

## **We surveyed a total of 301 US businesses that use the web to research Professional Services**

- A custom survey instrument (i.e. questionnaire) was developed to measure respondents' use of the web, and search engines in particular, for researching Professional Services
- Our sample is representative of small, medium and large-sized businesses (500+ employees)
- The survey was conducted online, through a web-based interviewing process, in March 2005
- Respondents are 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 Global Market Insite (GMI), a global sampling and data collection company, and Media-Screen, an independent strategic market research firm

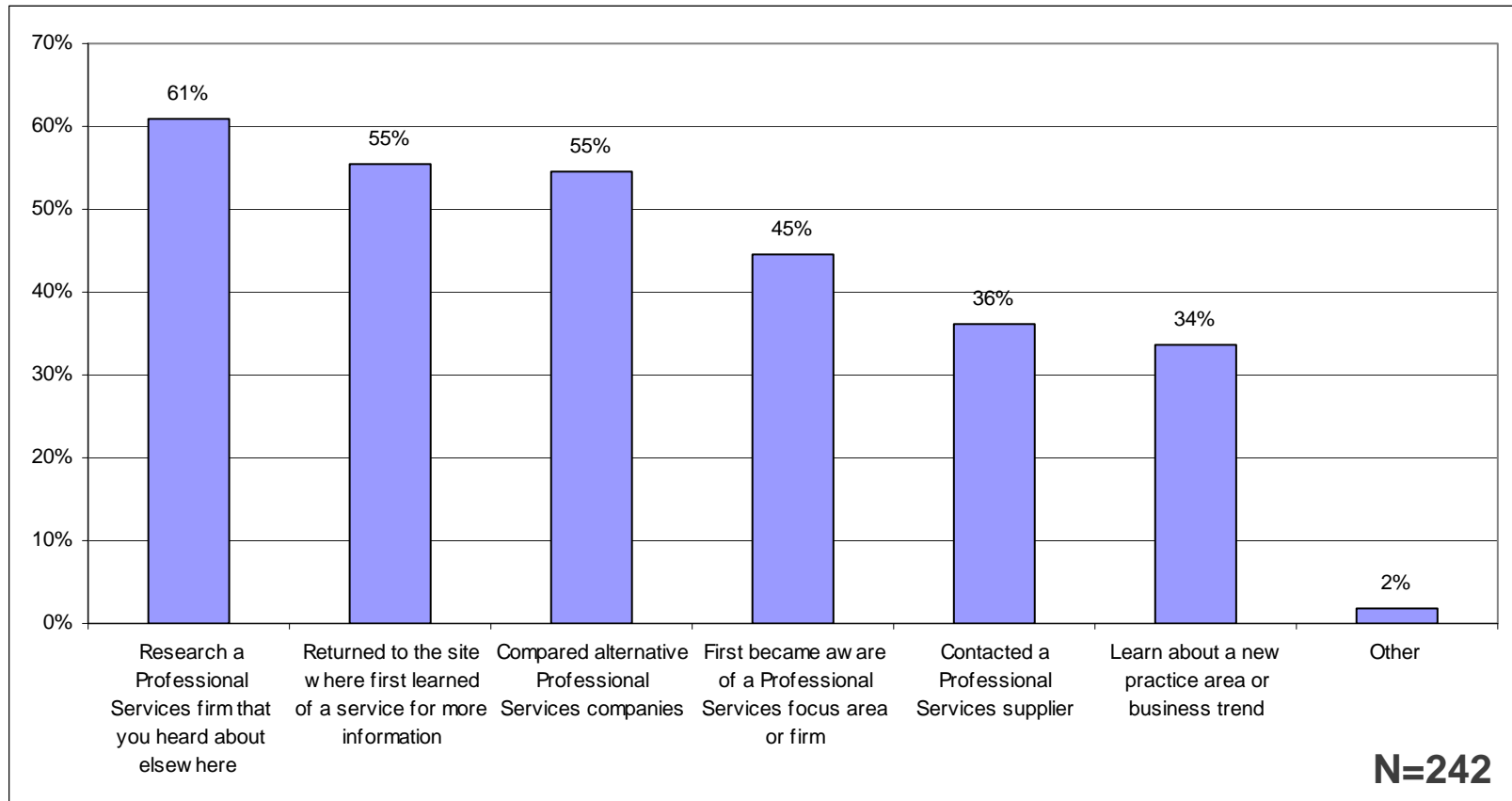
## Executive Summary

- 61% of Google users go **online to research or learn** about a Professional Service firm that they heard about elsewhere
- 82% of respondents **use Google** to search for these products
- 93% of Google users report that a search engine is very/somewhat important in helping to get information and/or identify a Professional Services supplier and 44% that **sponsored links** are very/somewhat helpful

### Search Behavior:

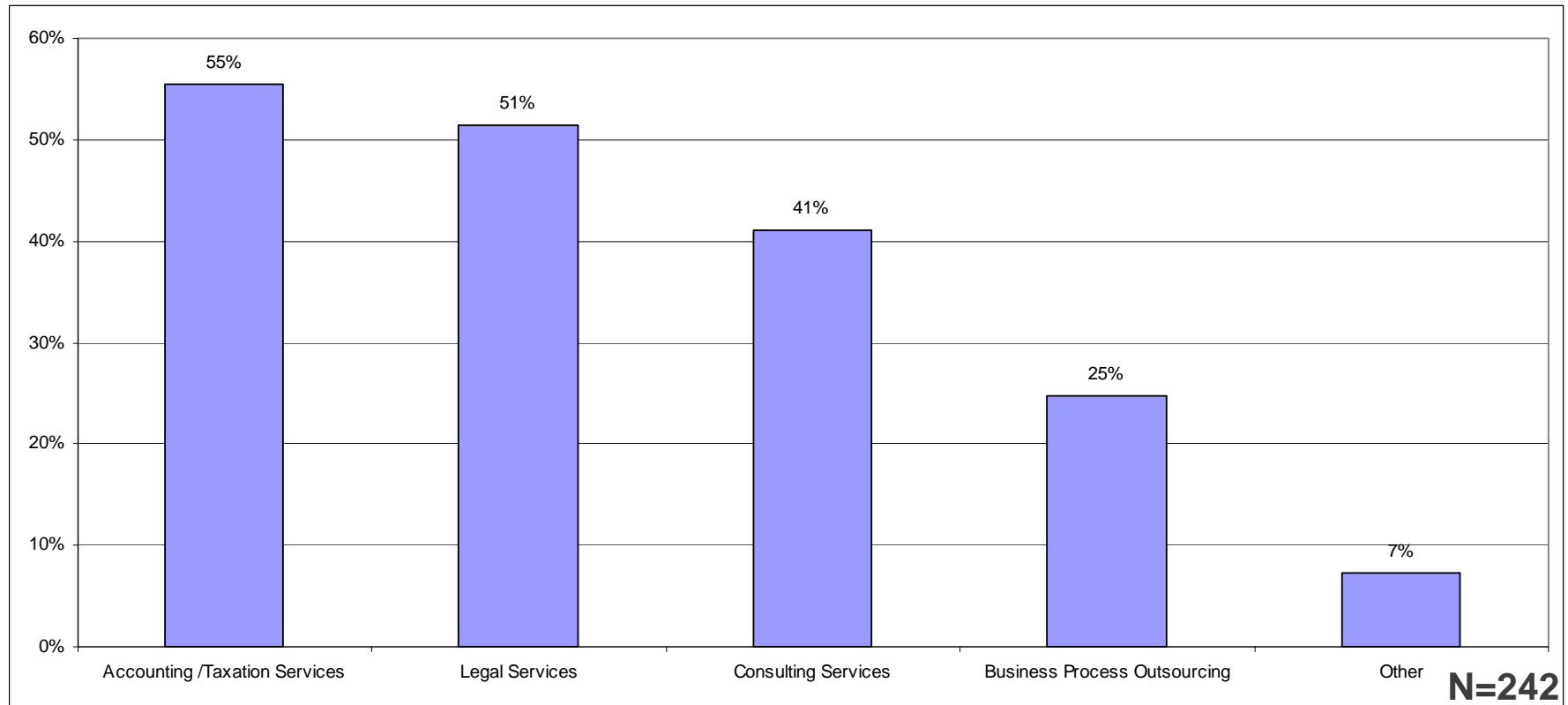
- 78% of Google users **find contact information** for professional services online and 74% **request more information**
- 71% of Google users use a search engine to **become aware and learn more** about a Professional Services field or firm.
- 67% of Google users **requested more information** after using a search engine
- 76% of Google users have **registered when requesting more information** and 45% of Google users have **registered to download information or reports**

## The majority (61%) of Google users go online to research or learn about a Professional Service firm that they heard about elsewhere



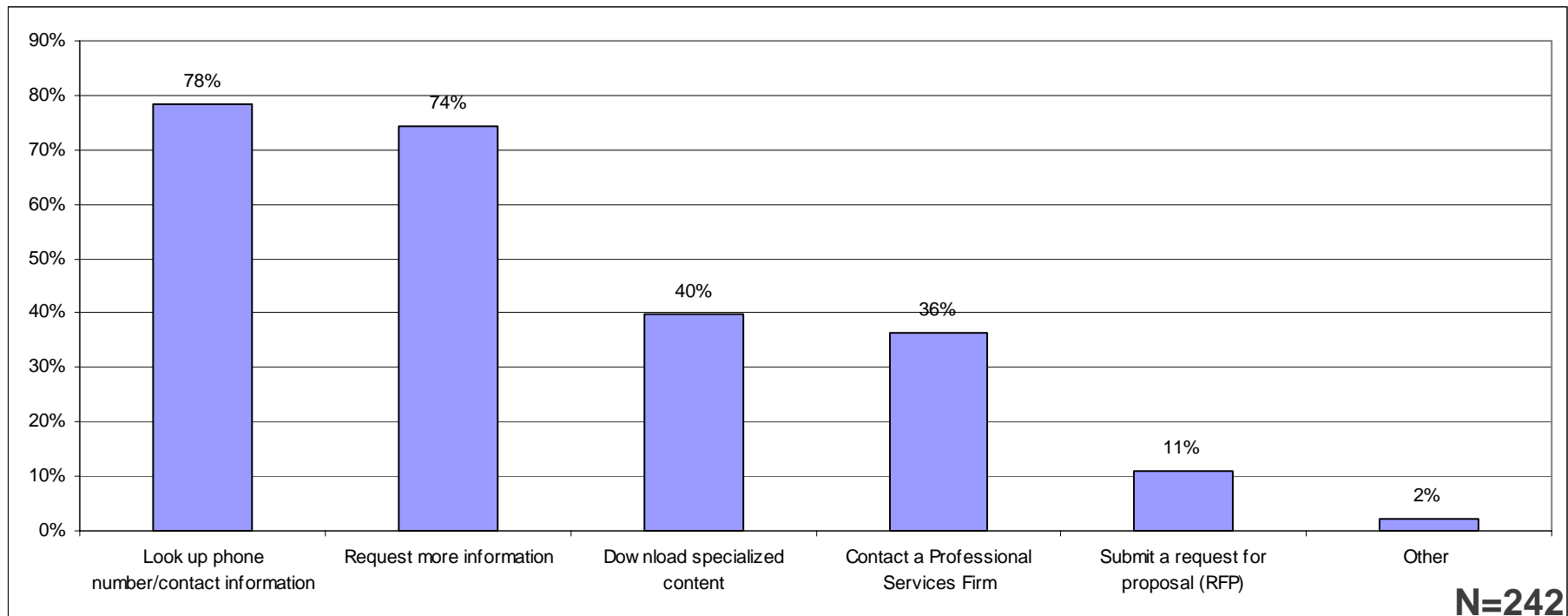
Have you ever done any of the following online? Please select all that apply.

