



iProspect Search Engine User Behavior Study

April 2006



Background

In January 2006, iProspect partnered with Jupiter Research to develop a survey on the behavior of search engine users. A survey was fielded with the intention of better understanding how users behave when presented with search engine results after performing a search. This research resulted in the *iProspect Search Engine User Behavior Study*.

iProspect had asked the same questions in previous end-user surveys, resulting in three prior studies: *Marketing Tactics of Big Brands Not Meeting Web User Expectations* (July, 2002), *Searcher Behavior Shows Top Listings Are Most Important* (November, 2002), *iProspect Search Engine Marketing User Attitudes* (April, 2004). Trending information in this study is derived from these previous studies.

The panels/samples used for each of the studies referenced and compared in this study were different. iProspect believes that an apples-to-apples comparison of results can be made because in each case, the third-party provider of the panel attested to the fact that the panel was representative of the U.S. online population at the time the survey was conducted. It should also be noted that in each case an independent third party compiled and analyzed the results of the surveys prior to providing the results to iProspect.

2006 Methodology

In January 2006, Jupiter Research designed and fielded a survey to online consumers selected randomly from the Ipsos U.S. online consumer panel that resulted in the *iProspect Search Engine User Behavior Study*. A total of 2,369 individuals responded to the survey. Respondents were asked approximately 25 closed-ended questions about their behaviors and preferences regarding online search, online holiday shopping, wireless services, online dating, and pharmaceutical websites. Respondents received an e-mail invitation to participate in the survey with an embedded URL linked to the Web-based survey form. The samples were carefully balanced by a series of demographic and behavioral characteristics to ensure that they were representative of the online population. Demographic weighting variables included age, gender, household income, household education, household type, region, and market size. Additionally, JupiterResearch took the unconventional step of weighting the data by AOL usage, online tenure, and connection speed (broadband versus dial-up) – three key determinants of online behavior.

Balancing quotas are derived from Jupiter Research's Internet Population Model which relies on U.S. Census Bureau data and a rich foundation of primary consumer survey research to determine the size, demographics and ethnographics of the U.S. online population. The survey data is fully applicable to the U.S. online population within a confidence interval of plus or minus three percent.

In this survey effort, JupiterResearch worked with its research partner, Ipsos-Insight, on the technical tasks of survey fielding, sample building, balancing, and data processing. Ipsos-Insight is one of the largest market research companies in the U.S. and maintains a general research panel of 400,000 households. Ipsos-Insight also has access to the Ipsos U.S. Online Panel that is comprised of two million Internet users, and provides JupiterResearch with an easy way to target and survey current online users. Panel-based market research enables researchers to have baseline knowledge of each survey respondent, to increase survey participation rates, and to permit careful rationing of survey fielding to reduce survey burnout.



2004 Methodology

Survey participants were recruited from a panel of nationwide participants from Survey Sampling International's (SSI) SurveySpot, a multi-sourced panel of Internet users in the U.S. who were interested in participating in online research. SurveySpot members came from various sources, including: banner ads, other online recruitment methods, and RDD telephone recruitment. All members were recruited using permission-based techniques. SSI does not use unsolicited email in building the SurveySpot panel.

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

For the *iProspect Search Engine User Attitudes Survey*, a random sampling of 13,555 SSI SurveySpot members was solicited. At the suggestion of the market research professionals at Strategem 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 members to take the survey at a website built using WebSurveyor's online surveying capabilities.

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 market research professionals at Strategem Research. Data was collected by the WebSurveyor online tool and results were analyzed by both iProspect's research department and Strategem Research.

A sample size of 1,649 for a population of 170 million (U.S. Internet users as of 2004) represented a 2.41 margin of error with a 95% confidence level of a 3.18% margin of error with a 99% confidence level.

2002 Methodology

The iProspect studies entitled *Marketing Tactics of Big Brands Not Meeting Web User Expectations* (July, 2002), *Searcher Behavior Shows Top Listings Are Most Important* (November, 2002) are based on the results of an email-based survey hosted by Vote.com, the polling service of former presidential advisor Dick Morris. The 15-day survey ran from April 30 to May 14, 2002. The survey drew 1,403 participants from a panel provided by Vote.com of over 2 million registered Internet users. Not all questions were answered by all participants.



Executive Summary

The iProspect Search Engine User Behavior Study findings should be of significant importance to search engines and search engine marketers, both in terms of the behavior of the search engine user community today, as well as user trends over the last four years.

Findings & Implications

- Key among the findings relating to the current search engine user community is that 62% of search engine users click on a search result within the first page of results, and a full 90% of search engine users click on a result within the first three pages of search results. This reinforces the need for marketers to ensure that their websites are ranked within the first three pages of search results – particularly on the first page – for the keywords used by search engine users to find their products, services, or information.

The importance of appearing high in the search results has actually increased over time. We see a very interesting trend between 2002, 2004, and 2006 data as it relates to this finding. The data indicates that more search engine users are clicking on the first page now (62%) than in 2004 (60%) than in 2002 (48%). Inversely, fewer search engine users are willing to click on results past the third page now (10%) than in 2004 (13%) than in 2002 (19%).

- In a second, related finding, 41% of search engine users who continue their search when not finding what they seek, report changing their search term and/or search engine if they do not find what they are looking for on the first page of search results. A full 88% do so if they do not find what they seek in the first three pages.

