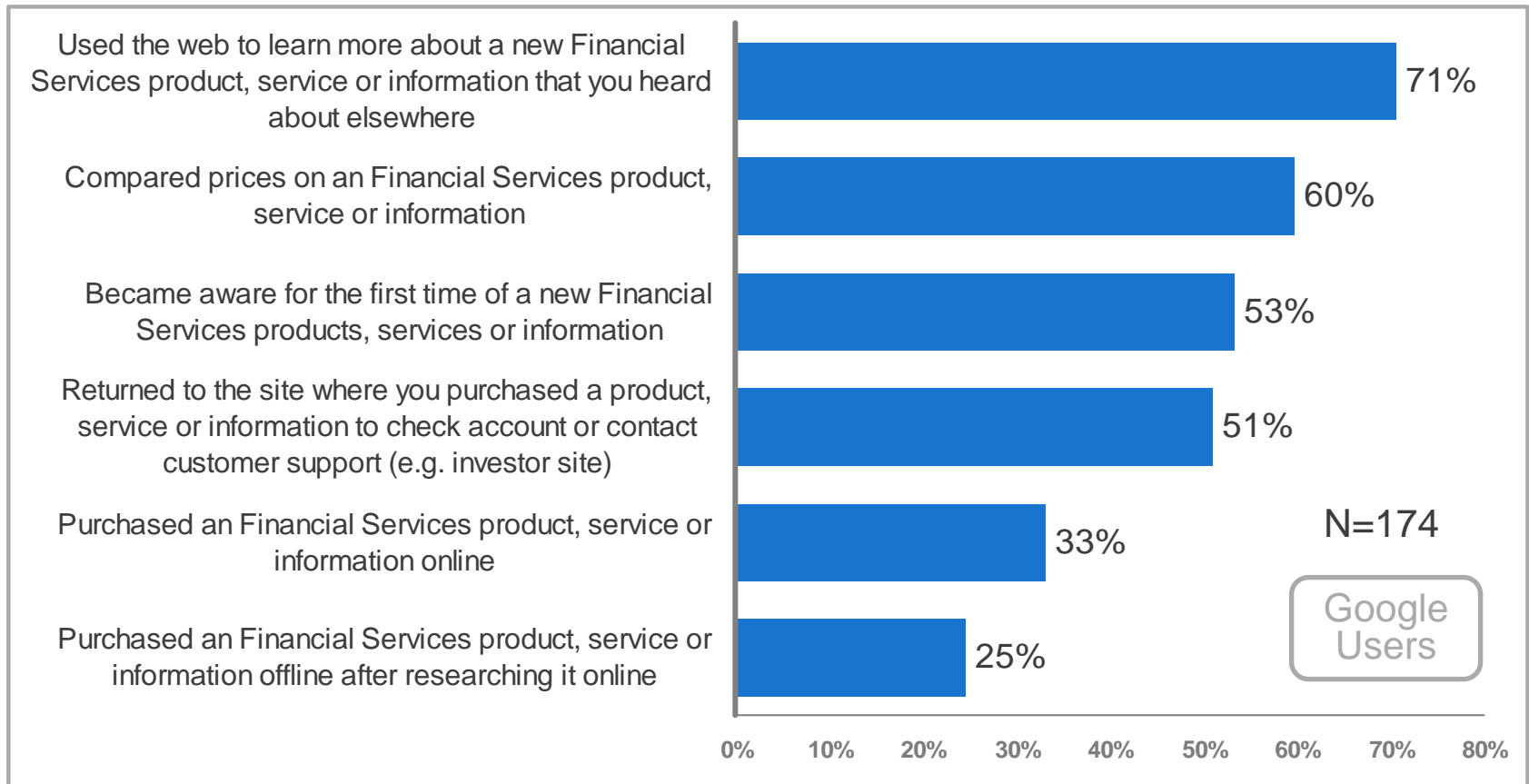


We surveyed a total of 300 consumers that use the web to research and/or purchase Financial Services

- A custom survey instrument (i.e. questionnaire) was developed to measure respondents' use of the web, and search engines in particular, for researching and purchasing Financial Services
- The survey was conducted online, through a web-based interviewing process, in August 2004
- Our sample is evenly distributed across all age groups and genders
- 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 sampling and data collection provided by Insight Express

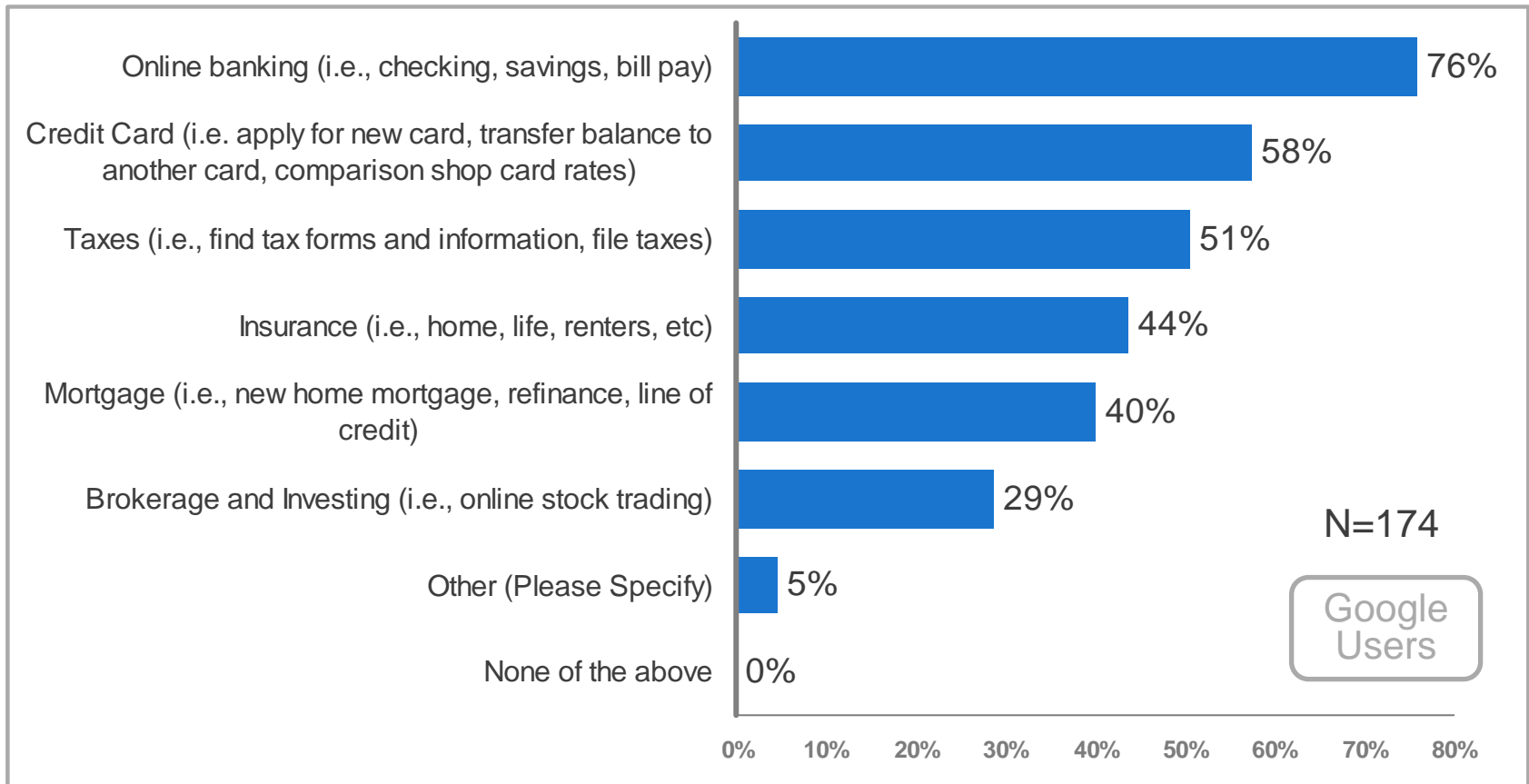
- The **Web is the most preferred** way for Google users to learn about Financial products and services, topping all offline methods by a 50% (online) to 24% (local branch) margin
- Google users go online to purchase a wide array of Financial products and services; 76% of Google users have researched **online banking**, while 58% have researched **credit card related services and information**
- Search engines play a significant role in helping consumers **find more (60%) or new information (59%)** about Financial products and services
- Google users purchase Financial products and services **online (51%) as well as offline (43%)**, such as at a branch location
- 74% of Google users **return to a selected Financial Services institution** for additional products and services