## Over half of Google users go online to research Accounting/Taxation services and/or Legal Services



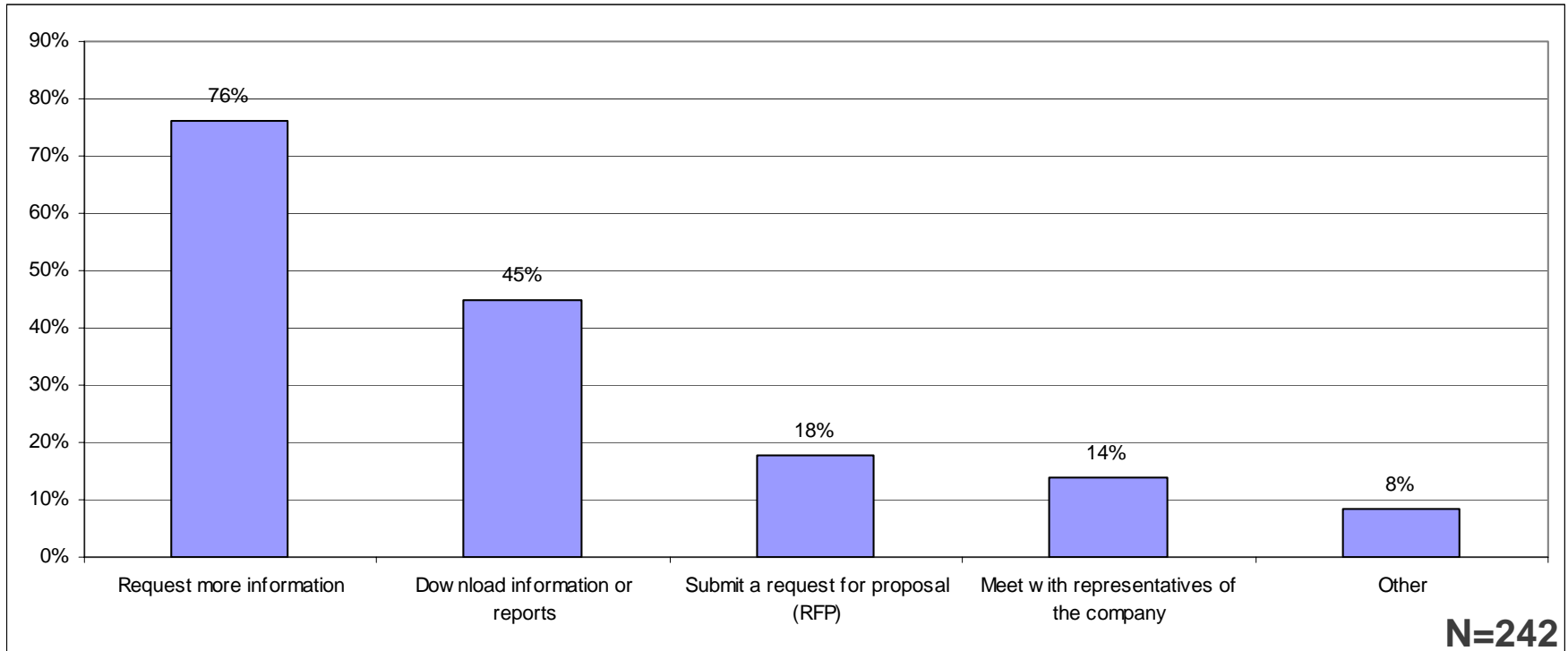
You indicated that you have researched Professional Services online. What kinds of items did you research or purchase? Please select all that apply

## Three-quarters (78%) of Google users find contact information for Professional Services online while 74% request more information



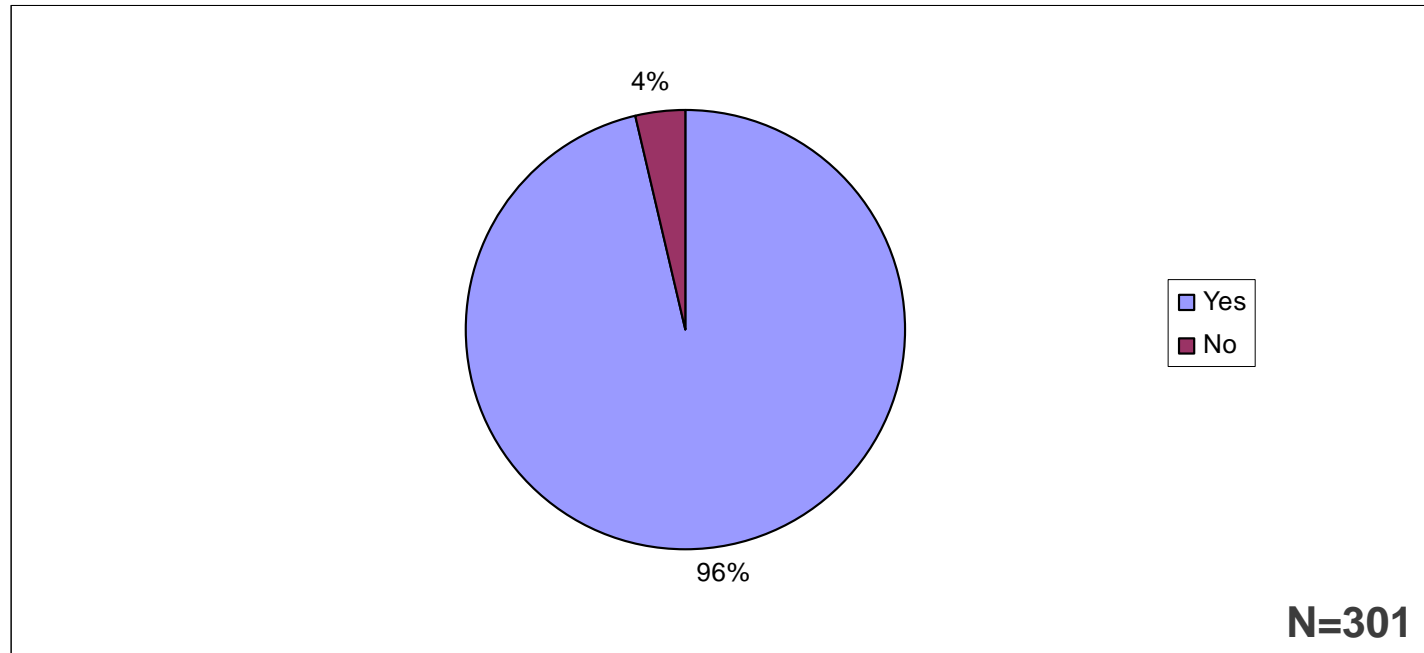
Thinking of the times you have gone online to research Professional Services, have you ever done any of the following? Please select all that apply

## Over three-quarters (76%) of Google users report having to register when requesting more information



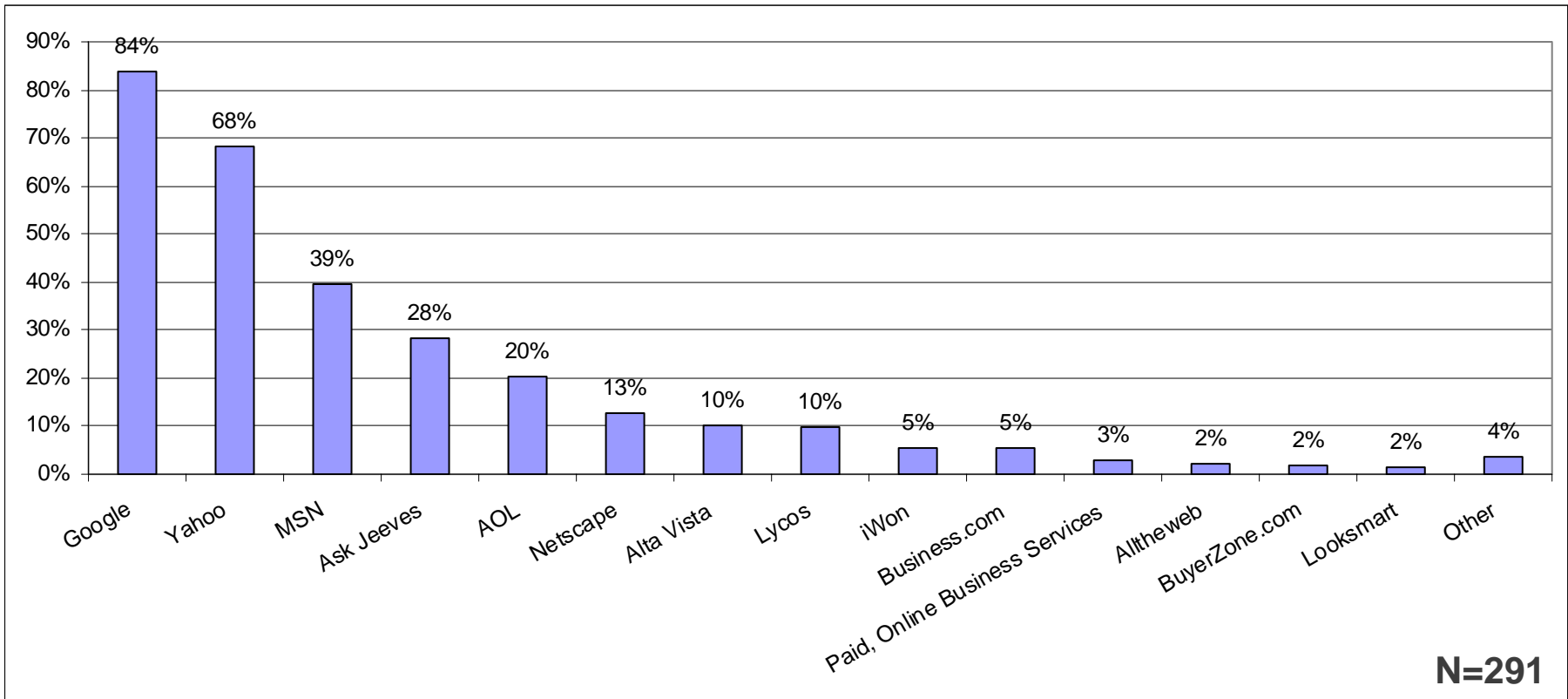
Have you ever had to REGISTER in order to complete any of the following online activities? Select all the activities you have engaged in that required you to REGISTER online. Please select all that apply

