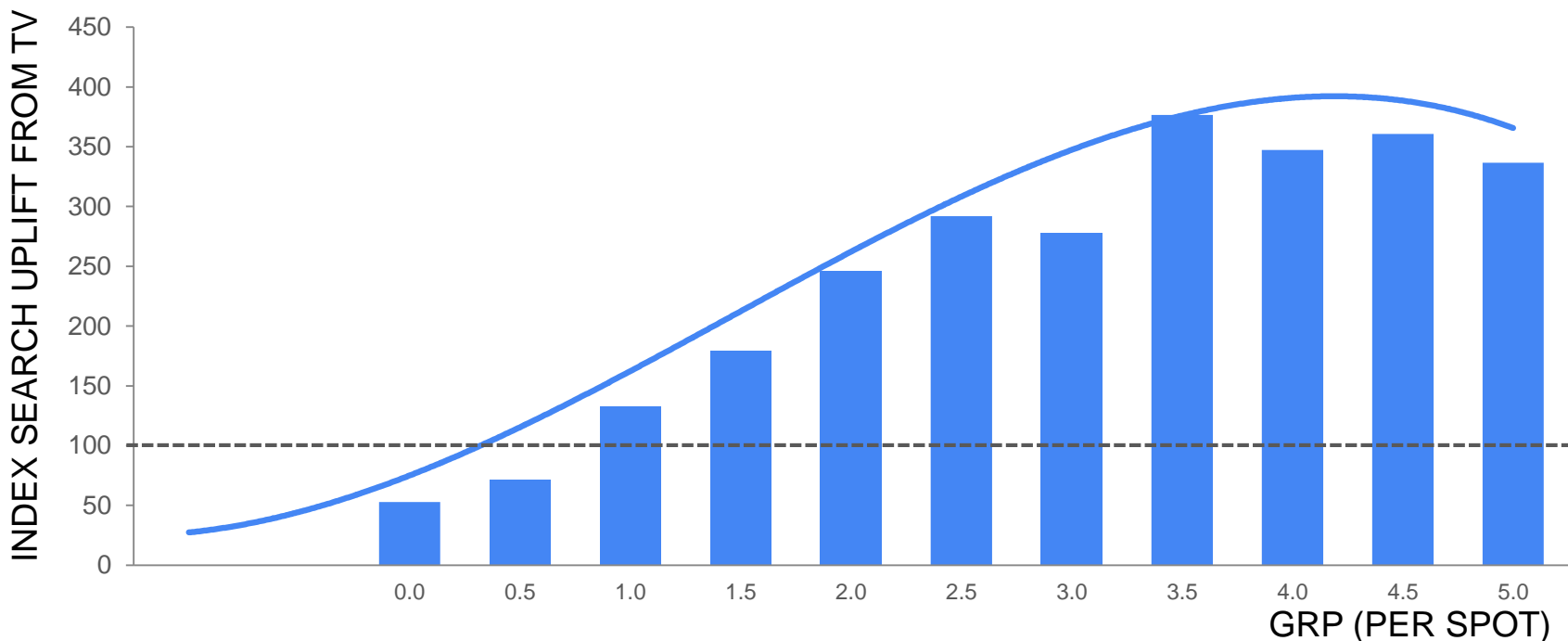
Higher baseline search volume leads to higher search uplift: the higher the general interest in a topic, the bigger the effect.



Search uplift by GRP

(ceteris paribus condition: if all other drivers remained equal)

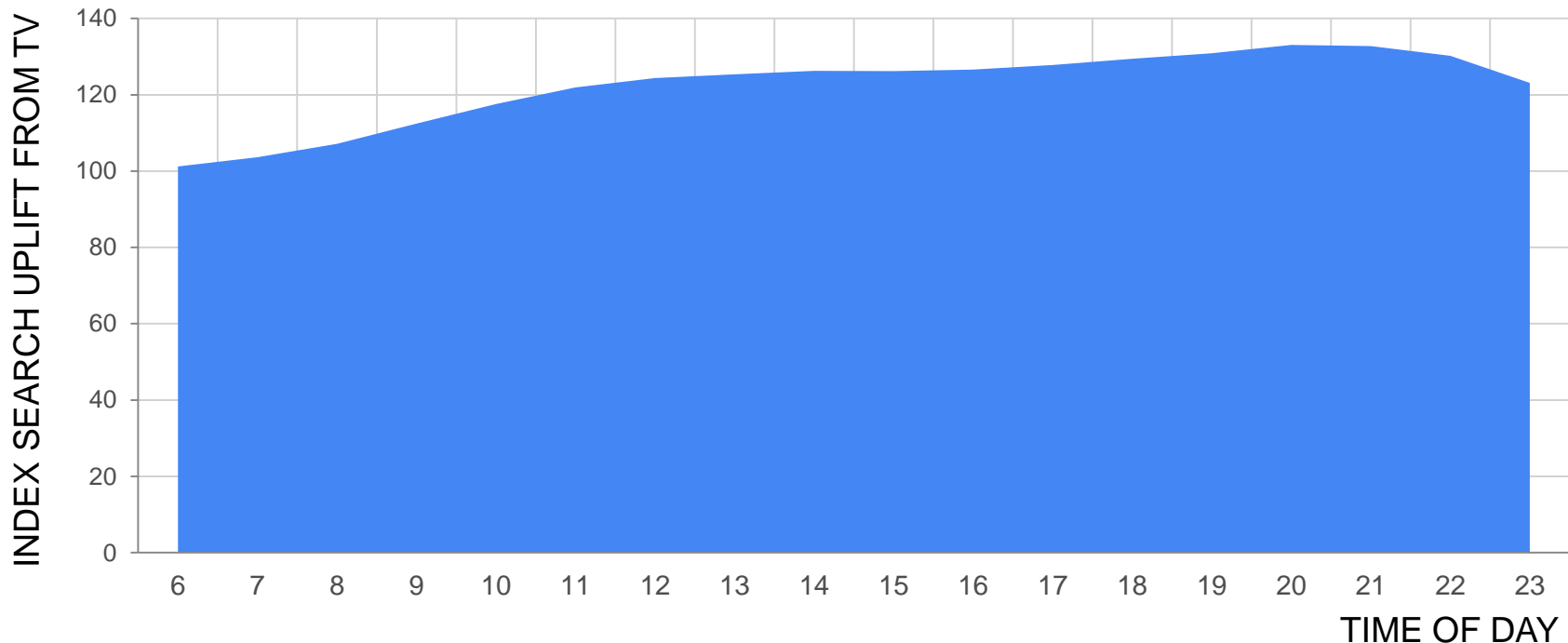
Higher GRP lead to greater impact, but with a saturation after 4 GRP per spot. As high GRPs per spot indicate a high audience involvement with the program it can be assumed that the audience will be less open to parallel media usage.



