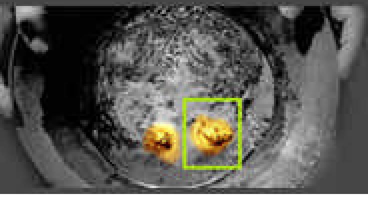


iProspect **Search Engine User Attitudes**

April-May 2004

Conducted by:

iProspect | 800 522 1152 / interest@iprospect.com / www.iProspect.com

Background

In order to gain a quantitative understanding of the Internet user community's attitudes toward search engine loyalty, the iProspect Search Engine User Attitudes Survey was developed through a partnership between iProspect, WebSurveyor, Stratagem Research and Survey Sampling International (SSI). This survey was developed as a follow-up to many of the questions asked in a survey fielded by iProspect in the summer of 2002 in partnership with Dick Morris Associates.

Methodology

Survey participants were recruited from among a panel of nationwide participants from SSI's SurveySpot, a multi-sourced panel of Internet users in the U.S. who are interested in participating in online research. SurveySpot members come from sources including: banner ads, online recruitment methods, and RDD telephone recruitment. SurveySpot members are recruited exclusively using permission-based techniques. SSI does not use unsolicited e-mail (or "spam") in building its SurveySpot panel.

SurveySpot panel demographics are not based on predictive techniques. They are created from self-reported, respondent-specific information. This has the advantage of giving researchers greater assurance of reaching the exact targets they seek. Panel size is monitored to prevent over-surveying as well as under-surveying in an effort to maintain panelists' interest in participating. Panelists are also offered rewards with each survey invitation, increasing their likelihood of participation.

For the iProspect Survey on Search Engine User Attitudes, a random sampling of 13,555 SSI SurveySpot members was solicited. At the suggestion of the market research professionals at Stratagem Research, an independent market research firm, an incentive of $100 to 10 randomly selected respondents was offered, resulting in 1,649 responses, or 12% of those solicited. SSI invited SurveySpot panelists to then take the survey at a website built using WebSurveyor's online surveying capabilities. SSI does not collect the data, since SSI works within a non-compete position in the marketing research process.

Initial survey questions were developed by iProspect as a follow-up to, and expansion of, its 2002 survey, with the questions being vetted by the research professionals at Stratagem Research. Data was collected by the WebSurveyor online tool and analyzed by both iProspect's research department and Stratagem Research.

A sample size of 1649 for a population of 170 million (U.S. internet users) represents a 2.41% margin of error with 95% confidence level or a 3.18% margin of error with 99% confidence level.

Respondent Demographics

A nationwide survey within the U.S. produced 1,649 responses.

Gender
- 49.9% Male
- 50.1% Female

Average age
- 45 years

Ethnicity
- White (77.7%)
- Black (4.1%)
- Asian (2.1%)
- Indian (1.5%)
- Hispanic (1.6%)

College Degree
- 55.9%

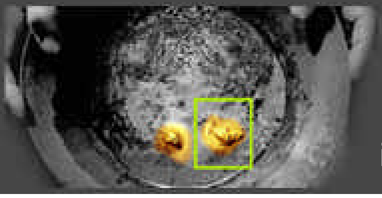
Married
- 57.9%

Employment
- 69.6% employed
- 12% are homemakers / students

Mean household income
- $40,000 to $49,999

Respondent Internet Usage

89.7% of the respondents surf the Internet at least once a day.
77.0% of the respondents surf at home.
83.1% have been on the Internet for at least 4 years.
56.5% are connected at high speed (>56K).
71.0% spend 10 or more hours a week on the Internet.



Key Findings

1. Search engines are used frequently by Internet users.
56.3 % of respondents said they used search engines at least once a day

2. Search engine loyalty exists within the Internet user community.
56.7% of respondents said they usually use the same search engine.

3. There has been significant Internet user adoption of search engine toolbars.
49.3% of respondents have installed at least one of the search toolbars from the major search engines: Google, Yahoo! and MSN.

4. Internet users rarely read beyond the 3rd page of search results.
81.7% of respondents will try a new search if they aren't satisfied with the listings they find within the first 3 pages of results.

5. Homemakers, more than any other profession identified, stop looking at search results after the first page.
52.2% of homemakers who responded said they don't review more than the first page of search results.

6. Those Internet users who are unemployed stop looking at search results after the first page more than full-time or part-time employees.
44.3% of unemployed people who responded said they don't review more than the first page of search results.

7. The older the Internet user the more he/she will stop looking at search results after the first page.
49.4% of Internet users over the age of 60 who responded said they don't review more than the first page of search results.

8. Females dig less deep into search results than males.
15.2% more females abandon their review of search results after the first page than males do.

9. Search engines users find natural ("organic" or "algorithmic") search results to be more relevant to their searches.
60.5 % of respondents picked a natural search result as the one they found most relevant to a sample query.

10. Users of Google and Yahoo! find natural ("organic" or "algorithmic") search results to be especially relevant to their searches.
60.8% of respondents who use Yahoo! and 72.3% of respondents who use Google picked a natural search result as the one they found most relevant to a sample query.

11. Users of MSN find "paid search advertisements" to be more relevant to their searches.
71.2% of respondents who use MSN picked a paid search advertisement as the one they found most relevant to a sample query.

12. Users of AOL find natural ("organic" or "algorithmic") search results and "paid search advertisements" to be equally relevant to their searches.
50.0% of respondents who use AOL picked a natural search result and 50.0% of respondents picked a paid search advertisement as the one they found most relevant to a sample query.

13. Women find paid search ads more relevant to their searches than men.
43.1% of female respondents picked a paid search advertisement as the search result they found most relevant to a sample query, while just 34.6% of men selected a paid search ad as most relevant.

14. College graduates find natural ("organic" or "algorithmic") search results to be more relevant than non-graduates.
64.8% of respondents who were college graduates picked a natural search result as the one they found most relevant to a sample query, while just 56.2% of those who did not graduate college identified a natural search result a most relevant.

15. Search engine users who are fully employed find natural ("organic" or "algorithmic") search results to be more relevant than users who are unemployed or employed part-time.
64.5% of respondents who are employed full-time selected a natural search result as the one they found most relevant to a sample query, while 60.8% of users employed part-time found these results most relevant, and just 55.1% of unemployed respondents chose a natural search result.

16. Frequent users of the Internet find natural ("organic" or "algorithmic") to be more relevant to their searches.
65.2% of respondents who use the Internet 4 or more times a day picked a natural search result as the one they found most relevant to a sample query, while just 56.3% of those who use the Internet less than 4 times per day clicked on a natural search result.

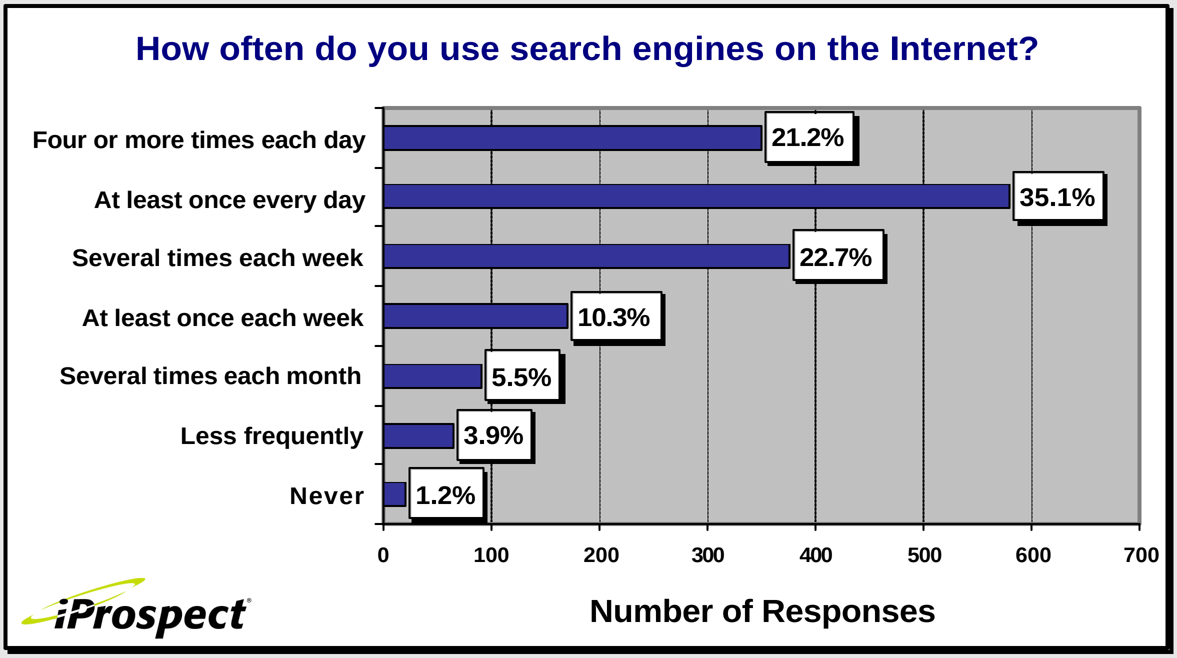
17. Those who have been using the Internet longer find natural ("organic" or "algorithmic") results to be more relevant to their searches.
63.2% of respondents who have used the Internet for more than 6 years picked a natural search result as the one they found most relevant to a sample query, with 60.6% of those who have used the Internet less than 4-6 years clicked on a natural search result, while just 53.5% of users with 0-3 years of Internet experience chose a natural search result.

