

## **Exhibit F**



# HOW AMERICA SEARCHES

JUNE 2005

**icrossing** /::/

Survey conducted by Harris Interactive®  
Commissioned by icrossing, inc.



TABLE OF CONTENTS

PAGE

I.	Introduction.....	1
II.	What Are People Doing Online?.....	1
III.	Why Are People Searching and What Engines Do They Use?.....	2
IV.	What Is the Difference Between Natural and Paid Search Listings, Anyway?.....	9
V.	Who Cares What the Difference Is Between All the Listings? .....	12
VI.	They Know about Search Engines, But Who Are 'They?' .....	14



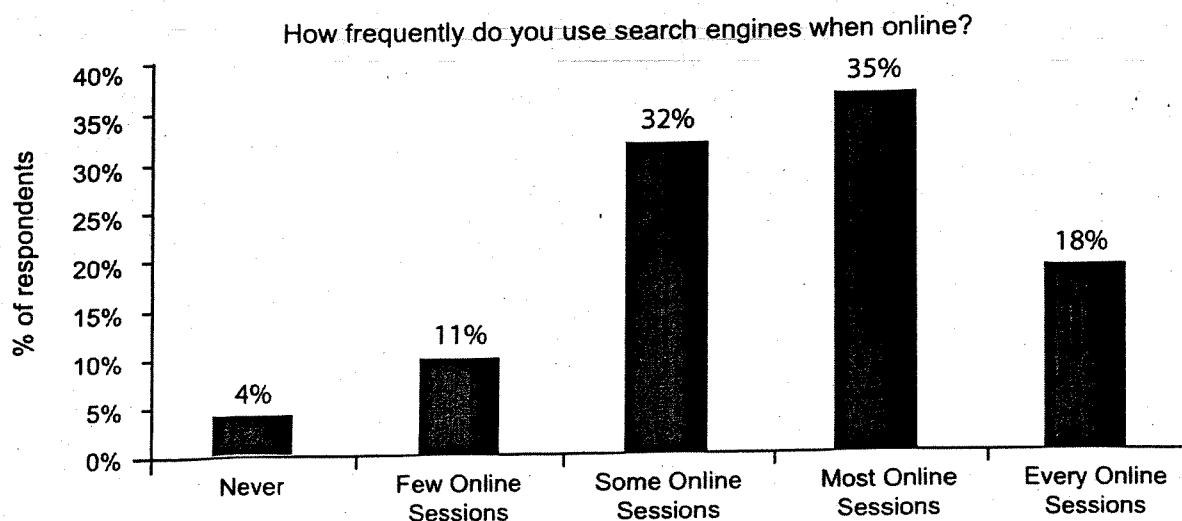
## I. INTRODUCTION

The internet is an integral part of global communication and commerce, and search has quickly staked its claim as the primary online arena for individuals and businesses to connect. Search engine marketing agency icrossing commissioned Harris Interactive® to survey U.S. adults online in April 2005 to learn more about how they use search and what they know about the medium.

The results of the study revealed that internet users have some interesting habits when it comes to searching online. Furthermore, there are a number of search engines, and most people use them. Are those who are online more during a week more sophisticated internet users? The answers may surprise you.

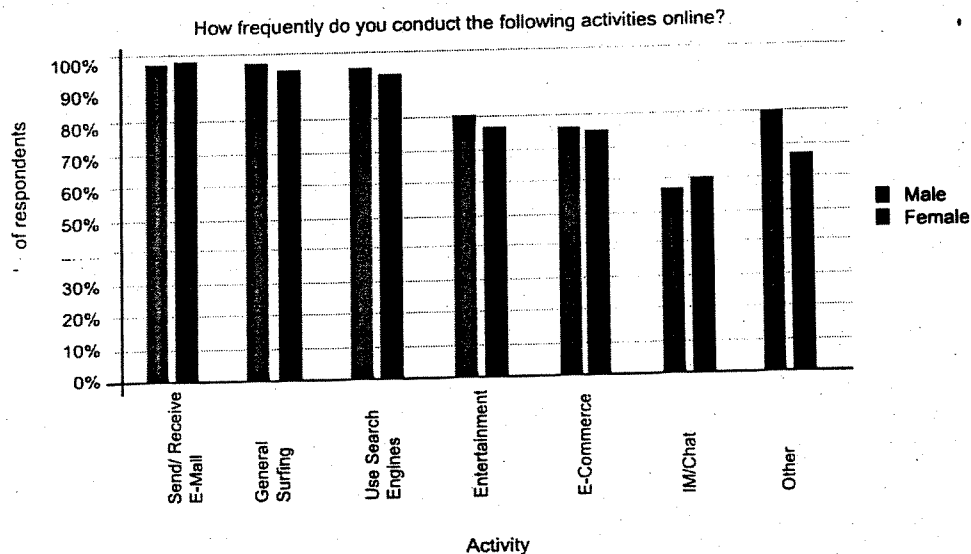
## II. WHAT ARE PEOPLE DOING ONLINE?

Not surprisingly, most online adults (87%) send e-mail most/every time they're online. Over half (55%) surf the net with no specific motive in mind most/every online session. And of course, over half (53%) search.



Weighted Base: U.S. adults and who are online (n=2,139)

Among online adults overall (2,139), women appear slightly more involved in utilizing the internet for communication (e-mail and IM/chat) than their male counterparts, but there are no significant differences between the genders except for "other," which skews to males. This could be due to the absence from the list of response choices of a major category such as sports (or adult entertainment) that tends to skew toward this gender.

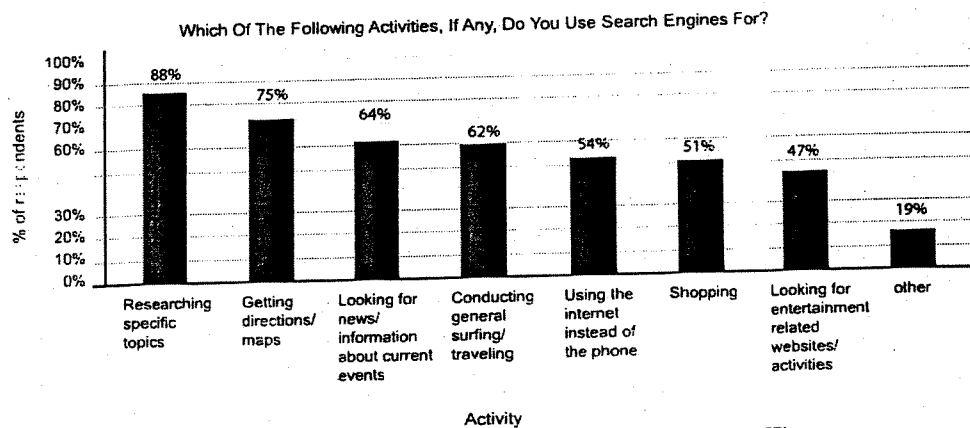


Weighted Base: Online adults in the U.S. who conduct the select activities  
(n=2,139)

### III. WHAT ARE PEOPLE SEARCHING FOR AND WHAT ENGINES DO THEY USE?

To learn why people use search engines, the poll presented respondents with the following options: researching specific topics; getting maps or directions; looking for news or current events; using it instead of a phone book; shopping; looking for entertainment sites or activities; or as another means of general surfing.

