

# The Search Landscape

**The Search Imperative!  
Its Changing Nature, Continuing Impact**

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# The Search Landscape

- **What is Search?**
- **The Evolution of Search**
- **The Search Landscape Today**
  - The market
  - The players
  - The trends
- **3 Key Take Aways**

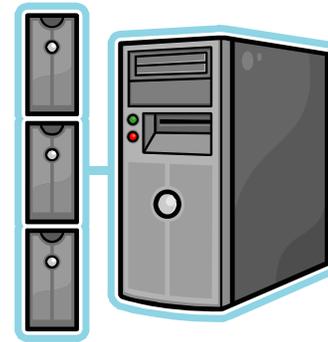
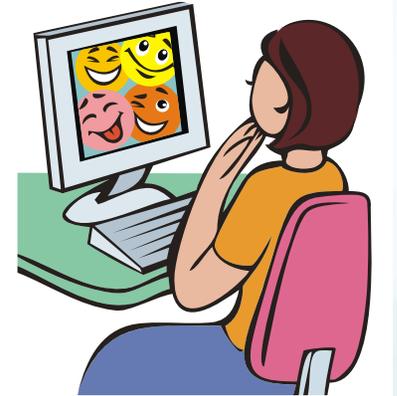
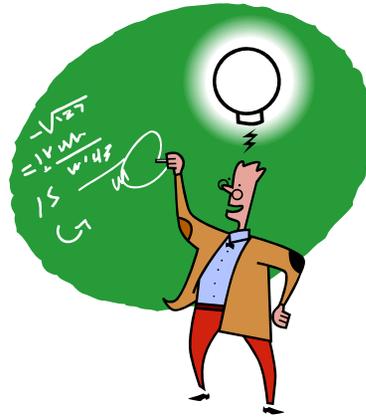
# What Is Search?

Defining the problem

# What Is Search?

## Is it ...?

- Algorithms
- Taxonomies
- People
- Technology
- Answers
- Revenue Models



$$\text{Revenue} = \text{Users} * \frac{\text{Queries}}{\text{User}} * \frac{\text{Ads}}{\text{Query}} * \frac{\text{Clicks}}{\text{Ads}} * \frac{\text{Revenue}}{\text{Click}}$$

