

Unified Search – Search 2.0 Trends

Emerging Media Brief from DoubleClick Performics
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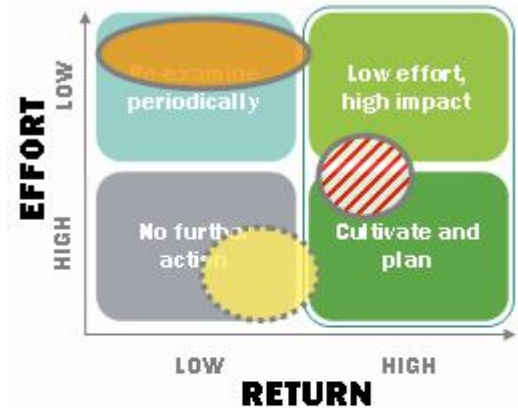
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Overview

- DoubleClick Performics is initiating coverage of a trend we call “unified search.” This trend is one component in the overall evolution of “Search 2.0,” as it reaches consumer critical mass with the release of unified search into the main search results pages of Google and Ask.
- Unified search is a new approach to the presentation of natural search results, where content, beyond simple HTML pages and the inclusion of specialized vertical content (such as blog posts, videos, images, book content, news, Wikipedia entries, etc), is integrated into the main search results page.
- DoubleClick Performics believes that unified search will create a more satisfying searcher experience as it continues to evolve. This will likely contribute to the ongoing increase in the number of searches per user and the continued growth of paid search impressions.
- Unified search may have the side-effect of decreasing paid search click volume in cases where a significant proportion of traffic comes from topical areas addressed by the new vertical categories, particularly on Google, since the universal search listings stand out prominently among the rest of the text listings.
- Unified search will also expose and highlight content that was previously less prominent in the search results. This creates a small degree of risk for brand marketers with negative brand-related content bubbling to the top of the search results. For some marketers with rich image and video content, unified search may enable better engagement of the searcher on the search results page itself.
- Overall, DoubleClick Performics rates the current importance of unified search to online marketers as low to moderate. Effort required to perform natural search optimization for universal search appears to be high, with an advantage here going to marketers who possess image and video assets and have the ability to optimize them. The DoubleClick Performics Natural Search team can provide consultation in this area.
- Marketers are encouraged to evaluate and monitor their brand keywords on unified search engines, as well as continuing to optimize their press releases, images and video assets to increase the likelihood of their appearance in the natural search results.
- DoubleClick Performics will continue to monitor this trend and update this POV when there are significant changes to the players and the opportunities for marketers.



- Most PPC programs
- Clients with video and image assets
- PPC programs with significant traffic coming from local, news, video or image search queries

Effort = ease or difficulty of exploring, testing and managing the emerging opportunity.

Return = rewards of testing the opportunity, including learnings, first-mover advantage, as well as sales or leads, reach or consumer engagement.

DoubleClick Performics clients can contact their account team to better understand the specific implications of unified search for their online marketing campaigns.



Unified Search Defined

“Unified search” is DoubleClick Performics’ name for an emerging trend in the presentation of natural search results to searchers on general-purpose search engines. In the past, text listings pointing to HTML pages (and other text documents such as PDFs) made up virtually the entire search results page. Google has used its “onebox” area at the top of the natural search results to display maps and other local listings, as well as additional product listings. But other kinds of content have generally been one or two clicks away from the search results.

Unified search integrates vertical content into the main natural search results or displays it around those results. Images, videos, news and blog posts, previously accessible only by clicking between tabs in the results, are now allowed to “bubble up” into the main query results.

Two approaches are utilized to present unified natural search at this point:

- *Relevancy driven*: New content is integrated into the natural search results, mixing various kinds of content together with images, videos, news, etc. The content appears in-line with the HTML listings and all of it is ranked according to the engine’s relevancy algorithm. Google is taking this approach with its main search results on Google.com.
- *Content driven*: Creating a new type of search results layout with standardized content “holes” for each type of content. Whenever a minimal amount of vertical content is available for a query, the various content holes are filled and displayed around the natural search listings. Ask 3D, Kosmix, Yahoo’s Alpha and Google’s SearchMash are all taking this approach.