Usually when online adults who use search engines search the internet, they are doing so with a specific topic in mind, followed by a desire to know where they are going (getting maps and directions). Well over half of online adults who use search engines conduct searches that revolve around news and current events, while nearly two-thirds of searchers are looking for nothing too specific ("general surfing or trawling"). Surprisingly, less than half of search engine users are looking for entertainment as only 47% indicated this is one of the categories they search.



Weighted Base: Online adults in the U.S. who use search engines (n=2,057)





HOW AMERICA SEARCHES  
June 2005

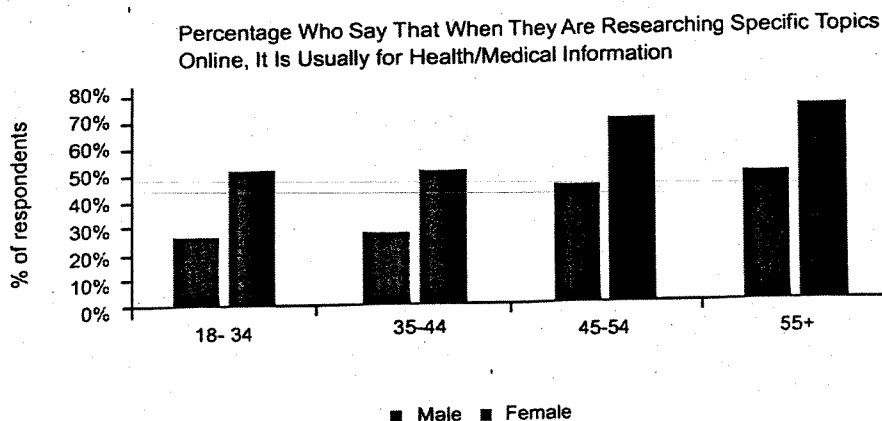
## WHAT ARE THEY RESEARCHING?

### Hobbies

Most of us researching specific topics online use search to research our hobbies. Men are slightly more inclined to use the search medium to find more about their hobbies (64%) than women (55%) but in general, this is the most popular online search activity when specific topics are involved.

### Health/Medical

Women who use search engines to research specific topics are much more likely than their male counterparts to search for health or medical information. Among those who use search engines to research specific topics, 61% of women use search for medical information compared to a surprisingly low 35% of men. There is a positive correlation between the age of women and men and their use of search for this topic.



Weighted Base: Online adults in the U.S. who use search engines to research specific topics (n=1,818)

### Career/Job Search

Surprisingly few who indicate they use search engines to research a specific topic are searching for jobs or career-related sites – only 28% of those who search specific topics. Women in this subset between the ages of 18 and 34 are the heaviest searchers for online career information followed by their same-aged male counterparts (41% vs. 36%, respectively). It is also interesting to note that those aged 35 to 44 are the least likely to use this additional information source (excluding those over 55 who may be nearing or are in retirement).

## WHAT ENGINES DO THEY USE TO RESEARCH?

Looking at the breakout according to search engine used, the study determined that AOL, Ask Jeeves, Google and Yahoo! users are strong hobby searchers. For Ask Jeeves users and MSN users, searching for medical and health information is the most popular reason for researching a specific topic. In fact, 88% of those who use Ask Jeeves for at least 33% of their searches look to search engines for maps and directions<sup>1</sup>. This could be due how the engine originally promoted itself as a question-response result system. Also of note is 71% of Google users look for news and/or current events on search engines, which could be attributed to Google's heavy push of its News Search function.

<sup>1</sup> Very small weighted base (n=64)

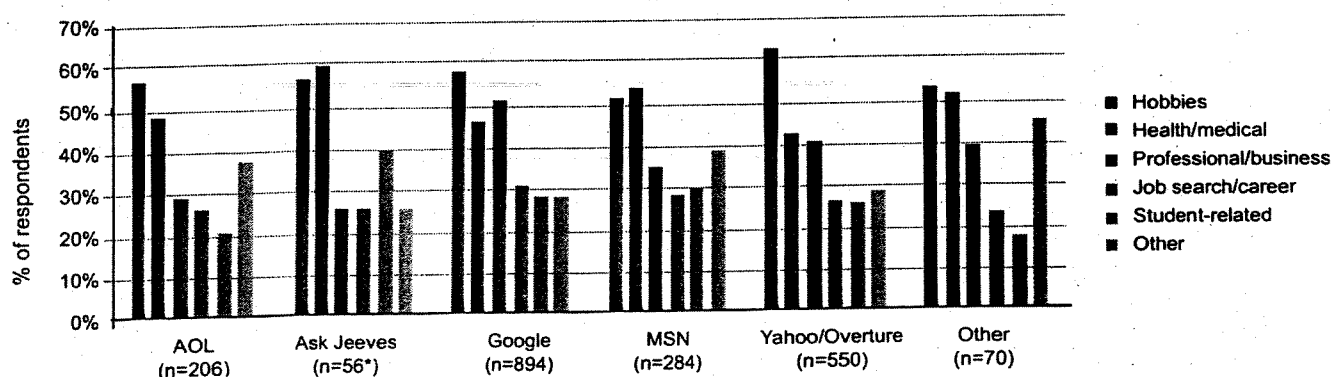


## HOW AMERICA SEARCHES

June 2005

Google users also tend to use search for business or professional research more so than other search engine users.

When I Am Researching Specific Topics Online, It Is Usually For...



Search Engine

Weighted Base: Online adults in the U.S. who use search engines to research specific topics online (n=1,818); \*note very small base

## THEY LIKE TO KNOW WHERE THEY'RE GOING... AND HOW TO GET THERE

Nearly all online adults who use search to get directions are specifically turning to search engines for driving directions (84%). Keeping with gender-stereotypes, women are more likely to "ask" for driving directions than men (87% versus 81%).