Nearly 3 in 4 Google users have gone online to learn more about Financial products and services



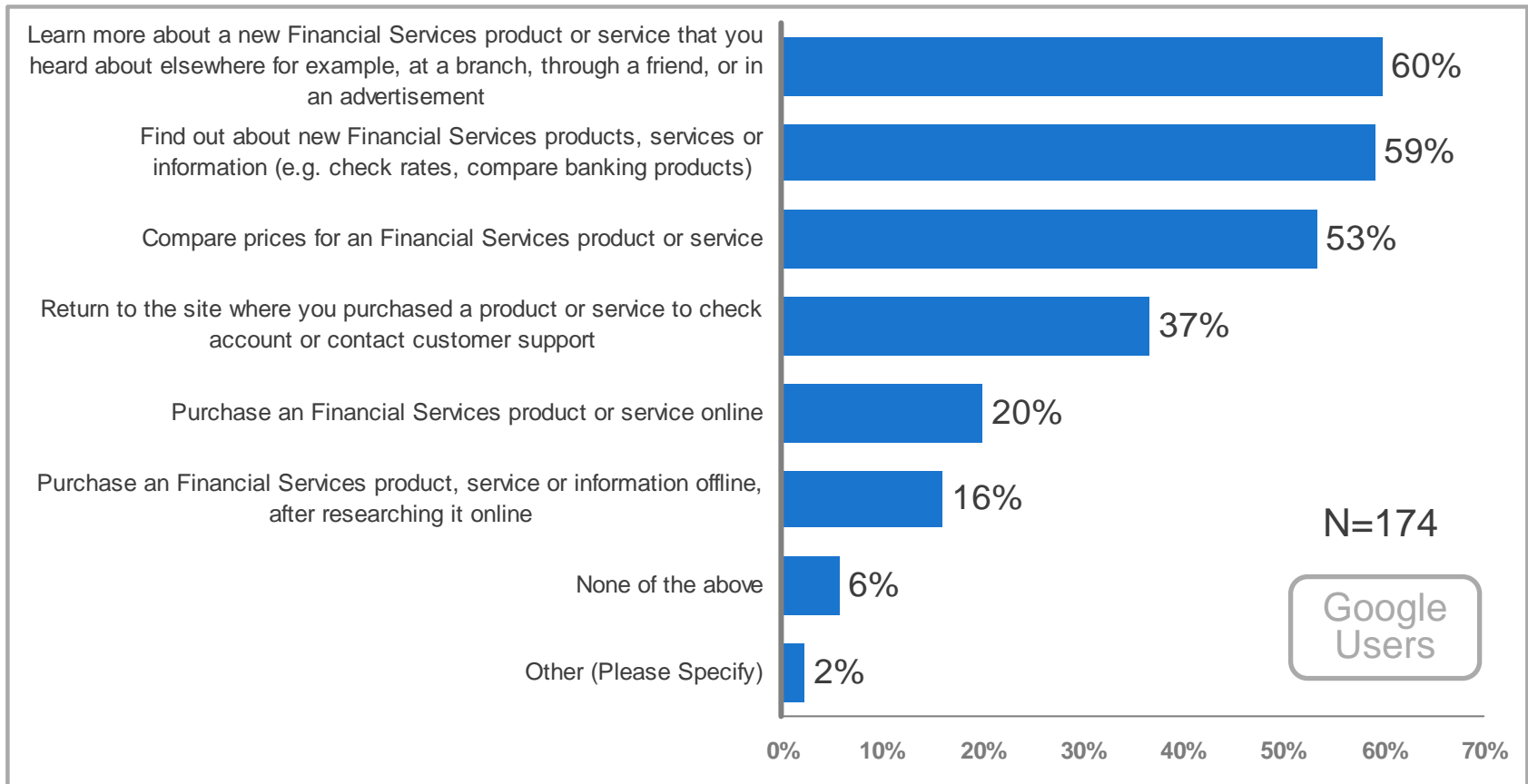
Q. Have you ever done any of the following online? (Please select all that apply.)

Google users go online to purchase a wide array of Financial products and services; **3 in 4** Google users have researched Online Banking



