

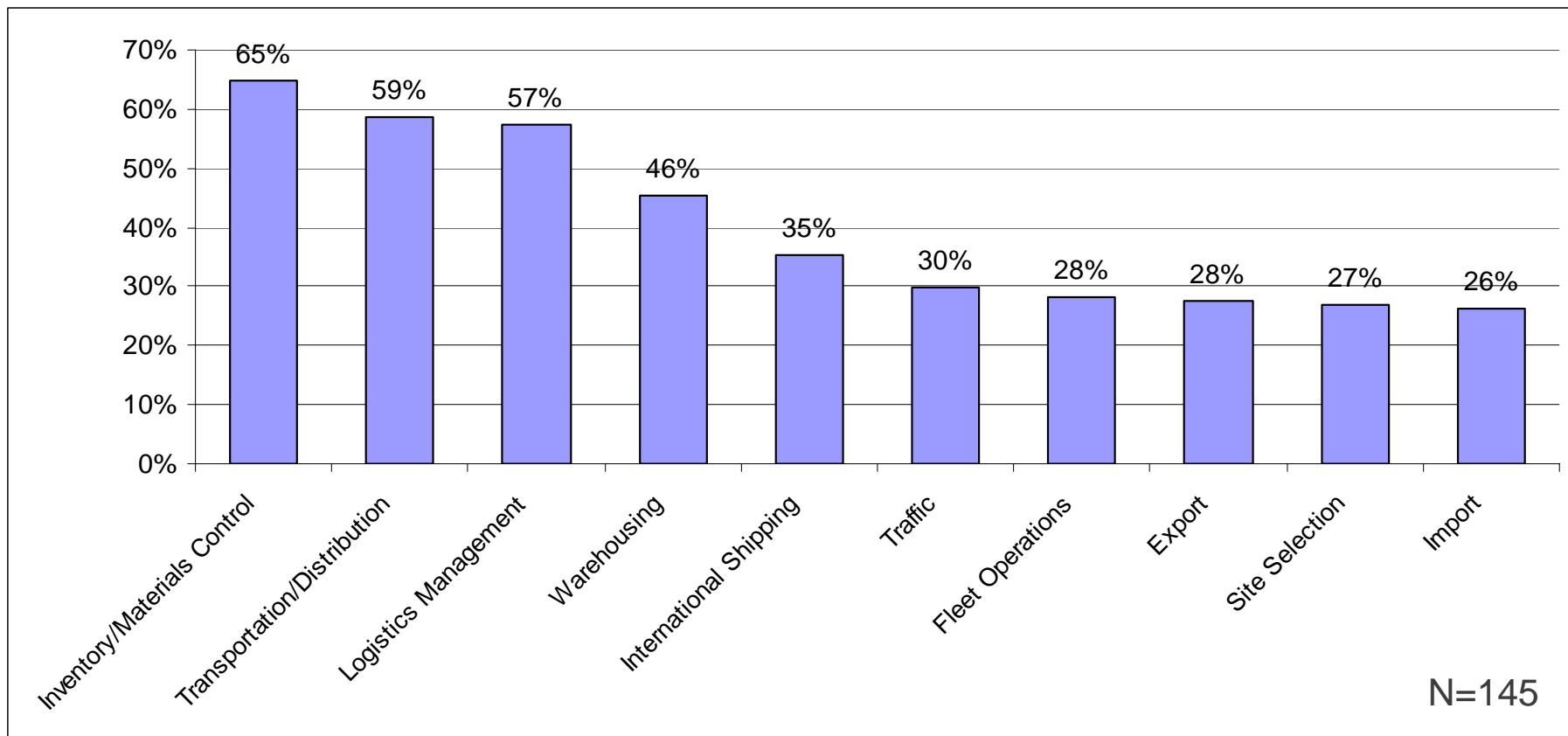
We surveyed a total of 200 business professionals that use the web to research Logistics services and information

- A custom survey instrument (i.e. questionnaire) was developed to measure respondents' use of the web, and search engines in particular, for researching Logistics services, including Transportation, Supply Chain, Warehousing, Distribution and Fulfillment.
- The survey was conducted online, through a web-based interviewing process, in April 2005
- Quota sampling was imposed to ensure an even mix of small and medium-sized businesses
- Respondents were recruited through a variety of methods: web advertising, permission-based databases, public relations, telephone recruitment, partner-recruited panels, and alliances with heavily trafficked portals
- The survey was designed and administered by Media-Screen, an independent strategic market research firm, with sample provided by GMI (Global Market Insite)

Executive Summary

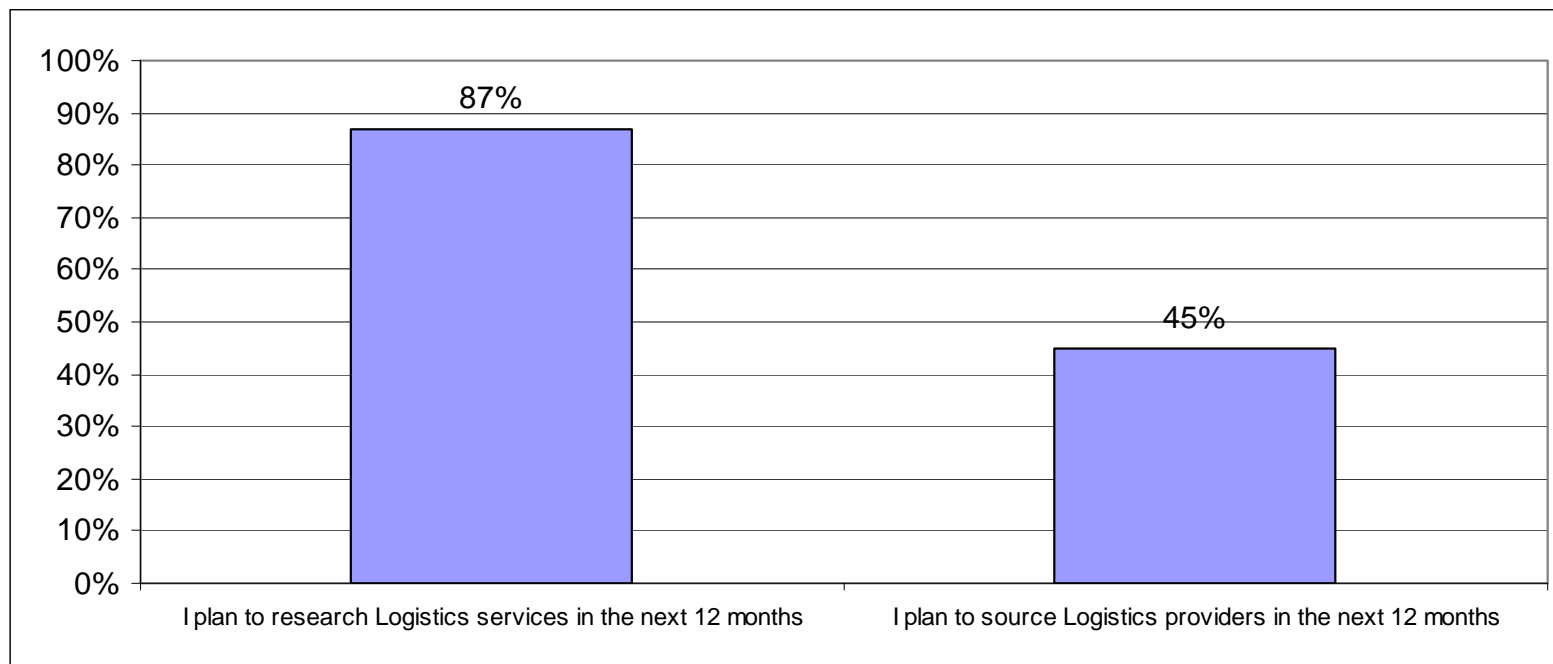
- 91% of respondents **use a search engine** to help research and logistics or source logistics providers
- 57% of those who use a search engine, **use Google** most often for this purpose
- Search engine usage:
 - 57% of Google users who have researched logistics **information** and/or **source** logistics providers **start by using a search engine**
 - 87% of Google users **plan to research logistics** services and 45% **plan to source logistics providers** in the next 12 months
 - 98% of those Google users **who are planning** to research logistics services or to source a logistics providers **will use a search engine** to help them
- After using a search engine to help research logistics services, 48% of Google users **pursued more information offline**, via phone or face-to-face meetings

65% of Google users are involved with Inventory/Materials Control and 59% with Transportation/Distribution



Are you involved in any of the following functions for your company? Select all that apply

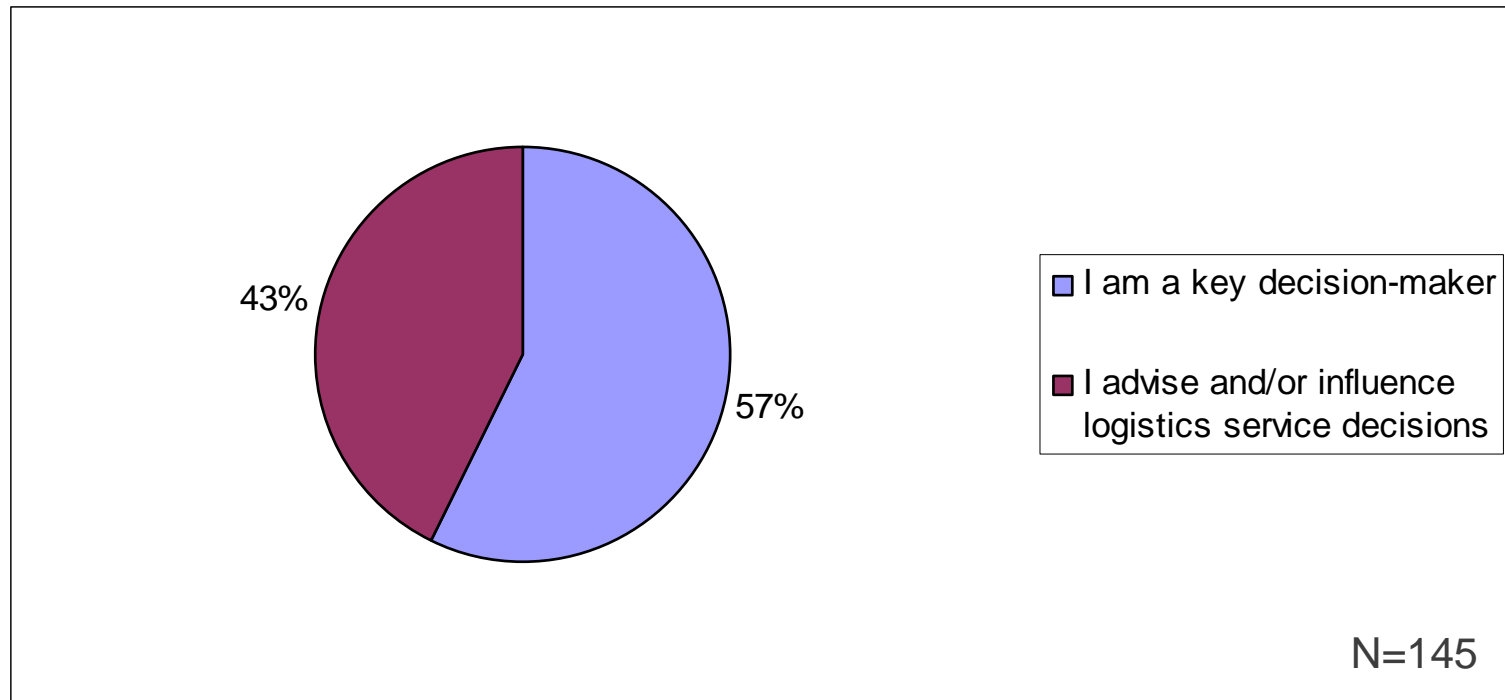
87% of Google users plan to research Logistics services and 45% plan to source Logistics providers in the next 12 months



