



Survey Report on Search Engine Market in China

2006

General Information

1. Name: *Survey Report on Search Engine Market in China 2006*
2. Data Collected by: August 2006
3. Survey Method: Telephone Interview
4. Sample Size: Totally 4500 effective samples in Beijing, Shanghai and Guangzhou, 1500 samples in each city.
5. Number of Pages: 90 Pages
6. Number of Figures and Tables: 111
7. Value Added Services:
 - I Provide extra accessories, release supplementary reports on the market environment
 - I In-depth data analysis, providing comparative analysis services based on the “Survey Report on Search Engine Market in China 2006” and the “18th Statistical Survey Report on the Internet Development in China”
 - I Other in-depth consultation services regarding the content and statistics of the report
8. Link: <http://www.cnnic.cn/index/OE/manual/102/index.htm>

About the Report

Based on CNNIC's data and experiences accumulated from its surveys, taken CNNIC's scientific survey methodologies and strict quality control, CNNIC published the Survey Report on Search Engine Market in China 2006.

Comparing with the report published in September 2005, the new report issued continued the survey with consistent methodology and survey range. It reserved most important questions for asking, and added a few hot issues which were newly emerged in 2006, through which the report can keep up with the development of the market, and totally comparable to last year's report as well. Furthermore, CNNIC enlarged the sample volume to improve the accuracy of the survey. With the significant reference value, the continuous two survey reports will surely benefit the researches on the changes, users'

flows and development directions of China's search engine market.

Besides, the publication of the Survey Report on Search Engine Market in China 2007 is scheduled in the same period next year. CNNIC will continuously provide comparable survey reports to the people of the search engine industry.

Price Table for English Version

Selling Type	Year	Price (in RMB)
Main Report	2006	45,000
Bundled	2005 and 2006	63,000
Bundle and Booking	2006 and 2007 (scheduled)	81,000
Bundle and Booking	2005, 2006 and 2007 (scheduled)	99,000

Note:

1. The reports are all electronic versions in PDF format
2. Pay 5000 Yuan RMB for Chinese versions

Consultation and Payment

1. Consultation

Contact person: Mr. Hong Tao

Telephone: 86-10-58813181

Fax: 86-10-58812666-124

Email: hongtao@cnnic.cn

Link: <http://www.cnnic.cn/index/OE/manual/102/index.htm>

2. Payment Method

Beneficiary: Computer Network Information Center, Chinese Academy of Sciences

Account Number: 0200049609200016431

Bank of : Industrial and Commercial Bank of China, Haidian Branch

Address: 4, South 4th Street, Zhongguancun, Beijing 100080, China

P.O.Box: Beijing 349 branch 6, China Internet Network Information Center (CNNIC)

Methodology

In consideration of good randomness and accuracy of telephone interviews, we choose telephone as the sole approach to collect samples, and carried out the survey from August 11 to 27, 2006.

The interview targets of the survey are the citizens of Beijing, Shanghai and Guangzhou. The telephone numbers were randomly generated, while limited by local exchange numbers. We drew numbers of home/dormitory phones and personal access phones to carry out interviews. Interviewees are people who had ever used search engines and had been accessing the Internet in recent 6 months. We collected 1500 samples in each city, the total sample volume is 4500. In the confidence degree of 95%, with the design effect of 1.8, the max absolute error allowable of the main market share is less than 2%.

Survey methods:

- I Generate telephone numbers: Using all local exchange numbers as the first four digits of the telephone number, then randomly generate the rest digits.
- I Carry out interviews: Dial the randomly listed numbers one by one, looking for qualified samples.
- I Besides strictly control telephone numbers, we also adopted the following methods to guarantee the randomness and accuracy in collecting the samples: 1) during working days, the interview starts after 18:00 to make office workers feel appropriate, while last the whole day during weekends; 2) for busy numbers, the interviewers dial at least three times to reduce its influence to the randomness; 3) the interviewers are prohibited to give any hints to the questions of which the options are unnecessary to be read, and they shall ask until getting a proper answer to avoid the interview being affected by personal viewpoint of the interviewers.