# Search Is ... The Removal of Friction



- **Along three lines:**
  - Speed
  - Relevance
  - Ease of Use

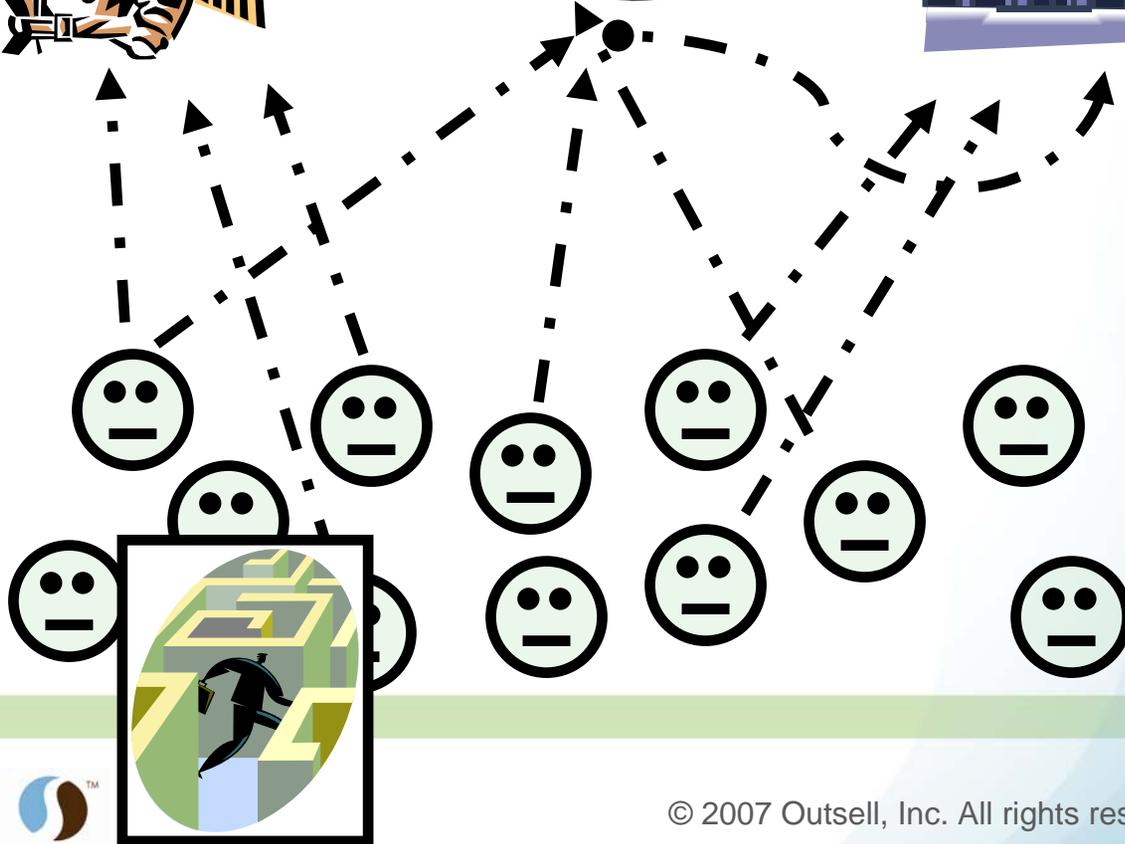
# The Evolution of Search

Four stages at play

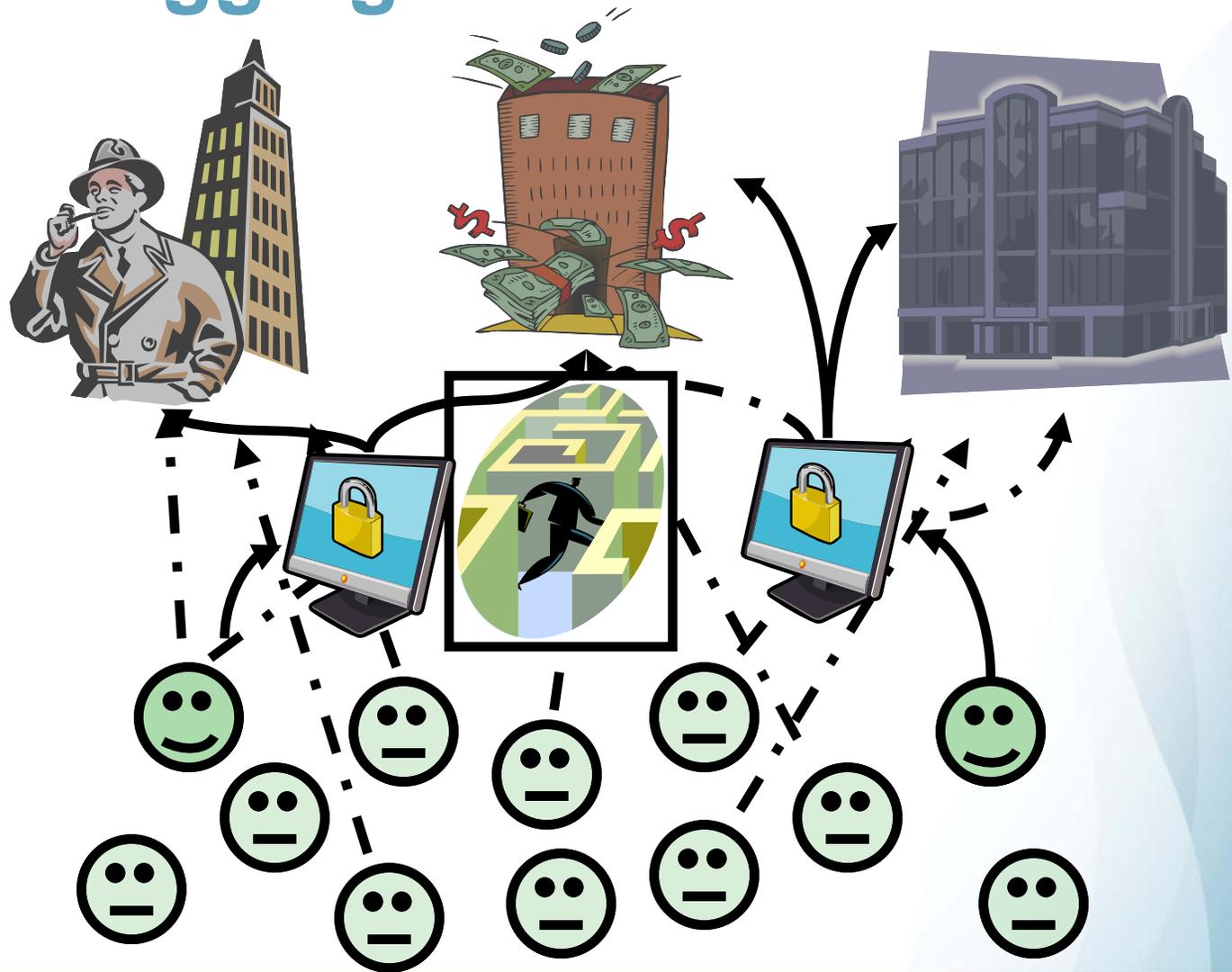
