



For Immediate Release:
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**MAJORITY OF ONLINE SEARCHERS USE MULTIPLE SEARCH ENGINES,
POINTING TO A FLUID COMPETITIVE LANDSCAPE,
ACCORDING TO NIELSEN//NETRATINGS**

Nielsen//NetRatings MegaView Search Service Releases Latest Online Search Engine Share: Google Secures 47 Percent of All Searches; Yahoo! Garneres 21 Percent; MSN Captures 13 Percent

NEW YORK – February 28, 2005 - Nielsen//NetRatings, the global standard for Internet audience measurement and analysis, reported today that a minority of searchers exclusively use only one of the top three search engines—Google Search, Yahoo! Search and MSN Search.

According to the latest custom research from Nielsen//NetRatings MegaView Search, 58 percent of Google searchers also visited at least one of the other top two search engines, MSN Search and Yahoo! Search, showing that even though Google’s market share is dominant today, there is significant opportunity for its competitors to grow their share (see Table 1). The use of multiple search engines is not limited to Google’s searchers. Nearly 71 percent of those who searched at Yahoo! also visited at least one of the other top two search engines, and 70 percent of those who searched at MSN also tried their luck at one or both of the other two.

“While it shouldn’t surprise anyone that Google is the search engine to beat, it is critical that all of the major search players, including Google, recognize that they exclusively own only a minority of their users,” said Ken Cassar, director, strategic analysis, Nielsen//NetRatings. “This highlights an opportunity and a threat to all of the established players in the market, and underscores the importance of continued innovation in a highly competitive market that is anything but mature.”

Table 1: Top 3 Search Engines Ranked by Percent of Searchers Who Also Used Another Top 3 Search Engine, January 2005, U.S., Home & Work

Search Engine	Total Unique Searchers* (000)	Unique Searchers Who Also Used Another Top 3 Search Engine (000)	Percent of Users Who Also Used Another Top 3 Search Engine
Google Search	70,998	41,267	58%
Yahoo! Search	46,774	33,099	71%
MSN Search	40,250	28,021	70%

Source: Nielsen//NetRatings MegaView Search, February 2005

*Note: Unique searchers are the total number of unique visitors that have engaged in search activity at the search engine during the specified reporting period, excluding internal site searches.

Drilling down into the user overlap at the top three search engines, Nielsen//NetRatings found that Google users showed a higher degree of loyalty than its competitors. While Google shared 58 percent of its visitors: 26 percent with Yahoo!, 19 percent with MSN, and 14 percent with both Yahoo! and MSN, its competitors’ overlap of searchers was higher. Yahoo! shared 71 percent of its traffic: 39 percent with Google, 11 percent with MSN, and 21 percent with both Google and MSN. MSN shared 70 percent of its traffic: 33 percent with Google, 13 percent with Yahoo!, and 24 percent with both Google and Yahoo!

Table 2: Overlap of Searchers at Top 3 Search Engines, January 2005, U.S., Home & Work

Search Overlap	Google Search	Yahoo! Search	MSN Search
Google, Yahoo! Only	26%	39%	N/A



Google, MSN Only	19%	N/A	33%
Yahoo!, MSN Only	N/A	11%	13%
Google, Yahoo!, MSN	14%	21%	24%
Percent of Users Who Used Another Top 3 Search Engine	58%	71%	70%

Source: Nielsen//NetRatings MegaView Search, February 2005

Industry’s Latest Search Rankings for January 2005

Nielsen//NetRatings also reported today the latest rankings of online search engines based on the number of search query volume. A search is defined as a query conducted at a search engine and excludes internal site searches (e.g. searching for a stock symbol). Google Search led with 47 percent of all online searches, followed by Yahoo! Search and MSN Search with 21 percent and 13 percent, respectively (see Table 3). More than 80 percent of all searches were conducted at one of the top three search engines. The rankings were based on searches conducted at more than 60 search sites during January 2005.

“With more share than its two nearest competitors combined, Google sets the pace in the search business,” said Cassar. “However, the opportunities that MSN and Yahoo! enjoy by virtue of their broader media offerings give them an important platform from which to attack the industry leader.”

Table 3: Top Search Engines by Search Share, January 2005, U.S., Home & Work

Search Engine	Searches* (000)	Share of Total Searches
Google Search	1,923,153	47%
Yahoo! Search	868,174	21%
MSN Search	523,188	13%
Total	4,085,880	--

Source: Nielsen//NetRatings MegaView Search, February 2005

* Note: Searches are the total number of queries conducted at a search engine during the specified reporting period, excluding internal site searches.

Search Research Revealed at Search Engine Strategies 2005 Show in New York

Ken Cassar, director, strategic analysis, Nielsen//NetRatings, will be presenting the latest search findings at “The Search Landscape” session on Monday, February 28, at 11:00AM, at the Hilton New York.

About Nielsen//NetRatings

Nielsen//NetRatings, a service provided by NetRatings, Inc. (Nasdaq: NTRT), is the global standard for Internet audience measurement and analysis and is the industry’s premier source for online advertising intelligence with its NetView, AdRelevance, @Plan, WebRF, MegaPanel and SiteCensus services. Covering 70 percent of the world’s Internet usage, the Nielsen//NetRatings services offer syndicated Internet and digital media research reports and custom-tailored data to help companies gain valuable insight into their business. For more information, please visit www.nielsen-netratings.com.

Editor’s Note: Please source all data to Nielsen//NetRatings MegaView Search.

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