- I Data collected were pretreated after each telephone interview. We checked the values of and logical relations between the variables, and delete all disqualified samples.

CONTENTS

Copyright statement

Survey Methodology

Definitions

Chapter One Characteristics Of Search Engine Users

I. GENERAL SITUATION OF THE CHARACTERISTICS

1. Using rate of search engines
2. Length and frequency of the Internet accessing
3. Starting year of using search engines
4. Frequency of using search engines
5. Searching modes

II. INDIVIDUAL CHARACTERISTICS OF SEARCH ENGINE USERS

1. Genders and ages
2. Educational degrees
3. Occupations
4. Monthly income

Chapter Two Market Shares of Search Engines

I. USERS' PRIMARY SEARCH ENGINES

1. General situation
2. Situations in different cities

II. MARKET SHARES – ONLY USE SEARCH FUNCTIONS

III. USERS' PRIMARY, SECONDARY AND TERTIARY SEARCH ENGINES

1. General situation
2. Numbers of one's search engines
3. Users' secondary search engines
4. Distribution of secondary search engines
5. Tertiary search engines

IV. POPULARITY OF SEARCH ENGINES

1. Popularity of search engines' brandnames
2. Attractiveness of search engines' brandnames and products

V. PRIMARY SEARCH ENGINES OF HEAVEY SEARCHERS

VI. PRIMARY SEARCH ENGINES OF HIGH-END USERS

VII. PRIMARY SEARCH ENGINES OF USERS ONLY SEARCH THROUGH WEBPAGE

Chapter Three Analysis on Obtaining and Loosing Search

Engines' Users

I. USERS' LOYALTY TOWARD SEARCH ENGINES AND REASONS

1. Users' loyalty toward each search engine
2. 15 Main reasons for people to choose their search engines (attention towards each factor)
3. Comparison of the 12 factors that primary search engine users concern the most
 - (1) Experiences of searching
 - (2) Promotion of the website
 - (3) Other factors

II. DEFAULT RATES AND ACQUISITION RATES OF THE SEARCH ENGINES

III. DIRECTIONS OF THE DEFAULT USERS AND SOURCES OF NEW COMMERS

1. Baidu
2. Google

IV. NEW USERS' PRIMARY SEARCH ENGINES

V. INTERATTRACTION BETWEEN SEARCHING-ORIENTED USERS AND OTHER

FUNCTION-ORIENTED USERS

1. Other function-oriented users being attracted by the searching functions
2. Searching oriented users being attracted by other functions

VI. MAIN REASONS FOR SELECTING CERTAIN SEARCH ENGINE AS THE SECONDARY CHOICE

1. The distribution of secondary search engines
2. Primary search engines of the users who select certain search engines as their seconds
3. Main reasons for being selected as secondary search engines

Chapter Four Using Habits of Search Engines

I. MAIN CONTENTS BEING SEARCHED THROUGH USERS' PRIMARY SEARCH ENGINES

1. Main contents searched via users' primary search engines
2. Main contents searched via users' primary search engines in different cities
3. Main contents searched via users' primary search engines

II. HOW DO USERS DEAL WITH UNIDEAL SEARCHING RESULTS

1. Users' behaviour General situation and in different cities
2. Behaviour of users of different search engines
3. Proportion of trying other search engines
4. Comparison between heavy searchers and light searchers

III. NUMBERS OF RESULT PAGES THAT USUALLY CHECK

1. General situation and situation in different cities
2. By users of different search engines

IV. EVALUATION OF SEARCH ENGINES' IMPORTANCE

1. General situation and for different cities
2. For users of different search engines
3. For users of heavy searchers and light searchers

V. SATISFACTORY DEGREES OF SEARCH ENGINES

1. General situation and for different cities
2. For users of different search engines
3. For users of heavy searchers and light searchers