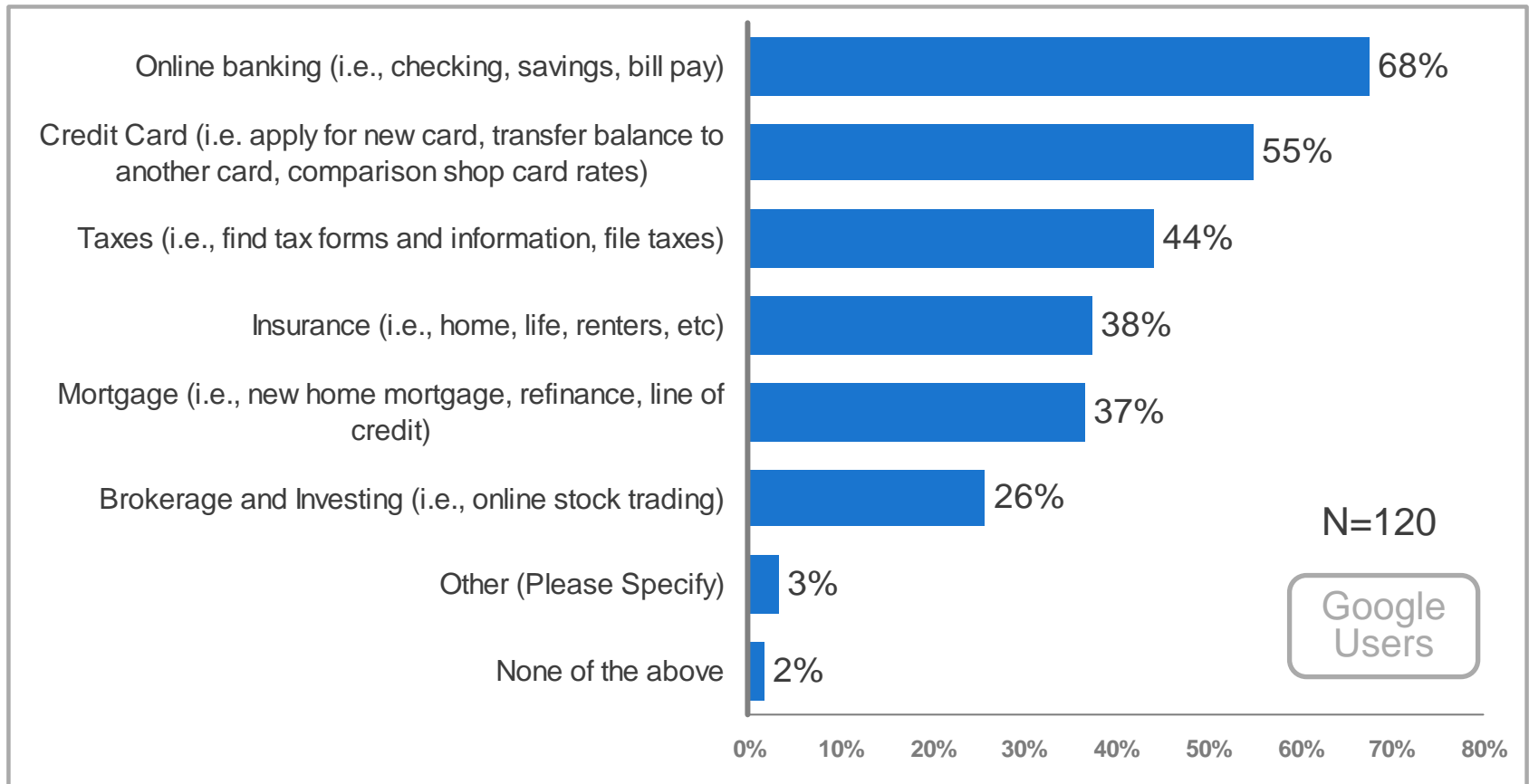
Q. You indicated that you have researched or purchased Financial Services products, services or information online. What kinds of items did you research or purchase? (Please select all that apply.)

Search engines play a significant role in helping consumers find more information about Financial products and services



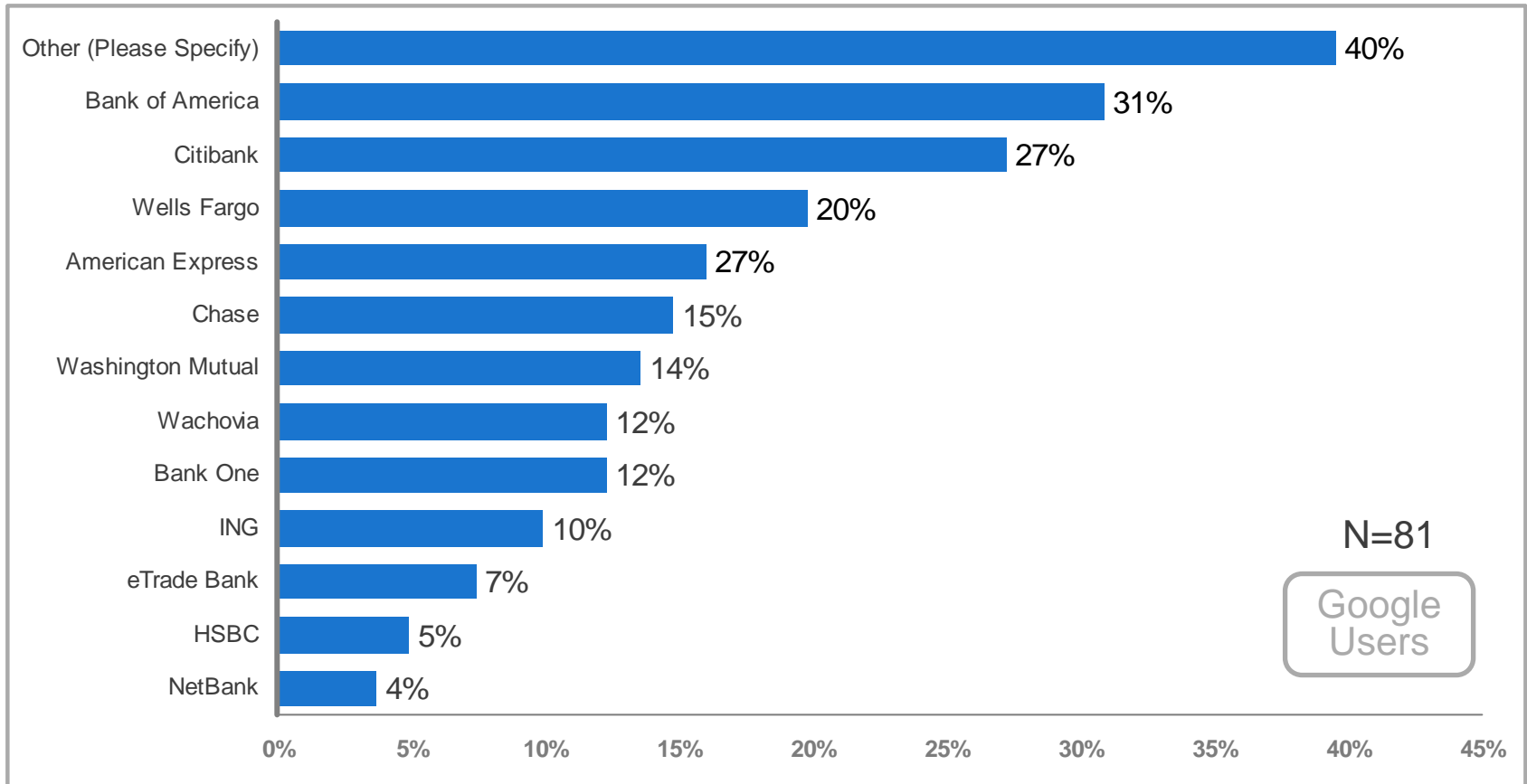
Q. Which of the following activities do you use a search engine to help you to do? (Please select all that apply.)

