Search Engine Usage In North America

A Research Initiative by ENQUIRO

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Objectives

The research objective was to gather general search engine usage information from a broadly representative sample of North American internet users.

Summary of Observations and Conclusions

The results of the survey provided an interesting glimpse into search engine usage patterns. Many of the findings complement what was discovered in the focus group research and published in the white paper "Inside the Mind of the Searcher" (available for download at www.enquiro.com/research.asp). We strongly recommend reading that paper before this one, as it is referenced often. A total of 425 participants responded to the survey.

Total Sample Findings

Generally, we found high levels of satisfaction and loyalty amongst most users, especially among users of Google. Google dominated as the favorite engine, with over 70% of participants indicating that it was their favorite engine.

However, when we looked at the way people used engines, it's clear that despite their widespread usage, we're still learning much about search engines and their potential. Most search queries are very simple and generic in nature. Few people take advantage of extended Boolean search capabilities or other advanced search features. The majority of us type in a few top of mind words and hit the search button without giving a lot of thought about how to construct our search query. We tend to take an iterative approach to searching, refining our search based on the results that are returned to us. The search results page acts as a point of departure that we return to frequently in the search process. This behavior was clearly seen amongst the participants in our focus group, and seemed to be confirmed by the responses of people to the survey.

We also found that people are much more likely to use a search engine during the research or consideration phase of the buying cycle. Over 60% of participants indicated they would do this, compared to only 20% that would use a search engine to find a site to make a purchase online. As we discussed in the focus group white paper "Inside the Mind of the Searcher", this tendency will cause many search engine marketers to rethink their campaign strategies.

We found that there is still a significant amount of confusion over sponsored links. This is particularly noticeable among non Google users. In total, over 30% of the participants couldn't properly identify the sponsored links on a page. But if we split that out by Google and non Google users, we find that about 27% of Google users are confused about what is sponsored on the page, compared to over 43% of non Google users.

When participants were asked to choose a link during a product research search, they were overwhelming drawn by links that appeared to offer sources of trusted, unbiased information. They were also drawn to the organic links more than the sponsored links, with over 77% choosing one of the organic listings. We expected the sponsored links to be more popular when participants were presented with an actual purchase scenario, and this was indeed the case, but not to the extent we anticipated. Given this situation, 67% of the participants still chose an organic link. We have heard anecdotally that search engines have found similar organic percentages in their own monitoring (the figure 70% organic click through has been widely mentioned) but we were unable to find any published numbers on this. We did find that these numbers tend to coincide with findings from the focus group.

Variations by Category

When looking at cross tabulated results, some interesting variances were identified.

Men seemed a little more drawn to Google and were a little more likely to be more specific when searching. We have seen that women tend to be more deliberate when they search, whereas men want to get the search over with and get to the site they were looking for. That said, there was a remarkable similarity between the links chosen by men and women.

Perhaps the most interesting variations were identified between Google and non Google users. Google users were much more loyal and more likely to find what they were looking for with fewer searches. They tended to be more specific in their queries and more drawn to trusted, unbiased sources of information. They were also much more likely to choose an organic link than the users of other engines, with only 14.8% of Google users choosing a sponsored link, as compared to 41.8% of non Google users. Google users also had the lowest level of confusion about what was a sponsored link on the search results page.

Income and education had impact on search patterns as well. We found that higher income and education levels tended to translate into more participants clicking on links that provided trusted/unbiased information, while recognized brands had more impact with the lower income groups. We also found that higher education generally leads to more advanced search queries, especially geared towards finding unbiased product information in the purchase research phase. Generally, the higher the income and education levels, the more comfortable the participants were with purchasing online.

The profile of usage when broken down by age showed almost a bell curve of experience, with the highest proficiency and comfort levels in the middle age groups, with drop offs at both extremes (youngest and oldest).

In drawing general conclusions when looking at the results, there are some that seem to be well supported by the numbers. Google has been tremendously successful in creating an ideal user profile. Statistically speaking, Google users are the highest paid, most internet savvy and best educated people to be found online today. They love Google, and use it almost exclusively. However, because of their discerning nature, they are a tough sell when it comes to sponsored listings. They love Google because of the quality of the organic results, and while they are not resistant to sponsored listings (at least no more so than the users of other engines) they appear to go first to the organic ones.

When strategizing to use search, marketers have to understand that their target market is most likely to use search to do product research, and when doing so, they are looking for objective information, not sales pitches. A listing that is well placed in organic listings and looks to offer trusted, unbiased information from a recognized source (i.e. Consumer Reports) will do extremely well in drawing click throughs given this research type scenario, with the potential to draw over half the clicks on the page.

The importance of a balanced approach to search marketing, using both sponsored and organic strategies, was also indicated. Obviously, unless a company is willing to forfeit either 70% (in the case of organic) or 30% (in the case of sponsored) of their potential market to the competition, they have to seriously consider both search channels.

Finally, while trends certainly emerged in our research, it’s important to understand that just like most human activities, the use of a search engine and the response to the presented listings is a highly individual action. People search differently. They react differently to websites. One cannot hope to apply a “one size fits all” strategy and be successful. Yet, that is what is common with most search marketers today. We strongly encourage search marketers to gain a thorough understanding of their customer and how they are likely to use and interact with a search engine.

Methodology

Although the findings from the focus group research we conducted were published previously, this research actually predated the focus group. Several things were identified in the focus group that we would like to research further, but because of timing we were unable to do so in this project.

Links to the survey (available at jan04.enquiroresearch.com) was sent out to a list of people including randomly chosen emails available from a mail list provider as well as participants from our internal mailing list. These mailings occurred in late December, 2003 and throughout January and early February in 2004. In total, 425 people responded to the survey, giving an approximate confidence level of 19 times out of 20, +/-5%.

In the survey, we asked participants a number of general information questions, as well as presented search scenarios simulating both a product research situation and an actual purchase situation. We mocked up simulated results pages that would have the actual look and feel of the engines they were familiar with. We also ensured that there was an even distribution of different types of listings in both the organic and sponsored listings. (Note: The layout of some search engine results pages, notably Yahoo, have changed since the survey was conducted)

At any point in the survey, respondents were able to decline to answer a question, meaning that not all respondents answered all questions. For example, if a respondent said they would not purchase a wireless phone online (the actual purchase scenario) they would have automatically been forwarded past this entire section of the survey.

Results were gathered in an SQL database and were exported to Excel, and were then brought into SPSS for analysis. As well as tabulating overall results for each of the questions, we also did cross tabulation analysis based on education level, gender, income, favored search engine (Google vs non Google users) and age. We have published the results from each of these in this paper.

Survey Results

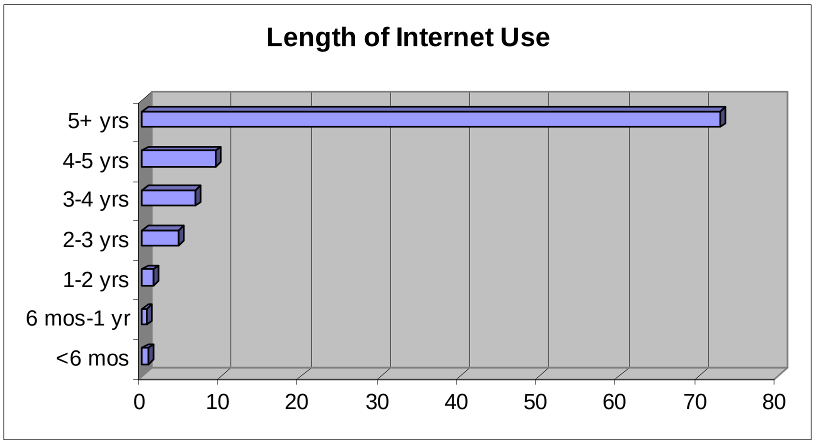
(Note: Question 1 was a qualifying question to see if the respondent was an Enquiro client. Because of various reasons, results from questions 19, 23, 24 and 29 were flawed to some extent and so haven't been included in this analysis)

Question 2:

How long have you been an Internet User?

Overall, the users sampled in the survey had a large amount of experience using the internet, with 72% of them having more than 5 years experience.

Experience	Percentage
<6 mos	0.72
6 mos-1 yr	0.48
1-2 yrs	1.44
2-3 yrs	4.57
3-4 yrs	6.74
4-5 yrs	9.39
5+ yrs	74.21



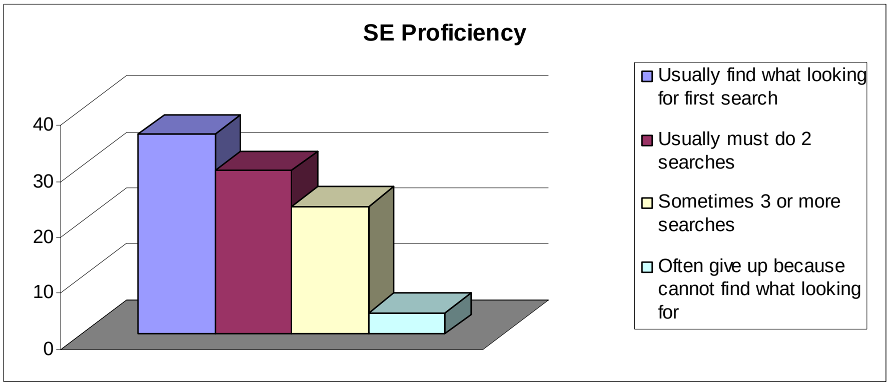
Question 3:

Regarding search engines, which of the following statements is most applicable to you?

1. I usually find what I'm looking for on the first search
2. I usually have to do 2 searches
3. I have to do 3 or more searches
4. I often give up because I cannot find what I'm looking for

Statement	Percentage
Usually find what looking for first search	37.90
Usually must do 2 searches	30.92
Sometimes 3 or more searches	24.18
Often give up because cannot find what looking for	3.99

The great news for the search engine industry is that search actually works. Most people do eventually find what they are looking for using search engines, with less than 4% of all users 'giving up' because they can't find what they want.



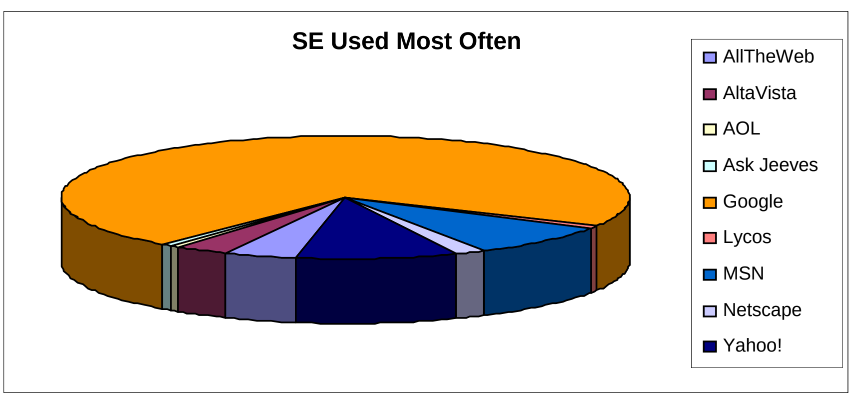
Question 5:

What search engine do you use most often?

1. AllTheWeb
2. AltaVista
3. AOL
4. Ask Jeeves
5. Google
6. Lycos
7. MSN
8. Netscape
9. Yahoo!

Search Engine	Valid Percentage
AllTheWeb	4.15
AltaVista	3.11
AOL	0.51
Ask Jeeves	0.51
Google	71.68
Lycos	0.51
MSN	8.57
Netscape	1.81
Yahoo!	9.09

Google was the clear winner when participants were asked to indicate their favorite engine. This does not indicate actual search engine usage, such as is measured by Nielsen or MediaMetrix. Possible reasons for variations from these numbers are explained in the whitepaper “Inside the Mind of the Searcher”.

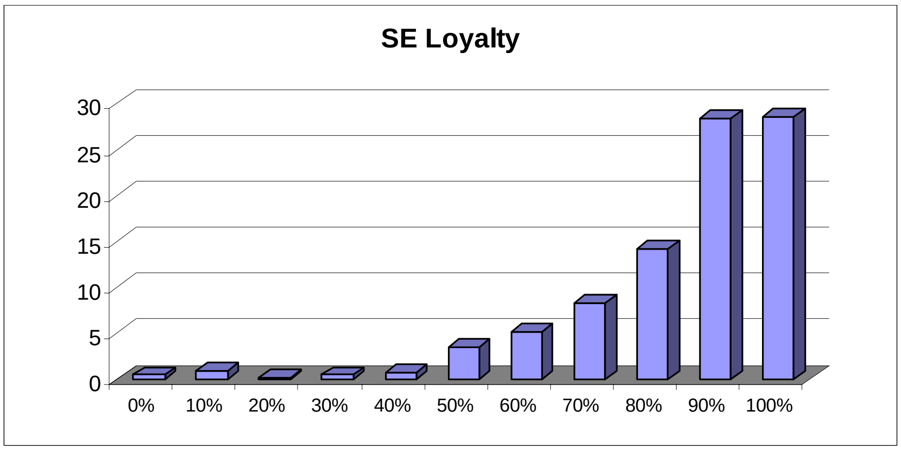


Question 6:

Approximately what percentage of searches do you use the search engine chosen from the previous question for?

Percentage of Use	Percentage of Users
0%	0.50
10%	1.01
20%	0.25
30%	0.50
40%	0.75
50%	3.78
60%	5.55
70%	8.83
80%	15.15
90%	30.30
100%	30.55

It's clear that once a favorite engine has been found, it is used for the majority of searches, with over 70% of participants using this engine for 80% or more of their searches. This confirms the importance of brand recognition with search engines, with Google being the clear winner.



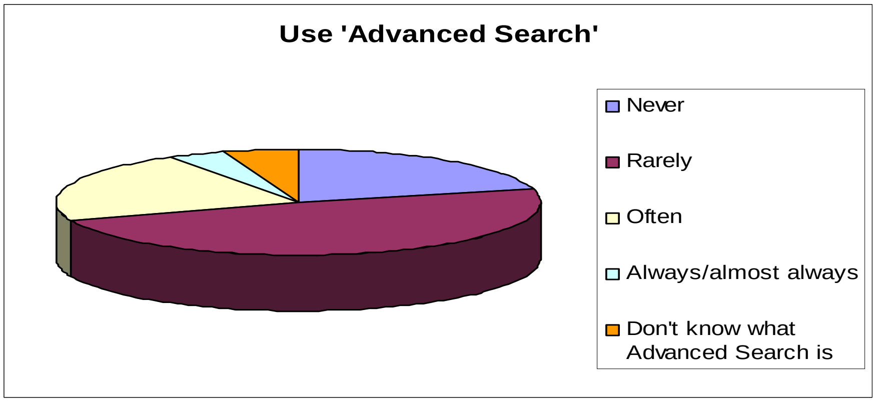
Question 7:

How often do you use the 'Advanced Search' feature on a search engine?

1. Never
2. Rarely
3. Often
4. Always/almost always
5. Don't know what Advanced Search is

Response	Percentage
Never	20.56
Rarely	47.20
Often	21.06
Always/almost always	3.80
Don't know what Advanced Search is	4.82

Over ¼ (26%) of all search engine users either don't know about or don't use advanced search engine features. An additional 48% rarely use advanced search features. The leaves only ¼ of all users actually using the advanced features of search engines on a regular basis.

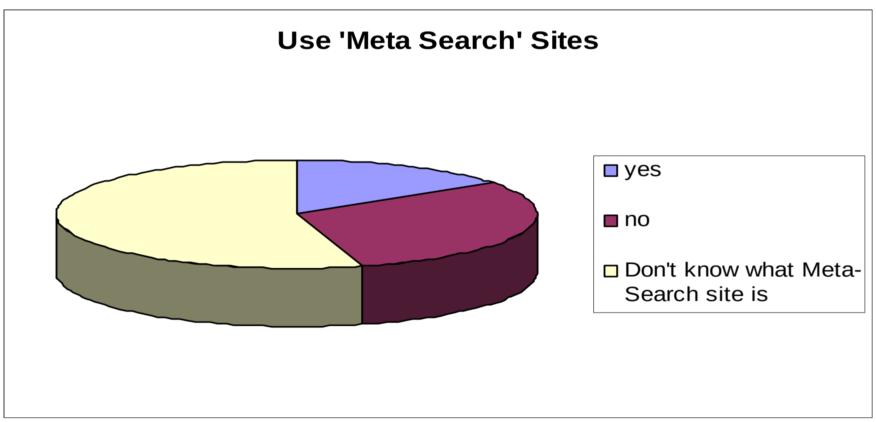


Question 8:

Do you ever use meta-search websites?
1. Yes
2. No
3. Don't know what Meta-Search site is

Response	Percentage
Yes	14.83
No	29.41
Don't know what Meta-Search site is	52.94

Again, the majority of users either don't know what a Meta Search site is, or don't use them regularly.



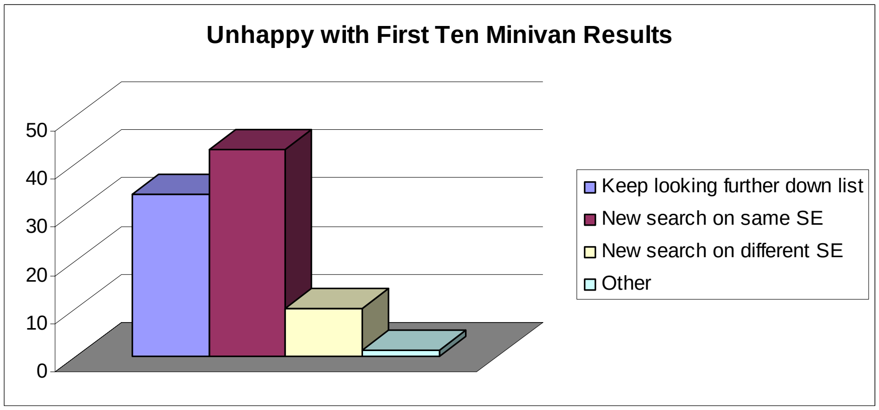
Question 9:

If you searched for information about minivan safety ratings and you were not happy with the first ten listings on the search results page, what would you do?

1. Keep looking further down list
2. New search on same search engine
3. New search on different search engine
4. Other

Response	Percentage
Keep looking further down list	37.40
New search on same SE	47.53
New search on different SE	11.16
Other	1.55

37.4% of users indicated that that if there were no relevant results in the top 10 they would go to the second page of results. This indicates that over 60% of users don't bother going to the second page, assuming that if it's not on the first page, it's not relevant. This indicates the importance of first page visibility. It should be noted that this question was based on the assumption that there were no relevant results in the top listings, a relatively infrequent occurrence. This drops the percentage of second page visitors even lower.



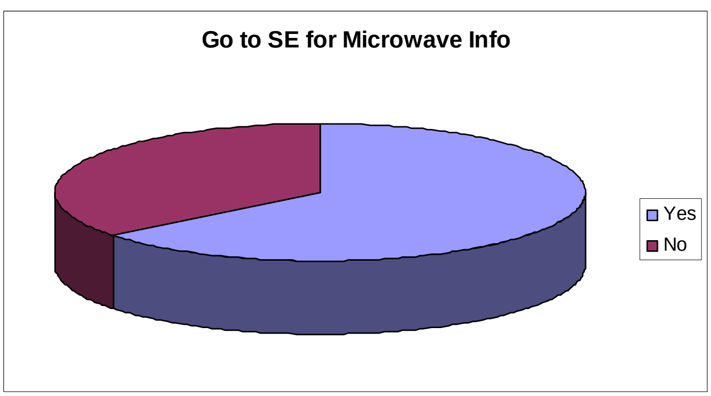
Question 10:

If you were considering purchasing a new microwave, would you go to a search engine to begin researching the purchase?

Response	Percentage
Yes	62.82
No	35.07

1. Yes
2. No

About 63% of respondents indicated that in the scenario given, they would use a search engine to begin researching a purchase online. When you compare to the percentage of respondents in Question 25 who indicated they would purchase a wireless phone online (slightly over 20%) there was a significant drop off in the numbers of consumers likely to use a search engine as you move from the research phase of the buying cycle to the purchase phase.