## Almost all respondents (96%) have used a search engine to research Professional Services



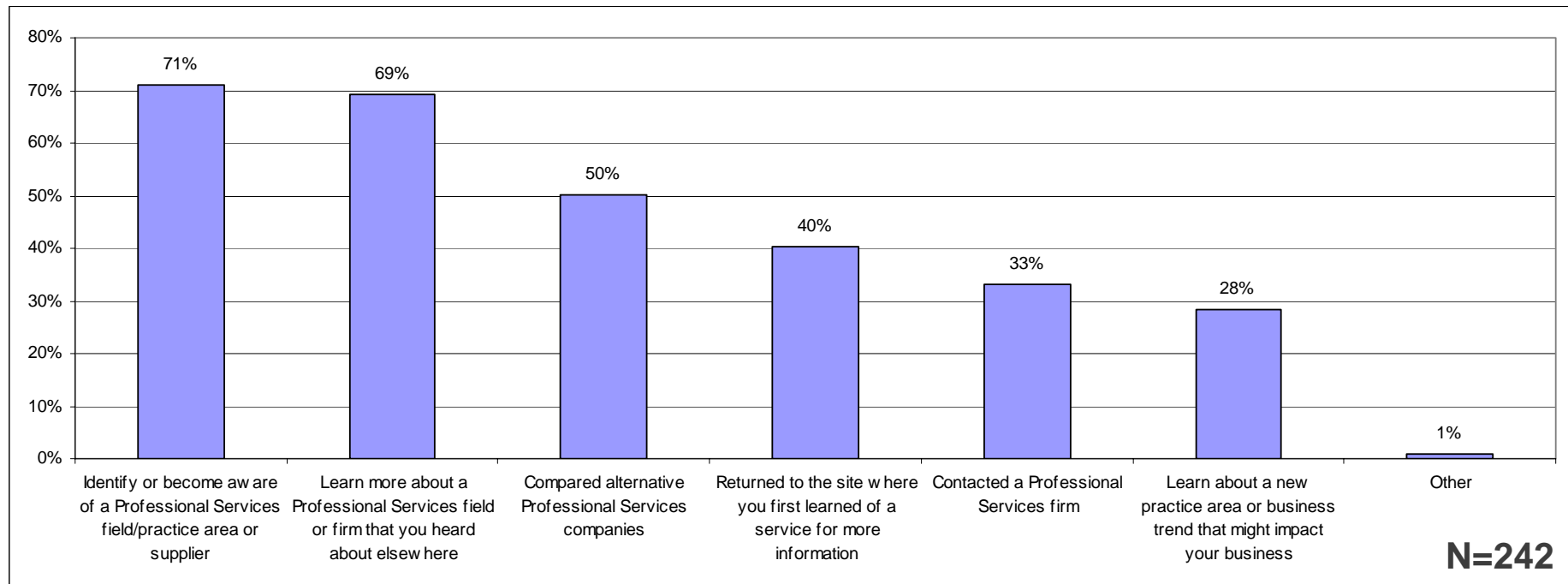
Do you ever use a search engine (such as Google, Yahoo, AOL, MSN or Ask Jeeves) when you research Professional Services offerings online?

## Google is the most popular search engine for researching Professional Services – used by 84% of all respondents



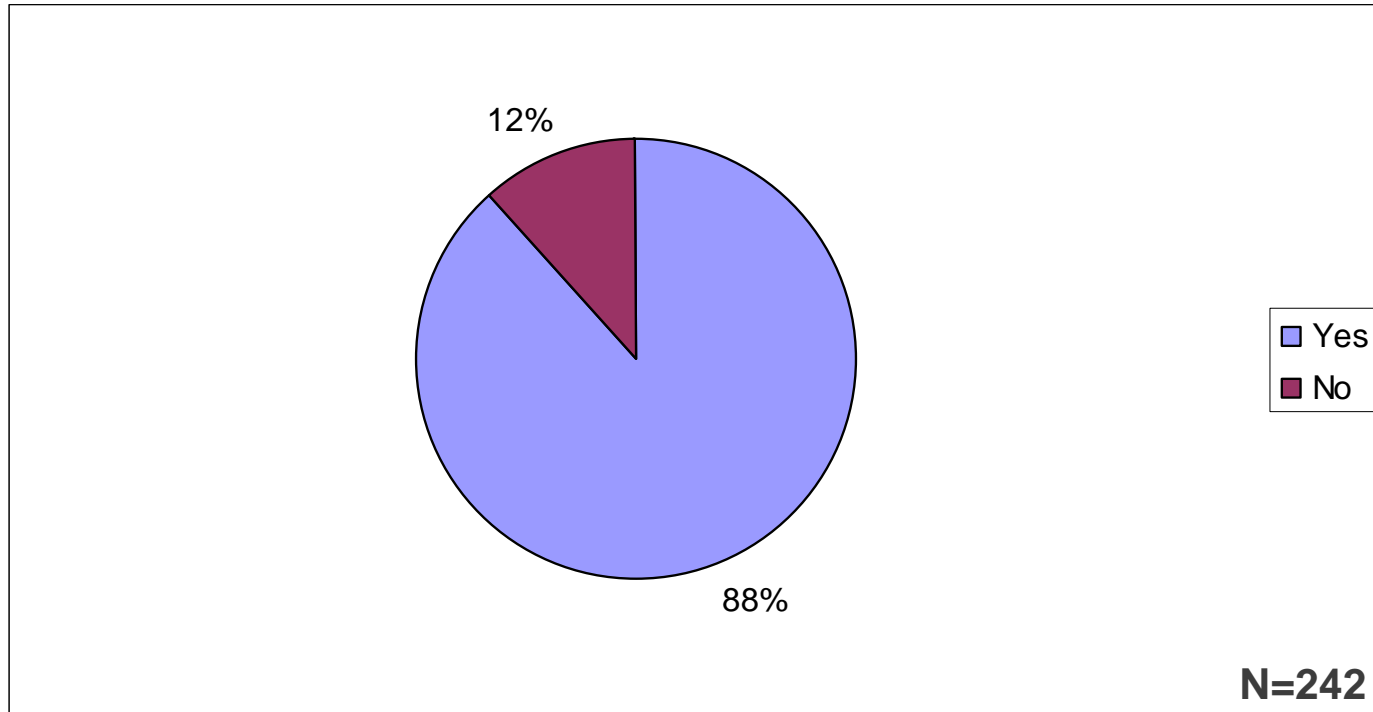
Which of the following search engines / directories do you use when you research Professional Services online? Please select all that apply.

## Over two-thirds of Google users used a search engine to become aware of and learn more about a Professional Services field or firm



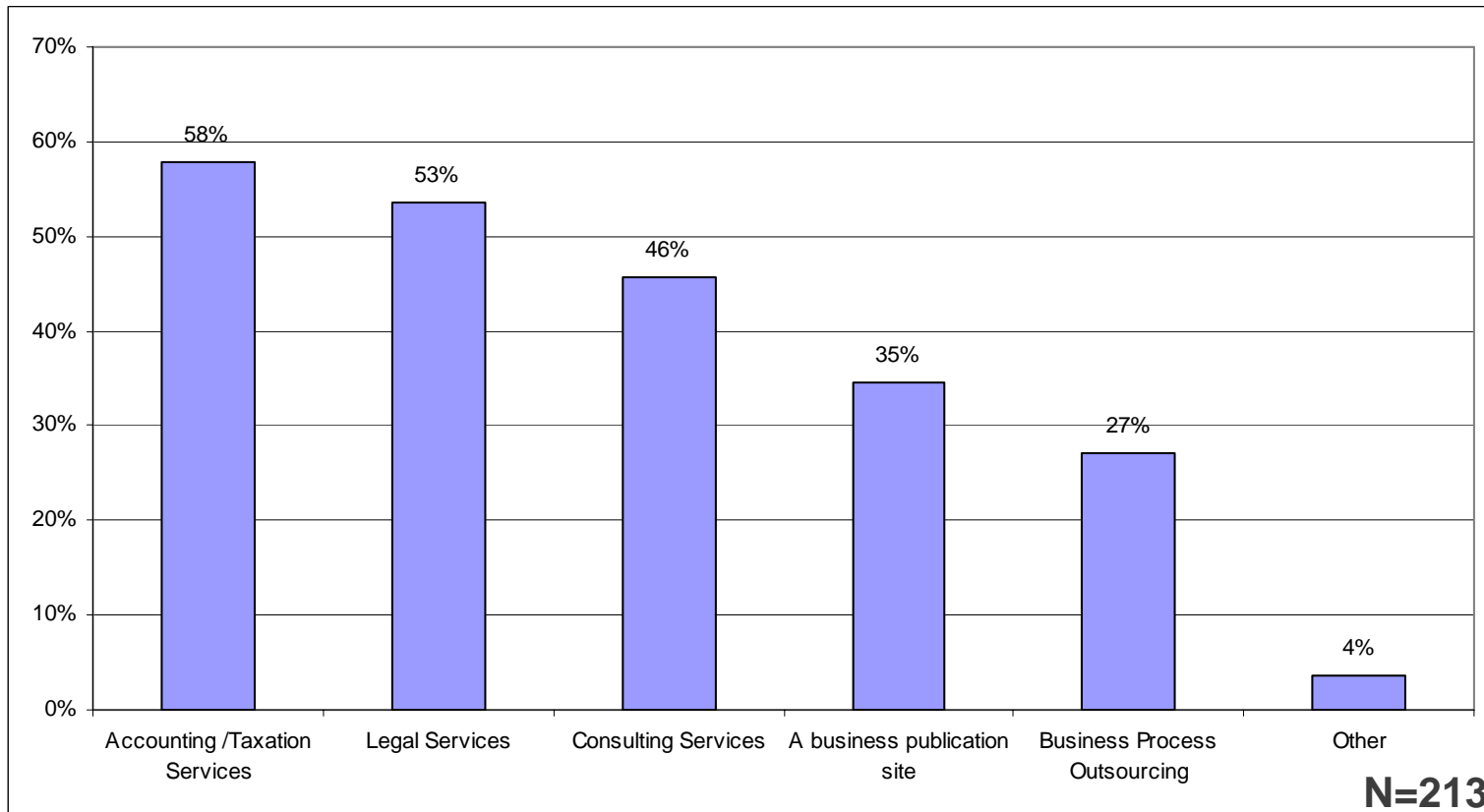
Which of the following activities have you used a search engine to help you to do? Select all that apply.