Detailed Findings

1. Search engines are used frequently by Internet users.

In response to the question:
"How often do you use search engines on the Internet?"

35.1% responded that they used search engines at least once a day, with another 21.2% (56.3% cumulative) responding that they used search engines 4 or more times a day. Adding those who use search engines multiple times a week (22.7%) our cumulative total reaches 79.0%. From these figures the iProspect Survey Search Engine User Attitudes Survey indicates that search engine usage is a frequent, rather than infrequent, activity – and that this user sampling was familiar with the search engines and viewing search engine results.

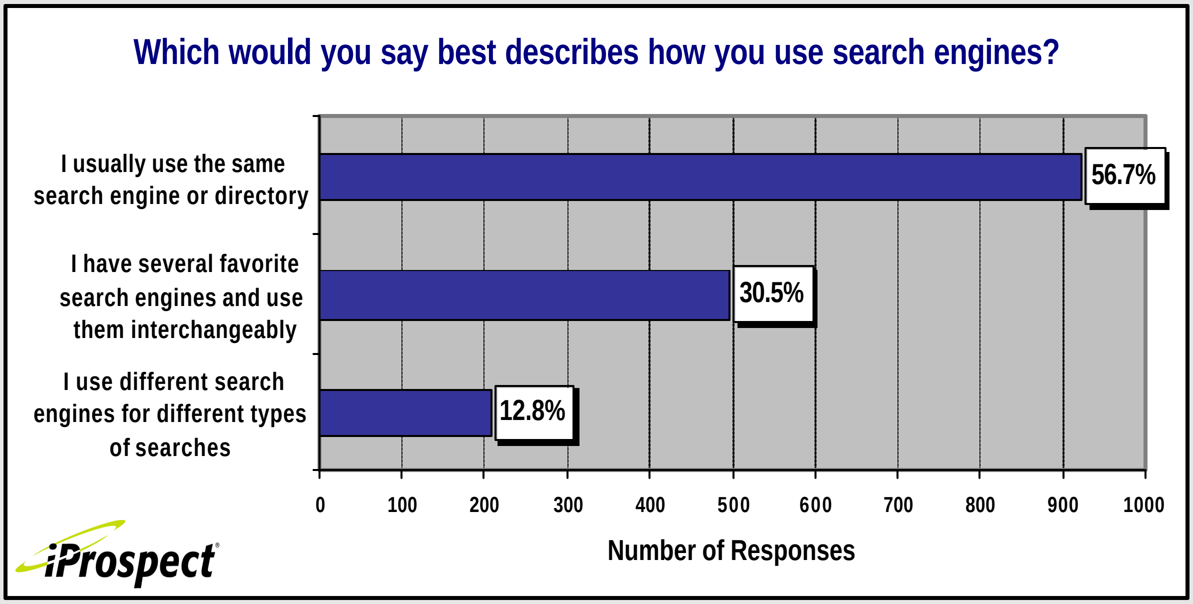


It should be of very little surprise that 98.8% of Internet users report using search engines – something that many industry pundits have intuitively felt was the case. What' is interesting is that there's been very little change from the 77.5% of Internet users who reported using search engines at least several times a week in iProspect's 2002 Survey, and the 79.0% who report the same frequency of use in this most recent survey. Seems at least frequency of use is remaining flat.

2. Search engine loyalty exists within the Internet user community.

In response to the question:
"Which would you say best describes how you use search engines?"

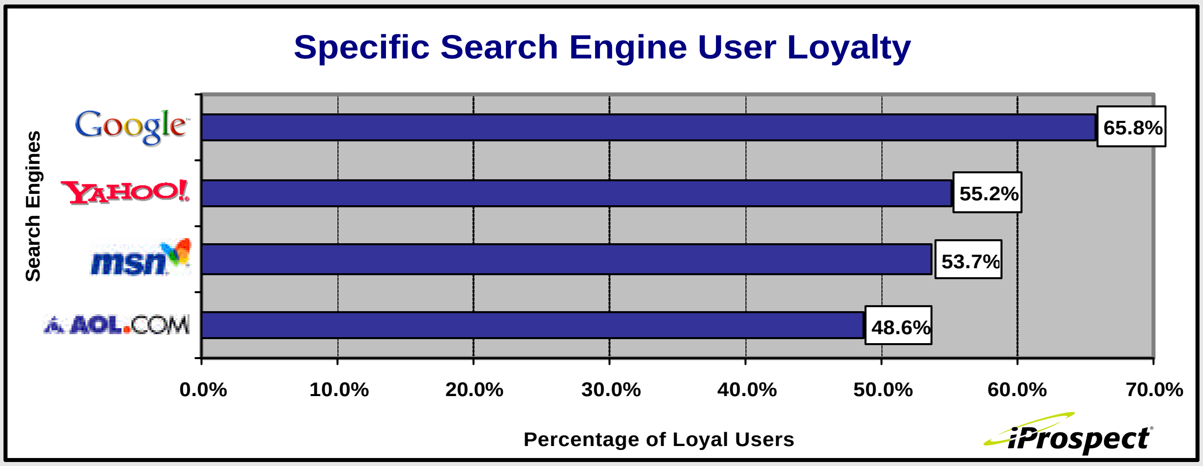
56.7% responded that they usually use the same search engine, with 30.5% who have several favorite search engines (87.2% cumulative), and just 12.8% who use different search engines for different types of searches.



In addition, specific search engines appear to have more loyal users than others, for when we used the Websurveyor's data analysis functionality to cross-tab the responses to the question on the previous page with the responses to this question…

In response to the question:
"Which one search engine do you use the most often?" – cross-tabbed with those whose answer to the previous question was "I usually use the same search engine or directory."

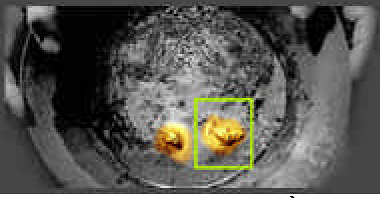
It was discovered that 65.8% of respondents who said they use Google most often usually use only one search engine, with 55.2% of those who prefer Yahoo! only using one engine, 53.7% of MSN users demonstrating loyalty with AOL netting 48.6% users who only use one search engine.



The iProspect Survey Search Engine User Attitudes Survey also found that 91.0% of respondents would modify, and then re-launch, a search using the same search engine used for their initial search after being dissatisfied with the first 3 pages of results returned by that initial search. This figure is up dramatically from the 71% reported in iProspect's 2002 Survey results, suggesting that overall satisfaction with search engine results quality has increased.

Conclusions are:

1. **Search engine loyalty exists.** Users usually use the same one or several search engines for all their searches regardless of the type of information being sought and – as Stratagem Research pointed out during our analysis – users tend to have more confidence in their search engine of choice than in their own ability to formulate a query that will return their desired results – choosing to re-launch a modified version of their original query in the same engine before giving up on that engine's ability to return satisfactory results.

