



Building marketing craft skills

**Get set for search:
Search Engine Marketing is a rocket**

The Search Academy

The first wave of adoption of search-based marketing to already behind us. SEM has started to be widely used by small and medium sized businesses, many of them startups and has become a fundamental part of their business. In this lesson we're going to have a closer look at the SEM revenues, market size and its future growth.



**DIGITAL
TRAINING
ACADEMY**

The knowledge transfer business

Getting set for search...

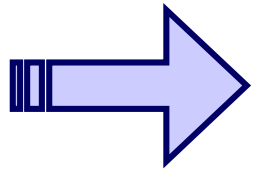
SEM is a rocket

...market figures that draw the picture

A training and development workshop
for online marketers

This academy covers

- **SEM spend in the US**
- **SEM market size growth**
- **Latest trends**
- **SEM market in Poland**



Magic numbers

How much is spent on SEM?

Magic numbers

Search engine marketing spend

- **\$9.4 billion spent on search engine marketing in 2006 in North America**
- **It includes: paid placement, paid inclusion, organic search engine optimization and SEM technology platforms**

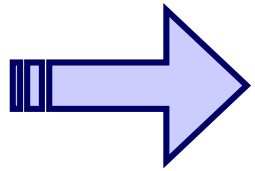
Source: SEMPO Survey 2007

Magic numbers

Search engine marketing spend

- **62% increase over 2005 spending**
- **estimated \$18.6 billion by 2011**

Source: SEMPO Survey 2007



Latest trends

How is SEM changing?

Latest trends

Changes in SEM

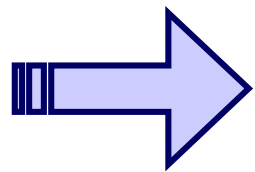
- **Small and medium sized businesses, many of them startups, use SEM as a fundamental part of their business**
- **Organic SEO is still the most popular form of SEM (almost 75% advertisers use this method)**
- **Paid placement is used by 71% of advertisers**

Source: SEMPO Survey 2007

Latest trends

Changes in SEM

- **direct sales is becoming a primary reason for SEM spending**
- **Google AdWords still most popular search advertising program (used by 96% of respondents)**
- **SEM continues to poach budget from other marketing channels, especially offline marketing programs**
- **in-house marketing programs continue to grow, portending further consolidation on the agency side of the business**



SEM in Poland

Who's leading the way?

Value of SEM in Poland

- **Still...**

?

... unknown

SEM in Poland

Weekly rankings (search engine domains)

Search engines (domaines)			
Search engines	22.V.2007 - 28.V.2007	29.V.2007 - 4.VI.2007	5.VI.2007 - 11.VI.2007
google.com	85.6%	84.9%	85.8%
onet.pl	6.4%	6.7%	6.4%
wp.pl	4.7%	4.6%	4.6%
interia.pl	1.1%	1.1%	1.0%
msn.com	0.8%	1.0%	1.0%
szukacz.pl	0.5%	0.6%	0.5%
yahoo.com	0.4%	0.5%	0.2%
netsprint.pl	0.1%	0.2%	0.2%
o2.pl	0.1%	0.2%	0.1%

SEM in Poland

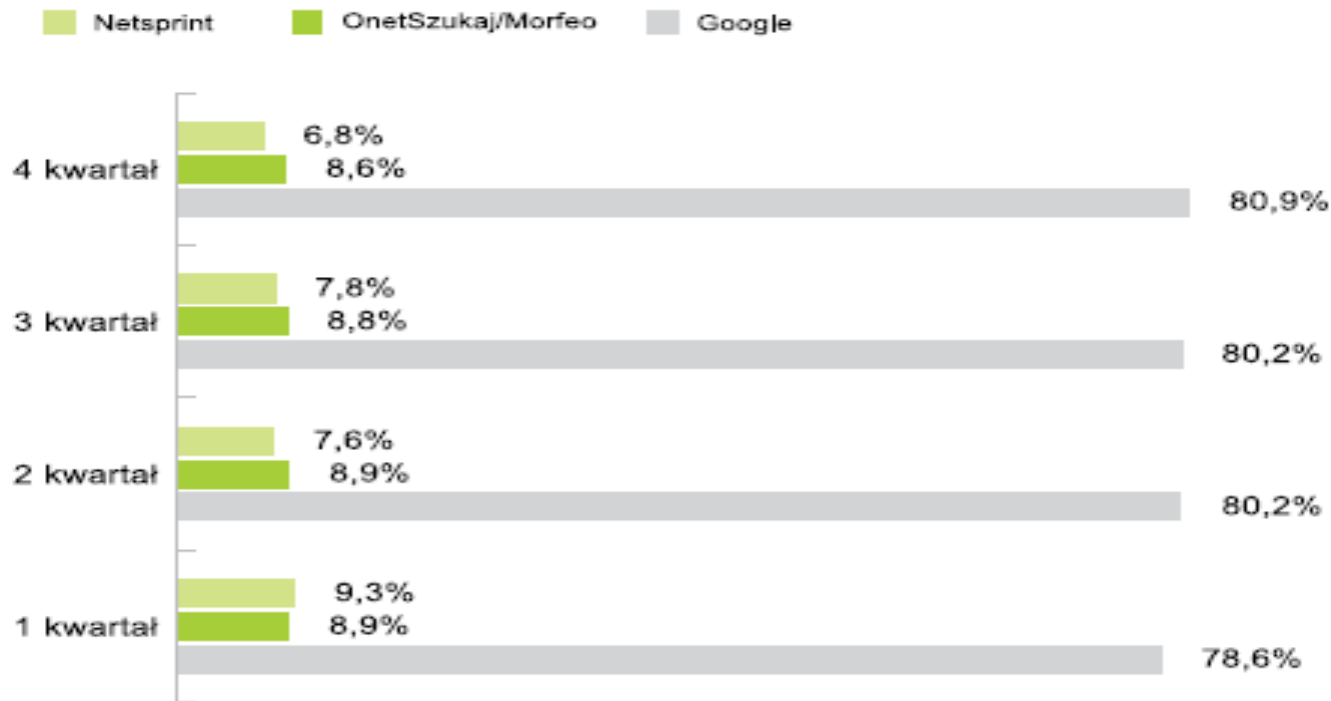
Weekly rankings (search engines)