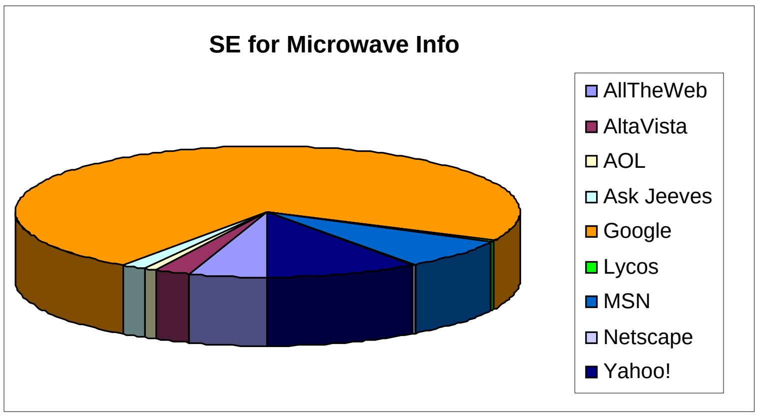
Question 11:

What search engine would you use to get product information on microwaves?

1. All The Web
2. AltaVista
3. AOL
4. Ask Jeeves
5. Google
6. Lycos
7. MSN
8. Netscape
9. Yahoo!

Search Engine	Percentage
AllTheWeb	4.87
AltaVista	2.03
AOL	0.81
Ask Jeeves	1.62
Google	69.91
Lycos	0.40
MSN	6.91
Netscape	0.40
Yahoo!	9.34

This indicates the search engine that would be used in the scenario given.



Question 12:

Assume you did go to a search engine, what exactly would you type in the search box to get information about microwaves?

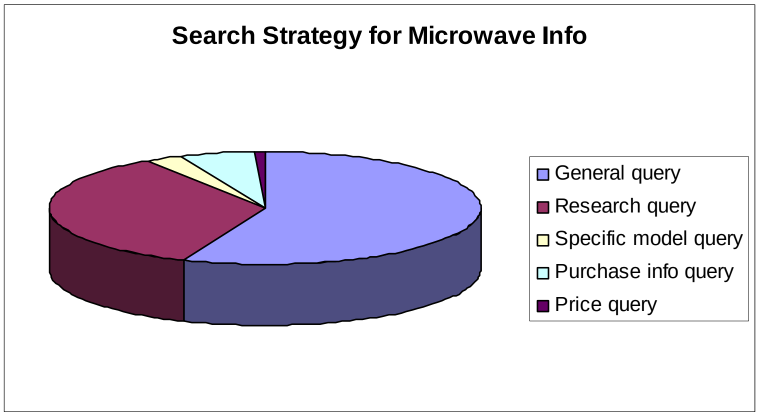
1. General query
2. Research query
3. Specific model query
4. Purchase info query
5. Price query

Response	Percentage
General query	56.03
Research query	34.91
Specific model query	2.58
Purchase info query	5.60
Price query	0.86

We classified the actual search queries given by participants into 5 categories. Here are examples of each:

General Query	Microwaves, Microwave ovens
Research Query	Microwave oven reviews, Microwave oven features
Specific Model Query	Panasonic microwaves, Admiral microwave ovens
Purchase Info Query	Where to buy a microwave oven
Price Query	Best prices on microwave ovens

We found that the majority of users (over 56%) tend to start their search with a broad generic phrase, no matter what the intent of their search was1. Given a research specific scenario, there was a significant percentage of participants (almost 35%) who would have modified their query to include a research based word.



Response	Percentage
SP1	12.00
SP2	2.22
SP3	8.89
OR1	18.67
OR2	9.78
OR3	47.56
OR4	0.89

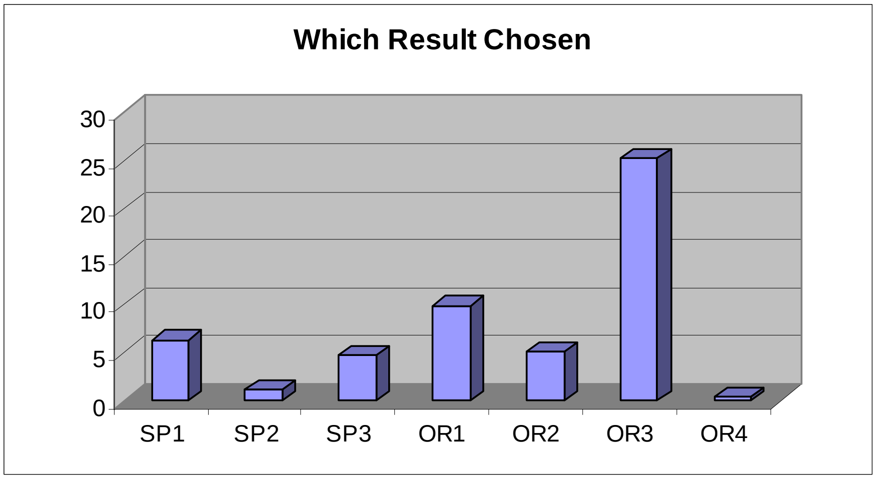
Question 13:

Which results would you click first?

Results were shown that fell into 8 different categories. These were:

SP1	Sponsored – Generic Buying Sites (offered prices, multiple brand selection, ecommerce)
SP2	Sponsored – Trusted Brand or Vendor sites (offered information and ability to purchase along with trusted names in description)
SP3	Sponsored – Consumer Research sites (sites like Consumer Reports that offer unbiased product reviews)
SP4	Sponsored – Information Sites (sites with general information about the product)
OR1	Organic – Generic Buying Sites (offered prices, multiple brand selection, ecommerce)
OR2	Organic – Trusted Brand or Vendor sites (offered information and ability to purchase along with trusted names is description)
OR3	Organic – Consumer Research sites (sites like Consumer Reports that offer unbiased product reviews)
OR4	Organic – Information Site (sites with general information about the product)

As can be seen, the organic listing that offered unbiased product information (OR3) was clearly the most popular choice amongst participants. Generally speaking, organic listings were more popular than sponsored listings, with fewer than 24% of participants choosing sponsored and over 76% choosing organic.



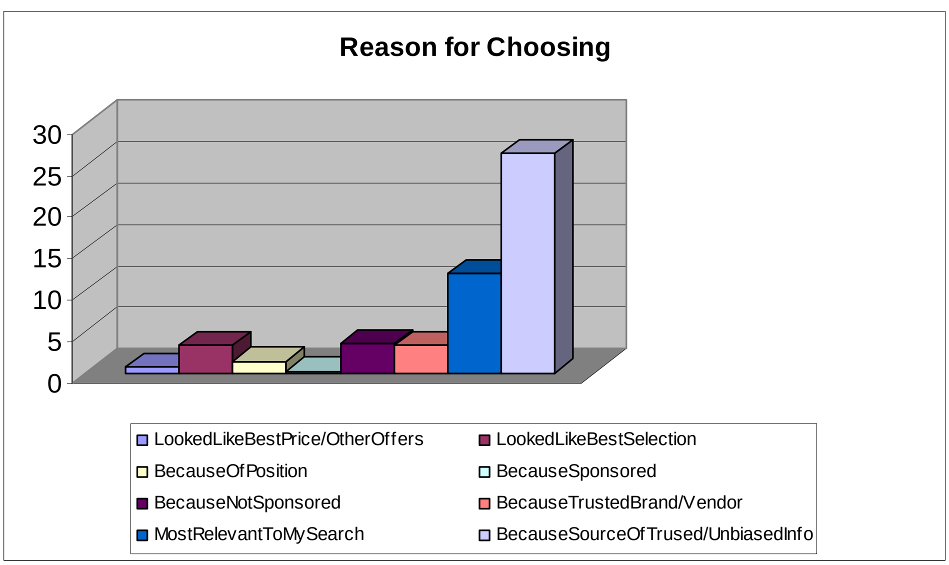
Question 14:

What was your main reason for choosing the link you did in the previous question?

1. Looked like best price/other offers
2. Looked like best selection
3. Because of position
4. Because not sponsored
5. Most relevant to my search
6. Looked like best selection
7. Because sponsored
8. Because trusted brand/vendor
9. Because source of trusted/unbiased information

Response	Percentage
Looked like best price/other offers	1.39
Looked like best selection	6.48
Because of position	2.78
Because sponsored	0.46
Because not sponsored	6.94
Because trusted brand/vendor	6.48
Most relevant to my search	23.61
Because source of trusted/unbiased info	51.85

When asking for the participants reasons for choosing a link, we collected open answers and then categorized into 9 groups, as shown above. By far the most popular reason (with almost 52%) was because the listing offered trusted or unbiased information. The next most popular reason was that the listing was relevant to the search query (at almost 24%).



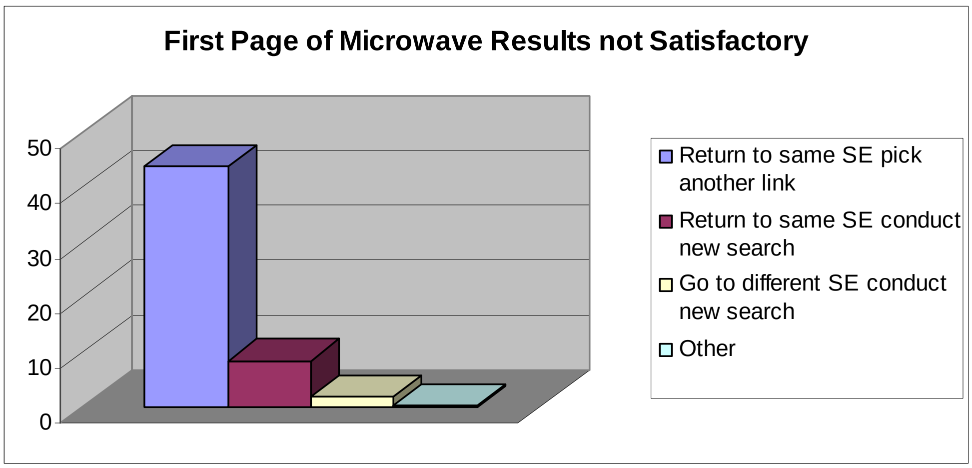
Question 15:

If the first link you chose from the microwave search results page did not provide the information you wanted, what would you do?

1. Return to same SE pick another link
2. Return to same SE conduct new search
3. Go to different SE conduct new search
4. Other

Response	Percentage
Return to same SE pick another link	78.15
Return to same SE conduct new search	15.13
Go to different SE conduct new search	3.36
Other	0.84

Participants indicated that the majority (over 78%) would return to the page of results if the first link they chose proved not to be satisfactory. This confirms findings in our focus group research (Inside the Mind of the Searcher) where the page of search results was often used as a navigation "menu", with the searcher clicking back to it often in the search process.



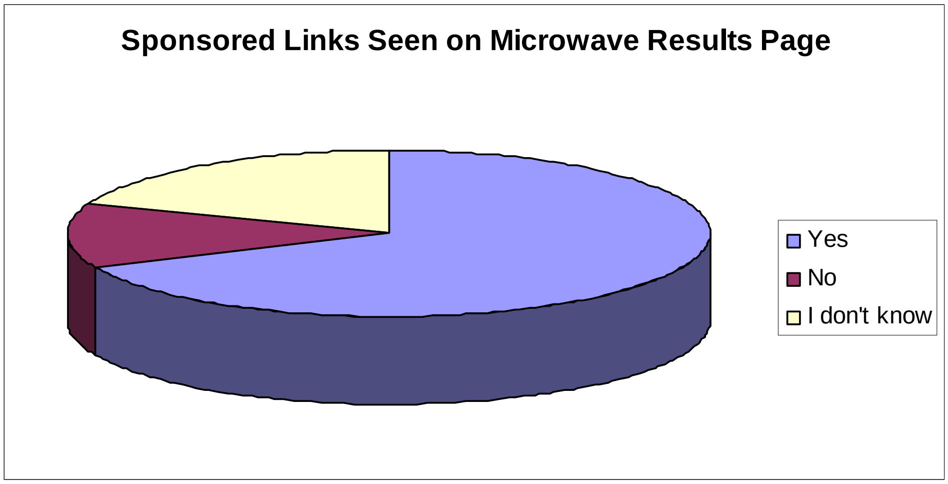
Question 16:

Did you see any sponsored links (paid for by the advertiser) on the microwave search results page?

1. Yes
2. No
3. I don't know

Response	Percentage
Yes	66.38655
No	12.18487
I don't know	18.48739

After seeing a page of search results where 5 sponsored results were shown, we asked participants if they saw sponsored links on the page. There was confusion shown in over 30% of the participants, who either said no or they didn't know.

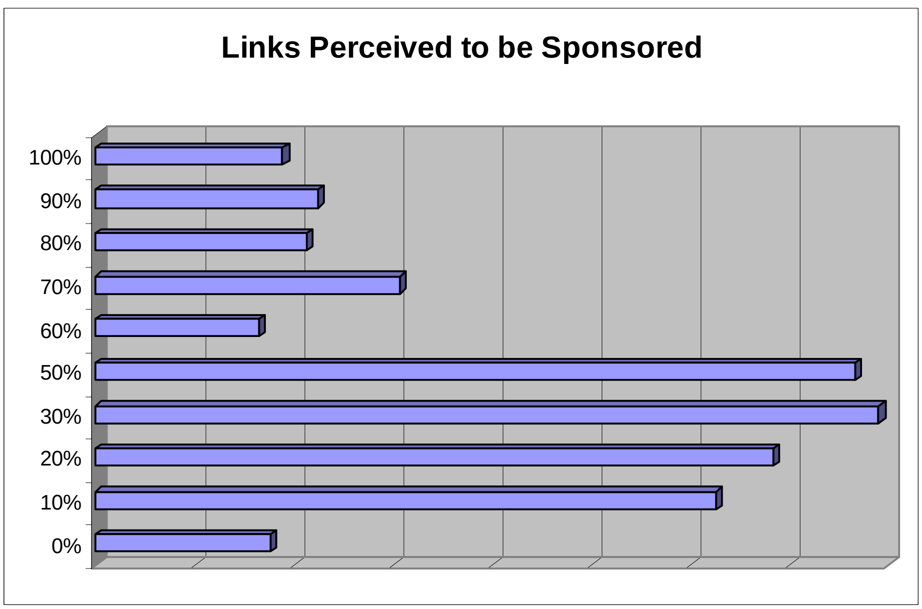


Question 17:

Response	Percentage
0%	4.18
10%	14.76
20%	16.16
30%	18.66
50%	18.11
60%	3.90
70%	7.24
80%	5.01
90%	5.29
100%	4.46

If you were to use your usual search engine to find information about a new desktop printer, what percentage of listings that appeared on the results page do you believe would be sponsored links?

There seemed to be some confusion about the percentage of sponsored listings shown on a page. Depending on the engine, the sponsored listings generally make up about 30 to 60% of those shown. One third of participants thought the number to be less than this range, while about 20% thought the number to be higher.



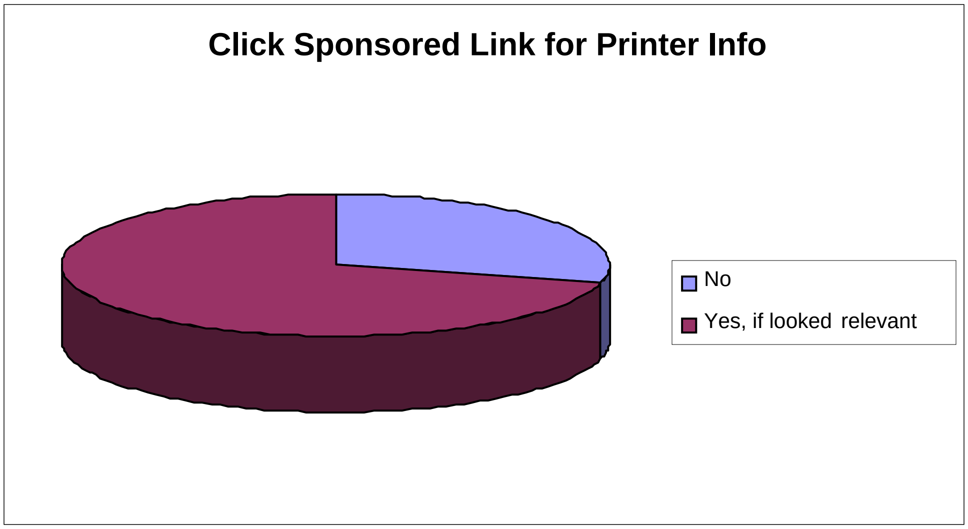
Question 18:

Would you click on a sponsored link to get information about desktop printers?

1. No
2. Yes, if looked relevant

Response	Percentage
No	28.57143
Yes, if looked relevant	69.7479

While there was some resistance to sponsored listings amongst almost 29% of the participants, about 70% indicated they had no problems with them. Ironically, this number flips when looking at the participants that actually choose sponsored links, indicating that although they have no bias against sponsored links, a significant percentage of users do tend to look at the organic findings first. This was clearly seen in the focus group research.



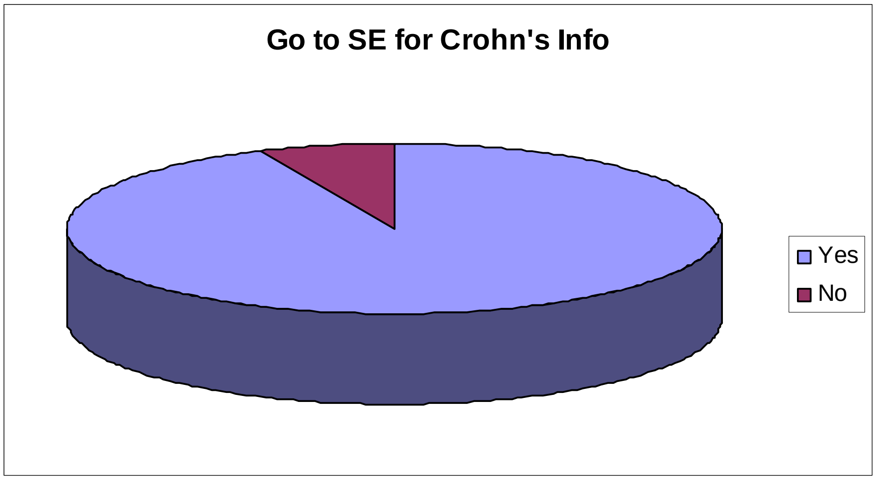
Question 20:

Would you go to a search engine to get information about Crohn's Disease?

1. Yes
2. No

Response	Percentage
Yes	91.35447
No	6.628242

Not surprisingly, when given a pure research scenario (not tied to a commercial activity) the majority of users (over 91%) indicated they would go to a search engine, indicating that search engines have become a primary research tool.



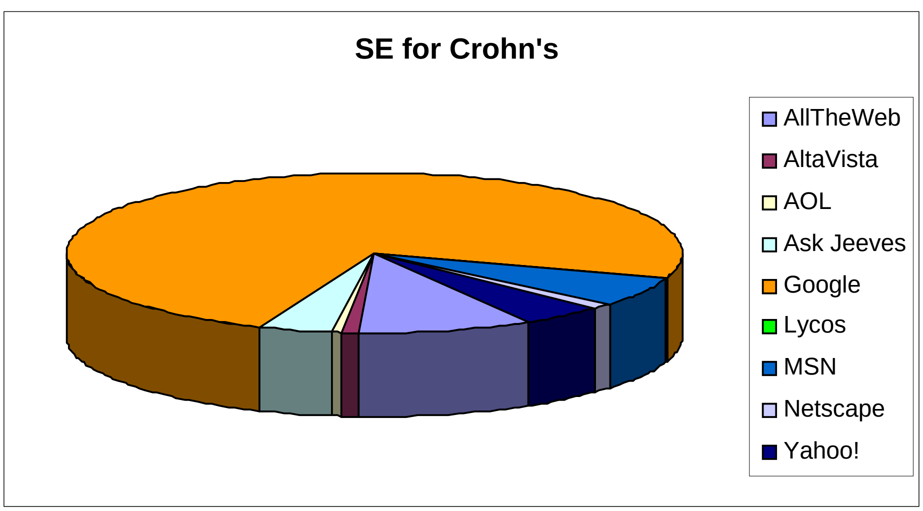
Question 21:

What search engine would you use to find information on Crohn's disease?

1. AllTheWeb
2. AltaVista
3. AOL
4. Ask Jeeves
5. Google
6. Lycos
7. MSN
8. Netscape
9. Yahoo!

Response	Percentage
All The Web	8.67
AltaVista	0.93
AOL	0.62
Ask Jeeves	3.72
Google	70.90
Lycos	0.31
MSN	5.57
Netscape	0.93
Yahoo!	4.33

We asked participants to indicate which engine they would use for this query.

