



iab
SEMINAR





Global trends and the Yahoo! Search Alliance

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Agenda

Insight: **Search - Marketers and Users Trends**

Vision: **Consumer Search Innovation and
the Yahoo! and Microsoft Search Alliance**

WHO **WANTS** WHAT



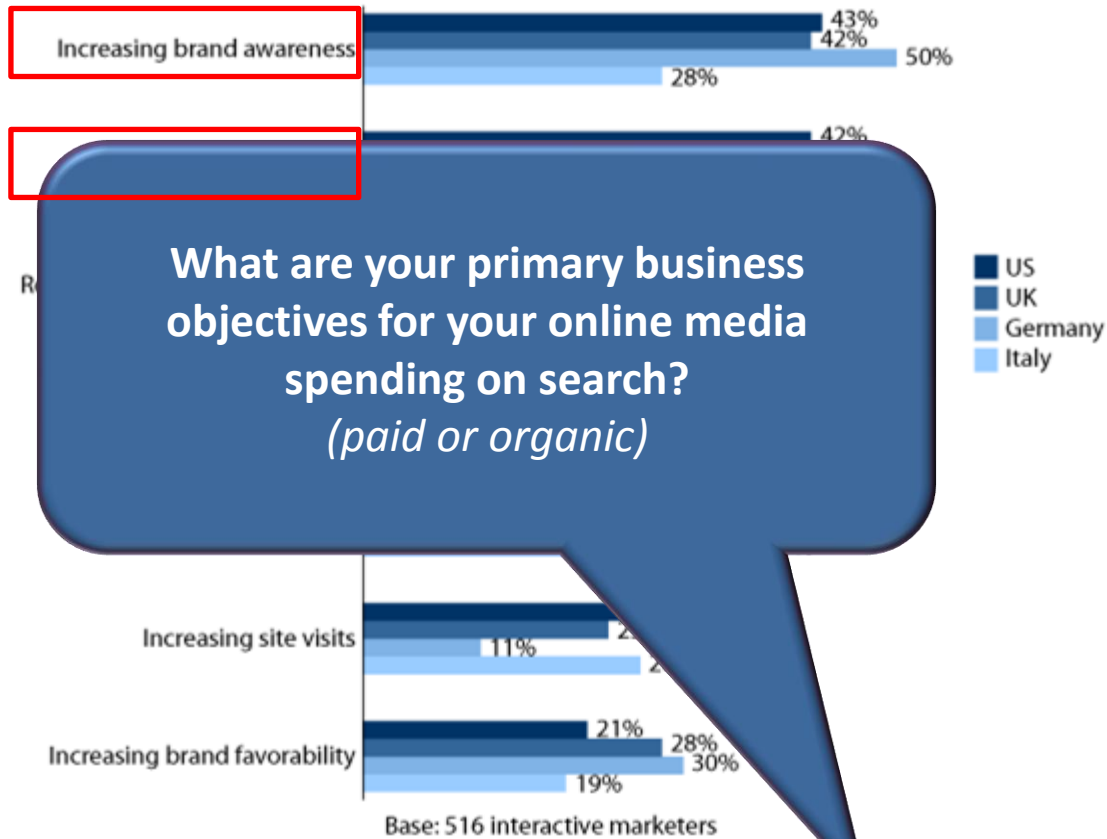
What **you** want

What **search users** want

WHO WANTS WHAT

Search Marketers

Search Users



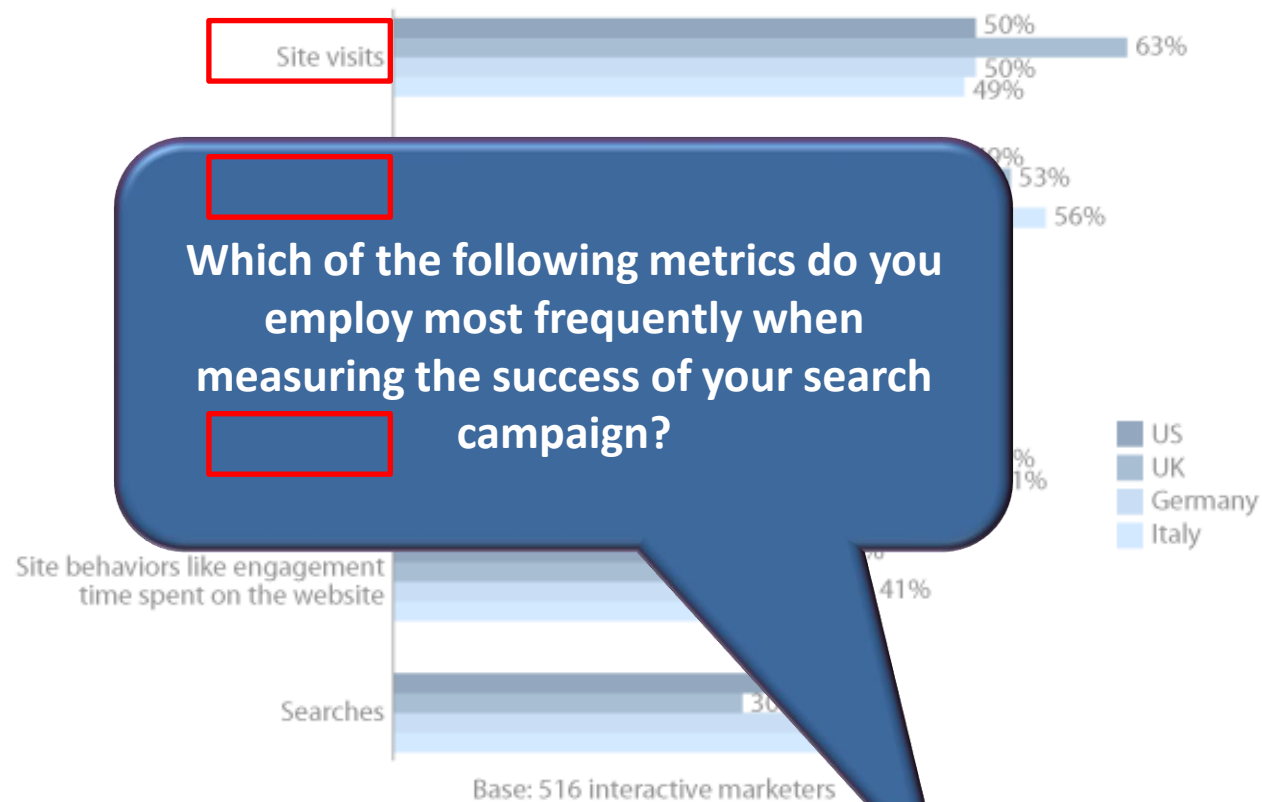
Source: December 2010 Interactive Marketing Online Executive Panel Survey

58878

Source: Forrester Research, Inc.

WHO WANTS WHAT

Search Marketers



Source: December 2010 Interactive Marketing Online Executive Panel Survey

58878

Source: Forrester Research, Inc.