Search engines			
Search engines	22.V.2007 - 28.V.2007	29.V.2007 - 4.VI.2007	5.VI.2007 - 11.VI.2007
Google	86.7%	86.1%	86.9%
Morfeo	6.4%	6.7%	6.4%
NetSprint	5.0%	5.0%	5.0%
MSN	0.8%	1.0%	1.0%
Szukacz	0.5%	0.6%	0.5%
Yahoo	0.4%	0.5%	0.3%

SEM in Poland

Search engines in 2006

silniki wyszukiwarek w 2006 roku

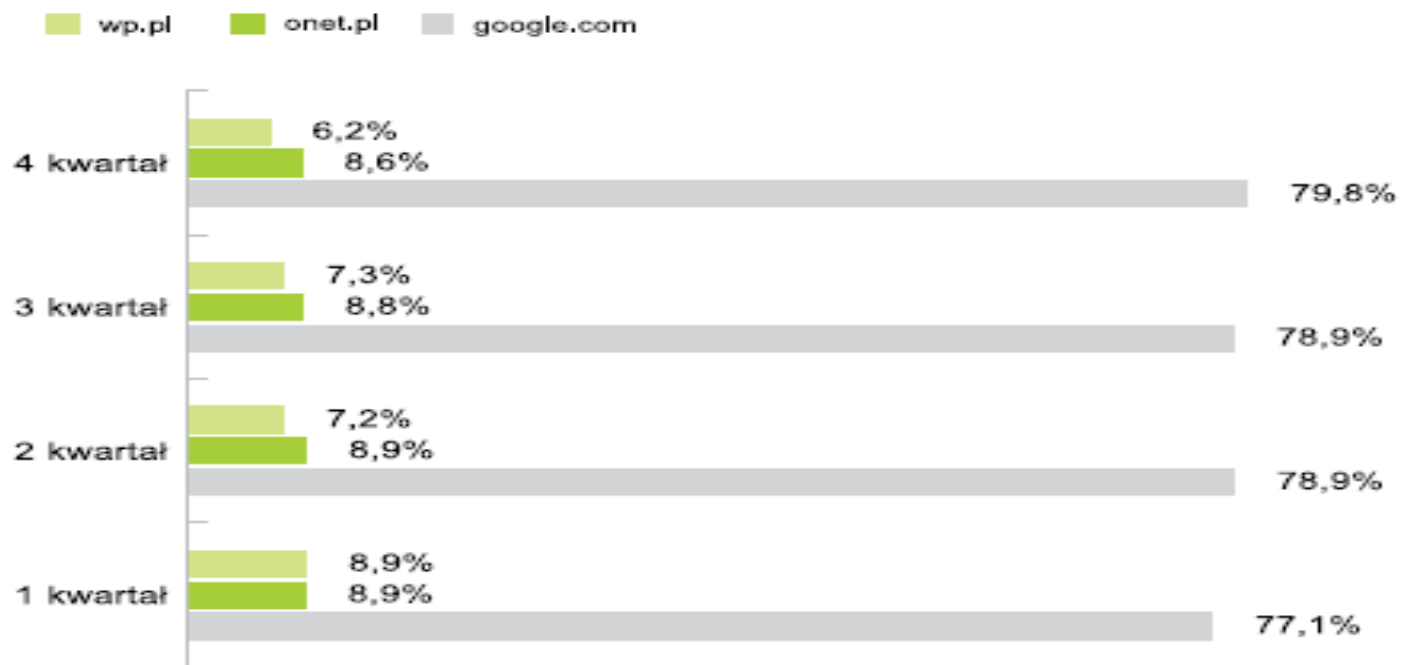


Źródło: gemiusTraffic

SEM in Poland

Search engine domains in 2006

wyszukiwarki - domeny w 2006 roku



Źródło: gemiusTraffic

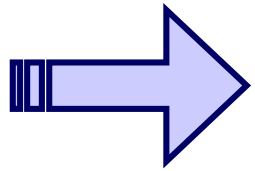
SEM in Poland

Search engine domains in 2006

ranking witryn wyszukiwarek

lp.	nazwa	zasięg	użytkownicy
1.	google.com	83,38%	10 981 759
2.	szukacz.pl	9,50%	1 251 335
3.	information.com	8,65%	1 138 970
4.	netsprint.pl	5,40%	711 232
5.	gogle.pl	4,91%	646 814
6.	mywebsearch.com	4,18%	550 911
7.	upspiral.com	2,72%	358 255
8.	myglobalsearch.com	2,70%	355 348
9.	looksearch.com	2,33%	306 450
10.	emulti.pl	1,39%	183 133

Źródło: Megapanel PBI/Gemius, grudzień 2006



Latest trends

How is SEM changing?

Latest trends

Changes in SEM

“2006 was a watershed year for the SEM industry”

**Kevin Lee, member of the Board of Directors of SEMPO
and chair of its Research Committee**

Source: SEMPO Survey 2007



Key takeaways?

This academy covered

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Making sense of a digital world

The Digital Training Academy



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