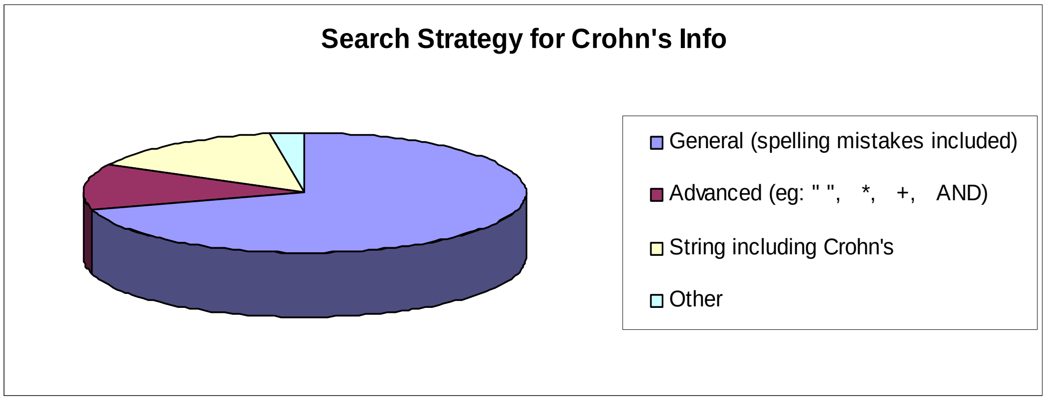


Question 22:

Assume you did go to a search engine, what exactly would you type in the search box to get information about Crohn's disease?

Response	Percentage
General (spelling mistakes included)	70.61
Advanced (eg: " ", *, +, AND)	12.14
String including Crohn's	14.70
Other	2.56

Again, we see that the majority of users (over 70%) tend to use a general, inclusive phrase when starting their search.

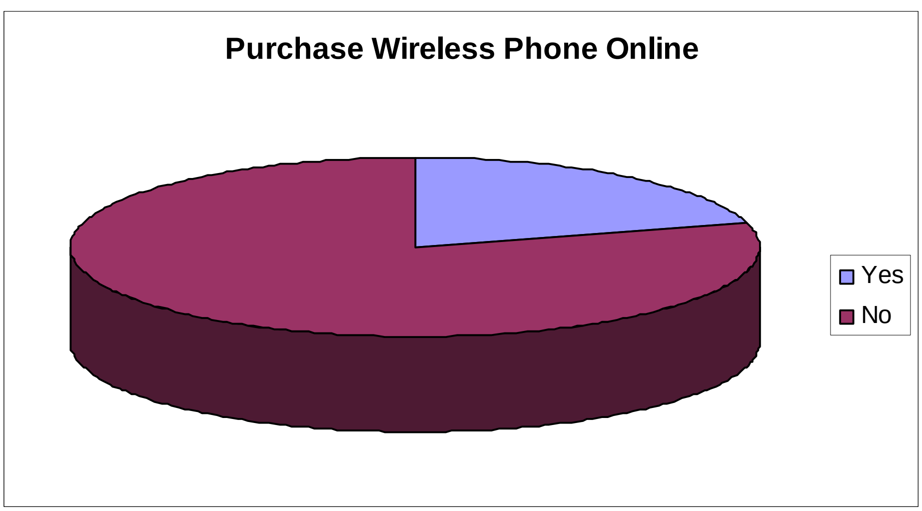


Question 25:

If you needed a new wireless phone, would you purchase it online?
1. Yes
2. No

Response	Percentage
Yes	20.12
No	77.81

As noted before, there is a significant drop off of consumers when asked if they're willing to make a purchase online. Of course, this percentage will vary greatly with the type of item being purchased.



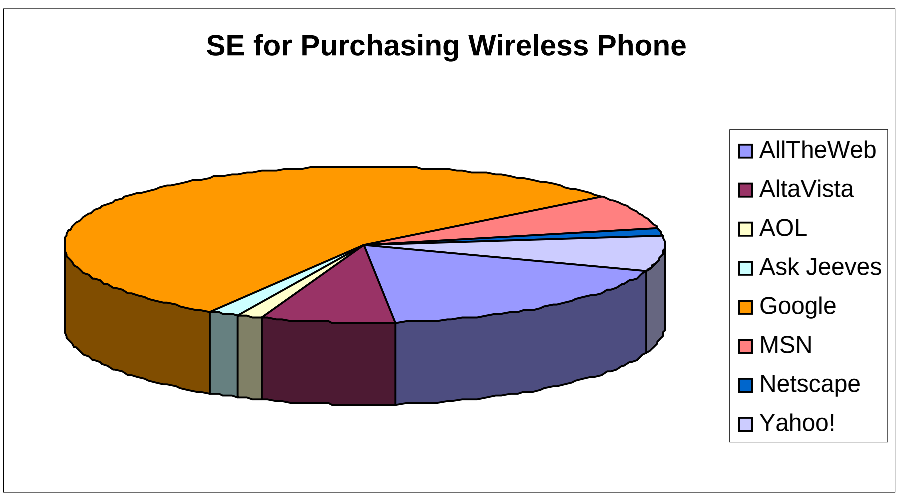
Question 26:

If so, which of the following would be your choice to find the best place to purchase it?

1. AllTheWeb
2. AltaVista
3. AOL
4. Ask Jeeves
5. Google
6. Lycos
7. MSN
8. Netscape
9. Yahoo!

Response	Results
All The Web	16.00
AltaVista	6.67
AOL	1.34
Ask Jeeves	1.34
Google	50.67
MSN	6.67
Netscape	1.34
Yahoo!	6.67

Response to this question was interesting when one looks at the drop off of Google users, from about 70% in previous scenarios, to just over 50% here. In other questions, there was no real indication that Google users were less likely to purchase online, but perhaps this indicates they may switch to another engine (such as All the Web) when looking for a site to purchase from. Perhaps users find All the Web results more relevant for purchase type queries, given Google's non commercial tendency in organic listings.



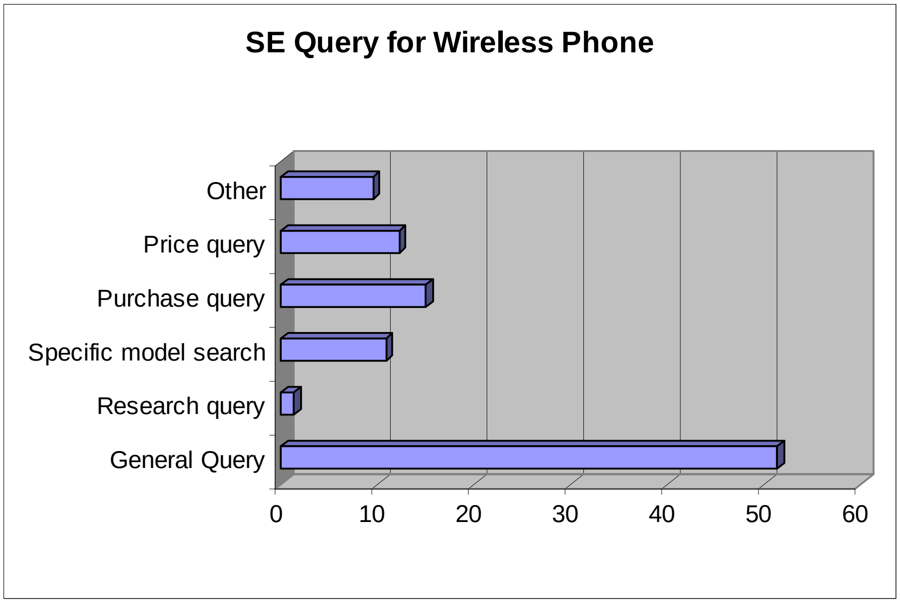
Question 27:

What exactly would you type in the search box to find a website to purchase the cordless phone?

1. General query
2. Research query
3. Specific model search
4. Purchase query
5. Price query
6. Other

Response	Percentage
General Query	51.35
Research query	1.35
Specific model search	10.81
Purchase query	14.86
Price query	12.16
Other	9.46

Again, we allowed participants to type in their exact search query, then grouped the queries into one of the 6 categories shown above. Over half of the participants started their search with a general query (i.e. "wireless phones").



Question 28:

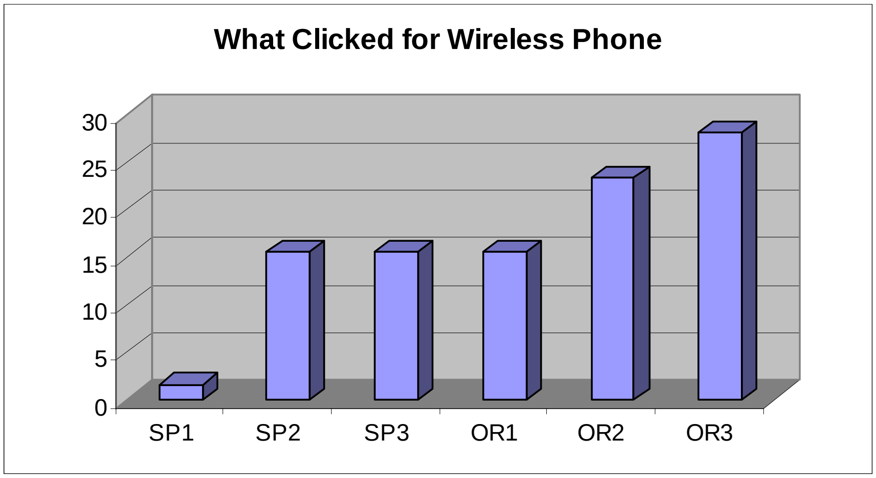
Assume you have already done your research and are now looking to purchase your phone. Which result would you click first?

Response	Percentage
SP1	1.56
SP2	15.6
SP3	15.6
OR1	15.6
OR2	23.44
OR3	28.13

We asked participants to choose from a page of simulated search results that contained a fair distribution of the following types of links:

SP1	Sponsored – Generic Buying Sites (offered prices, multiple brand selection, ecommerce)
SP2	Sponsored – Trusted Brand or Vendor sites (offered information and ability to purchase along with trusted names in description)
SP3	Sponsored – Consumer Research sites (sites like Consumer Reports that offer unbiased product reviews)
OR1	Organic – Generic Buying Sites (offered prices, multiple brand selection, ecommerce)
OR2	Organic – Trusted Brand or Vendor sites (offered information and ability to purchase along with trusted names is description)
OR3	Organic – Consumer Research sites (sites like Consumer Reports that offer unbiased product reviews)

Almost 33% chose sponsored links, while over 67% chose organic links. As participants moved from the research phase to the purchase phase of the buying cycle, there was a corresponding shift in the types of links chosen. Sites that offered trusted brands, or trusted vendor sites (such as Amazon.com) became more attractive. Also, online e-commerce sites also rose in popularity. Surprisingly, even though the question was specifically worded to indicate the research into the product was already complete, a product research site was still the number one pick. This could be due to participants not reading the question carefully, but it could also mean that these sites continue to be attractive to the searcher, even well into the purchase decision.

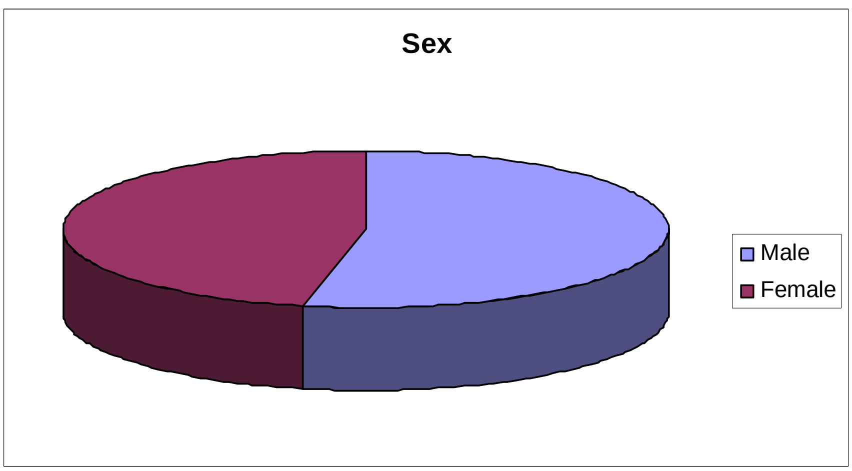


Response	Percentage
Male	52.41
Female	47.59

Question 30:

What is your sex?

1. Male
2. Female

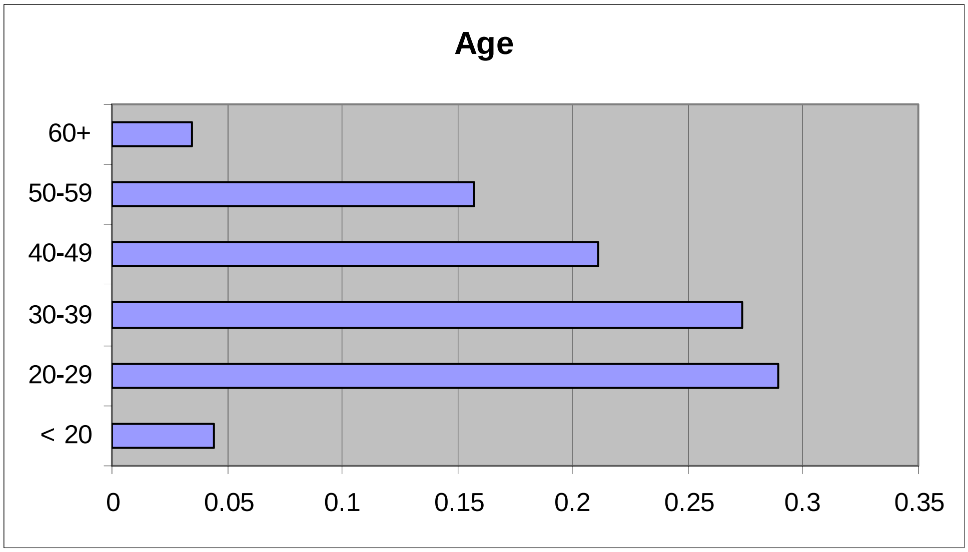


Response	Percentage
< 20	4.40
20-29	28.93
30-39	27.36
40-49	20.13
50-59	15.72
60+	3.46

Question 31:

How old are you? What year were you born?

1. 14-18
2. 19-29
3. 30-39
4. 40-49
5. 50-59
6. 60-69
7. 70-79

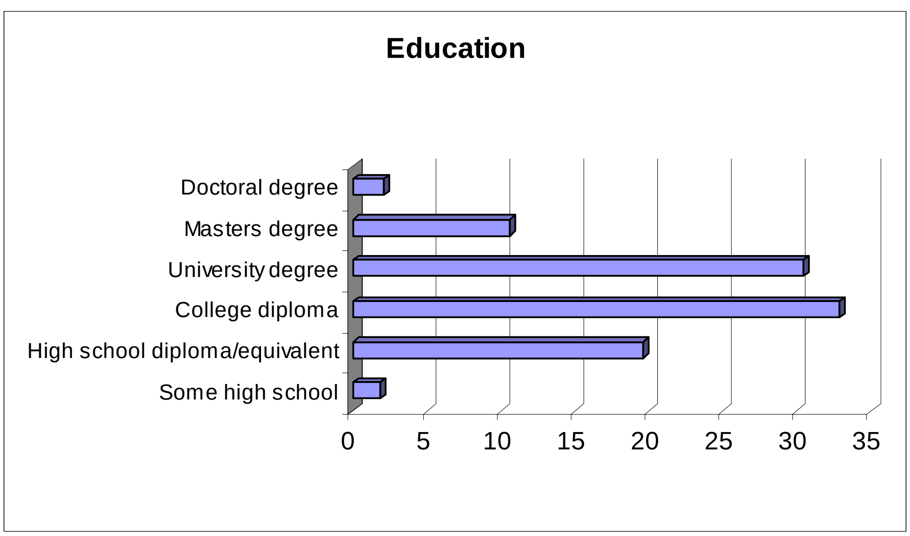


Question 32:

Please indicate the highest level of education you have achieved (if you are currently a student, indicate the most applicable).

1. Some high school
2. High school diploma/equivalent
3. College diploma
4. University degree
5. Masters degree
6. Doctoral degree

Education	Percentage
Some high school	1.81
High school diploma/equivalent	19.64
College diploma	32.93
University degree	30.51
Masters degree	10.57
Doctoral degree	2.11

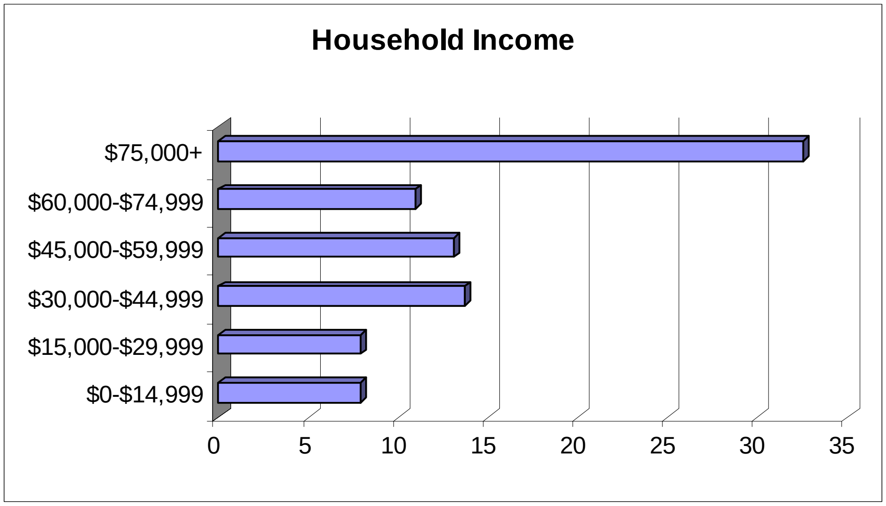


Question 34:

What is your annual household income (in your home currency)?

1. $0-$14,999
2. $15,000-$29,999
3. $30,000-$44,999
4. $45,000-$59,999
5. $60,000-$74,999
6. $75,000 +

Income	Percentage
$0-$14,999	7.90
$15,000-$29,999	7.90
$30,000-$44,999	13.68
$45,000-$59,999	13.07
$60,000-$74,999	10.94
$75,000+	32.52

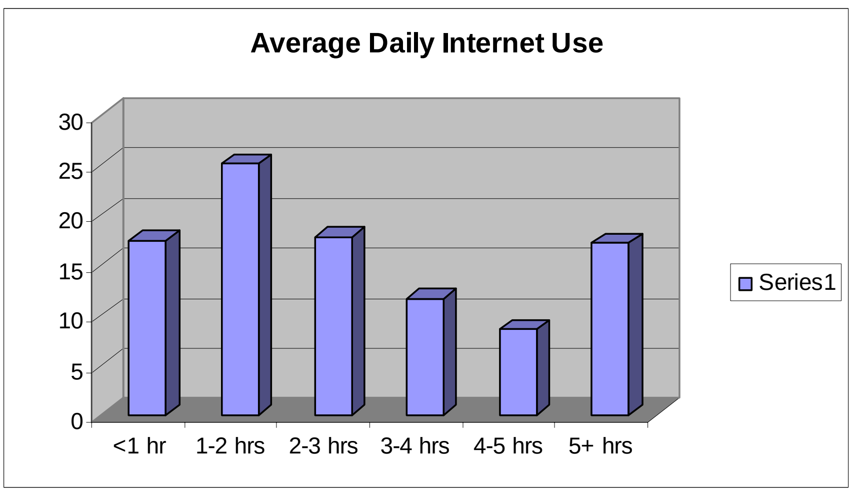


Question 35:

In an average day, how much time do you spend using the Internet?