# Stage 1 – Distribution



- Publishers ruled
- Users struggled
- Researchers and distributors emerged

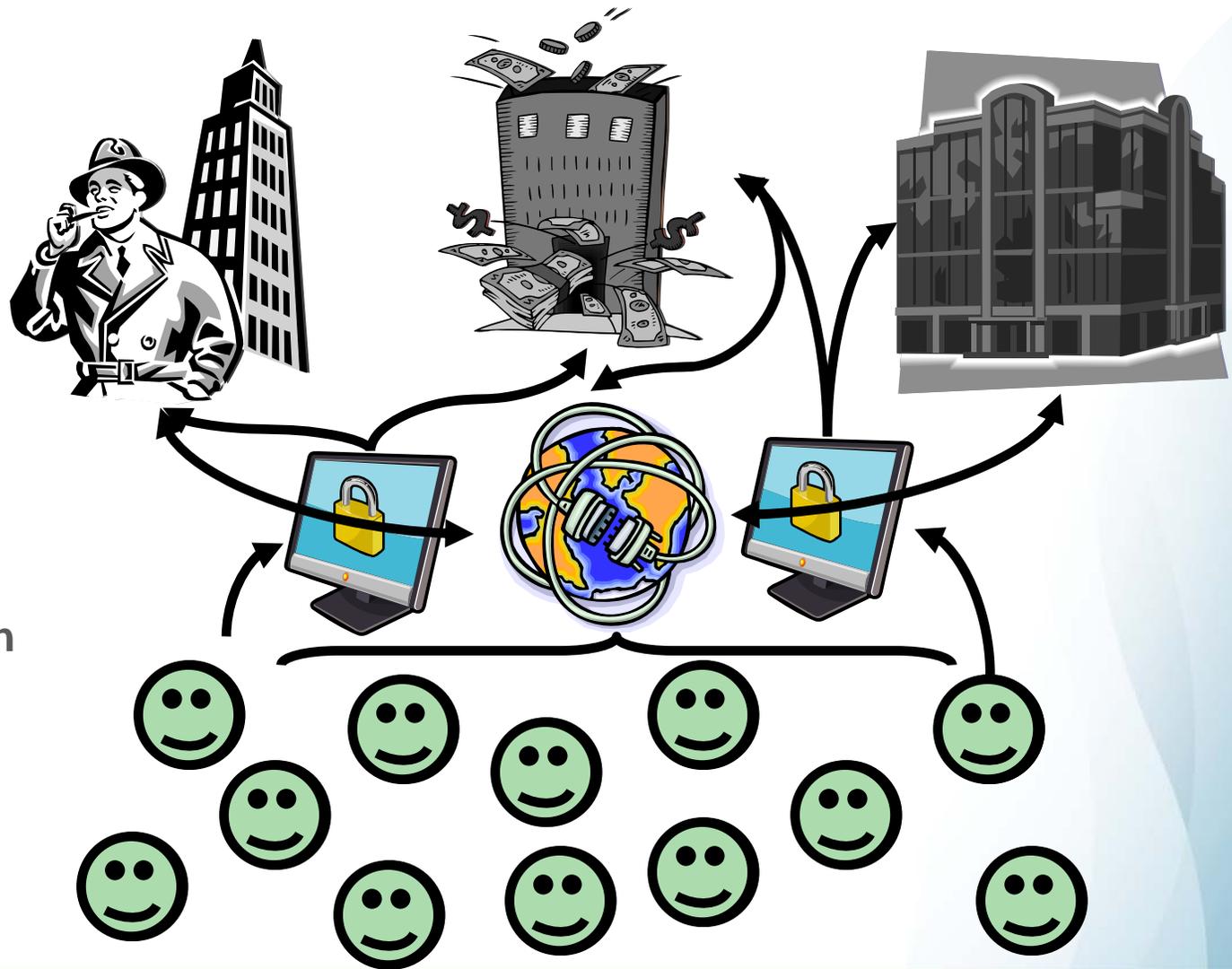


# Stage 2 – Aggregation



- Publishers maintained power
- Licensed aggregators emerged
- Some users got better access

