Harvest Digital

User attitudes to search

How do experienced Internet users feel about search engines?

User research conducted by Metro Research – April 2006
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How experienced Internet users feel about search.

- 76% of people use more than one search engine
- More than two thirds of users generally search for three or more keywords
- A quarter of respondents blame companies paying for high positions for poor quality search results

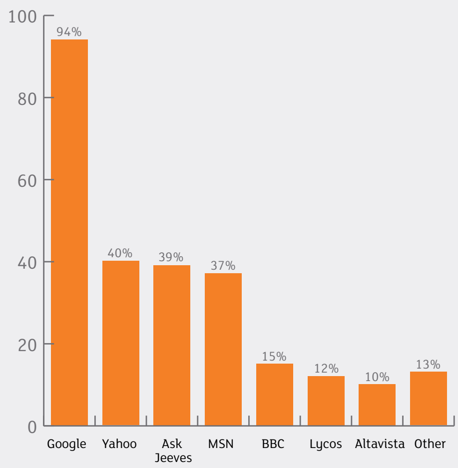
Search marketing is fantastic at producing data, but sometimes insight is a little more elusive. We know a great deal about the search terms that people use, but little about general attitudes to search. A richer understanding of how users feel about search engines is a vital component of effective search marketing. This research asked people why they made those choices and established how much time people spend searching, how many search engines they use and how successful their searches usually are.

The research project, conducted by London-based research company Metro Research, took place via a series of online questionnaires. The 205 respondents have all spent a minimum of 10 hours a week online over the last 3 years. These are people for whom the Internet has lost its novelty value – instead it has become an integral part of their daily lives, used for work, entertainment, communication and researching new purchases. Almost half (47%) spend 3 hours or more each week on searching alone.

That time is relatively productive, with 69% of respondents reporting that they find what they need most of the time. However, search clearly represents a product that is not perceived to be 100% reliable – and perhaps it can never be, as user expectations rise in line with improvement to search technology. Users get the most from search engines by using more keywords in searches – more than two thirds report using three words or more in every search – and using more than one search engine. The more time users spent searching each week, the more search terms they tended to use.

When we asked which search engines our sample used, Google predictably came top with 94% - so almost everyone uses Google at some stage in their surfing. This figure is much higher than the reported market share for Google – for example, Nielsen NetRatings' figures for November 2005 gave Google a 46% share of all searches. Google's rivals have nothing like the universal appeal of Google. The closest competition – all hovering around the 40% mark – is Yahoo, Ask Jeeves and MSN, Google still hold more than twice

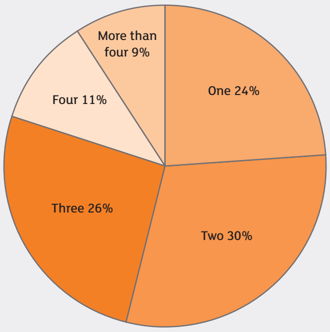
1. What search engines do you use?



But whilst most people are performing some searches with Google, very few of our sample only uses Google. In fact only 24% of respondents were only using a single search engine exclusively; most users habitually use more than one search engine and 20% of our sample regularly uses four or more search engines.

So whilst Google clearly dominates the UK search landscape at present, these statistics suggest that that dominance will need to be continually earned in terms of perceived better performance. Any product improvements by their rivals would potentially be spotted quite quickly by these users as they switch between different search engines.

2. Number of search engines used

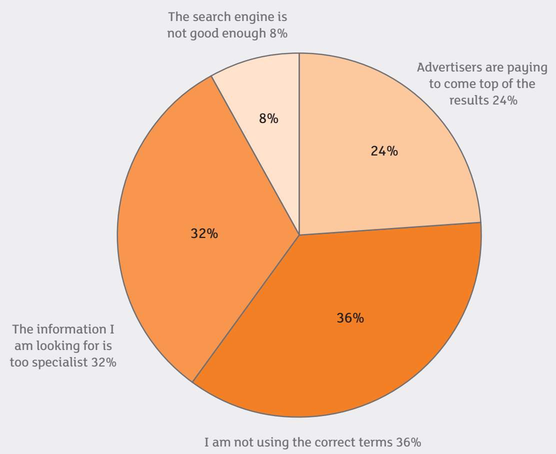


The AOL / Henley Centre ‘Brand New World’ research found that search engines were the single most important source of information to consumers researching a purchase.

There seems to be a tension between this high level of trust in search engines with the reported failure of search engines to return accurate results across many searches. Our survey found that only 22% of users were confident that search engines would always give them the information that they needed. When we asked why some searches are less successful, very few users (8%) pointed the finger at poor search engine performance. Instead, 36% said they were not using the correct terms and a further 32% said that they were looking for information that is too specialist.

Ironically, we saw a clear correlation between the amount of time people spent searching and their tendency to blame themselves for poor results: light users were more likely to complain about search engine performance.