1. <1 hr
2. 1-2 hrs
3. 2-3 hrs
4. 3-4 hrs
5. 4-5 hrs
6. 5+ hrs

Hrs of use	Percentage
<1 hr	17.48466
1-2 hrs	25.15337
2-3 hrs	17.79141
3-4 hrs	11.65644
4-5 hrs	8.588957
5+ hrs	17.17791

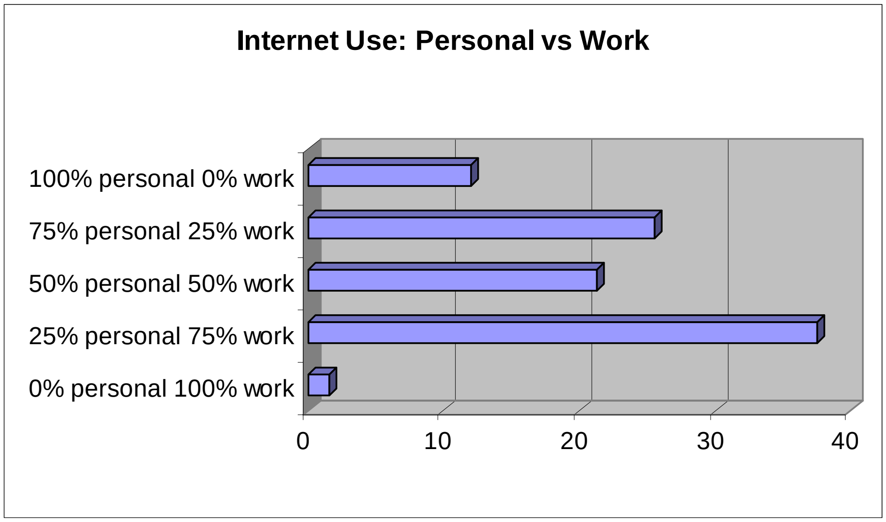


Question 36:

Rate your personal / work use of the internet.

1. 0% personal 100% work
2. 35% personal 75% work
3. 50% personal 50% work
4. 75% personal 25% work
5. 100% personal 0% work

Personal / Work	Percentage
0% personal 100% work	1.54
25% personal 75% work	37.54
50% personal 50% work	21.23
75% personal 25% work	25.54
100% personal 0% work	12.00

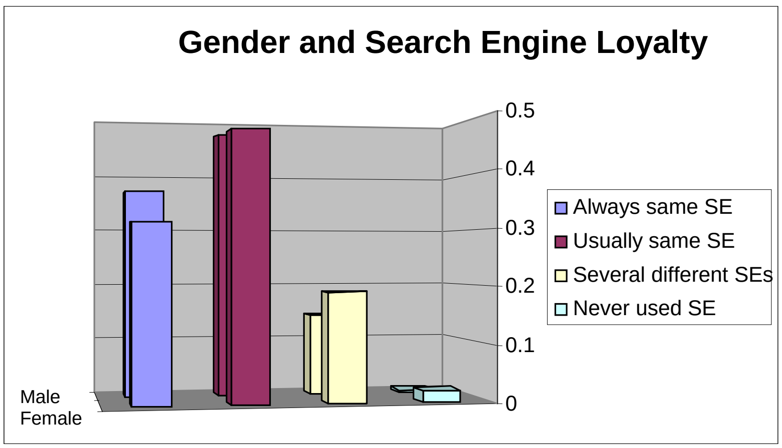


Gender Variations in Search Engine Usage

Gender & Search Loyalty

	Always same SE	Usually same SE	Several different SEs	Never used SE
Male	0.367816092	0.471264	0.143678	0.005747
Female	0.309210526	0.467105	0.190789	0.019737

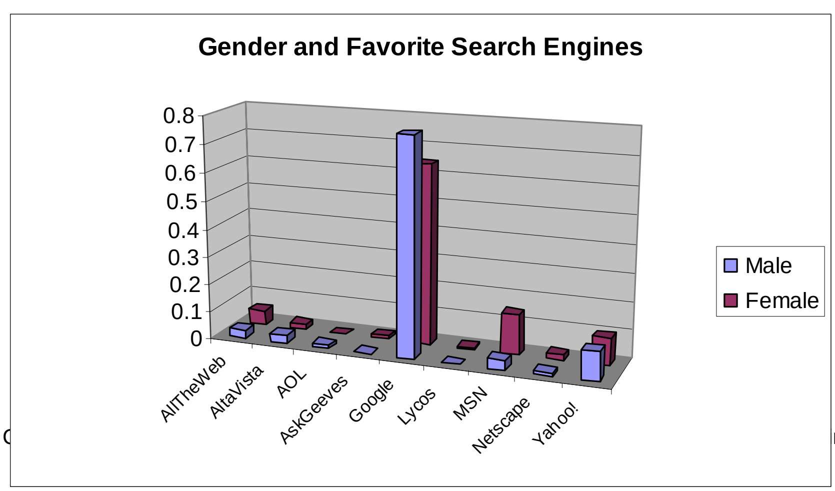
Males seemed to be more likely to stick with one engine, with almost 37% of males indicating they use the same engine, compared to 31% of females. Conversely, over 19% of females said they use several different engines, and only 14.4% of males indicated this to be the case. This was confirmed by another question, in which almost 34% of males said they use their favored search engine for 100 % of their searches, compared to almost 27% for females.



Gender and Favorite Engine

	AltaVista	Google	MSN	Yahoo!
Male	0.029412	0.776471	0.035294	0.105882
Female	0.019737	0.644737	0.144737	0.098684

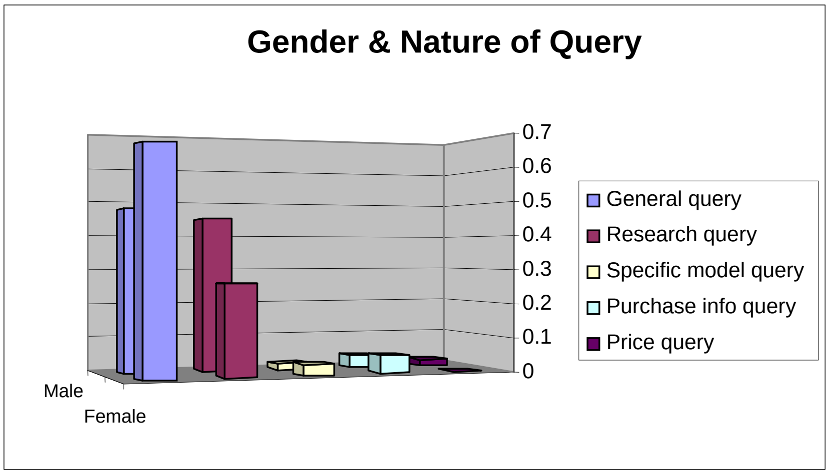
Males also appeared to favor Google more than females, with almost 78% of men indicating they prefer Google, as compared to 64.5% of women. For women, MSN played the role of next most popular engine, with 14.5% naming it as their favorite, compared to just 3.5% of the men. Yahoo usage was almost equal, with 10.6% for men, compared to 9.8% for women. Perhaps one reason for MSN's popularity with women comes from the fact that it is the default home page for Explorer, and they may be less likely than men to change this default.



Gender and Nature of Search Query

	General query	Research query	Specific model query	Purchase info query	Price query
Male	0.477064	0.449541	0.018349	0.036697	0.018349
Female	0.652632	0.263158	0.031579	0.052632	0

In looking at the structure of queries, men tended to be more specific in their search phrases, with only 47.7% of them using a generic query (i.e. "microwave ovens") and 44.9% of them using a more specific research based query (i.e. "microwave oven reviews" or "microwave oven features"). With women, 65.3% used a generic query and 26.3% used a more specific research based query.



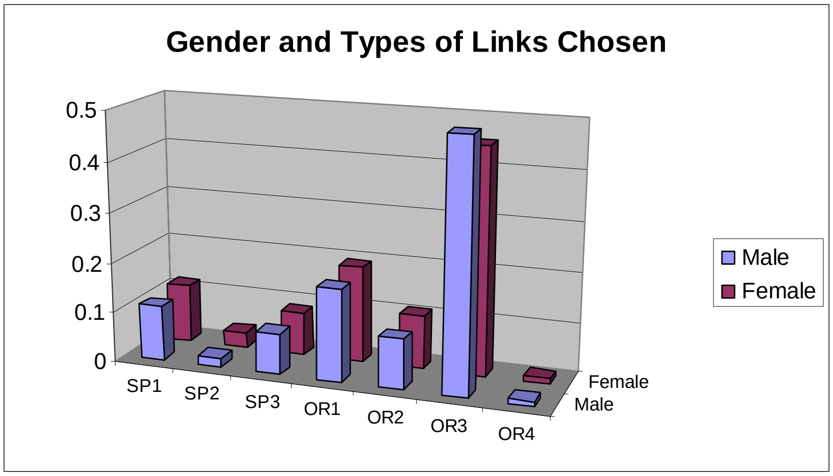
This may be supported by the fact that men were a bit more likely to use advanced search features. 24.7% of men indicated they used these features "often" as opposed to women at 16.4%

Gender and Results Chosen

	SP1	SP2	SP3	OR1	OR2	OR3	OR4
Male	0.110092	0.018349	0.082569	0.183486	0.100917	0.495413	0.009174
Female	0.11828	0.032258	0.086022	0.193548	0.107527	0.451613	0.010753

Despite the differences in favorite engines and search patterns, men and women were remarkably consistent in the results chosen. When researching an upcoming purchase, both men and women were generally only one percentage point apart in the types of links chosen. For reference, here is the key to the type of links shown in the chart below.

SP1	Sponsored – Generic Buying Sites (offered prices, multiple brand selection, ecommerce)
SP2	Sponsored – Trusted Brand or Vendor sites (offered information and ability to purchase along with trusted names in description)
SP3	Sponsored – Consumer Research sites (sites like Consumer Reports that offer unbiased product reviews)
SP4	Sponsored – Information Sites (sites with general information about the product)
OR1	Organic – Generic Buying Sites (offered prices, multiple brand selection, ecommerce)
OR2	Organic – Trusted Brand or Vendor sites (offered information and ability to purchase along with trusted names is description)
OR3	Organic – Consumer Research sites (sites like Consumer Reports that offer unbiased product reviews)
OR4	Organic – Information Site (sites with general information about the product)



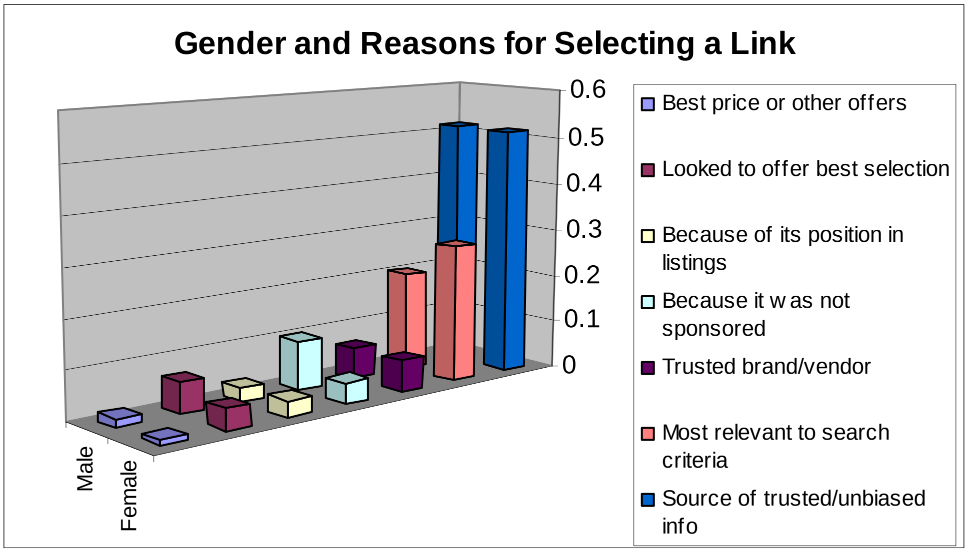
For both men and women, a trusted site that offers unbiased information within the organic results (OR3) was the clear favorite, with 49.5% of men choosing it, and 45.2% of women.

There was also little difference in the likelihood of choosing a sponsored link. 21% of men chose a sponsored link, as compared to 23.6% of women.

Gender and Reasons for Choosing a Link

When asked their reasons for choosing the link, again there was a marked similarity between genders. In both cases, the main reason given (with approximately 51.5% of both men and women) was that it appeared to offer a source of trusted or unbiased information. The only variations were with feelings towards sponsored links (10.3% of men chose a link specifically because it wasn't sponsored, as opposed to 4.4% of women) and relevancy (28.6% of women said relevancy was the main reason, 20.6% of men). However, it was observed that while men stated that they preferred not to select a sponsored listing, when they were asked to select a listing to purchase a phone in Question 28, far more men actually choose a sponsored listing that the women (41% vs. 20%).

	Best price or other offers	Looked to offer best selection	Because of its position in listings	Because it was not sponsored	Trusted brand/vendor	Most relevant to search criteria	Source of trusted/unbiased info
Male	0.018692	0.065421	0.028037	0.102804	0.065421	0.205607	0.514019
Female	0.010989	0.043956	0.032967	0.043956	0.065934	0.285714	0.516484


Gender and Reasons for Selecting a Link
0.6
0.5
0.4
0.3
0.2
0.1
0
Male
Female
Best price or other offers
Looked to offer best selection
Because of its position in listings
Because it w as not sponsored
Trusted brand/vendor
Most relevant to search criteria
Source of trusted/unbiased info

Education Variations in Search Engine Usage

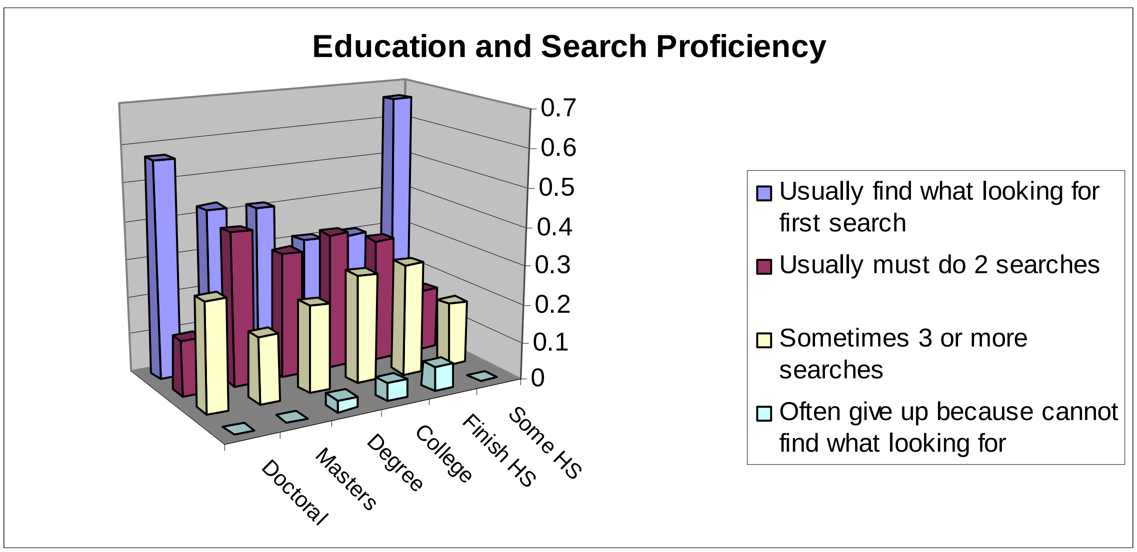
Note: We found anomalies in both the "Some High School" and "Doctoral" groups, which may be caused by the small sample size in both (under 2% of the total sample in both cases). We have noted the results, but ask the reader to remember that this may mean that results aren't representative of the group as a whole.

Also, we have found that education and the exposure to internet research in university and more recently in high school has led to a higher degree of proficiency amongst younger and more educated users.

Education and Search Proficiency

Generally, we found the higher the education level, the more likely the user will find what they were looking for in fewer searches. The one exception was the "Some High School" group, who had a high degree of search proficiency. This could be due to the relatively young age of this group (most are students who are still in High School) and their native comfort with the Internet.

	Usually find what looking for first search	Usually must do 2 searches	Sometimes 3 or more searches	Often give up because cannot find what looking for
Some HS	0.666666667	0.166666667	0.166667	0
Finish HS	0.307692308	0.323076923	0.292308	0.061538
College	0.311926606	0.357798165	0.284404	0.045872
Degree	0.415841584	0.326732673	0.227723	0.029703
Masters	0.428571429	0.4	0.171429	0
Doctoral	0.571428571	0.142857143	0.285714	0



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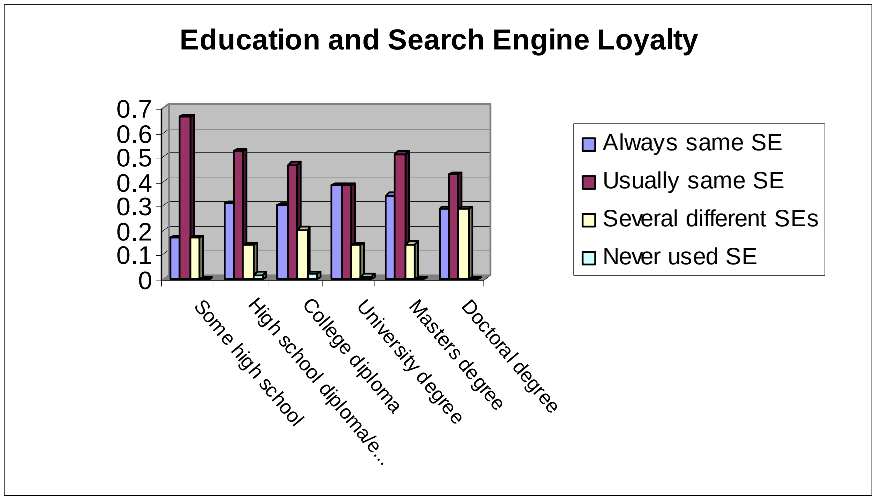
Education and Search Engine Loyalty

We also found that the tendency to be loyal to one search engine increases with the education level until the University degree level, then drops again with those at the Masters and Doctoral levels.

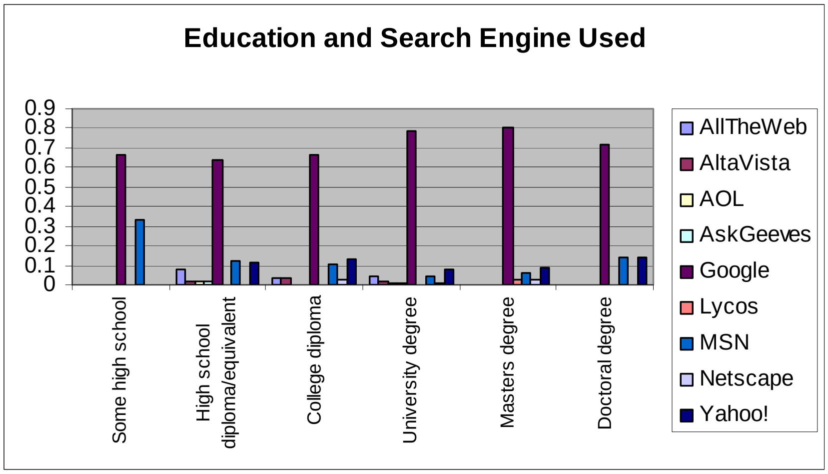
	Always same SE	Usually same SE	Several different SEs
Some high school	0.166667	0.666667	0.166667
High school diploma/equivalent	0.307692	0.523077	0.138462
College diploma	0.302752	0.46789	0.201835
University degree	0.385321	0.385321	0.137615
Masters degree	0.342857	0.514286	0.142857
Doctoral degree	0.285714	0.428571	0.285714



Education and Preferred Search Engine

We also found an increased affinity for Google as education levels increased. Both the University level group and the Masters level group indicated Google as their preferred engine with almost 80% of respondents. This number dropped slightly to 71.4% at the Doctoral level.