## The vast majority (88%) of Google users used a search engine to find specific Professional Services sites



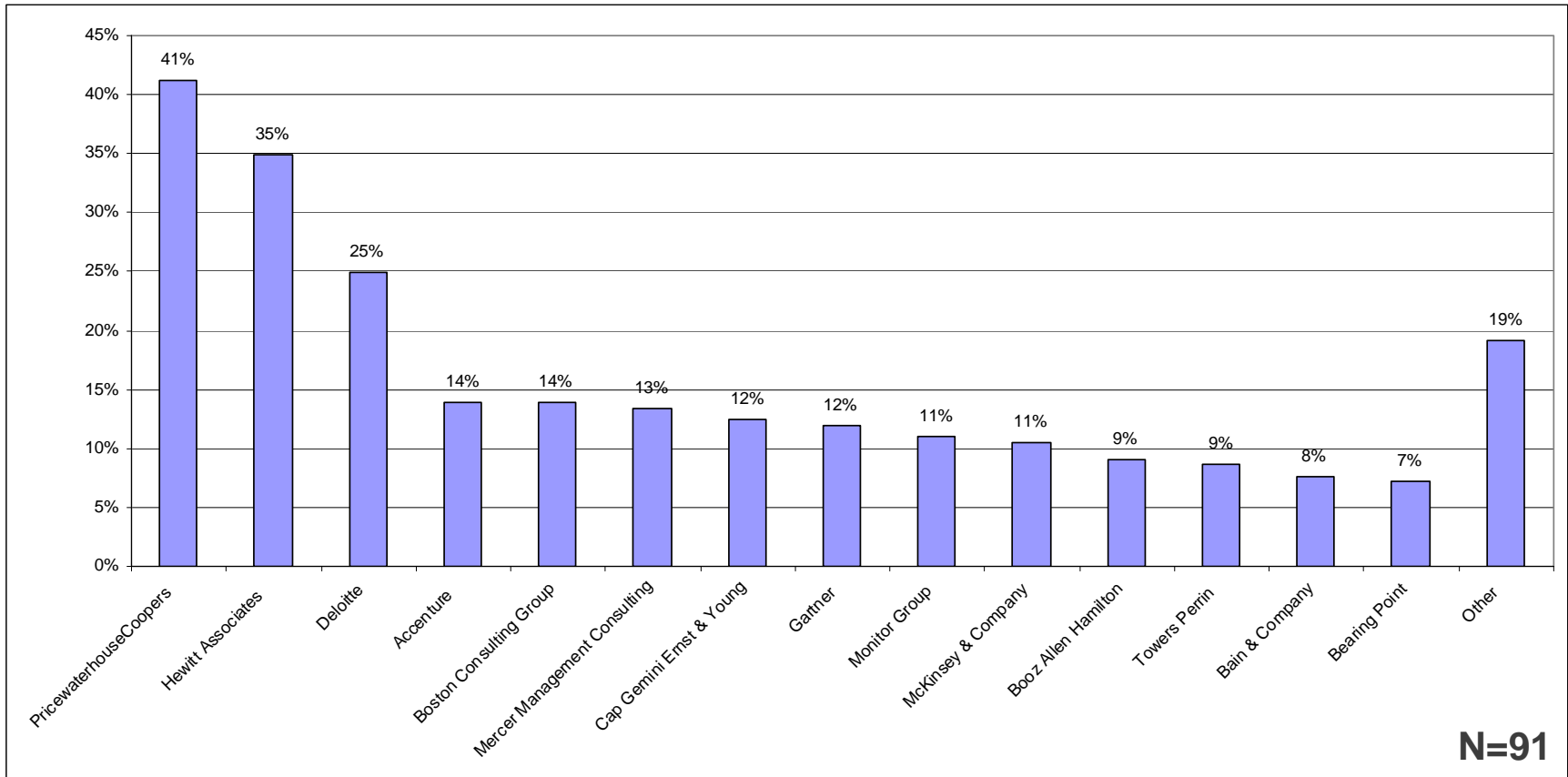
Do you ever use search engines to find specific websites related to Professional Service offerings? For example, say you're looking for a specific Accounting/Taxation site. Do you ever use a search engine to help you find that site?

## Over half of Google users used a search engine to find Accounting/Taxation (58%) and Legal Services (53%) sites



What kinds of Professional Services sites have you used a search engine to help you find? Select all that apply.

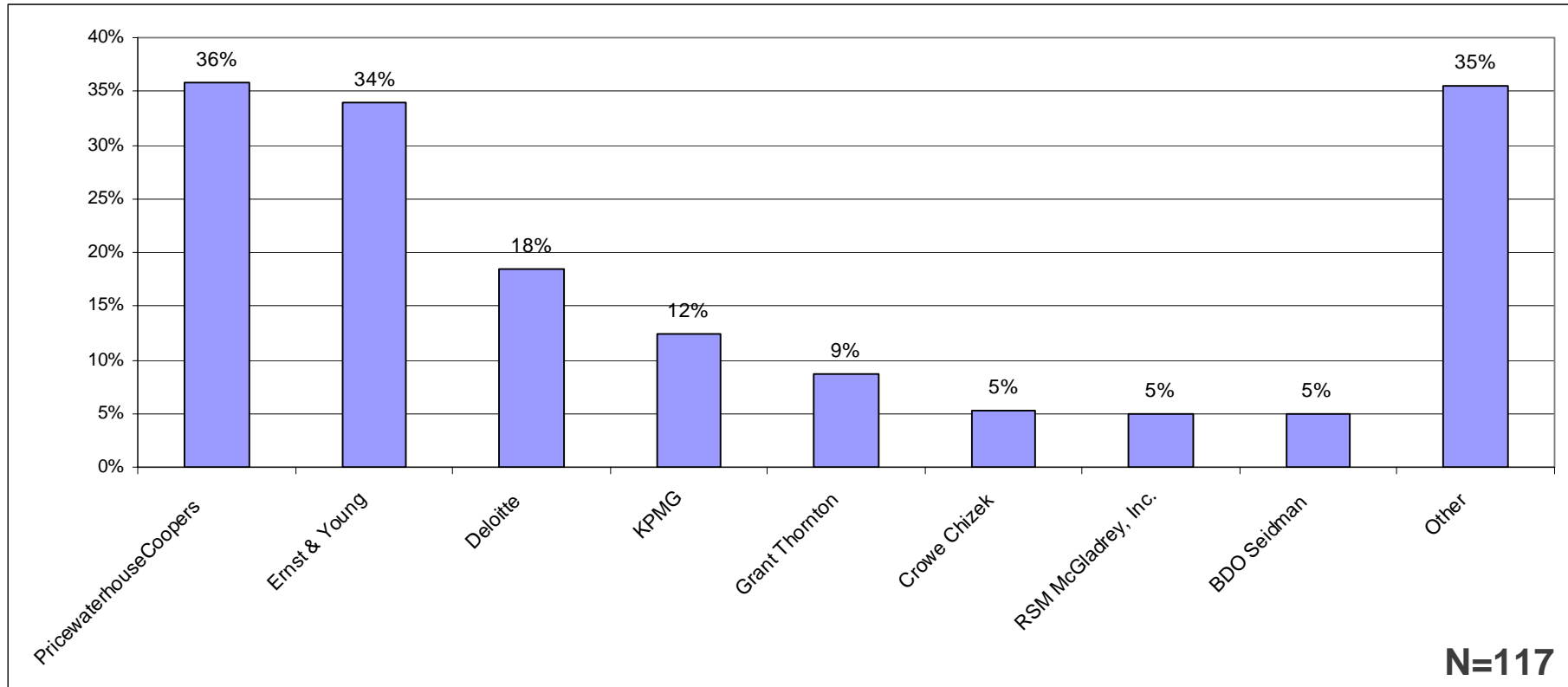
## 41% of Google users used a search engine to find Pricewaterhouse Coopers when locating Consulting Services



You indicated that you have used a search engine to locate sites for Consulting Services and/or information. Which of the following company sites have you used a search engine to help you find? Select all that apply.

Source: 2005 Professional Services Survey, conducted by GMI and Media-Screen (Mar. 2005)

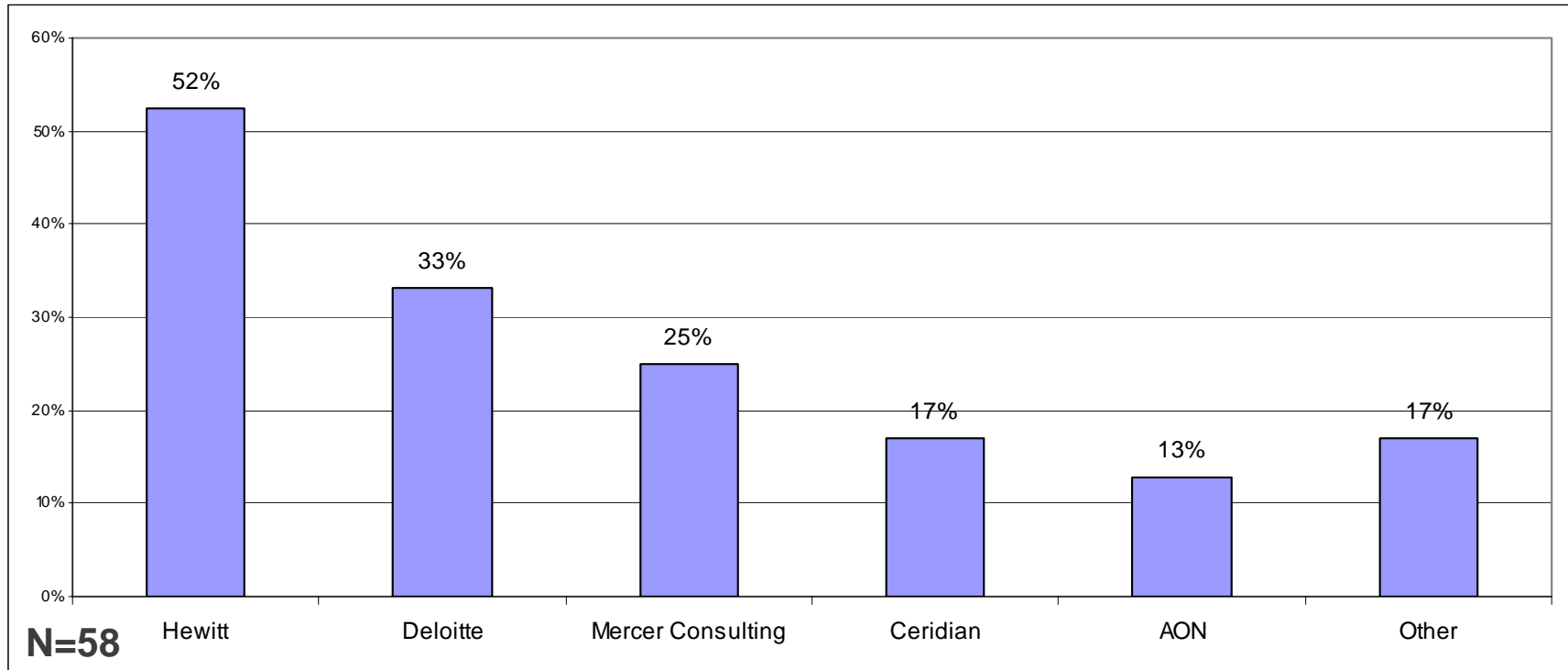
Over one-third of Google users used a search engine to find **Pricewaterhouse Coopers (36%)** when locating Accounting / Taxation Services (*H&R Block was also highly reported as Other among all respondents*)



You indicated that you have used a search engine to locate sites for Accounting and Taxation Services and/or information. Which of the following company sites have you used a search engine to help you find? Select all that apply.