Search uplift by time of day

(ceteris paribus condition: if all other drivers remained equal)

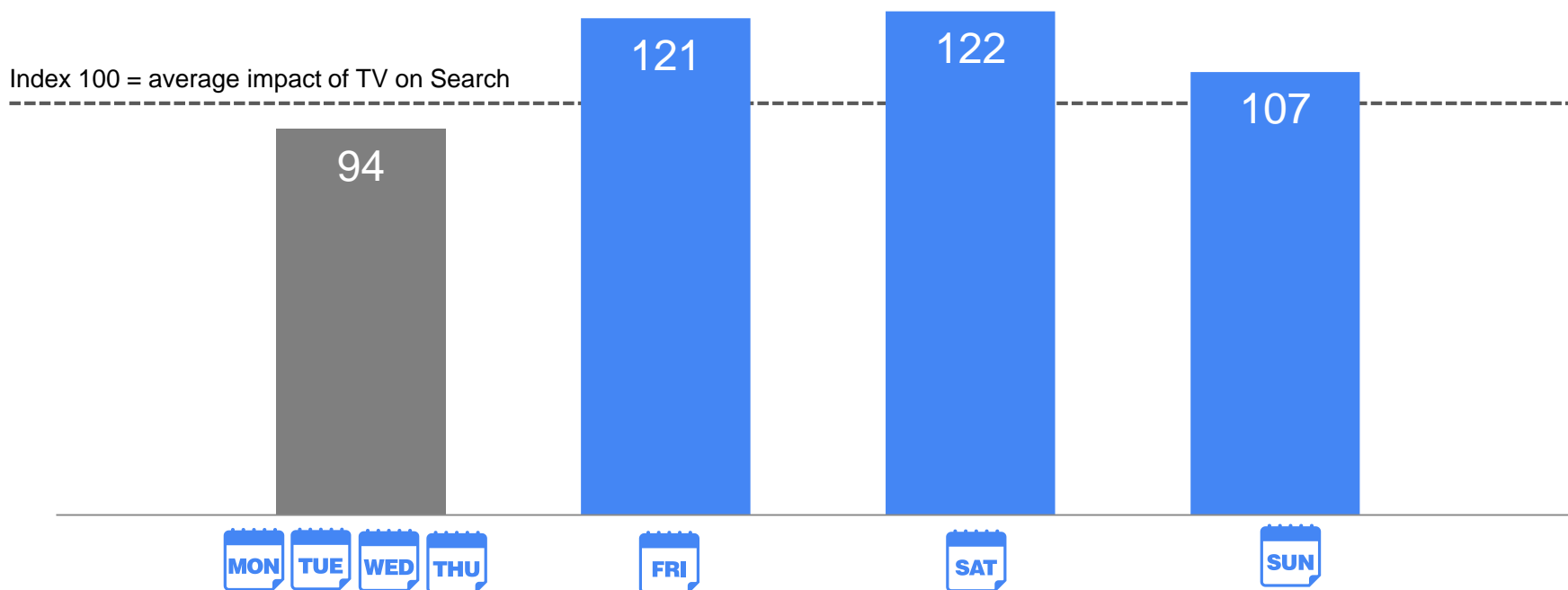
If all other influencing factors are kept stable we see an almost stable effect between 11 am and 11 pm. Time of day (with the exception of morning time) obviously does not show a strong impact on the uplift in search caused by TV.



Search uplift by day of week

(ceteris paribus condition: if all other drivers remained equal)

TV impact on search tends to be stronger on the weekend, particularly on Fridays and Saturdays.



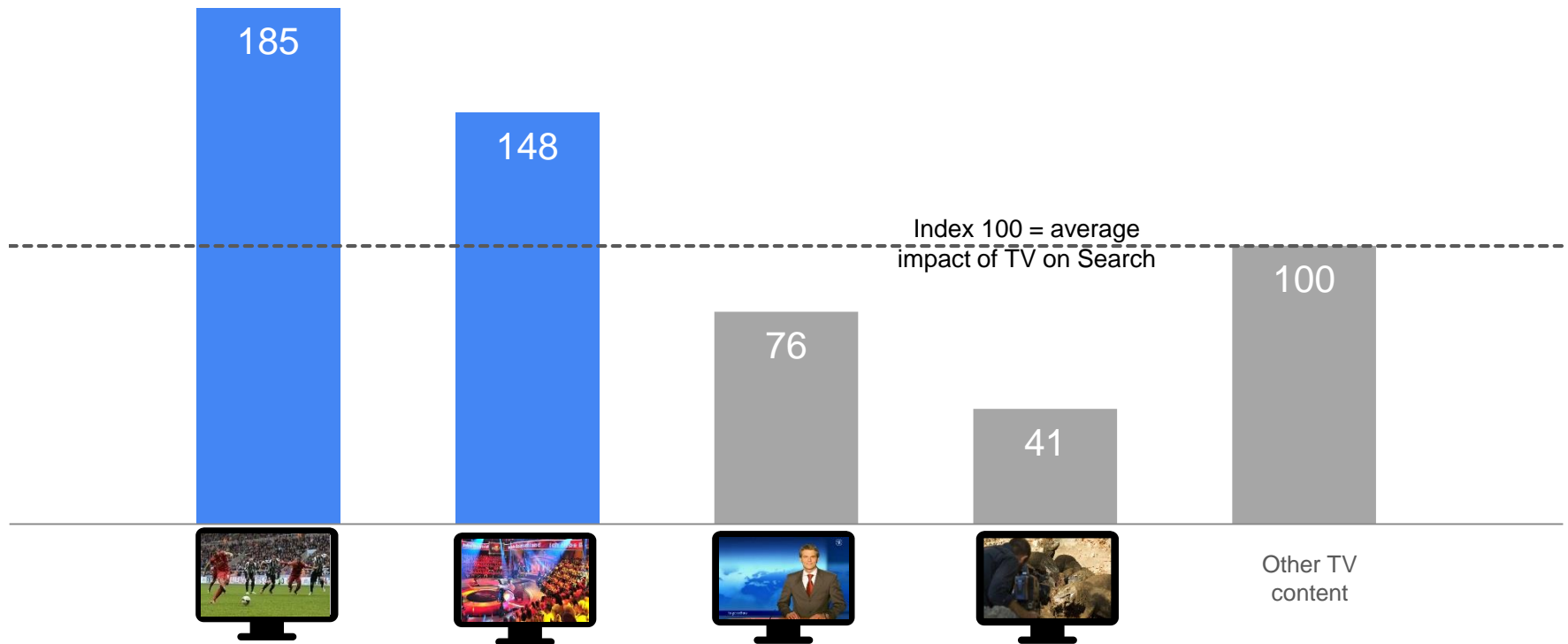
SOURCES:

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- 98 campaigns from 2014 / 2015

Search uplift by TV genre

(ceteris paribus condition: if all other drivers remained equal)

Search uplift is higher during live sports events and TV shows and lower during news and documentaries.



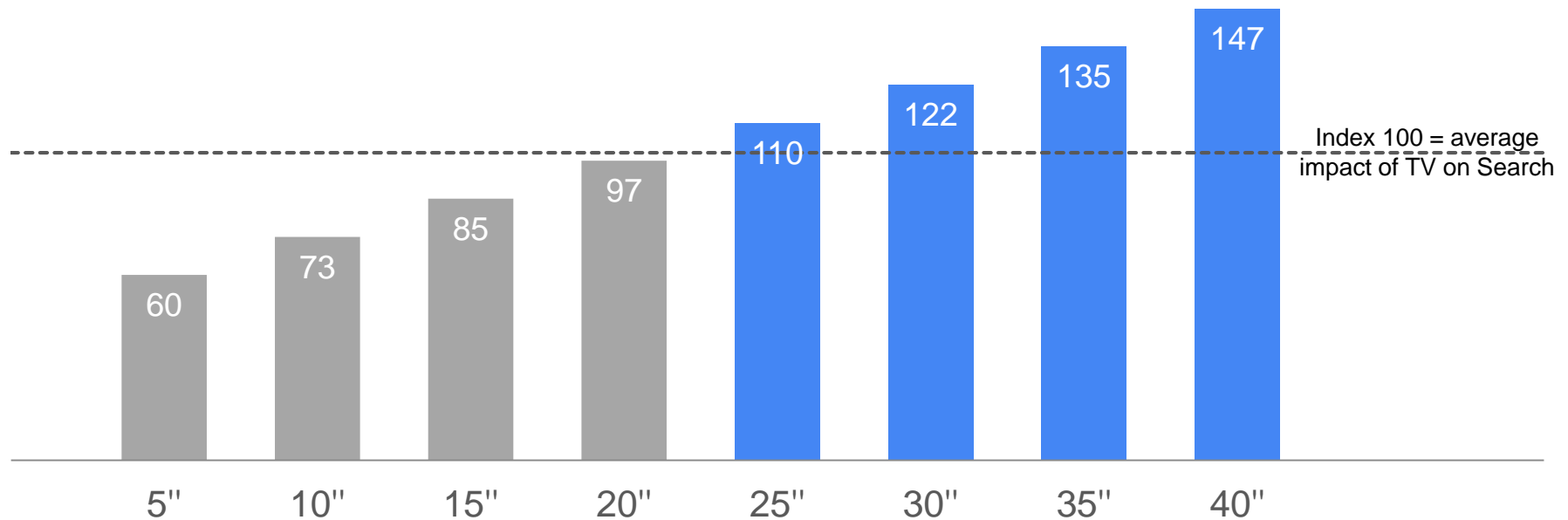
SOURCES:

- DentsuAegis Resolutions (TV campaign data)
- Google (search volume data)
- 98 campaigns from 2014 / 2015

Search uplift by spot length

(ceteris paribus condition: if all other drivers remained equal)

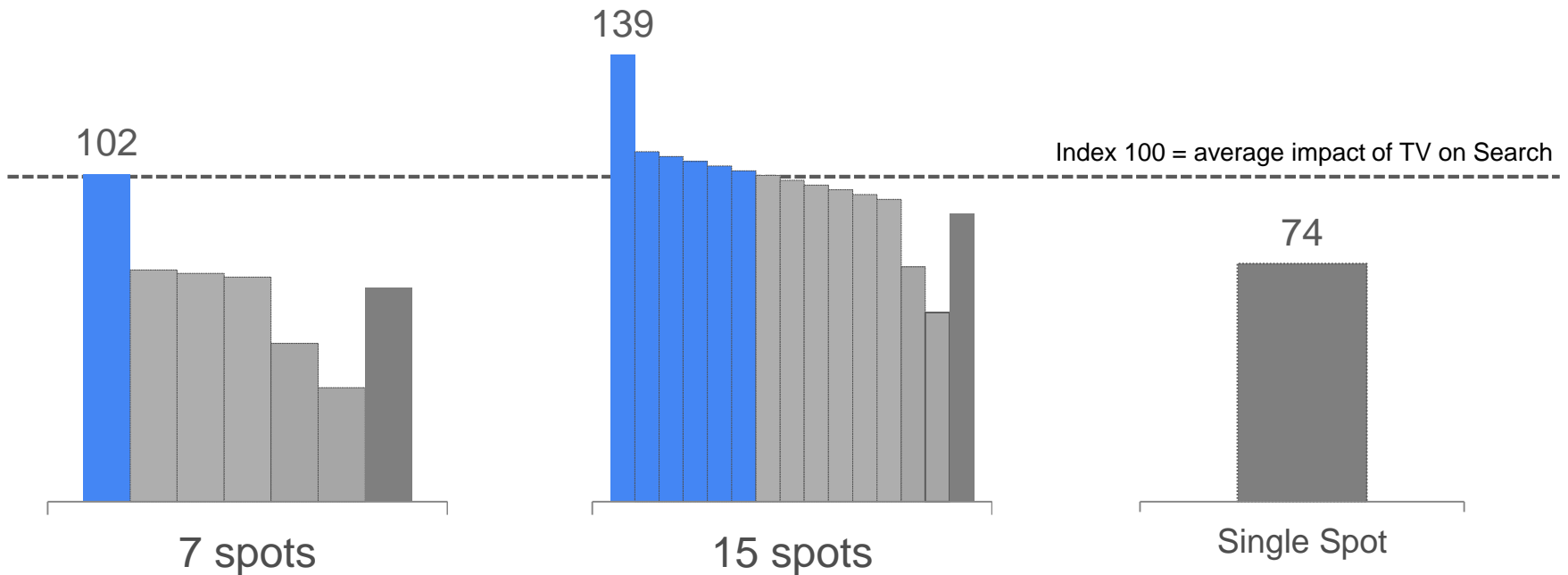
The longer the spot, the higher the impact of TV on search.
Double spot length generates approximately 50% stronger effect.