N=145

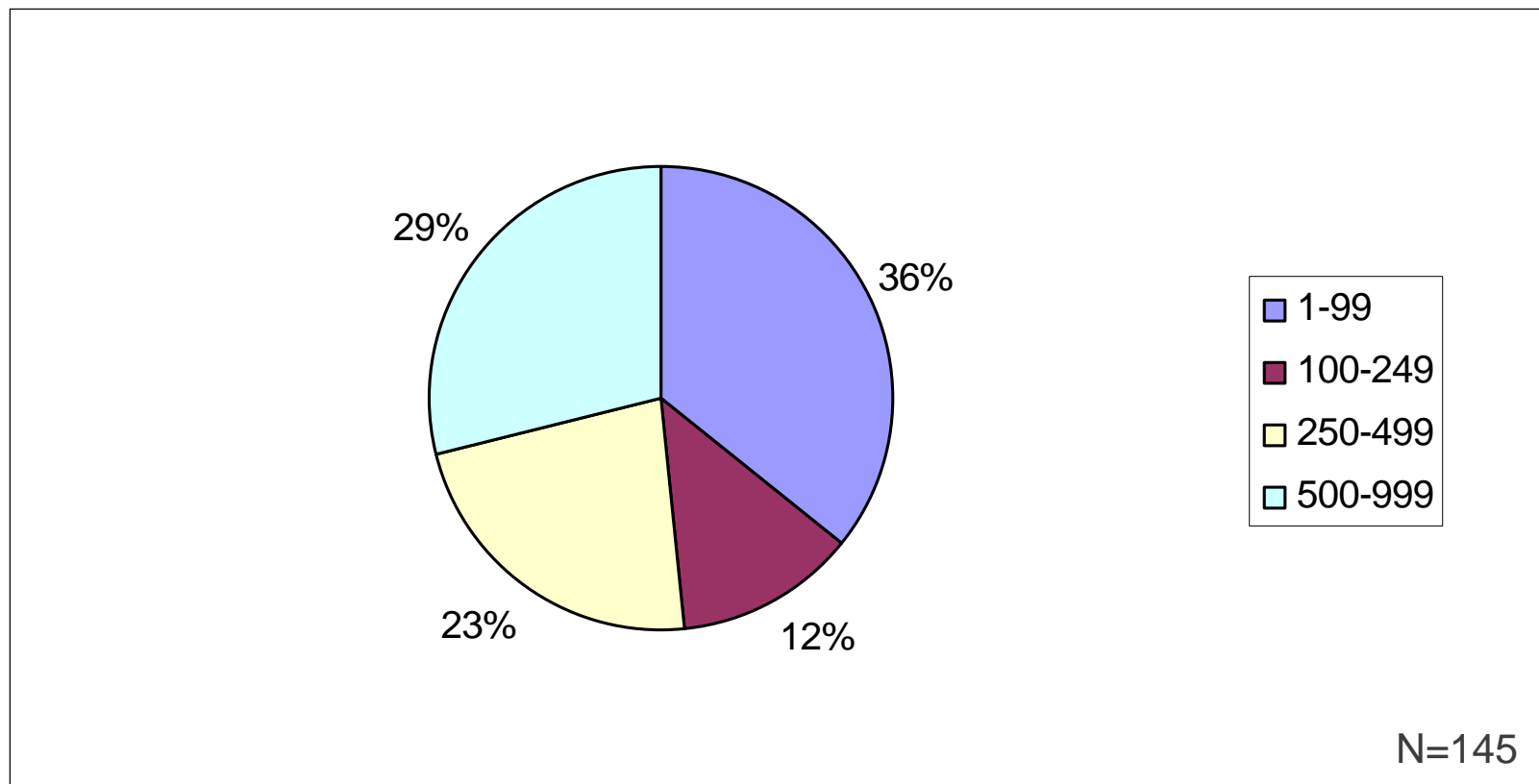
Do you plan to research and/or source providers for any Logistics Services in the next 12 months? As a reminder, by “Logistics Services,” we are referring specifically to Transportation, Supply Chain, Warehousing, Distribution, and Fulfillment. Please select all that apply.

57% of Google users are key decision-makers and 43% advise and/or influence decisions about Logistics services for their companies



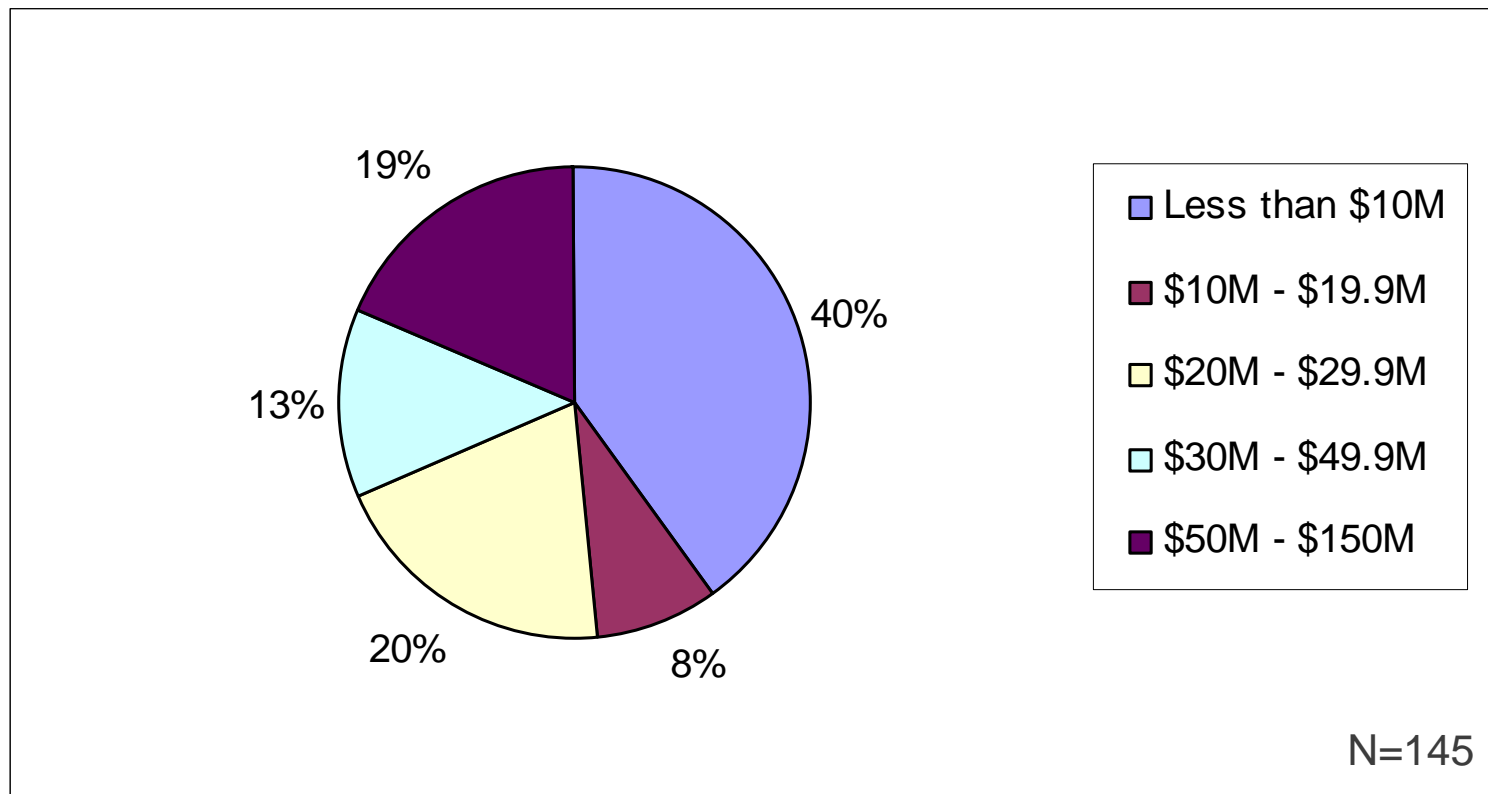
Which of the following best describes your role in making purchasing decisions about Logistics services for your company?

48% of Google users' companies employ less than 250 people full-time, while 52% employ between 250 and 1000 people full-time



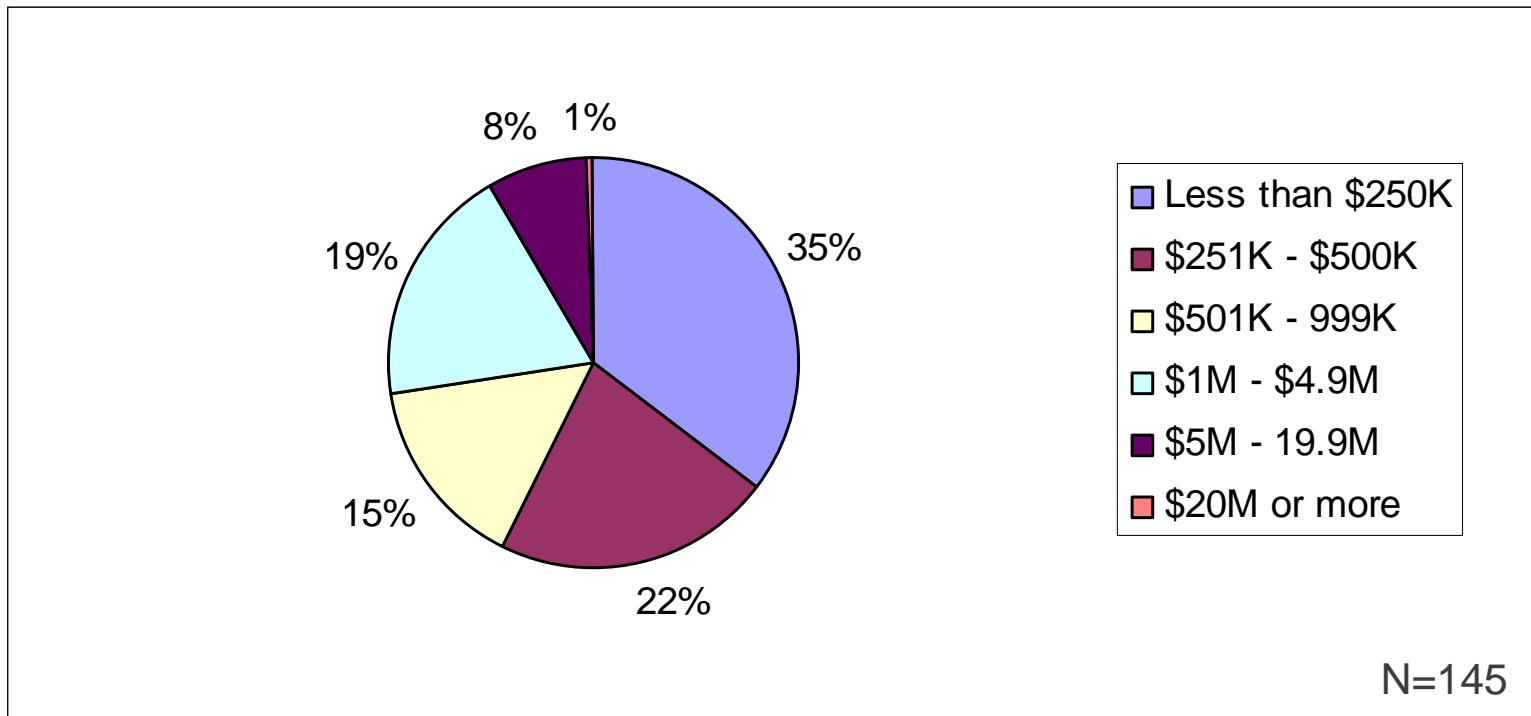
How many employees does your company employ full-time?

60% of Google users' companies earn revenue between \$10M and \$150M, and 40% have revenue of less than \$10M



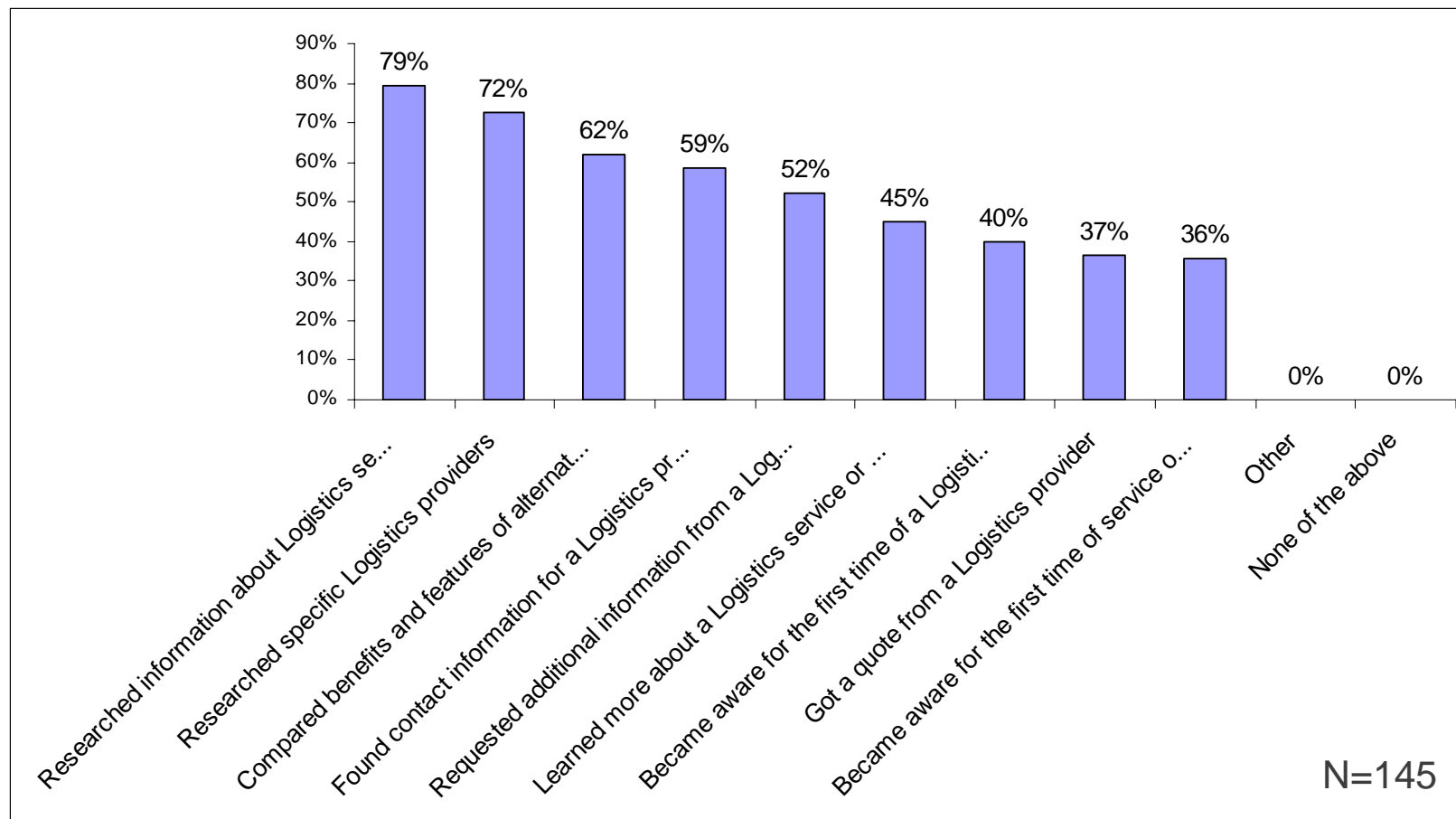
What was your company's total annual revenue?

