


Keynote[®] Customer Experience Rankings[™]



Search Engine Industry Research Abstract

June 2004

Methodology Overview

The Keynote Search Engine Industry Report examines strategic issues facing the search engine industry, helping companies better understand how effective their search engines are in comparison to top competitors and providing insights into how to improve.

Keynote uses its proprietary software and a panel of thousands of Internet users to gather the quantitative, qualitative and behavioral data that inform its reports.

For this study, Keynote monitored 2,000 users as they interacted with the leading search engine websites. The study is the first to examine how the customer's online experience affects perceptions of search results and advertising, as well as search engine brands

Keynote Methodology

Keynote Customer Experience Rankings

Customer Satisfaction
Index

Brand Impact
Index

Future Usage
Index

Ad Activity
Index

Site Experience Metrics: Keynote Measures More Than 250 Metrics per Site

Customer Experience Rankings

Keynote assessed the impact of the user's experience by assessing more than 280 metrics at each leading search engine. These metrics contributed to the development of indices examining customer satisfaction, brand impact, future usage and ad conversion.

Customer Satisfaction Index

A sub-group of 80 metrics were examined to generate the Customer Satisfaction Index, a composite measure of the user's overall satisfaction with the search site.

Google also topped the Keynote Customer Satisfaction Rankings Index, establishing itself as the clear leader in terms of both customer experience and satisfaction.

A vast majority of study participants indicated that Google is their primary search engine and 89% indicated that they had a strongly positive experience with the site.

Yahoo! was the clear number-two search site with 68% of users indicating a positive experience. Google and Yahoo! held a significant lead over the other leading search engines: Ask Jeeves (50%), Lycos (48%) and MSN (41%).

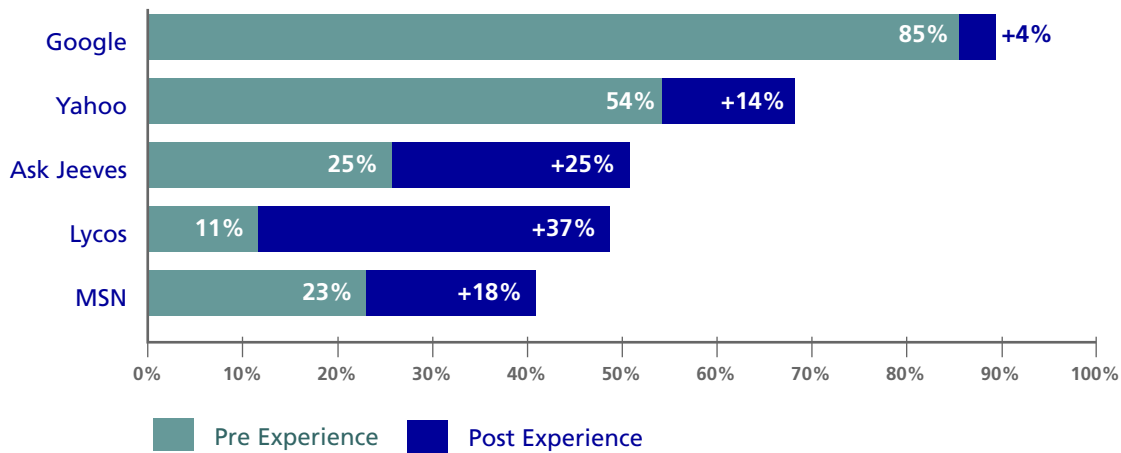
Keynote Customer Experience Rankings

Rank	Search Engine Industry Companies
1.	Google
2.	Yahoo!
3.	Ask Jeeves
4.	Lycos
5.	MSN

Customer Satisfaction Index

Rank	Search Engine Industry Companies
1.	Google
2.	Yahoo!
3.	Ask Jeeves
4.	Lycos
5.	MSN

Brand Image Pre-Search and Post-Search



Ad Activity Index

Despite its clear leadership in customer satisfaction, Google ranked at the bottom of the Keynote Ad Activity Index, which measures leading indicators of advertising success, including clickthroughs to sponsored links and time spent on the sponsored site.

Ad Activity Index

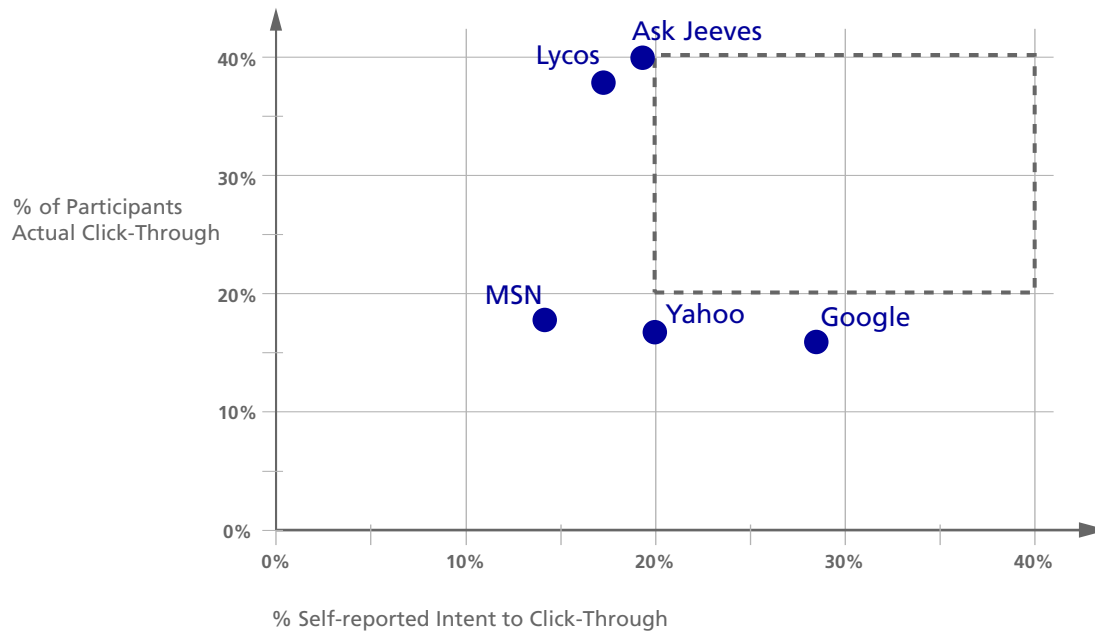
Rank	Search Engine Industry Companies
1.	Ask Jeeves
2.	Lycos
3.	MSN
4.	Yahoo
5.	Google