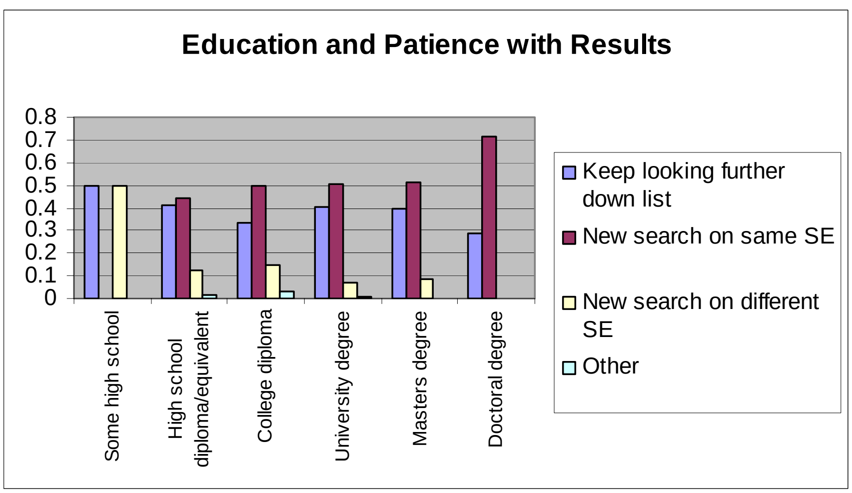
	All The Web	AltaVista	Google	MSN	Netscape	Yahoo!
Some high school	0	0	0.666667	0.333333	0	0
High school diploma/equivalent	0.078125	0.015625	0.640625	0.125	0	0.109375
College diploma	0.037037	0.037037	0.666667	0.101852	0.027778	0.12963
University degree	0.040404	0.020202	0.787879	0.040404	0.010101	0.080808
Masters degree	0	0	0.8	0.057143	0.028571	0.085714
Doctoral degree	0	0	0.714286	0.142857	0	0.142857



Education and Patience with Search Results

	Keep looking further down list	New search on same SE	New search on different SE	Other
Some high school	0.5	0	0.5	0
High school diploma/equivalent	0.415385	0.446154	0.123077	0.015385
College diploma	0.330275	0.495413	0.146789	0.027523
University degree	0.405941	0.50495	0.069307	0.009901
Masters degree	0.4	0.514286	0.085714	0
Doctoral degree	0.285714	0.714286	0	0

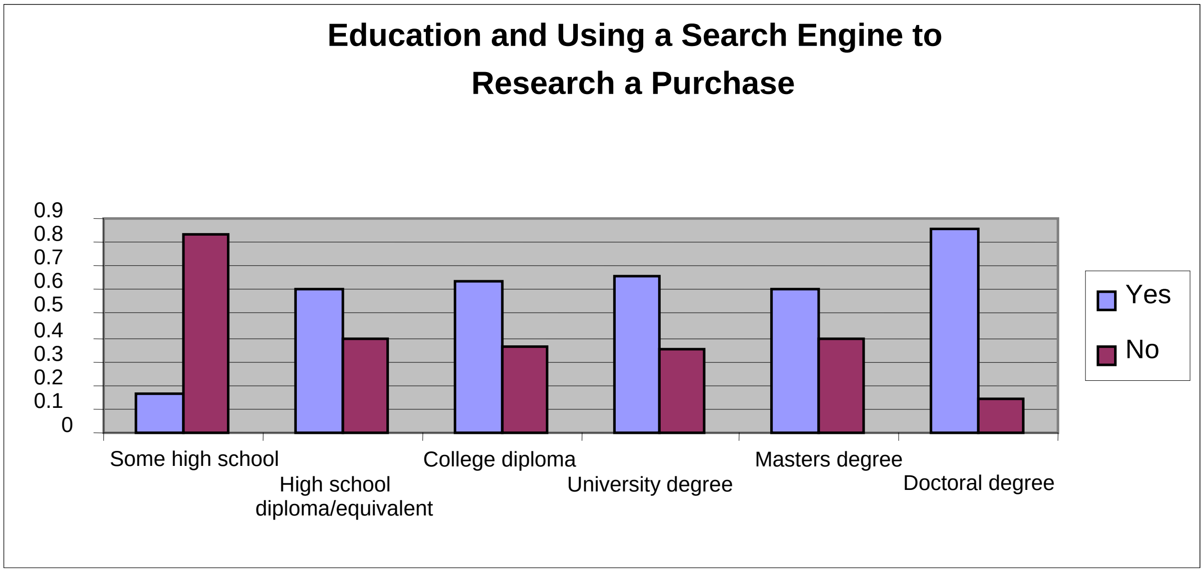
We also found that those groups with higher education were more likely to launch a new search rather than continue looking further down the list of results if they weren't happy with the top results seens. At the University, Masters and Doctoral level, over 50% (and 71.4% in the case of the Doctoral participants) said they would launch a new search on the same engine.



Education and Using a Search Engine to Research a Purchase

Generally, as education increased, so did the likelihood that a search engine would be used to assist in researching an upcoming purchase. This ranged from 60% of respondents in the Masters and High Scool Category category to 85.7% in the Doctoral category.

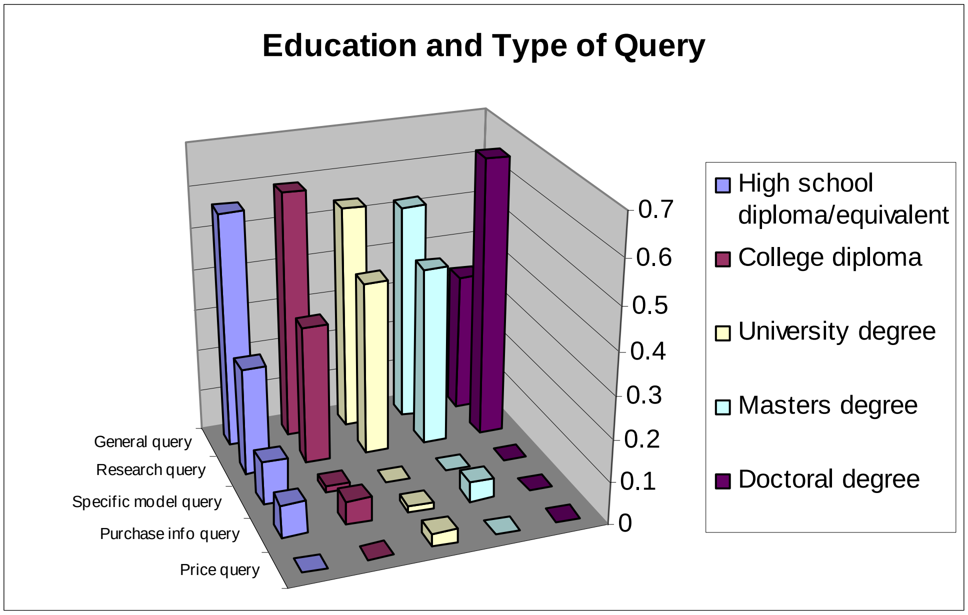
	General query	Research query	Specific model query	Purchase info query	Price query
High school diploma/equivalent	0.564103	0.25641	0.102564	0.076923	0
College diploma	0.594203	0.333333	0.014493	0.057971	0
University degree	0.538462	0.415385	0	0.015385	0.030769
Masters degree	0.52381	0.428571	0	0.047619	0
Doctoral degree	0.333333	0.666667	0	0	0



Education and Type of Query

	Yes	No
Some high school	0.166667	0.833333
High school diploma/equivalent	0.6	0.4
College diploma	0.633028	0.366972
University degree	0.653465	0.346535
Masters degree	0.6	0.4
Doctoral degree	0.857143	0.142857

When looking at the structure of search queries in the product research scenario, we found that those groups with higher education were more likely to use a research type query (i.e. “microwave oven reviews” or “microwave oven comparisons”) than those with lower education. At the High School and College level, approximately 57.4% used a general query (i.e. “microwaves” or “microwave ovens”) compared to approximately 29% using a research query. At the University and Masters level, approximately 53% used a general query and 42% used a research query. The numbers were even higher at the Doctoral level, with 33.3% using a general query and 66.6% using a research query.



Education and Links Chosen

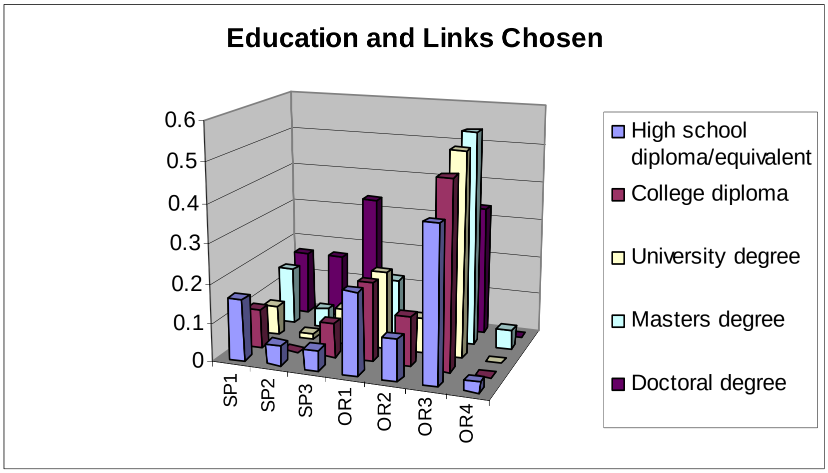
In looking at the links chosen, generally we see that the higher the education level, the more likely the group will choose a link that provides trusted and unbiased information. Again, the key for the results chosen is as follows.

SP1	Sponsored – Generic Buying Sites (offered prices, multiple brand selection, ecommerce)
SP2	Sponsored – Trusted Brand or Vendor sites (offered information and ability to purchase along with trusted names in description)
SP3	Sponsored – Consumer Research sites (sites like Consumer Reports that offer unbiased product reviews)
SP4	Sponsored – Information Sites (sites with general information about the product)
OR1	Organic – Generic Buying Sites (offered prices, multiple brand selection, ecommerce)
OR2	Organic – Trusted Brand or Vendor sites (offered information and ability to purchase along with trusted names is description)
OR3	Organic – Consumer Research sites (sites like Consumer Reports that offer unbiased product reviews)
OR4	Organic – Information Site (sites with general information about the product)

	SP1	SP2	SP3	OR1	OR2	OR3	OR4
High school diploma/equivalent	0.157895	0.052632	0.052632	0.210526	0.105263	0.394737	0.026316
College diploma	0.101449	0	0.086957	0.202899	0.130435	0.478261	0
University degree	0.076923	0.015385	0.092308	0.2	0.092308	0.523077	0
Masters degree	0.15	0.05	0.05	0.15	0	0.55	0.05
Doctoral degree	0.166667	0.166667	0.333333	0	0	0.333333	0

The percentage choosing OR3, consumer research sites found within organic results, increased consistently as the education level increased, with the exception of the Doctoral group, who seemed to show a tendency to choose sponsored links in this scenario.

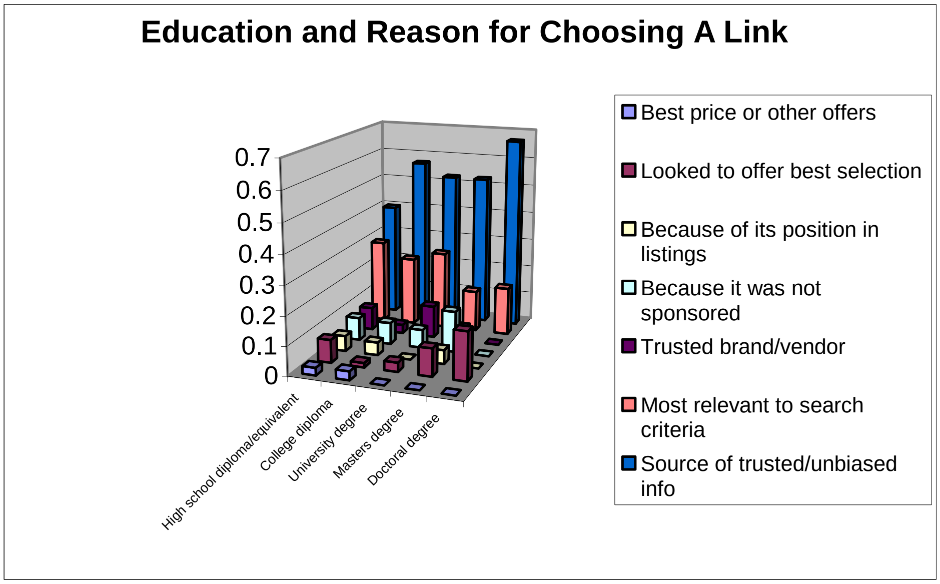
Generally, when looking at the percentage choosing sponsored vs organic, 26.1% of those with a high school education chose sponsored, compared to 18.8% amongst college educated participants, 18.4% amongst University educated, 25% amongst Master degree holders, and 66.5% of those with a Doctoral degree. Again, as noted, the small sample size in this last group has to be considered when looking at these numbers.



Education and Reason for Choosing a Link

When asked why they chose the link they did in the product research scenario, the education level of participants did seem to play a role. Resistance to sponsored listings seemed to be a factor with those candidates holding a Master's degree, with 14.3% of them citing the fact that a link was not sponsored as being the primary reason for choosing it. Links that offered a source of trusted, unbiased information seemed to be more attractive to groups with higher education levels. Finally, relevance seemed to be a more important reason for those at lower education levels.

	Best price or other offers	Looked to offer best selection	Because of its position in listings	Because it was not sponsored	Trusted brand/ vendor	Most relevant to search criteria	Source of trusted/ unbiased info
High school diploma/equivalent	0.026316	0.078947	0.052632	0.078947	0.078947	0.289474	0.394737
College diploma	0.029851	0.014925	0.044776	0.074627	0.029851	0.238806	0.567164
University degree	0	0.031746	0	0.063492	0.111111	0.269841	0.52381
Masters degree	0	0.095238	0.047619	0.142857	0.047619	0.142857	0.52381
Doctoral degree	0	0.166667	0	0	0	0.166667	0.666667

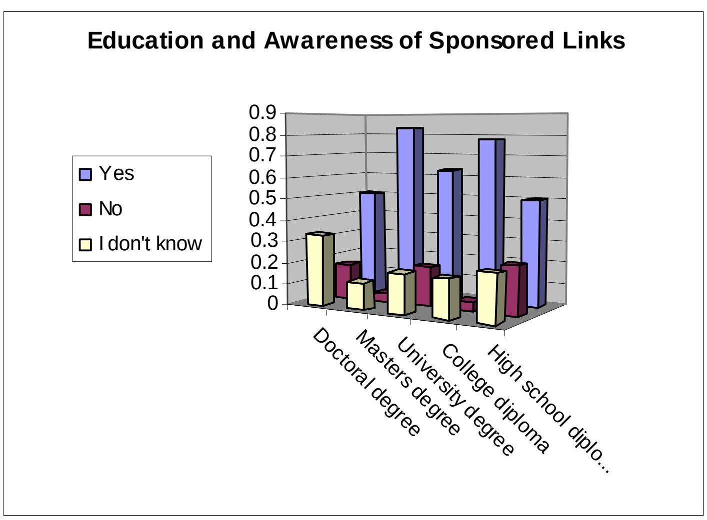


Education and Awareness of Sponsored Links

	Yes	No	I don't know
High school diploma/equivalent	0.5	0.225	0.225
College diploma	0.777778	0.041667	0.180556
University degree	0.628571	0.185714	0.185714
Masters degree	0.833333	0.041667	0.125
Doctoral degree	0.5	0.166667	0.333333

When we looked at awareness of sponsored links (asking respondents who had just looked at a page of search results whether there were sponsored links on the page) we found the level of awareness generally increased with the education level, with the two notable exceptions. In this case, either the answer “No, I didn’t see any sponsored links” (there were in fact 5 sponsored links on each page) or the answer “I don’t know” indicated a low level of awareness.

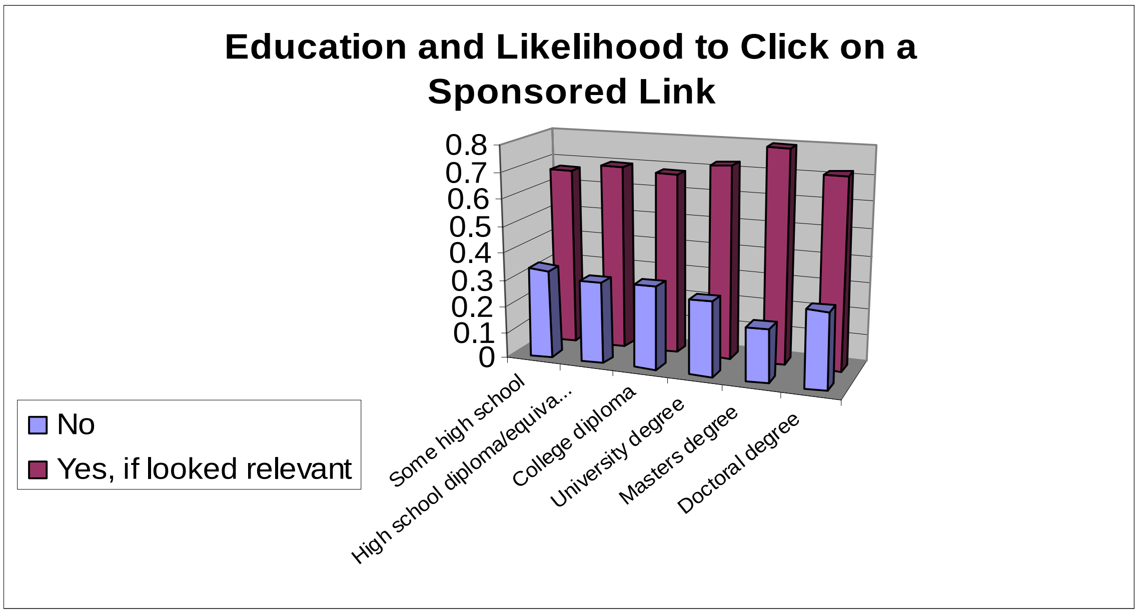
At the High School education level, 45% of respondents weren’t aware of sponsored links. At the Masters level, only 16.6% weren’t aware of sponsored links. The two exceptions were at the University level, where 37% weren’t aware of sponsored links, and the Doctoral level, where a full 50% weren’t aware of sponsored links.



Education and Acceptance of Sponsored Links

	No	Yes, if looked relevant
Some high school	0.333333	0.666667
High school diploma/equivalent	0.307692	0.692308
College diploma	0.311927	0.678899
University degree	0.277228	0.722772
Masters degree	0.2	0.8
Doctoral degree	0.285714	0.714286

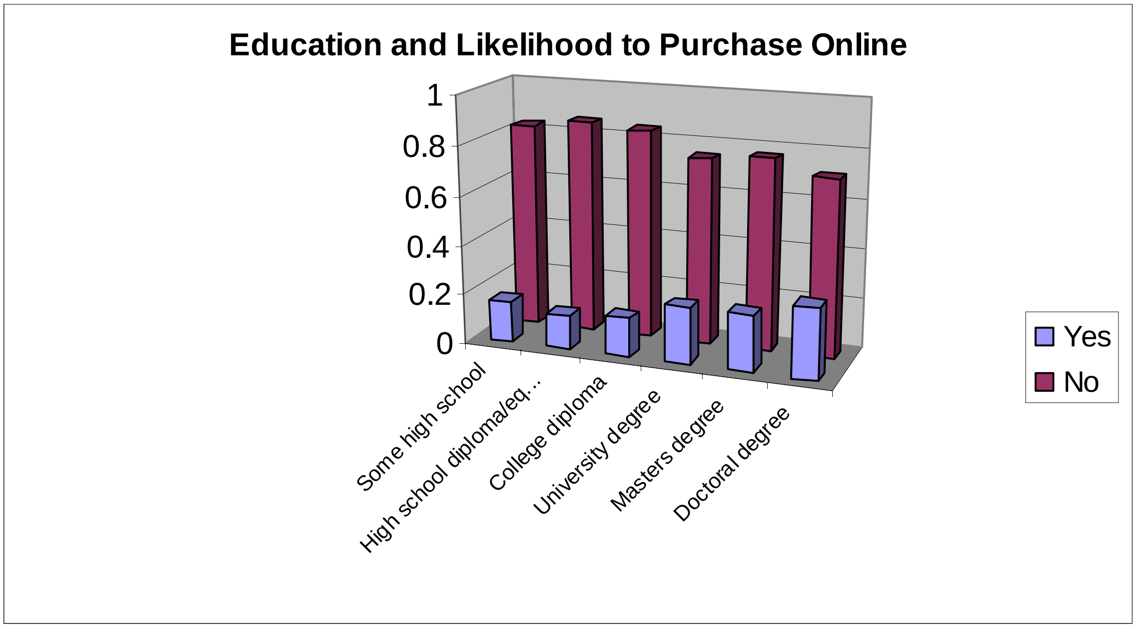
When it came to the participant's feelings about sponsored links, we generally found less resistance to clicking on paid links as education levels increased. Again, the Doctoral respondents seemed to be the exception to the rule. At the High School level, over 30% respondents indicated they wouldn't click on a link if they knew it was sponsored (and, ironically, this is the group with a fairly low awareness of what's sponsored and what's not on the results page). At the Master's level, only 20% of participants showed this same reluctance. At the Doctoral level, 28.6% of respondents said they wouldn't click on a paid link.