When examining the data from 2002, 2004, and 2006 we see that more users are abandoning their query after reviewing the first page now (41%) than in 2002 (28%), with an identical 41% being reported in 2004. Inversely, fewer users are willing to continue their review of results past the third page now (12%) than in 2004 (17%) than in 2002 (22%). Again, the need to obtain top search rankings has increased in importance for search engine marketers.

- In the case where an initial search is unsuccessful, 82% of search engine users will re-launch their search using the same search engine as they used for their initial search, but add more keywords to refine their subsequent search. This finding seems to indicate that a fairly high level of confidence exists on the part of users across search engines in general, as the vast majority seems to trust their search engine of choice to return the correct information more than they trust themselves to enter the appropriate keywords. And though data for this study was not obtained at the individual search engine level, it could be interpreted that, beyond confidence, this finding also demonstrates search engine loyalty.

This finding also points to the need for marketers to not only target a few short, broad terms with their search engine marketing campaigns, but also an abundance of longer, more specific keyword phrases being queried when users are dissatisfied with the results of their initial searches. These often produce more qualified traffic and higher conversion rates. This multitude of ultra-specific



keywords that generate little traffic and few conversions each, but significant numbers of both collectively, is often referred to as “the long tail.”

The trend for this finding leads us to believe that search engine confidence, if not loyalty, has increased over time – with 82% of search engine users saying they would re-launch a revised query on the same search engine as their initial search if their initial search was unsuccessful. This figure was 68% in 2002.

- We believe that brand equity is conveyed upon companies who rank at the top of the search results in the eyes of a percentage of the search engine user population. 36% of search engine users believe that the companies whose websites are returned at the top of the search results are the top companies in that field. Another 39% feel neutral on this question, with only 25% believing that top search engine rankings do not automatically denote an industry leader. This finding is a convincing argument for why traditional “brand” marketers should not only be paying attention to, but also embracing and becoming involved with search, as efforts that result in top search engine rankings can clearly help them achieve their goals.

Despite the contention of some pundits that the search engine end-user community is growing increasingly sophisticated, and increasingly savvy as to how the search engines work, the figure remains flat for users who believe that companies whose Web pages are found at the top of the search results are top companies in their respective fields (35% now, 33% in 2002). Apparently there is still a segment of end-users who think “industry leadership” is a component of what search engines use to rank search results, and both online and traditional marketers can continue to use this perception to their advantage.

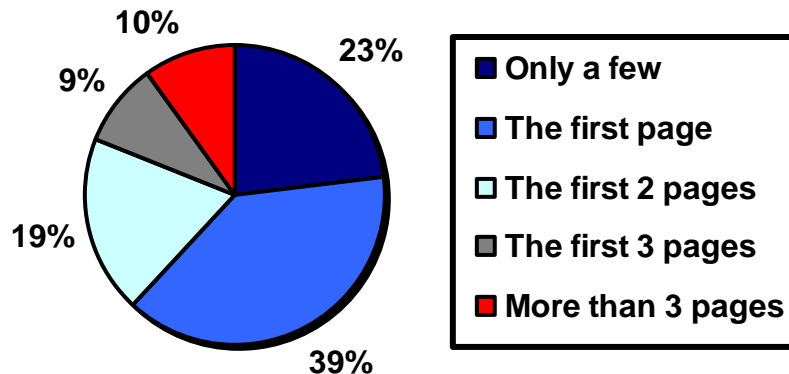


Questions & Responses

This study focuses on the findings generated from the following questions and responses:

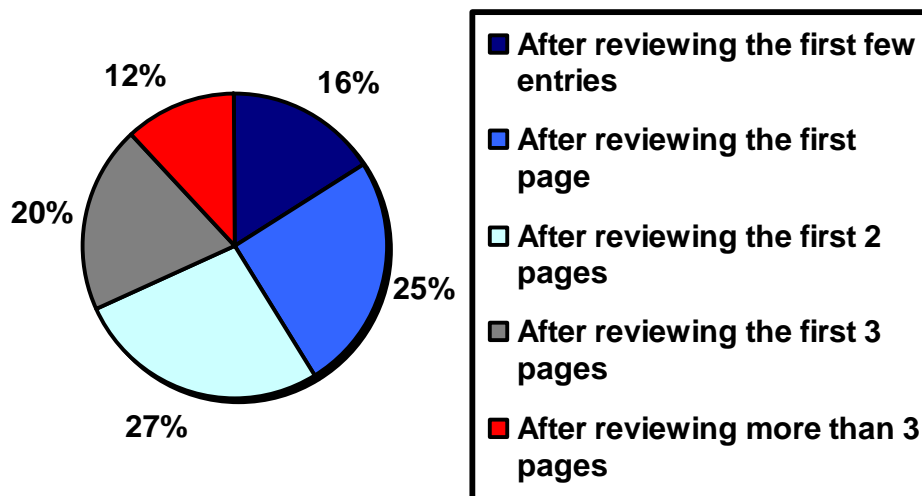
1. When Internet users who use search engines were asked...