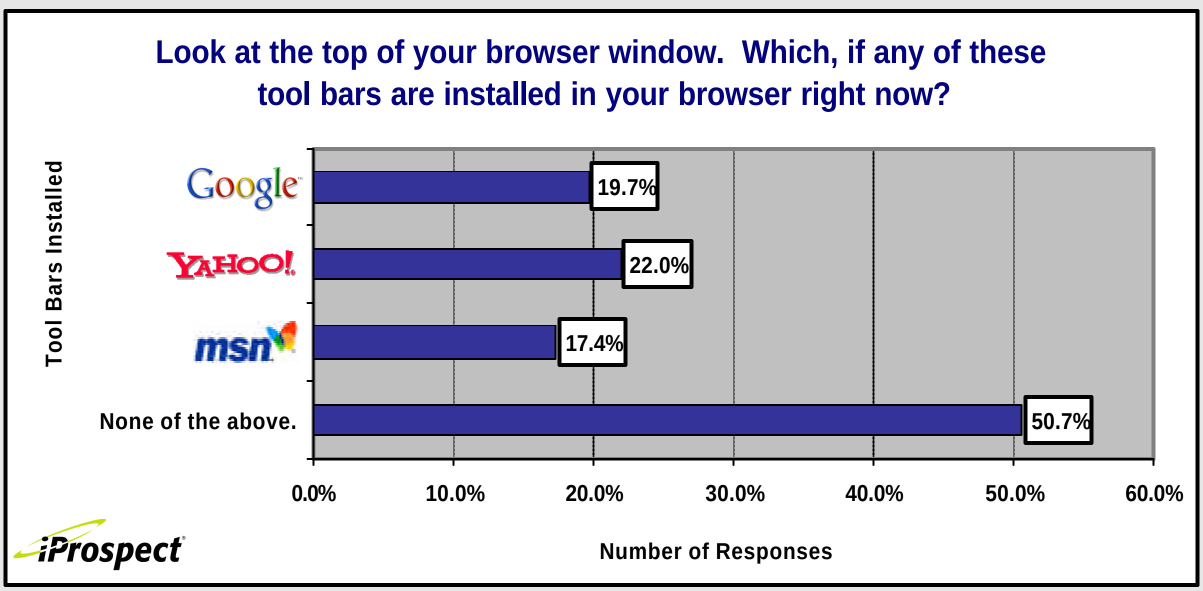


2. **Specific search engines have earned more loyalty than others.** iProspect feels those search engines that enjoy higher user loyalty should find ways to capitalize on that loyalty – by pointing out that fact to their current and potential advertises, for example. And those engines with less loyal followings have an opportunity to close the gap by taking steps to garner more loyalty than they are currently enjoying – perhaps by adding more free value-added user features, or improving the relevancy/accuracy of their search results to enhance the user experience.

3. There has been significant Internet user adoption of search engine toolbars.

In response to the question:
"Look at the top of your browser window. Which, if any of these tool bars are installed in your browser right now?"

Recognizing that respondents could choose more than one response, at least 49.3% of respondents have either the Yahoo! Search toolbar (22.0%), the Google search toolbar (19.7%) or the MSN search toolbar (17.4%) in their browser. Given that the alternative response to these was "none of the above" (50.7%) – which effectively included both "none" and "other" – this 49.3% figure represents the minimum adoption percentage for search tool bars in general.



Probably the biggest surprise of the survey is that nearly half of the respondents have at least one search tool bar installed in their browser, providing quick and easy access to the search engines without the need to open, or switch to, another browser. One can infer that this significant adoption rate and the ease of repeat use it provides has probably had a positive impact on overall search engine loyalty for those engines which offer tool bars.

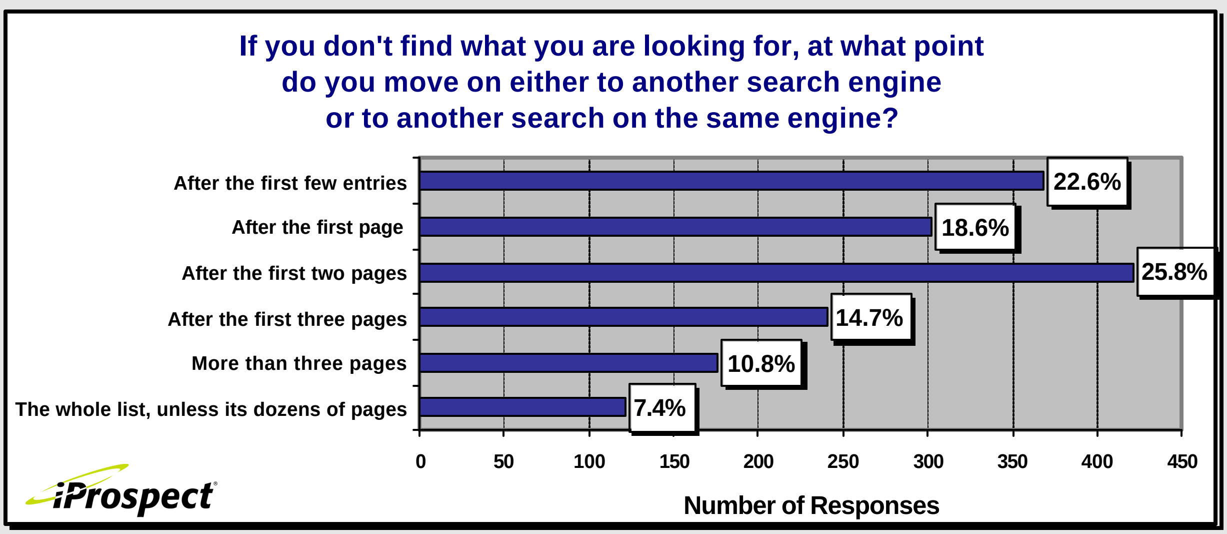
It should be noted, however, that the most frequently installed tool bar (Yahoo!) ranks second in end-user loyalty behind the number two most frequently installed tool bar (Google), which earned the top spot in terms of user loyalty.

Where we see significant opportunity for the search engines is with the 50+% of Internet users who have *not* yet installed a search tool bar. The engine(s) that is/are able to best attract that universe of potential users will most certainly increase their current market share, as well as garner additional user loyalty.

4. Internet users rarely read beyond the 3rd page of search results.

In response to the question:
"If you don't find what you are looking for, at what point do you move on either to another search engine or to another search on the same engine?"

22.6% try another search after reviewing the first few results, 18.6% after viewing the entire first page (41.2% cumulative), 25.8% abandon the first query after checking the first 2 pages (67.0% cumulative) and another 14.7% will wait until after viewing the first three pages before re-launching a query (81.7%).



These results tell marketers that failing to get your web pages into at least the first three pages of search results for keywords that relate to your products or services is equivalent to not having a website in the eyes of 80% of online users. Perhaps more critical, failing to be seen on the first page of results means over 40% of potential visitors will not find your site.

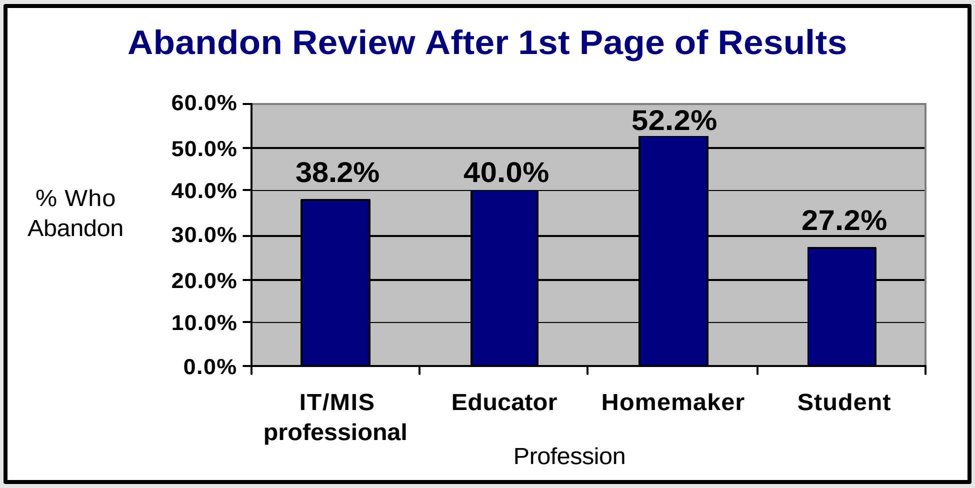
Figures from iProspect's 2002 survey were 48.0% abandoning after the first page (41.2% in this most recent survey) and 78.1% abandoned after 3 pages (81.7% in this most recent survey). But despite some fluctuation in first page abandonment, the need for websites to be found within the first 3 pages of search results has remained high and consistent.

Given the complexity of the algorithms used by the major search engines (that receive 98%+ of total searches) to rank search results, the constant changes being made to these algorithms as engines try to enhance the user experience with ever-more-relevant results, and the escalating costs of paying your way into the first page of results, these survey findings support the decision by many companies to contract with professional search engine marketing firms to manage the complexities of search engine marketing initiatives.

5. Homemakers, more than any other profession identified, stop looking at search results after the first page.

In response to the question:
"If you don't find what you are looking for, at what point do you move on either to another search engine or to another search on the same engine?"

52.2% of homemakers who responded said they don't review more than the first page of search results before moving on to another search engine or re-launching a modified search using the same search engine. Compare this to selected other professions identified: 40.0% of educators, 38.2% of IT/MIS professionals, and just 27.2% of students – all of whom were willing to dig deeper into search results than homemakers.