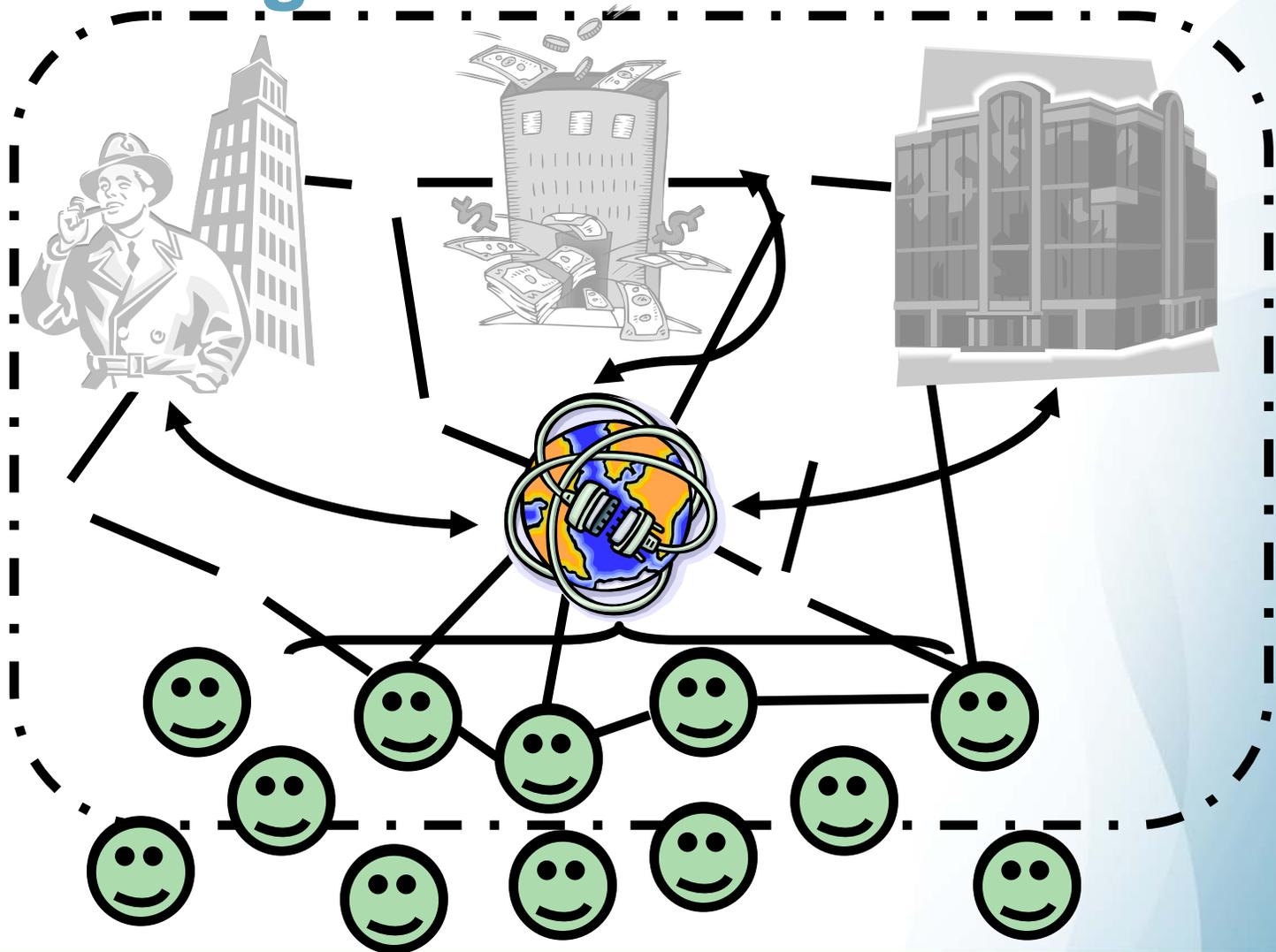
# Stage 3 – Dissemination



- Most users get better access
- Publishers cede control to web search
- Licensed aggregators hold on

# Stage 4 – Integration

- Network expands
- Users create and exchange
- Publishers maintain a voice



# Evolution of Search – Review

	Stage			
	#1 Distribution	#2 Aggregation	#3 Dissemination (Web Search)	#4 Integration (Social Networks)
Control / Power	Publishers	Publisher / Aggregators	Search portals/ Users	Networks / Users
Revenue model (primary)	Fee	Fee	Ads	??
Price per word	High	High	Low	Free?
Content ownership	Publishers	Publishers	No one	Everyone
Content creation	Publishers	Publishers	Publishers / Experts	Everyone
Visibility of search	Low	Moderate	High	Low

# The Search Landscape

Where are we today?