Unified search does not change the display of paid search listings on any of the engines using it at this point.

Impact to the Searcher’s Experience

As a result of these changes, DoubleClick Performics foresees two major areas of impact to the searcher’s experience:

Time spent on search: Receiving different types of content on your search page creates a new way of obtaining information. Particularly with content driven user interfaces, the new results page becomes a portal-like web page, allowing users to review breadth and depth of content in one place without clicking over to a separate “vertical” or specialty engine. The potential exists for these changes to increase the time users spend on an individual search engine.

Increased visibility and traffic for specialized content: Previously, searchers were often unaware of or ignored links to “vertical” or specialized engines. By ensuring there is a slot for such content on a results page or that the content is blended with the “regular” content based on relevancy, engines are exposing searchers to more in-depth material of which they were previously unaware.



Search Engine Players

Google Universal Search

Google launched its “Universal Search” results on May 16, 2007. Referred to as “a search engine for all of their search engines,” it includes results from selected Google “vertical” or specialized engines in the main search results. At launch, the new content included images, videos, maps and news. Google expects to include blog listings later in 2007 and additional vertical content “corpora” over time.

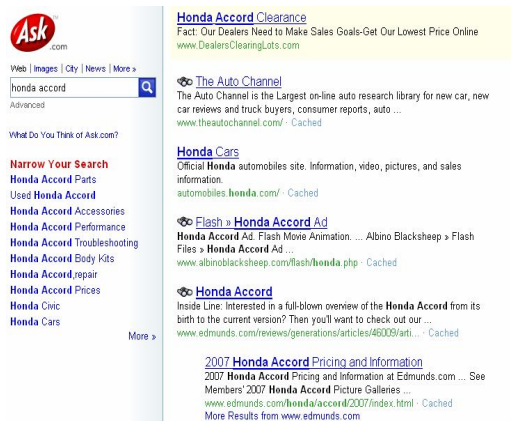
Relevancy of each item determines its rank on the page. Relevancy appears to be sensitive to the context of the search. For instance, Steve Jobs news listings are higher on the page three days before the launch of iPhone than they were in May.

Some preference is given in the algorithm to ensure a news, local and/or video listing appears in the first page of results when relevant to the search. News listings often rank tenth for brand and generic searches.

At launch, universal search seems to be applied to all types of queries. Google plans to add additional vertical content to the results and has particularly emphasized the importance of GoogleBase content, which will be fully integrated in results pages.

Ask 3D

Ask’s new 3D technology, launched on Ask’s main site in late May 2007, presents results in a three-column view, with suggested searches on the left, web search results in the middle, and image, news, shopping, video, and blog results on the left. Ask uses AJAX effects, like a fade transition between search results pages and scrolling of the main search area to create an engaging user





experience. Ask differs from Google but is similar to SearchMash and Alpha in its approach to unified search in that images, blogs and video bits are not blended into the results according to overall relevancy, but slotted into a space at the top of the results page, according to their own algorithmic hierarchy. This ensures the new content formats are seen, however the downside could be that users may feel “force fed” less relevant content. It does appear that Ask only displays the right column of vertical content when there is sufficient content to warrant it. Very specific brand and product searches most often show only text links.

Kosmix

Referring to itself as a content categorization engine, Kosmix takes an entirely different approach to unified search. Kosmix first forces the searcher to narrow the queries to a specific industry vertical, such as finance, health, law, travel, etc. Once the user picks an industry vertical, they reach a “top overview page” that organizes results from all types of relevant content (images, video, web pages, blogs, news, maps, etc.) into logical categories on the page. In some cases, interactive search or consumer applications are integrated in the results. For example when someone searches the travel vertical a sponsored online travel agency fare search tool occupies the right hand panel of the page. The result of this approach is breadth and depth of content and in turn extremely relevant results within a specific niche or industry.