64% of Google users' companies spend \$250K to \$20M on transportation services, equipment, and technology, while 35% spend less than \$250K



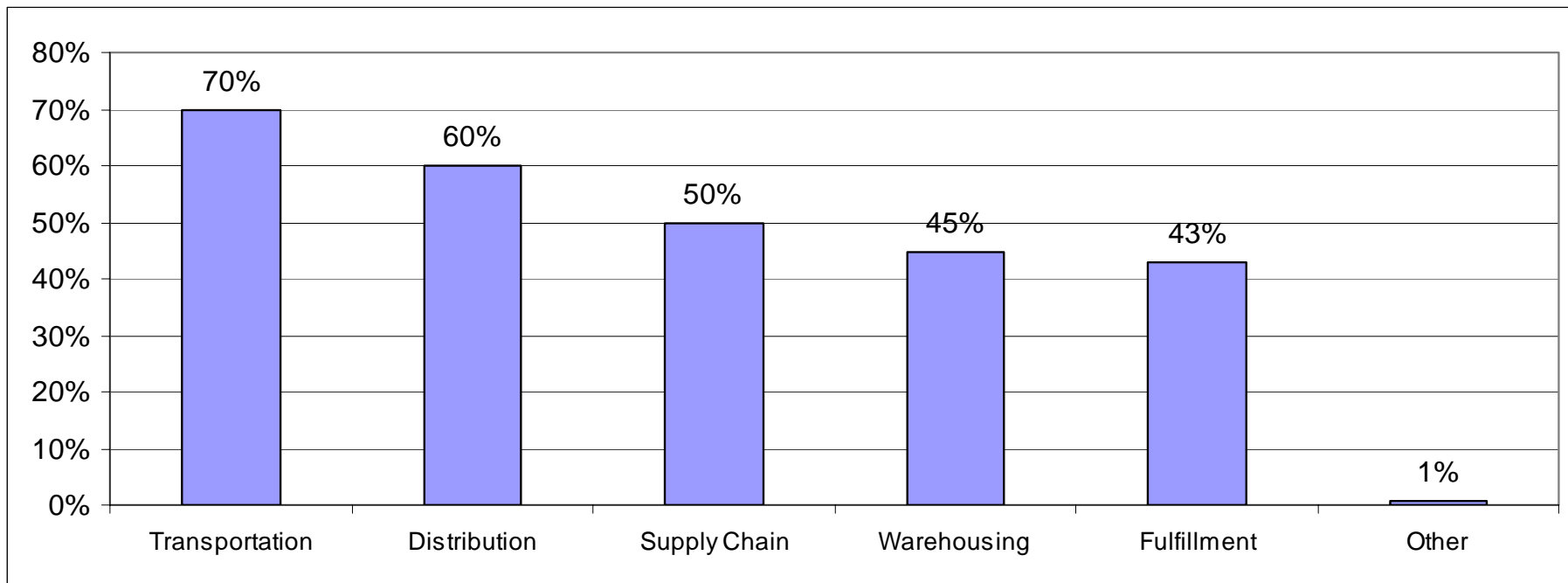
Approximately how much does your company spend annually on transportation services, equipment and technology?

79% of Google users have researched information about Logistics services, and 72% have researched specific Logistics providers



Which of the following activities have you done online? Select all that apply

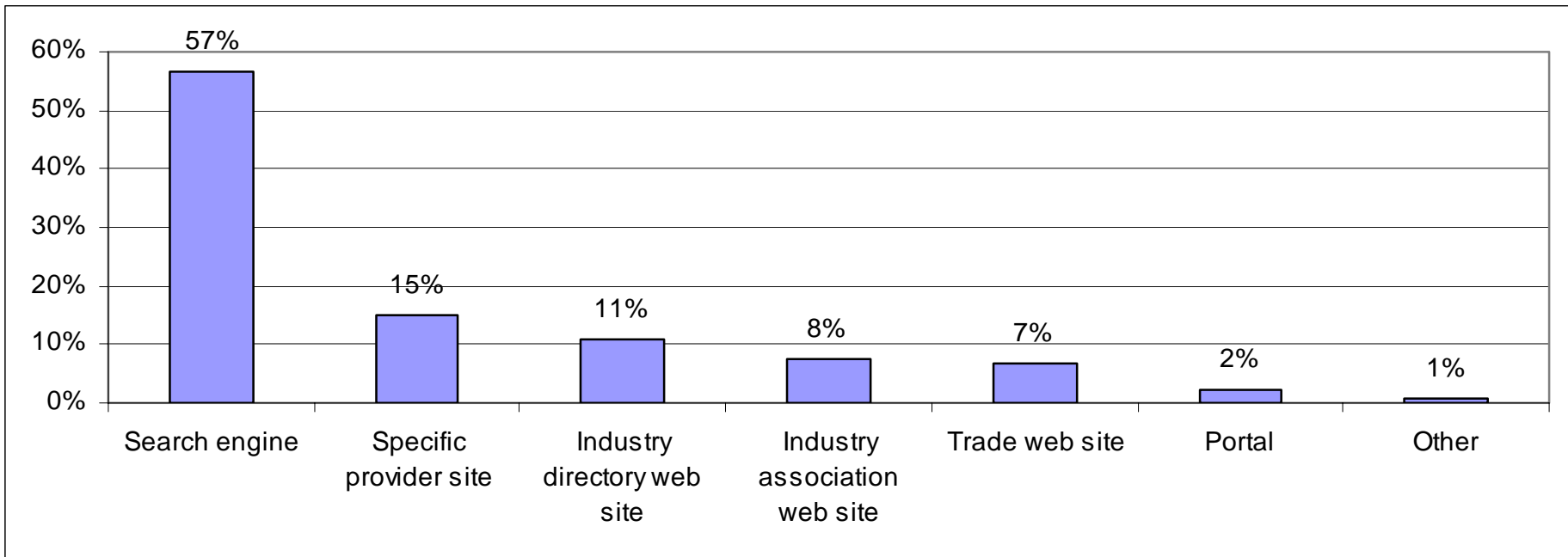
Of those Google users who have researched Logistics information and/or providers online, 70% researched Transportation, and 60% researched Distribution



N=145

You indicated that you researched Logistics information and/or providers online. For which of the following services have you researched Logistics information and/or providers? Select all that apply

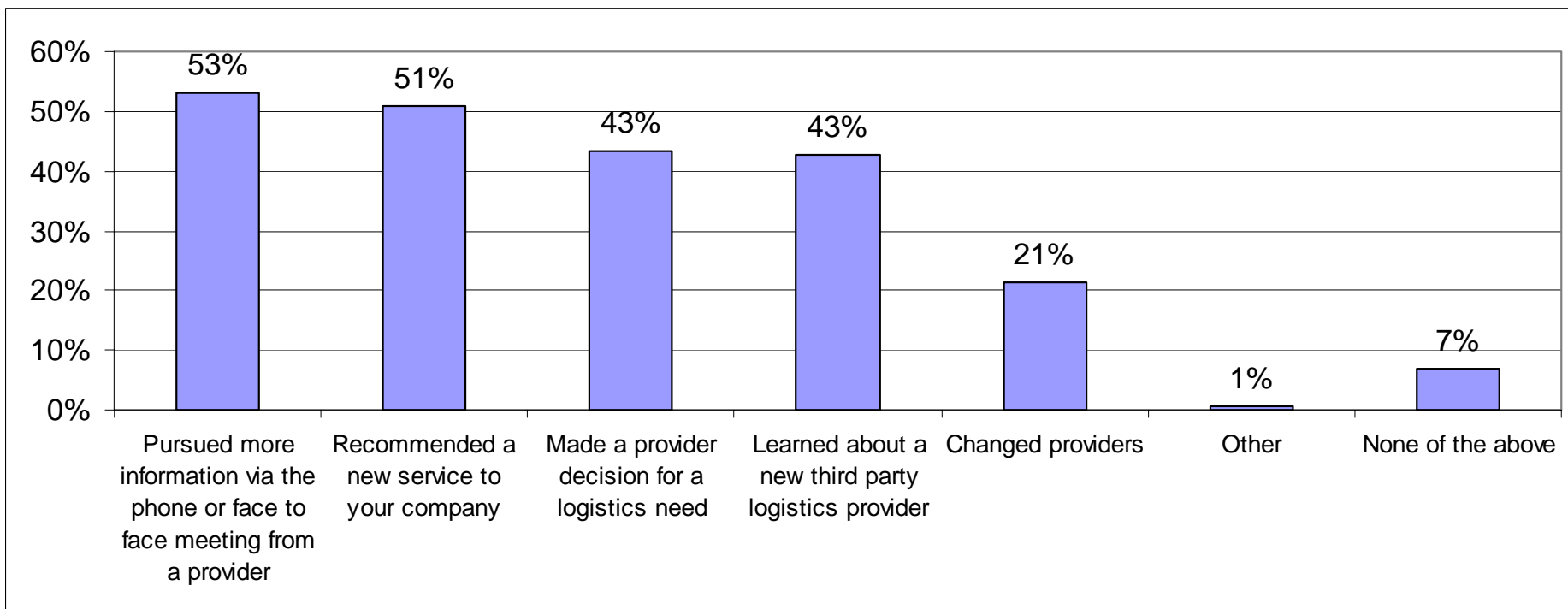
57% of Google users who research Logistics information and/or source Logistics providers online start by using a search engine



N=145

When you go online to research Logistics information and/or source Logistics providers, where do you usually START?

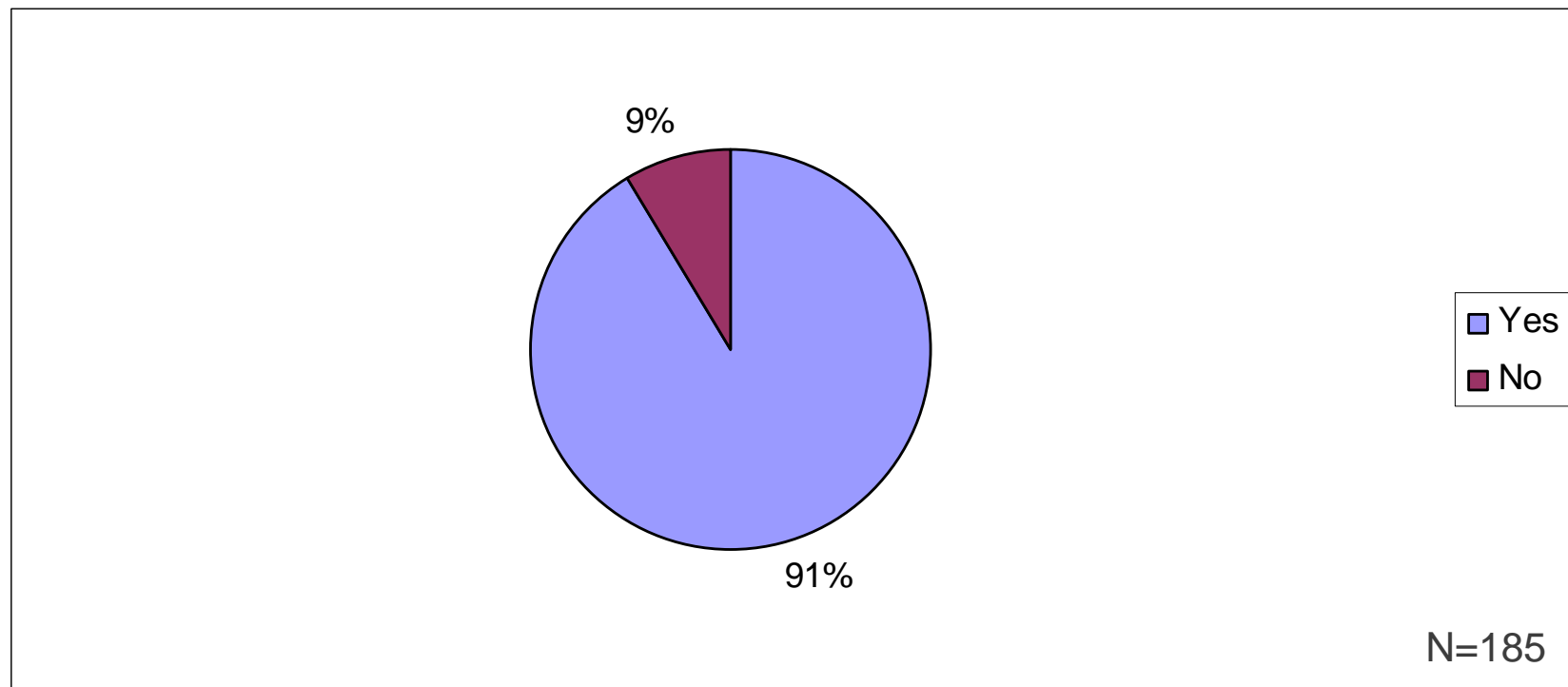
After researching Logistics information and/or sourcing providers online, 53% of those Google users have pursued more information via phone or face to face meeting