## WHAT'S THE NEWS ABOUT NEWS?

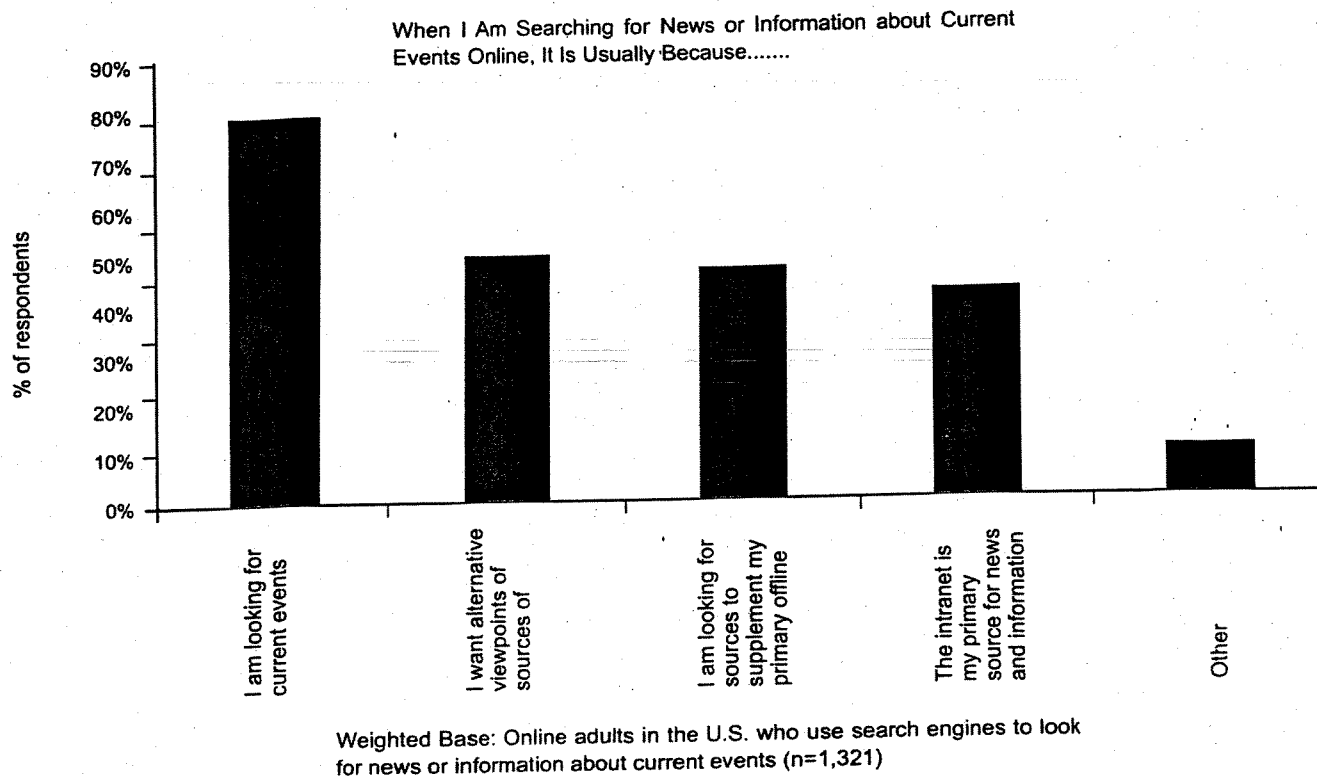
Some say the practice of reading a physical newspaper or watching the nightly news is generational. A good portion of today's younger population uses the internet as its primary source of news and information: 50% of those between the ages of 18 and 34 who use the internet for news or to find information about current events indicate the internet is their primary source for such information. This percentage steadily decreases as age increases.

It should perhaps not come as a surprise that almost half of online adults use search to find alternative viewpoints about current events. "With age comes wisdom," goes the old saying, and it appears that the wise among us realize there is more than one way to analyze news and information – the older online segments of our society are more likely to seek alternative views online.



HOW AMERICA SEARCHES  
June 2005

This also belies the belief by some that people are becoming increasingly myopic when it comes to the information they allow into their universe. With such a large percentage (45%) of online adults who use search engines to look for news or information about current events looking for differing viewpoints and 42% searching for supplemental information, it seems that we are still a very engaged society that seeks confirming as well as conflicting information.



Only 21% of those who use AOL for search at least 33% of the time say the internet is their primary news source, compared to 45% of Ask Jeeves users<sup>2</sup> and 44% of Google users. It is generally believed that AOL users are somewhat less experienced or technologically savvy than other ISP users; this may also extend to a lower reliance on the internet as their primary news and reference (e.g., the phone book) source as Google users.

<sup>2</sup> Very small weighted base (n=64).

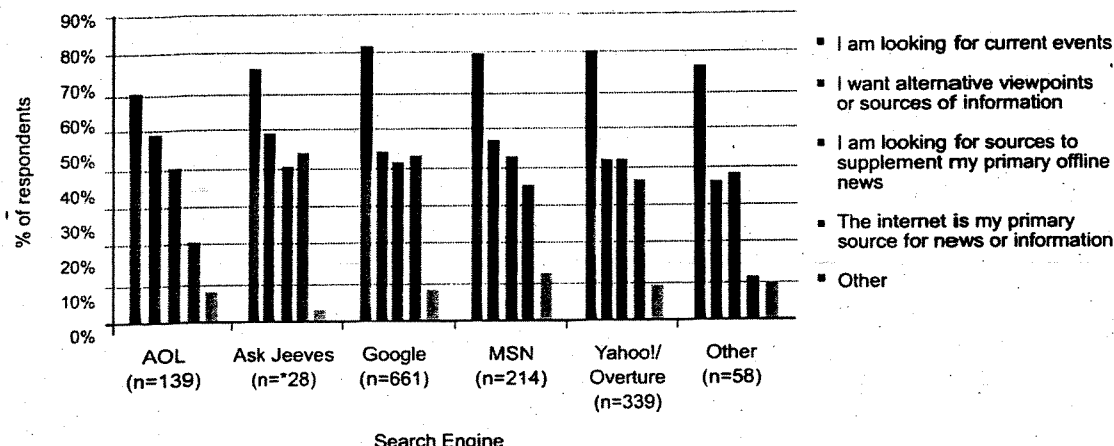




## HOW AMERICA SEARCHES

June 2005

When I Am Searching for News or Information about Current Events Online, It Is Usually Because.....



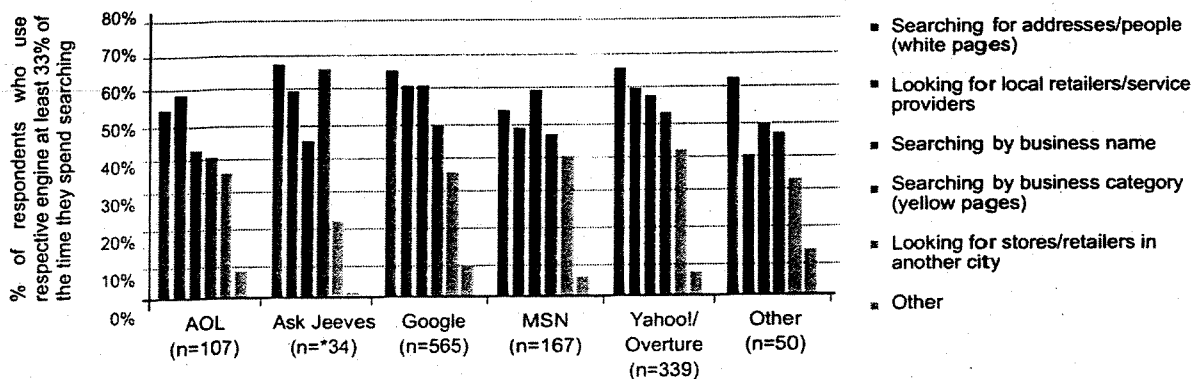
Search Engine  
Weighted Base: Online adults in the U.S. who use search engines to look for news or information about current events (n=1,321); \* note very small base

## A NEW WAY TO LET YOUR FINGERS DO THE WALKING...

54% of search engine users indicate they have used the internet instead of a phone book. The majority of online adults who are using the internet instead of the phone book (63%) search for addresses or phone numbers of people (rather than businesses) while 58% use it for specific (and mostly local) businesses. Somewhat fewer (38%) look for retailers or stores in another city.