Education and Likelihood to Purchase Online

	Yes	No
Some high school	0.166667	0.833333
High school diploma/equivalent	0.138462	0.861538
College diploma	0.155963	0.844037
University degree	0.229358	0.752475
Masters degree	0.228571	0.771429
Doctoral degree	0.285714	0.714286

We asked if participants would purchase a wireless phone online. Again, we found the higher the education level, the greater the chance of the participant actually making an online purchase. At the High School level, only 13.8% of participants would consider making this purchase. At the Doctoral level, it was 28.6%.


Education and Likelihood to Purchase Online
1
0.8
0.6
0.4
0.2
0
Some high school
High school diploma/eq...
College diploma
University degree
Masters degree
Doctoral degree
Yes
No

Variations by Google and Non Google Users in Search Patterns

This was definitely a good news story for Google, with much higher usage, satisfaction and loyalty numbers than those found with other engines.

Google & Experience with Internet

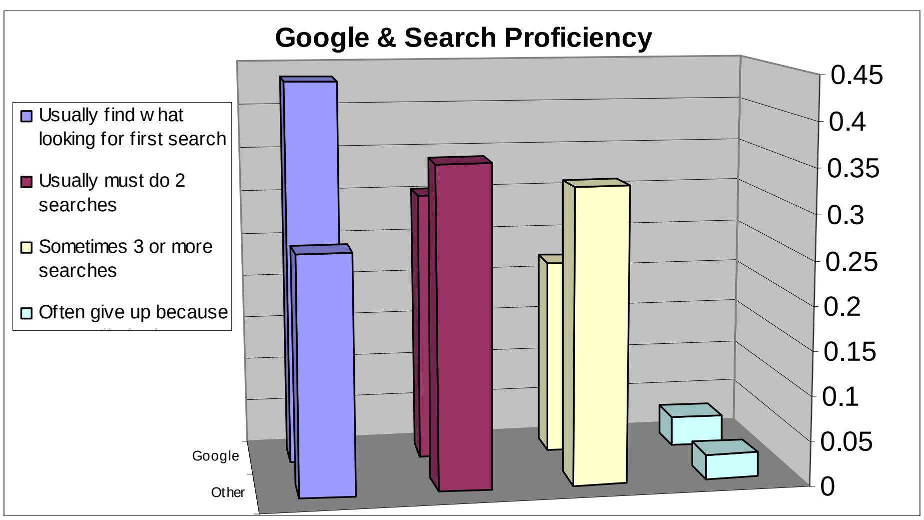
Google users tend to be more experienced Internet users, with 80% of the users indicating they have 5 or more years of experience, compared to 67% amongst users of other engines.

	<6 mos	6 mos-1 yr	1-2 yrs	2-3 yrs	3-4 yrs	4-5 yrs	5+ yrs
Google	0.01087	0	0.007246	0.036232	0.054348	0.086957	0.800725
Other	0	0.009174	0.027523	0.06422	0.100917	0.119266	0.669725

Google & Search Proficiency

We also found that Google users are much more likely to find what they're looking for in fewer searches, with 43.5% indicating they usually find what they're looking for on the first search, as compared to 26.6% with other users.

	Usually find what looking for first search	Usually must do 2 searches	Sometimes 3 or more searches	Often give up because cannot find what looking for
Google	0.434782609	0.304347826	0.221014	0.032609
Other	0.266055046	0.357798165	0.330275	0.027523

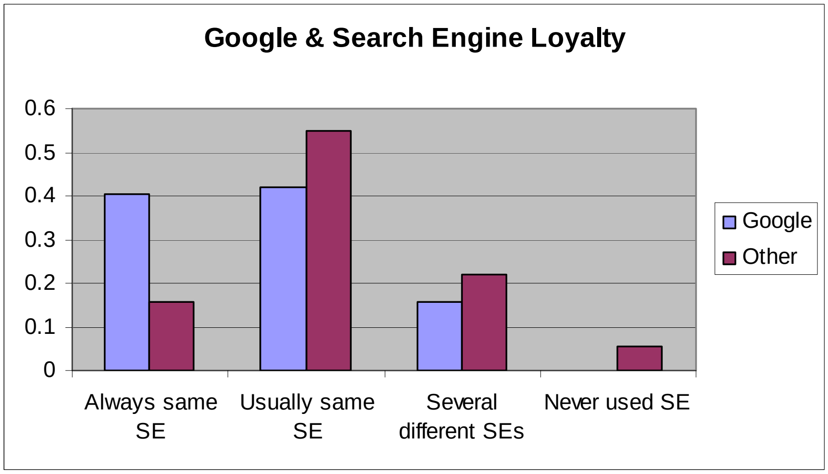


Google & Search Engine Loyalty

There was a significant difference between Google and non Google users when we looked at Search Engine Loyalty. 40.6% of Google users indicate they always use the same engine, as compared to just 15.6% amongst

	Always same SE	Usually same SE	Several different SEs
Google	0.405797	0.42029	0.155797
Other	0.155963	0.550459	0.220183

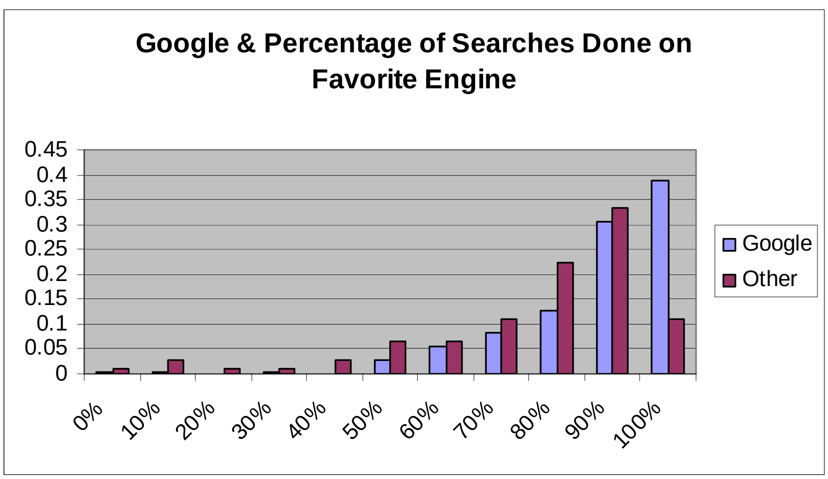
users of other engines.



Google & Percentage of Searches Done on Favorite Engine

	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
Google	0.003	0.003	0	0.003	0	0.028	0.054	0.083	0.126	0.304	0.387
Other	0.009	0.027	0.009	0.009	0.027	0.064	0.064	0.111	0.222	0.333	0.111

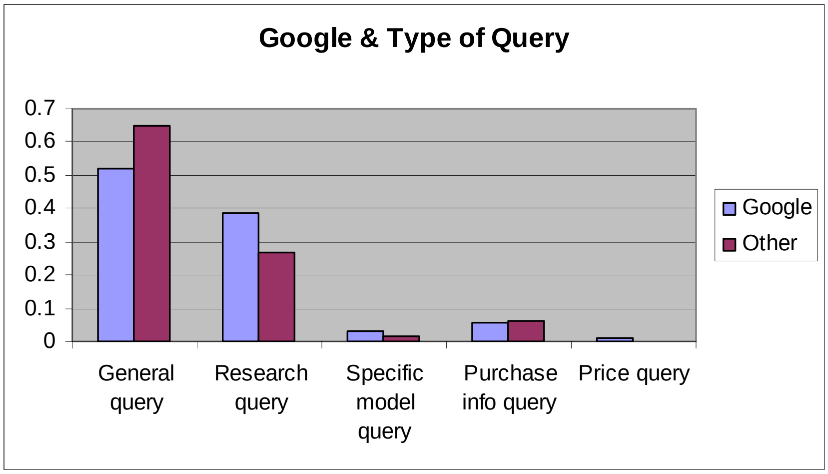
This was confirmed when we asked what percentage of searches were done on their favored engine. 38.8% of Google users indicated that Google was used for all their searches, as compared to just 11.1% amongst the users of other engines who use that engine for 100% of their searches. 81% of Google users use Google 80% or more of the time (4 out of every 5 times). This is compared to only 66% of Other Search Engine users.



Google & Nature of Query

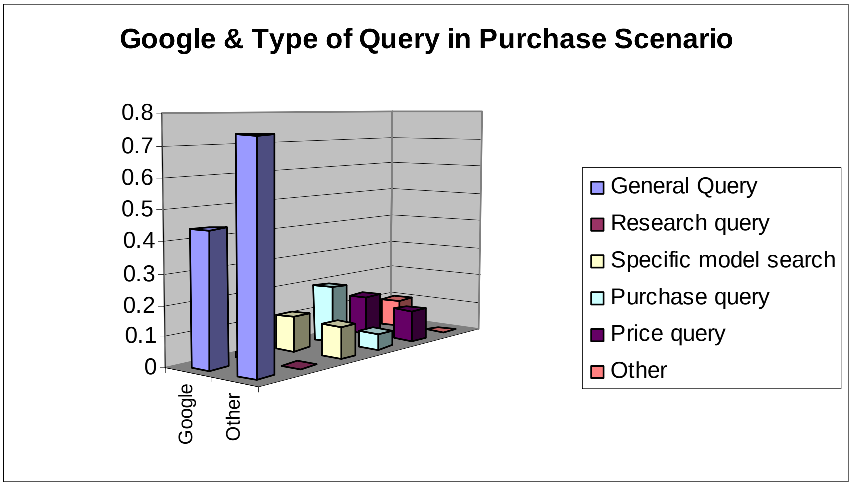
	General query	Research query	Specific model query	Purchase info query	Price query
Google	0.518072	0.385542	0.03012	0.054217	0.012048
Other	0.650794	0.269841	0.015873	0.063492	0

When doing product research using search engines, Google users were more likely to use a research query ((i.e. "microwave oven reviews" or "microwave oven comparisons") rather than a generic one (i.e. "microwaves" or "microwave ovens"). 38.5% of Google users used a research query, as compared to 30% amongst users of other engines. 65.1% of other engine users used a generic query, compared to 51.7% of Google users.



This trend continued with Google users when they were using the search engine to find a site on which to make an online purchase. In general, Google users were much more specific with the structure of their queries. Over 55% started with a relatively specific query, with only 44.2% starting with a generic query. With other engine users, only approximately 26% started with a more specific query, with almost 74% choosing to start with a generic query.

	General Query	Research query	Specific model search	Purchase query	Price query	Other
Google	0.442308	0.019231	0.115385	0.192308	0.134615	0.096154
Other	0.736842	0	0.105263	0.052632	0.105263	0

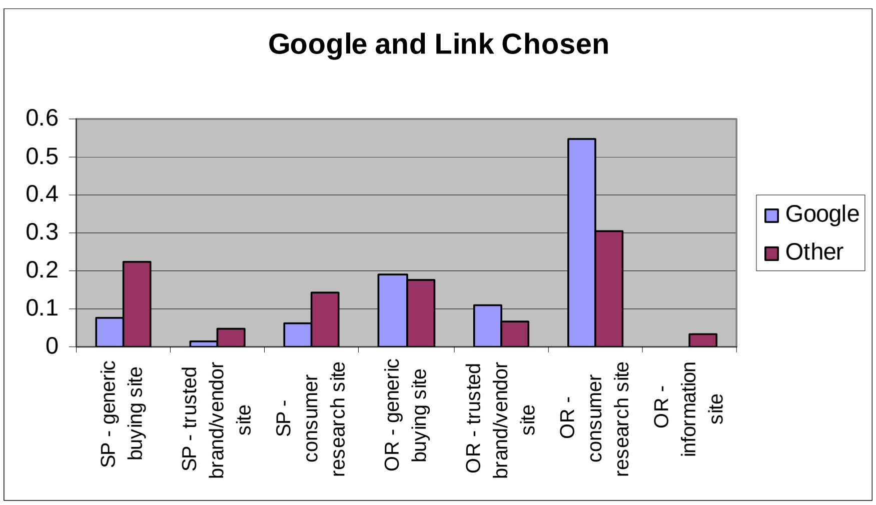


Google and Link Chosen

	SP - generic buying site	SP - trusted brand/vendor site	SP - consumer research site	OR - generic buying site	OR - trusted brand/vendor site	OR - consumer research site	OR - information site
Google	0.074534	0.012422	0.062112	0.192547	0.111801	0.546584	0
Other	0.225806	0.048387	0.145161	0.177419	0.064516	0.306452	0.032258

When we look at the results chosen, broken down by engine usage, some dramatic differences show up. Google users are much more likely to click on organic listings than users of other engines. This could be explained by some of the findings from our previous focus group, outlined in the paper "Inside the Mind of the Searcher". In that, we found that Google users tend to skip over sponsored listings for a number of reasons (for more, see Inside the Mind of the Searcher, available at www.enquiro.com/research.asp).

With the group, only 14.8% of Google Users chose a sponsored link during the product research scenario, compared to 41.8% of Other Engine Users. Google users showed a strong preference for the organic consumer research site links in the study, with 54.6% of them choosing these links, as compared to just 30.6% of Other Engine Users.

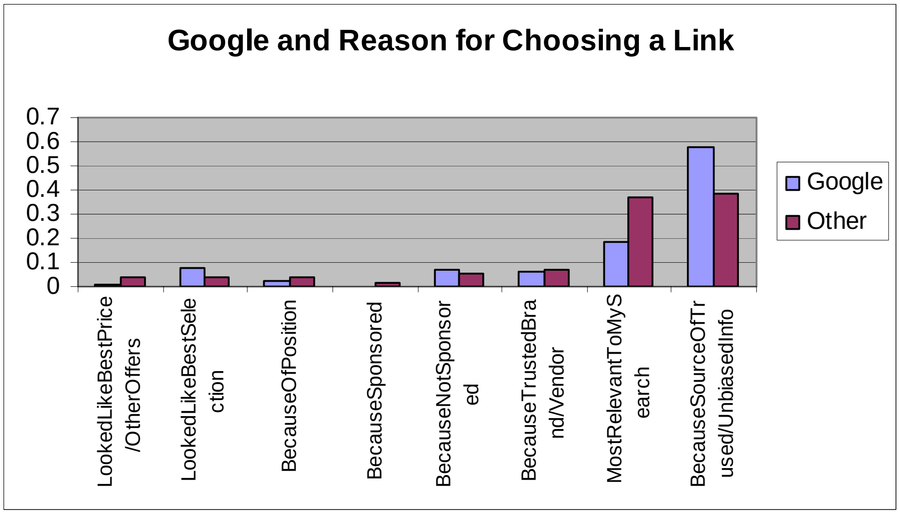


Google & Reason for Choosing a Link

This trend seemed to be continued when the reasons for choosing a link are examined. Over 57% of Google users choose a link because it looked to offer a source of trusted and unbiased information. This compares to 38.6% of other engine users. Relevance of search results was stated as a less important factor in choosing a link among Google Users compared to other engine users. Only 18.4% of Google users stated relevance as their primary reason, compared to 36.8% of other engine users. Based on Google users general level of satisfaction with their results, this could indicate that relevance is more likely to be taken for granted with Google than

	Looked Like Best Price/Other Offers	Looked Like Best Selection	Because Of Position	Because Sponsored	Because Not Sponsored	Because Trusted Brand/Vendor	Most Relevant To My Search	Because Source Of Trusted/Unbiased Info
Google	0.006369	0.076433	0.025478	0	0.070064	0.063694	0.184713	0.573248
Other	0.035088	0.035088	0.035088	0.017544	0.052632	0.070175	0.368421	0.385965

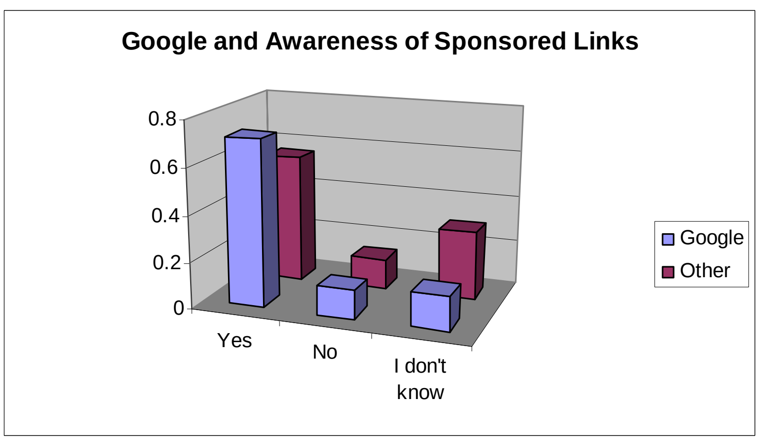
with other engines.



Google and Awareness of Sponsored Links

	Yes	No	I don't know
Google	0.719298	0.122807	0.146199
Other	0.557377	0.131148	0.295082

Perhaps these dramatic differences can be somewhat explained by the fact that Google users are much more aware than other engine users of what is a sponsored link and what is an organic link. With other engine users, when asked if sponsored links appeared on the page (5 did appear) almost 44 % either said no or they didn't know. Only 28% of Google users have the same responses.



Google and Acceptance of Sponsored Links

	No	Yes, if looked relevant
Google	0.294355	0.705645
Other	0.277228	0.70297

When looking at the number of people clicking on sponsored links in the Google group as compared to users of other engines, one might conclude that Google users are more resistant to sponsored ads. This didn't seem to be the case. We asked specifically if users would click on a sponsored link if it appeared to offer relevant information. As can be seen, the results with the two groups were almost the same.

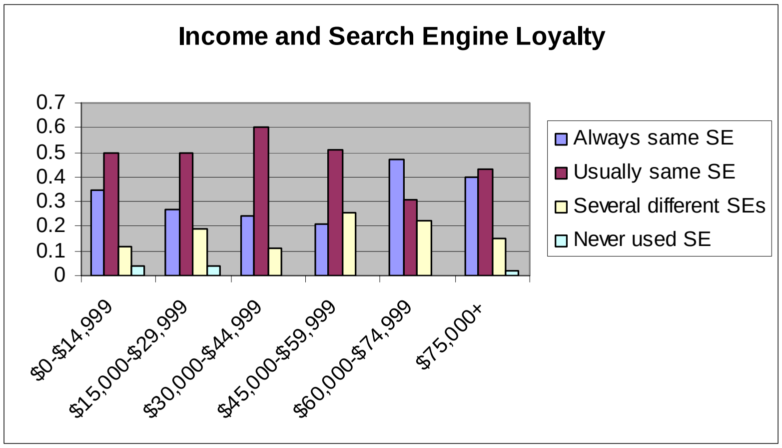
This brings up a couple of questions. If Google's layout was not as clearly delineated between sponsored and organic (or, alternatively, if the other engine's layouts became clearer) would the gap between sponsored click throughs narrow? Are a large percentage of these click throughs on the other engines due primarily to the confusion between what is sponsored and what is organic.

Income and Variances in Search Patterns

Income & Search Engine Loyalty

	Always same SE	Usually same SE	Several different SEs	Never used SE
$0-$14,999	0.346154	0.5	0.115385	0.038462
$15,000-$29,999	0.269231	0.5	0.192308	0.038462
$30,000-$44,999	0.244444	0.6	0.111111	0
$45,000-$59,999	0.209302	0.511628	0.255814	0
$60,000-$74,999	0.472222	0.305556	0.222222	0
$75,000+	0.401869	0.429907	0.149533	0.018692

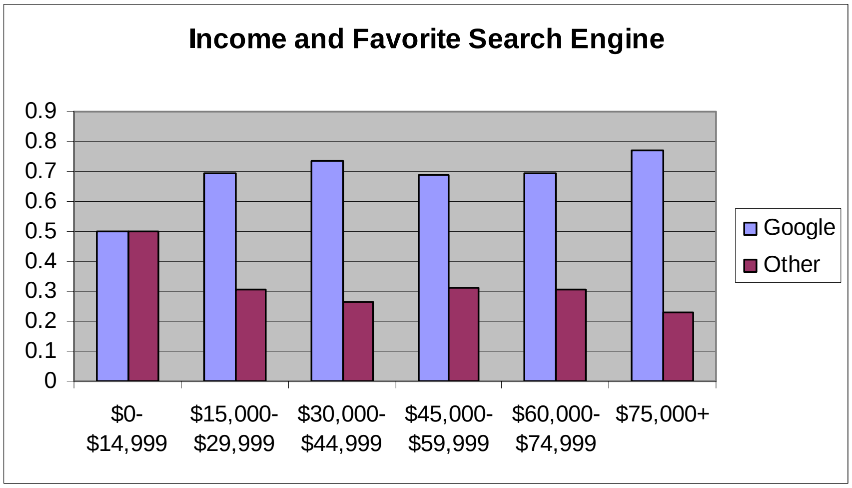
When looking at different income levels, we saw that loyalty to engines seems to start out relatively high with the low income groups (these tended to be younger people who were very comfortable with search engines and the internet), then dip through low and middle levels ($20 – $60 thousand) and rise dramatically through the upper income levels ($60 plus).



