

DATA MEMO

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RE: The popularity and importance of search engines

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The use of search engines is a top online activity and Americans increasingly feel they get the information they want when they perform search queries

On the probable eve of Google's initial public offering, new surveys and traffic data confirm that search engines have become an essential and popular way for people to find information online. A nationwide phone survey of 1,399 Internet users between May 14 and June 17 by the Pew Internet & American Life Project shows:

- 84% of online Americans have used search engines – that translates into more than 107 million people. On any given day online, more than half those using the Internet use search engines. And more than two-thirds of Internet users say they use search engines at least a couple of times per week.
- The use of search engines usually ranks only second to email use as the most popular activity online. During periods when major news stories are breaking, the act of getting news online usually surpasses the use of search engines.
- There is a substantial payoff as search engines improve and people become more adept at using them. Some 87% of search engine users say they find the information they want most of the time when they use search engines.
- The convenience and effectiveness of the search experience solidifies its appeal. Some 44% say that most times they search they are looking for vital information they absolutely need.

comScore Networks tracking of Internet use shows that among the top 25 search engines:

- Americans conducted 3.9 billion total searches in June
- 44% of those searches were done from home computers, 49% were done from work computers, and 7% were done at university-based computers.
- The average Internet user performed 33 searches in June.

- The average visit to a search engine resulted in 4.4 searches.
 - The average visitor scrolled through 1.8 result pages during a typical search.
 - In June, the average user spent 41 minutes at search engine sites.
 - comScore estimates that 40-45 percent of searches include sponsored results.
 - Approximately 7 percent of searches in March included a local modifier, such as city and state names, phone numbers or the words “map” or “directions.”
 - The percentage of searches that occurred through browser toolbars in June was 7%.
 - Search engine market share data are available upon request.
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Popularity of search

Pew Internet Project research over the years has consistently shown that the use of search engines is one of the most popular online activities. During most months, the act of using a search engine is second only to email as the most frequently performed Internet activity. (During periods when major news stories occur, the act of getting news online surpasses search engines by a small margin. But nothing in our research has ever come close to matching the popularity of email.)

Some 84% of Internet users, more than 107 million Americans, report that they have used search engines. The volume of searches is impressive. comScore data show that an average Internet user performs 33 searches per month, adding up to well over 3.9 billion searches overall per month on the Internet’s 25 most popular search engines.

Pew Internet Project data show that on any given day, more than half of all Internet users who are online will use a search engine. About 64 million American adults are online on a typical day and more than 38 million of them are using search engines.

Moreover, the frequency of searching is impressive, too. More than a third of searchers (35%) report they launch a search at least once a day, (with two-thirds of that group reporting that they use search engines several times a day.) Another third search a number of times during the week (half search 1 – 2 days a week and half search 3 – 5 days a week). The final third search less frequently than that.

Positive search experiences and impressions

Asked about their experiences and sentiments when using search engines, most Americans express satisfaction, trust, and self-confidence. Some 87% of search engine users say they find the information they are seeking most of the time they perform searches. About 20% of that group say they are always successful. More than two thirds of search engine users (68%) say they consider search engines a fair and unbiased source of information. And search engine users applaud themselves as well. A whopping 92% of searchers express confidence in their skills as searchers – over half of them say they are “very confident” they can accomplish what they want when they perform an online search.

The imperatives of search

The availability of reliable, easy-to-use search engines has transformed people's connection to information. For some, search engines are indispensable. Many people deeply rely on search engines to deliver vitally important information to them: 44% of searchers say that all or most of the searches they conduct are for information they absolutely need to find.

These strong positive sentiments, coupled with a seriousness of purpose, lead a third of searchers to say they couldn't live without Internet search engines. About half of searchers, while fans of search engines, are less dramatic; they say they like using search engines, but they could go back to other ways of finding information if they had to.