# We Remain in Stage 3

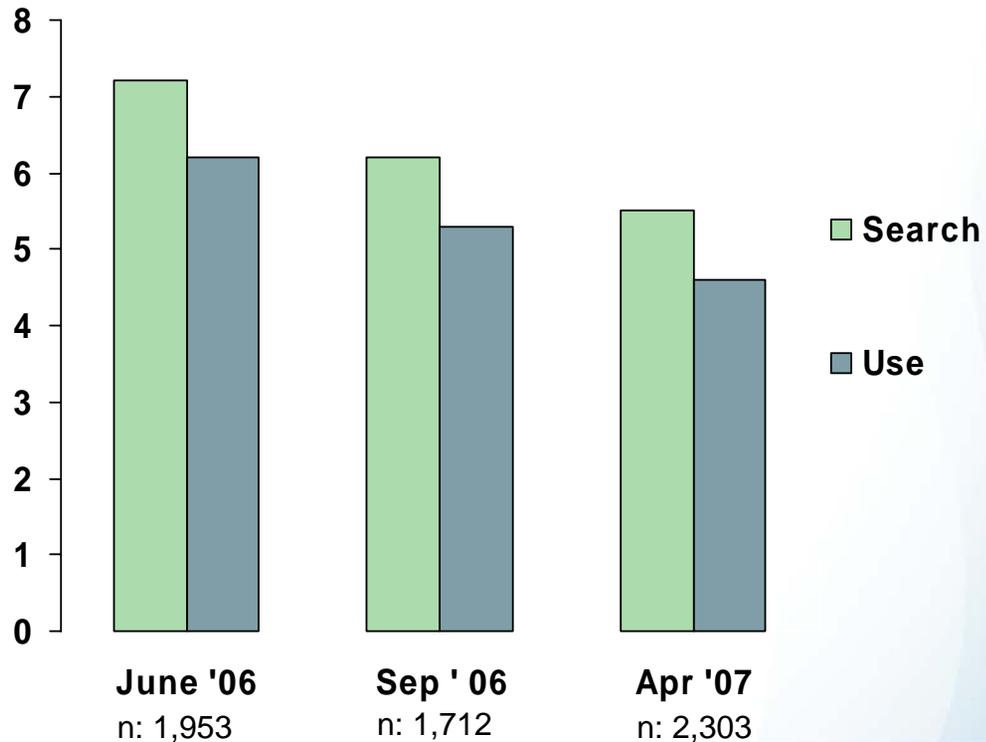
- **“Integration” still evolving**
- **Work left in Stage 3 – Web Search**
- **Friction still a concern**
- **How does this translate?**
  - Search providers focus on features (a.k.a. products)
  - Creators need to ready content

# The Search Landscape

The market

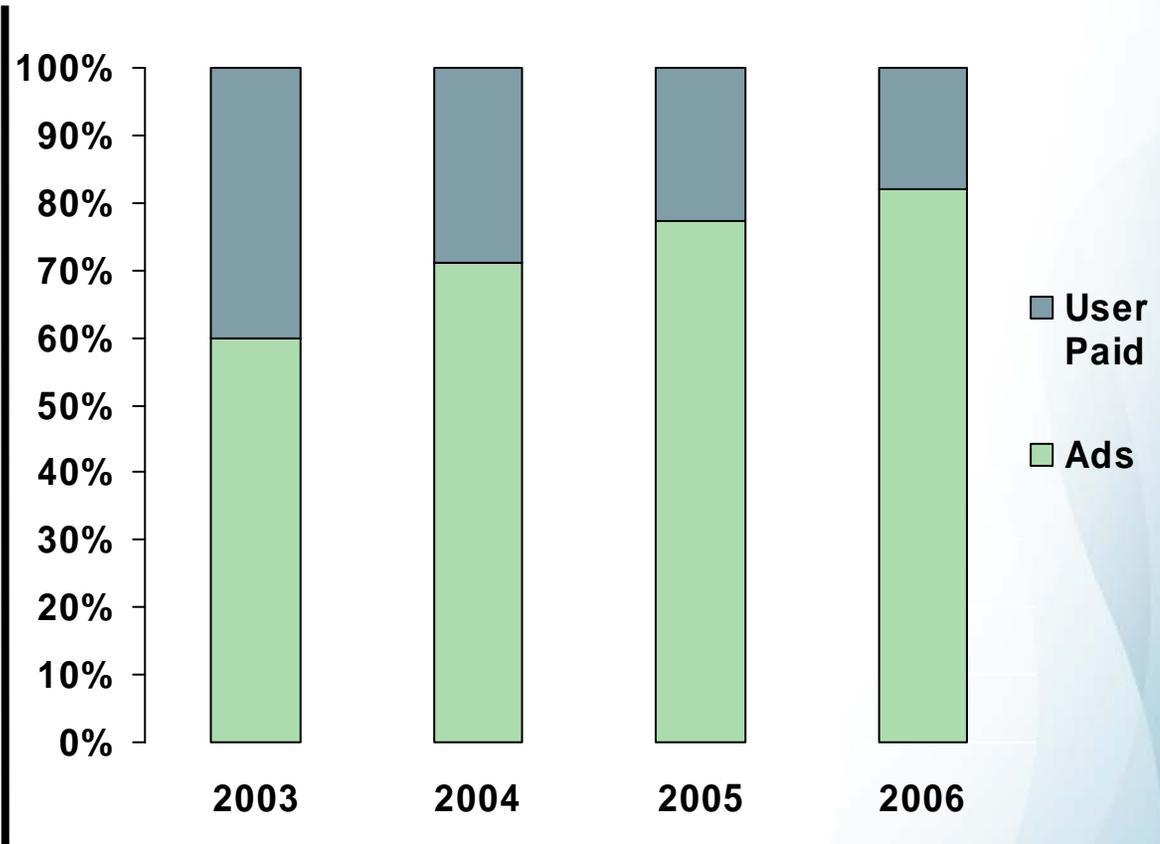
# Knowledge Workers' Weekly Hours Searching & Using External Information