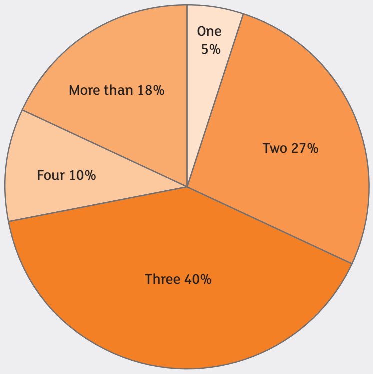
3. Why do you think some of your searches are less successful



Almost a quarter of people blamed advertisers for paying for high search positions – clearly there are some important issues for the search engines to sort out here, since sponsored search is a critical part of their revenue model.

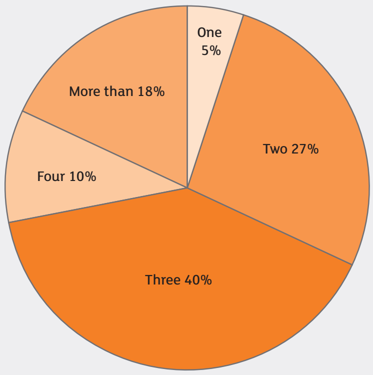
We didn't attempt to research attitudes to paid search versus organic search, but nevertheless there are some interesting findings for the search marketing sector. Clearly experienced users are tending to use more complex searches: only 5% ever used single word searches, presumably because they had found them to be unsuccessful. Of course this is a lesson that paid search professionals have already learned – to take a single example, advertisers are already bidding more for the phrase "cheap car insurance" than "car insurance".

4. How many words do you normally enter into a search box



We asked our panel why they would choose to click on one search listing rather than another. Relevance was an important factor for 32% ("The description looks most like what I'm looking for"), but surprisingly rank was much more important. 43% said they would click on a listing on the first page of search results, and a further 17% would primarily click on listings at the top of the first page.

5. In your search results, which factors are most important in selecting the result to click on?

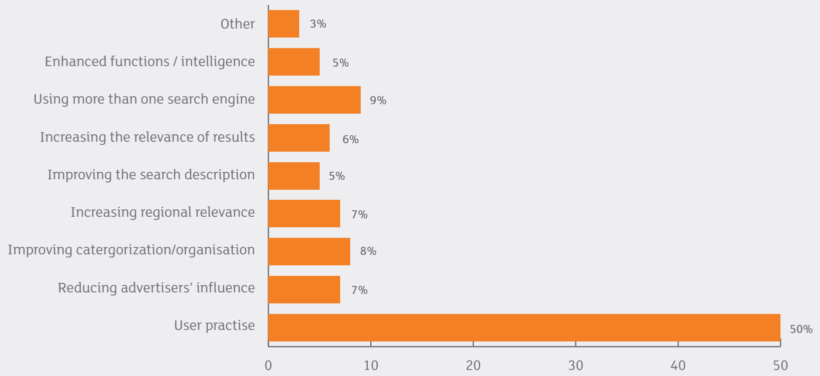


Very few people (8%) said they were influenced by a reputable brand or web address. This suggests that large brands cannot expect an easy ride in search – they have to work just as hard as anyone else to get a high ranking and create relevant search description copy.

We asked users to think about factors that would improve their searching experience. In line with previous results, half of our sample said that they had to learn or practise new techniques to make searching more effective. This begs the question of where this learning is going to come from. Search engines have tended to follow the Google example where complexity is hidden behind very simple, stripped down interfaces. However, clearly users find the logic behind how search works a complete mystery.

This is more than simply an academic question. With users spending more than 3 hours a week on search, the implication is that business efficiency is almost certainly being impaired through lack of search skills.

6. How would you improve your searching experience?



Users had markedly less enthusiasm for the kind of technical innovations that appear to be a focus for search engines. Only 5% asked for enhanced functions and intelligence: the perception is that search engines are good enough, but the users themselves need to be upgraded!

The big battleground for search in 2006 is likely to be the launch of MSN Search as a well-funded rival to Google. One final result may suggest that Google will need to fight hard to maintain its market share: when we correlated search engine use against users reported satisfaction at search engine results Google came second, narrowly losing out to MSN Search.

About Harvest Digital

Harvest Digital is a full-service online marketing agency specialising in media planning and buying, search marketing and online marketing creative.

Formed in 2001, the company is privately owned by staff. Based in London, clients include Tesco, Auto Trader, Thomas Cook, 3M, Tiscali and Shelter.
www.harvestdigital.com

About Metro Research

Established at the beginning of 2000, Metro Research is an integrated technology market research and usability agency. Metro provides services in primary research, desk research, market reporting and usability & accessibility testing. Metro's clients include Orange, HP, Microsoft, BT and Sony.
www.metroresearch.com

Survey details

- Harvest Digital commissioned Metro Research to undertake the survey.
- 205 people who have been using the internet for more than three years and who use the internet for at least ten hours per week were surveyed.
- A copy of the survey results is available on request.