“When you perform a search on a search engine and are looking over the results, approximately how many entries do you typically review before clicking one? (Select One)”



2. When search engine users who continue their search when not finding what they are looking for were asked...

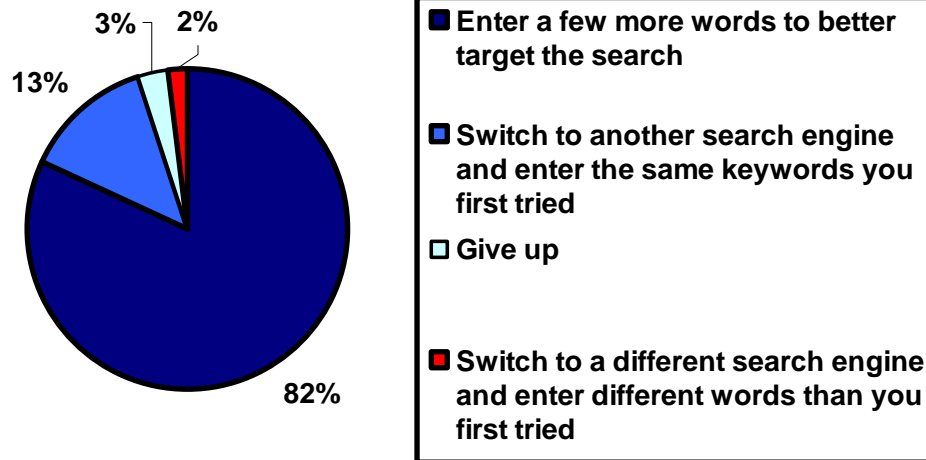
“When you perform a search on a search engine and don’t find what you are looking for, at what point do you typically either revise your search, or move on to another search engine? (Select one)”





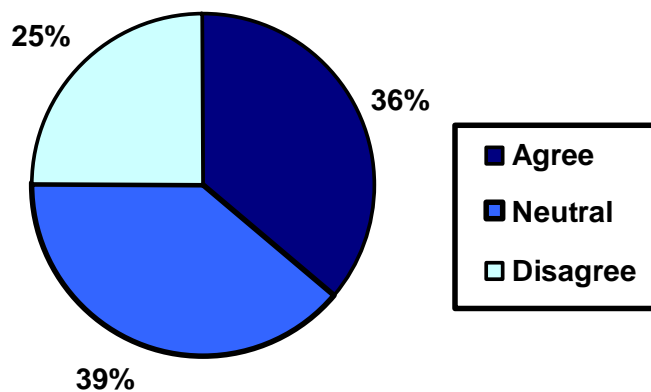
3. When Internet users who use search engines were asked...

“When you perform a search on a search engine and don’t find what you are looking for, what are you typically more likely to do? (Select one)”



4. When Internet users who use search engines were asked...

“Please state how much you agree/disagree with the following statement: ‘Seeing a company listed among the top results on a search engine makes me think that the company is a top one within its field.’ (Select one)”





Trends

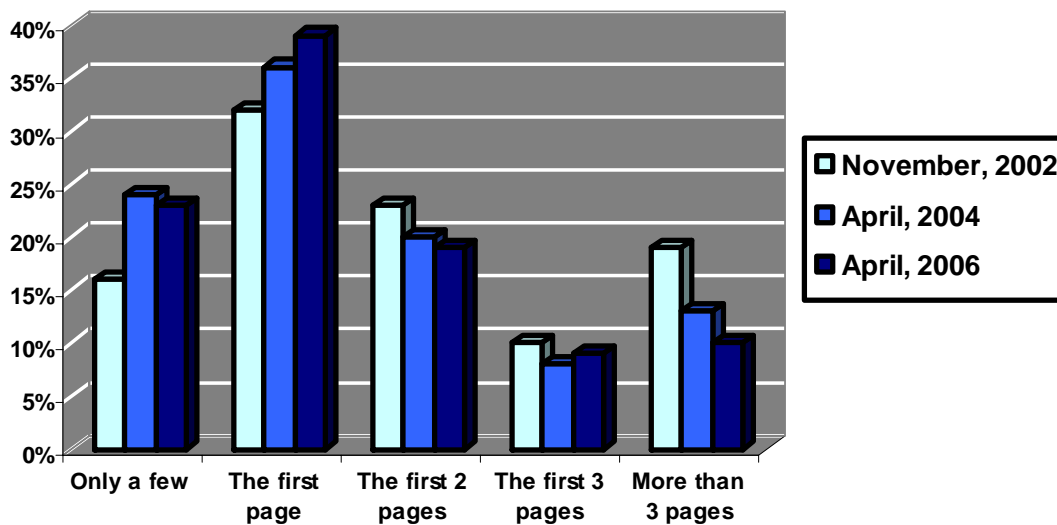
When comparing results from our 2002, 2004 and 2006 studies, we see the following trends for each of these four questions.