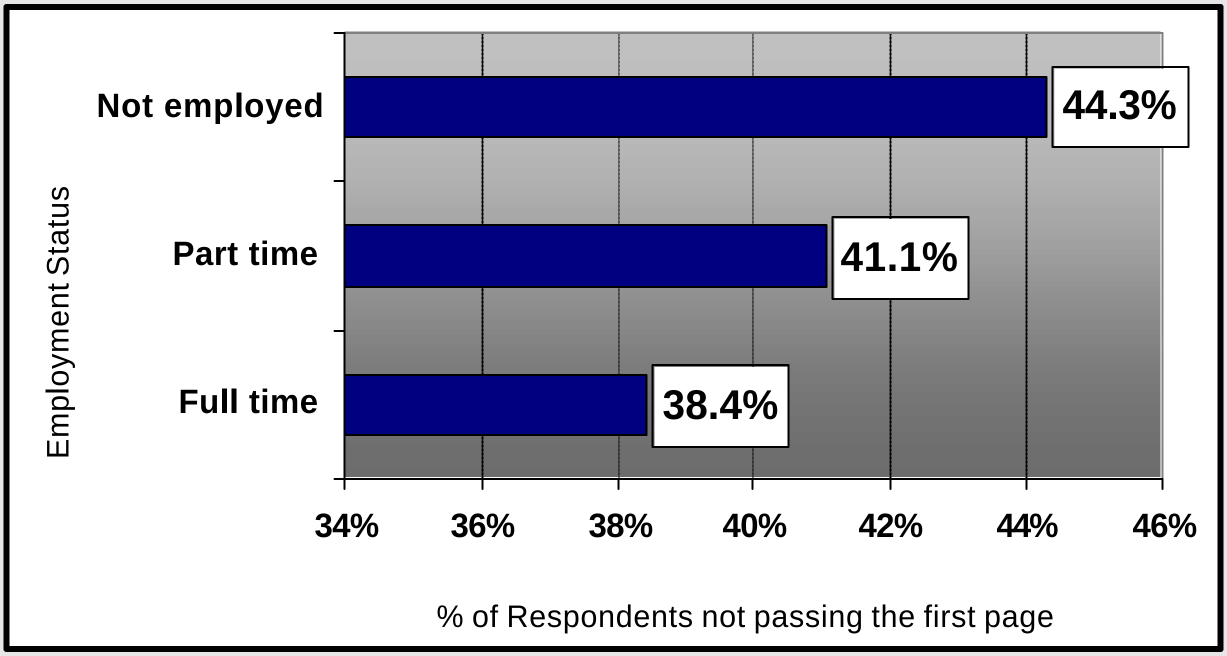


The survey sends a clear message about the importance of appearing on the first page of search engine results – and for certain demographics this was found to be extraordinarily true. The first of these demographics is profession or occupation. The iProspect Search Engine User Attitudes Survey discovered that over half of homemakers, more than any of the other occupations surveyed, choose to abandon their review of the web results after they have reviewed just the first page of search results. For sites like Homemakers.com, Tupperware.com, and BettyCrocker.com this means failing to appear in the top ten search results means over 50% of potential visitors, potential leads, and potential customers will never find your website for the majority of your targeted keywords.

6. Those Internet users who are unemployed stop looking at search results after the first page more than full-time or part-time employees.

In response to the question:
"If you don't find what you are looking for, at what point do you move on either to another search engine or to another search on the same engine?"

44.3% of unemployed respondents said they don't review more than the first page of search results before moving on to another search engine or re-launching a modified search using the same search engine. Compare this to part-time employees at 41.1% and full-time employees at just 38.4% – all of whom were willing to dig deeper into search results than unemployed users.



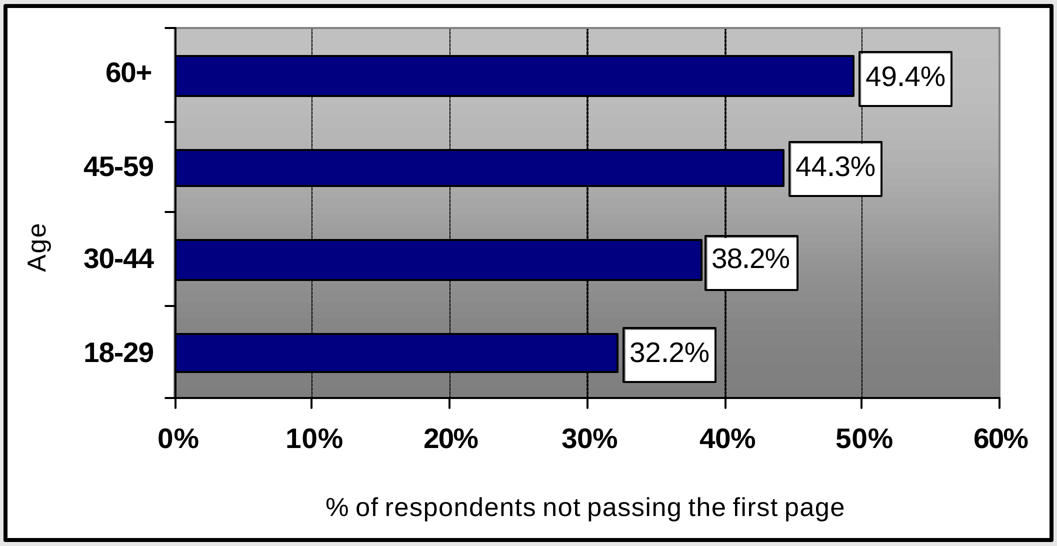
The second of the demographics that demonstrate a trend as to the depth to which people will review search results is employment status. The iProspect Search Engine User Attitudes Survey uncovered that unemployed and partially-employed Internet users choose to abandon their review of the web results after just the first page of results more than fully-employed users. For employment sites like Monster.com, Robert Half International, Manpower.com, Administarff.com, KellyServices.com, etc. – where a higher percentage of visitors are unemployed or underemployed than visitors of most other websites – this means it is even more critical to appear in the top ten search results.

This particular online marketplace is especially competitive, so the services of a search engine marketing professional services firm will likely be necessary to achieve top rankings.

7. The older the Internet user the more he/she will stop looking at search results after the first page

In response to the question:
"If you don't find what you are looking for, at what point do you move on either to another search engine or to another search on the same engine?"

49.4% of Internet 60+ year old users who responded said they don't review more than the first page of search results before moving on to another search engine or re-launching a modified search using the same search engine. This percentage shrinks with each successive age category: 44.3% of 45-59 year olds, 38.2% of 30-44 year olds, and just 32.2% of 18-29 year olds who responded stopped reviewing results after the first page.



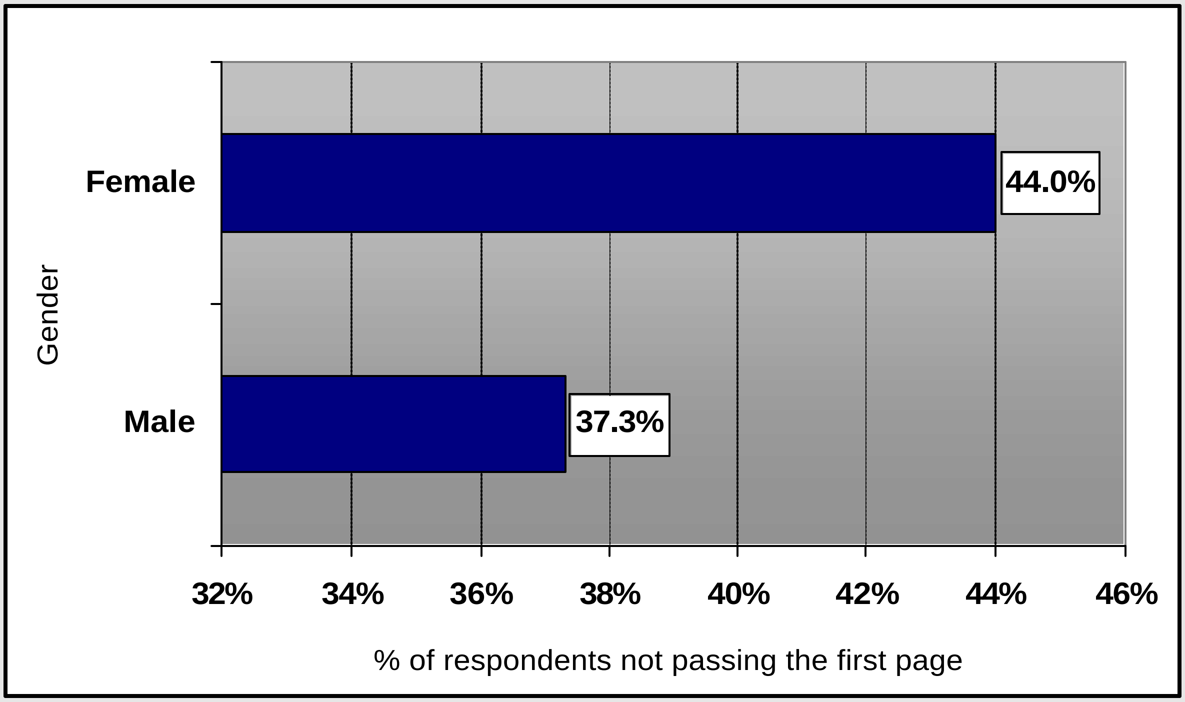
The third demographic trait that demonstrates a trend as to the depth to which people will review search results is the age of the Internet user. The iProspect Search Engine User Attitudes Survey revealed that users abandon reviewing search results in progressively greater numbers as they grow older.