Search uplift by ad break characteristics

(ceteris paribus condition: if all other drivers remained equal)

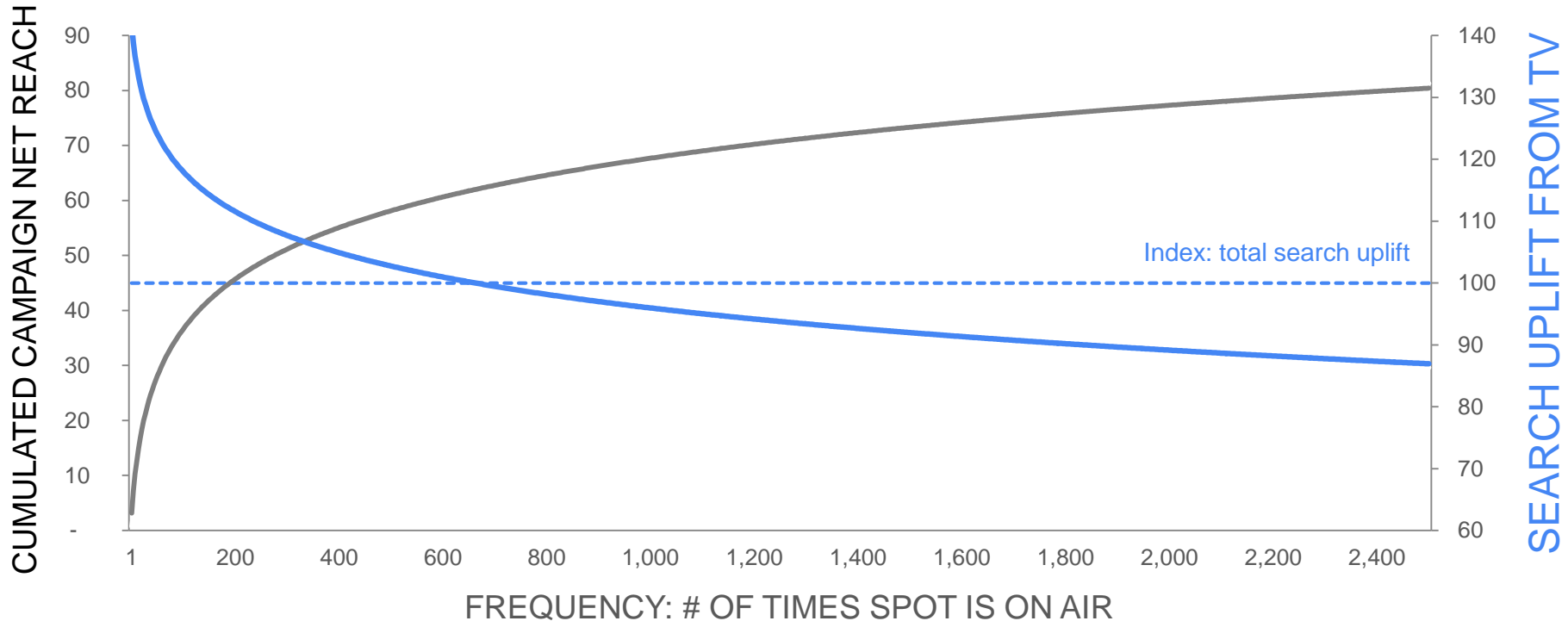
Search impact is higher for spots that run early within a long ad break.
“Special placements” with isolated spots score below average.



Search uplift by frequency on air

(ceteris paribus condition: if all other drivers remained equal)

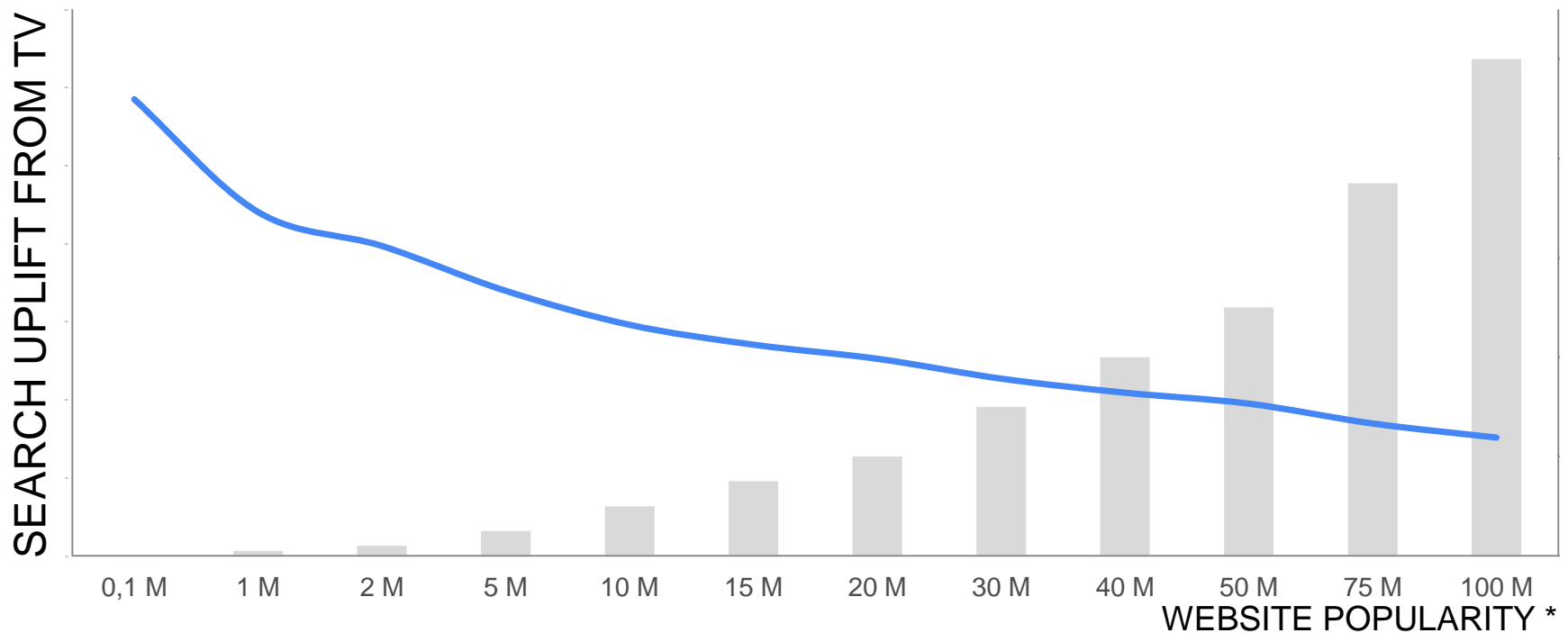
On average, search uplift is highest right after the launch of a campaign and decreases over the course of the campaign.



