PEW / INTERNET
PEW INTERNET & AMERICAN LIFE PROJECT

comScore Media Metrix

Data Memo

BY: Pew Internet Project Director Lee Rainie (202-419-4500)
comScore Communications Analyst Jeremy Shermak (312-775-6520)
RE: Search Engine use November 2005

Search engine use shoots up in the past year and edges towards email as the primary internet application

On an average day, nearly 60 million people use search engines

Search engines have become an increasingly important part of the online experience of American internet users. The most recent findings from Pew Internet & American Life tracking surveys and consumer behavior trends from the comScore Media Metrix consumer panel show that about 60 million American adults are using search engines on a typical day.

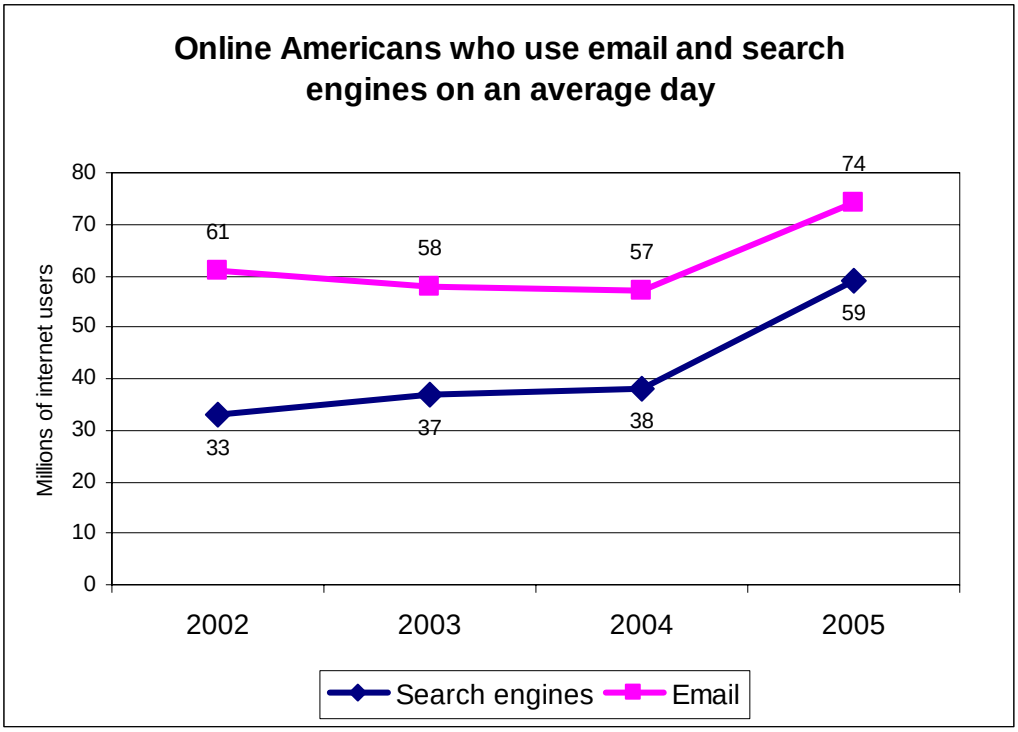
These results from September 2005 represent a sharp increase from mid-2004. Pew Internet Project data from June 2004 show that use of search engines on a typical day has risen from 30% to 41% of the internet-using population, which itself has grown in the past year. This means that the number of those using search engines on an average day jumped from roughly 38 million in June 2004 to about 59 million in September 2005 – an increase of about 55%. comScore data, which are derived from a different methodology, show that from September 2004 to September 2005 the average daily use of search engines jumped from 49.3 million users to 60.7 million users – an increase of 23%.

This means that the use of search engines is edging up on email as a primary internet activity on any given day. The Pew Internet Project data show that on a typical day, email use is still the top internet activity. On any given day, about 52% of American internet users are sending and receiving email, up from 45% in June of 2004.

comScore data show that, compared to the amount of time people use search engines, the time users' spend sending and receiving email on web-based clients such as Hotmail and Yahoo! Mail is still considerably higher. On an average day, internet users on the comScore panel spent more than 24 minutes on email, compared to 3.5 minutes for search engines. This is not surprising, given the average time of a search compared with the average time of reading and writing email. At the same time, it does show that email

continues to be a powerful application that commands a notable amount of users' time online on any given day.

Overall, among internet users, there is hardly a difference between the size of the email-using population and the size of the search-engine using population. Pew Internet Project data show that 91% of all internet users had ever sent or receive email 90% of internet users had used search engines.



1 *Source: Pew Internet & American Life Project surveys in September 2005, June 2004, June 2003, and January 2002.*

The latest data from comScore show that Google was the most heavily used search engine in October 2005 with 89.8 million unique visitors, followed by Yahoo! Search (68 million unique visitors), MSN Search (49.7 million unique visitors), Ask Jeeves (43.7 million unique visitors), and AOL Search (36.1 million unique visitors).