On the extreme end of the spectrum, those marketing to older users seeking information about retirement planning or retirement destinations, as well as about drugs typically associated with those over 60 (MedcoHealth.com) need to be aware of the heightened need for their web pages to appear within the first page of results. On the opposite end, younger users checking out sites Hottopic.com, Alloy.com or Guess.com are more likely to go beyond the first page to find what they seek.

8. Females dig less deep into search results than males.

In response to the question:
"If you don't find what you are looking for, at what point do you move on either to another search engine or to another search on the same engine?"

44.0% of females who responded said they don't review more than the first page of search results before moving on to another search engine or re-launching a modified search using the same search engine, while only 37.3% of males respondents responded this way.



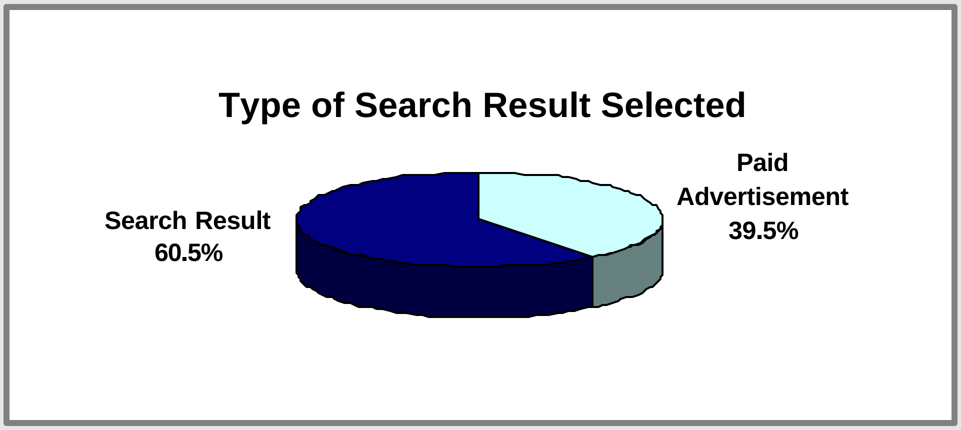
The fourth and final demographic trend as to the depth to which people will review search results is Internet user gender. The iProspect Search Engine User Attitudes Survey found that female users abandon reviewing search results 15.2% more than male users. This has huge implications for marketers of websites that focus primarily on information, products or services for women. From Avon.com to Linens 'n Things to PotteryBarn.com, websites within the extremely competitive personal care, cosmetics, home fashions and toys online markets need to strongly consider professionally-managed search engine marketing initiatives.

Failure to appear on the first page of results in these markets cedes 44% of the female market to competing sites which have found a way (most likely through an SEM firm) to gain visibility on the first page of search results.

9. Search engines users find natural ("organic" or "algorithmic") search results to be more relevant to their searches.

Survey respondents were first asked if they use one search engine more often than others. If they answered "yes," they were then asked which one they used most often. If they answered Google, Yahoo!, MSN or AOL, they were shown a sample page of search results from their preferred search engine and were asked to do the following:

"The screen below represents a sample search that was conducted on [name of their preferred search engine] using the keywords 'used cars' by an individual who is thinking about buying a used car. Based on the page of search results that are presented to you here, please indicate which individual search result is most relevant to this query by clicking on one of the search results below. Please remember that only one selection can be made."



Across the 4 search engines – Google, Yahoo!, MSN and AOL -- 60.5% clicked on a natural (or “organic” or “algorithmic”) search result, while 39.5% clicked on a paid search advertisement. For purposes of this survey, any listing within the natural search results that appeared as a result of a paid inclusion program was also considered a “natural” result – because its placement on the search results page was determined by the engine’s ranking algorithm, and not by the fact that money was paid for it to appear.

These results indicate that despite the amount of time, effort and money being invested by online marketers into paid search advertising, natural search results are clicked on more often than paid search advertisements by the vast majority of users of the 4 major search engines. These users account for over 90% of Internet searches.

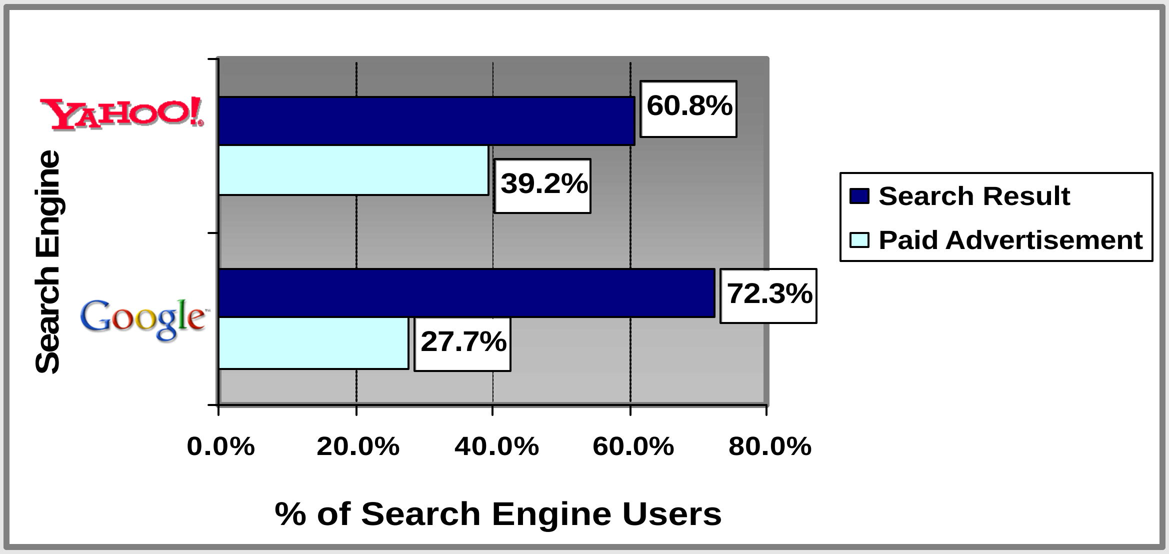
Marketers who are not yet investing in natural search engine optimization are potentially missing out on over 60% of the traffic and search audience they could be garnering on the keywords and phrases that are most relevant to the products or services they are marketing online. However, it should also be noted that marketers performing only natural search engine optimization would be well advised to also participate in paid search advertising, as almost 40% of search engine users find such results more relevant to their queries.

The select few search engine marketing firms that offer both natural search engine optimization and paid search advertising management can ensure that their clients’ Web pages are consistently found in both the natural search results of all the major search engines, and that their clients use both paid inclusion and paid search advertising (a.k.a. pay per click or PPC) programs judiciously – ensuring that investments are only made in keywords that produce a positive ROI.

10. Users of Google and Yahoo! find natural (“organic” or “algorithmic”) search results to be especially relevant to their searches.

Survey respondents were first asked if they use one search engine more often than others. If they answered “yes,” they were then asked which one they use most often. If they answered Google, Yahoo!, MSN or AOL, they were shown a sample page of search results from their preferred search engine and were asked to do the following:

“The screen below represents a sample search that was conducted on [name of their preferred search engine] using the keywords ‘used cars’ by an individual who is thinking about buying a used car. Based on the page of search results that are presented to you here, please indicate which individual search result is most relevant to this query by clicking on one of the search results below. Please remember that only one selection can be made.”



60.8% of Yahoo! users selected a natural search result as most relevant to the sample query, against 39.2% who picked a paid search advertisement. For Google users the gap was even wider, with 72.3% clicking on a natural result, and just 27.7% choosing a paid advertisement.

Identifying reasons why natural search results were considered significantly more relevant on these two engines than on others would be speculative, but that speculation would include the possibility that Google and Yahoo! give more prominence, and therefore emphasis, to the natural search results than the paid search advertisements. Additionally, the paid search advertisements might be more clearly identified as sponsored content on these engines, causing more of those users who are distrustful of ads to avoid clicking them.