- Time spent searching is declining
- Usage tracks it down as well



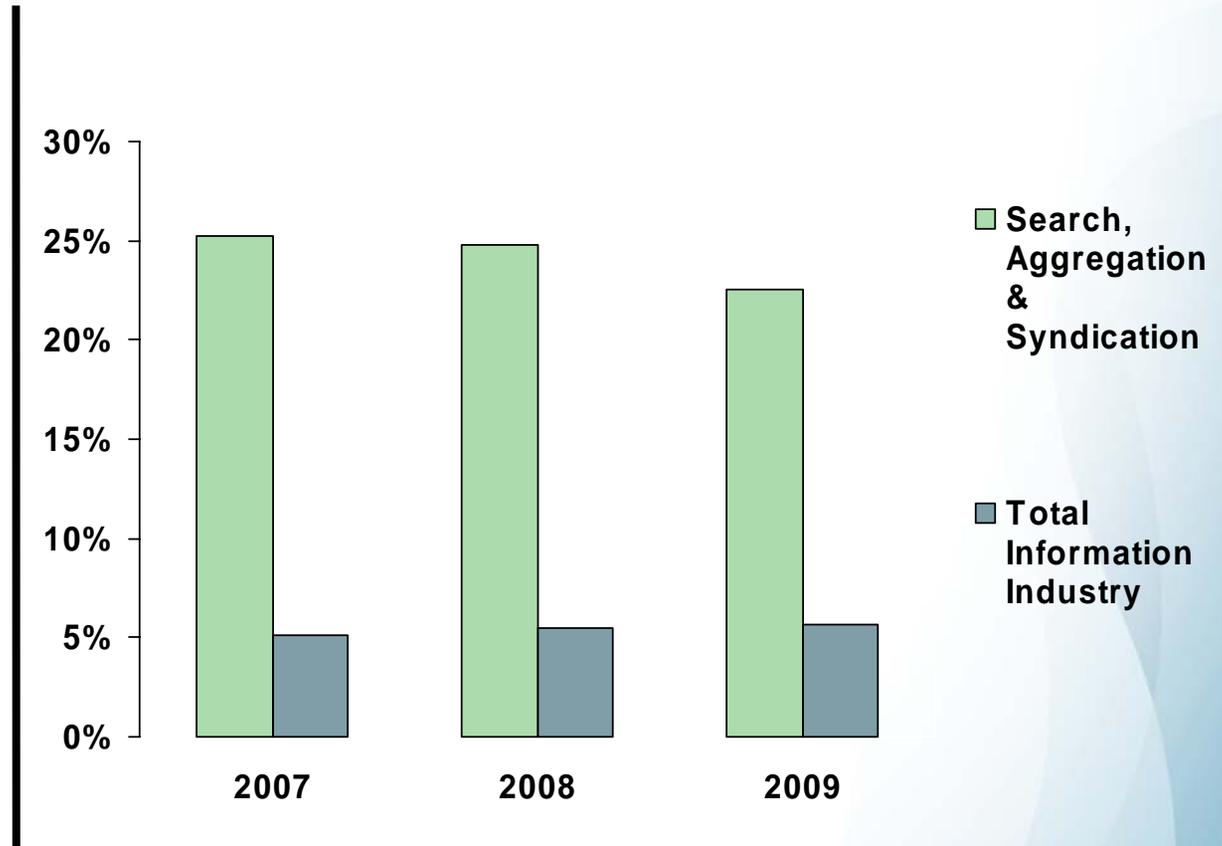
# Search, Aggregation & Syndication Revenue Mix

- Advertising increasingly dominates search
- 'User Paid' holds ground in dollar terms



# Est. Worldwide Search, Aggregation & Syndication Growth vs. Total Industry

- Search continues to outpace industry
- Migration of advertising online fuels growth

