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# Word of Mouth and the Internet

Google/Keller Fay Group, U.S.

June 2011

There are  
**2.4 billion** conversations that involve a brand per day.

There are  
**3.3 billion** mentions of brands in a day.

That comes out to about  
**1.4 impressions per conversation.**

We wondered, what effect do the Internet and Internet enabled devices have on these conversations?

What is the effect on Word of Mouth?

# A Media Model for Consumer Conversations

Consumer conversations have **three opportunities to leverage media content**



## Before Conversation

The “trigger” or spark  
Source of prior knowledge



## During Conversation

Reference resource  
Fact checking  
Content to share



## After Conversation

Learn more  
Verify  
Take action  
Share more widely

### Our Methodology:

- The study measured the degree to which media & marketing channels provide content to consumer conversations about brands across 12 categories
- 3,000 adult respondents:
  - Whether anybody in their recent conversation relied on media or marketing sources of content before or during the conversation
  - We also asked whether respondents sought out more information from any source after the brand conversation
- Fielded in the U.S. in December 2010

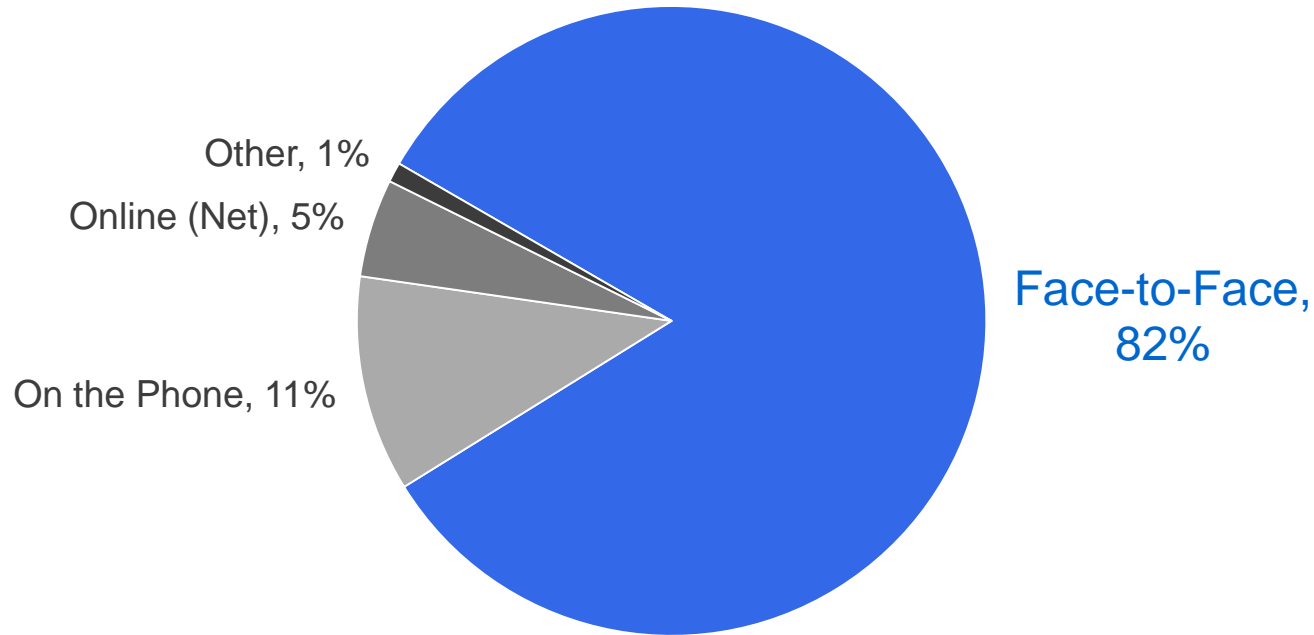
We'll refer to a conversation that involves a mention of a brand as a . . .

**Word of Mouth (WOM) Conversation**

# Key Findings

- 1** Word of Mouth conversations still predominantly take place face to face. 94% of WOM brand impressions occur offline.
- 2** The Internet is both the leading spark of WOM conversations and the #1 resource utilized to take action after conversation. Search impacts more than 15% of all Word of Mouth conversations.
- 3** Google is the #1 spark of Word of Mouth conversations and the #1 place people turn to after conversations for more information.
- 4** Google directly informs 146 million brand conversations a day.
- 5** Word of Mouth impressions generated by search are 25% more credible and 17% more likely to lead to purchase than those generated by online social media sites.

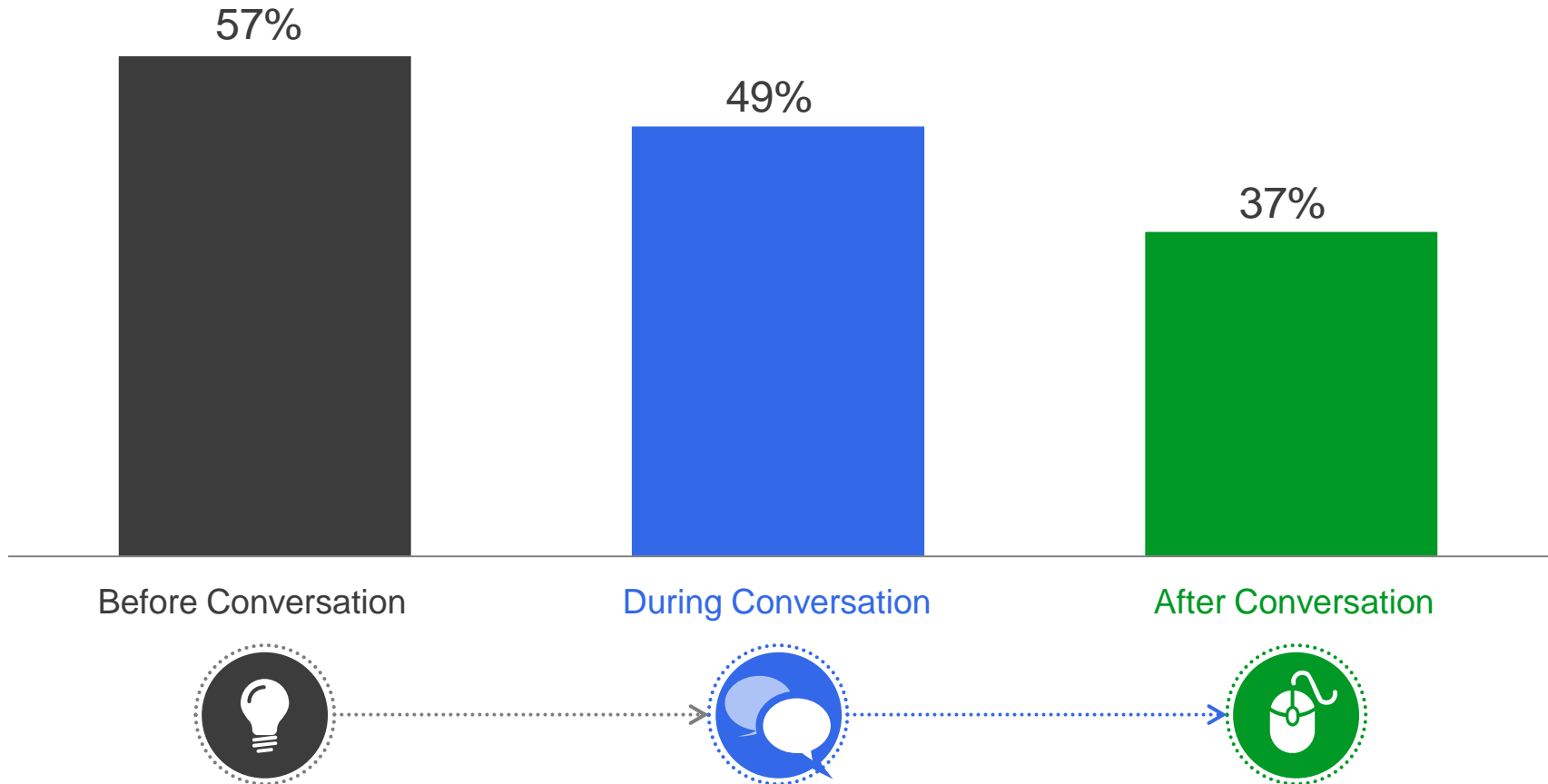
# Word of Mouth Conversations Mostly Offline



People still talk about brands mostly face to face.