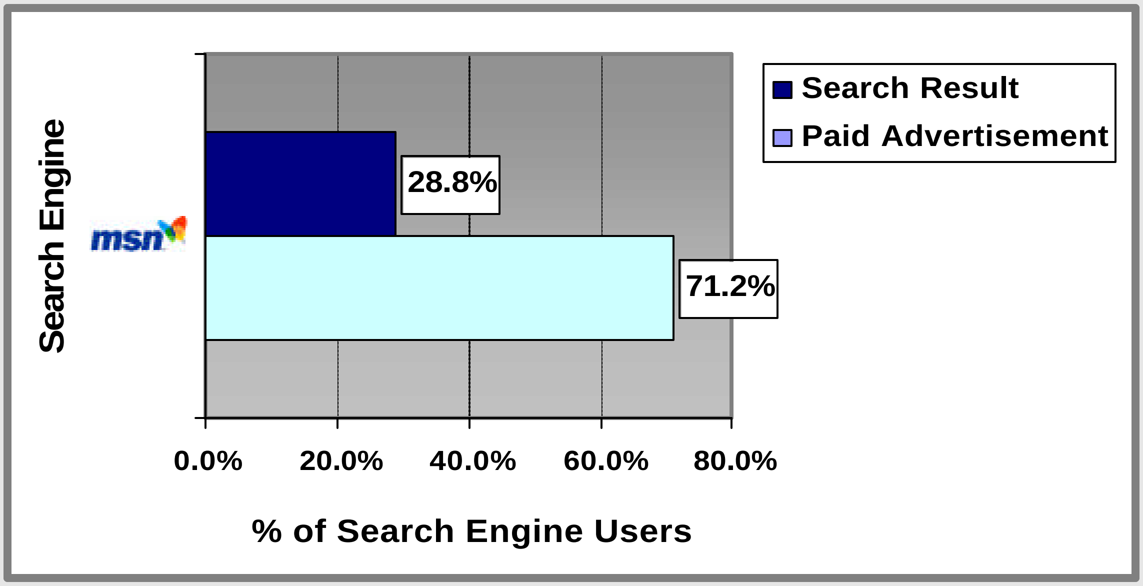
Regardless of the reason, clearly – more than the other major search engines – it is vital for online marketers to ensure that their Web pages are found in natural search results of Google and Yahoo!, or miss out on the majority of search clicks and resulting traffic from the users of those two dominant (by market share) search properties.

Once again, search engine marketing firms that integrate both natural search engine optimization and paid search advertising management can ensure that their clients' Web pages are consistently found in both the natural search results of Google and Yahoo!, and that their clients use both paid inclusion and paid search advertising (a.k.a. pay per click or PPC) programs wisely – so ongoing investments are made only in keywords that produce a positive ROI.

11. Users of MSN find "paid search advertisements" to be more relevant to their searches.

Survey respondents were first asked if they use one search engine more often than others. If they answered "yes," they were then asked which one they use most often. If they answered Google, Yahoo!, MSN or AOL, they were shown a sample page of search results from their preferred search engine and were asked to do the following:

"The screen below represents a sample search that was conducted on [name of their preferred search engine] using the keywords 'used cars' by an individual who is thinking about buying a used car. Based on the page of search results that are presented to you here, please indicate which individual search result is most relevant to this query by clicking on one of the search results below. Please remember that only one selection can be made."



71.2% of MSN users selected a paid search advertisement as most relevant to the sample query, against 28.8% who picked a natural search result. This is almost the complete opposite finding as that for users of Google.

As with the findings surrounding natural search results, identifying the reasons why paid search advertisements were considered significantly more relevant on MSN than on other search engines would be speculative, but that speculation would include the possibility that the paid search advertising content appearing in MSN might be less clearly identified causing less of those users who are distrustful of ads to avoid clicking them, or that paid search advertisements are given more emphasis by being displayed more prominently in the search results than the other search engines.

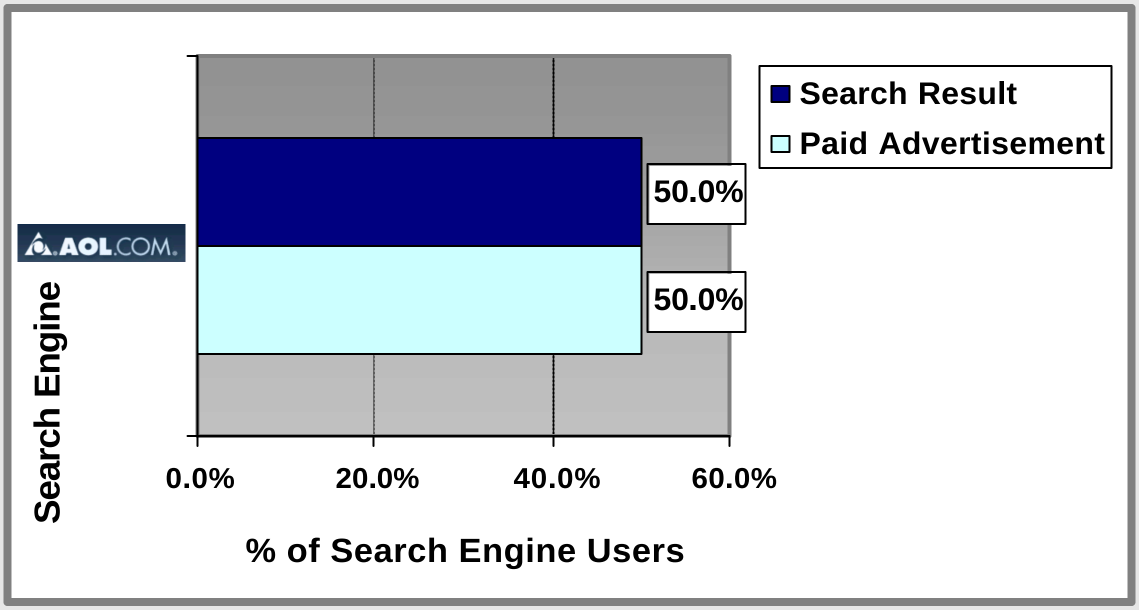
Regardless of the reason, it is clearly more important for online marketers to ensure that their Web pages are found in the paid search advertisements on MSN than within its natural search results -- or miss out on the vast majority of clicks, and resulting traffic, from the users of this major search engine.

Search engine marketing firms offering both natural search engine optimization and paid search advertising management can ensure that their clients' Web pages are consistently found in both the natural search results of MSN and that their clients use paid search advertising (a.k.a. pay per click or PPC) programs effectively and judiciously – ensuring that investments are only made in keywords that produce a positive ROI.

12. Users of AOL find natural ("organic" or "algorithmic") search results and "paid search advertisements" to be equally relevant to their searches.

Survey respondents were first asked if they use one search engine more often than others. If they answered "yes," they were then asked which one they use most often. If they answered Google, Yahoo!, MSN or AOL, they were shown a sample page of search results from their preferred search engine and were asked to do the following:

"The screen below represents a sample search that was conducted on [name of their preferred search engine] using the keywords 'used cars' by an individual who is thinking about buying a used car. Based on the page of search results that are presented to you here, please indicate which individual search result is most relevant to this query by clicking on one of the search results below. Please remember that only one selection can be made."



50.0% of AOL users selected a natural search result as most relevant to the sample query, and 50.0% picked a paid search advertisement.

Identifying reasons why natural search results and paid search advertising were considered equally relevant by users of AOL would be speculative, but that speculation would include the possibility that paid advertisements might be more clearly identified as such on AOL than on some engines and less clearly than others and that paid search and natural search are given equal prominence or emphasis in the layout of the search results.

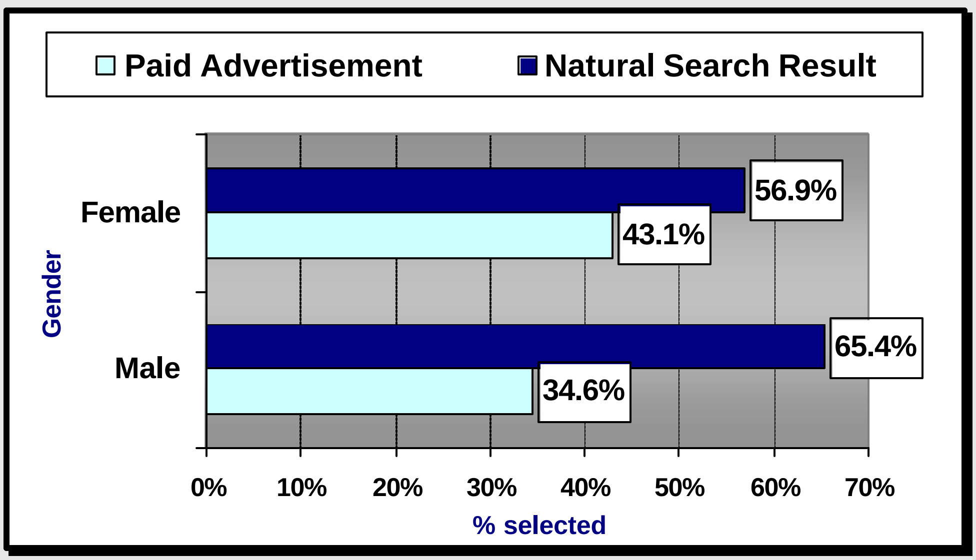
Regardless of the reason, it is clearly equally important for online marketers to ensure that their Web pages are found in both the natural search results and in the paid search advertisements within AOL. Failure to appear in one or the other on this major search engine means missing out on half of the clicks, and half of the traffic, being generated by its users.