Among those search users who say they use search engines instead of phone books, there are notable lows – only 37% of those who use AOL and 23% of Ask Jeeves users<sup>3</sup> are using the internet instead of the phone book to find stores and/or retailers in other cities. Most users in this breakout, no matter which engine they use, use search engines to find addresses or people and to conduct local searches for retailers and services.

When I am Using the Internet Instead of the Phone Book, I am Usually.....



Search Engine  
Weighted Base: Online adults in the U.S. who use search engines instead of a phonebook (n=1,103); \*note very small base

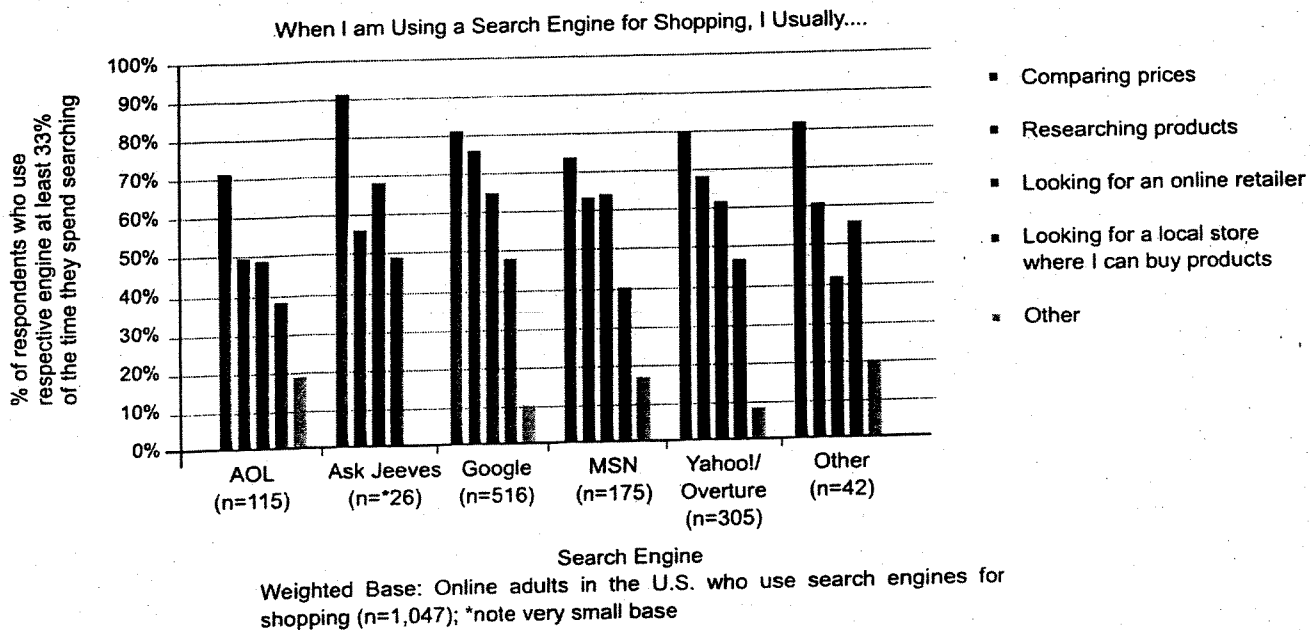


## IT'S ALL ABOUT THE DEAL...

The majority of online adults who use search for shopping (80%) are comparing prices. Shunning stereotypes, men (83%) are more likely than women (77%) to be comparing prices. Men are more likely than women to research products online (75% and 65%, respectively), while there isn't a large gender difference among those looking for an online retailer.

Interestingly, less than half of online adults who use search for shopping are looking for a local retailer of specific products and services.

In this breakout, 50% or fewer users of each engine included in the study say they are looking for local offline stores where they can purchase.



These data, combined with the results that indicate over 50% of search engine users use the internet as a phone book and 75% search for maps and directions, suggest that it will become increasingly critical for local retailers be found online – as critical as being in the yellow pages.

Nearly half of search engine users who use search for entertainment purposes, the majority (61%) are looking up show times or reviews. Not surprisingly, the younger population is more likely to download music or videos, with men doing so more than women.

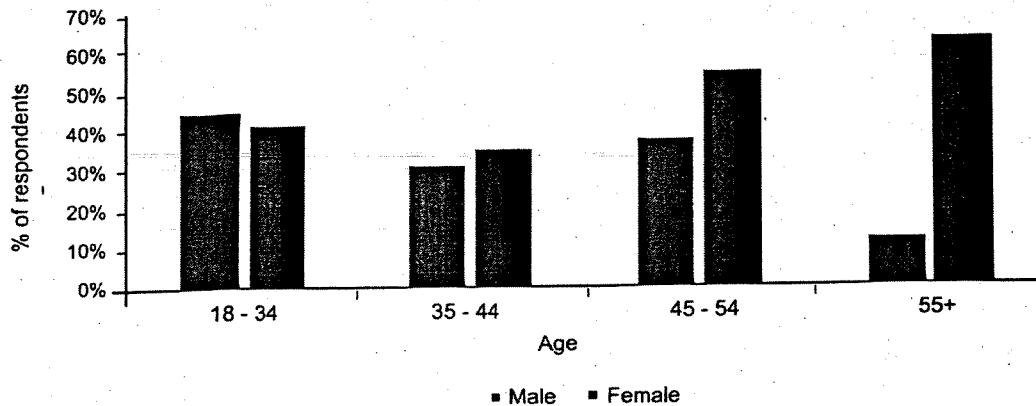
Online gaming, traditionally seen as a male-dominated area, is searched for among women slightly more so than men (45% of women compared to 38% of men within this subset). 55% of women in this group between the ages of 45 and 54 indicate that they search for games.



## HOW AMERICA SEARCHES

June 2005

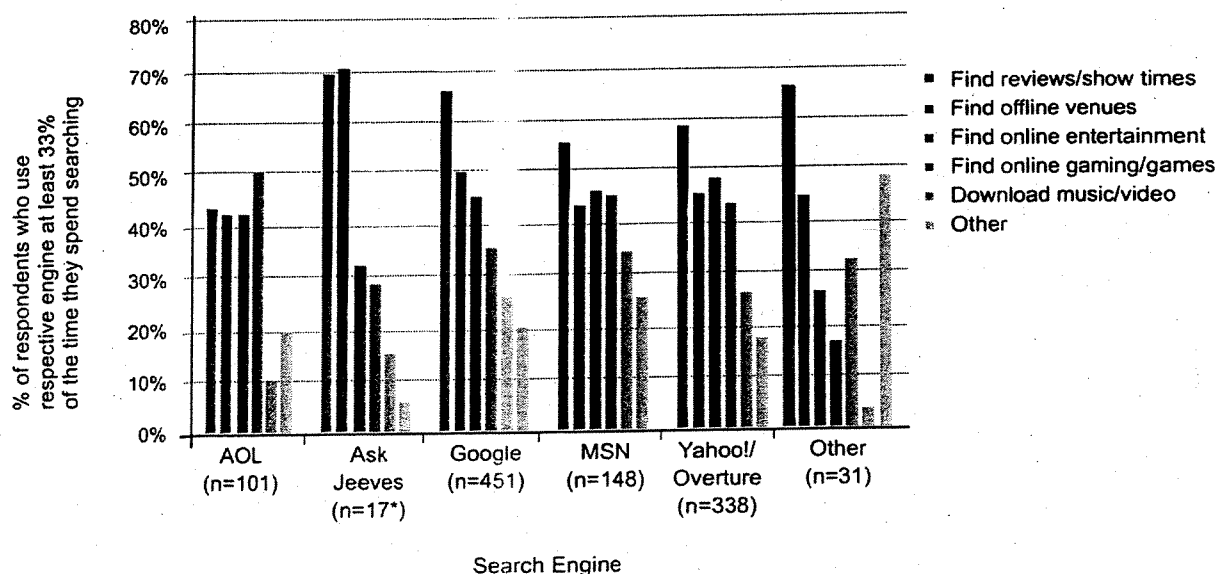
Percentage Who Say That When Using A Search Engine to Find or Look For Entertainment-Related Websites and Activities, They Are Usually Looking for a Website Where They Can Find Online Gaming/Games