# Media & Marketing Influence Conversations about Brands

**% of Brand Conversations Involving ANY Media/Marketing References**



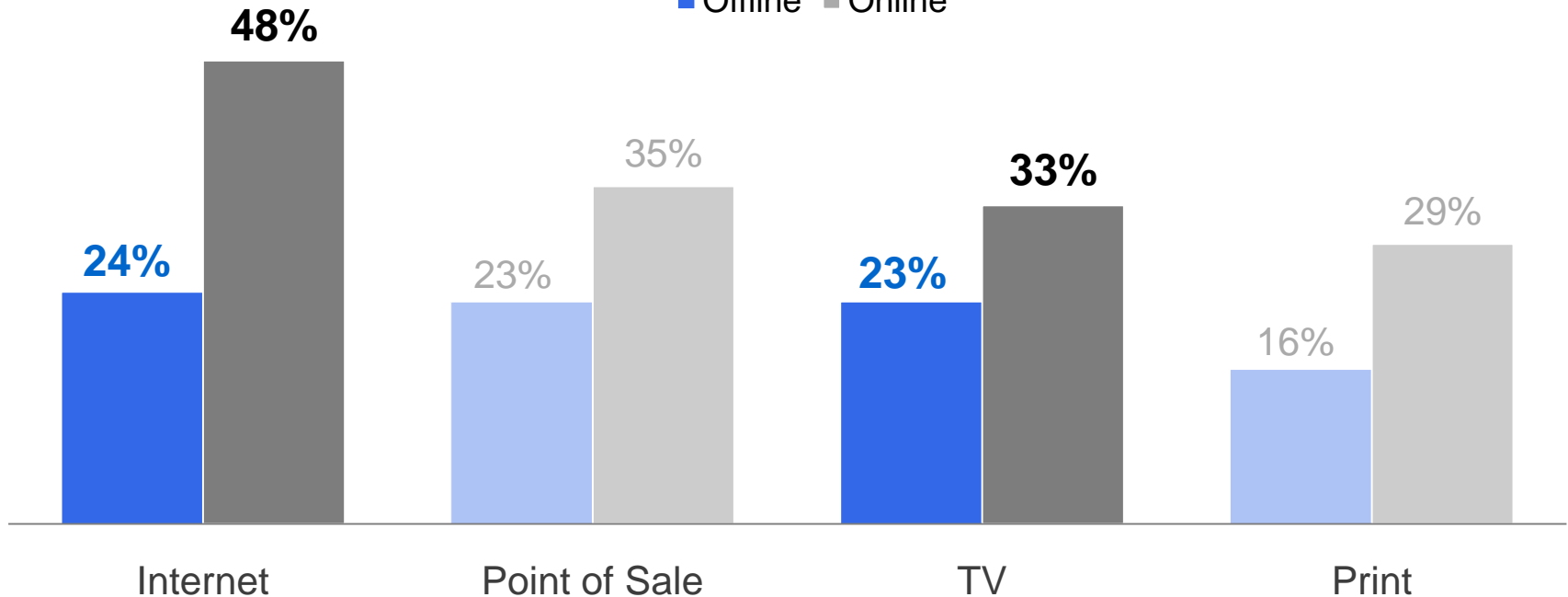
Base: Brand Conversations (All Categories, n=6,747) Q5a. Did anyone in the conversation (including yourself) refer to something they saw or heard prior to the conversation about (Brand) from any of these sources? Which? Please select all that apply. Q5b. Did anyone in the conversation (including yourself) refer to something they saw or heard during the conversation about (Brand) from any of these sources? Which? Please select all that apply. Q5c. And did you seek out information after the conversation about (Brand) using any of the following sources as a result of the conversation? Which? Please select all that apply. \*Respondents are able to select up to two media/marketing sources, so percentages do not add to the top summary row. Source: Google/KellerFay, Word of Mouth and the Internet Study, June 2011



# Online Talk About Brands More Likely to Reference Marketing

% of Brand Conversations Involving Media/Marketing Reference Before or During the Conversation

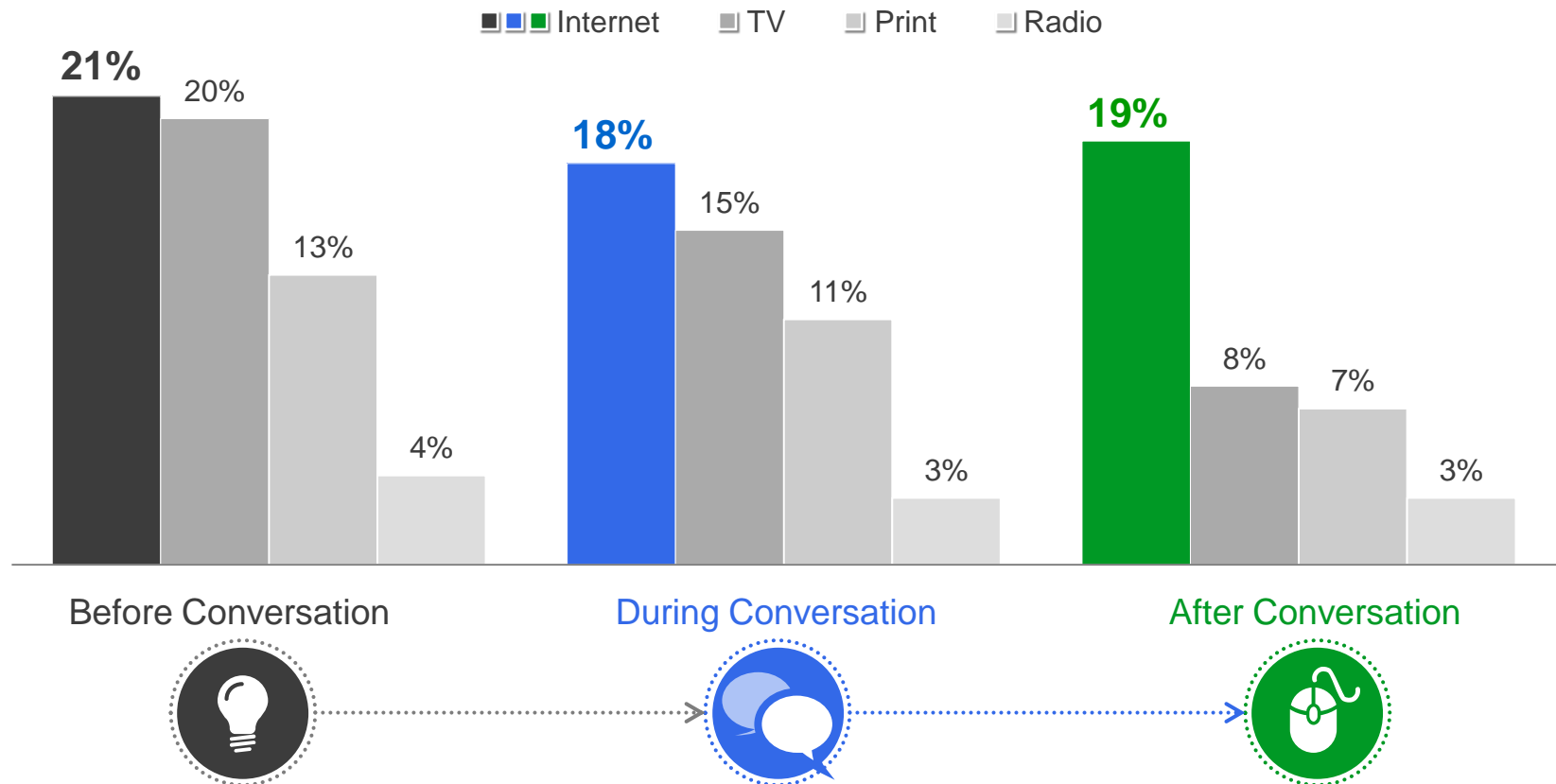
■ Offline ■ Online



Online conversations generally include more media references than offline. The Internet is the most often cited source of content for conversations – even more so online.