Once again, search engine marketing firms offering both natural search engine optimization and paid search advertising management can ensure that their clients' Web pages are consistently found in both the natural search results of AOL and that their clients use both paid inclusion and paid search advertising (a.k.a. pay per click or PPC) programs judiciously – ensuring that investments are only made in keywords that produce a positive ROI.

13. Women find paid search ads more relevant to their searches than men.

Survey respondents were first asked if they use one search engine more often than others. If they answered "yes," they were then asked which one they used most often. If they answered Google, Yahoo!, MSN or AOL, they were shown a sample page of search results from their preferred search engine and were asked to do the following:

"The screen below represents a sample search that was conducted on [name of their preferred search engine] using the keywords 'used cars' by an individual who is thinking about buying a used car. Based on the page of search results that are presented to you here, please indicate which individual search result is most relevant to this query by clicking on one of the search results below. Please remember that only one selection can be made."



Across the 4 largest search properties by market share (Google, Yahoo!, MSN and AOL) 43.1% of female respondents picked a paid search advertisement as the search result they found most relevant to a sample query, while just 34.6% of men selected a paid search ad as most relevant.

These results indicate, despite the fact that women still find natural search results more relevant to their searches (56.9%), that it is more important for websites which predominantly target women – from Avon.com to Linens 'n Things to PotteryBarn.com (sites within the extremely competitive personal care, cosmetics, home fashions, and toys online markets) to participate in paid search advertising than those which are not female-targeted.

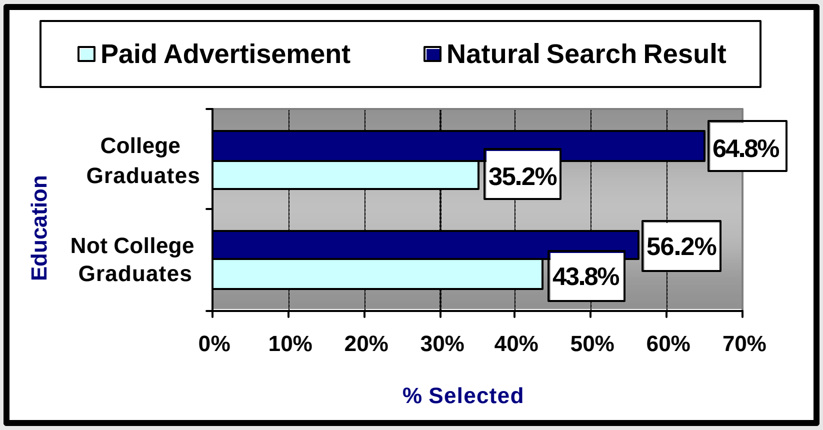
As with many of the previous, and subsequent, results of this survey, this one clearly demonstrates the need for websites to be found in both the natural search results and paid search advertisements sections of all the major search engines – or risk missing out on 40-60% of female searchers/visitors/potential customers.

Due to the extremely competitive nature of many of the online markets that target women (see above), the services of a professional search engine marketing firm will likely be required to both gain top rankings in the natural search results, and to manage the paid search advertising campaign in a way that maximizes the pay-per-click (PPC) spend.

14. College graduates find natural ("organic" or "algorithmic") search results to be more relevant than non-graduates.

Survey respondents were first asked if they use one search engine more often than others. If they answered "yes," they were then asked which one they use most often. If they answered Google, Yahoo!, MSN or AOL, they were shown a sample page of search results from their preferred search engine and were asked to do the following:

"The screen below represents a sample search that was conducted on [name of their preferred search engine] using the keywords 'used cars' by an individual who is thinking about buying a used car. Based on the page of search results that are presented to you here, please indicate which individual search result is most relevant to this query by clicking on one of the search results below. Please remember that only one selection can be made."



64.8% of respondents who were college graduates picked a natural search result as the one they found most relevant to a sample query, while just 56.2% of those who did not graduate college identified a natural search result a most relevant.

Identifying reasons why natural search results were considered more relevant to college graduates than less educated users would be speculative, but that speculation would include the possibility that more educated users are better able to recognize paid search advertisements as such than less educated users. This, coupled with the percentage of Internet users who have a mistrust of advertising in general, would result in a higher percentage of such users clicking on a natural search result – regardless of their feelings about actual relevance of the search result.

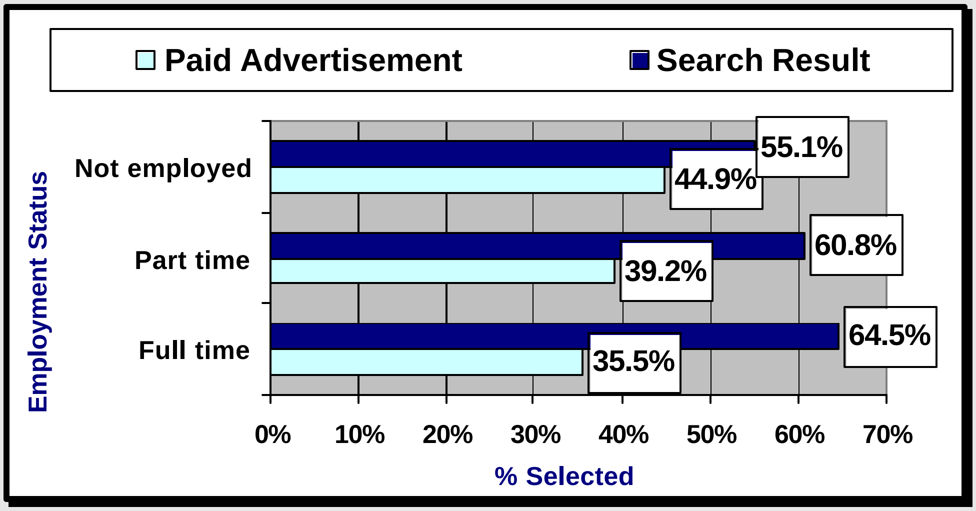
Additional speculation would focus on a possible correlation between being a college graduate and the frequency with which a user accesses the Internet on a daily and weekly basis (see finding #4) as well as the number of years that the user has used the Internet (see finding #5) – though there was insufficient data in the universe of respondents to this survey to draw a definitive conclusion that college graduates used the Internet more frequently and have been using it more years than non-college graduates.

But be it for more educated or less educated users – the need for a website to be found in both the natural search results and paid search advertisements cannot be understated. Failing to be found in either cedes a significant amount of potential website traffic, conversions and business to competing sites whose search engine marketing strategy generated visibility in both.

15. Search engine users who are fully employed find natural ("organic" or "algorithmic") search results to be more relevant than users who are unemployed or employed part-time.

Survey respondents were first asked if they use one search engine more often than others. If they answered "yes," they were then asked which one they use most often. If they answered Google, Yahoo!, MSN or AOL, they were shown a sample page of search results from their preferred search engine and were asked to do the following:

"The screen below represents a sample search that was conducted on [name of their preferred search engine] using the keywords 'used cars' by an individual who is thinking about buying a used car. Based on the page of search results that are presented to you here, please indicate which individual search result is most relevant to this query by clicking on one of the search results below. Please remember that only one selection can be made."



64.5% of respondents who are employed full-time selected a natural search result as the one they found most relevant to a sample query, while 60.8% of users employed part-time found these results most relevant, and just 55.1% of unemployed respondents chose a natural search result.

As with the findings surrounding college graduates, identifying the reasons why fully employed users chose a natural search result as more relevant to the sample query would be speculation. Much of that speculation would focus on a possible correlation between being employed and being a college graduate (see finding #3) – though there was insufficient data in the universe of respondents to this survey to draw a definitive conclusion that there were more fully employed Internet users who were college graduates than fully employed Internet users who were non-college graduates.