Weighted Base: Online adults in the U.S. who use search engines to look for entertainment-related websites and activities (n=961)

Those who use AOL at least 33% of the time display a strong skew towards the use of search for online gaming and/or games while users of the other engines skew towards using search to find show reviews and/or times. Google, MSN and Yahoo! users also have sizable percentages interested in searching for online entertainment sites while MSN and Yahoo! users display notable skews towards online gaming and/or games.

When I am Using a Search Engine to Find or Look for Entertainment-Related Websites and Activities, I Am Usually Looking for a Website Where I Can....

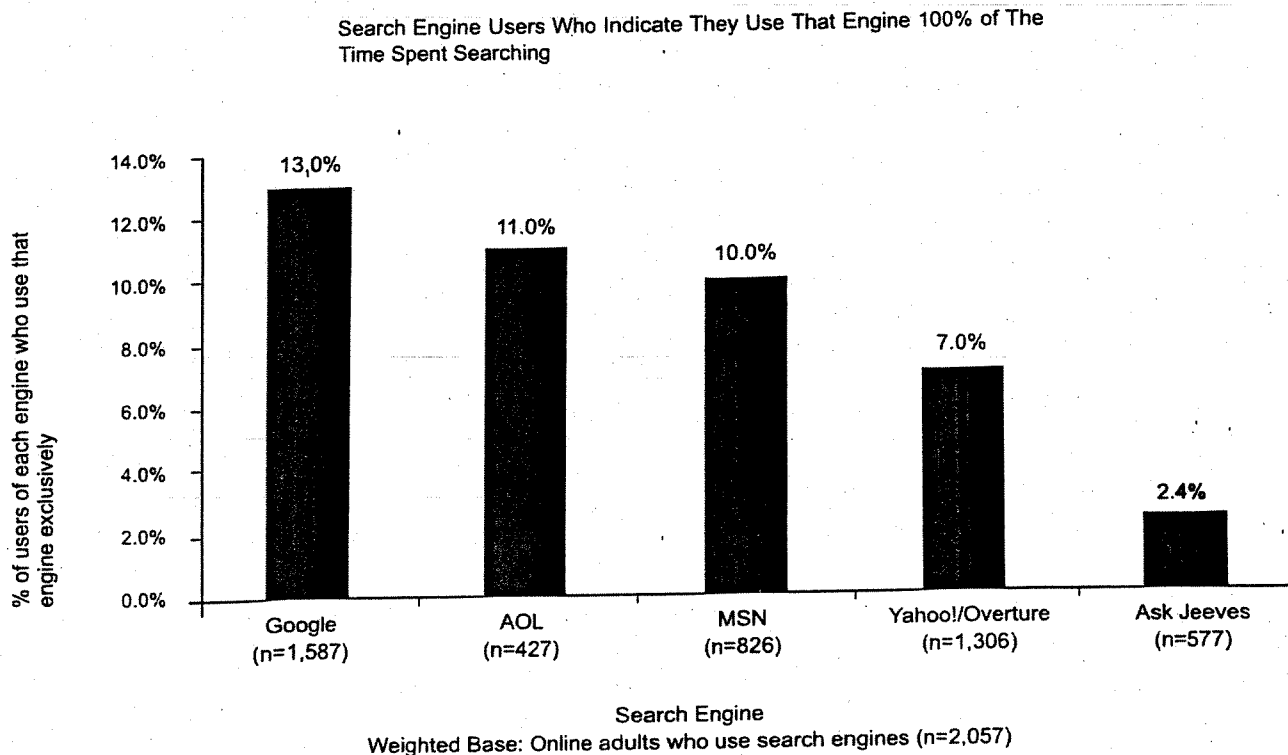


Weighted Base: Online adults in the U.S. who use search engines to look for entertainment-related websites and activities (n=961) ; \*note very small base



## DO ONLINE ADULTS DISPLAY ANY ENGINE LOYALTY?

Although many search engine users use Google (77%), people really aren't loyal to any one search engine. Google claims the greatest percentage of users who use it exclusively (13% who use Google use it 100% of the time) compared to the other engines presented in this study, but there is still plenty of room for growth. Internet users continue to rely on a number of engines to satisfy their search needs.



## IV. WHAT'S THE DIFFERENCE BETWEEN NATURAL AND PAID SEARCH ENGINE LISTINGS, ANYWAY?

Most people working in or with the search engine industry are constantly discussing and analyzing the difference between sponsored (paid) search engine listings and natural (non-sponsored) listings. But do internet users know the difference? Of listing they're clicking?

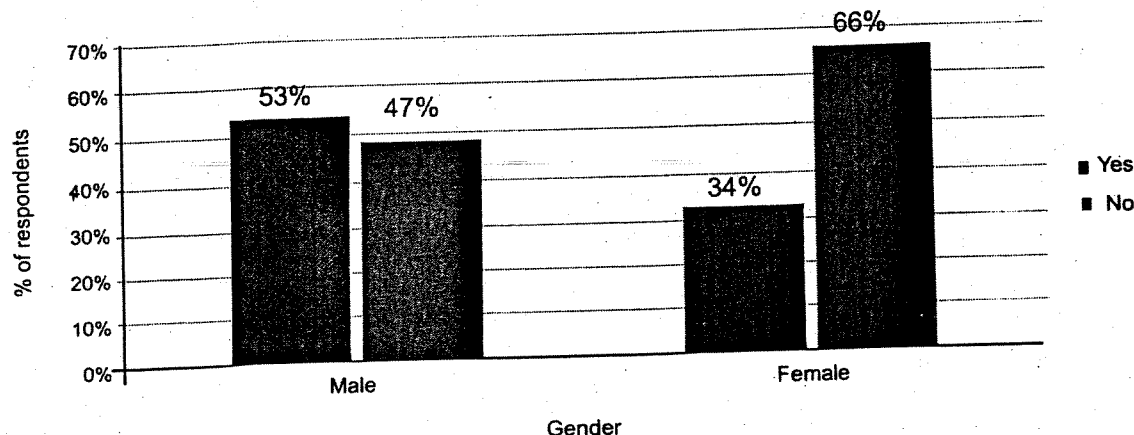
Less than half of internet users (44%) say they know the difference between a sponsored (paid) search engine result listing and a natural (non-sponsored) result listing. 56% do not know the difference between the listings. Younger search engine users and males are more likely to report knowing the difference.