N=145

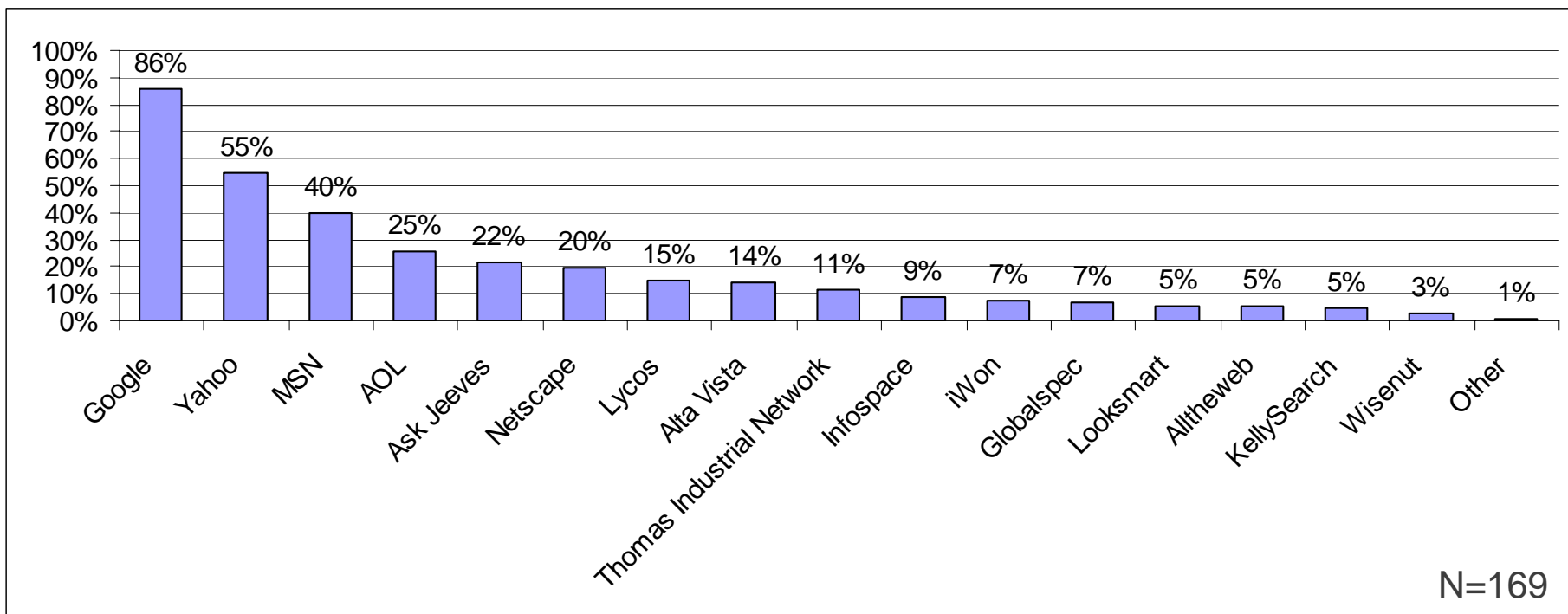
Have you done any of the following after researching Logistics information and/or sourcing Logistics providers online? Select all that apply

91% of respondents have used a search engine to research Logistics information and/or providers online



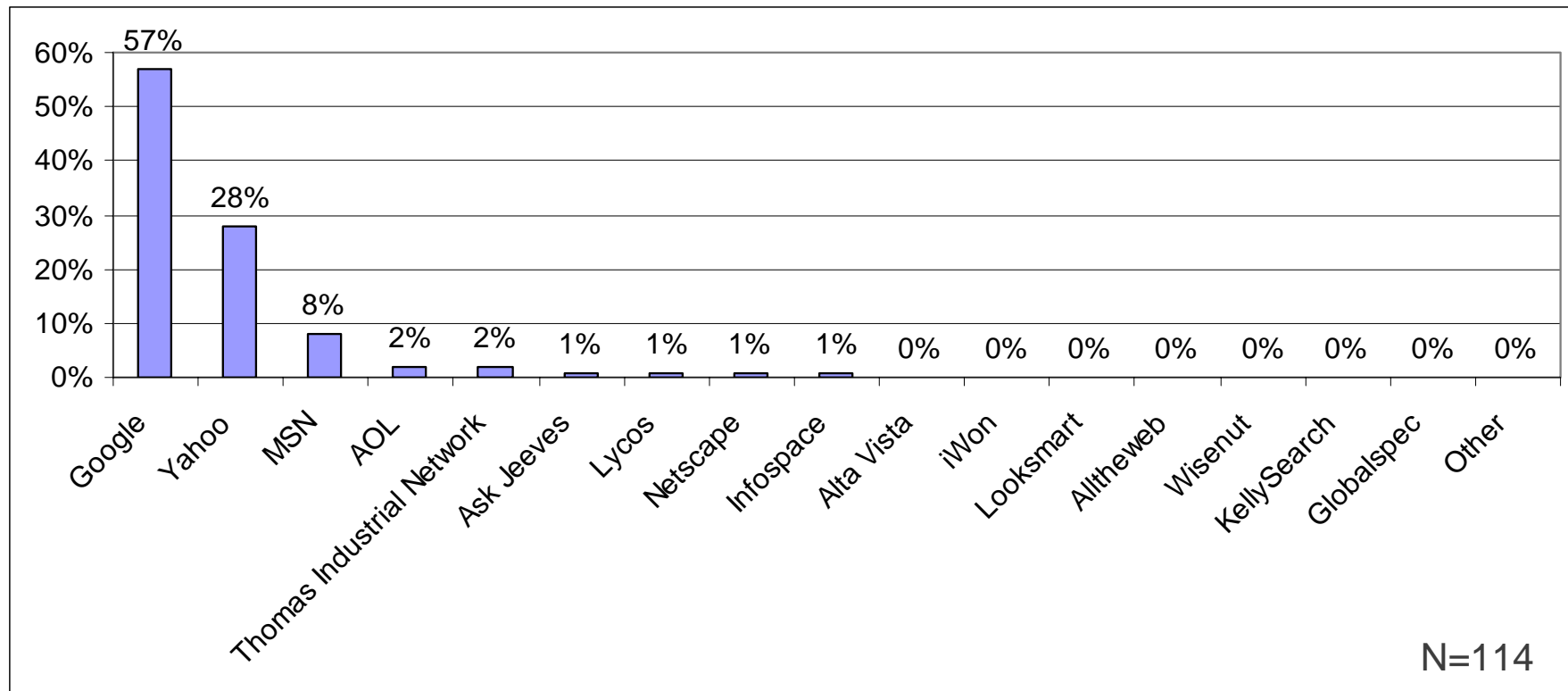
Do you ever use a search engine when you research Logistics information and/or providers online?

Google is the most popular among all respondents using a search engine for researching Logistics information and/or sourcing Logistics providers



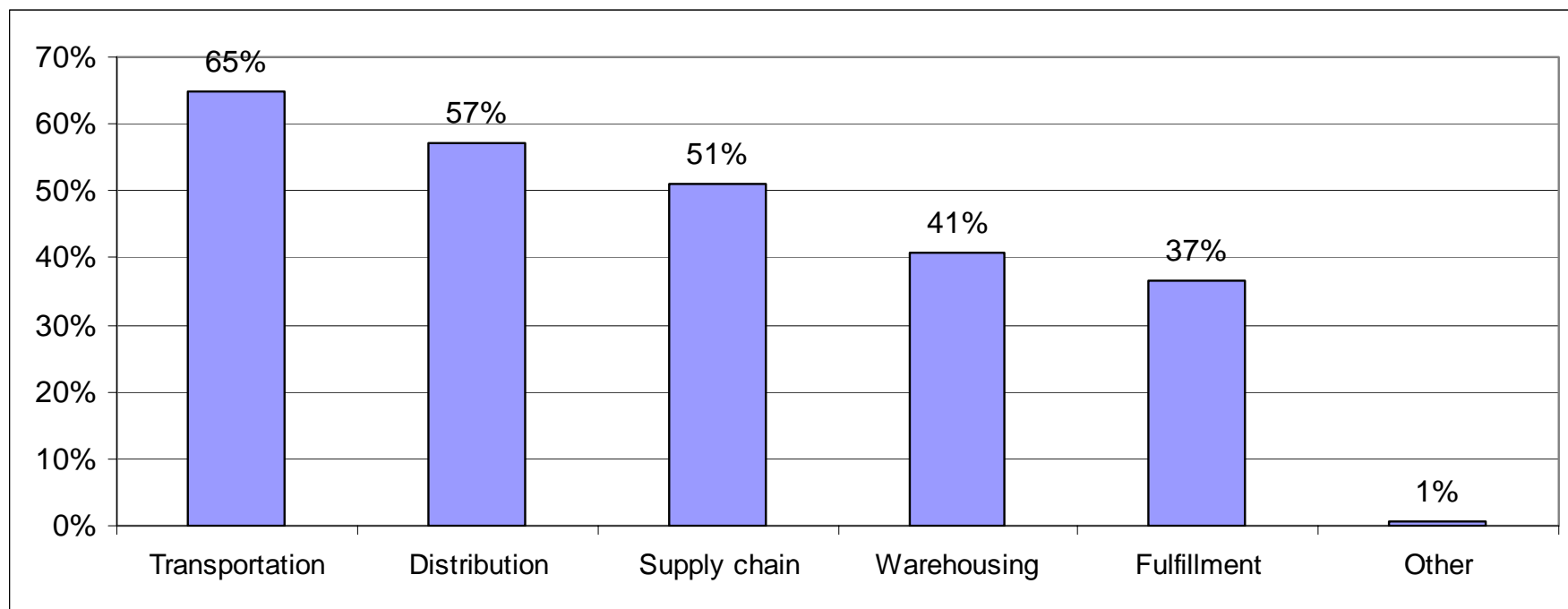
Which of the following search engines have you used to research Logistics information and/or sourcing Logistics providers online?

Of Google users who use more than one search engine, 57% use Google most often for researching Logistics information and/or sourcing providers



Which of the following search engines do you use MOST OFTEN to research Logistics information and/or source Logistics providers online?