1. When Internet users who use search engines were asked...

“When you perform a search on a search engine and are looking over the results, approximately how many entries do you typically review before clicking one? (Select One)”

Response	November, 2002	April, 2004	April, 2006
Only a few	16%	24%	23%
The first page	32%	36%	39%
The first 2 pages	23%	20%	19%
The first 3 pages	10%	8%	9%
More than 3 pages	19%	13%	10%

“When you perform a search on a search engine and are looking over the results, approximately how many entries do you typically review before clicking one? (Select One)”



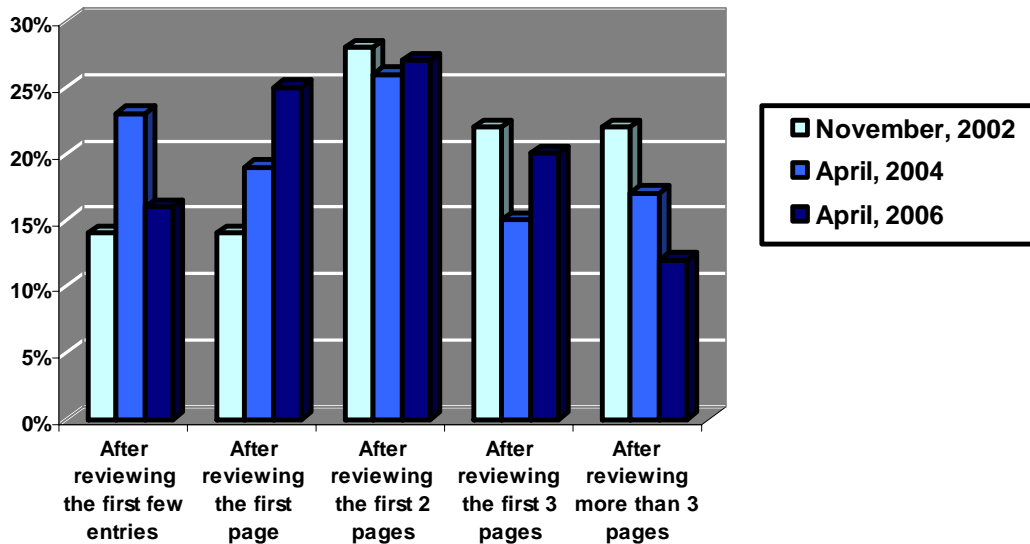


2. When search engine users who continue their search when not finding what they are looking for were asked...

“When you perform a search on a search engine and don’t find what you are looking for, at what point do you typically either revise your search, or move on to another search engine? (Select one)”

Response	November, 2002	April, 2004	April, 2006
After reviewing the first few entries	14%	23%	16%
After reviewing the first page	14%	19%	25%
After reviewing the first 2 pages	28%	26%	27%
After reviewing the first 3 pages	22%	15%	20%
After reviewing more than 3 pages	22%	17%	12%

“When you perform a search on a search engine and don’t find what you are looking for, at what point do you typically either revise your search, or move on to another search engine? (Select one)”



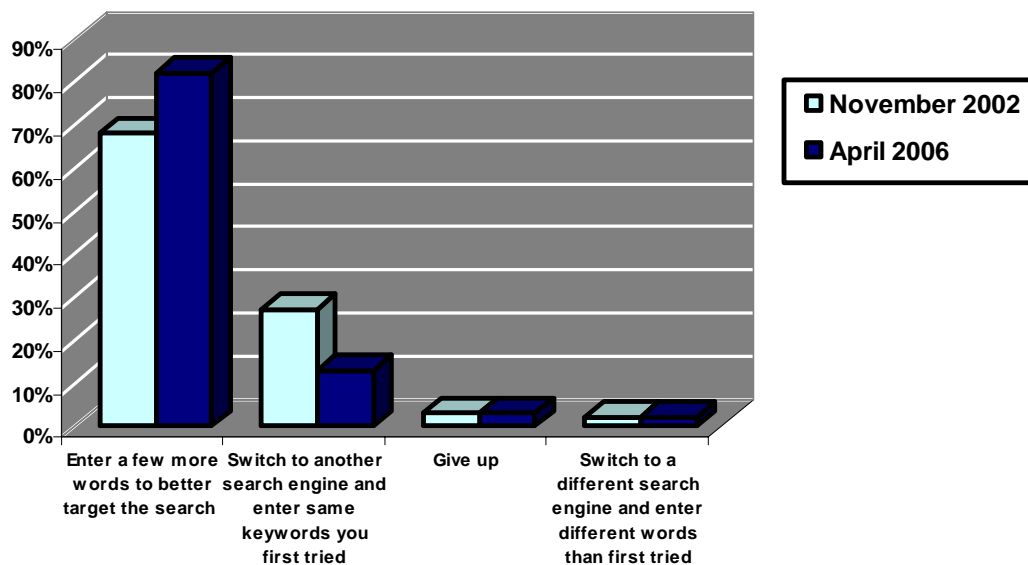


3. When Internet users who use search engines were asked...

“When you perform a search on a search engine and don’t find what you are looking for, what are you typically more likely to do? (Select one)”

Response	Nov. '02	April '06
Enter a few more words to better target the search	68%	82%
Switch to another search engine and enter same keywords you first tried	27%	13%
Give up	3%	3%
Switch to a different search engine and enter different words than first tried	2%	2%

“When you perform a search on a search engine and don’t find what you are looking for, what are you typically more likely to do? (Select one)”