# Internet is Most Important Source of Content at All Phases

% of Brand Conversations Involving Media/Marketing Reference Before or During the Conversation, or Info-Seeking Using Source After Conversation

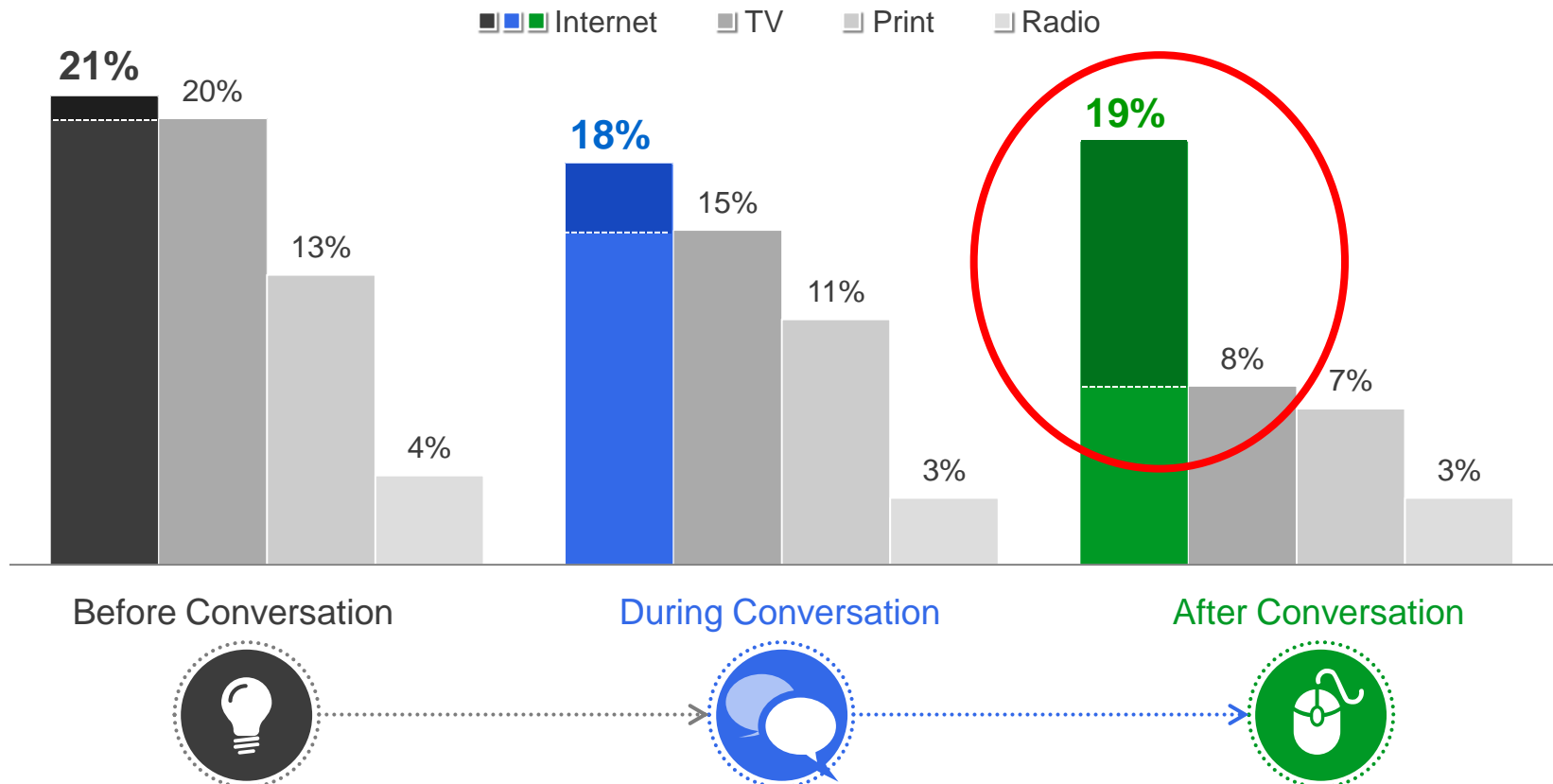


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# Especially to Follow Up After a Conversation

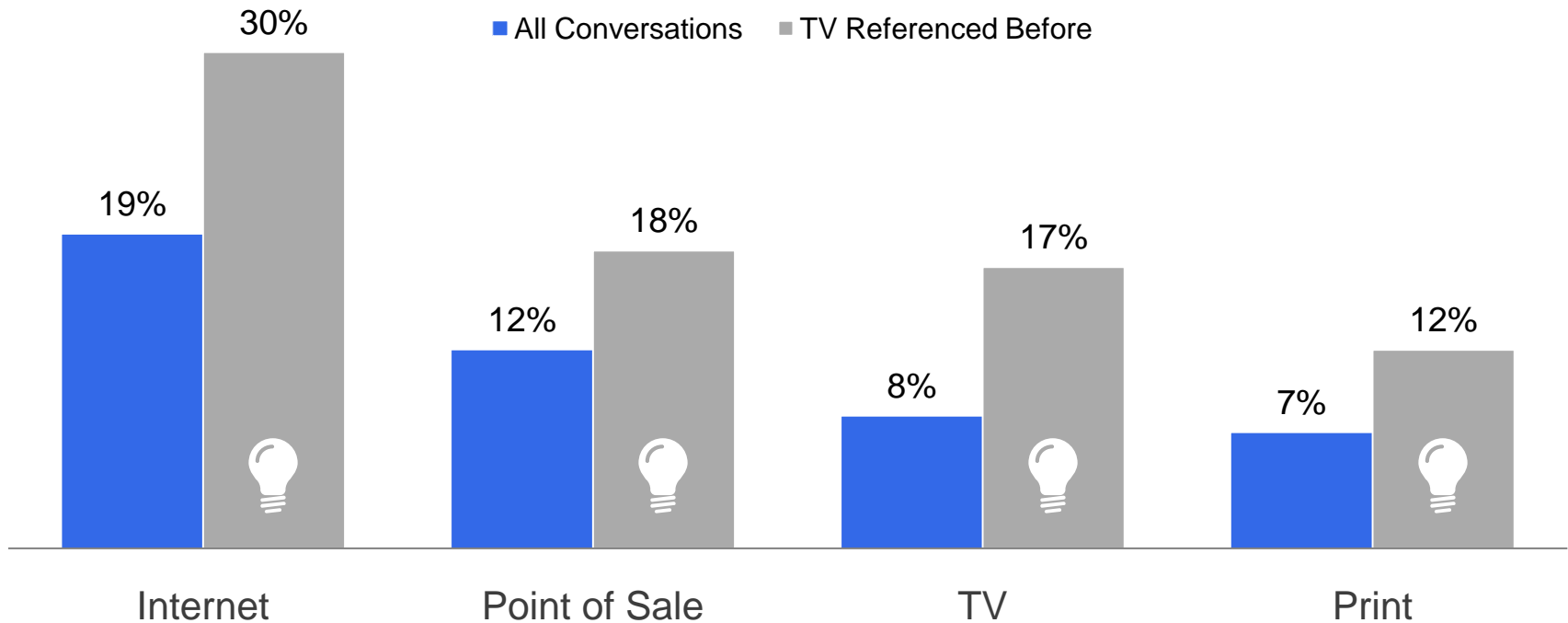
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# Especially Conversations Sparked by TV