Top Ten Search Sites By Unique Visitors October 2005 Source: comScore Media Metrix	Unique Visitors (000)
Google Web Search	75,281
Yahoo! Search	68,031
MSN Search	49,748
Ask Jeeves	43,705
AOL Search	36,092
Yahoo! Local Search	20,270
MySpace Search	8,083
Infospace Web Search	5,942
LookSmart	4,402
Lycos Network Search	5,249

2 *Source: comScore Media Metrix qSearch data, October 2005.*

One of the trends comScore data have captured in recent months is the rise of local searches – that is, searches related to geographically distinct places. These searches involve "local qualifiers" – or search terms including specific items such as ZIP codes, telephone numbers and street addresses. Consumers are using local search tools to coincide with other online activity, such as job searches, retail shopping and travel planning.

Local Search Data

	Local Searches	Share of Local Searches
Total Internet	**447,829,790**	**100.0%**
Google Sites	195,790,534	43.7%
Yahoo! Sites	126,243,837	28.2%
MSN-Microsoft Sites	61,548,838	13.7%
Time Warner Network	33,556,682	7.5%
Ask Jeeves	24,717,632	5.5%
InfoSpace Network	4,188,728	0.9%
Lycos, Inc.	1,373,255	0.3%

3 *Source: comScore Media Metrix qSearch data, August 2005*

Another way to look at location-specific search is to examine searches at Internet Yellow Pages (IYP) sites. IYP sites enable searchers to add additional qualifiers to their searches, such as location information or type of business, thereby enabling the IYP sites to return very specific results.

Top Sites - Internet Yellow Pages (IYP) Search Data**

	IYP Searches	Share of IYP Searches
Total Internet	**231,678,352**	**100.0%**
Yahoo! Sites	63,924,135	27.6%
Verizon Communications Corporation	59,137,830	25.5%
Google Sites	26,949,585	11.6%
YellowPages.com	17,851,651	7.7%
Time Warner Network	17,535,895	7.6%
InfoSpace Network	16,172,698	7.0%
DexOnline.com	11,526,004	5.0%
SBC Communications	5,614,062	2.4%
Citysearch	5,496,595	2.4%
Yell Limited	3,706,374	1.6%
BellSouth	3,167,013	1.4%
Ask Jeeves	361,266	0.2%

4 *Source: comScore Media Metrix qSearch data, August 2005*
***IYP searches refer to searches at directory sites that include multiple qualifiers such as address or type of business.*

To put email use and search-engine use in perspective, the table below compares these activities to other internet activities. The use of email is the top internet activity tracked in Pew Internet Project work. Search engine use is the second. And newsgathering is the third. The remaining activities are a scattering of other activities that are regularly queried in Project surveys and are included as examples of where search engine use stacks up in comparison with other well-known internet activities.

On an average day, about 94 million American adults use the internet. Here is the proportion of that daily population who are doing some well-known internet activities

Email	77%
Search engine	63%
Get news*	46%
Do job-related research*	29%
Use instant messaging	18%
Do online banking*	18%
Take part in chat room	8%
Make a travel reservation	5%
Read blogs	3%
Participate in online auction*	3%

5 *Source: Pew Internet & American Life Project. September 2005 tracking survey. N=1,577. Margin of error plus or minus 3%.*
** Data from PIP tracking survey Feb. 21-March 21, 2005. N=1,382. MOE is plus or minus 3%.*

The Pew Internet Project findings cited in this report come from a nationally representative telephone survey of 2,251 American adults (age 18 and older), including

1,577 internet users, between September 13-October 14, 2005. The margin of error on the internet user portion of the survey is plus or minus 3%.

The comScore data cited in this report come from comScore Media Metrix, an internet audience measurement service that uses a massive cross-section of more than 1.5 million U.S. consumers who have given comScore explicit permission to confidentially capture their browsing and transaction behavior, including online and offline purchasing.

Further analysis

Those who use search engines on an average day tend to be heavy internet users. They are much more likely to have broadband connections than dial-up connections; to log on to the internet several times a day; and to have spent considerable time online during the day.

Those using search engines on a typical day are also more likely to be in their 30s – members of the GenX cohort – than any other generational cohort.

They are also more likely to be socially upscale – with college degrees and living in households earning more than $75,000. Finally, they are also more likely to be white or English-speaking Hispanics than to be African-American.

Here are some of the details:

Broadband
On an average day, 41% of online Americans use search engines. These are the percentages of internet users with various kinds of connections who use search engines on an average day:

Broadband at home	54%
Broadband at work	57%
Broadband at home and work	70%
Dial-up at home	33%

Generational cohort
On a typical day these are the percentages of internet users in each generation who use search engines:

GenY (ages 18-28)	42%
GenX (ages 29-40)	51%
Younger Baby Boomers (ages 41-50)	37%
Older Baby Boomers (ages 51-59)	39%
Matures (ages 60-69)	31%
After work (ages 70+)	25%

Race and ethnicity

On a typical day these are the percentages of internet users in each group who use search engines:

White	43%
English-speaking Hispanic	40%
African-American	23%

Income level

On a typical day these are the percentages of internet users in each group who use search engines:

Living in households earning less than $30,000	29%
Households earning $30,000-$49,999	37%
Households earning $50,000-$74,999	47%
Households earning $75,000+	52%