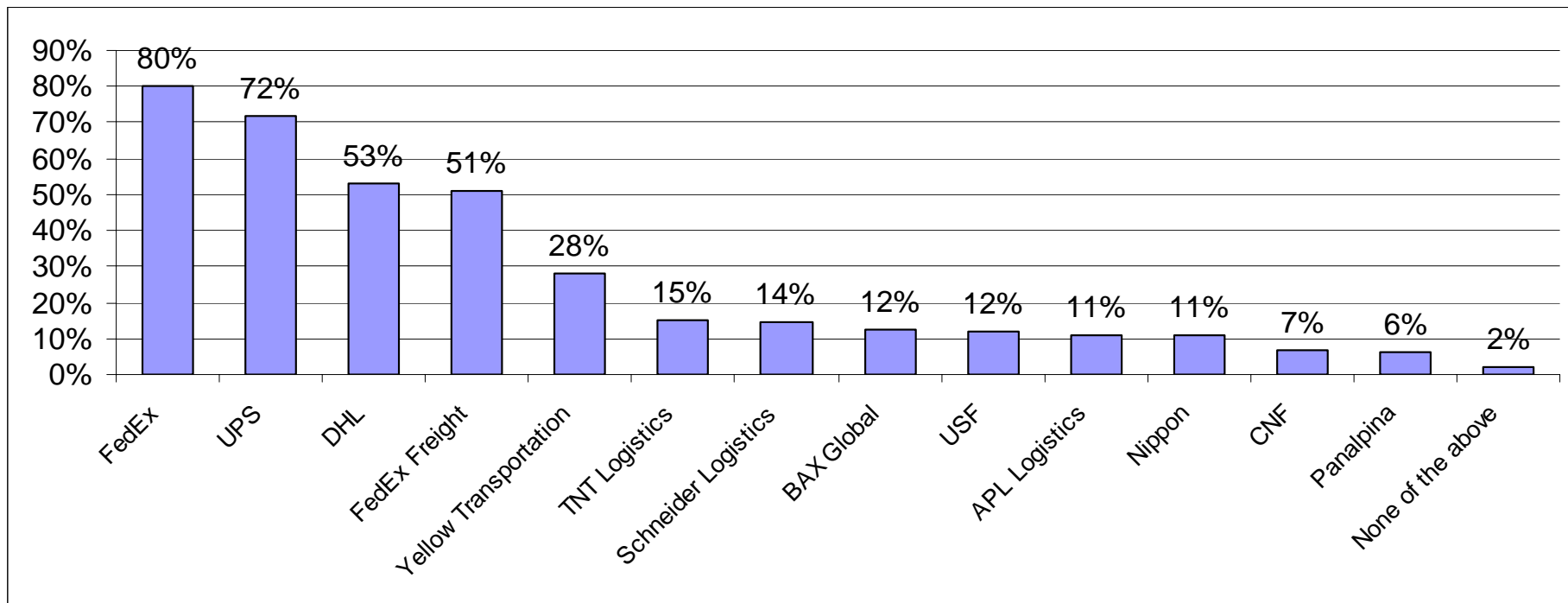
Of Google users who use a search engine to research Logistics services, 65% used a search engine for Transportation and 57% for Distribution



N=145

For which of the following types of Logistics services have you used a search engine to help you research information and/or providers? Select all that apply

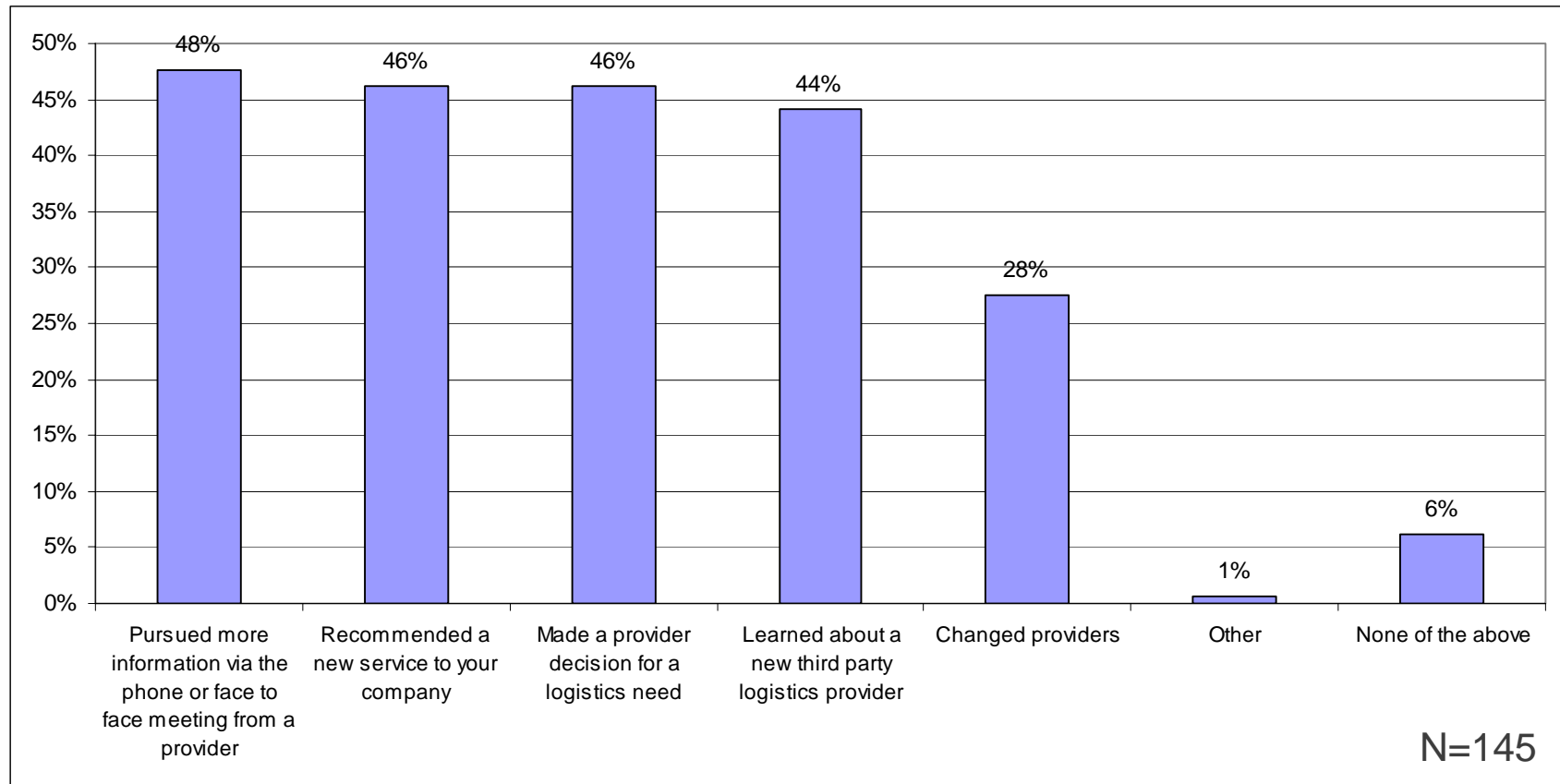
Of Google users who use a search engine to research Logistics services, **80% used a search engine to find FedEx and 72% to find UPS**



N=145

For which of the following companies, if any, have you ever used a search engine to help you find information? Select all that apply

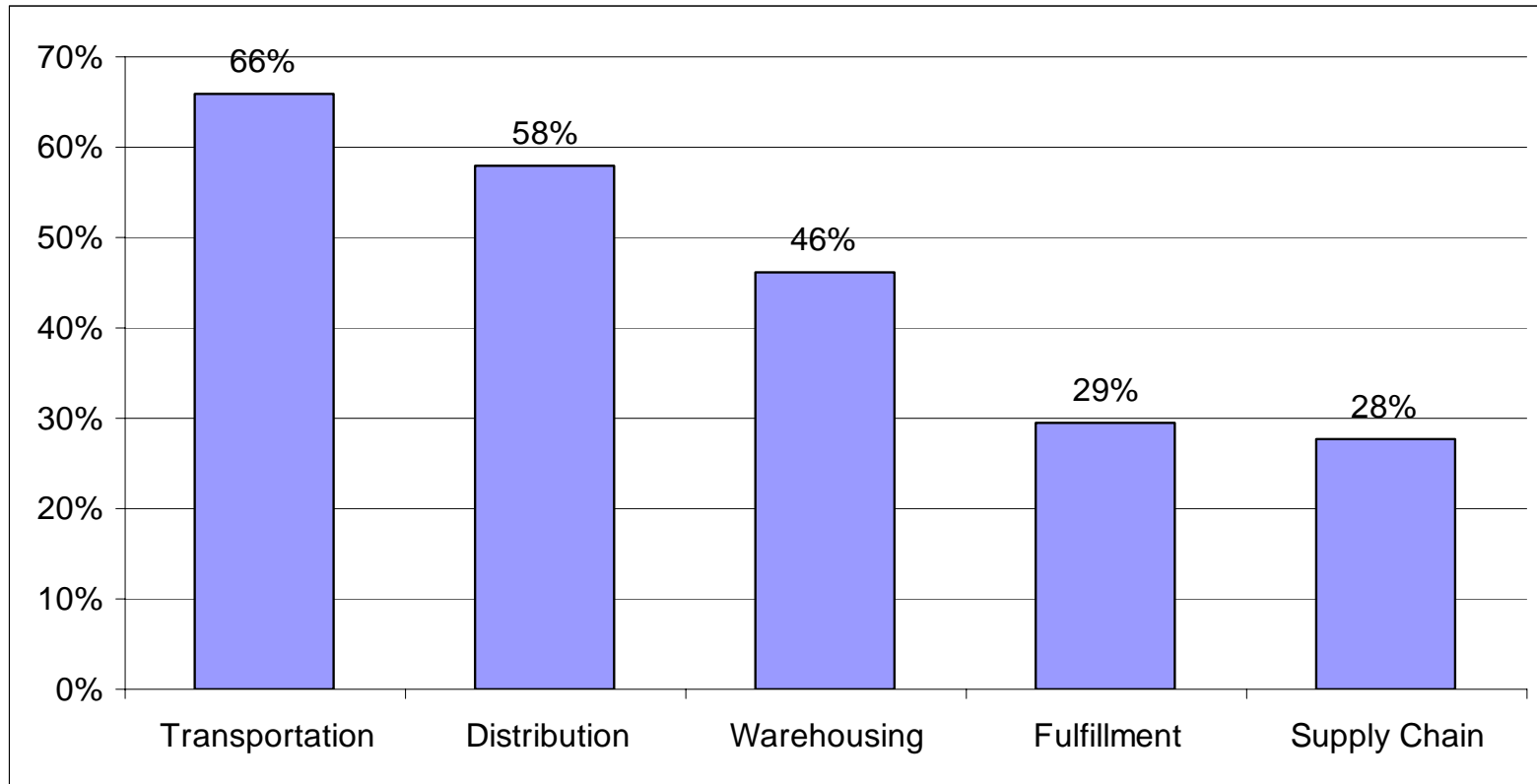
After using a search engine to help research Logistics services, 48% of those Google users pursued more information offline via phone or face to face meeting



Have you done any of the following after using a search engine to help research Logistics information and/or providers? Select all that apply

Source: 2005 Logistics Survey, conducted by Media-Screen and GMI (April 2005)

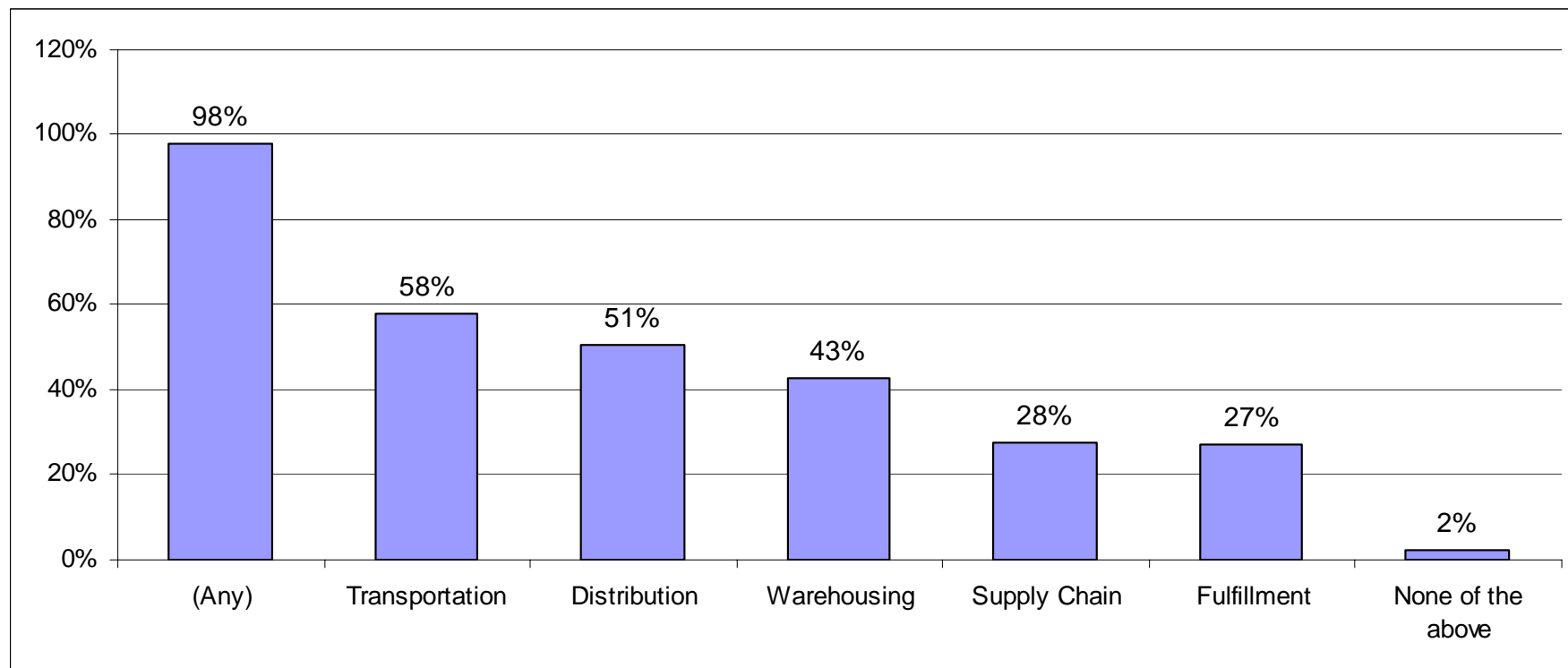
Of those Google users planning to research Logistics in the next 12 months, 66% plan to research Transportation and 58% to research Distribution