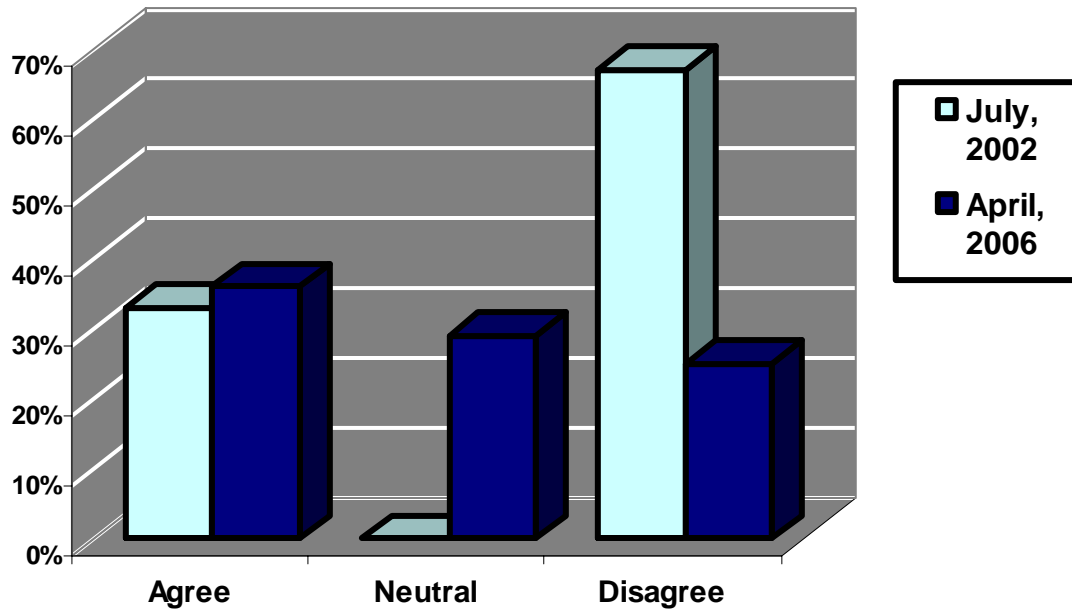


4. When Internet users who use search engines were asked...

“Please state how much you agree/disagree with the following statement: “Seeing a company listed among the top results on a search engine makes me think that the company is a top one within its field. (Select one)”

Response	July, 2002	April, 2006
Agree	33%	36%
Neutral	N/A	39%
Disagree	67%	25%

“Please state how much you agree/disagree with the following statement: ‘Seeing a company listed among the top results on a search engine makes me think that the company is a top one within its field.’ (Select one)”





Key Findings

- 1. It's vital for search engine marketers to ensure that their websites are found on the first page of search results, or at a minimum within the first three pages of search results, in order to be found by search engine users. Only 10% click on results beyond the third page.**

62% of search engine users click on results within the first page of search results and 41% of those who continue search when not finding what they are looking for change their search term and/or search engine after reviewing the results on the first page of search results. A full 90% of users click on results within the first three pages, and 88% change search term and/or search engine within the first three pages of results. The trend over the last four years is toward more users clicking on results on the first through third pages, and less users clicking on results contained on pages beyond the third page. Top search engine rankings are increasing in their importance to marketers.

- 2. Search engine user confidence has increased over the last four years, as has the use of longer keyword searches.**

82% of search engine users report that they re-launch an unsuccessful query using the same search engine, but using more keywords. This same figure was just 68% in 2002. This means that marketers need to expand their keyword targeting by thoroughly examining their log file data, and (within paid search campaigns in particular) through the use of Google's "broad match" and Yahoo!'s "advanced match" functionality in order to be found on these "long tail" search terms. "Negative match" or "exclusions" functionality should be prudently used to filter out unqualified responses generated through the use of broad matching

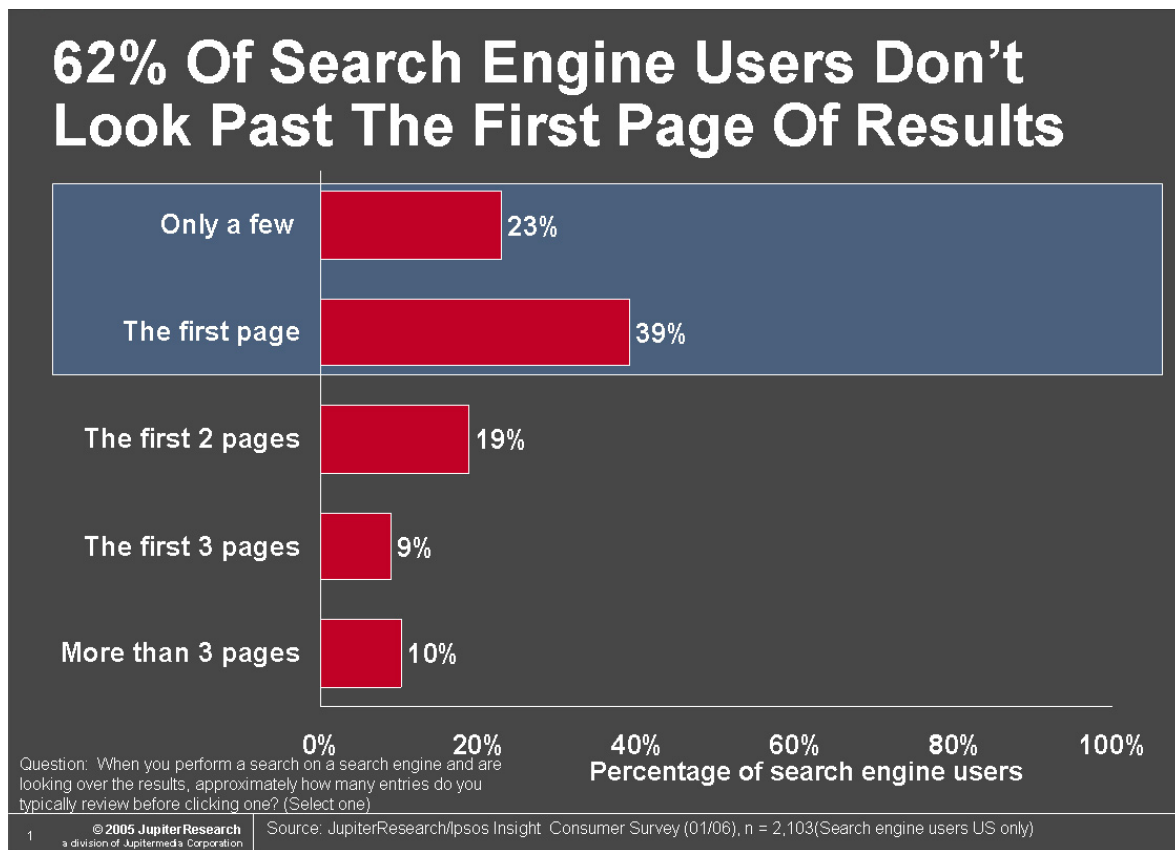
- 3. Search engine results continue to impart brand equity on those companies that appear at the top of search results.**