Search engines play a significant role in helping consumers find company websites for a range of Financial products and services



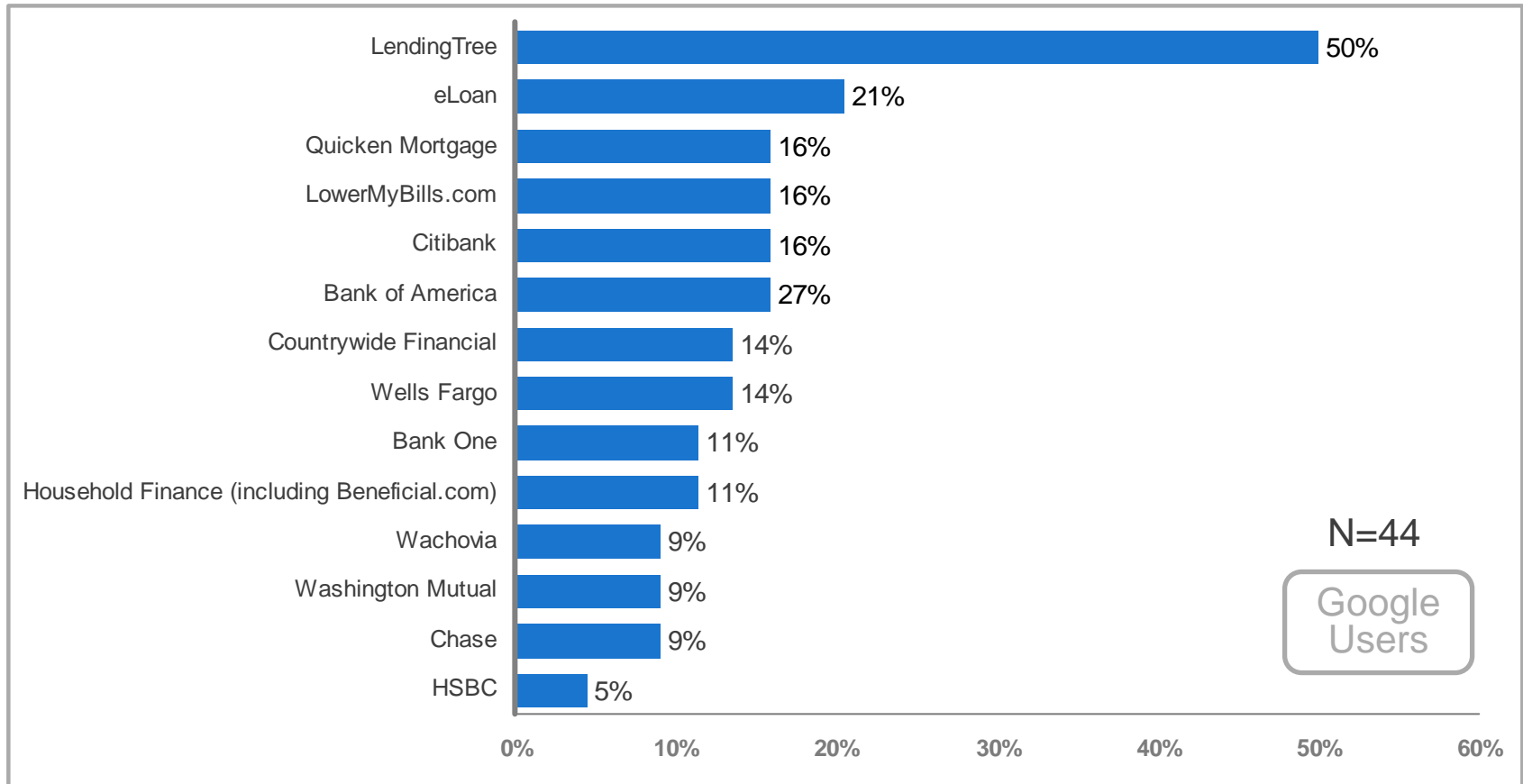
Q. What kinds of sites for Financial Services products, services and information have you used a search engine to help you find? (Please select all that apply.)

Consumers Search For Online Banking Websites



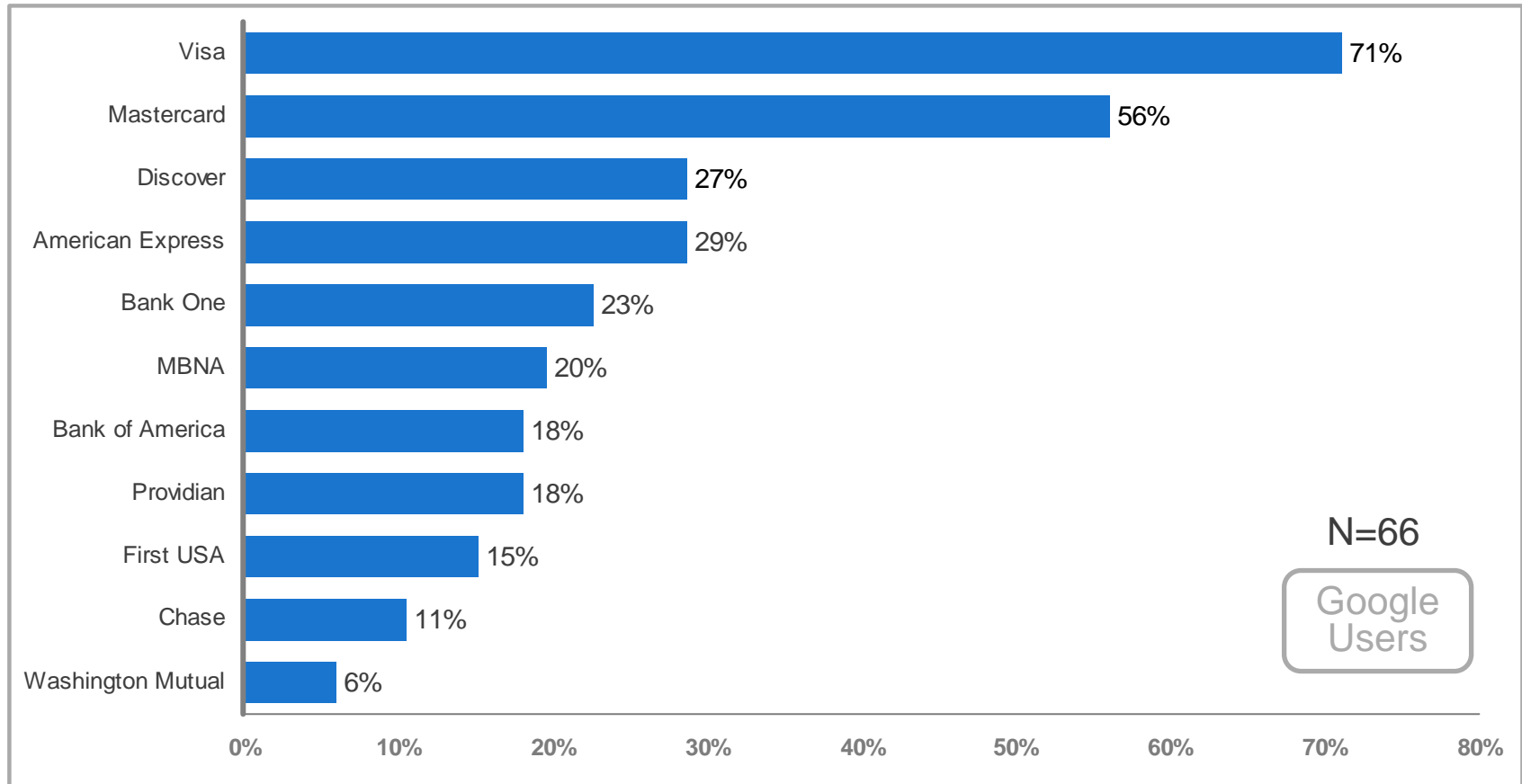
Q. You indicated that you have used a search engine to locate sites for Online Banking products, services and/or information. Which of the following sites have you used a search engine to help you find? (Please select all that apply.)