Search uplift by website popularity

(ceteris paribus condition: if all other drivers remained equal)

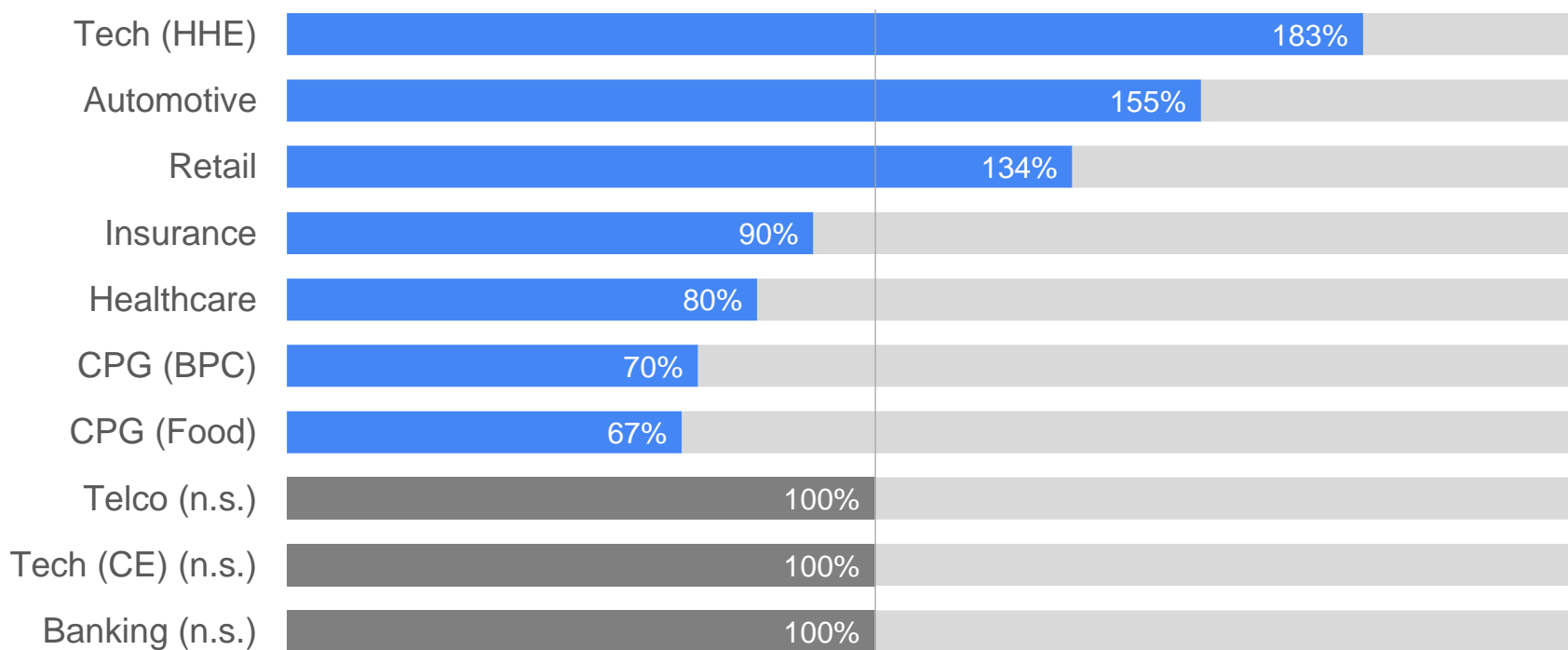
The more popular the website of the advertised brand, the weaker the impact of TV on search.



Search uplift by industry

(ceteris paribus condition: if all other drivers remained equal)

Search uplift is not equally strong for each industry even if all other parameters are kept stable. HH Electronics, Retail and Automotive react strongest.

