

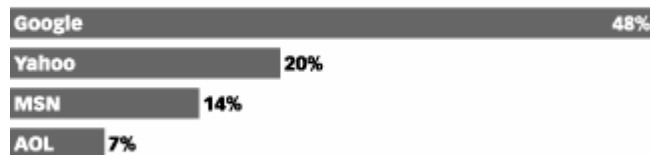
Google Has Many Fans

July 2004

Google is the most used search engine in the US, with 48% of those surveyed in a recent Standard & Poor's/InsightExpress poll using it as their primary search engine.

Standard & Poor's Equity Research Services surveyed 1,000 US consumers 18 and older between April 14 and 19, 2004. The results determine that Google is the most used search engine, with Yahoo!, used by about half as many people as Google, a distant second. MSN and AOL, in comparison, get even fewer users.

Search Engine Used Most Often by US Internet Users, April 2004 (as a % of respondents)



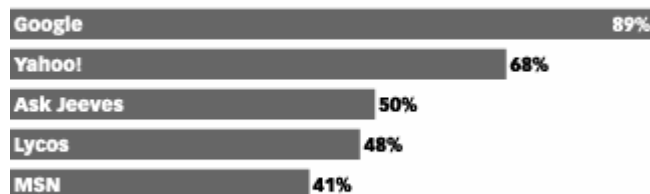
Source: Standard & Poor's and InsightExpress, June 2004

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Google's popularity is tied to the positive experience conveyed by its users regarding its effective, clean and simple presentation. In a poll by Vividence Corporation, 89% of respondents reported a "strongly positive" experience from using Google. Other search engines lagged behind, with only Yahoo! inspiring a majority of users (68%) to rate it so highly. The Ask Jeeves, Lycos and MSN search experiences were all rated strongly positive by between 40% and 50% of respondents.

US Internet Users Who Have Had a "Strongly Positive" Experience with Select Search Engine Sites, 2004 (as a % of respondents)



Note: n=2,000

Source: Vividence Corporation, May 2004

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Google has attained the top spot in search by delivering a quality product, but should the quality decline, Google could easily lose its dominance. Although Vividence found that only 9% of Google users are open to switching to a different search engine, Standard & Poor's found that 63% of Google users would switch to a different search engine if a better product came along. As it expands into other areas such as Web-based e-mail and concentrates on its upcoming IPO, Google needs to be sure to not let its search product slip from neglect, or lose sight of the brand attributes that made it popular.