Good news for Google

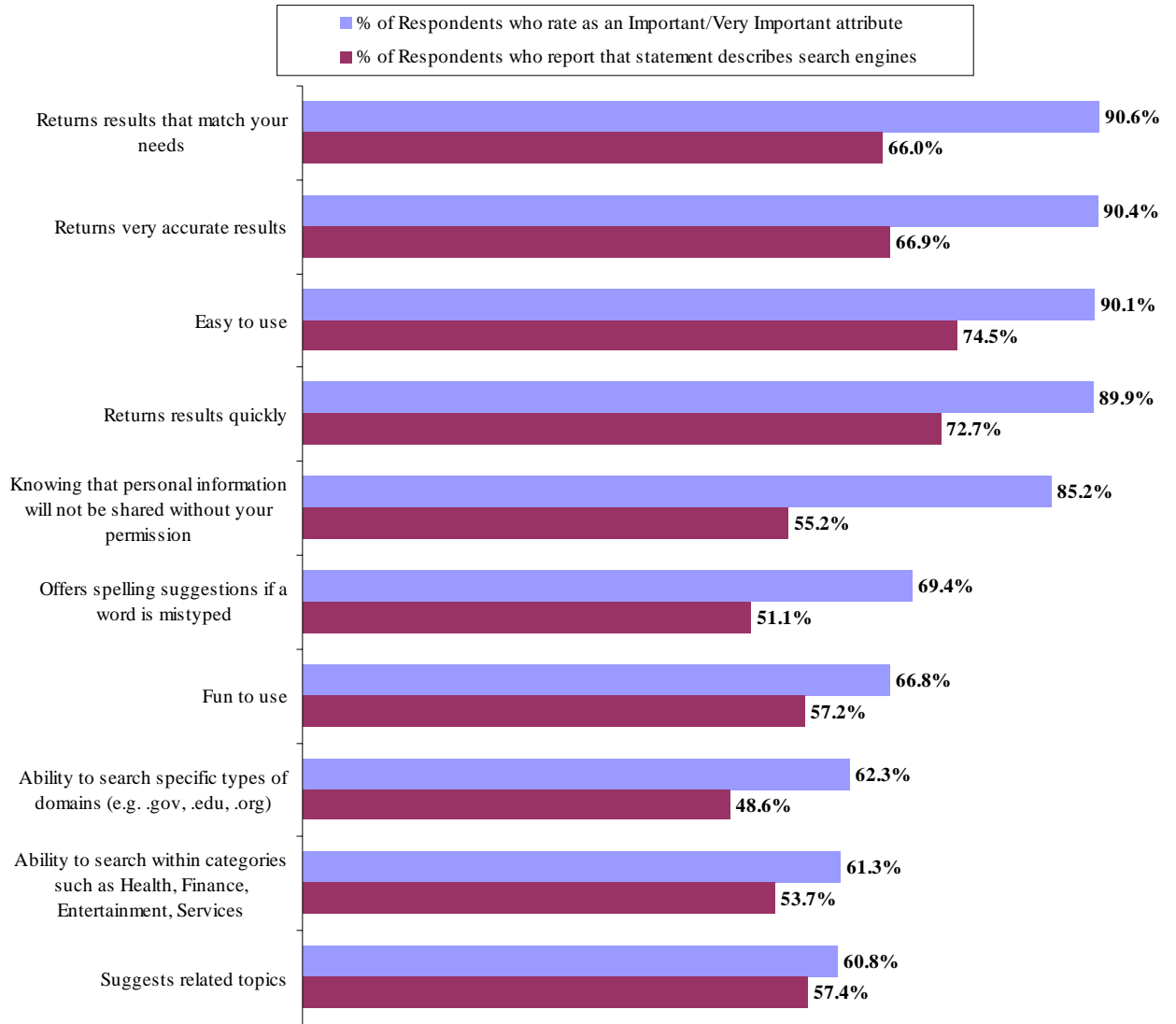
For Google, customer satisfaction runs deep. In this survey 47% say that Google is their top choice of search engine, followed by Yahoo, the search engine of choice for 26% of users. Customer loyalty is strong: 44% of users say they use a single search engine, and 48% say they use 2 or 3.

According to a February analysis by comScore, Google users conducted an average of 56% percent of their searches at Google. Yahoo! users conducted 43% of their searches at Yahoo!, while MSN users turned to MSN for 26% of their searches.

As part of a survey to understand customer satisfaction among search engine users, comScore asked participants which search attributes are most important to them and how the search engines they use most often rated on each of these attributes. The survey found that while users' overall satisfaction levels with search engines are relatively high, there are significant gaps between respondents' most important attributes and the perceived performance of search engines in these areas. For example, 91% of respondents rated "Returns results that match your needs" as either important or very important, but only 66% reported that this statement describes their favorite engines. The biggest gap between attribute importance and the extent to which the search engines are perceived to deliver is "Knowing that personal information will not be shared without permission." Fully 85% of users rate this as an important attribute, but only 55% believe search engines deliver.