Consumers Search For Mortgage Websites



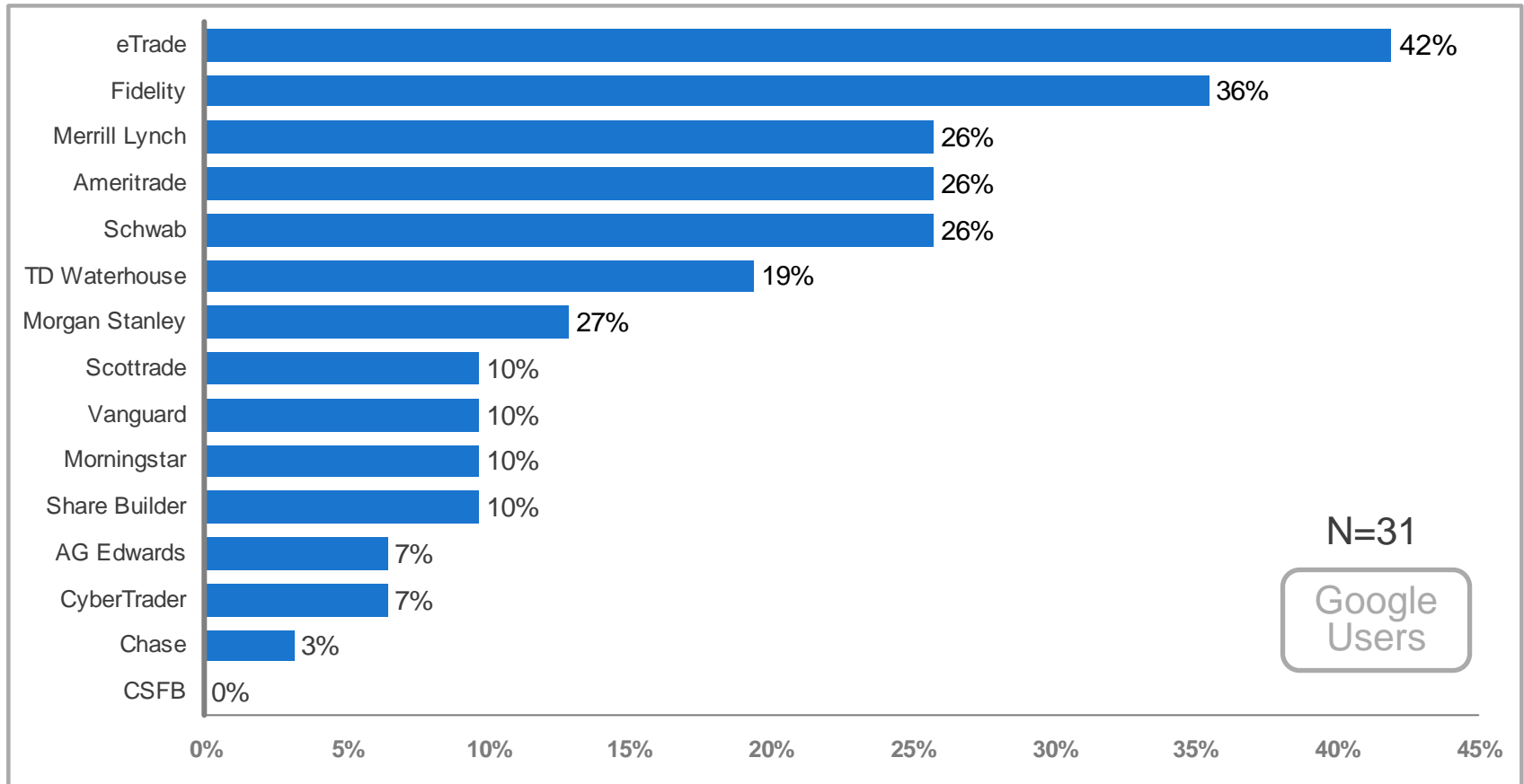
Q. You indicated that you have used a search engine to locate sites for Mortgage products, services and/or information. Which of the following sites have you used a search engine to help you find? (Please select all that apply.)

Consumers Search For Credit Card Websites



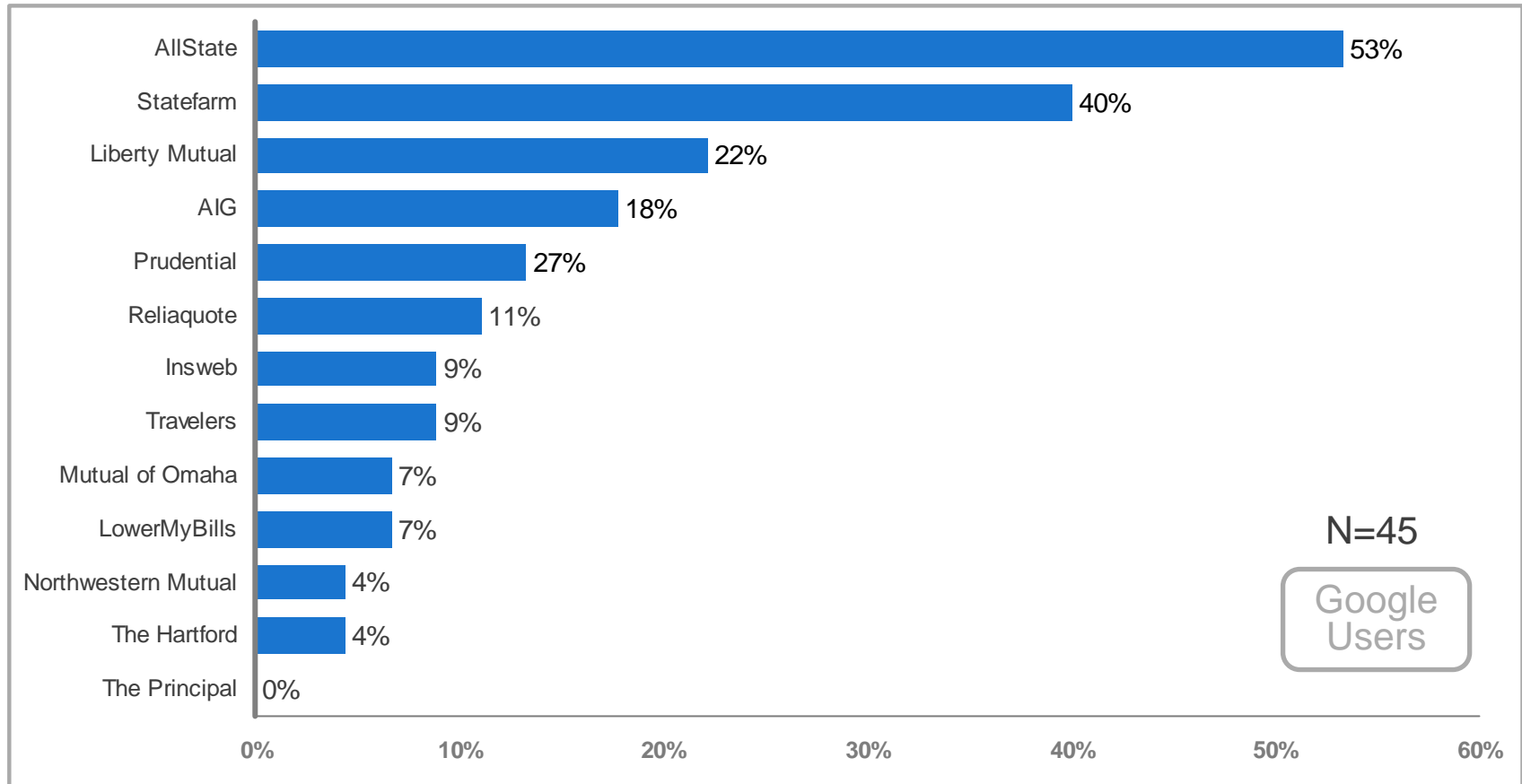
Q. You indicated that you have used a search engine to locate sites for Credit Card products, services and/or information. Which of the following sites have you used a search engine to help you find? (Please select all that apply.)