N=126

You indicated you plan to research Logistics information in the next 12 months. For which of the following Logistics services do you plan to research information in the next 12 months? Select all that apply

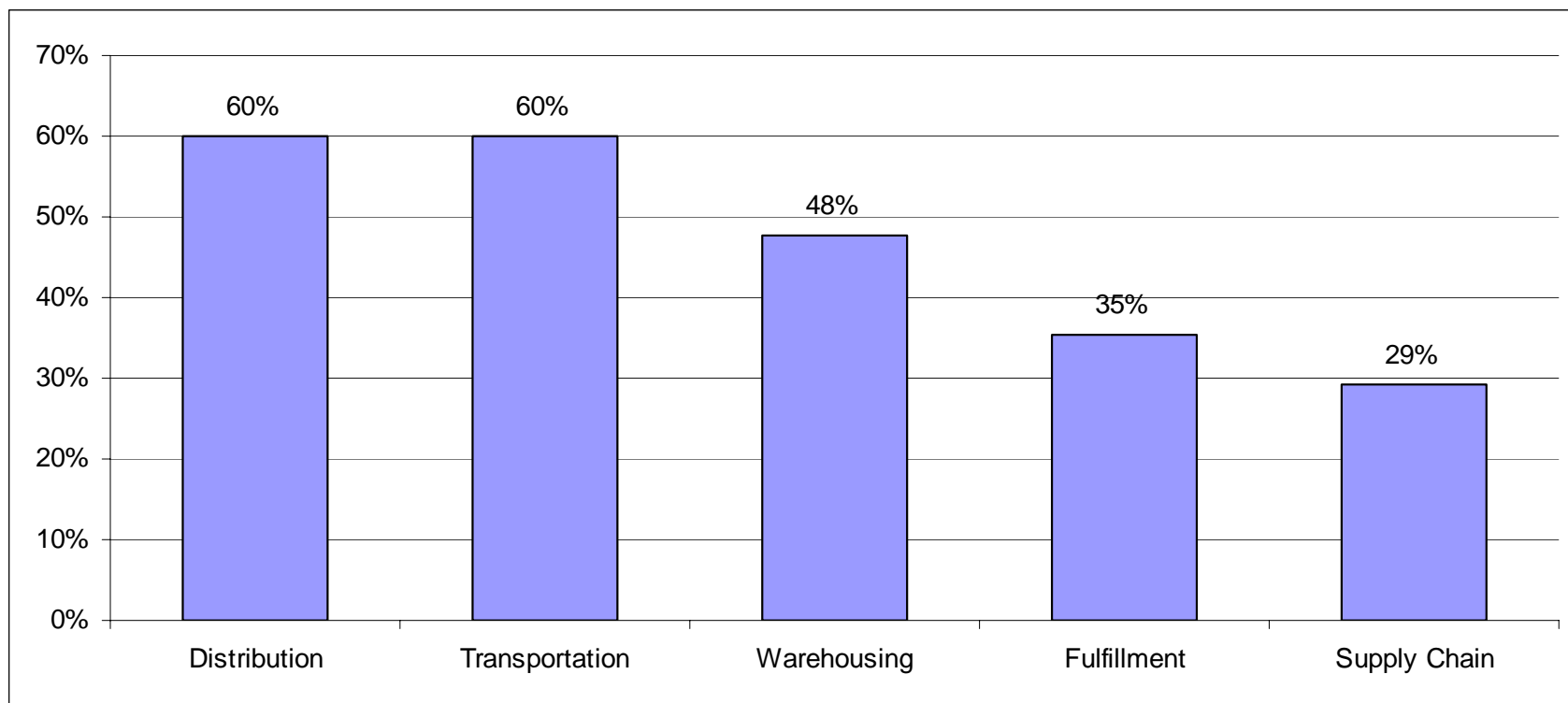
98% of those Google users who plan to research Logistics services in the next 12 months say they think they will use a search engine to help them



N=126

You indicated that you plan to research information on the following Logistics services in the next 12 months. Do you think you will use a search engine to help you research information for any of these services? Please indicate which services you think you will use a search engine to help you research. Select all that apply.

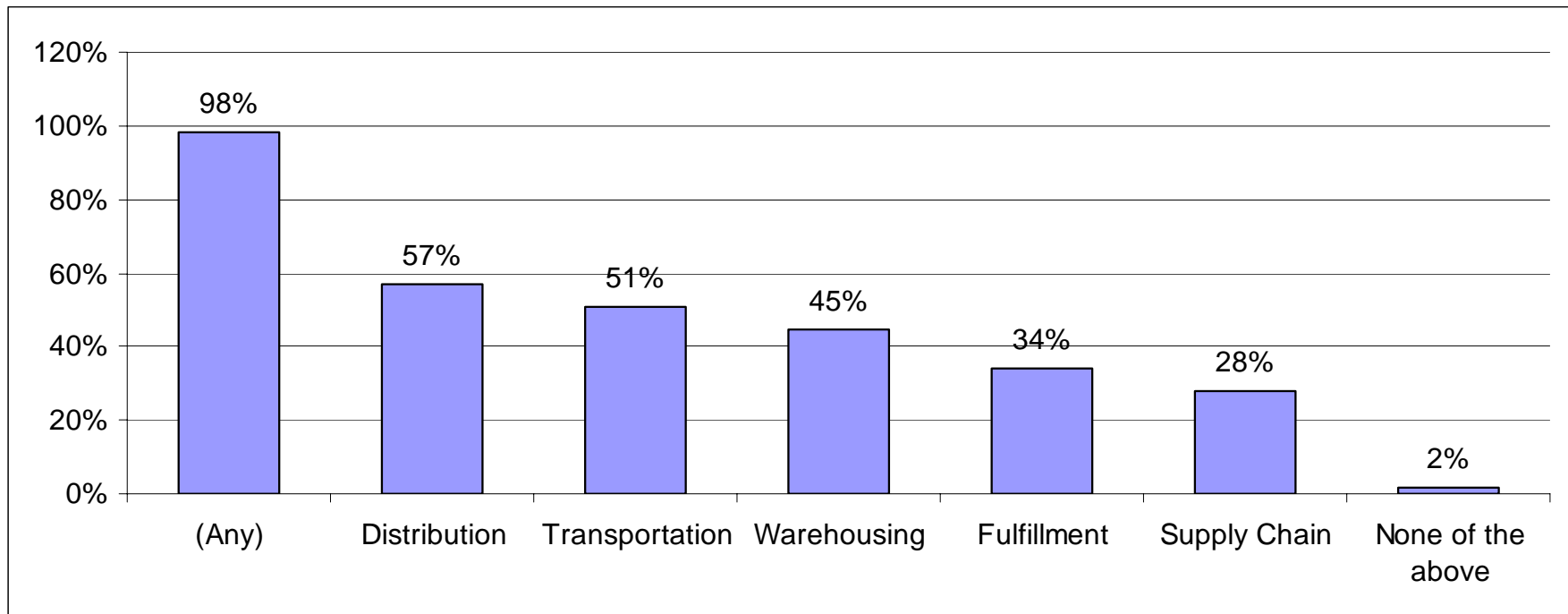
Of those Google users planning to source Logistics providers in the next 12 months, 60% plan to source Distribution and 60% to source Transportation



N=65

You indicated that you plan to source Logistics providers in the next 12 months. For which of the following Logistics services do you plan to source providers for in the next 12 months? Select all that apply

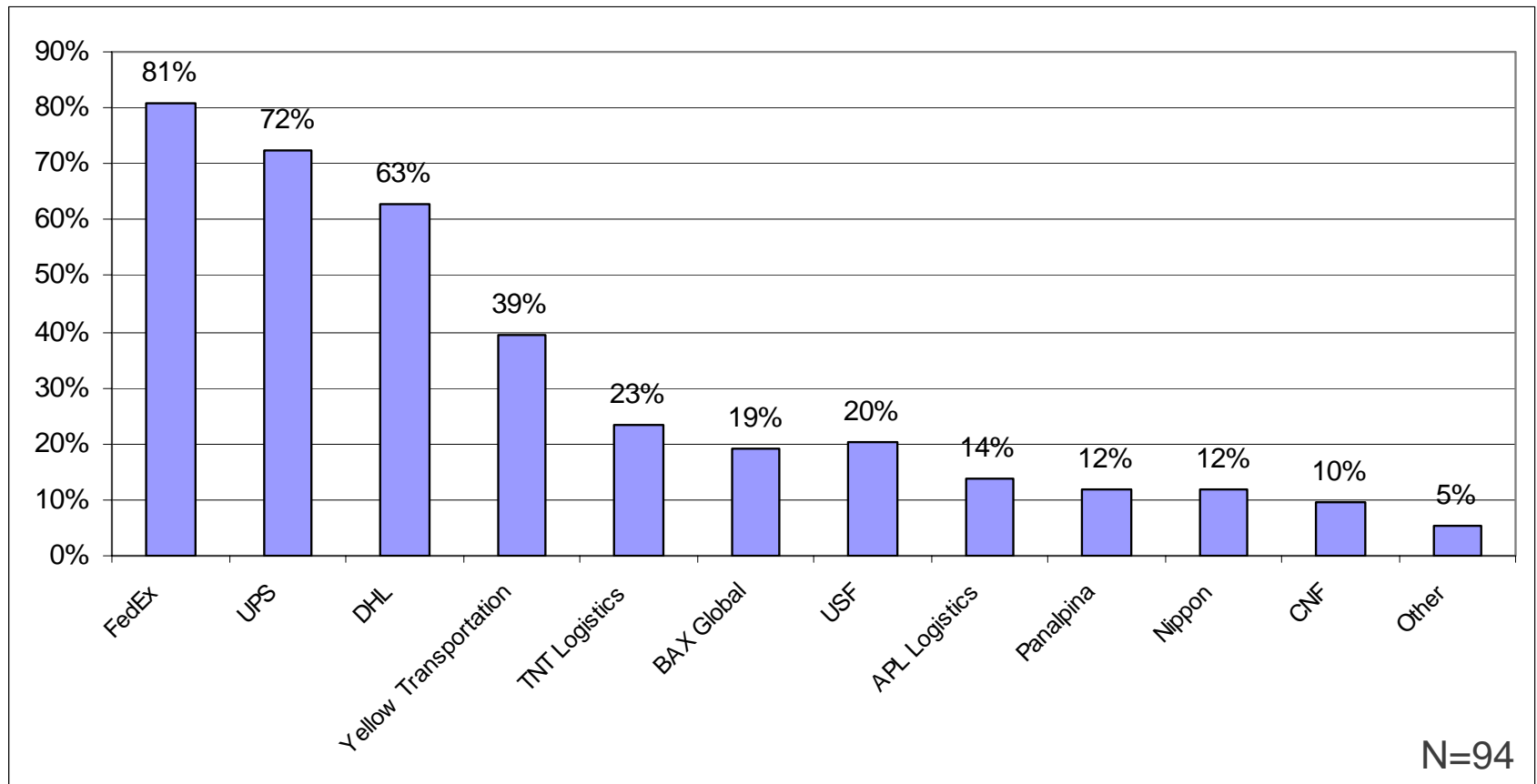
98% of those Google users who plan to source a Logistics provider in the next 12 months say they think they will use a search engine to help them



N=65

You indicated that you plan to source providers for the following Logistics services in the next 12 months. Do you think you will use a search engine to help you research information for any of these services? Please indicate which services you think you will use a search engine to help you research. Select all that apply