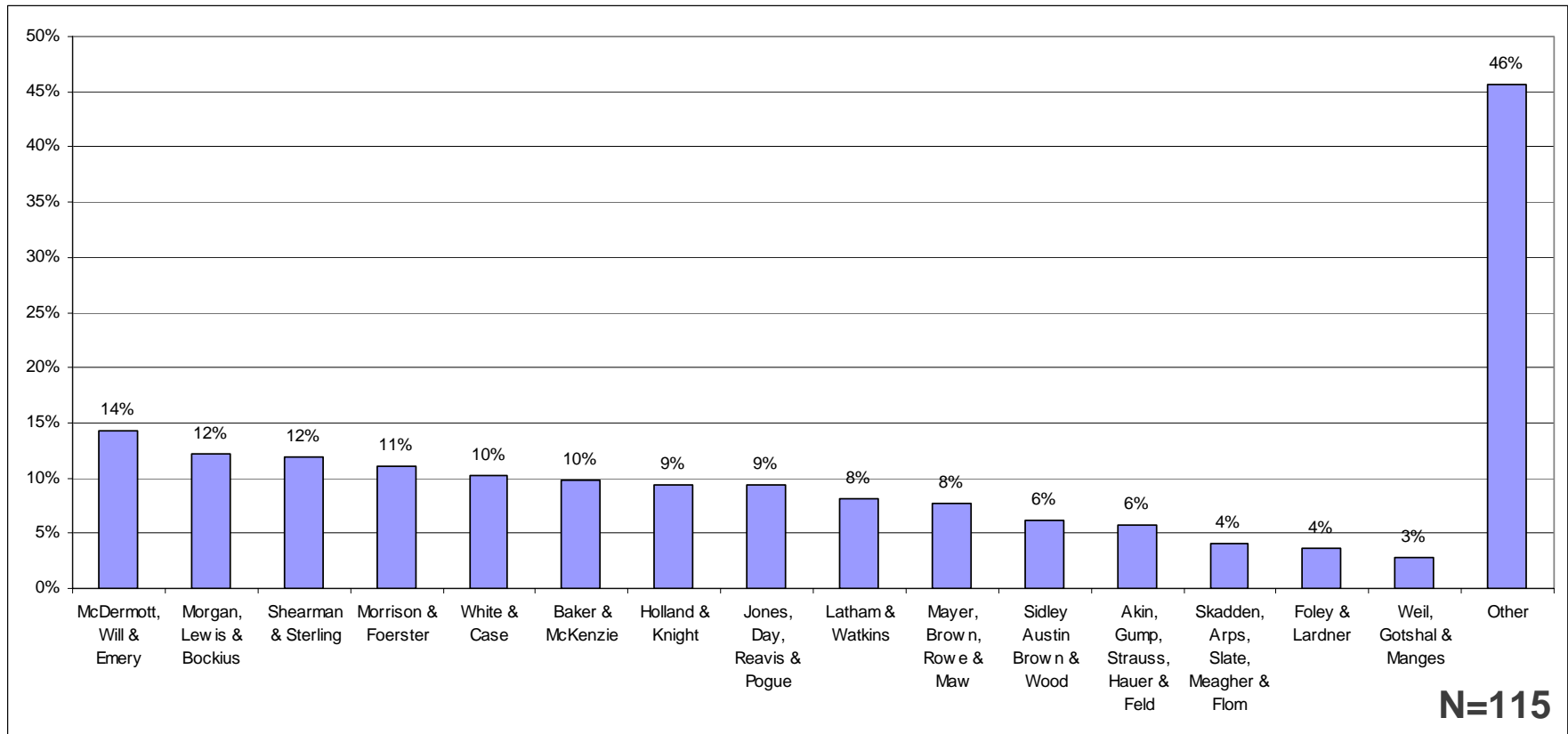
Source: 2005 Professional Services Survey, conducted by GMI and Media-Screen (Mar. 2005)

## Over half of Google users (52%) used a search engine to find Hewitt when locating Business Process Outsourcing Services



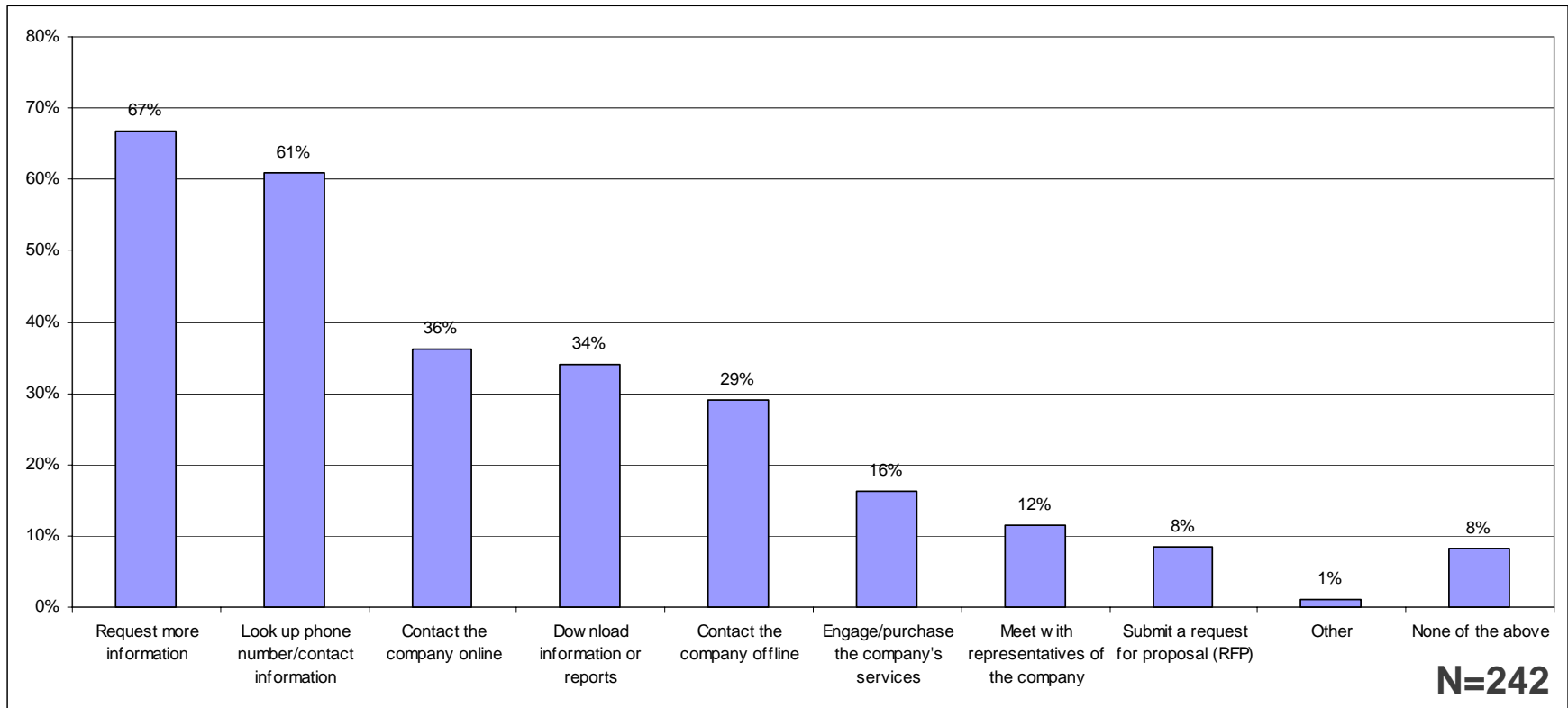
You indicated that you have used a search engine to locate sites for Business Process Outsourcing Services and/or information. Which of the following company sites have you used a search engine to help you find? Select all that apply.

## Almost half (46%) of Google users used a search engine to find “other” legal sites, i.e. not the large firms we listed



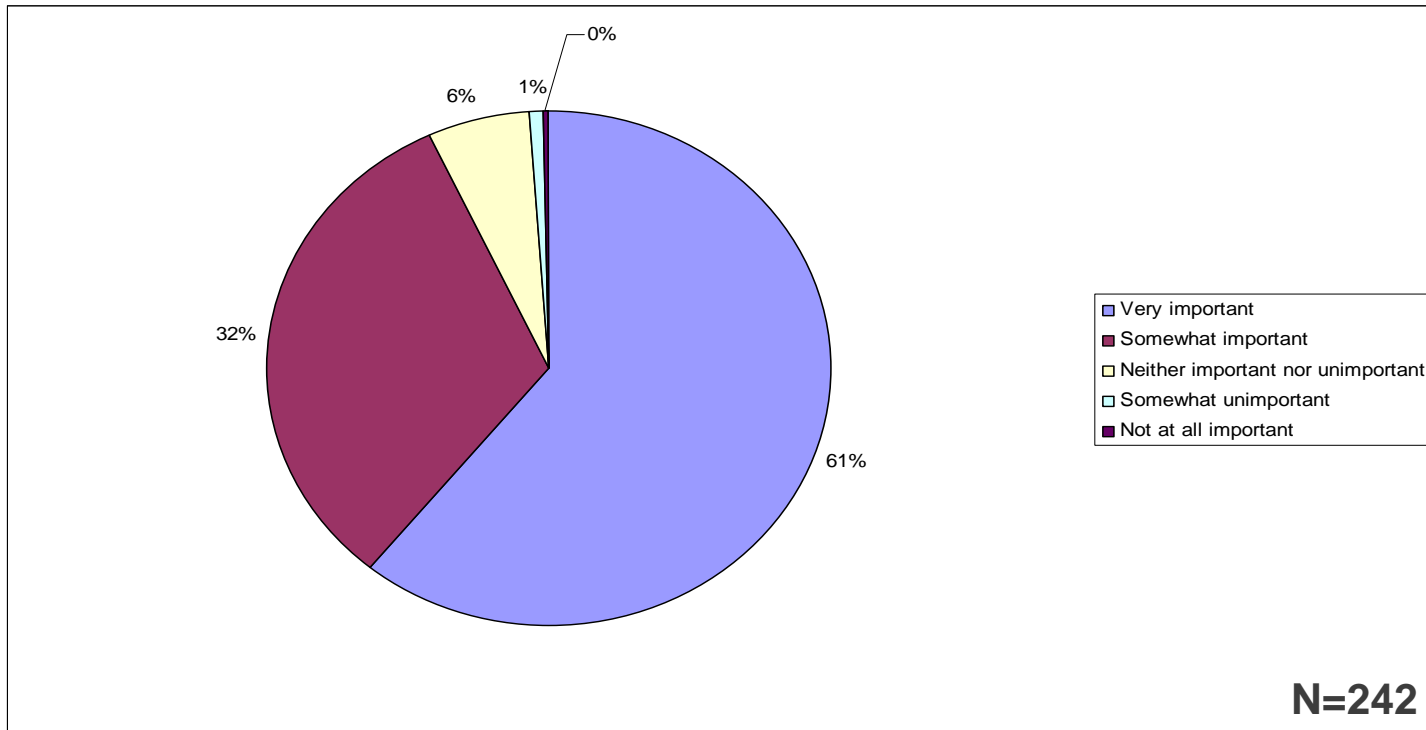
You indicated that you have used a search engine to locate sites for Legal Services and/or information. Which of the following company sites have you used a search engine to help you find? Select all that apply.