Consumers Search for Brokerage and Investing Websites



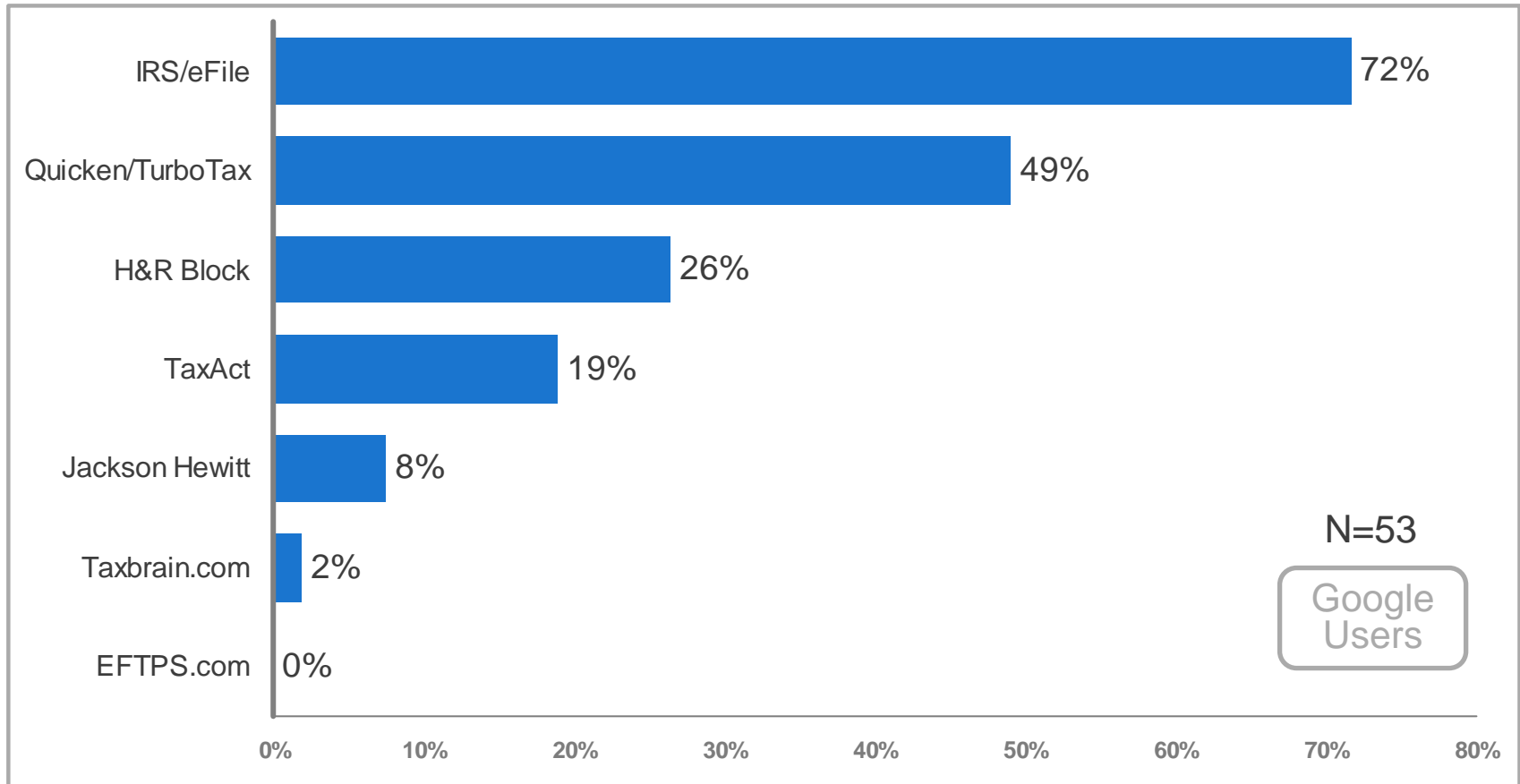
Q. You indicated that you have used a search engine to locate sites for Brokerage and Investing products, services and/or information. Which of the following sites have you used a search engine to help you find? (Please select all that apply.)

Consumers Search for Insurance Websites



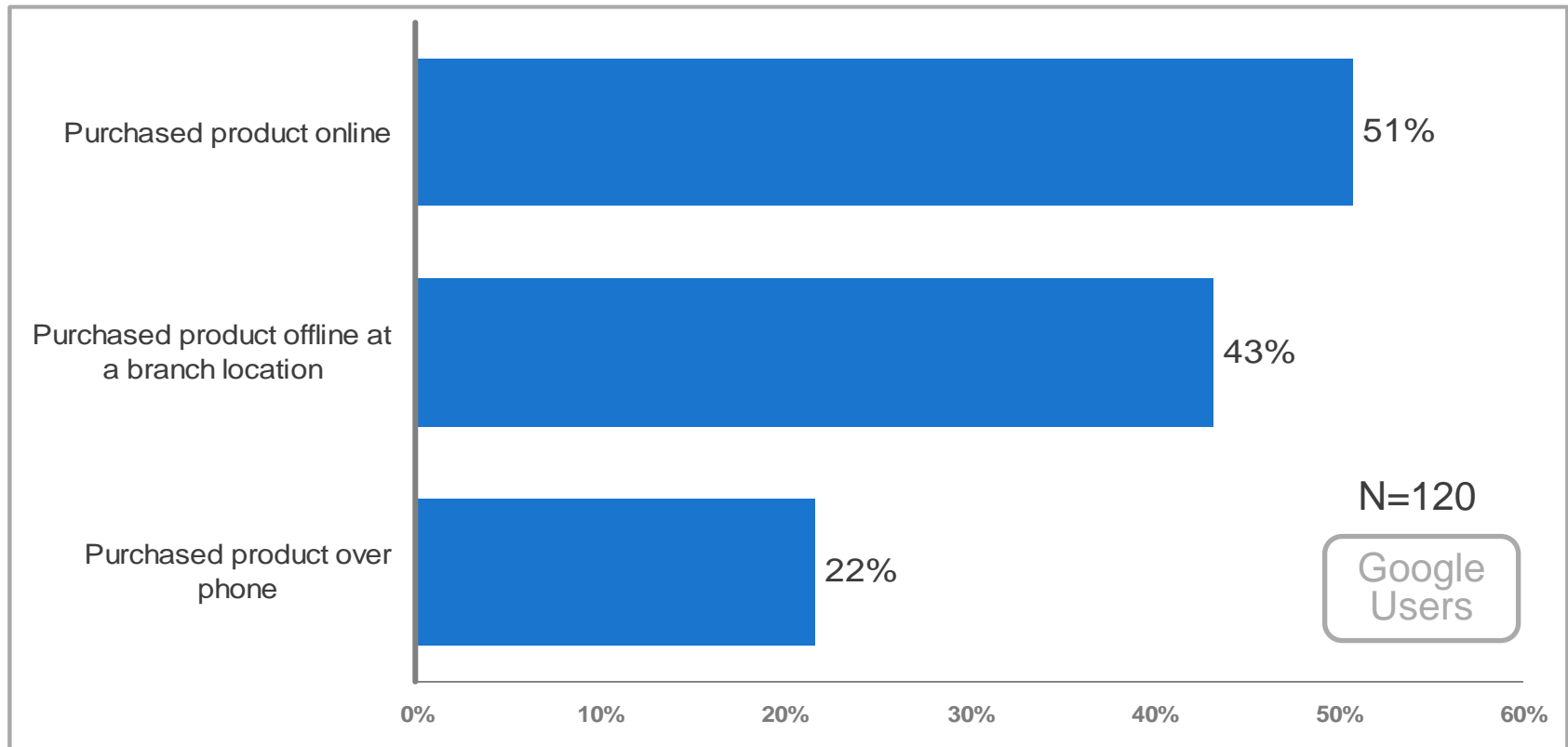
Q. You indicated that you have used a search engine to locate sites for Insurance products, services and/or information. Which of the following sites have you used a search engine to help you find? Please include home, life and/or renters insurance. Please DO NOT include auto insurance. (Please select all that apply.)