## HOW AMERICA SEARCHES

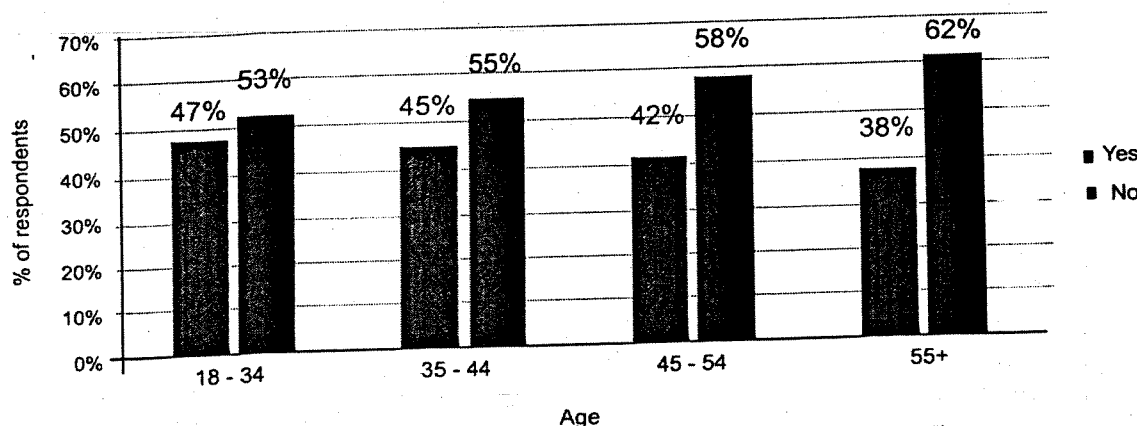
June 2005

Are You Familiar with the Difference Between Sponsored (Paid) and Natural (Non-Sponsored) Search Engine Result Listings?



Weighted Base: Online adults in the US who use search engines (n=2,057)

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Weighted Base: Online adults in the US who use search engines (n=2,057)

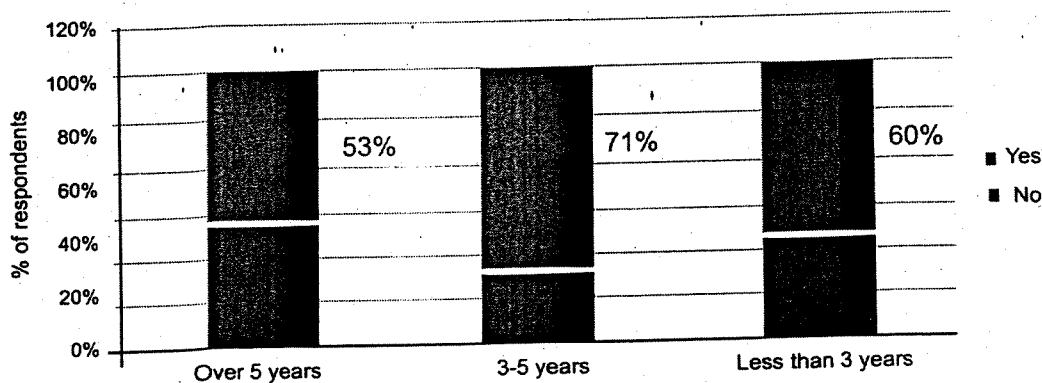
Among seasoned internet users - those with over five years of online experience - there is an almost even split between those familiar with the difference between paid and natural search engine listing (47% know the difference while 53% do not). Surprisingly, those with between three and five years' online experience are the least likely to know the distinction between paid and natural listing - only 29% of these users indicate they know the difference. There is less of a difference among those with less than three years of internet experience, as 40% understand the difference between sponsored and natural result listings.





HOW AMERICA SEARCHES  
June 2005

Are You Familiar with the Difference Between Sponsored (Paid) and Natural (Non-Sponsored) Search Engine Result Listings?

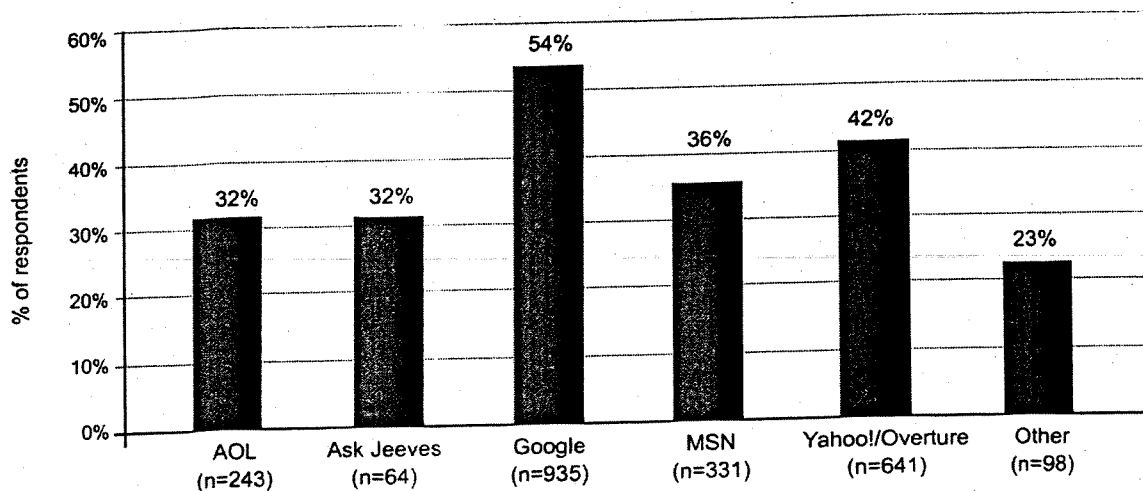


Internet Experience

Weighted Base: Online adults in the US who use search engines (n=2,057)

Those who use Google at least 33% of the time are more likely to know the difference between paid and natural listings, with over 50% understanding the difference, compared to less than 40% of MSN, AOL and Ask Jeeves users. This could reflect the nature by which the results are presented on each of the engines.

Are You Familiar with the Difference Between Sponsored (Paid) and Natural (Non-Sponsored) Search Engine Result Listings?