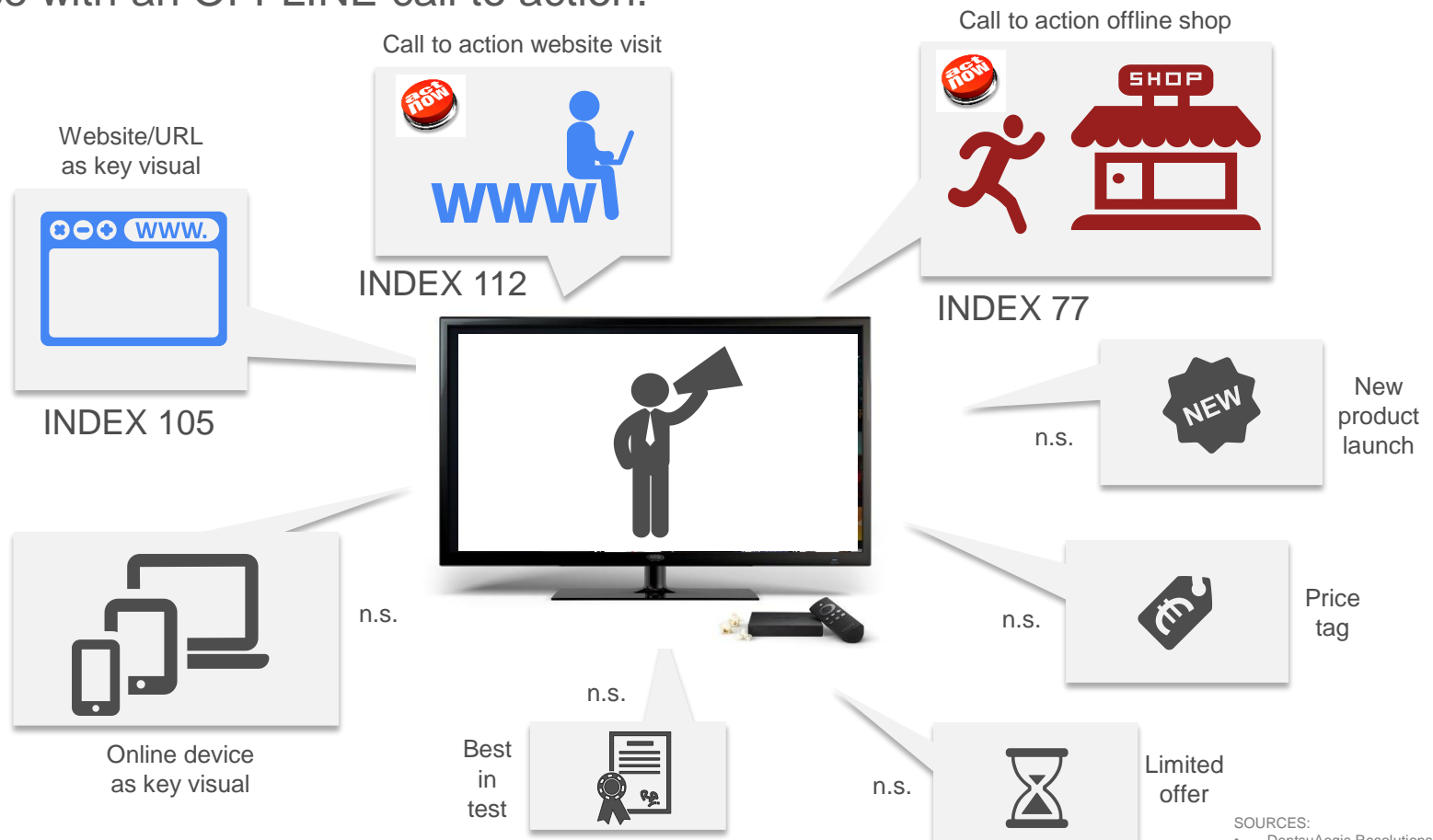


average absolute search uplift
across categories = 100%

Search uplift by creative characteristics

(ceteris paribus condition: if all other drivers remained equal)

Search uplift is higher for ads that feature an ONLINE call to action and lower for those with an OFFLINE call to action.



SOURCES:
• DentsuAegis Resolutions (TV campaign data)
• Google (search volume data)
• 98 campaigns from 2014 / 2015



Wrap up

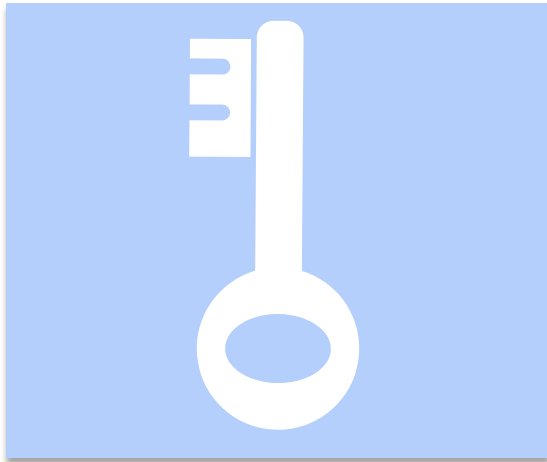
TV impact on search



A new aspect of what we know about search and brands

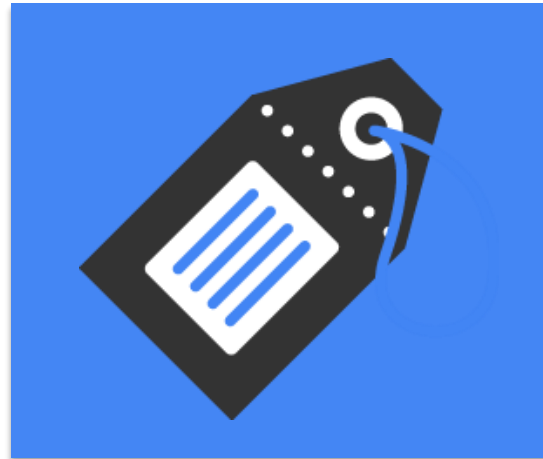
It is **key** to drive traffic

to a brand's website



It is an indicator for an

ad's **activating power**



It can be used

to **build** brands



How, when and where do consumers search in reaction to push advertising?

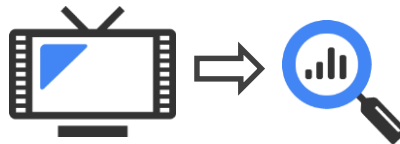
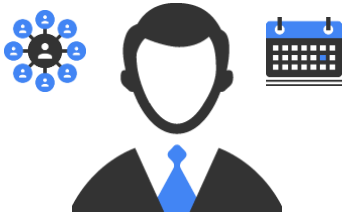
ADVERTISER
plans TV campaign



REACTION
„TV on search“



CONSUMER
exposed to campaign



Adjust planning, e.g.:

- Weekend > Weekdays
- low attention programs



Adjust creatives, e.g.:

- longer spots
- feat. (online) call to action



Regularly switch creatives!



on SMARTPHONES



with BRAND queries



depending on INVOLVEMENT

THANK YOU!