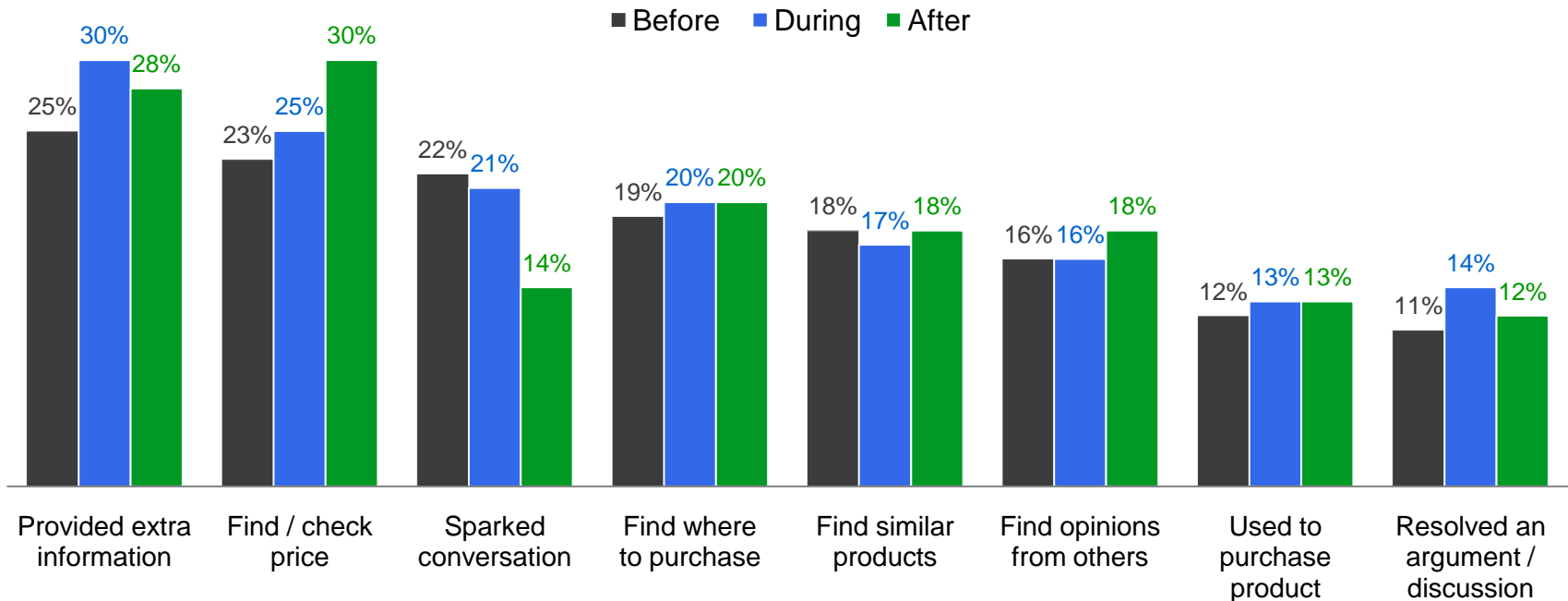
## Marketing/Media Referenced AFTER the Conversation: All Categories



After 30% of conversations that reference prior TV content, consumers turn to the Internet