VI. USERS' SUGGESTIONS ON IMPROVING SEARCH ENGINES

1. General situation and from different cities
2. From users of different search engines

Chapter Five Characteristics Comparison of Primary Search Engines' Users

I. GENERAL SITUATION OF INDIVIDUAL CHARACTERISTICS OF EACH SEARCH ENGINE'S USERS

1. Genders
2. Ages
3. Educational degrees
4. Occupations
5. Personal monthly income
6. Internet access

II. MARKET SHARES OF PRIMARY SEARCH ENGINES BY DIFFERENT USERS' CHARACTERISTICS

1. By age groups
2. By educational degrees
3. By occupations
4. By monthly income levels (non-student users)
5. Comparison between searching relies and non-reliers

Chapter Six Analysis on the Cognition of Search Engines' Rank Bidding

I. USERS' COGNITION OF RULES FOR RANKING SEARCHING RESULTS

1. For users of different search engines

II. USERS' COGNITION OF RANK BIDDING OF SEARCH ENGINE

1. General situation
2. For users in different cities
3. For users of different search engines
4. Cognition comparison: all users and high-end users

III. Statistics of clicking the right handside product columns (Sponsored Links)

1. General situation and users in different cities
2. For users of different search engines

Chapter Seven Others

I. ISSUE OF SEARCH FOR PERSONAL INFORMATION AND RECORD SEARCH ACTIVITIES

1. General situation
2. Situation in different cities
3. Viewpoints comparison: all users vs. high-end users

II. COGNITION OF CHINESE NAME FOR GOOGLE - 谷歌(GUGE)

1. General situation and users in different cities
2. Cognition comparison: all users vs. google primary users
3. Cognition of the name among high-end users

List of Figures and Tables

Figure1.1 Internet using frequency (all users)

Figure1.2 Starting year of using search engines (all users)

Figure1.3 Searching frequency (all users)

Figure1.4 Searching method (all users)

Table1.1 Distribution of age groups (all users)

Figure1.5 Age group comparison between student users and non-student users

Table1.2 Distribution of educational degrees (all users)

Figure1.6 Educational Degree comparison between student users and non-student users

Figure1.7 Occupations (all users)

Table1.3 Distribution of monthly income levels (all users)

Figure1.8 Monthly income comparison between student users and non-student users

users

- Figure2.1 Primary search engines (all users)
- Table2.1 Primary search engines (users in different cities)
- Figure2.2 Primary search engines (users who only access searching function)
- Figure2.3 Primary, secondary and tertiary search engines (all users)
- Figure2.4 Numbers of search engines being used (all users)
- Figure2.5 Number of Users' search engines
- Figure2.6 Secondary search engines (all users)
- Table2.2 Secondary search engines for different cities
- Table2.3 Distribution of secondary search engine when fixing people's primary ones (all users)
- Figure2.7 Tertiary search engines (all users)
- Figure2.8 Cognition of search engines' brands (all users)
- Table2.4 Cognition of search engines' brands in different cities
- Figure2.9 Attractiveness of search engines' brands and products (all users)
- Figure2.10 Primary search engines (heavy users)
- Figure2.11 Primary search engines (high-end users)
- Figure2.12 Primary search engines (when only use searching through webpage)
- Figure3.1 Loyalty comparison (users of different search engines, compare with that of the same period last year)
- Figure3.2 12 Main reasons for choosing primary search engine (all users, describing degrees that each aspect being concerned)
- Figure3.3 Reasons for Choosing Search Engines: searching experiences 1
- Figure3.4 Reasons for Choosing Search Engines: searching experiences 2
- Figure3.5 Reasons for Choosing Search Engines: website promotion
- Figure3.6 Reasons for Choosing Search Engines: other factors
- Figure3.7 Default rate and acquisition rate of all search engines
- Figure3.8 Source of Baidu's newly attracted users
- Figure3.9 Destinations of users that Baidu ever lost
- Figure3.10 Source of Google's newly attracted users