CONTACTS:

Thomas Park

Google Research EMEA

Ying Liu

Quantitative Marketing





Appendix

TV impact on search

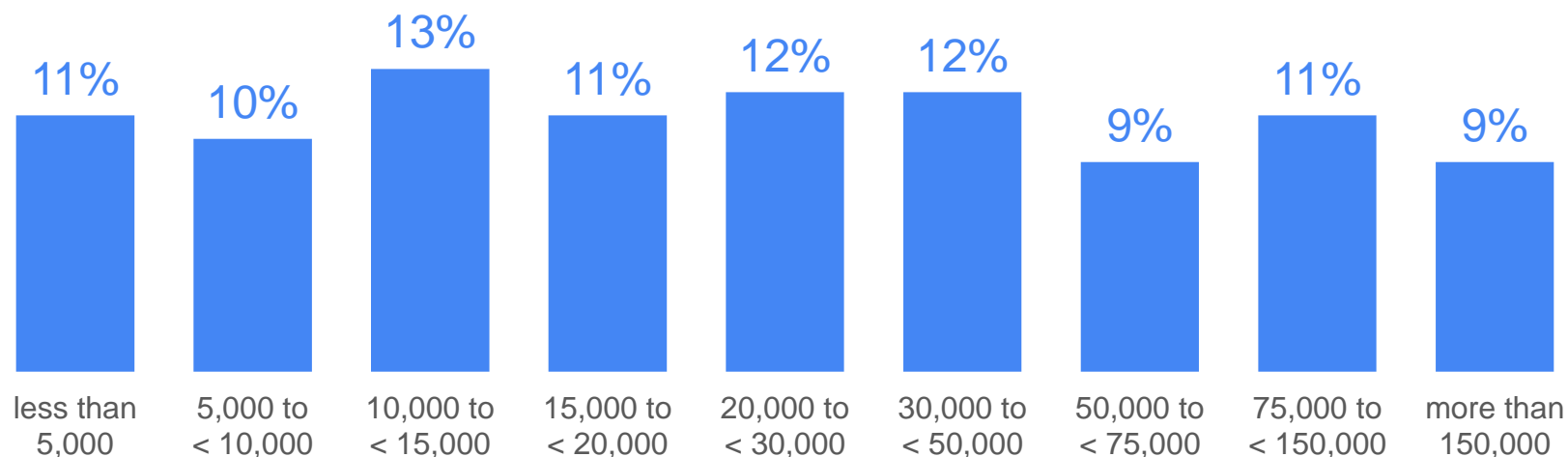


We observe a strong variance in number of incremental queries from TV

In our experience, search *always* reacts to TV:

We observed a positive uplift in queries for every single one of the 98 campaigns, but with huge variance in individual uplift strength, as can be seen below.

SHARE OF CAMPAIGNS WITHIN BENCHMARK STUDY

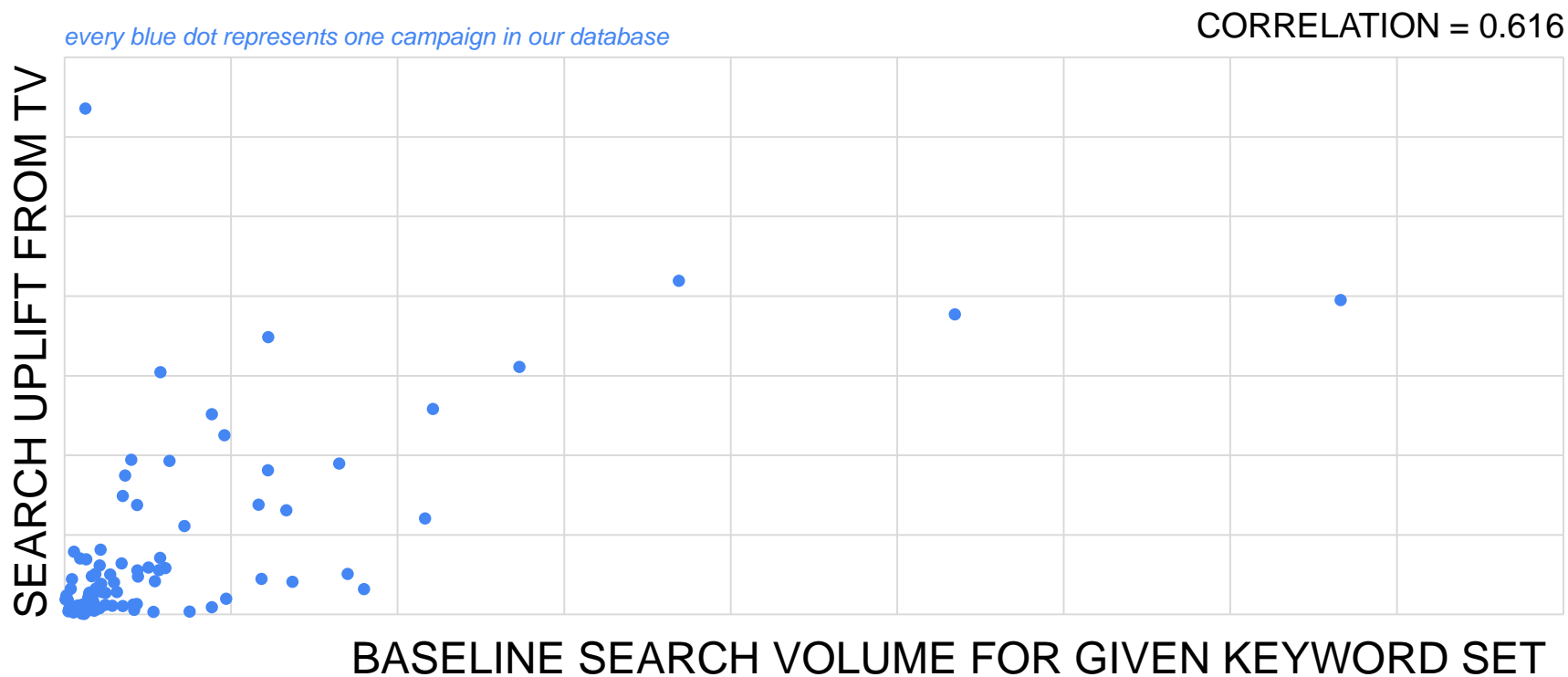


SEARCH UPLIFT FROM TV (# OF INCREMENTAL QUERIES)