## Two-thirds (67%) of Google users requested more information after using a search engine



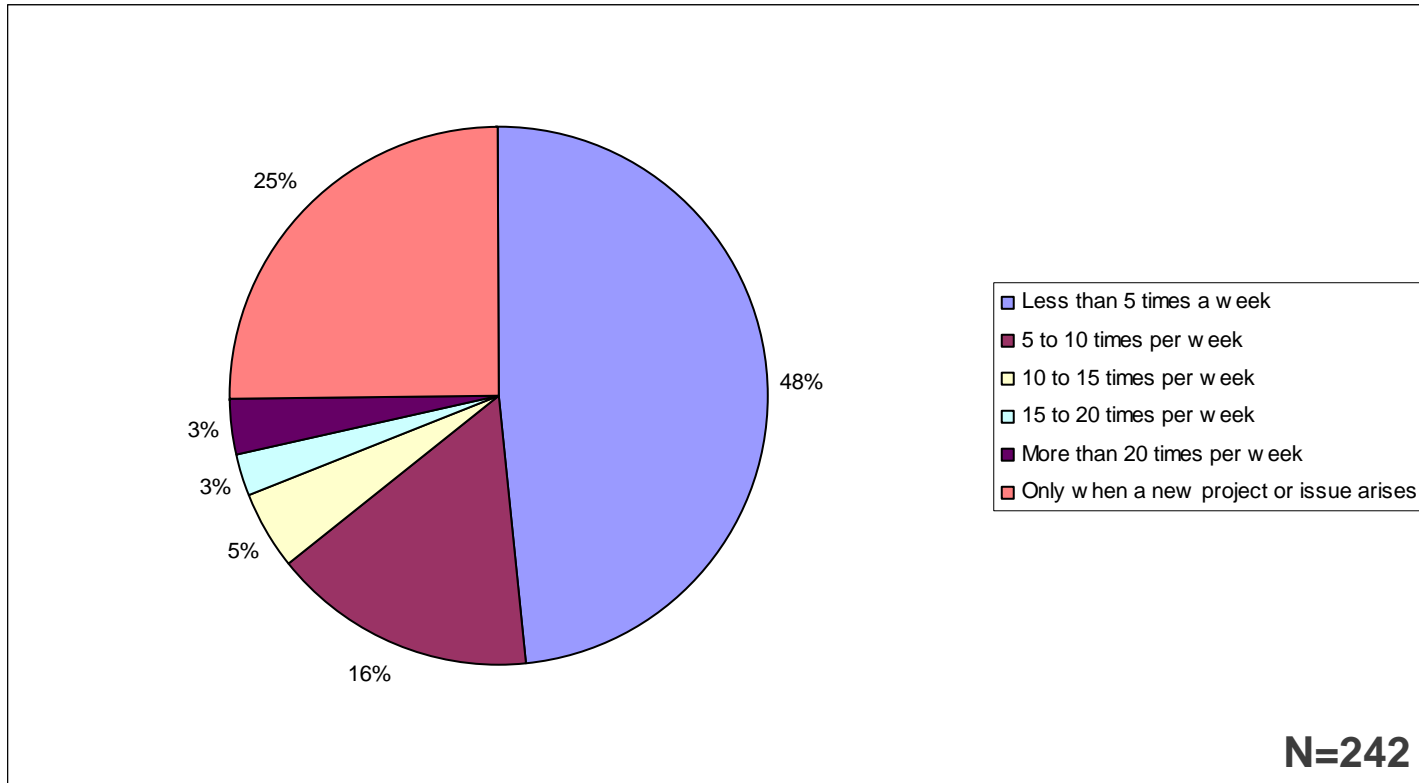
After using a search engine to help you find a website for Professional Services and/or information did you eventually: Select all that apply

**A vast majority (93%) of Google users report that a search engine is very/somewhat important in helping to get information and/or identify a Professional Services supplier**



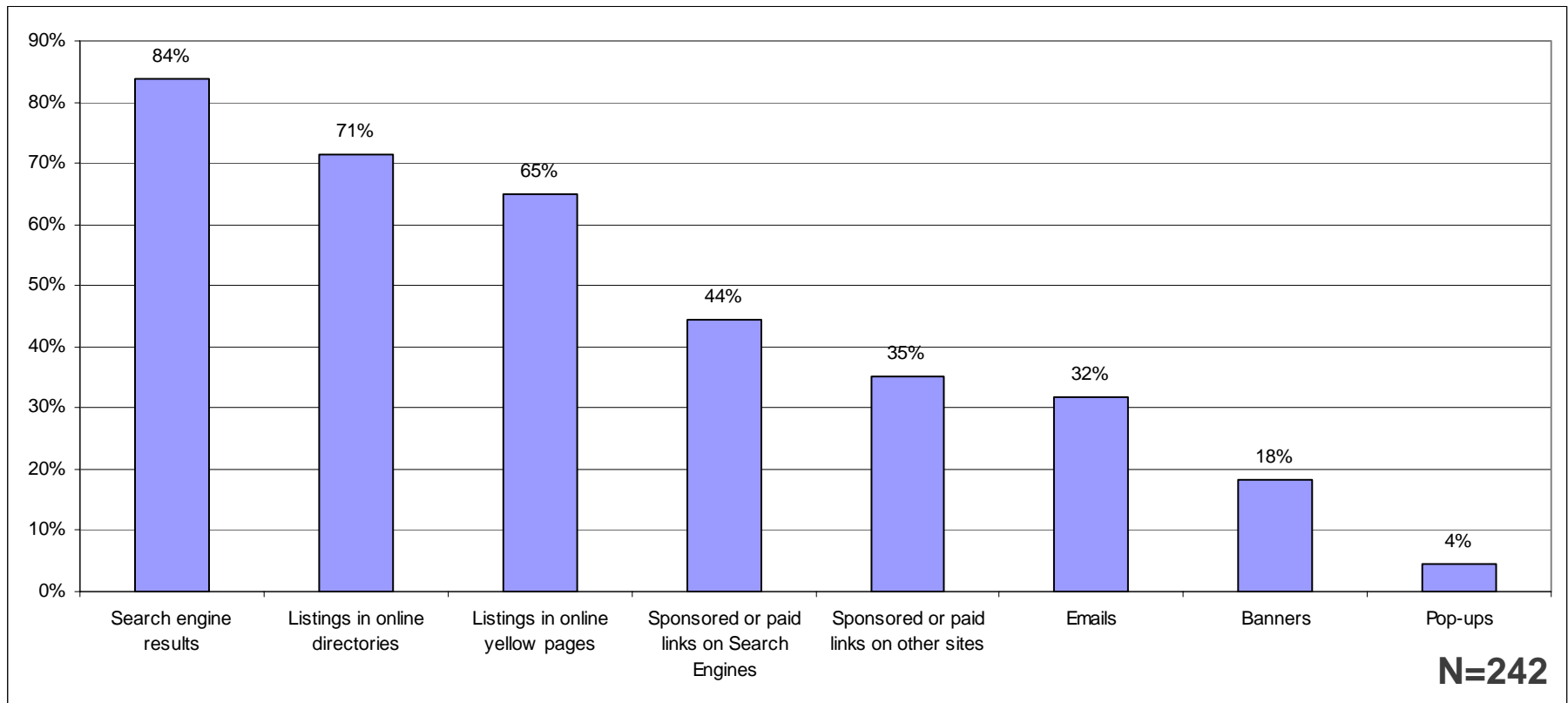
When you research Professional Services, how important is using a search engine to help you get information and/or identify a potential supplier?

**Nearly half (48%) of Google users use a search engine for Professional Services less than 5 times a week, while one-quarter (25%) wait until a new project arises**



On average, how frequently do you make queries on a search engine to learn about Professional Services and information?