# Internet Used for Variety of Purposes

## Role Internet Plays: All Categories



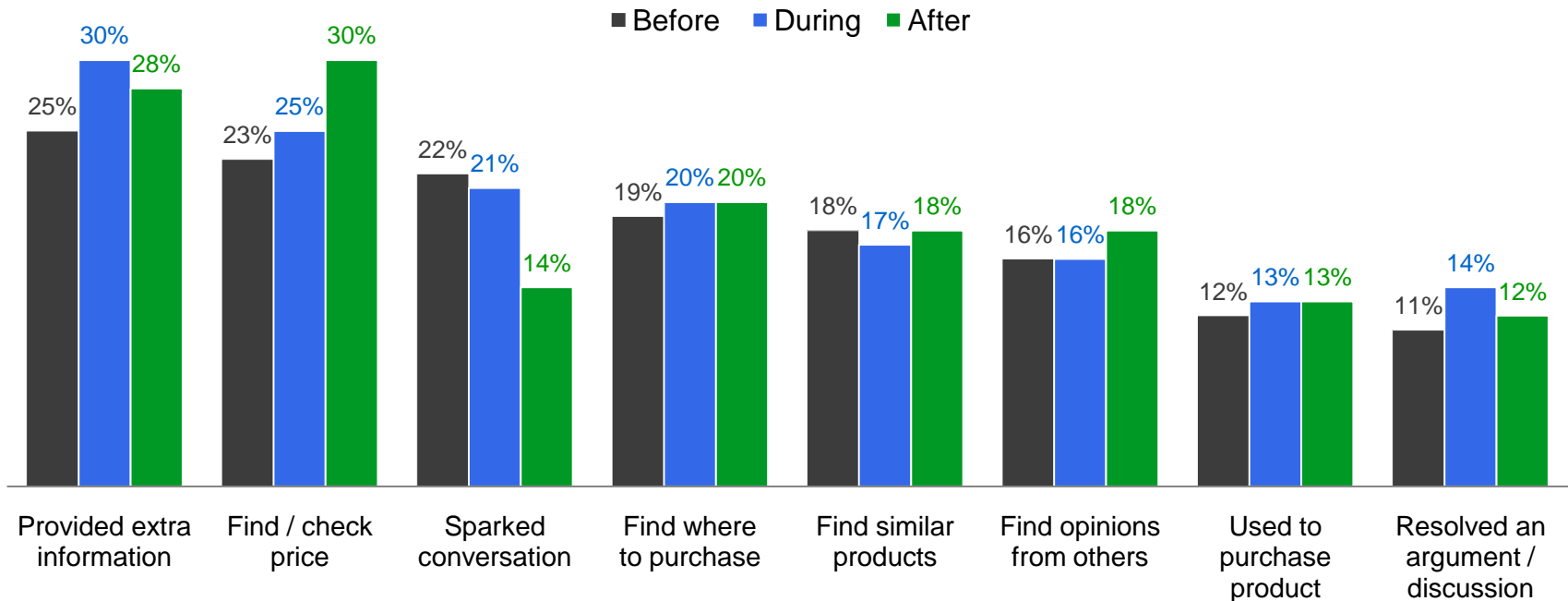
**BEFORE and  
DURING** conversations

the internet is most used  
to provide additional information



# Internet Actions are More Specific After a Conversation

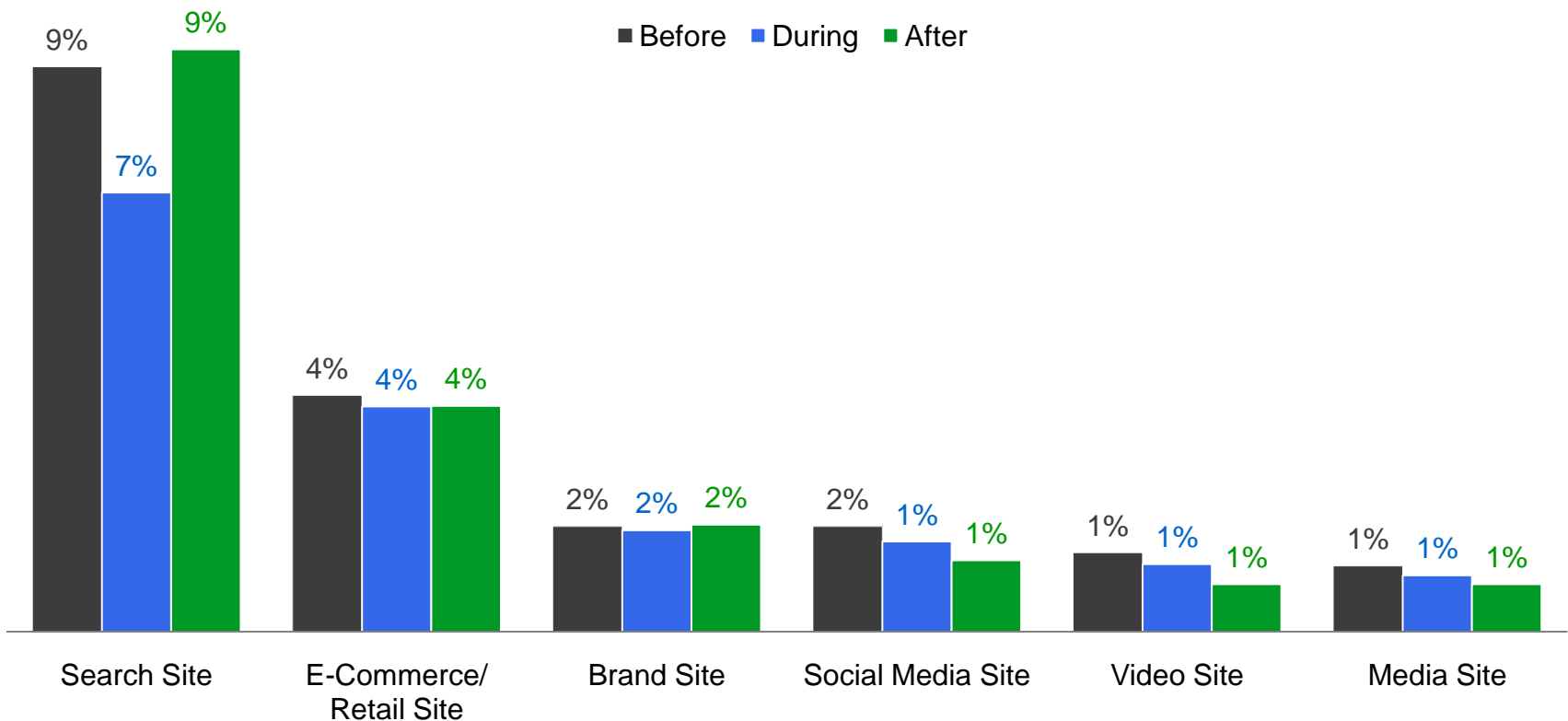
## Role Internet Plays: All Categories



**AFTER** word of mouth conversations, Internet use is focused on checking prices, extra information and finding where to buy products

# Search is the #1 Site Type Visited at All Stages

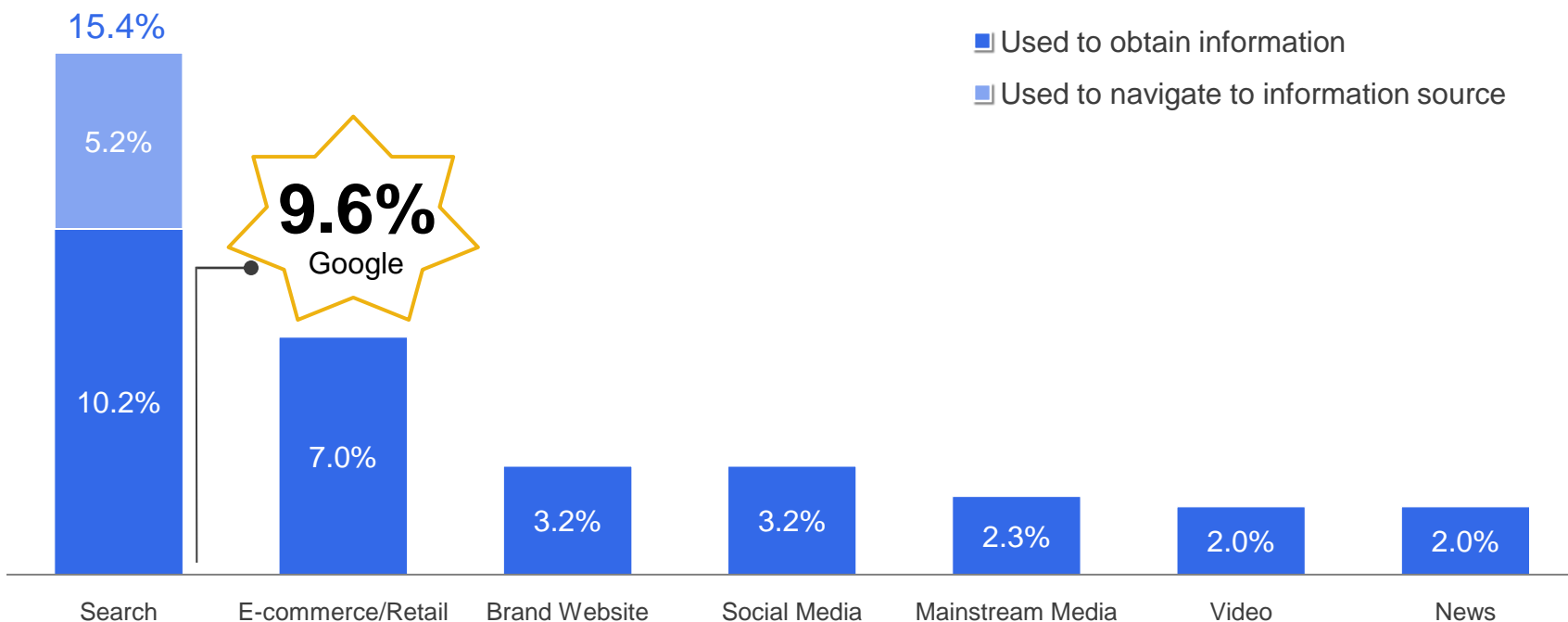
% of Conversations in Which Information From Specific Type of Website was Obtained BEFORE, DURING, or AFTER the Conversation



Base: Brand Conversations (All Categories, n=6,747) Q6ai-iii. What specific website provided information related to (Brand) (prior to the conversation/during the conversation/after the conversation)? If more than one website was involved, please select the one that was most prominently discussed. Q6di-iii. Which search engine was used (prior to the conversation/during the conversation/after the conversation)? Source: Google/KellerFay, Word of Mouth and the Internet Study, June 2011

# Search is the Most Used Type of Site

## Websites Referenced or Used Before, During or After a Conversation



Search websites are used to find information in more than **15%** of all conversations. Google contributes to **almost 10%** of all brand conversations.

Base: Brand Conversations (All Categories, n=6,747)

Q6ai-iii. What specific website provided information related to (Brand) (prior to the conversation/during the conversation/after the conversation)? If more than one website was involved, please select the one that was most prominently discussed.