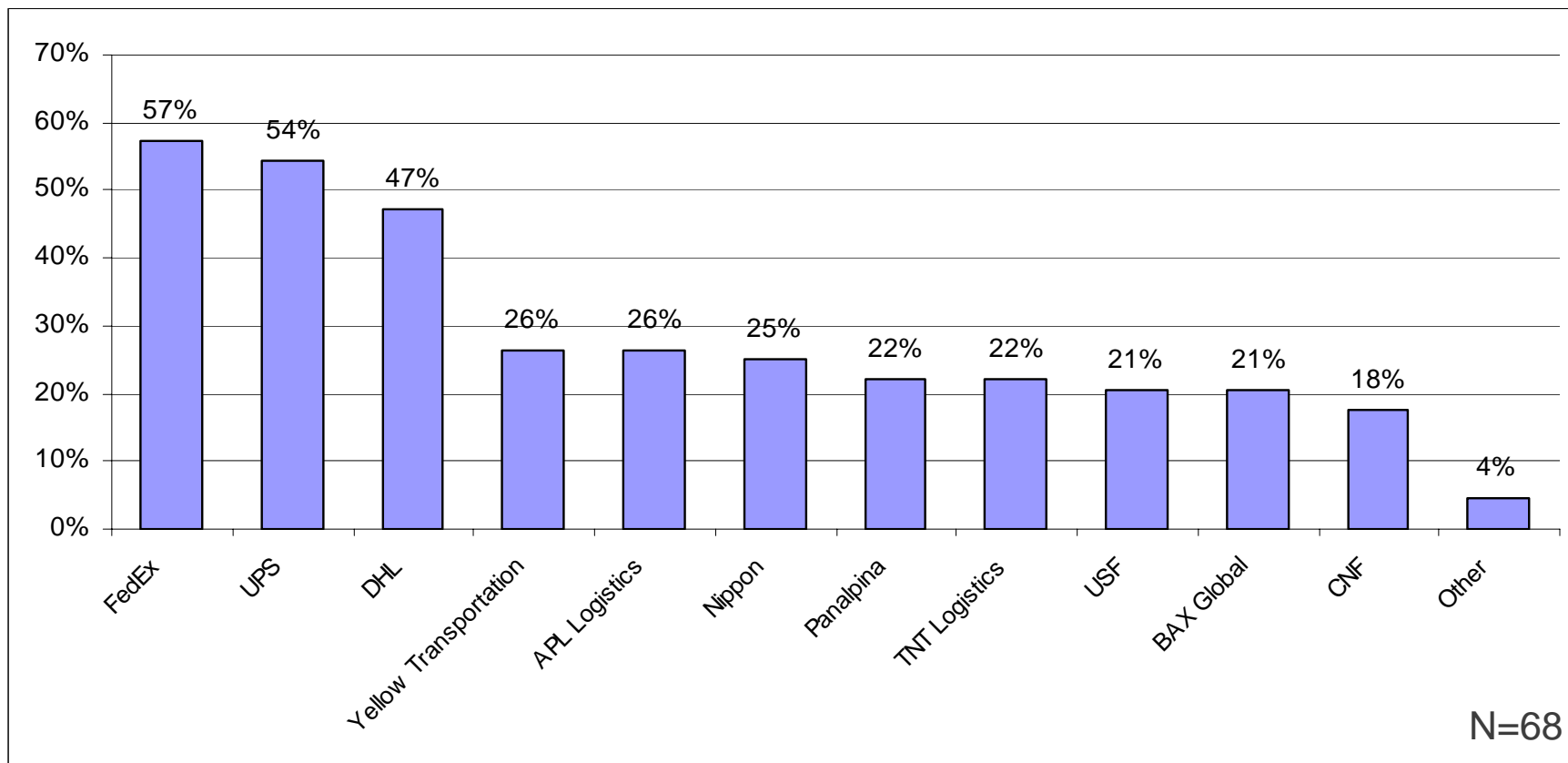
Of Google users planning to research or source Transportation providers in the next 12 months, 81% plan to evaluate FedEx and 72% to evaluate UPS



You indicated you would be seeking information and/or sourcing providers on Transportation services in the next 12 months. Which of the following companies if any do you intend to evaluate for these services? Select all that apply

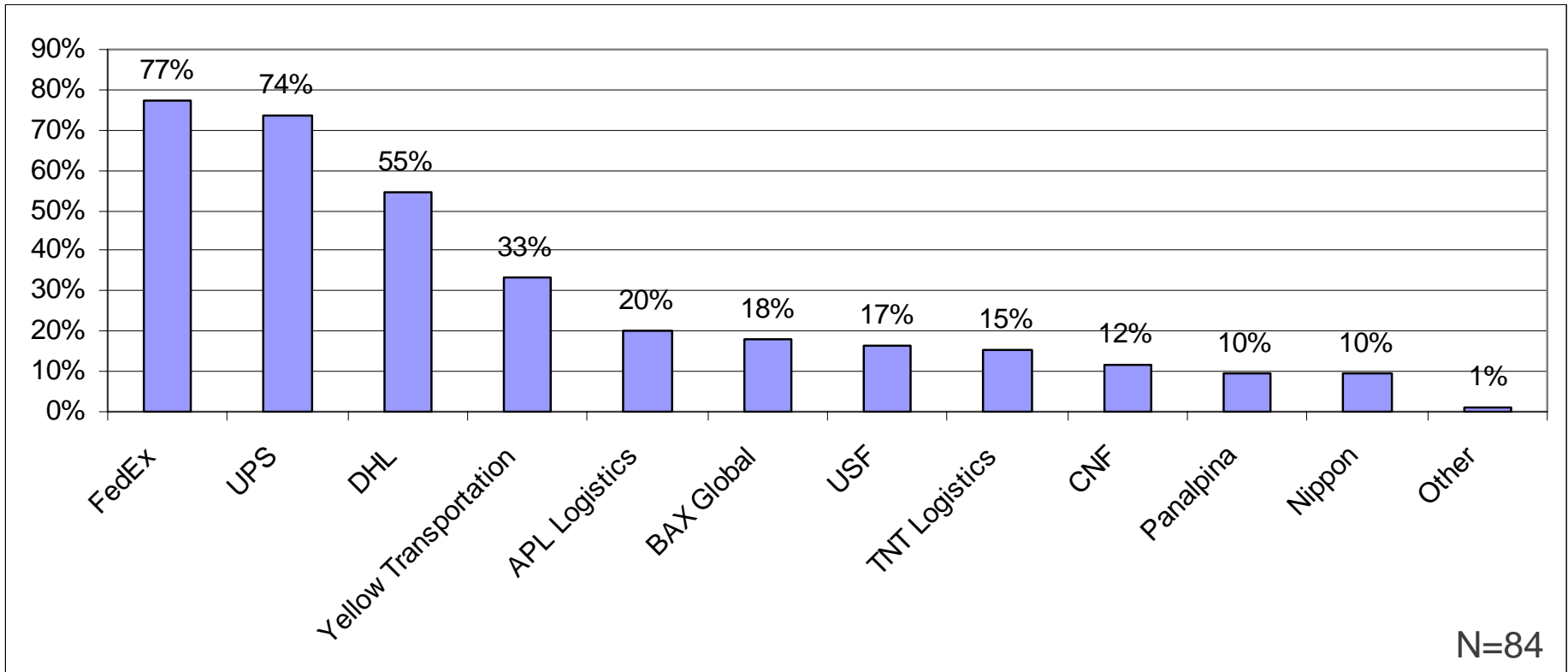
Source: 2005 Logistics Survey, conducted by Media-Screen and GMI (April 2005)

Of Google users planning to research or source Warehousing providers in the next 12 months, 57% plan to evaluate FedEx and 54% to evaluate UPS



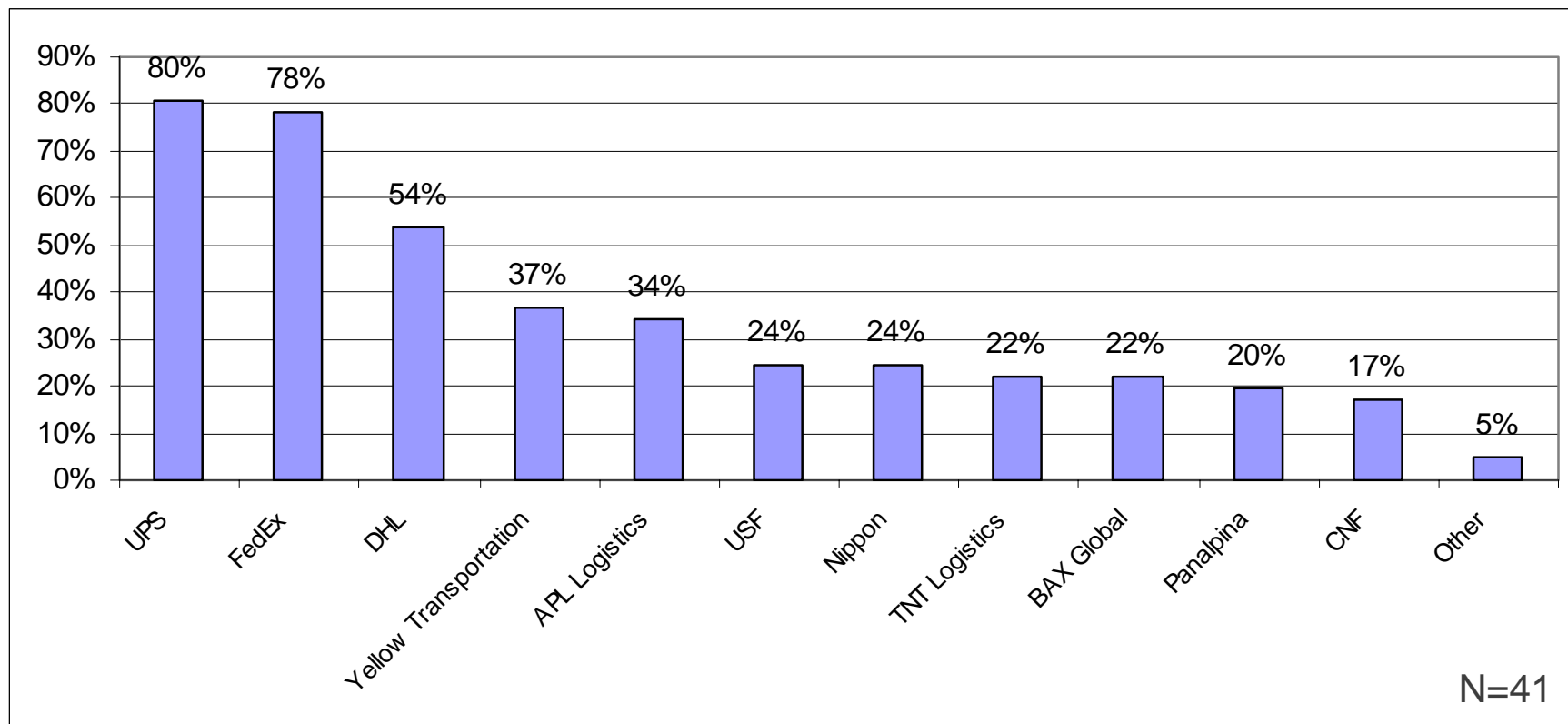
You indicated you would be seeking information and/or sourcing providers on Warehousing services in the next 12 months. Which of the following companies do you intend to evaluate for these services? Select all that apply

Of Google users planning to research or source Distribution providers in the next 12 months, 77% plan to evaluate FedEx and 74% to evaluate UPS



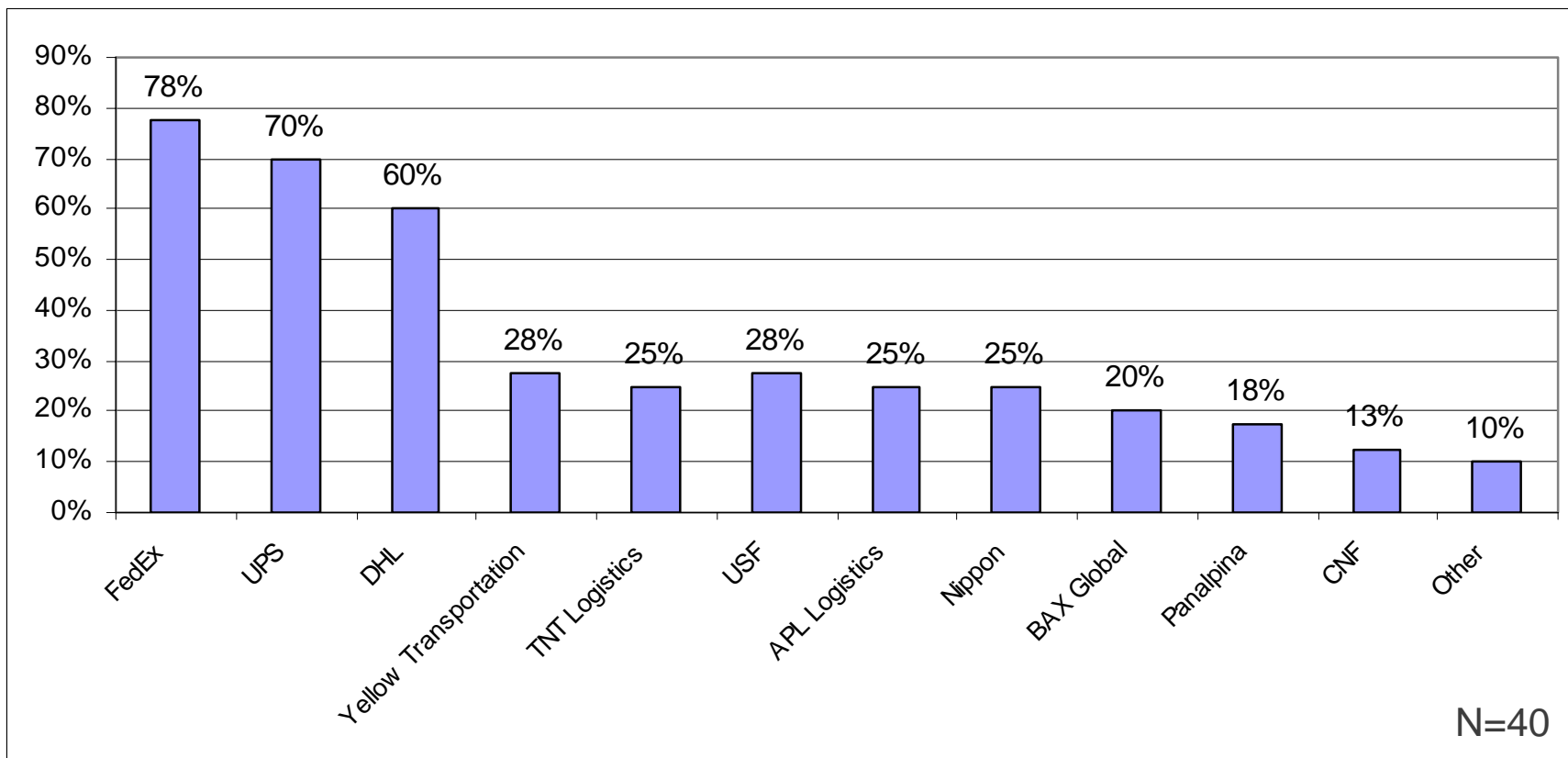
You indicated you would be seeking information and/or sourcing providers on Distribution services in the next 12 months. Which of the following companies do you intend to evaluate for these services? Select all that apply