Consumers Search For Tax Websites



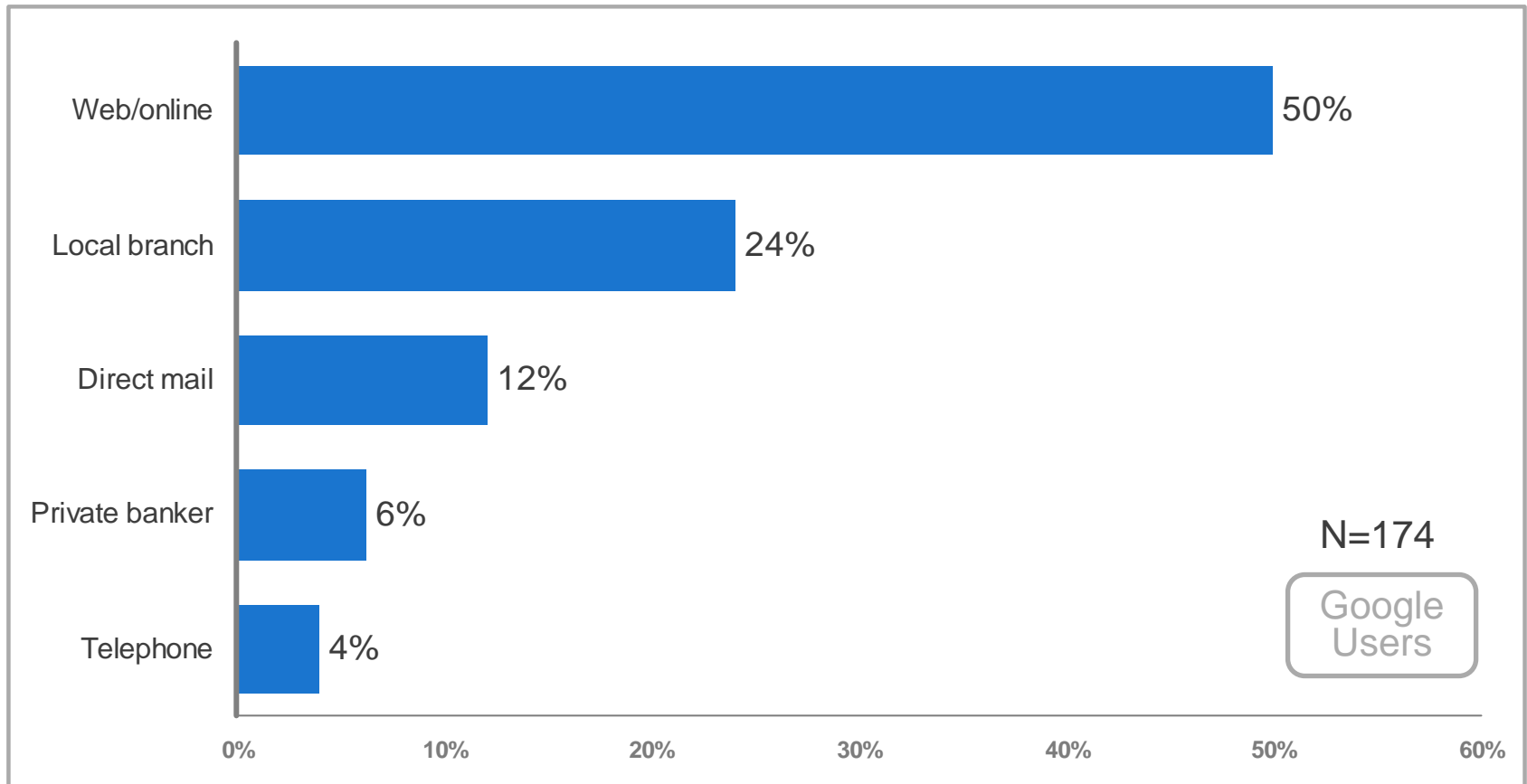
Q. You indicated that you have used a search engine to locate sites for Tax products, services and/or information. Which of the following sites have you used a search engine to help you find? (Please select all that apply.)

Searchers purchase Financial products and services online as well as offline, such as at a branch location