Income and Favorite Search Engine

When asked which engine was used, Google seemed to be the choice of approximately 70% of respondents, with some variations from group to group. The lowest income group was an even split, with 50% using Google and 50% using other engines. The highest income group had the highest percentage of Google users, with 77%.

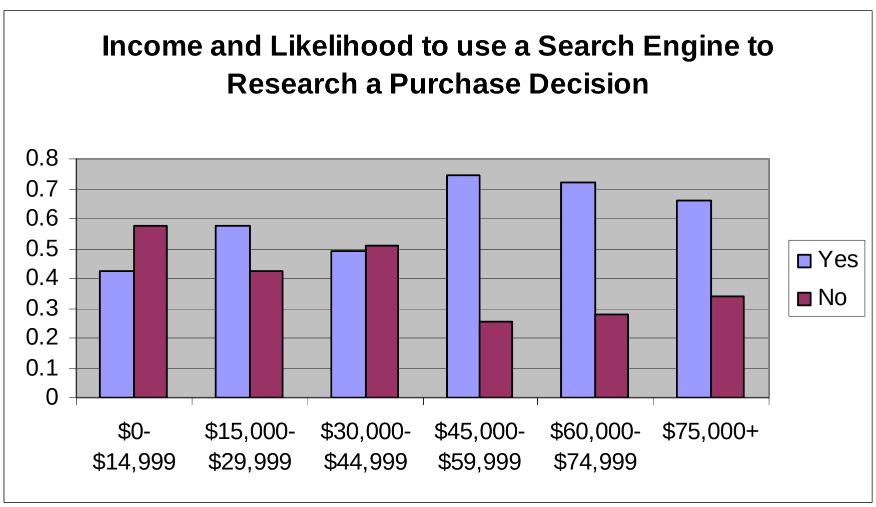
	Google	Other
$0-$14,999	0.5	0.5
$15,000-$29,999	0.692308	0.307692
$30,000-$44,999	0.733333	0.266667
$45,000-$59,999	0.690476	0.309524
$60,000-$74,999	0.694444	0.305556
$75,000+	0.771429	0.228571



Income and Likelihood to use a Search Engine to Research a Purchase Decision

Generally speaking, middle and higher income groups were more likely than low income groups to use a search engine to research a buying decision. This likelihood dropped a bit at the highest income level. There was also an increase in likelihood in the $15 to $30 thousand income level. This could be indicative of a reduced price sensitivity in the first group and increased sensitivity in the later.

	Yes	No
$0-$14,999	0.423077	0.576923
$15,000-$29,999	0.576923	0.423077
$30,000-$44,999	0.488889	0.511111
$45,000-$59,999	0.744186	0.255814
$60,000-$74,999	0.722222	0.277778
$75,000+	0.663551	0.336449



Income and Links Chosen

Some very interesting patterns emerged when we looked at the types of links chosen; broken down
by income level.

Low income – This group was more apt to chose sites that focused on price and also was more responsive to the appearance of trusted brands in listings. Interest in sites offering unbiased consumer information seems to increase with income level.

As a group, approximately 20% of participants chose sponsored links, 80% chose organic ones.

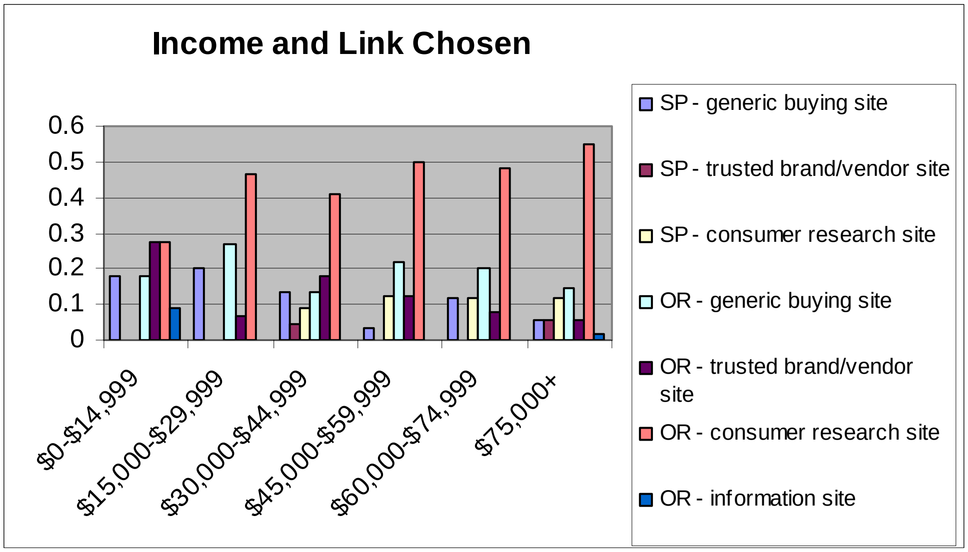
Middle income – Interest here begins to switch to the consumer information sites. Trusted brands and vendors, although still a significant factor, becomes slightly less important.

This group is a little more likely to choose sponsored results, with 21.3% of them going this route, and 78.7% choosing organic

Higher Income – Finally, this group is very interested in consumer research sites, with trusted brands playing a relatively minor role in attracting the click through.

This group was more likely to choose a sponsored link, with just under 24%, compared to slightly more than 76% choosing organic links.

	SP - generic buying site	SP - trusted brand/vendor site	SP - consumer research site	OR - generic buying site	OR - trusted brand/vendor site	OR - consumer research site	OR - information site
$0-$14,999	0.181818	0	0	0.181818	0.272727	0.272727	0.090909
$15,000-$29,999	0.2	0	0	0.266667	0.066667	0.466667	0
$30,000-$44,999	0.136364	0.045455	0.090909	0.136364	0.181818	0.409091	0
$45,000-$59,999	0.03125	0	0.125	0.21875	0.125	0.5	0
$60,000-$74,999	0.12	0	0.12	0.2	0.08	0.48	0
$75,000+	0.057971	0.057971	0.115942	0.144928	0.057971	0.550725	0.014493

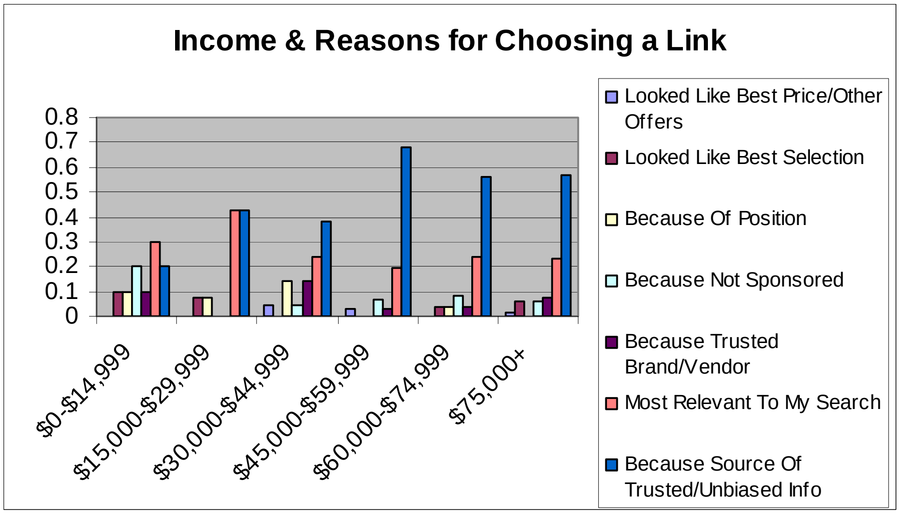


Income and Reason for Choosing a Link

When giving their reason for choosing a link in a product research scenario, it was the middle and upper income levels that were most likely to choose

	Looked Like Best Price/Other Offers	Looked Like Best Selection	Because Of Position	Because Not Sponsored	Because Trusted Brand/ Vendor	Most Relevant To My Search	Because Source Of Trusted/ Unbiased Info
$0-$14,999	0	0.1	0.1	0.2	0.1	0.3	0.2
$15,000-$29,999	0	0.071429	0.071429	0	0	0.428571	0.428571
$30,000-$44,999	0.047619	0	0.142857	0.047619	0.142857	0.238095	0.380952
$45,000-$59,999	0.032258	0	0	0.064516	0.032258	0.193548	0.677419
$60,000-$74,999	0	0.04	0.04	0.08	0.04	0.24	0.56
$75,000+	0.014286	0.057143	0	0.057143	0.071429	0.228571	0.571429

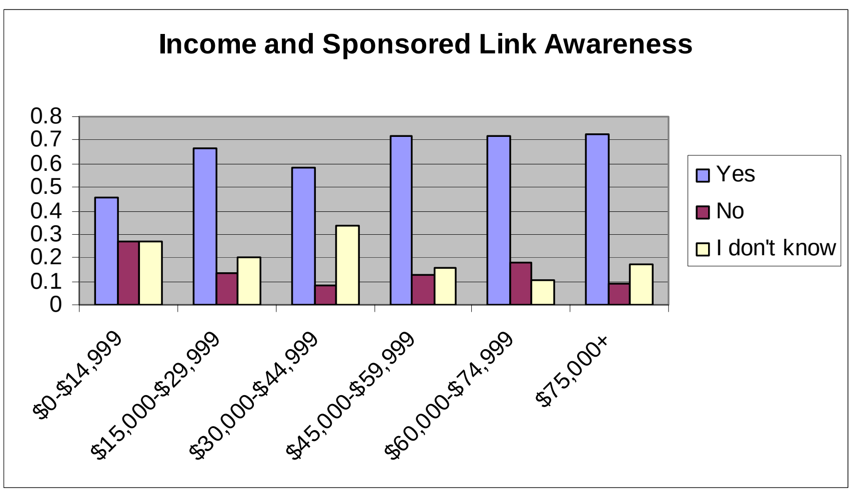
because it appeared to be a trusted source of unbiased information. This peaked at 67.7% in the $45 - $59 thousand bracket. Relevance seemed to be a more popular choice amongst lower income users, as was trusted brand names or vendors.



Income and Sponsored Link Awareness

In looking at awareness of sponsored listings, the confusion about what is sponsored seems to decrease as we move into higher income levels. At the lower levels, almost half of the users showed confusion about what was and wasn't sponsored. At higher income levels, this decreased to approximately 25 – 27%.

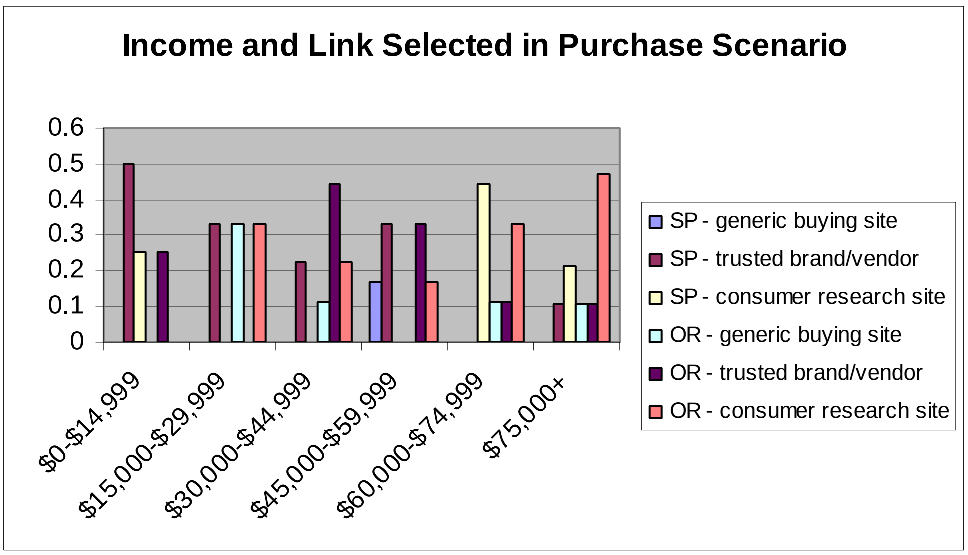
	Yes	No	I don't know
$0-$14,999	0.454545	0.272727	0.272727
$15,000-$29,999	0.666667	0.133333	0.2
$30,000-$44,999	0.583333	0.083333	0.333333
$45,000-$59,999	0.71875	0.125	0.15625
$60,000-$74,999	0.714286	0.178571	0.107143
$75,000+	0.727273	0.090909	0.168831



Income and Link Selected in Purchase Scenario

When presented with a purchase scenario, lower income groups tended to be more drawn to listings that featured trusted brands or vendors, while higher income groups were attracted by sites that feature consumer research information. While findings are presented here, the low sample size for this particular question (only participants that would buy online completed it, which dropped the sample size by over 70%) means that some of the findings could not be representative.

	SP - generic buying site	SP - trusted brand/vendor	SP - consumer research site	OR - generic buying site	OR - trusted brand/vendor	OR - consumer research site
$0-$14,999	0	0.5	0.25	0	0.25	0
$15,000-$29,999	0	0.333333	0	0.333333	0	0.333333
$30,000-$44,999	0	0.222222	0	0.111111	0.444444	0.222222
$45,000-$59,999	0.166667	0.333333	0	0	0.333333	0.166667
$60,000-$74,999	0	0	0.444444	0.111111	0.111111	0.333333
$75,000+	0	0.105263	0.210526	0.105263	0.105263	0.473684



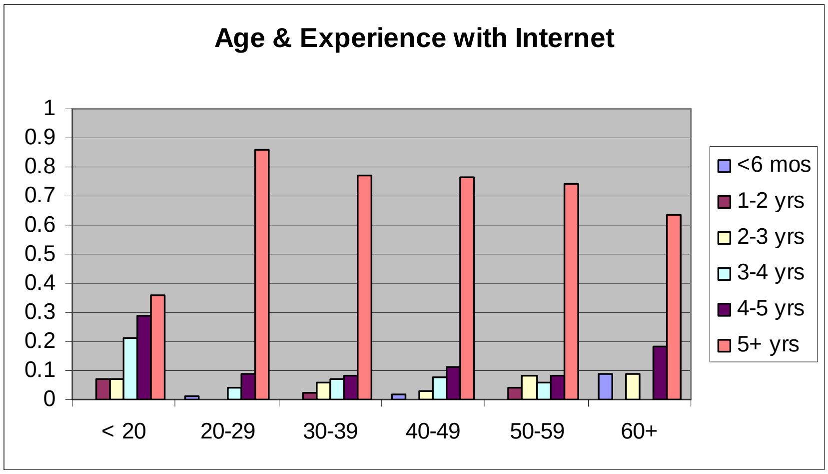
Age and Variations in Search Patterns

Age & Experience with Internet

Not surprisingly, once we went beyond the under 20 age group, the level of internet experience decreased as the average age increased. 85.9% of the 20 to 29 age group had more than 5 years experience, while only 63.6% of the 60 plus age group was this experienced. In general, we found that experience on the internet is higher in the

	<6 mos	1-2 yrs	2-3 yrs	3-4 yrs	4-5 yrs	5+ yrs
< 20	0	0.071429	0.071429	0.214286	0.285714	0.357143
20-29	0.01087	0	0	0.043478	0.086957	0.858696
30-39	0	0.022989	0.057471	0.068966	0.08046	0.770115
40-49	0.015625	0	0.03125	0.078125	0.109375	0.765625
50-59	0	0.04	0.08	0.06	0.08	0.74
60+	0.090909	0	0.090909	0	0.181818	0.636364

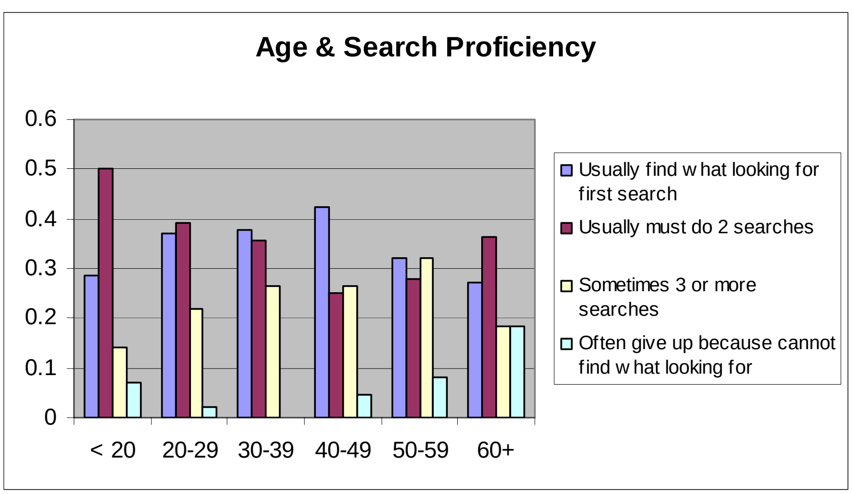
work age categories (20-59 years old) than in both the youth (less than 20) and seniors (60+ categories). This is probably associated with the use of the internet at work, providing users of work age with more opportunity to use the internet and search engines than the youth and seniors groups.



Age & Search Proficiency

When asked if they usually find what they were looking for on the first search, we found that search proficiency tends to increase with age until about age 40 to 49, then decreases as the age increases. It is seniors that seem to have the greatest difficulty with search, with a low rate of success for first search (27%) and the highest rate of 'giving up' (18%). These low rates of success for youth and seniors may be explained by the fact that these two groups have the least amount of internet experience.

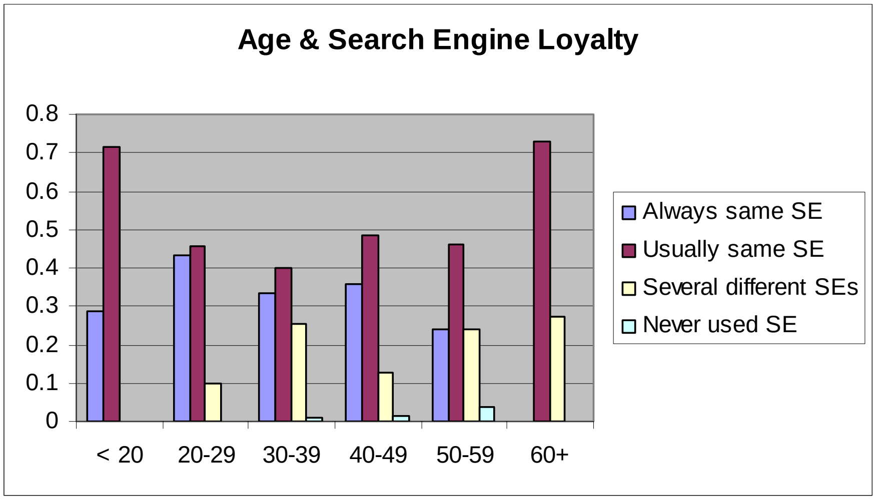
	Usually find what looking for first search	Usually must do 2 searches	Sometimes 3 or more searches	Often give up because cannot find what looking for
< 20	0.285714	0.5	0.142857	0.071429
20-29	0.369565	0.391304	0.217391	0.021739
30-39	0.37931	0.356322	0.264368	0
40-49	0.421875	0.25	0.265625	0.046875
50-59	0.32	0.28	0.32	0.08
60+	0.272727	0.363636	0.181818	0.181818



Age & Search Loyalty

Loyalty to one search engine tended to be highest in the 20 – 29 group, but remained relatively high in the 30 to 39 and 40 to 49 groups as well. Loyalty decreased rapidly in the two older age groupings.