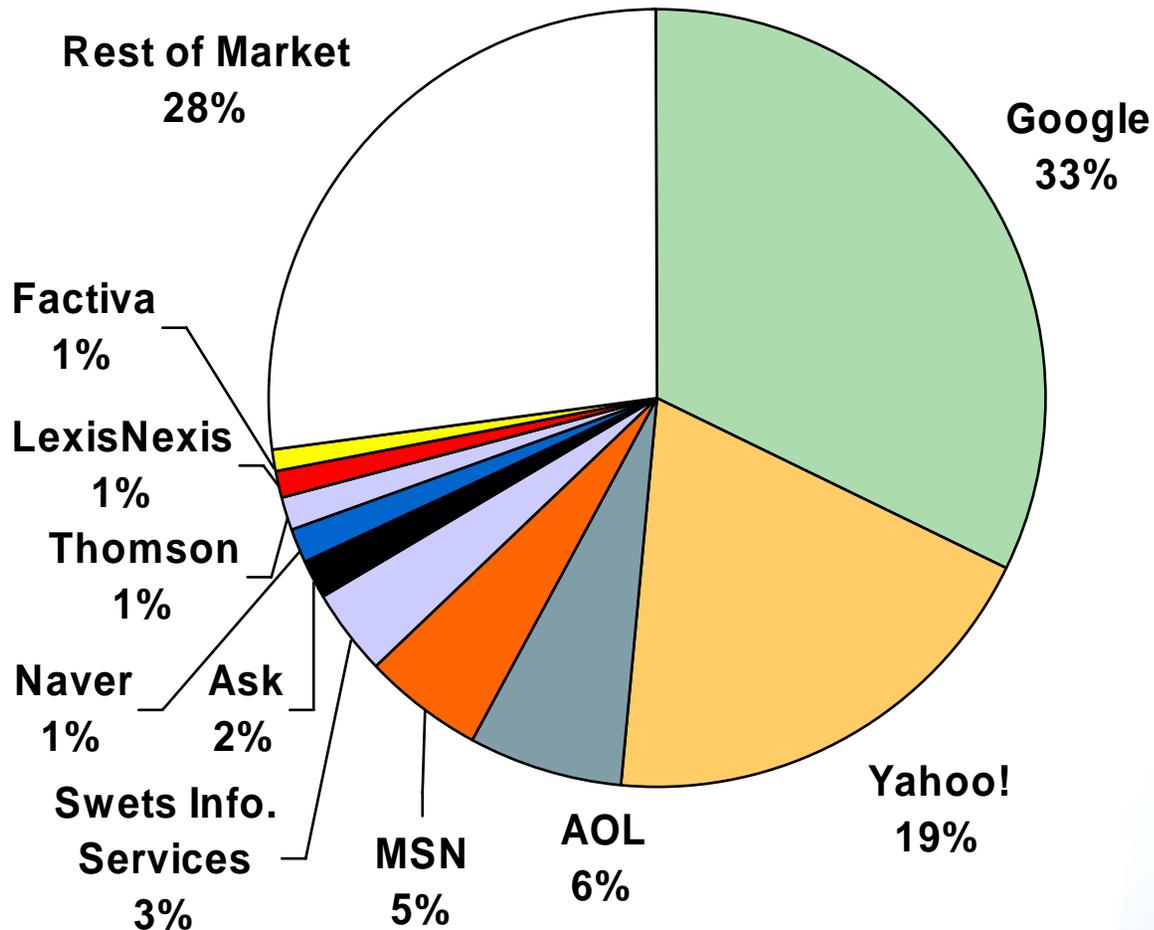


# The Search Landscape

## The players

# The Players – The Top 10

2006 Relative Share of \$33 Billion SAS Market



# The Players – A Few Others...

## Wikipedia's list:

- Open source
- Metasearch
- Regional
- People
- Email-based
- Visual
- Job
- Forum
- Blog
- News
- Multimedia
- Code
- BitTorrent
- Accountancy
- Medical
- Property
- Business
- Comparison shopping
- Geographic
- Social
- Search engines for kids
- Desktop
- Legal
- Usenet
- Defunct search engines

Source: [http://en.wikipedia.org/wiki/List\\_of\\_search\\_engines](http://en.wikipedia.org/wiki/List_of_search_engines)

# The Search Landscape

The trends

# The Trends

- **Relevance**
  - Social
  - Semantic
  - Personal
  - Vertical
  - Local

# The Trends

- **Speed**
  - Caching
  - Prefetching
  - Meta engines
  - More boxes

# The Trends

- **Ease of Use**

- User Interface (UI) enhancements
- Toolbars
- Universal
- App Specific
- Mobile
- Suggested terms