General drivers of TV impact on search

→ available “baseline” query volume

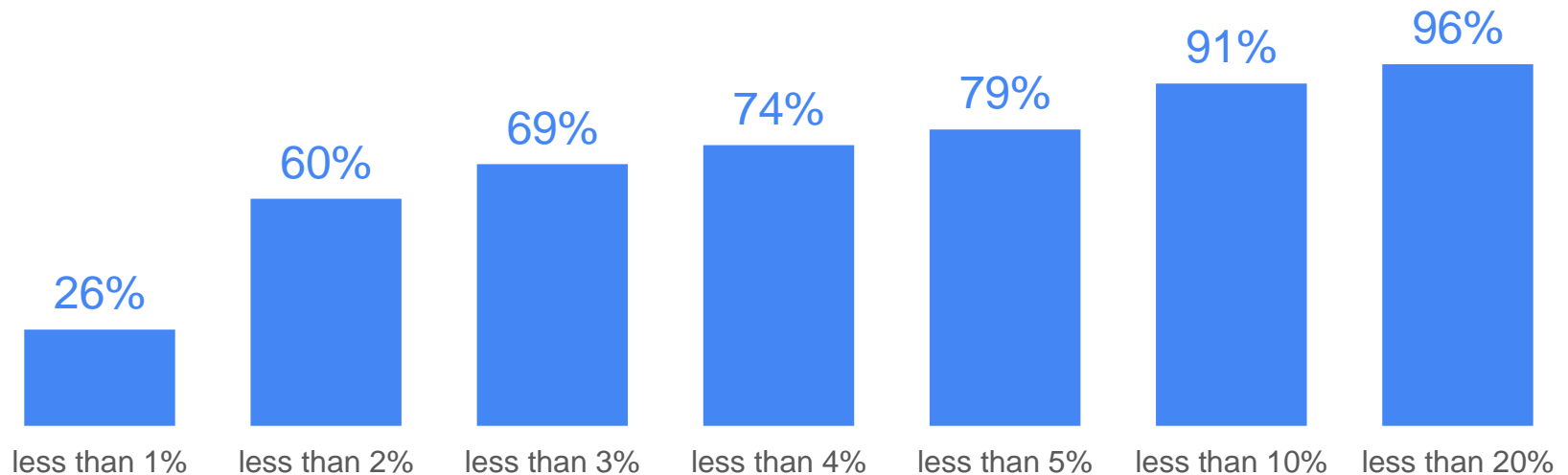
Observation 1: if the baseline query volume for a given campaign is higher, search uplift from TV tends to be higher, too (strong positive correlation).



Search uplift is typically less than 5% of baseline search for \pm 80% of campaigns

The average incremental effect of TV on search is at around 4% of baseline search volume. Some campaigns however perform much better than the rest.*

SHARE OF CAMPAIGNS WITHIN BENCHMARK STUDY

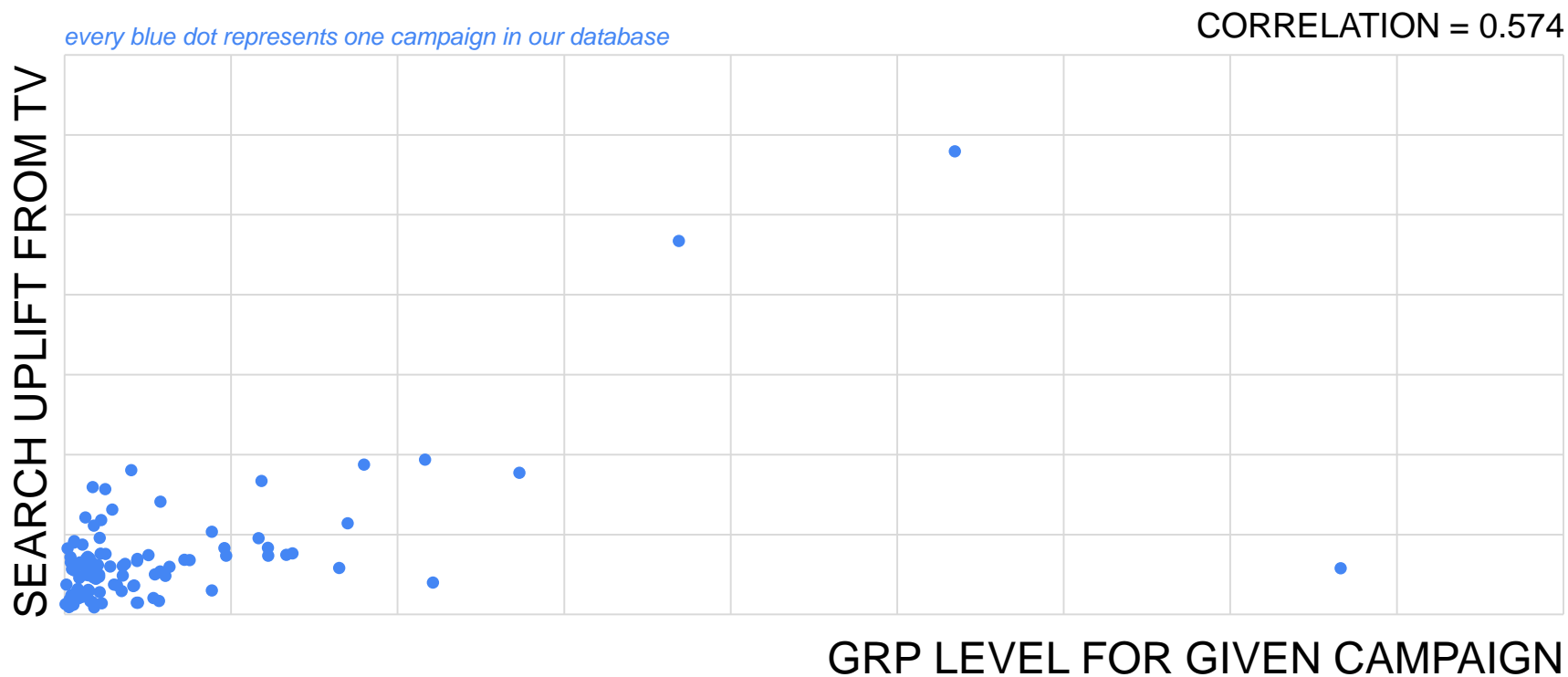


TV IMPACT ON SEARCH IN % OF BASELINE SEARCH VOLUME
(average impact across 98 campaigns = 4.2% uplift to baseline search volume)

General drivers of TV impact on search

→ campaign pressure (GRP online population)

Observation 2: Campaigns with higher GRP levels tend to trigger higher search uplift (strong positive correlation)



In most cases relationship between search uplift and GRP does not surpass 100:1