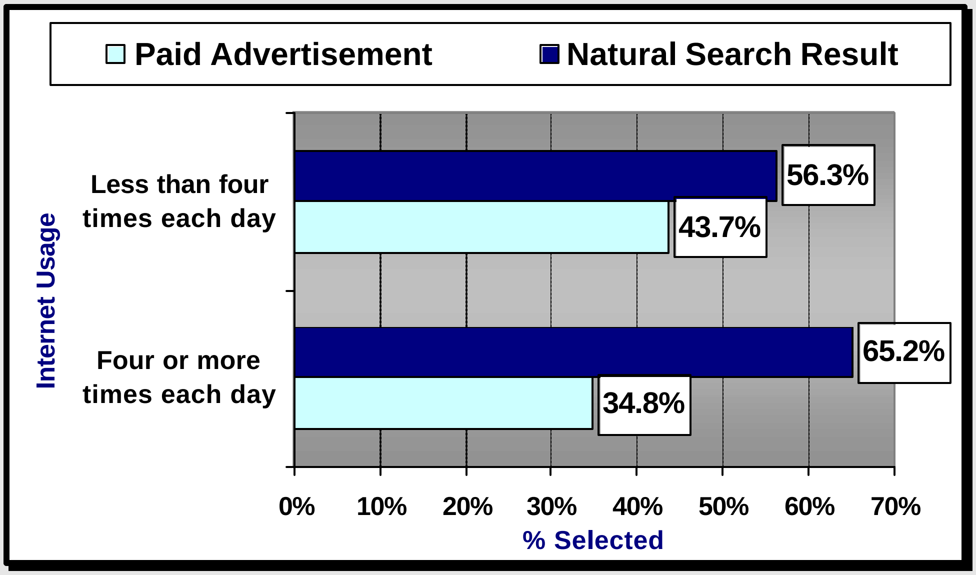
But regardless of the reason, it's clear that Internet users who are either unemployed (44.9%), or who are employed part-time (39.2%), identified paid search advertisements more relevant than Internet users who are employed full time (35.5%). So employment companies whose websites target unemployed or partially-employed individuals, such as: Monster.com, Robert Half International, Manpower.com, Administarff.com, KellyServices.com, etc. – where a higher percentage of visitors are unemployed or underemployed than visitors of most other websites – need to utilize paid search advertising more than other sites on the internet.

Still, the split in perceived relevancy is roughly 60%-40% (natural search results to paid search ads) so failing to have a website appear in both the natural search results and paid search results for a company's targeted keywords cedes a significant percentage of potential website traffic, conversion and business to those competitive sites who do appear in both. And especially in the extremely competitive online employment marketplace, the services of a professional search engine marketing firm is often needed to achieve top results in natural search results, as well as maximize the paid search advertising spend for the highest possible ROI.

16. Frequent users of the Internet find natural ("organic" or "algorithmic") to be more relevant to their searches.

Survey respondents were first asked if they use one search engine more often than others. If they answered "yes," they were then asked which one they use most often. If they answered Google, Yahoo!, MSN or AOL, they were shown a sample page of search results from their preferred search engine and were asked to do the following:

"The screen below represents a sample search that was conducted on [name of their preferred search engine] using the keywords 'used cars' by an individual who is thinking about buying a used car. Based on the page of search results that are presented to you here, please indicate which individual search result is most relevant to this query by clicking on one of the search results below. Please remember that only one selection can be made."



65.2% of respondents who use the Internet 4 or more times a day picked a natural search result as the one they found most relevant to a sample query, while just 56.3% of those who use the Internet less than 4 times per day clicked on a natural search result.

Exploring reasons why frequent users of the Internet clicked on a natural search result as more relevant to a sample query than less frequent Internet users – once again – would be speculation, but that speculation would include possible ties to other demographics reported on in findings #2, #3 and #5. Though there is insufficient data from the universe of respondent to this survey to draw a definitive conclusion, we sense that there is a correlation between frequency of Internet use, education level, employment status and length of time using the Internet.

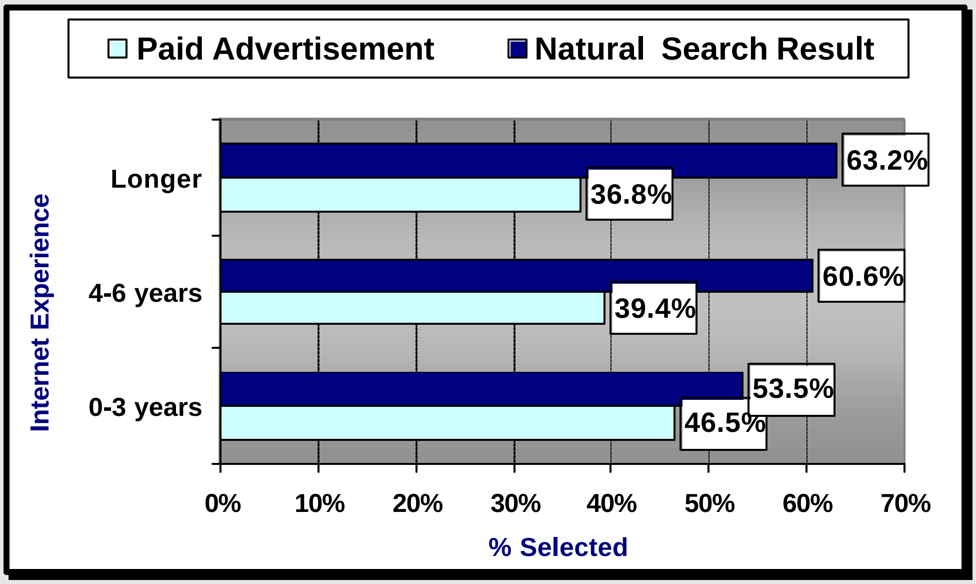
The inference is that combination of these factors leads to a more savvy Internet user – one who may be able to more easily recognize the difference between natural search results and paid search advertisements across all the major search engines. This, coupled with the percentage of Internet users who have a mistrust of advertising in general, would result in a higher percentage of such users clicking on a natural search result – regardless of their feelings about actual relevance of the search result.

But once again – be it for frequent users or infrequent users – the need for a website to be found in both the natural search results and paid search advertisements cannot be understated.

17. Those who have been using the Internet longer find Internet find natural ("organic" or "algorithmic") to be more relevant to their searches.

Survey respondents were first asked if they use one search engine more often than others. If they answered "yes," they were then asked which one they use most often. If they answered Google, Yahoo!, MSN or AOL, they were shown a sample page of search results from their preferred search engine and were asked to do the following:

"The screen below represents a sample search that was conducted on [name of their preferred search engine] using the keywords 'used cars' by an individual who is thinking about buying a used car. Based on the page of search results that are presented to you here, please indicate which individual search result is most relevant to this query by clicking on one of the search results below. Please remember that only one selection can be made."

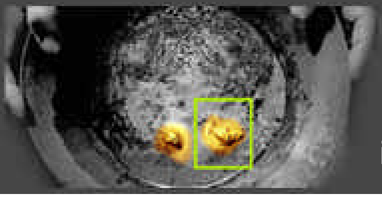


63.2% of respondents who have used the Internet for more than 6 years picked a natural search result as the one they found most relevant to a sample query, with 60.6% of those who have used the internet less 4-6 years clicked on a natural search result, while just 53.5% of users with 0-3 years of Internet experience chose a natural search result.

Yet again, considering reasons why long-time users of the Internet clicked on a natural search result as more relevant to a sample query than less frequent Internet users would be speculation, but that speculation would include possible ties to other demographics reported on in findings #2, #3 and #4. Though there is insufficient data from the universe of respondent to this survey to draw a definitive conclusion, we sense that there is a correlation between frequency of Internet use, education level, employment status and length of time using the Internet.

We believe that the combination of these factors leads to a more savvy Internet user – one who may be able to more easily recognize the difference between natural search results and paid search advertisements across all the major search engines. This, coupled with the percentage of Internet users who have a mistrust of advertising in general, would result in a higher percentage of such users clicking on a natural search result – regardless of their feelings about actual relevance of the search result.

But once again – be it for "seasoned" Internet users or relative "newcomers" – the need for a website to be found in both the natural search results and paid search advertisements cannot be understated.



About iProspect

Founded in 1996, iProspect (www.iprospect.com) is the Original® Search Engine Marketing Firm, helping many of the world's most savvy marketers at many of the world's most successful brands maximize the return on their online marketing investment. iProspect custom creates search engine marketing campaigns for each of its clients based on their needs and marketing goals – selecting the appropriate mix of natural (organic) search engine optimization, paid inclusion management, pay-per-click advertising, web analytics and website conversion enhancement services.

About WebSurveyor

Founded in 1998, WebSurveyor (www.websurveyor) is a leader in do-it-yourself online survey solutions. WebSurveyor's online survey tools, along with educational resources and a dedicated team of advisors, help decision-makers survey their customers, prospects and employees. Thousands of organizations worldwide utilize the powerful WebSurveyor technology to quickly and easily produce actionable results, essential to their ever-changing needs. From start-up to global corporation, organizations have made WebSurveyor a vital part of their decision-making process.

About Stratagem Research

Stratagem Research (www.stratageminc.com) is an independent market research firm that provides quantitative and qualitative research services to firms in the technology industry. Stratagem conducts online surveys, one-on-one interviews and focus groups with all aspects of the technology buying chain, from CIOs through end users. Founded in 1995, Stratagem has conducted research on such topics as data center management issues, applications service level management, systems management and Internet and search engine usage.

About Survey Sampling International LLC

Founded in 1975 Survey Sampling International (SSI) (www.ssisamples.com) is the preeminent supplier of samples to survey research agencies in the USA, Canada, and Europe, offering a wide range of sampling products for reaching various populations by telephone, Internet, and mail. SSI eSamples allow for global targeting by life style, topics of interest, and demographics. SSI's Internet panel of respondents delivers much higher response rates and allows selection of members based on Census demographics.