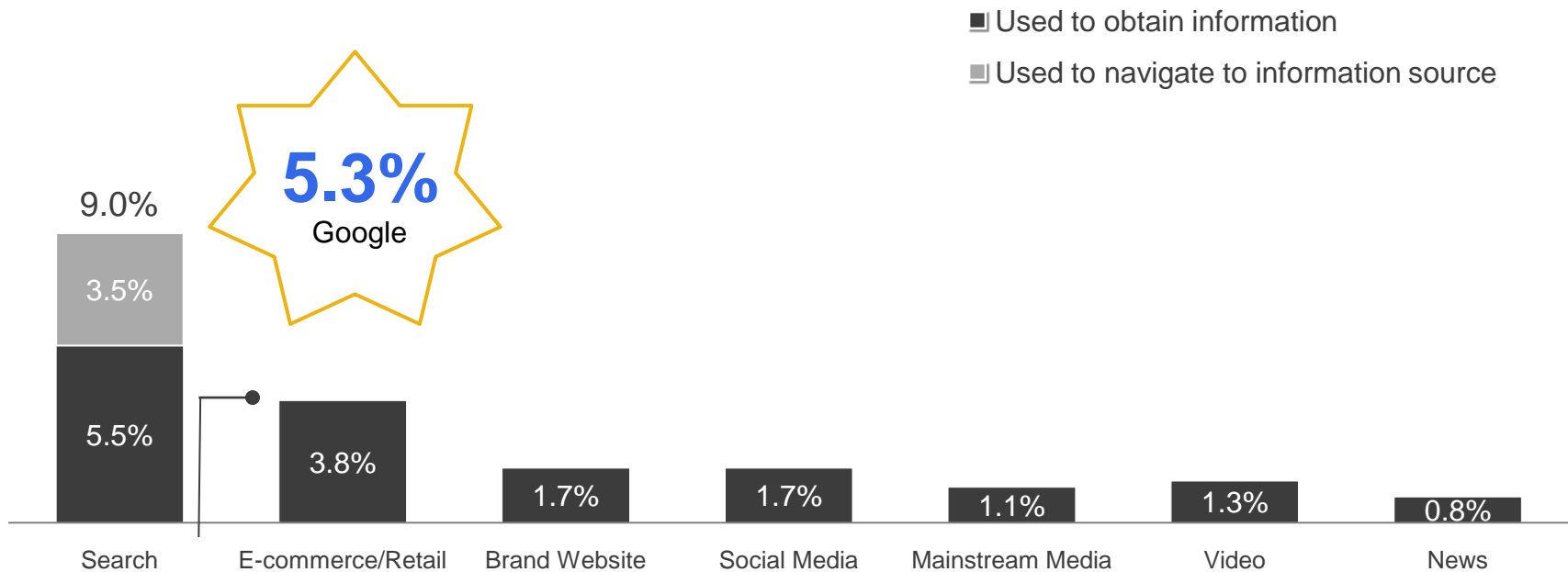
Q6di-iii. Which search engine was used (prior to the conversation/during the conversation/after the conversation)?

Source: Google/KellerFay, Word of Mouth and the Internet Study, June 2011



# Search Impacts Conversation More than any Online Source

Websites Referenced or Used Before Conversation



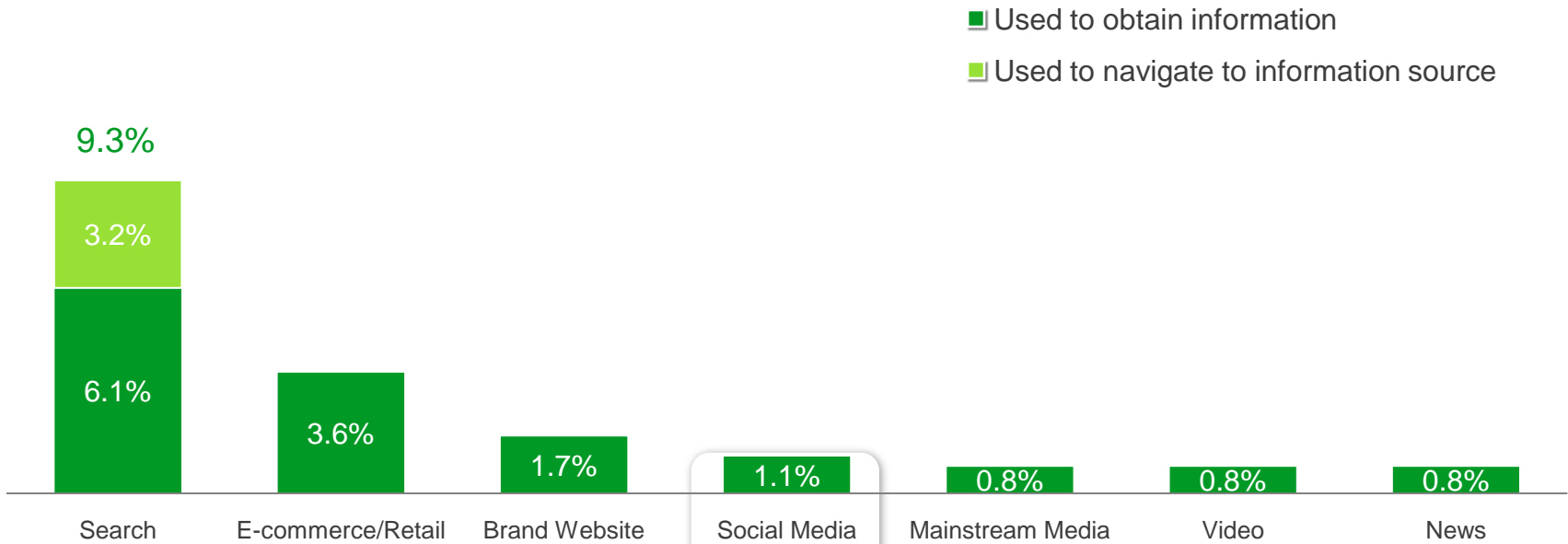
Google is the leading search site for informing WOM conversations.

Base: Brand Conversations (All Categories, n=6,747) Q6ai-iii. What specific website provided information related to (Brand) (prior to the conversation)? If more than one website was involved, please select the one that was most prominently discussed. Q6di-iii. Which search engine was used (prior to the conversation)?

Source: Google/KellerFay, Word of Mouth and the Internet Study, June 2011

# Search is the #1 Online Follow Up

## Websites Referenced or Used After the Conversation



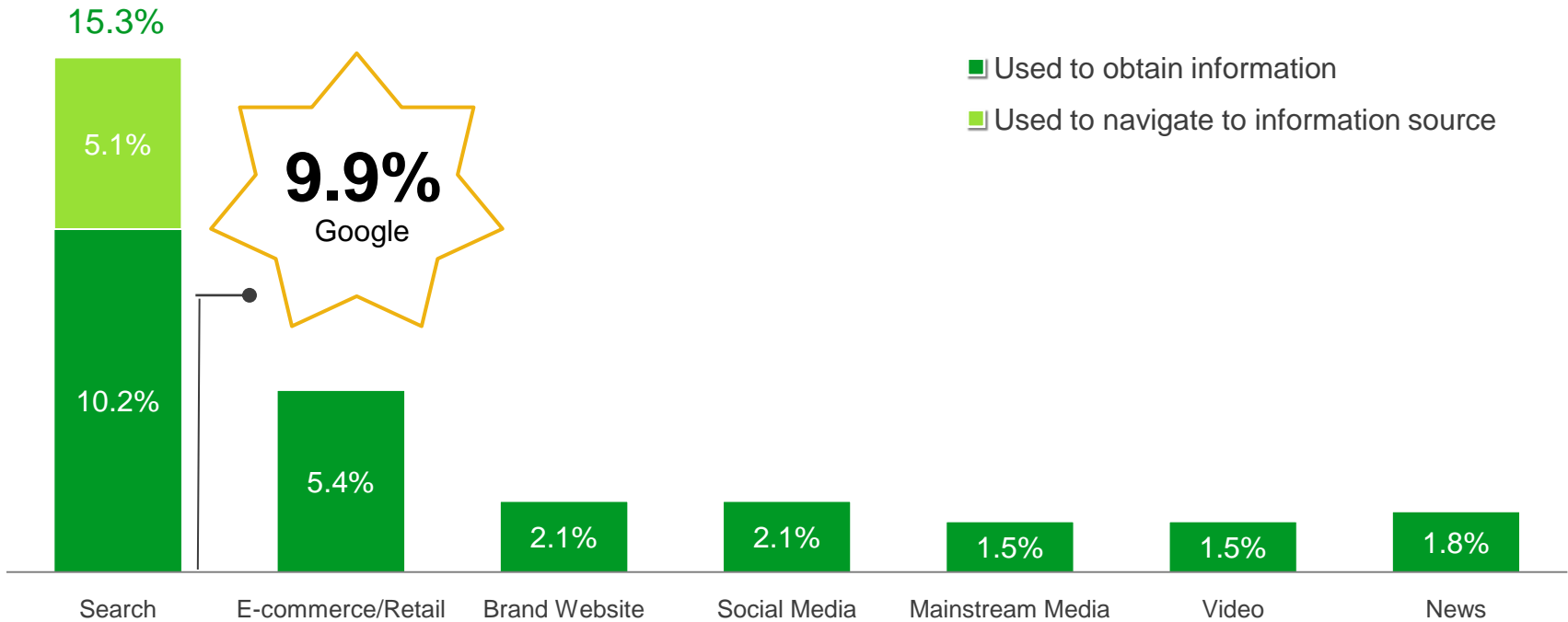
After talking about a brand, users are more likely to search online than visit social media sites.