The screenshot shows the Kosmix website interface for a search on 'Delhi'. The page is organized into several vertical sections:

- Wikipedia:** A brief overview of Delhi as the second-largest metropolis in India.
- Focus by Traveler:** A horizontal menu with categories like Family Travel, Pet Friendly, Adventure, etc.
- Best of Travel: Delhi:** A section featuring 'Delhi Vacations | Away.com' and 'Delhi travel guide'.
- Explore Topic Map:** A sidebar with 'Tourist Attractions' (Jama Masjid, Humayun's Tomb), 'Destinations' (Delhi India, Louisiana, New York), '5 Star Hotels' (Hyatt Regency, The Park), and '4 Star Hotels' (Radisson, Metropolitan).
- Travel Search:** A large, prominent search tool on the right side with fields for flight type, departure, return, and class of service.
- Sponsored Links:** A section at the bottom right for 'Delhi Photos'.

Google's SearchMash

Unknown to most users, SearchMash is a Google “lab” site used to test their latest search innovations. SearchMash resembles the Ask.com and Yahoo Alpha models: when you do a web search, web page results populate the left side and image, blog, video and wiki results appear as drop downs on the right. Users need to click each vertical section to load the new content. Google is undoubtedly testing competitive features that could have more significant impact on client optimization strategies in the future. Relevancy appears to be determined within each content hole.

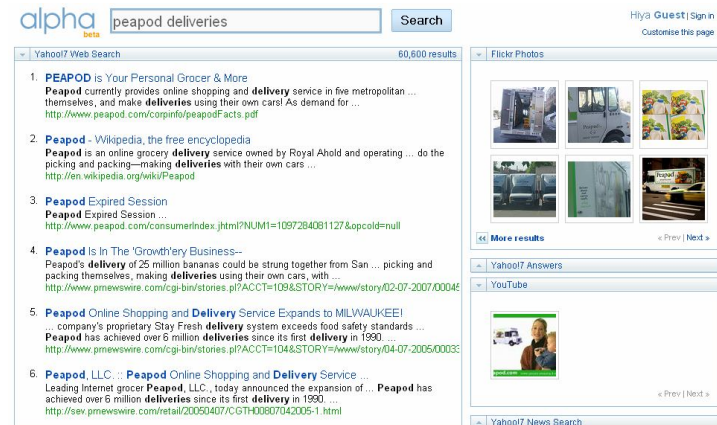
The screenshot shows the SearchMash website interface for a search on 'bose'. The results are presented in a vertical list on the left side, with additional content shown in drop-down menus on the right:

- Web Pages:** A list of search results for 'bose', including links to Bose's official website, SoundDock digital music system, professional products, and contact information.
- Images:** A vertical strip of image results for 'BOSE'.
- Blogs:** A vertical strip of blog results for 'bose'.



Yahoo! Alpha

Yahoo!'s Alpha, does essentially the same thing as Google's SearchMash does: display web page results side by side with images, video and blog results from across their properties. The difference is that Alpha search results are presented in a two-pane display with results from Yahoo!'s web search, News, and Answers properties, as well as Flickr, and non-Yahoo! properties like YouTube and Wikipedia. As with Searchmash, it appears that ranking and relevancy is determined within each separate content slot.



The Impact to Marketers

Google Universal Search – Search Traffic Implications

There has been some speculation that Google Universal Search is impacting natural search visit volume for certain types of queries. With Google effectively replacing up to three of the previous natural search listings with new “vertical” listings for news, images and videos, other well-ranked listings are pushed down the page, in many cases out of the first three or four listings where most natural search clicks occur.

There are also early indications that some paid search programs are seeing reductions in click volume related to universal search. When a significant proportion of traffic volume is being driven by queries directly relevant to the new vertical content, the universal search listings appear to attract a significant portion of the total clicks from the page, not just the natural search clicks.