Ask Jeeves and Lycos led in the majority of advertising success measurements, with Ask Jeeves generating the most clickthroughs of the leading search engines and Lycos generating the greatest awareness of its sponsored links. Regardless of the search engine used, users spent an average of 45 seconds viewing a web page reached through a sponsored link.

In examining sponsored links, the study found that although users self-reported that they were more likely to click on sponsored links on Google, in practice they were more likely to click on sponsored links on Ask Jeeves and Lycos.

The study found that sponsored result usefulness and presentation were the two leading factors in determining user satisfaction with a site's advertising, as well as their likelihood to click on sponsored links on that site in the future.

Actual vs. Self-Reported Sponsored Link Clickthrough



Brand, Presentation Affect Perceived Success of Search

The study uncovered a direct correlation between brand – and presentation – to the perceived success of a search and satisfaction with that search.

Although actual search results returned by the leading five search engines do not differ substantially by some measures, Google users reported a higher perceived rate of success and satisfaction with search results.

In fact, when complex search success and result speed were objectively measured, Google did not help users achieve search success any more than any other major search engine. Yet, the perceived quality of the Google search results was higher than its competitors.

This can be attributed, in part, to the fact that Google wins praises from users for its segregation of sponsored results from search results; whereas sites such as Ask Jeeves and Lycos often frustrate users with the placement of sponsored links within the main content area.

Future Usage Index

Google and Yahoo! foster the greatest sense of loyalty among customers and generate the strongest repeat usage, according to the Keynote Search Engine Future Usage Index. Despite the strong Microsoft brand, MSN had the least loyal customers, with just 32% expressing a strong intention to return for a future search.

However, even the leaders were subject to a degree of customer erosion. When Google enthusiasts were prompted to try a competing search engine, more than 9% reported they would be open to using a competing site over Google in the future. Up to 22% of Yahoo! enthusiasts were open to using a different site.

Even though 75% of users say they have one primary search engine, when search expectations are not met up to 50% of users will turn to another search engine as an alternative. Additionally, up to 20% of users regularly use different search engines for different types of searches. Even the sites with the smallest market share sites get fairly good exposure, with up to 55% of users saying they sometimes or often use Ask Jeeves.

Google was the strongest site across all types of searches, while Lycos performed relatively better for product searches and MSN performed relatively better in local searches.

Actual Search Success vs. Self-Reported Search Satisfaction

	Google		Yahoo		Ask Jeeves		Lycos		MSN	
	Success*	Satisfied**	Success*	Satisfied**	Success*	Satisfied**	Success*	Satisfied**	Success*	Satisfied**
General Search	●								●	
Local Search	●				●					
Product Search	●								●	
Complex Search	●		●							

* Success was self-reported on all search tasks except for the Complex Search which was measured objectively with a confirming question

** Satisfied = % of users who selected 5, 6, or 7 on a 7-point satisfaction scale

● Top Success Rate ● Bottom Success Rate

Additional Findings Included in the Full Report

This abstract highlights findings from the Keynote Search Engine Industry Research Report. The full report contains hundreds of pages and includes additional information not only identifying the best and the worst search engines in certain categories, but also providing specific detail about why the sites ranked where they did. The following measurements provide additional insight for search decision makers:

Keynote Drivers

Critical insights of the study are derived from understanding why sites rank as they do. Keynote conducted a sophisticated driver analysis to determine which aspects of the site experience had the most impact on site success. The factors that have the greatest relationship to these site effectiveness indices reveal which areas of the site experience should get the most attention in order to improve critical site outcomes.

Cross-Site Segmentation

Segmentation provides insights about how certain customer profiles interact with and respond to each site in the study. Keynote compares key metrics across the largest segment division identified in the industry, such as frequency of use and connection speed.

Qualitative Analysis

Using special qualitative analysis tools, the Keynote research team analyzes participant comments to identify and compare common themes across all of the sites in the study. Since our qualitative algorithms are the same across each of the reports, these tools provide a fair and quantitative way to compare customer verbatims across reports.

Longitudinal Comparisons

The Keynote syndicated research of the search industry is conducted semi-annually and thus provides a solid base for longitudinal comparisons and benchmarking. Each iteration of the study uses a similar study design, and the analysis is based upon standard Keynote metrics, resulting in data that can be easily benchmarked and compared over time.

For each subsequent wave of search engine industry research, the Keynote research team will provide a longitudinal comparison of all sites.

About Keynote Corporation

Keynote is a leading market research firm providing critical business insight into online customer experiences, industry trends, and competitive web strategies. Keynote's unique approach to market research combines innovative technology with world-class research techniques and expert consulting services to provide insights that surpass traditional market research models. More than 250 customers including Dell, eBay, Expedia, FedEx, General Motors, Macy's, Pfizer, USA Today, and more than 21 of the Fortune 50, use Keynote.

For More Information

If you have a specific question about the information contained in the Keynote CE Rankings study, please contact us at 1-800-KEYNOTE or visit www.keynote.com.