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Source: Google/KellerFay, Word of Mouth and the Internet Study, June 2011

# Search's Role More Pronounced when WOM Follows TV

Websites Referenced or Used When After TV Generated Conversation



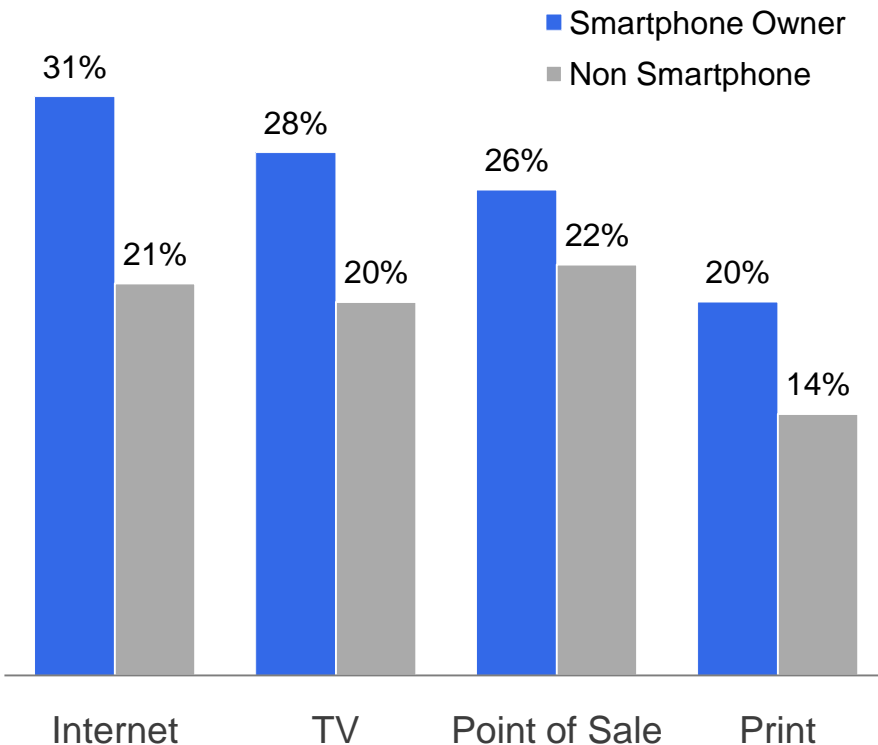
Conversations inspired by TV are even more likely to lead to follow up searching.

Base: Brand Conversations (All Categories, n=3,077) Q6ai-iii. What specific website provided information related to (Brand) (prior to the conversation)? If more than one website was involved, please select the one that was most prominently discussed. Q6di-iii. Which search engine was used (prior to the conversation)?

Source: Google/KellerFay, Word of Mouth and the Internet Study, June 2011

# Smartphone Owners More Likely to Reference Media, Especially Internet

## Marketing/Media Referenced



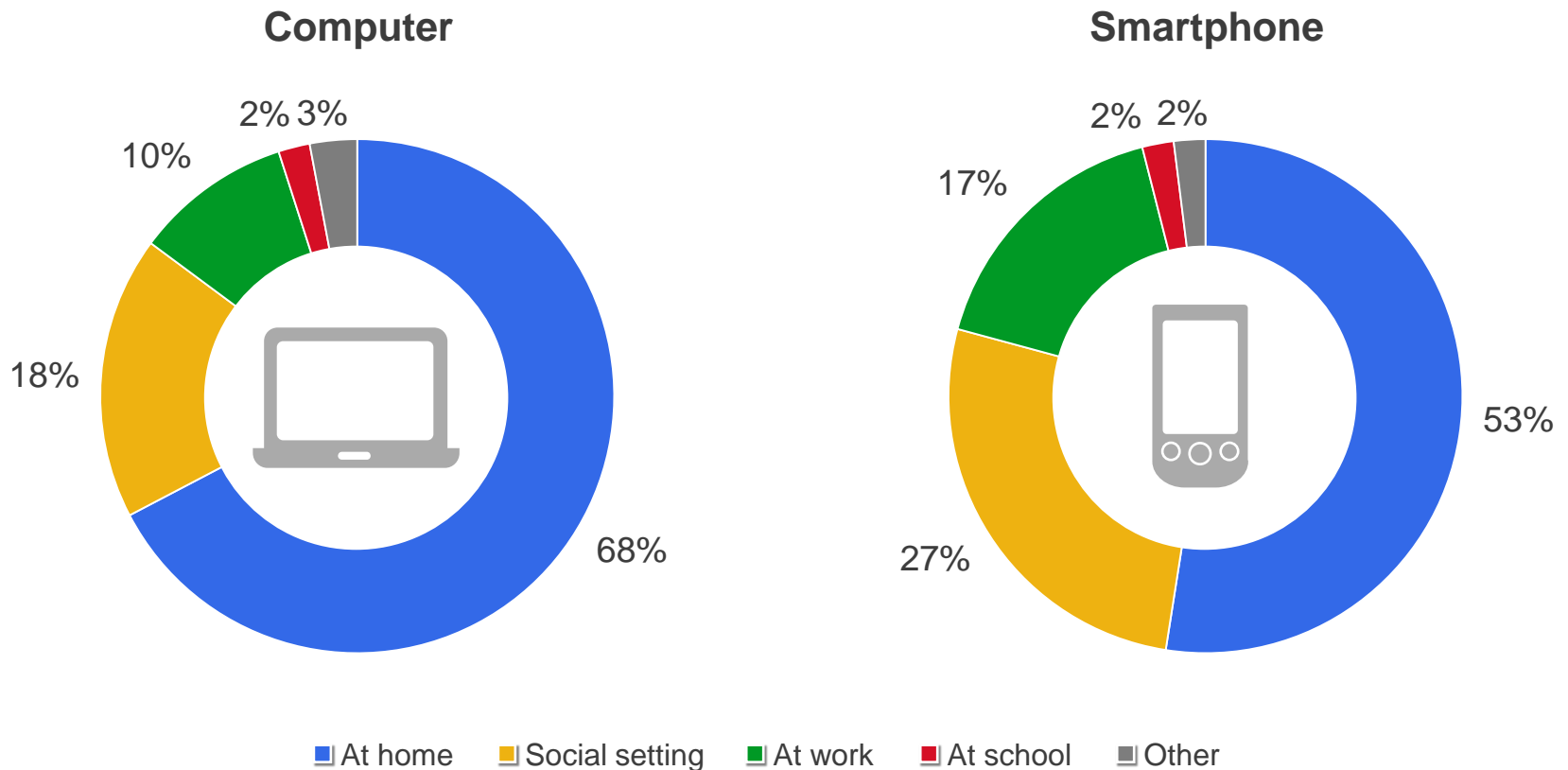
## Smartphone owners are...