Of Google users planning to research or source Fulfillment providers in the next 12 months, 80% plan to evaluate UPS and 78% to evaluate FedEx



You indicated you would be seeking information and/or sourcing providers on Fulfillment services in the next 12 months. Which of the following companies do you intend to evaluate for these services? Select all that apply

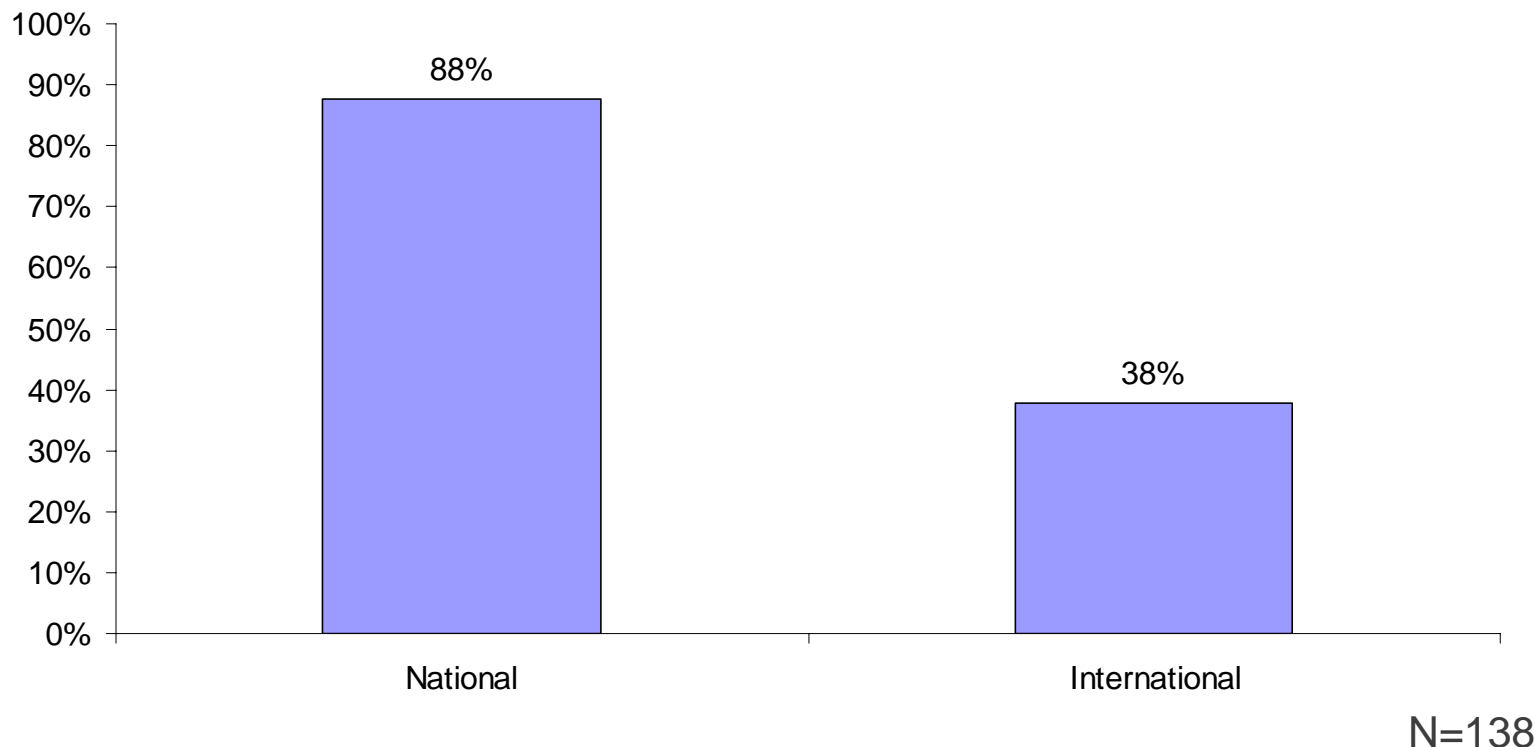
Of Google users planning to research or source Supply Chain providers in the next 12 months, 78% plan to evaluate FedEx and 70% to evaluate UPS



You indicated you would be seeking information and/or sourcing providers on Supply Chain services in the next 12 months. Which of the following companies do you intend to evaluate for these services? Select all that apply

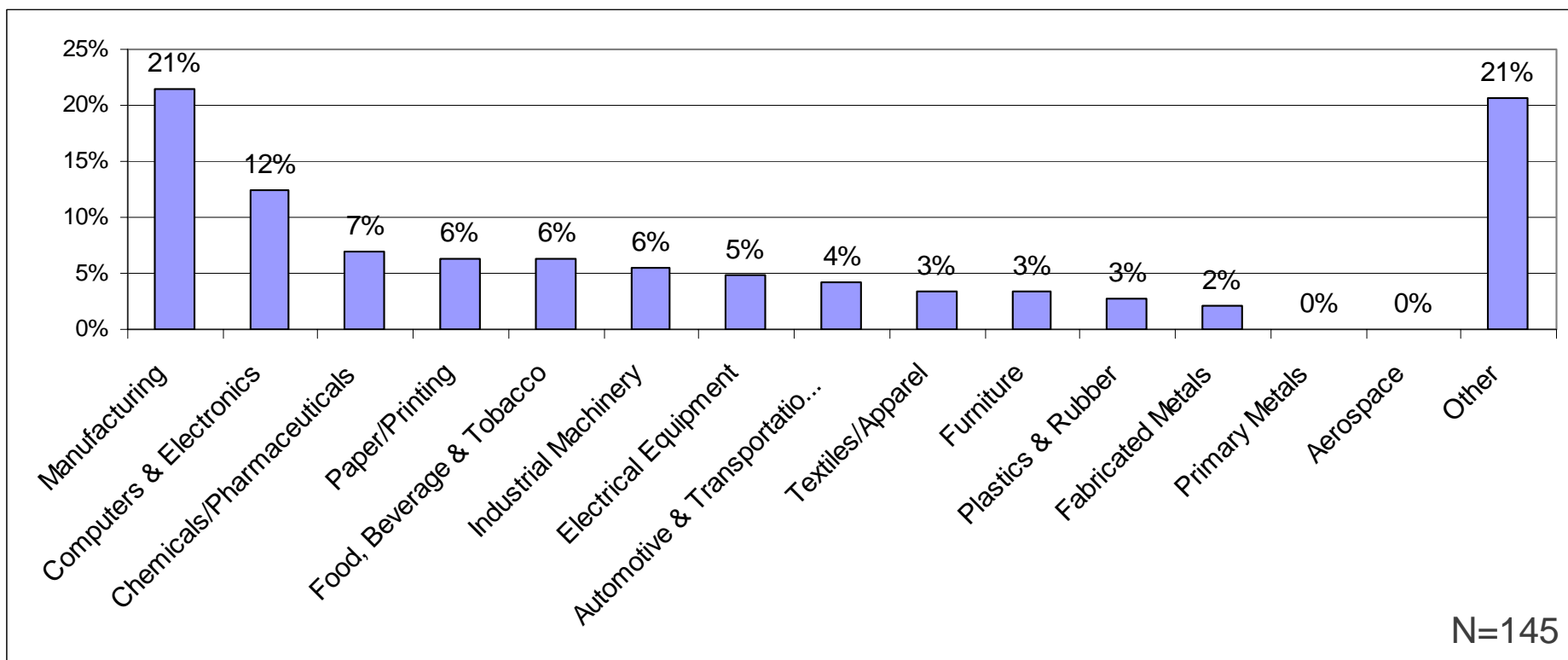
Source: 2005 Logistics Survey, conducted by Media-Screen and GMI (April 2005)

Of Google users seeking information on Transportation and/or Supply Chain, 88% have needs that are national in scope and 39% are international



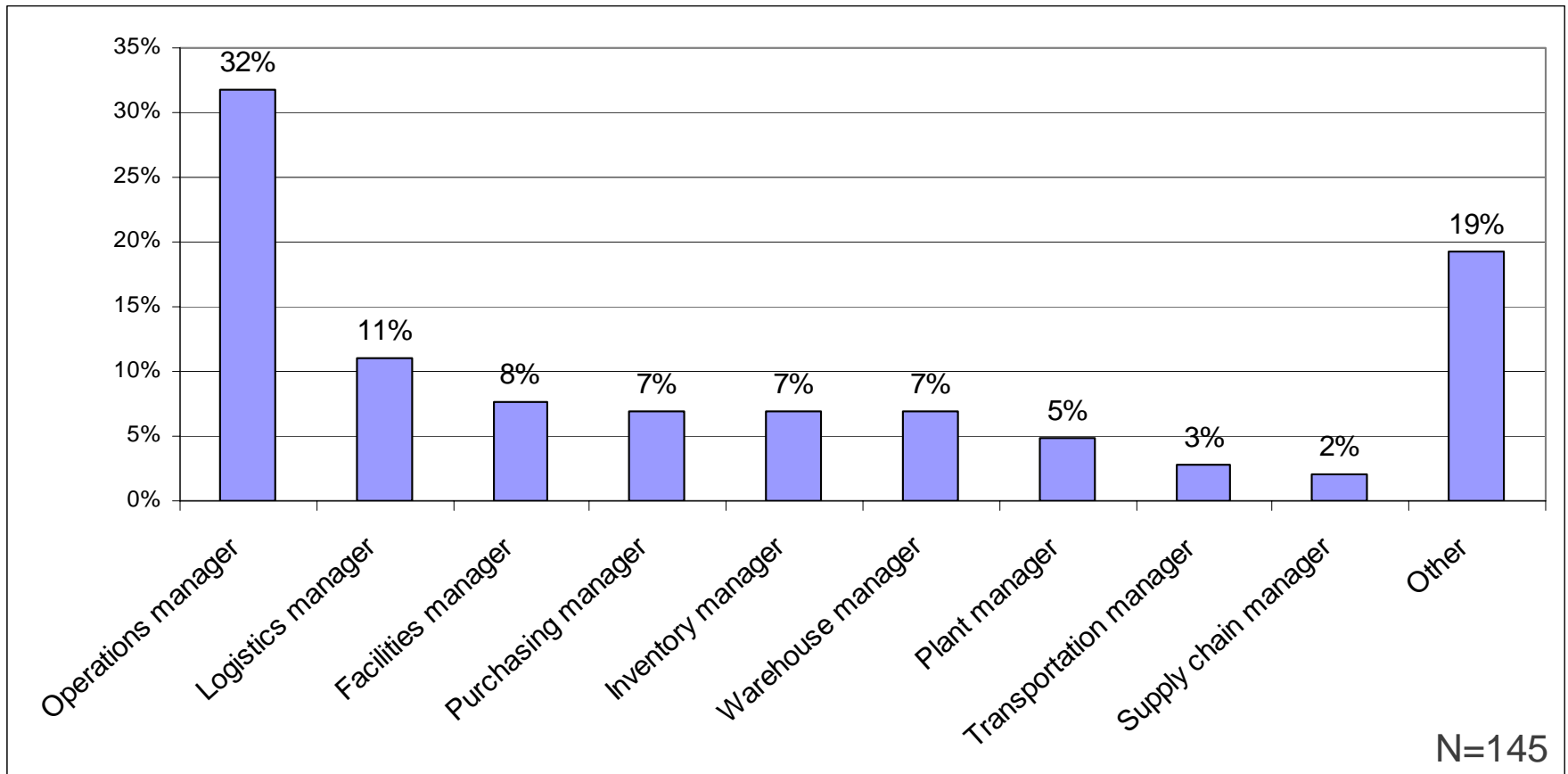
Are your transportation and/or supply chain needs national or international in scope? Please select all that apply

21% of Google users reported their primary business is Manufacturing and 12% stated that it is Computers and Electronics



Which of the following best describes the primary business at this location?

32% of Google users reported their job title is Operations Manager, 11% Logistics Manager, and 19% specified “Other”, including Owner/CEO



Which of the following best describes your job title?