36% of search engine users report that they believe that companies whose websites appear at the top of the search results are leaders in their field. This belief has increased slightly over the last four years (33% in 2002). Surprisingly 40% of users 25-44 years old associate top search results to company prominence. Traditional and "brand" marketers need to become involved in the initiatives that their colleagues on the search engine marketing side are undertaking, as those efforts are apparently helping to achieve branding goals.



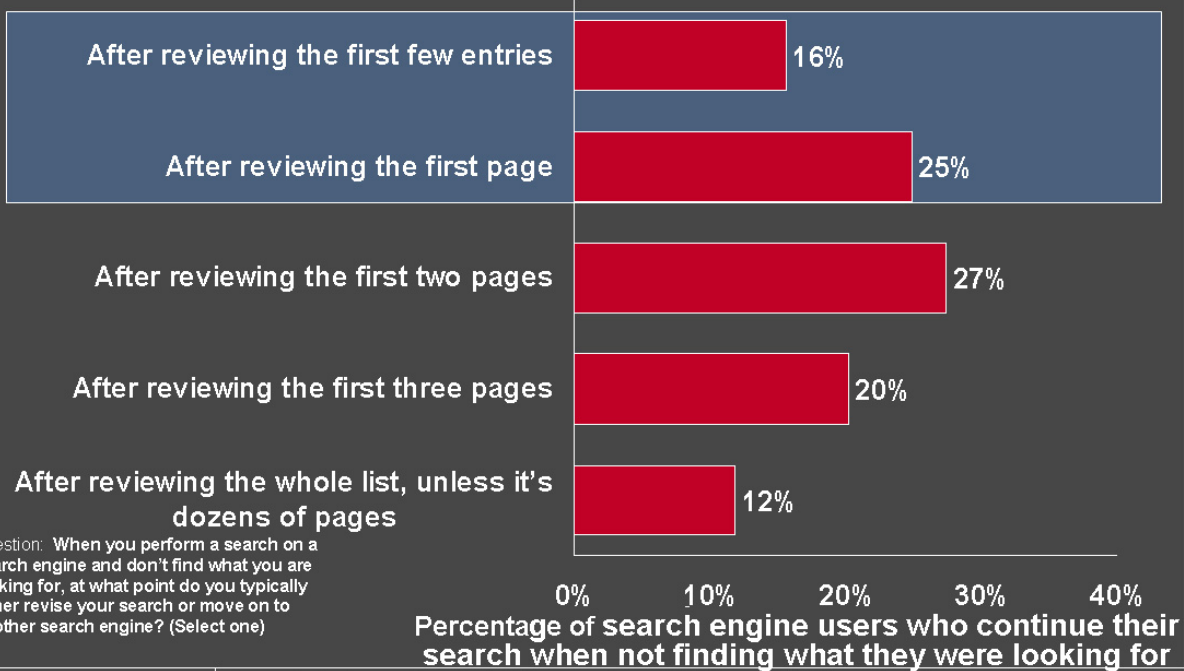
Detailed Findings

1. It's vital for search engine marketers to ensure that their websites are found on the first page of search results, or at a minimum within the first three pages of search results, in order to be found by search engine users. Only 10% click on results beyond the third page.





41% Of Respondents Switch Query And/Or Search Engine After 1st Page



2

© 2005 JupiterResearch
a division of Jupitermedia Corporation

Source: JupiterResearch/ipsos Insight Consumer Survey (01/06), n = 2,036 (US search engine users who continue their search when not finding what they were looking for only)

For 10 years iProspect has preached the need for websites to be found within the first three pages of search results – at a minimum – on any given search engine in order to be found by Internet users seeking products, services, or information. In fact, we long ago established the practice of tracking and reporting only top 30 rankings attained by our clients (those within the first three pages of results), often using the analogy that a website found beyond page three was no more than a “billboard in the woods.” Certainly the findings of this study continue to validate our long-time position – with only 1 out of 10 search engine users willing to look beyond the first three pages for their desired result.