# The Next Environment

**Search &  
Access**



Individual users, consumers, business pros, enterprises

Portals / Sites

## Technologies...

Search \* Blogging \* Wikis \* RSS \* Widgets

Ruby \* SOAP \* XML \* Personalization

Mobile \* Ajax \* CSS \* SaaS \* Ontologies

## Manifest themselves as...

Social Networks \* Mashups \* User-Generated Content

Community/Sharing \* Professional Networking

Expert Network \* Crowdsourcing

# Three Key Take Aways

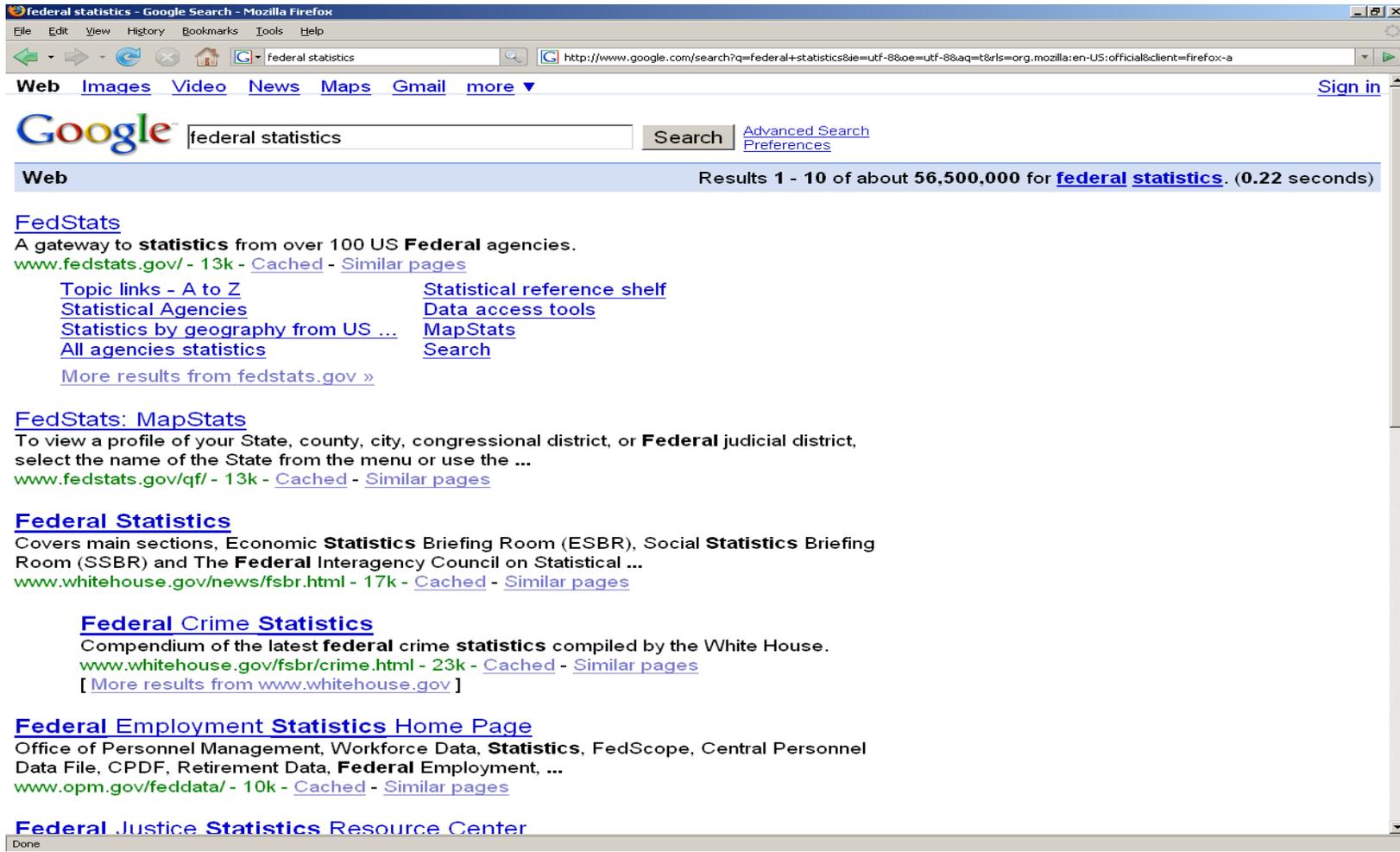
# Key Take Away #1

- **Tomorrow belongs to networks**
  - No guarantee existing players will win
  - Keep an open mind
  - What's old is new again – banner ads?
  - Content must be readied

# Key Take Away #2

- **Today belongs to major search engines**
  - Features (products) left to unfold
  - Room to play - niches not well served
    - Google: “We want to solve big problems for lots of folks”

# Why Google Needs You



The screenshot shows a Mozilla Firefox browser window with the address bar containing the URL: <http://www.google.com/search?q=federal+statistics&ie=utf-8&oe=utf-8&aq=t&rls=org.mozilla:en-US:official&client=firefox-a>. The search bar contains the text "federal statistics". The search results page shows "Results 1 - 10 of about 56,500,000 for federal statistics. (0.22 seconds)".

**Web** [Images](#) [Video](#) [News](#) [Maps](#) [Gmail](#) [more](#) [Sign in](#)

**Google** federal statistics  [Advanced Search](#) [Preferences](#)

**Web** Results 1 - 10 of about 56,500,000 for **federal statistics**. (0.22 seconds)

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Compendium of the latest **federal** crime **statistics** compiled by the White House.  
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**Federal Justice Statistics Resource Center**

Done

# Key Take Away #3

- **Opportunities across all models – new and old**
  - Recognize influence of latest trends
    - e.g. Wrap UGC and interaction into existing aggregation tools
  - Choose the right model for you

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