Figure3.11 Destinations of users that Google ever lost

Figure3.12 Primary search engines (all new search engine users)

Table3.1 Search engines selected by new commers in the same period last year
(August of 2005)

Figure3.13 Ratio of regarding other functions as the main reason for using a search engine

Table3.2 Besides searching, other functions of search engines being used

Figure3.14 Ratio of using search engine only for searching

Figure3.15 Secondary search engines (all users)

Table3.3 Primary search engines (when fixing their secondary search engines)

Table3.4 Main reason for regarding certain search engines as secondary ones but not primary ones

Figure4.1 Main content being searched (all users)

Table4.1 Main content being searched (users in different cities)

Table4.2 Main content being searched (users of different search engines)

Table4.3 Behaviour of users when they can not obtain ideal searching results (all users and users in different cities)

Table4.4 Behaviour of users when they can not obtain ideal searching results (users of different search engines)

Figure4.2 Ratio of changing to other search engines when fail to obtain ideal searching results (all users)

Figure4.3 Behaviour of users when they can not obtain ideal searching results (searching reliers and non-reliers)

Table4.5 Number of searching result pages usually being checked (all users and users in different cities)(1)

Table4.6 Number of searching result pages usually being checked (all users and users in different cities)(2)

Table4.7 Number of searching result pages usually being checked (users of different search engines)(1)

Table4.8 Number of searching result pages usually being checked (users of

different search engines)(2)

Figure4.4 Perspective on the importance of search engines (users in different cities)

Figure4.4 Perspective on the importance of search engines (users in different cities)

Figure4.5 Perspective on the importance of search engines (users of different search engines)

Figure4.6 Perspective on the importance of search engines (heavy searchers and light searchers)

Figure4.7 Satisfactory degree towards search engines (users in different cities)

Figure4.8 Satisfactory degree toward search engines (users of different search engines)

Figure4.9 Satisfactory degree toward search engines (heavy searchers and lighters)

Table4.9 Suggestions on how to improve search engines (users of different cities)

Table4.10 Suggestions on how to improve search engines (users of different search engines)

Table5.1 Genders of different primary search engines' users

Figure5.1 Genders of different primary search engines' users

Table5.2 Ages of different primary search engines' users

Figure5.2 Ages of different primary search engines' users

Table5.3 Ages of different primary search engines' users (non-student users)

Table5.4 Educational degrees of different primary search engines' users

Figure5.3 Educational degrees of different primary search engines' users

Table5.5 Educational degree of different primary search engines' users (non-student users)

Table5.6 Educational degree of different primary search engines' users (student users)

Table5.7 Occupations of different primary search engines' users

Figure5.4 Proportion of student users of different primary search engines

Table5.8 Monthly income of different primary search engines' users

Figure5.5 Monthly income of different primary search engines' users

Table5.9 Monthly Income of different primary search engine's users (non-student)

Table5.10 Internet accessing frequency of different primary search engines' users

Table5.11 Weekly online time of different primary search engines' users (in hours)

Table5.12 Searching frequency of different primary search engines' users

Figure5.6 Primary search engines' market shares (in different age groups)

Figure5.7 Primary search engines' market shares (in different educational degrees)

Figure5.8 Primary search engines' market shares (for student/non-student users, in educational degrees)

Figure5.9 Primary search engines' market shares (in occupations)

Figure5.10 Primary search engines' market shares (for non-student users, in monthly income)

Figure5.11 Primary search engines' market shares (for heavy searchers and lighters)

Table6.1 Opinions on ranking search results (users of different search engines)

Figure6.1 Cognition of rank bidding (all users)

Figure6.2 Opinions on rank bidding (all users)

Table6.2 Cognition of rank bidding (users in different cities)

Table6.3 Opinions on rank bidding (users in different cities)

Table6.4 Cognition of rank bidding (users of different search engines)