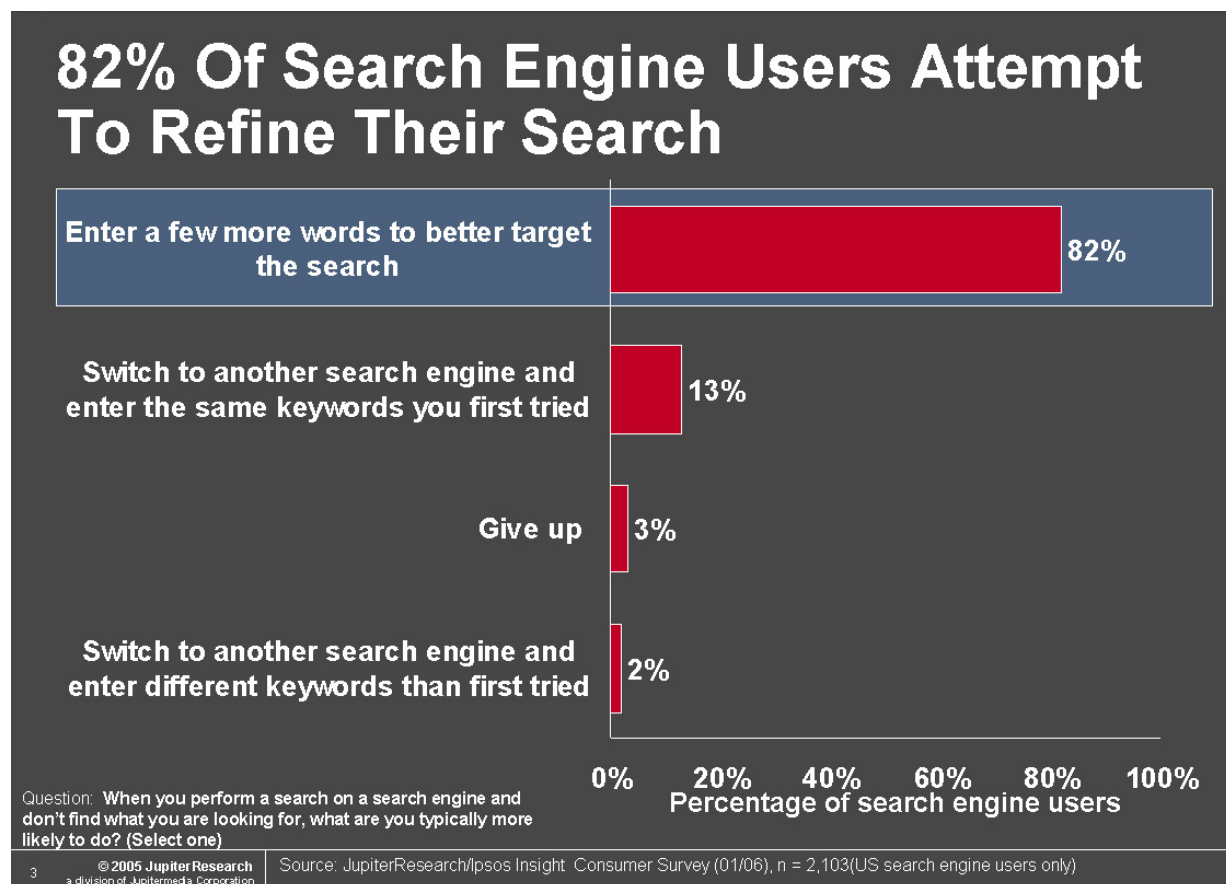
But the findings of this study do more than validate the “first three pages rule” – they actually amplify it. In fact, this study has uncovered the trend that fewer users now, as opposed to two years ago and four years ago, are journeying past the third page of search results before either clicking on a result, or abandoning their review of results and launching a new search. Focusing on the first page in particular, over the past four years the percentage of users who click on either the first few results, or results on page one, has shot up from 48% to 62%.



Possible reasons behind this trend are pure conjecture, but include the slow but steady improvement in search engine algorithms' ability to satisfy users with results that are highly relevant to their searches. Then there is the complementary, which-came-first-the-chicken-or-the-egg factor of the burgeoning search engine marketing industry, which has lead to a much higher percentage of websites (the leading ones in most online marketplaces) being professionally optimized in 2006 than in 2002.

Finally, there's simply the human factor – more experienced search engine users using search engines more effectively, and the higher expectations that they develop when they grow accustomed to the search engines' efficacy. When a search doesn't immediately deliver with the efficiency or relevancy that users have grown accustomed to, they may be abandoning it faster now than they did a few short years ago.

2. Search engine user confidence has increased over the last four years, as has the use of longer keyword searches.





In April 2004 iProspect released the Search Engine User Attitudes Study in which we asked users about the frequency of their use of one search engine over another. From that study, we concluded that at that time there was, in fact, a degree of search engine loyalty among the Internet user population, and that different search engines were the beneficiaries of varying degrees of user loyalty.