Educational attainment

On a typical day these are the percentages of internet users in each group who use search engines:

Less than high school diploma	27%
High school diploma	31%
Some college	40%
College or graduate degree	55%

Pew Internet Project Questions

September 2005 Daily Tracking Survey

Final Topline 11/10/05

Data for September 14 – October 13, 2005

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

Sample: *n* = 2,251 adults 18 and older
Interviewing dates: 09.14.05 – 10.13.05
Margin of error is plus or minus 2 percentage points for results based on the full sample [n=2,251]
Margin of error is plus or minus 3 percentage points for results based on internet users [n=1,577]

Please tell me if you ever use the internet to do any of the following things. Do you ever use the internet to…/Did you happen to do this **yesterday**, or not?[1]

Based on internet users [N=1,577]

	TOTAL HAVE EVER DONE THIS	DID YESTERDAY	HAVE NOT DONE THIS	DON'T KNOW/ REFUSED
Send or read e-mail				
Current	91	52	9	*
February 2005	91	52	9	*
January 2005	90	49	9	*
November 23-30, 2004	92	48	8	*
November 2004	93	54	7	*
May/June 2004	93	45	7	*
February 2004	91	48	8	*
Nov 2003	91	48	8	*
June 2003	91	49	9	*
April/May 2003	93	52	7	*
March 20-25, 2003	94	50	6	*
March 12-19, 2003	91	52	9	0
March 3-11, 2003	94	54	6	*
February 2003	91	50	9	*
Dec 2002	93	49	7	0
Nov 2002	94	51	6	*
Oct 2002	93	50	7	0
Sept 2002	93	51	7	*
July, 2002	93	46	7	*
March/May 2002	93	50	7	*
Jan 2002	95	52	5	0
Dec 17-23, 2001	95	54	5	*
Nov 19-Dec 16, 2001	95	53	5	*
Oct 19-Nov 18, 2001	94	52	6	*
Oct 8-18, 2001	95	44	5	*

[1] Prior to January 2005, question wording was "Please tell me if you ever do any of the following when you go online. Do you ever...?/Did you happen to do this yesterday, or not?"

Oct 2-7, 2001	92	46	7	*
Sept 20-Oct 1, 2001	94	49	6	0
Sept 12-19, 2001	93	42	7	*
Aug 2001	93	52	7	*
Feb 2001	93	53	7	*
Fall 2000	92	49	8	*
July-August 2000	93	43	7	*
May-June 2000	92	44	8	*
April 2000	92	50	8	0
March 2000	91	52	9	0

Use an online search engine to help you find information on the Web	TOTAL HAVE EVER DONE THIS	DID YESTERDAY	HAVE NOT DONE THIS	DON'T KNOW/ REFUSED
Current	90	41	9	*
May/June 2004	84	30	16	*
June 2003	89	31	10	1
Jan 2002	85	29	14	1

Methodology for the Pew Internet Project survey

This report is based on the findings of a daily tracking survey on Americans' use of the internet. The results in this report are based on data from telephone interviews conducted by Princeton Survey Research Associates International between September 14 to October 13, 2005, among a sample of 2,251 adults, 18 and older. For results based on the total sample, one can say with 95% confidence that the error attributable to sampling and other random effects is plus or minus 2.3 percentage points. For results based Internet users (n=1,577), the margin of sampling error is plus or minus 2.7 percentage points. In addition to sampling error, question wording and practical difficulties in conducting telephone surveys may introduce some error or bias into the findings of opinion polls.

The sample for this survey is a random digit sample of telephone numbers selected from telephone exchanges in the continental United States. The random digit aspect of the sample is used to avoid "listing" bias and provides representation of both listed and unlisted numbers (including not-yet-listed numbers). The design of the sample achieves this representation by random generation of the last two digits of telephone numbers selected on the basis of their area code, telephone exchange, and bank number.

New sample was released daily and was kept in the field for at least five days. The sample was released in replicates, which are representative subsamples of the larger population. This ensures that complete call procedures were followed for the entire sample. At least 10 attempts were made to complete an interview at sampled households. The calls were staggered over times of day and days of the week to maximize the chances of making contact with a potential respondent. Each household received at least one daytime call in an attempt to find someone at home. In each contacted household,

interviewers asked to speak with the youngest male currently at home. If no male was available, interviewers asked to speak with the oldest female at home. This systematic respondent selection technique has been shown to produce samples that closely mirror the population in terms of age and gender. All interviews completed on any given day were considered to be the final sample for that day. The final response rate was 30.4%.

Non-response in telephone interviews produces some known biases in survey-derived estimates because participation tends to vary for different subgroups of the population, and these subgroups are likely to vary also on questions of substantive interest. In order to compensate for these known biases, the sample data are weighted in analysis. The demographic weighting parameters are derived from a special analysis of the most recently available Census Bureau's Annual Social and Economic Supplement (March 2004). This analysis produces population parameters for the demographic characteristics of adults age 18 or older, living in households that contain a telephone. These parameters are then compared with the sample characteristics to construct sample weights. The weights are derived using an iterative technique that simultaneously balances the distribution of all weighting parameters.