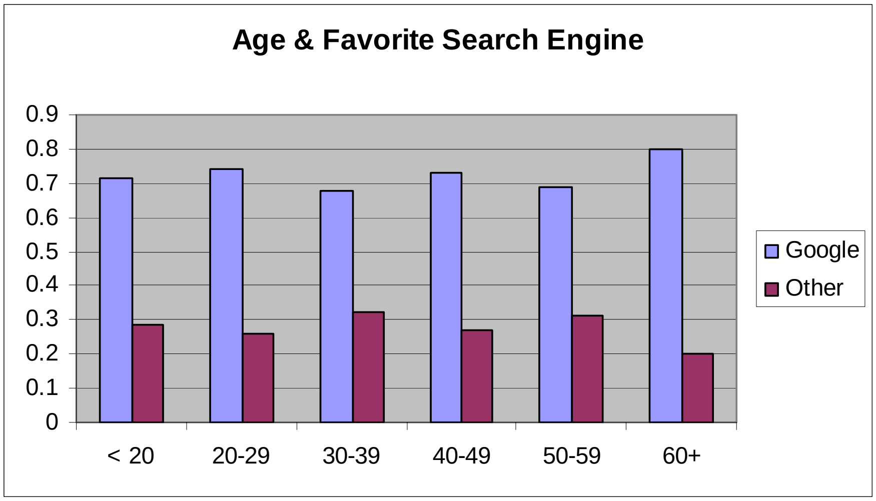
	Always same SE	Usually same SE	Several different SEs	Never used SE
< 20	0.285714	0.714286	0	0
20-29	0.434783	0.456522	0.097826	0
30-39	0.333333	0.402299	0.252874	0.011494
40-49	0.359375	0.484375	0.125	0.015625
50-59	0.24	0.46	0.24	0.04
60+	0	0.727273	0.272727	0



Age and Favorite Search Engine

	Google	Other
< 20	0.714286	0.285714
20-29	0.73913	0.26087
30-39	0.678161	0.321839
40-49	0.730159	0.269841
50-59	0.6875	0.3125
60+	0.8	0.2

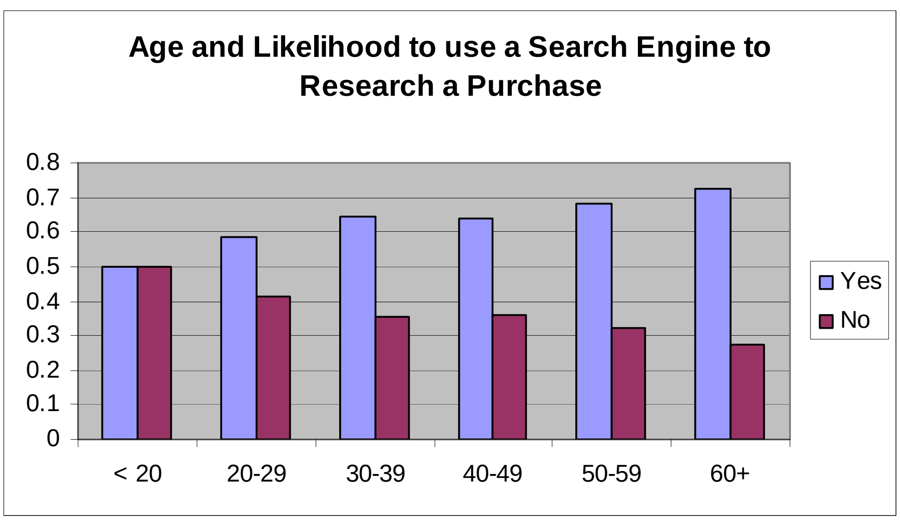
We expected to see a trend in search engine usage according to age, but this wasn't the case. High usage of Google was relatively consistent (at about 70%) and showed no specific trends. Highest Google usage was amongst the oldest group, at 80%. This was a little surprising as it goes against the idea of Google users being a little more "internet savvy" than other search engine users as the over 60 age group have the least amount of internet experience. It raises the question of how are they hearing about Google. Is it 'word of mouth' from friends and family, or are they hearing about Google in the media, for example, are they hearing the now popular phrase "getting Googled"?



Age & Likelihood to use a Search Engine to Research a Purchase

The likelihood to use a search engine to research a purchase decision increased consistently as the age increased, from a low of 50% for the under 20 group to a high of 72.7% in the 60 plus group.

	Yes	No
< 20	0.5	0.5
20-29	0.586957	0.413043
30-39	0.643678	0.356322
40-49	0.640625	0.359375
50-59	0.68	0.32
60+	0.727273	0.272727

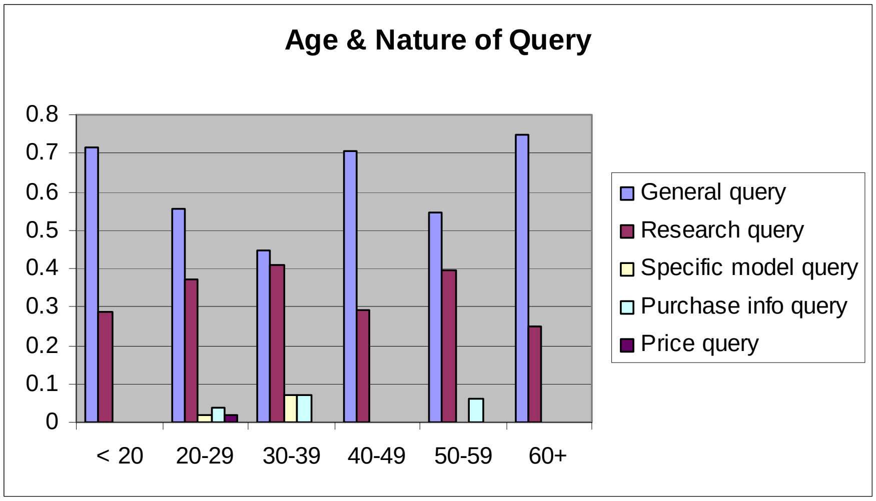


Age & Nature of Query

Groups from 20 to 40 were more likely to use research queries than the youngest and oldest groups. The 50 to 59 group also

	query	query	Specific query	Purchase query	query
30-39	0.446429	0.410714	0.071429	0.071429	0
40-49	0.707317	0.292683	0	0	0
50-59	0.545455	0.393939	0	0.060606	0
< 20	0.714286	0.285714	0	0	0
60+	0.75	0.25	0	0	0
20-29	0.555556	0.37037	0.018519	0.037037	0.018519

showed a stronger tendency to use a research based query. Under 20 year olds, 40 to 49 year olds and 60 plus participants were more likely to use generic phrases, with over 70% of these groups starting their searches this way.

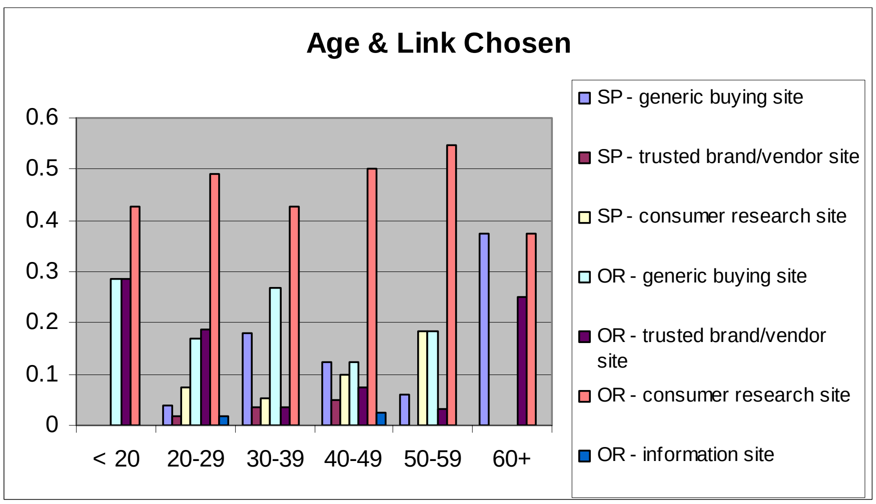


Age & Link Chosen

	SP - generic buying site	SP - trusted brand/vendor site	SP - consumer research site	OR - generic buying site	OR - trusted brand/vendor site	OR - consumer research site	OR - information site
< 20	0	0	0	0.285714	0.285714	0.428571	0
20-29	0.037736	0.018868	0.075472	0.169811	0.188679	0.490566	0.018868
30-39	0.178571	0.035714	0.053571	0.267857	0.035714	0.428571	0
40-49	0.125	0.05	0.1	0.125	0.075	0.5	0.025
50-59	0.060606	0	0.181818	0.181818	0.030303	0.545455	0
60+	0.375	0	0	0	0.25	0.375	0

When looking at results chosen in a product research based scenario, the organic consumer research links were slightly more attractive to the middle aged groups, with approximately 50% of these groups going with this option. Trusted brands and vendors were more of a factor with the youngest (under 20) and older (over 50) groups, with almost 30% choosing this category of links.

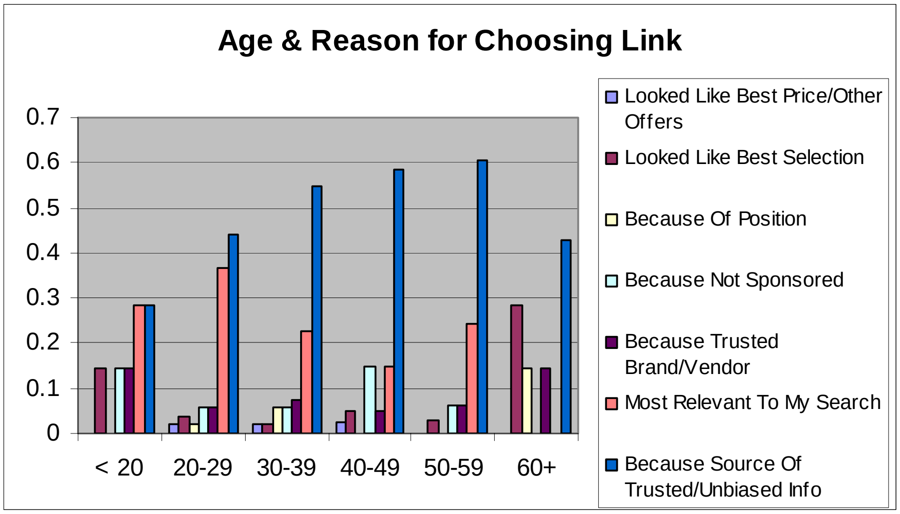
None of the under 20's chose a sponsored link, 13.2% of the 20 to 29's, 26.8% of the 30 to 39's, 27.5% of the 40 to 49's, 24.2% of the 50 to 59's, and 37.5% of the over 60's.



Age & Reason for Choosing a Link

	Looked Like Best Price/Other Offers	Looked Like Best Selection	Because Of Position	Because Not Sponsored	Because Trusted Brand/ Vendor	Most Relevant To My Search	Because Source Of Trusted/ Unbiased Info
< 20	0	0.142857	0	0.142857	0.142857	0.285714	0.285714
20-29	0.019231	0.038462	0.019231	0.057692	0.057692	0.365385	0.442308
30-39	0.018868	0.018868	0.056604	0.056604	0.075472	0.226415	0.54717
40-49	0.02439	0.04878	0	0.146341	0.04878	0.146341	0.585366
50-59	0	0.030303	0	0.060606	0.060606	0.242424	0.606061
60+	0	0.285714	0.142857	0	0.142857	0	0.428571

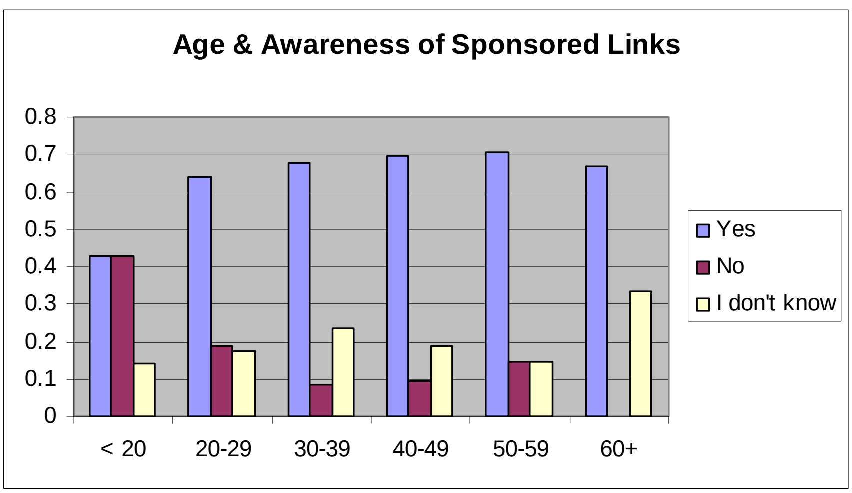
When giving reasons for choosing a link, the percentage of participants indicating that it was a source of trusted and unbiased information rose through all age groups until the 60 plus group, when it dropped significantly. Generally, relevance was given as a reason more often with younger groups. Trusted brands/vendors and selection seemed to motivate the youngest and oldest groups more than others. There was significant resistance to sponsored links in the under 20 and 40 to 49 groups, with over 14% of both groups saying they chose the link they did specifically because it wasn't sponsored.



Age & Awareness of Sponsored Links

There was significant confusion about sponsored links in the youngest group, with over 50% of them either incorrectly stating there weren't sponsored links on the results page, or saying they didn't know. This compares to 36.2% of the 20 to 29's, 32.2% in the 30 to 39's, 27.9% in the 40 to 49's, 29.4% of the 50 to 59's and 33.3% of the 60 pluses.

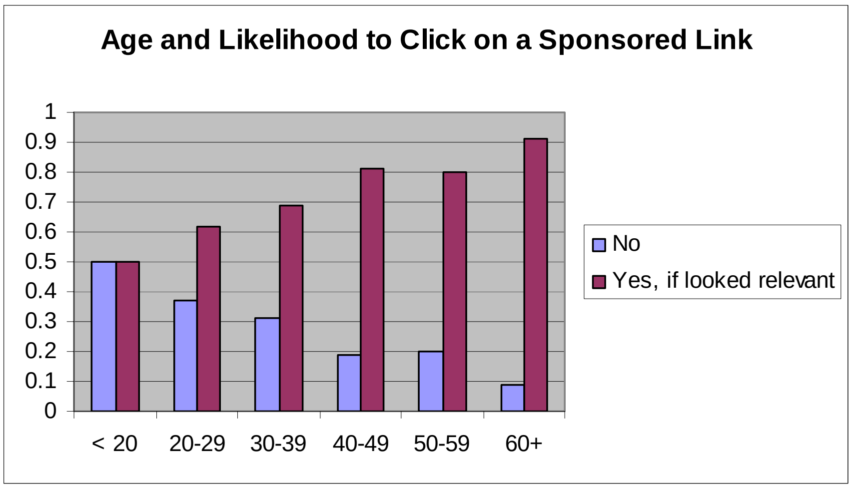
	Yes	No	I don't know
< 20	0.428571	0.428571	0.142857
20-29	0.637931	0.189655	0.172414
30-39	0.677966	0.084746	0.237288
40-49	0.697674	0.093023	0.186047
50-59	0.705882	0.147059	0.147059
60+	0.666667	0	0.333333



Age & Likelihood to Click on a Sponsored Link

In general, the likelihood of clicking on a sponsored link increased with age. Half of the under 20's indicated they wouldn't click on a sponsored link, but only 9% of the over 60 group said they had any resistance to them.

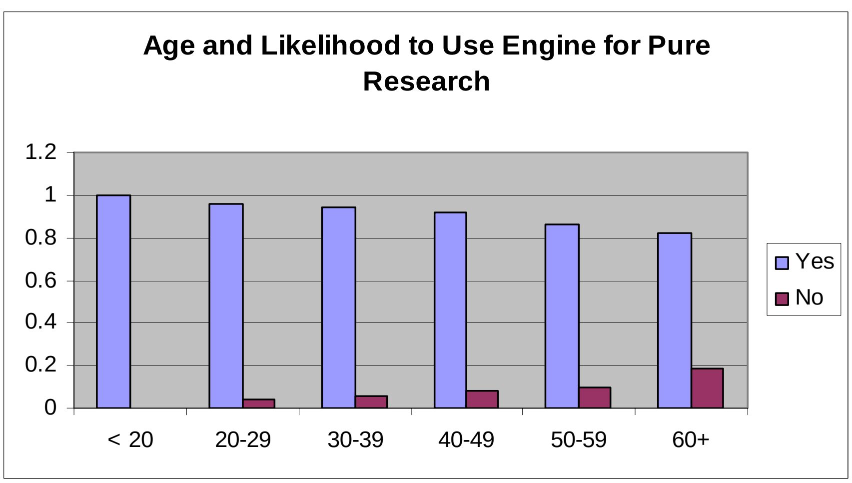
	No	Yes, if looked relevant
< 20	0.5	0.5
20-29	0.369565	0.619565
30-39	0.310345	0.689655
40-49	0.1875	0.8125
50-59	0.2	0.8
60+	0.090909	0.909091



Age & Likelihood to Use Search Engine for Research

The likelihood of using a search engine for a pure research application (in this case, looking up information for Crohn's disease) decreased consistently with age, from all of the under 20's to 81.8% of the over 60's.

	Yes	No
< 20	1	0
20-29	0.956522	0.043478
30-39	0.942529	0.057471
40-49	0.921875	0.078125
50-59	0.86	0.1
60+	0.818182	0.181818

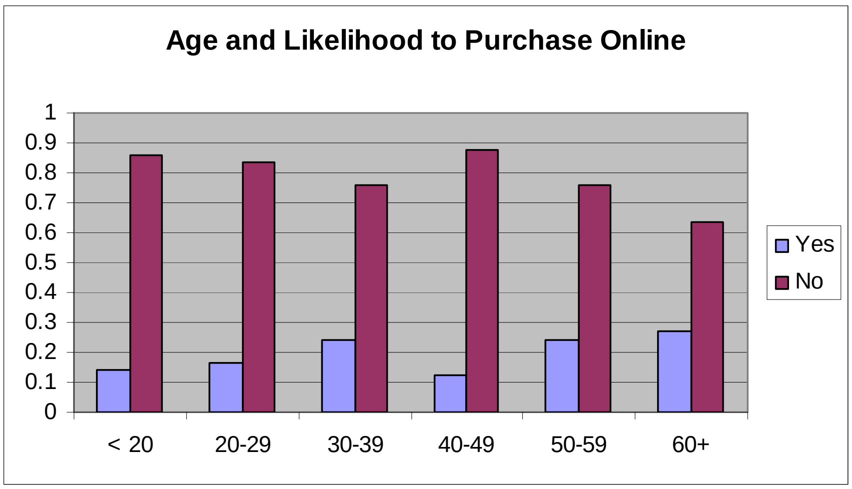


Age & Likelihood to Purchase Online

	Yes	No
< 20	0.142857	0.857143
20-29	0.163043	0.836957
30-39	0.241379	0.758621
40-49	0.125	0.875
50-59	0.24	0.76
60+	0.272727	0.636364

We asked participants if they would consider online purchases if they needed a new wireless phone. Somewhat surprisingly, we found the likelihood to purchase online actually increased with age, except for the 40 to 49 group. The 60 plus and 50 to 59 groups were the most likely to purchase online, with 27.2% and 24% respectively saying they would. Perhaps the convenience factor of online shopping was more appealing to this group.

Overall, there was a significant resistance to online purchasing in this particular instance, ranging from 87.5% of those aged 40 to 49 to 63.6% of those aged 60 plus.



Conclusions

We suspect many of the findings in this study will not come as a surprise to most search marketers. What may be enlightening is some of the numbers. For example, the clear domination of Google as the preferred engine, the variations in usage between Google and non Google users, and the preference for informative type listings.

Distinct patterns did emerge that should help marketers use search more effectively. We encourage all marketers to understand that not all searchers are alike, and there are distinctive differences in the way they interact with search engines. While some may dispute details or methodology employed in this study, we urge the reader to take what they find valid and rather than critic, enhance the body of knowledge available by search marketing by conducting and sharing their own research. This supply is woefully short and the search marketing community needs all the help they can get.

About Enquiro

Enquiro is Canada's leading search marketing company. We work with major clients throughout North America. Representatives from Enquiro, including President and CEO Gord Hotchkiss, appear regularly at industry events such as Search Engine Strategies, Ad Tech and Frost and Sullivan Marketing Summits. For more information about Enquiro, please visit our website at www.enquiro.com. You can email Gord Hotchkiss at gord.hotchkiss@enquiro.com, or contact us through our general email, info@enquiro.com.