Search Engine

Weighted Base: Online adults in the US who use search engines (n=2,057);

\*note very small base



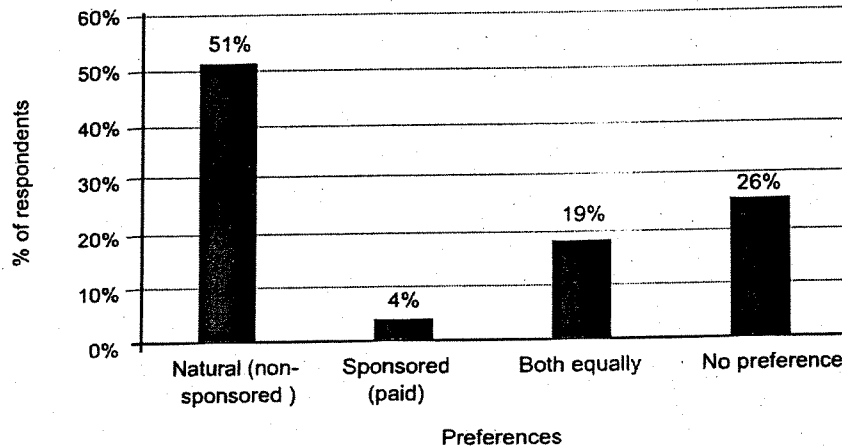
## HOW AMERICA SEARCHES

June 2005

## V. WHO CARES WHAT THE DIFFERENCE IS BETWEEN ALL THE LISTINGS?

About half (51%) of search engine users who know the difference between paid and natural result listings prefer natural results. Beyond those people, a greater number of respondents report having no preference (26%) than those who prefer both equally (19%).

Which Type of Search Engine Result Listings Do You Usually Prefer?

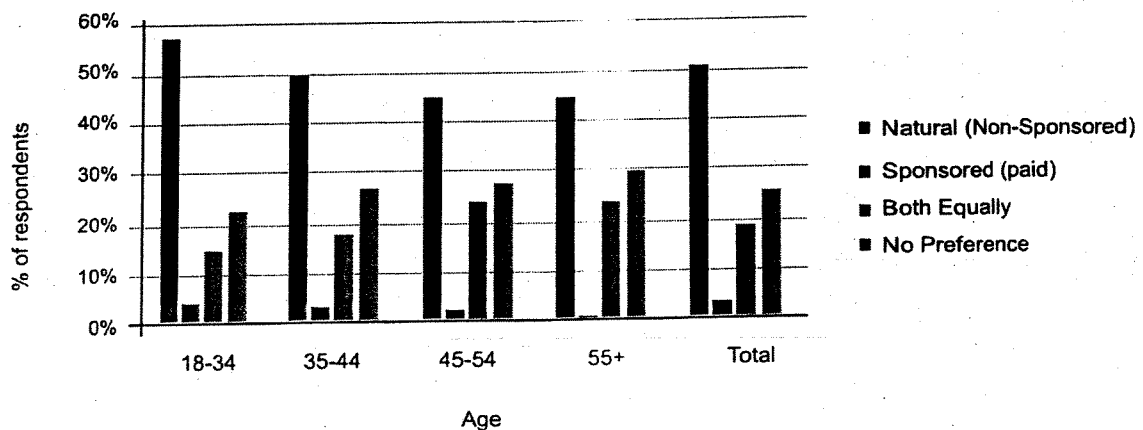


## Preferences

Weighted Base: Online adults in the US who use search engines and are familiar with the difference between sponsored (paid) and natural (non-sponsored) search engine result listings (n=896)

Younger (adult) internet users (aged 18-34) are much more likely to express a preference between either sponsored or natural listings – they are far more likely to prefer natural results but also more likely to prefer paid listings. As age increases, so does the tendency to have no preference or prefer both types equally.

Which Type of Search Engine Result Listings Do You Usually Choose or Prefer?



## Age

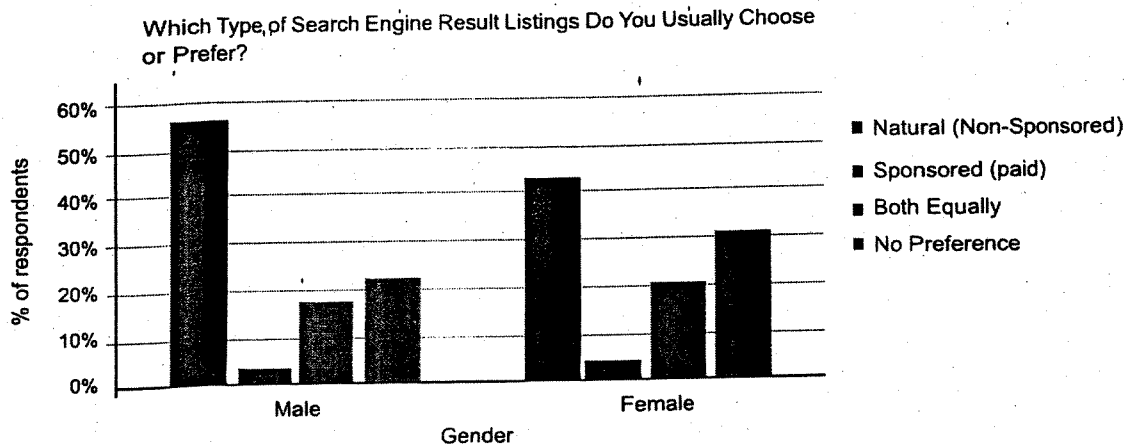
Weighted Base: Online adults in the US who use search engines and are familiar with the difference between sponsored (paid) and natural (non-sponsored) search engine result listings (n=896)



## HOW AMERICA SEARCHES

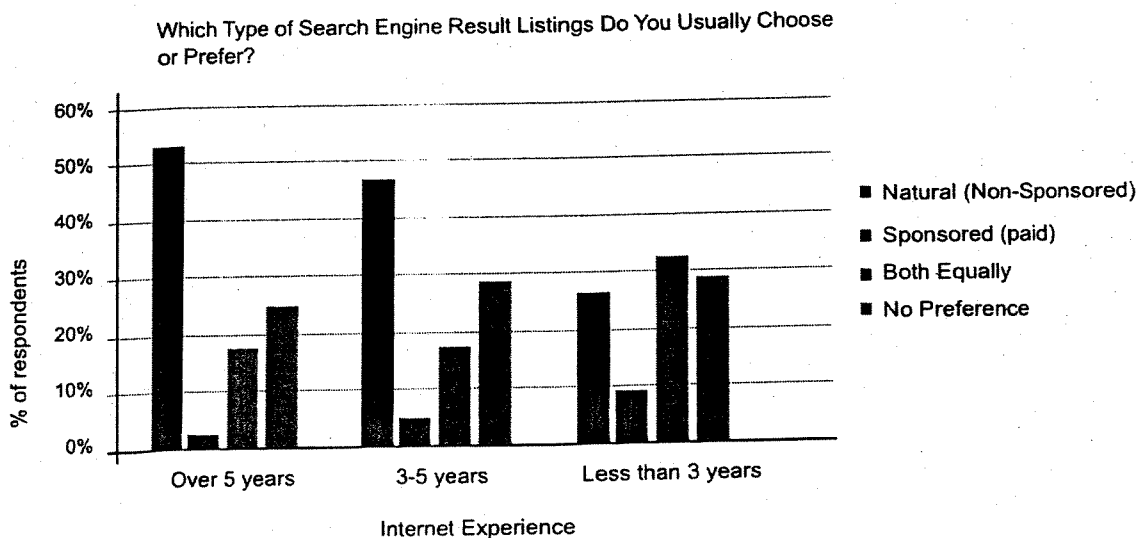
June 2005

Males show a much greater preference for natural results, while females are more likely to say they have no preference.