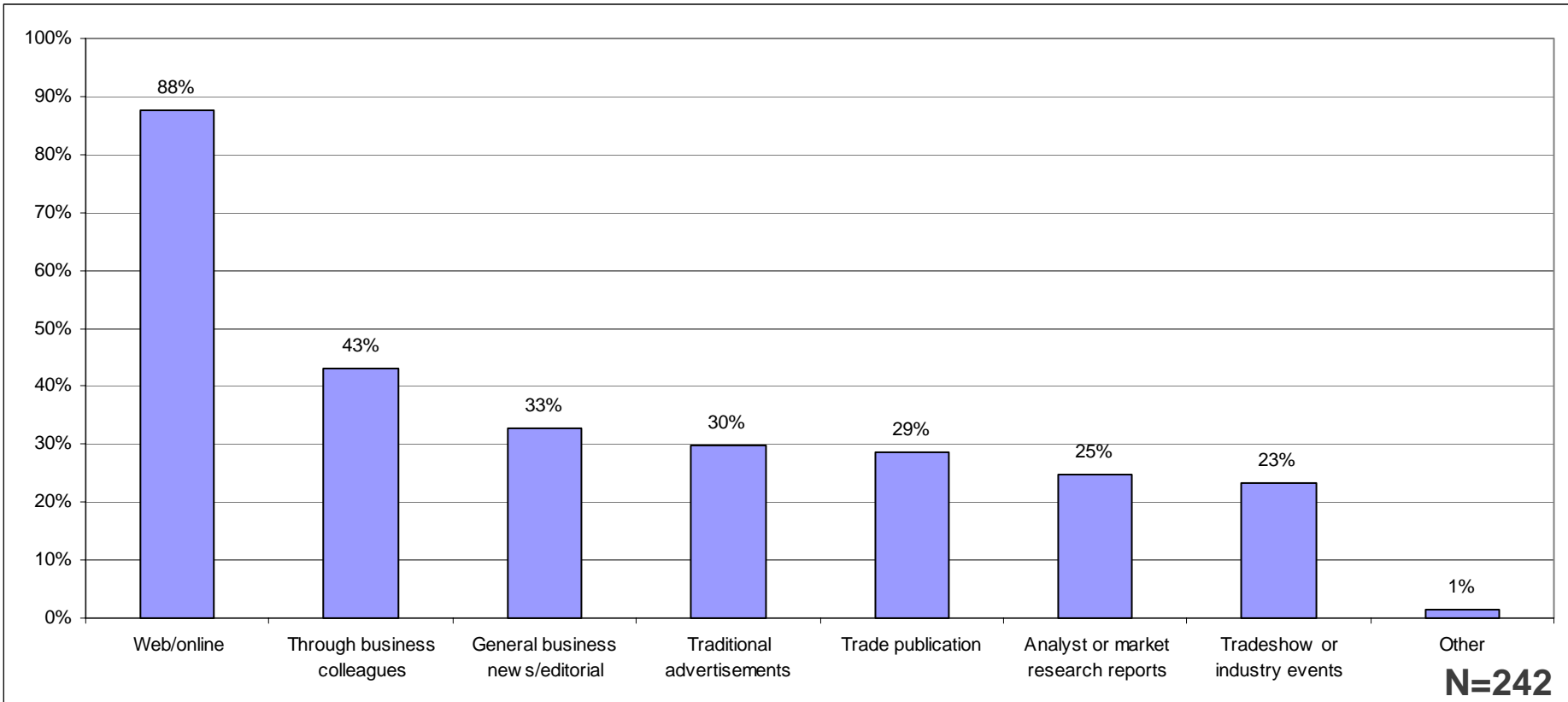
The vast majority (84%) of Google users find search engine results very/somewhat helpful in leading them to Professional Services and/or information. 44% find sponsored or paid links on search engines very/somewhat helpful



Which of the following forms of advertising do you find helpful in leading you to Professional Services and/or information.

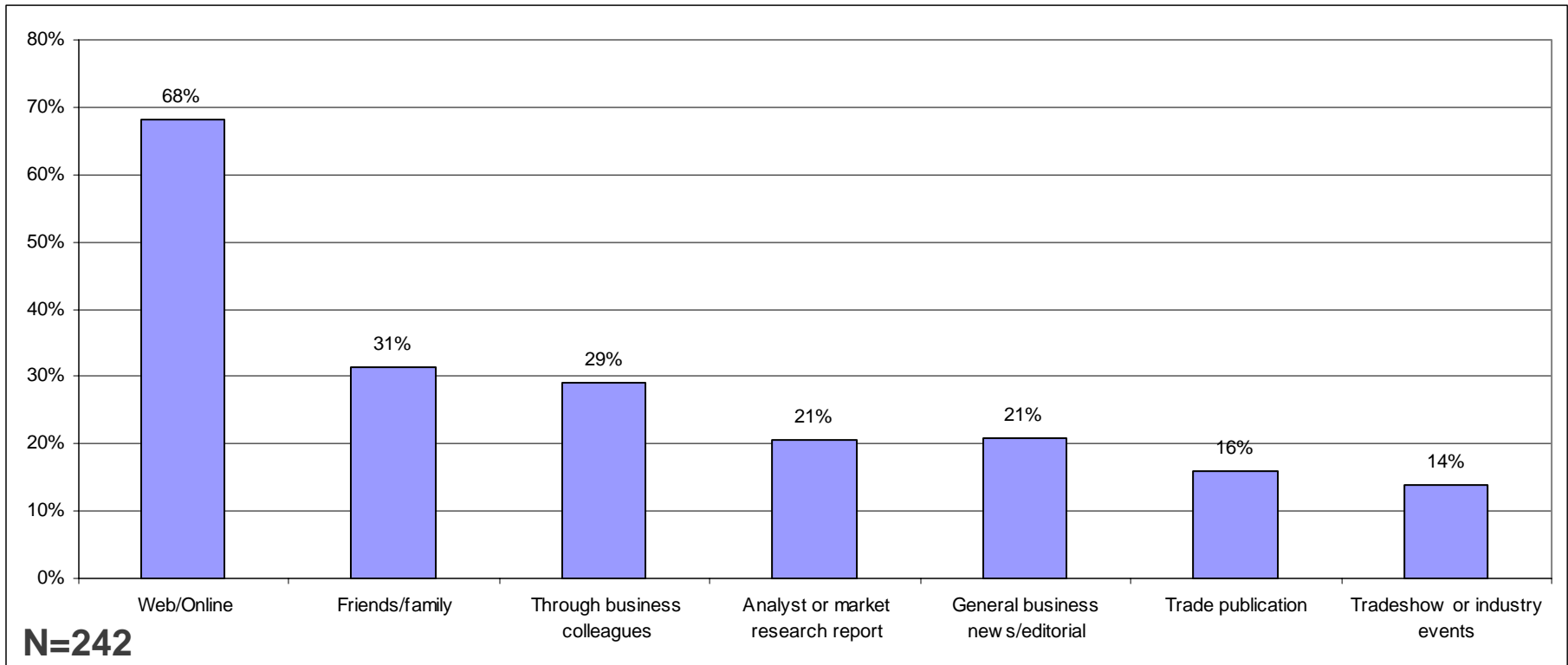
Source: 2005 Professional Services Survey, conducted by GMI and Media-Screen (Mar. 2005)

## The vast majority (88%) of Google users prefer to find their Professional Services information online



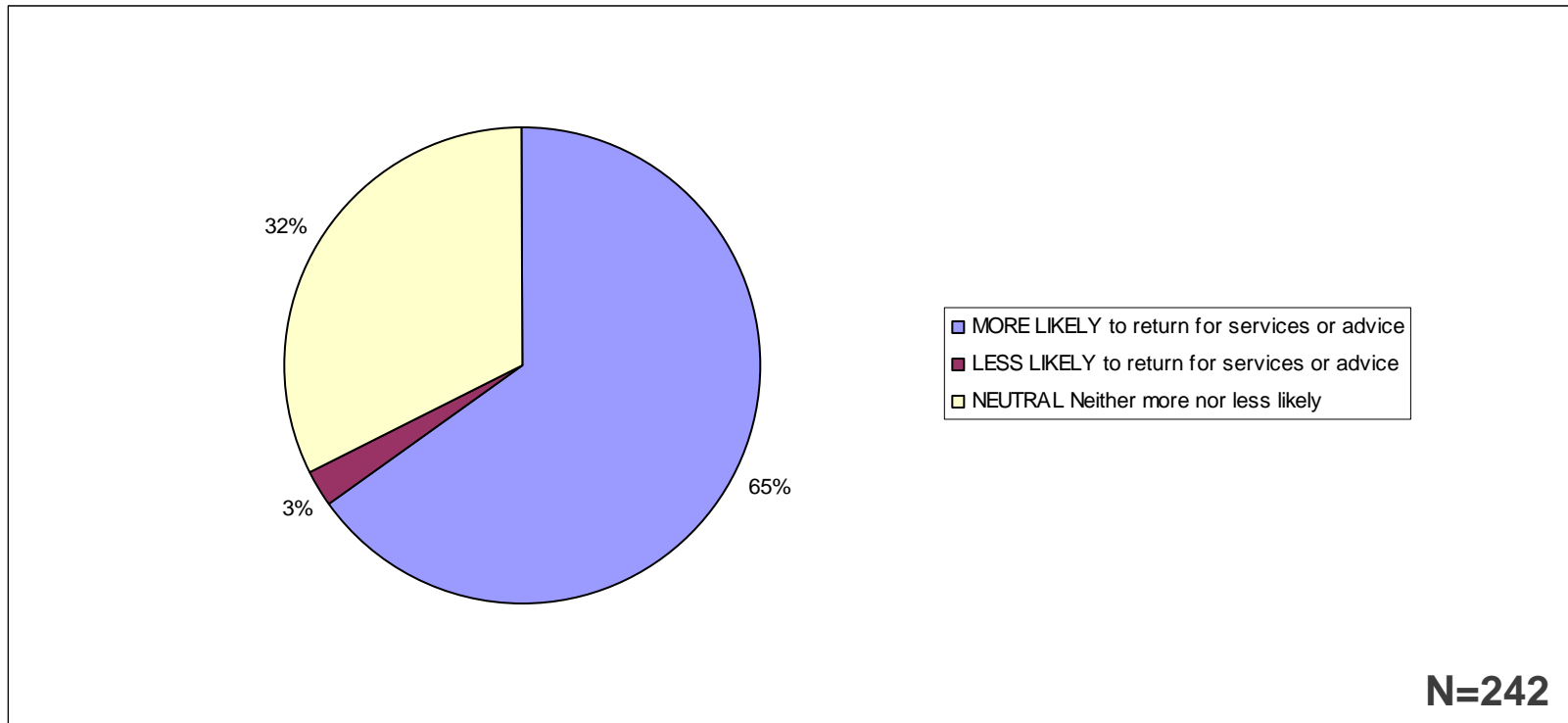
How do you prefer to learn about Professional Services offerings? Select all that apply.