- **13% more likely** to refer to media heard/seen prior to the conversation
- **50% more likely** to reference having seen/heard something on the internet before a conversation
- **13% follow up** a brand conversation with a search
- **11% access the Internet** via their phone during a conversation talking about a brand

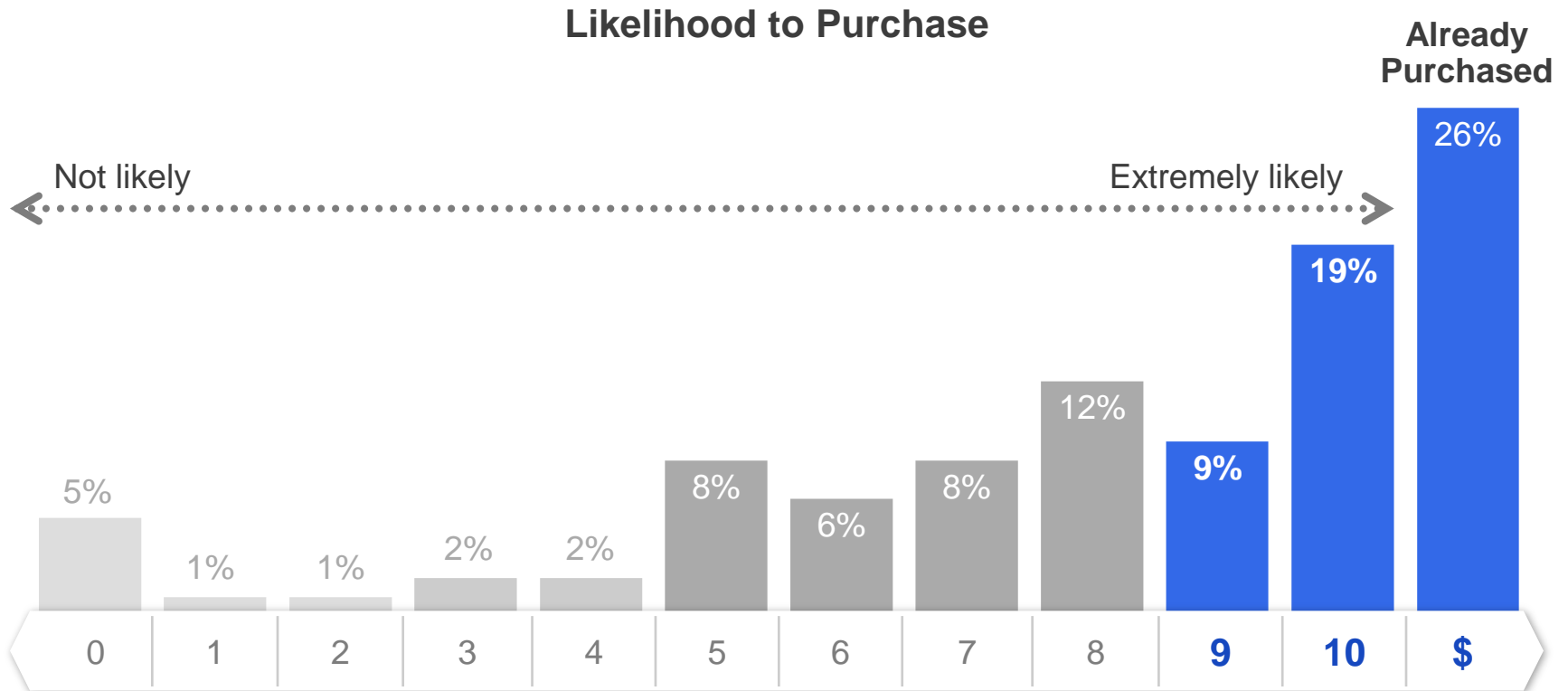
Base: Brand Conversations (All Categories: Smartphone Owners, n=2,449; Non-Smartphone Owners, n=4,298) Q5a. Did anyone in the conversation (including yourself) refer to something they saw or heard prior to the conversation about (Brand) from and of these sources? Which? Please select all that apply. Q5b. Did anyone in the conversation (including yourself) refer to something they saw or heard during the conversation about (Brand) from and of these sources? Which? Please select all that apply.\* Respondents are able to select up to two media/marketing sources, so percentages do not add to the top summary row. Source: Google/KellerFay, Word of Mouth and the Internet Study, June 2011 Base: Brand Conversations (All Categories: Smartphone Owner, n=2,449; Non-Smartphone Owner, n=4,298) Q6ai-iii. What specific website provided information related to (Brand) (prior to the conversation/during the conversation/after the conversation)? If more than one website was involved, please select the one that was most prominently discussed. Q6di-iii. Which search engine was used (prior to the conversation/during the conversation/after the conversation)? Source: Google/KellerFay, Word of Mouth and the Internet Study, June 2011

# Most Conversations Involving the Internet Still Take Place at Home

Location of Brand Conversations By Type of Device Used to Access Internet BEFORE, DURING, or AFTER the Conversation



# WOM Conversations Lead to Purchase Intent



More than half of consumers say they are “highly likely” to purchase an item based on WOM

Base: Brand mentions where someone else provided advice, (All Categories, n=4,484)

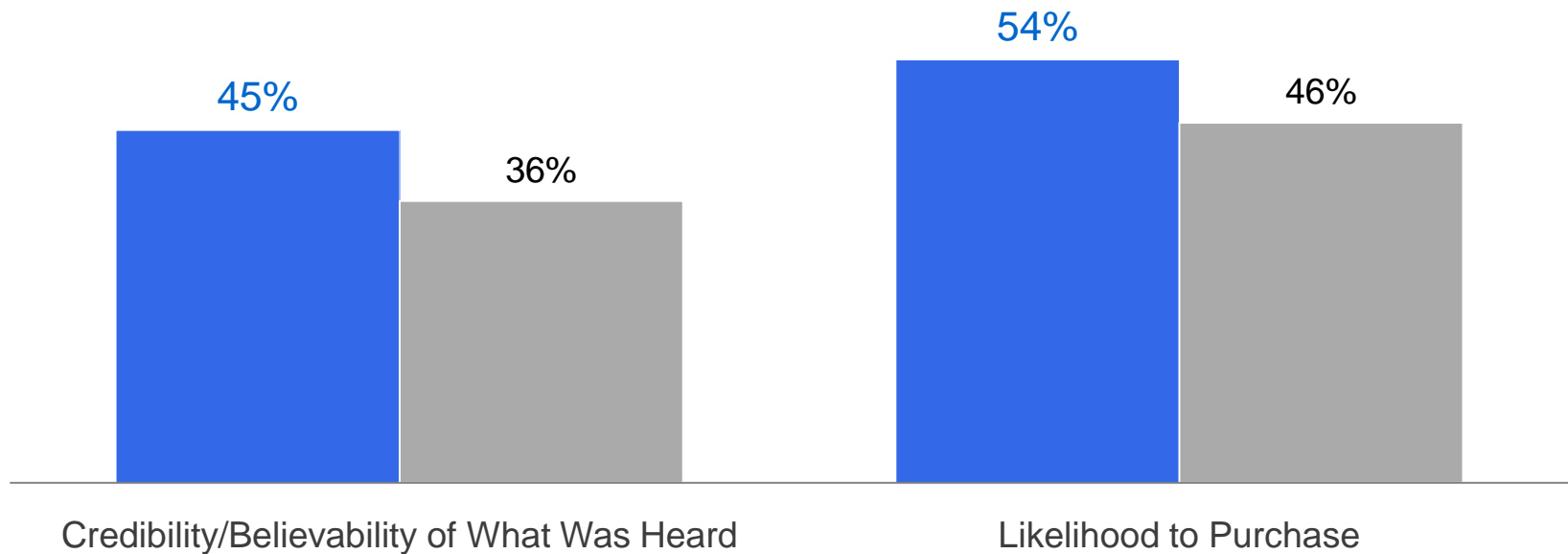
Q14. Again, on a scale of 0 to 10 where 0 is not at all likely and 10 is extremely likely, how likely is it that you will purchase the brand or buy something from that company, based on what you heard from other people in that conversation? If you already purchased it, please answer Already purchased.

Source: Google/KellerFay, Word of Mouth and the Internet Study, June 2011

# Search is Most Credible and Likely to Lead to Purchase

**Credibility of WOM & Likelihood to Purchase Based on WOM:**  
“9” or “10” or “Already Purchased” on 0–10 Point Scale

■ Referencing Search (NET) ■ Referencing Social Media (NET)



**Conversations referencing search are seen as more credible and more likely to lead to purchase than social media.**

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