Table6.5 Opinions on rank bidding (users of different search engines)

Figure6.3 Cognition comparison – rank bidding (all users and high-end users)

Figure6.4 Opinions comparison - rank bidding (all users and high-end users)

Table6.6 Statistics of clicking the right hand side product column (being ranked by bidding; all users and users in different cities)

Table6.7 Statistics of clicking the right hand side product column (being ranked by bidding; users of different search engines)

Figure7.1 Have you ever search for personal information and succeeded (all users)

Figure7.2 Opinions on search engine record users' search activities (all users)

Table7.1 Have you ever search for your own name (users in different cities)

Table7.2 Have you ever got private information by searching names (users in different cities)

Table7.3 Are you willing to let search engine companies record search activities
(users in different cities)

Figure7.3 Viewpoints comparison – record personal search activities (all users and
high-end users)

Table7.4 Cognition of Chinese name for Google (users in different cities)

Table7.5 Opinions on the Chinese name for Google (users in different cities)

Figure7.4 Cognition comparison – Chinese name for Google (all users and Google
users)

Figure7.5 Viewpoints comparison – Chinese name for Google (all users and Google
users)

Figure7.6 Cognition of Chinese name for Google (high-end users)

Figure7.7 Opinions on the Chinese name for Google (high-end users)

A Brief Introduction of CNNIC

General Information:

China Internet Network Information Center (CNNIC), the state network information center of China, was founded as a non-profit organization on Jun. 3rd 1997.

CNNIC takes orders from the Ministry of Information Industry (MII) to conduct daily business, while it was administratively operated by Chinese Academy of Sciences (CAS). Computer Network Information Center of Chinese Academy of Sciences takes the responsibility of running and administrating CNNIC. CNNIC Steering Committee, a working group composed of well-known experts and commercial representatives in domestic Internet community supervises and evaluates the structure, operation and administration of CNNIC.

Main Business:

1. Domain Name Registry Service

In light of the authorization of the governmental authorities, CNNIC takes the responsibility of China's domain name registry to operate and administrate ".CN" country code top level domain (ccTLD) and Chinese Domain Name (CDN) system.

2. IP Address and Autonomous System Number (AS Number) Allocation Service

As a National Internet Registry (NIR) of Asia-Pacific Network Information Center (APNIC), CNNIC initiated the IP Allocation Alliance, providing IP address and AS Number application services to domestic ISPs and users.

3. Catalogue Database Service

CNNIC is responsible for setting up and maintain the state top level network catalogue database, providing information search services of Internet user, web address, domain name, AS number and so on.

4. Technical Researches on Internet Addressing

For the sake of keeping pace with the global development of the Internet addressing, CNNIC carries out relevant technical researches and takes on technical projects of the state based on its administrative and working experiences on traditional network technologies.

5. Internet Survey and Relevant Information Services

Since the forming of CNNIC, it has actively carried out series of statistical surveys on the Internet information resources for public welfare. The authority and objectivity of CNNIC's statistical survey reports were wildly recognized by domestic and international communities. Some of indexes were brought into the National Informatization Quotient (NIQ). Furthermore, CNNIC also provides the Internet technical query services, CNNIC certification trainings and issue website pageview certifications to the society.

6. International Liaison and Policy Research

As the national network information center (NIC), CNNIC maintains cooperative relationship with many International Internet Communities, working closely with NICs of other countries.

7. Secretariat of the Internet Policy and Resource Committee, Internet Society of China (ISC)

The aim of the committee is to stand on a forward position of the Internet development; actively participate in the research work on the domestic Internet development and administration policies; provide policy and legislation oriented suggestions to promote the healthy growth of China's Internet; facilitate the development and application of Internet resources and relevant technologies; discuss on application and administration pattern of these Internet resources; perfect the survey of information resources on the Internet and relevant information services; unite with domestic Internet communities and carry out international communication and cooperation regarding Internet addressing technologies and administration policies.