Importance of Search Engine Attributes vs. Perceived Performance by Search Engines

Source: comScore Networks



Questionnaire

May/June 2004 Tracking Survey

Final Topline

6/22/04

Data for May 14 – June 17, 2004

Princeton Survey Research Associates International
for the Pew Internet & American Life Project

Sample: $n = 2,200$ adults 18 and older

Interviewing dates: 05.14.04 – 06.17.04

Margin of error is plus or minus 2 percentage points for results based on the full sample

Margin of error is plus or minus 3 percentage points for results based on Internet users (N=1,399)

Please tell me if you ever do any of the following when you go online. Do you ever.../Did you happen to do this **yesterday**, or not?

Use an online search engine to help you find information on the web:

Based on Internet users [N=1,399]

	Total Internet users who have done this	Yes, went online yesterday	No, did not go online yesterday	Don't know/refused
Current	84	30	16	*
Jan 2002	85	29	14	1

I have a few questions about how you use online search engines...

SE1 First, how often do you use search engines to find information online? Several times a day, about once a day, 3-5 days a week, 1-2 days a week, once every few weeks, or less often?

Based on Internet users who have used a search engine [N=1,165]

CURRENT		
%	23	Several times a day
	12	About once a day
	18	3-5 days a week
	18	1-2 days a week
	15	Every few weeks
	14	Less often
	*	Don't know/Refused

SE2 How many different search engines do you use on a regular basis? (READ 1-3)

Based on Internet users who have a used a search engine [N=1,165]

	<u>CURRENT</u>	
%	44	Just one
	48	Two or three
	7	More than three
	1	(VOL) None/Don't use any search engines on a regular basis
	1	Don't know/Refused

SE3 Which search engine do you use MOST OFTEN?

Based on Internet users who have a used a search engine [N=1,165]

	<u>CURRENT</u>	
%	47	Google
	26	Yahoo
	7	MSN
	5	AOL
	2	AskJeeves
	1	Netscape
	4	Other
	1	None/Don't use any one engine more than others
	7	Don't know/Refused

SE4 How much do you, personally, rely on Internet search engines as a way of finding information? Would you say...

Based on Internet users who have a used a search engine [N=1,165]

	<u>CURRENT</u>	
%	32	You couldn't live without Internet search engines
	50	You like using Internet search engines, but could go back to other ways of finding information
	17	You wouldn't really miss Internet search engines if you could no longer use them
	1	Don't know/Refused

SE5 Thinking about your own Internet searches...How much of the information you search for online is information that you absolutely NEED TO FIND, for instance to accomplish an important task or answer an urgent question you have?

Based on Internet users who have a used a search engine [N=1,165]

	<u>CURRENT</u>	
%	12	All
	32	Most
	31	Some
	24	Very little
	1	Don't know/Refused

SE6 How much of the information you search for online is information that you wouldn't bother looking up if you didn't have access to an Internet search engine?

Based on Internet users who have a used a search engine [N=1,165]

	<u>CURRENT</u>	
%	8	All
	25	Most
	41	Some
	24	Very little
	2	Don't know/Refused

SE7 In general, do you think Internet search engines are a fair and unbiased source of information, or do you think search engines are not a fair and unbiased source?

Based on Internet users who have a used a search engine [N=1,165]

	<u>CURRENT</u>	
%	68	Yes, fair and unbiased source of information
	19	No, not fair and unbiased source
	5	(VOL) Depends
	8	Don't know/Refused

SE8 When you use a search engine to look for information online, how often do you actually FIND the information you're looking for?

Based on Internet users who have a used a search engine [N=1,165]

	<u>CURRENT</u>	
%	17	Always
	70	Most of the time
	11	Only some of the time
	1	Hardly ever
	1	Don't know/Refused

SE9 How confident do you feel about your own searching abilities when using a search engine to find information online?

Based on Internet users who have a used a search engine [N=1,165]

	<u>CURRENT</u>	
%	48	Very confident
	44	Somewhat confident
	6	Not too confident
	2	Not confident at all
	*	Don't know/Refused