## Two-thirds (68%) of Google users expect to be using the web/online more often for Professional Services information



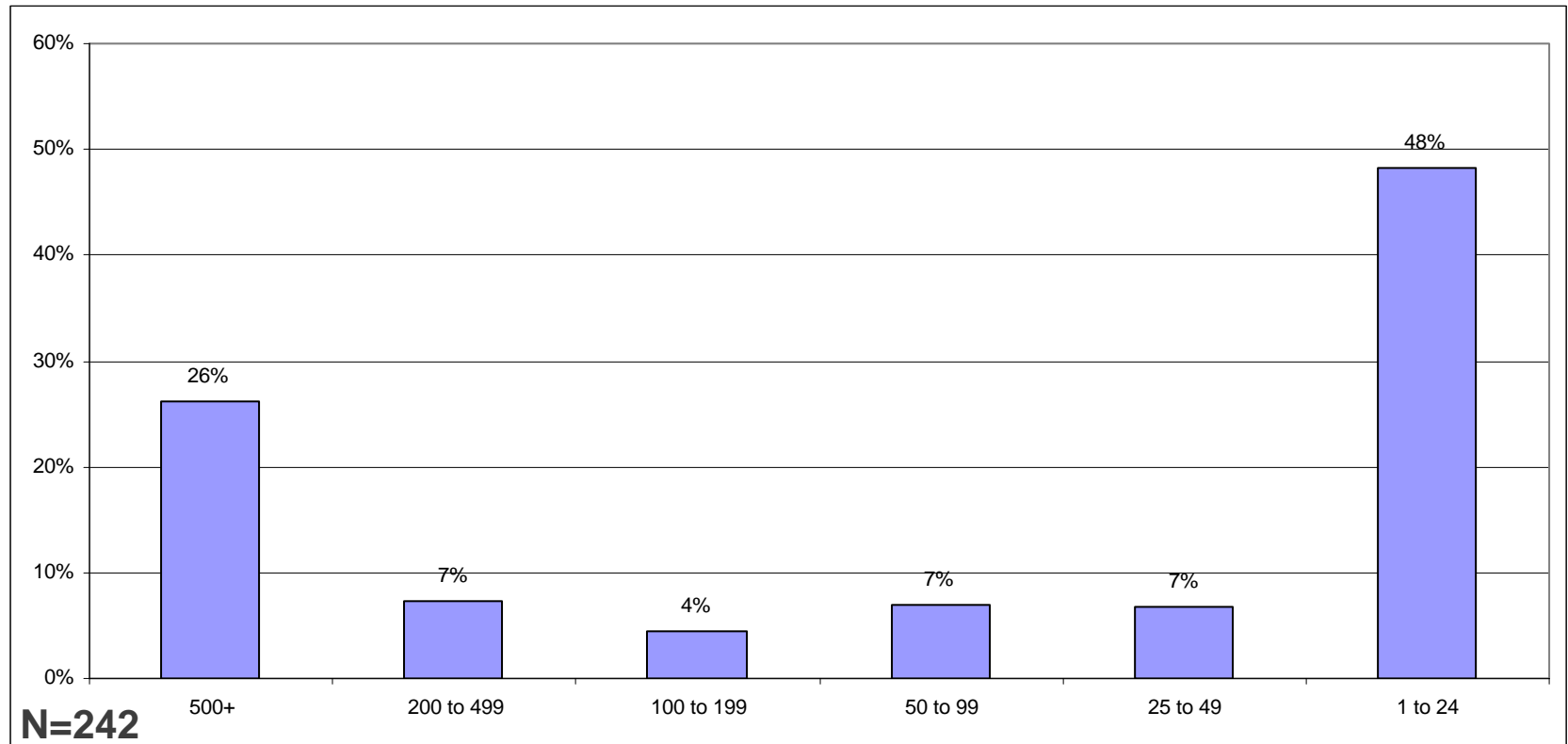
In the future, do you think you will be using each of the following channels “More Often”?

**After engaging with a Professional Services firm, nearly two-thirds (65%) of Google users say they are more likely to go back to that firm for service or advice on new issues or initiatives**



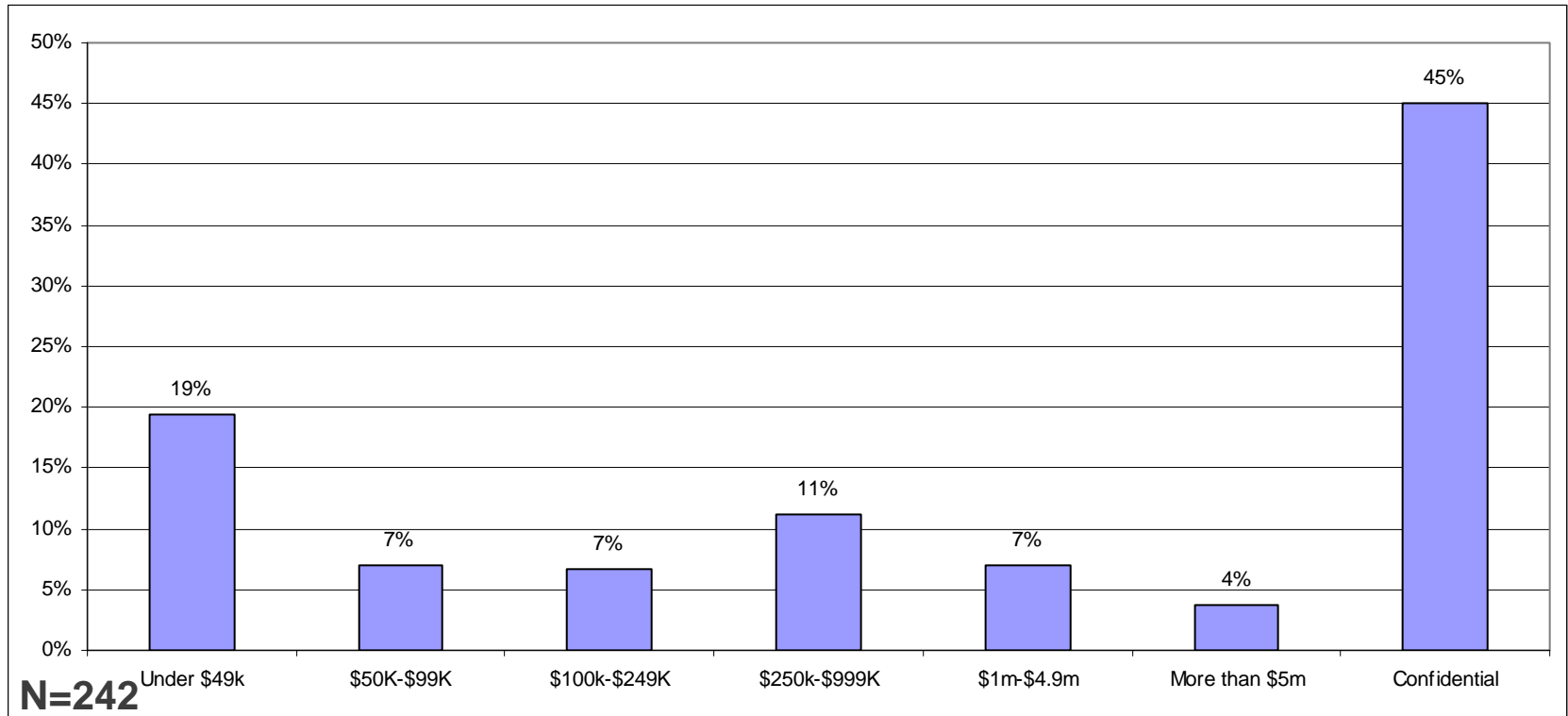
After you engage with a Professional Services firm, are you more or less likely to go back to that firm for services or advice on new issues or initiatives?

## Our sample of Google users is representative of small, medium and large-sized businesses



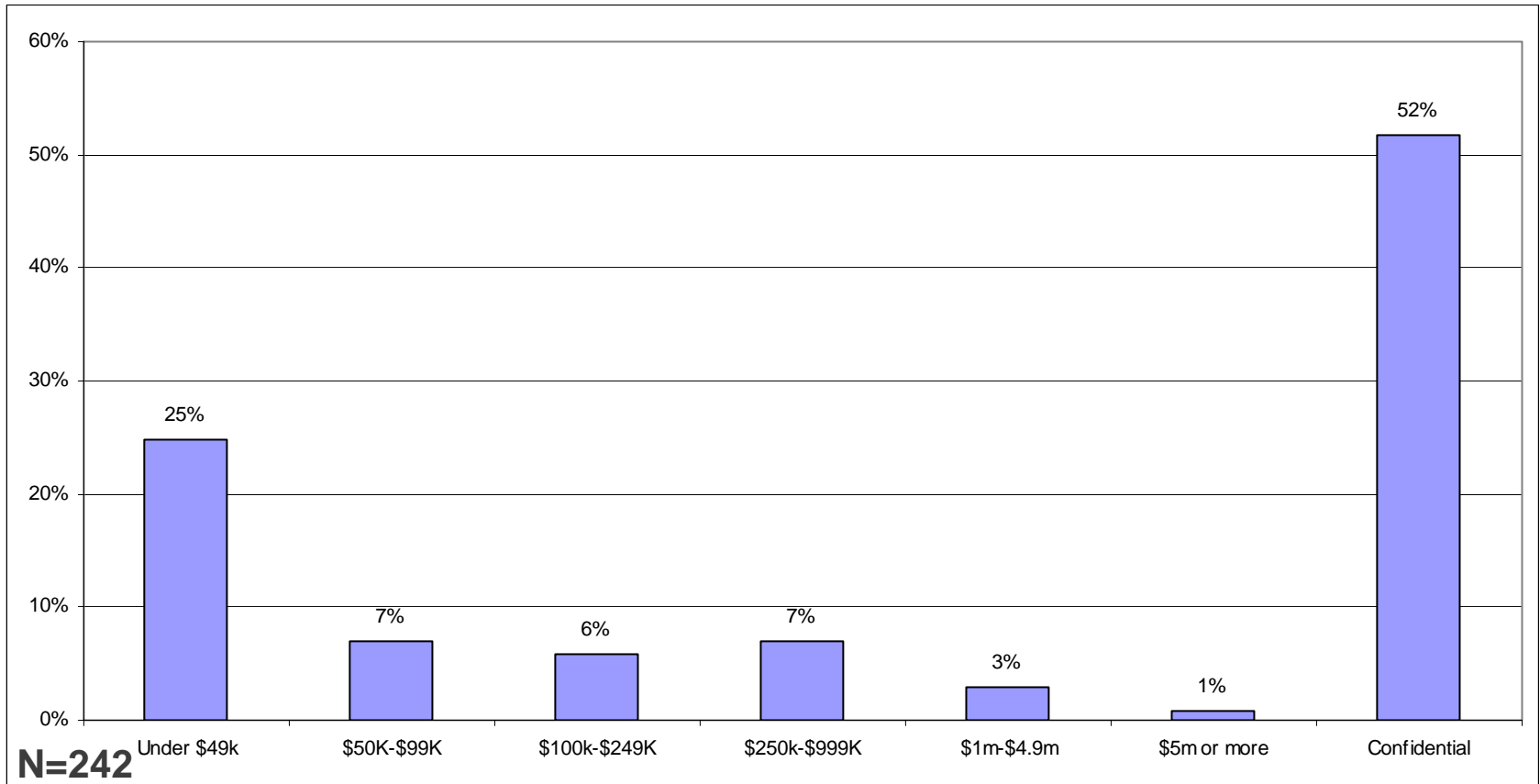
How many people are employed by your organization?

## Over one-quarter (29%) of Google users report their organization spends over \$100K annually on Professional Services



Approximately how much does your organization spend annually on Professional Services activities?

## One-quarter (25%) of Google users specify, recommend or approve over \$50K annually for Professional Services



How much of your organization's annual budget for Professional Services activities excluding staff costs do you personally specify, recommend or approve?