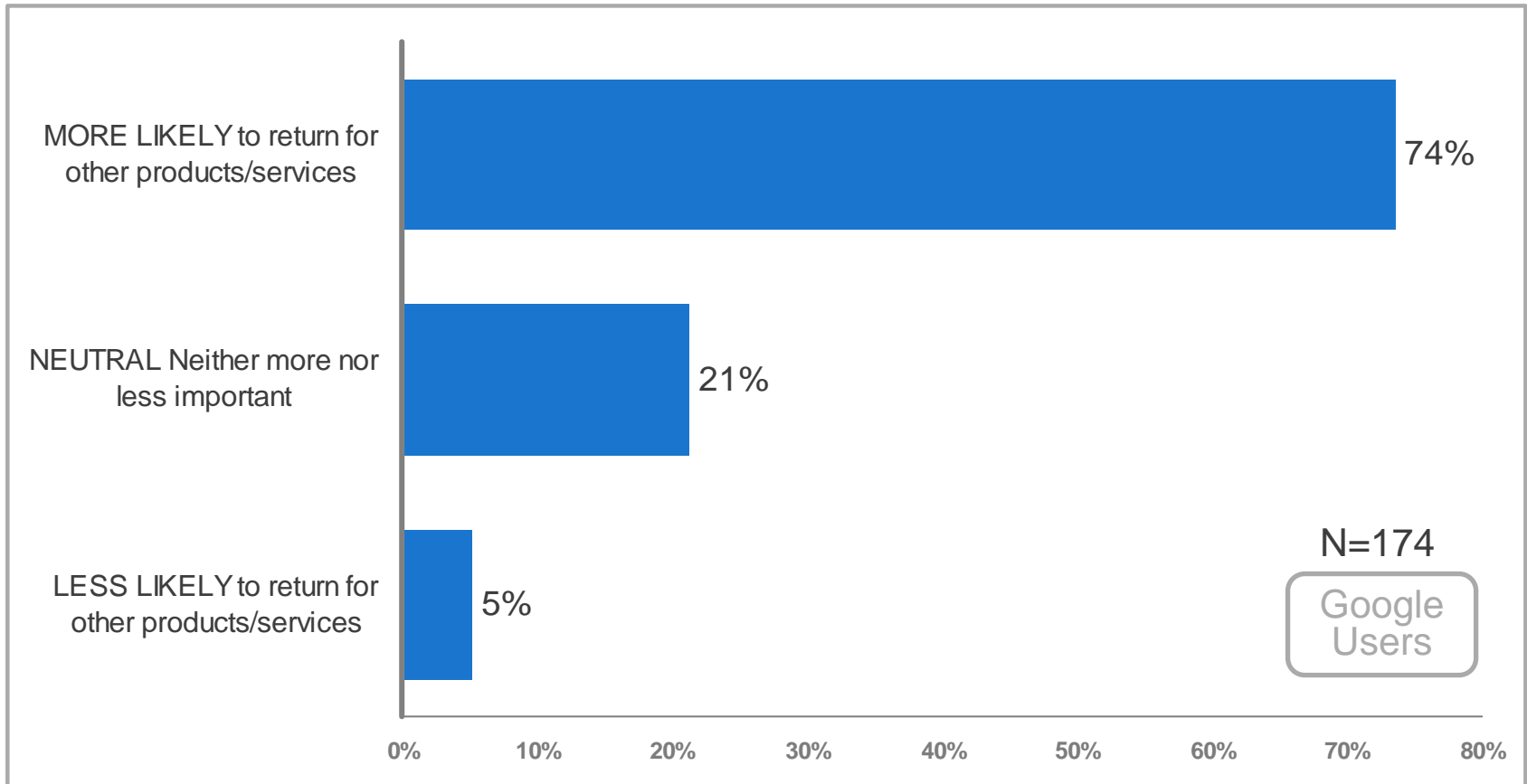
Q. After using a search engine to help you find a website for Financial products, services and/or information did you eventually purchase products either online or offline at a branch location or by phone? (Please select all that apply.)

The Web is the most preferred way to learn about Financial products and services, topping all offline methods



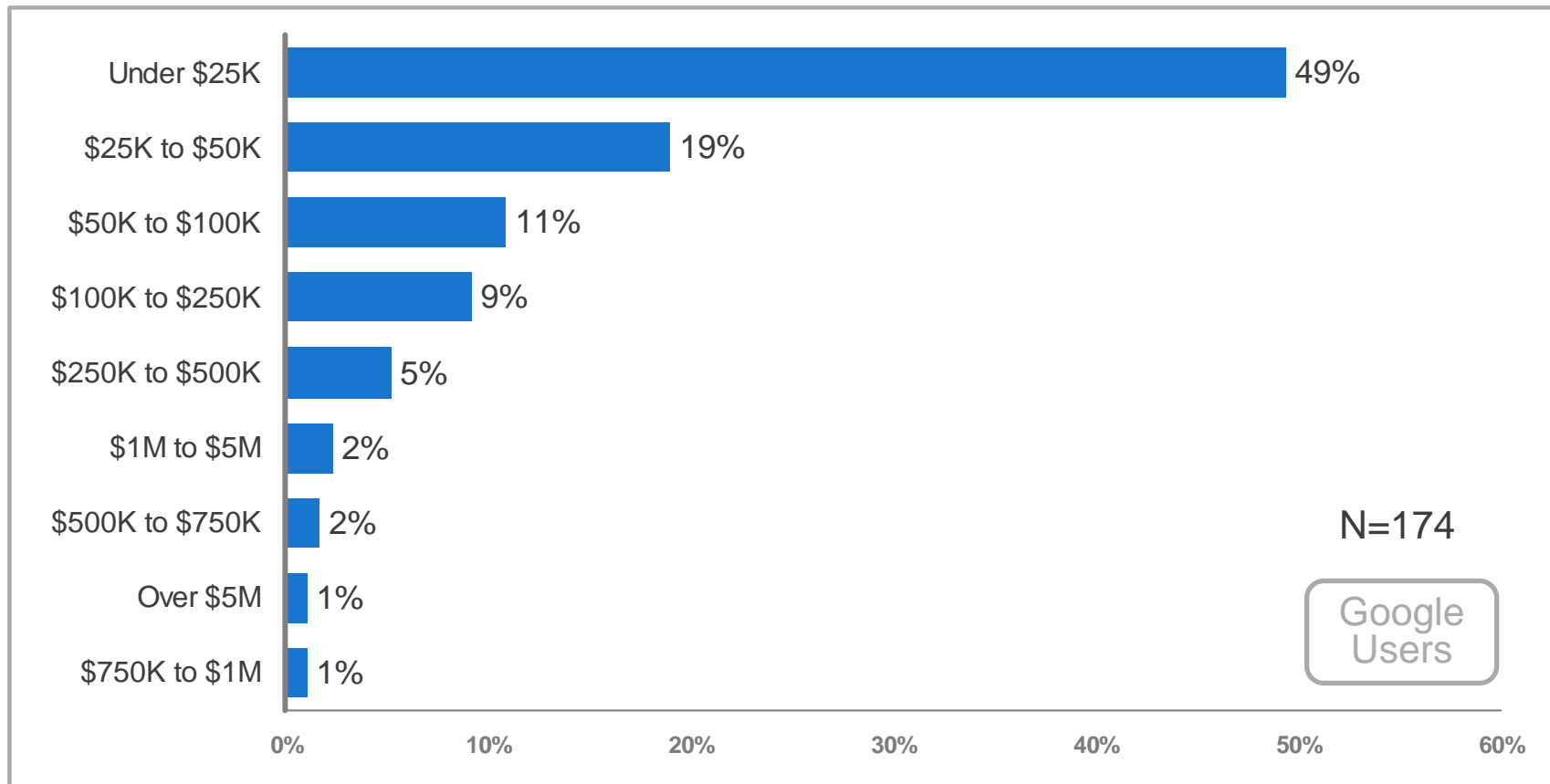
Q. How do you prefer to learn about and/or purchase Financial products, services and information?

Nearly 3 in 4 Google users return to a selected Financial Services institution for additional products and services



Q. After you select a financial services provider, are you more or less likely to go back to that financial institution for other products, services or information in the future?

Half of all Google users have investments totaling under \$25K; two in five have investments between \$25K and \$50K



Q. Approximately what is the total value of your investments, not including real estate?