Weighted Base: Online adults in the US who use search engines and are familiar with the difference between sponsored (paid) and natural (non-sponsored) search engine result listings (n=896)

Among search engine users who have been online between three and five years, 47% say they prefer natural listings. Those who are newest to the internet – search engine users with less than three years online – are split fairly evenly between a preference for natural (27%), using both equally (33%) and having no preference at all (29%). However a majority (53%) of those with the most internet experience (over five years) prefer natural listings whereas only 25% claim to have no preference.



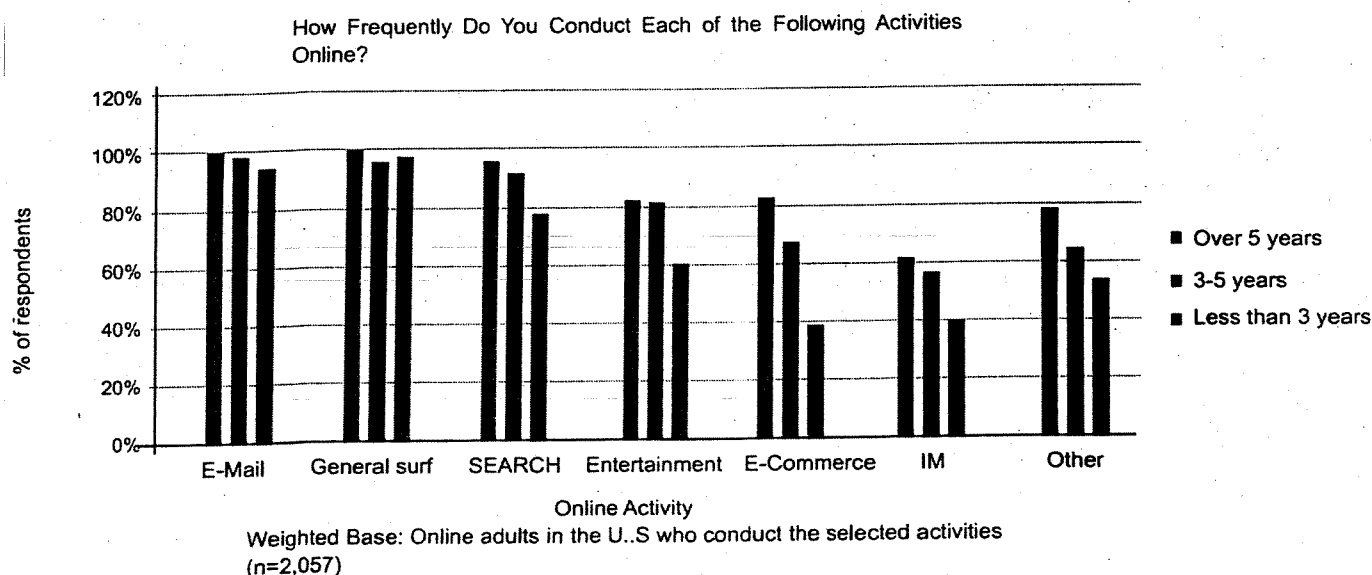
Weighted Base: Online adults in the US who use search engines and are familiar with the difference between sponsored (paid) and natural (non-sponsored) search engine result listings (n=896)



## VI. THEY USE SEARCH ENGINES, BUT WHO ARE 'THEY?'

Over three-quarters of online adults have been using the internet for five or more years, and 93% have been online for at least three years. However, the classification of light, medium and heavy users is fairly even: only 22% of the online population is online more than 22 hours each week.

The longer people have been online, the more likely they are to use search. But a notably strong 80% of those people who have been online for less than three years say they use search engines – compared to 40% of this group citing e-commerce usage and 40% who say they use IM.



Internet connectivity among online adults is fairly evenly split between cable modem, DSL and dial-up (56K or slower). Connectivity may also account for differences in the number of hours people spend online (those who are online longer each week are more likely to have high speed connections).



**HOW AMERICA SEARCHES**  
June 2005

Internet Experience — Number of Years Online	
Less than 1 year	2%
1-2 years	5%
3-5 years	16%
Over 5	77%
Internet Usage — Number of Hours per Week Spent Online	
0 hours	1%
1-7 hours	33%
Total "light" users	34%
8-14 hours	21%
15-21 hours	23%
Total "medium" users	44%
22-28 hours	5%
29-35 hours	8%
36-42 hours	5%
43+ hours	4%
Total "heavy" users	22%
Internet Connectivity	
56k modem	25%
Cable modem	31%
ADSL/DSL	23%
Other/don't know	21%

The study determined that those people who have been online the longest – those with over five years of experience – are more likely to have graduate and undergraduate degrees whereas the newest members of the internet community (those with less than three years under their belts) are likely to have completed the least amount of education.





# HOW AMERICA SEARCHES

June 2005

## Survey Respondents - Basic Demographics

### Gender

Female	52%
Male	48%

### Age

18-34	37%
35-44	24%
45-54	18%
55+	21%

### Marital Status

Married	52%
Single, never married	27%
Divorced	10%
Separated	1%
Widowed	3%
Living with partner	7%

### Education

Completed some highschool	5%
High school graduate or equivalent	29%
Completed some college	24%
College graduate	22%
Completed some graduate school	3%
Completed graduate school	8%

### Region of residence

Northeast	23%
Midwest	24%
South	31%
West	22%

### Employment status

Employed full time	51%
Employed part time	13%
Self-employed	7%
Not employed	10%
Retired	13%
Student	14%
Homemaker	11%

### Household Income - Total for 2004 before taxes

\$24,999 or less	14%
\$25,000 - \$49,999	22%
\$50,000 - \$99,999	35%
\$100,000 - \$149,999	10%
\$150,000 or more	2%



HOW AMERICA SEARCHES  
June 2005

## METHODOLOGY

Harris Interactive® fielded the study on behalf of icrossing from April 19-21, 2005, via its QuickQuerySM online omnibus, interviewing a nationwide sample of 2,139 U.S. adults (aged 18+). Data were weighted to reflect the total U.S. online adult population on the basis of region, age within gender, education, household income, race/ethnicity, and amount of time spent online. In theory, with a probability sample of this size, one can say with 95 percent certainty that the overall results have a sampling error of plus or minus 3 percentage points of what they would be if the entire U.S. adult online population had been polled with complete accuracy. Sampling error for the various sub-sample results is higher and varies. This online sample was not a probability sample.

Note: AltaVista was presented to survey respondents as an option when asked which search engines they used, however only 9 respondents flagged the search engine as one that they used. With such a small base, the results were not included in this report.

## CONTACT icrossing

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## ABOUT icrossing

Search engine marketing agency icrossing has been connecting businesses with qualified customers through the medium of search since 1998. Today, icrossing applies its experience, technology, and unparalleled client service to many of the leading brands around the world. icrossing serves its clients with Natural Search Engine Optimization, Paid Search Management, Search Analytics, Search Intelligence™ and Content Services™. With its dedicated focus on search engine marketing, icrossing continuously pioneers new and better ways to help clients meet and surpass their goals through customized solutions.



HOW AMERICA SEARCHES  
June 2005

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