The net effect to date indicates that the most significant shifts are among Google vertical search properties; Google Maps has nearly doubled its share of Google's downstream traffic and YouTube's share increased by one third. Overall, there has been a slight shift of downstream share to Google.com properties and away from some of the top non-Google content and commerce traffic recipients. While DoubleClick

Performics has not seen natural search traffic decreases directly attributable to Google Universal Search with our natural search clients, we continue to monitor the potential impact.

% of Google.com's total downstream traffic going to other Google and non-Google sites*

3 months prior and 1 month post launch of universal search on May 15, '07
Source: Hitwise

Sites	Prior Month Avg (Feb-Apr '07)	June '07	June change over Prior Month Avg
images.google.com	5.15%	4.78%	-7.1%
www.youtube.com	0.65%	0.90%	37.7%
maps.google.com	0.39%	0.73%	88.7%
video.google.com	0.62%	0.67%	8.1%
news.google.com	0.47%	0.44%	-4.8%
base.google.com	0.03%	0.04%	46.0%
Google properties	7.29%	7.56%	3.6%
www.wikipedia.org	1.98%	1.81%	-8.5%
www.ebay.com	1.02%	0.98%	-3.8%
www.amazon.com	0.67%	0.65%	-3.4%
www.imdb.com	0.46%	0.46%	0.3%
www.mapquest.com	0.35%	0.44%	27.6%
www.tripadvisor.com	0.09%	0.09%	4.9%
non-Google sites	4.56%	4.43%	-2.8%

* selection of content sites making up a significant portion of Google's downstream traffic



Visibility of User Generated Content

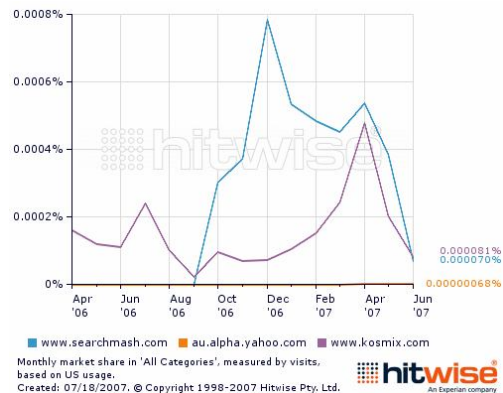
Unified search will expose and highlight some kinds of content that was previously less prominent in the search results.

This will create a small degree of risk for marketers with negative brand-related content bubbling to the top of the search results. However, this risk is not substantially greater than the current risk of negative web sites showing up in text search listings. At this stage of development, it does not appear that brand searches on Google or Ask highlight unfavorable content, with Google's algorithm favoring the strong page rank and important content of brand name sites.

For example, United Airlines has always had a detractor site, utilizing the United brand name, displayed in the Google search results. Universal search does not change that, with untied.com still ranking in the top natural search results; however, now a popular United commercial shows up right in the search results, possibly attracting more attention from consumers than negative content.

The question still remains whether it will be possible or efficient to optimize video and images for universal search. A very small amount of highly popular, highly relevant vertical content is displayed on the first page of Google search. DoubleClick Performics will continue to explore this question and alert clients of the opportunities.

Alpha, SearchMash, and Kosmix, while growing among tech savvy early adopters, have minimal search volume compared to Google and Yahoo. Still, it would be wise to monitor these sites and begin assessing the potential challenges that arise from these new approaches. Currently, the largest challenge is irrelevant or negative videos, images or blog content slotted at the top of the page. These pre-reserved slots would allow them to gain more visibility than they would be able to get in a typical blended search result.



Clients should continue to seed as many vertical assets as possible into the social media sites. Ensuring that any available videos are shared on YouTube and images are posted on Flickr or optimized on the native site can provide the fodder for unified search listings. Image and video optimization can be challenging but also pays off well in traffic and visibility, regardless of the impact of unified search. We anticipate this new type of web content to gain more and more prominence in the average user's online experience. Unified search is another step in this direction. Marketers need to carefully consider the opportunity to engage consumers via these new channels, whether directly on the sharing sites, or indirectly through vehicles like unified search.