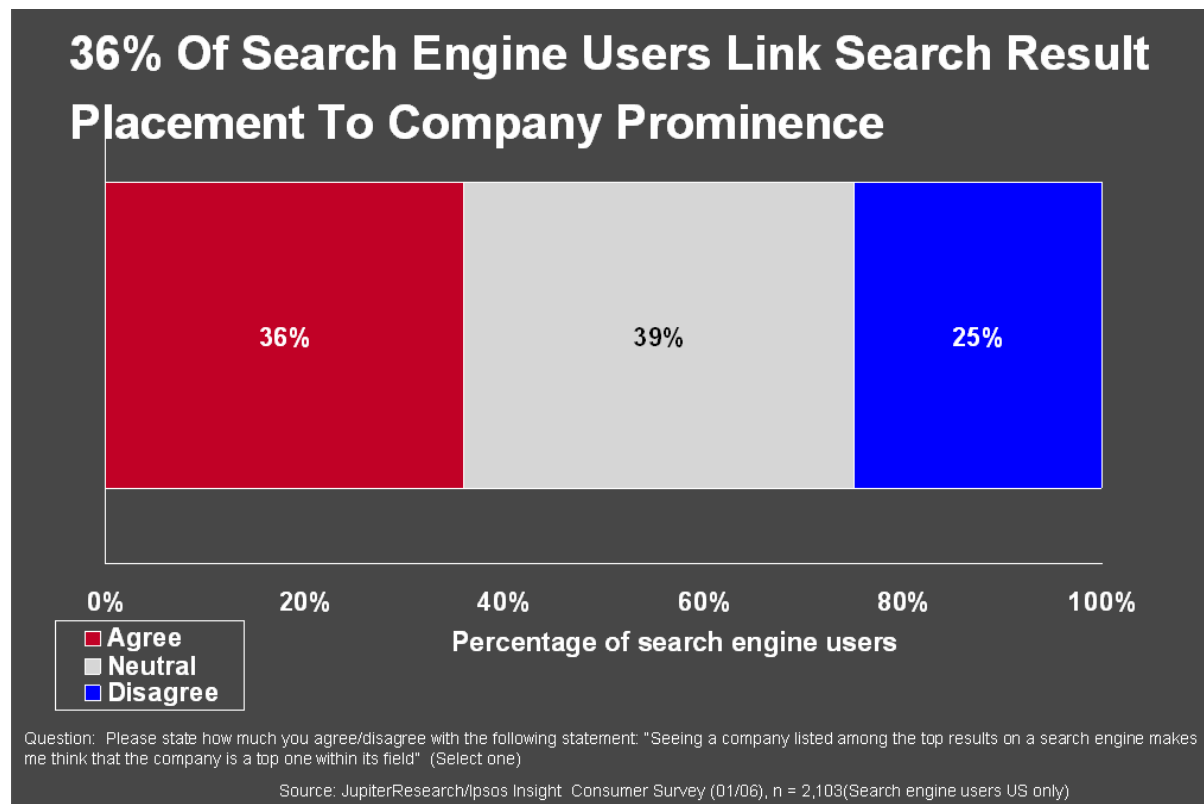
In this 2006 study, a different set of findings, based on different questions about user behavior, has lead us to at least confirm that search engine confidence – if not out-and-out loyalty – exists. A full 82% of search engine users claim that when they launch a search that does not yield their desired result, they re-launch a modified version of the original search using the same search engine as they used for their initial search.

Furthermore, this confidence/loyalty clearly appears to be growing, for when this same question was asked in 2002, the percentage that stuck with the same search engine was just 68%.

The implication for marketers is that because of the search engine users' increasing preference to re-launch unsuccessful initial searches as longer keyword searches, they need to better target these longer keyword phrases to be found by searchers. One important tactic that may help accomplish this in Google is to utilize the "broad match" functionality within their paid search campaigns in order to be found on some of the longer searches. These "long tail" keyword phrases are too numerous and unpredictable to include exhaustively, but Google's broad matching tool is useful in helping to be found on these longer terms. Similar functionality exists in Yahoo! in the form of "advanced match" but there is a pricing benefit to knowing and including the longer queries in your keyword set. Therefore, marketers should make good use of their log file data to identify the actual keyword phrases utilized by search engine users and include them in their Yahoo! keyword sets. In both engines, marketers should take care to filter out unqualified broad match traffic through the use of "negative matching" or "exclusions."



3. Search engine results continue to impart brand equity on those companies that appear at the top of search results.



In 2002 when users were asked if they believed that companies whose websites were found at the top of the search results were the leading companies in their respective fields, 33% responded that they believed that to be the case. Four years later, a slightly higher percentage (36%) still believes this to be true.

Even though approximately two-thirds of U.S. Internet users are either neutral, or do not believe this to be true, brand marketers and search engine marketers should be heartened that one-third of users still believe that top of search results equals top of field. So for this segment of the user population, top search rankings impart brand equity and create the perception of industry leadership. Brand marketers would be well advised to not only pay attention to, but also become involved in, the efforts of their search engine marketing colleagues, as it is clear that these efforts produce positive branding results.

Why has this figure remained flat over the last four years? We speculate that despite the growing number of "veteran" search engine users who are becoming more sophisticated and savvy about how search engines operate, the percentage of these users within the overall Internet user population has remained consistent due to the overall growth of the U.S. Internet user population over the last four years. As the percentage of total U.S. households with a computer reaches a saturation point within the next couple of years, it will be interesting to see if this belief changes as a higher percentage of the user population becomes more experienced with, and knowledgeable of, the use of search engines.