WHO WANTS **WHAT**

Search Marketers

BRANDING MATTERS FOR SEARCH **MARKETERS**

SEARCH IS POWERFUL FOR BRAND **AWARENESS**

SPENDING CONTINUES DESPITE POOR MEASUREMENT **METRICS**

WHO WANTS WHAT

Search Marketers

OUR VISION

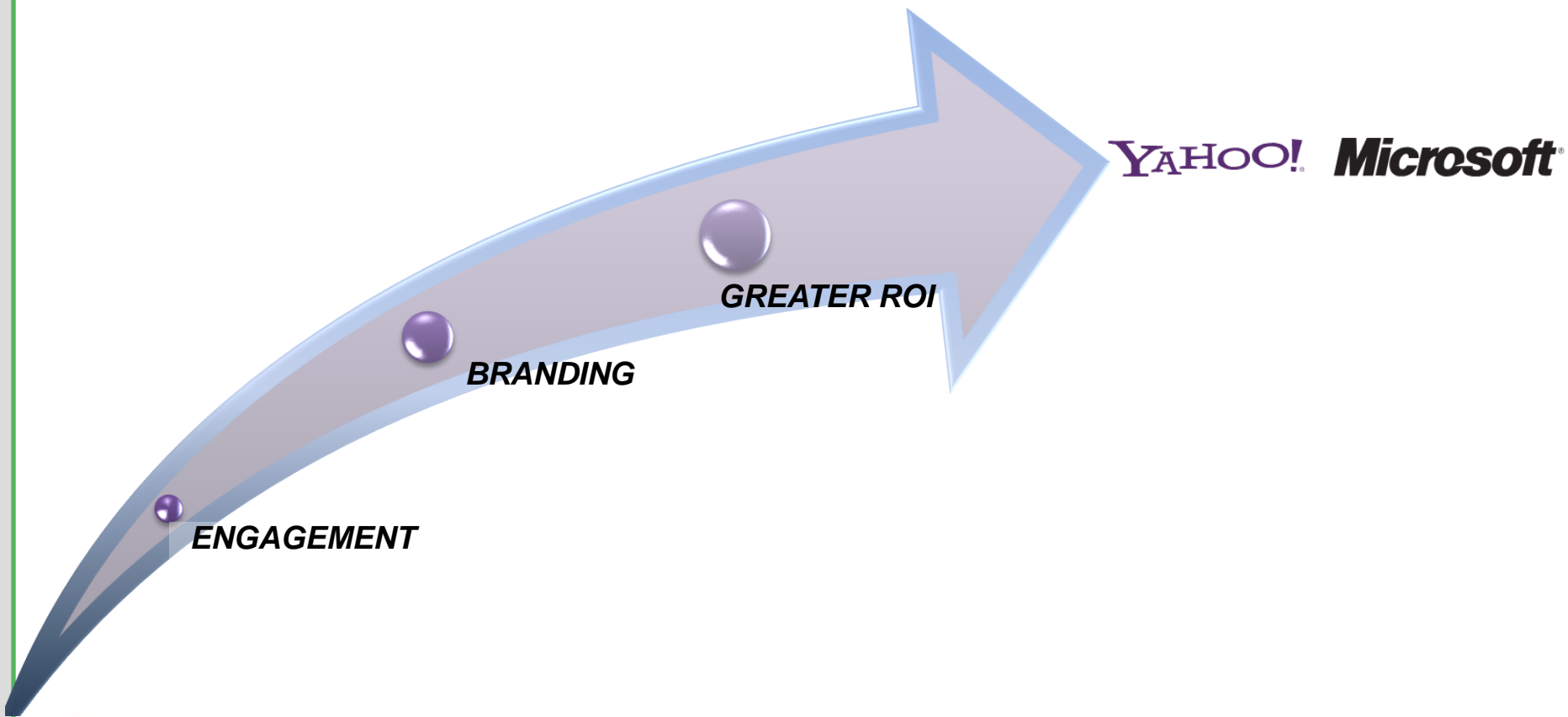
GREATER ROI

BRANDING

ENGAGEMENT

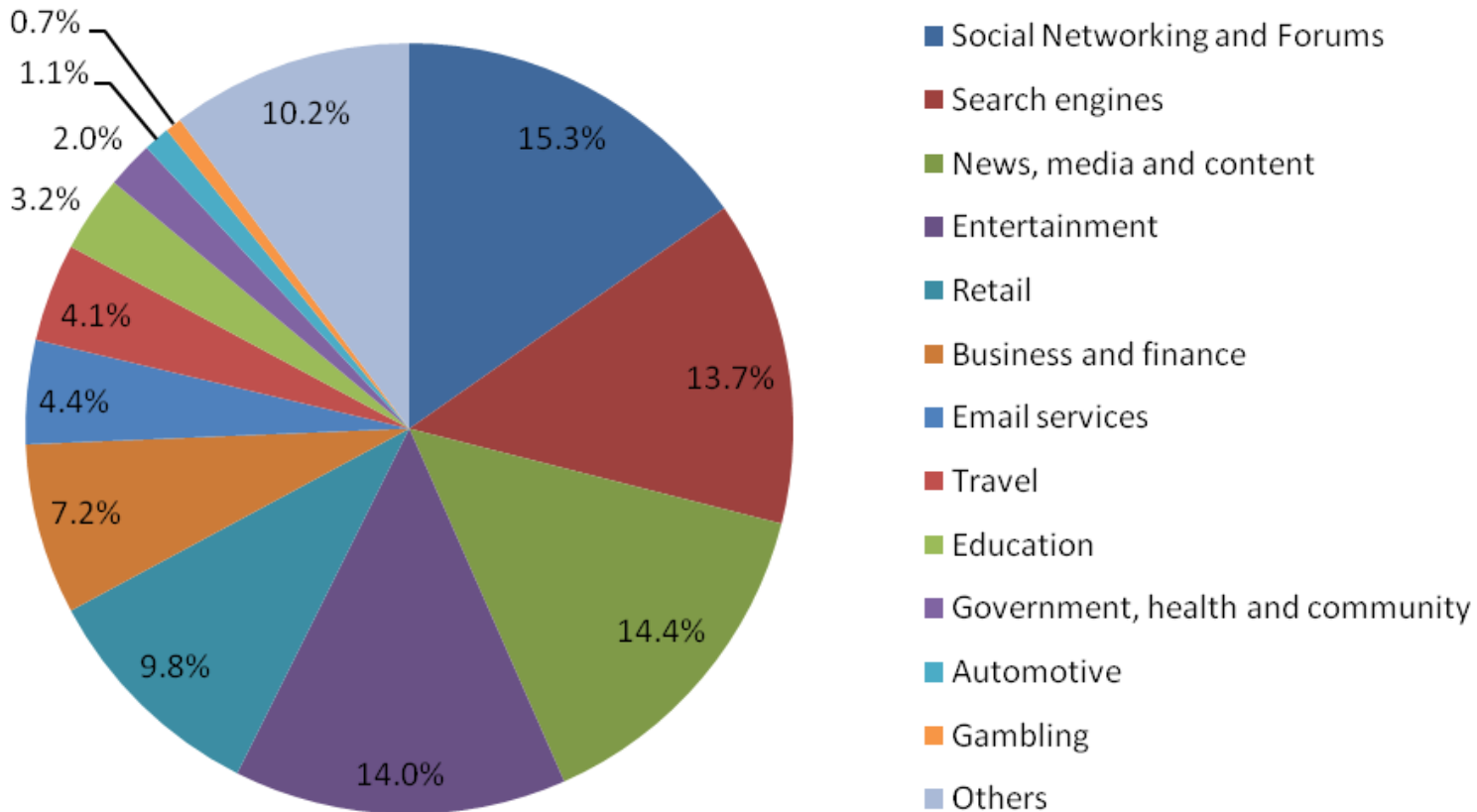
WHO WANTS WHAT

Search Marketers



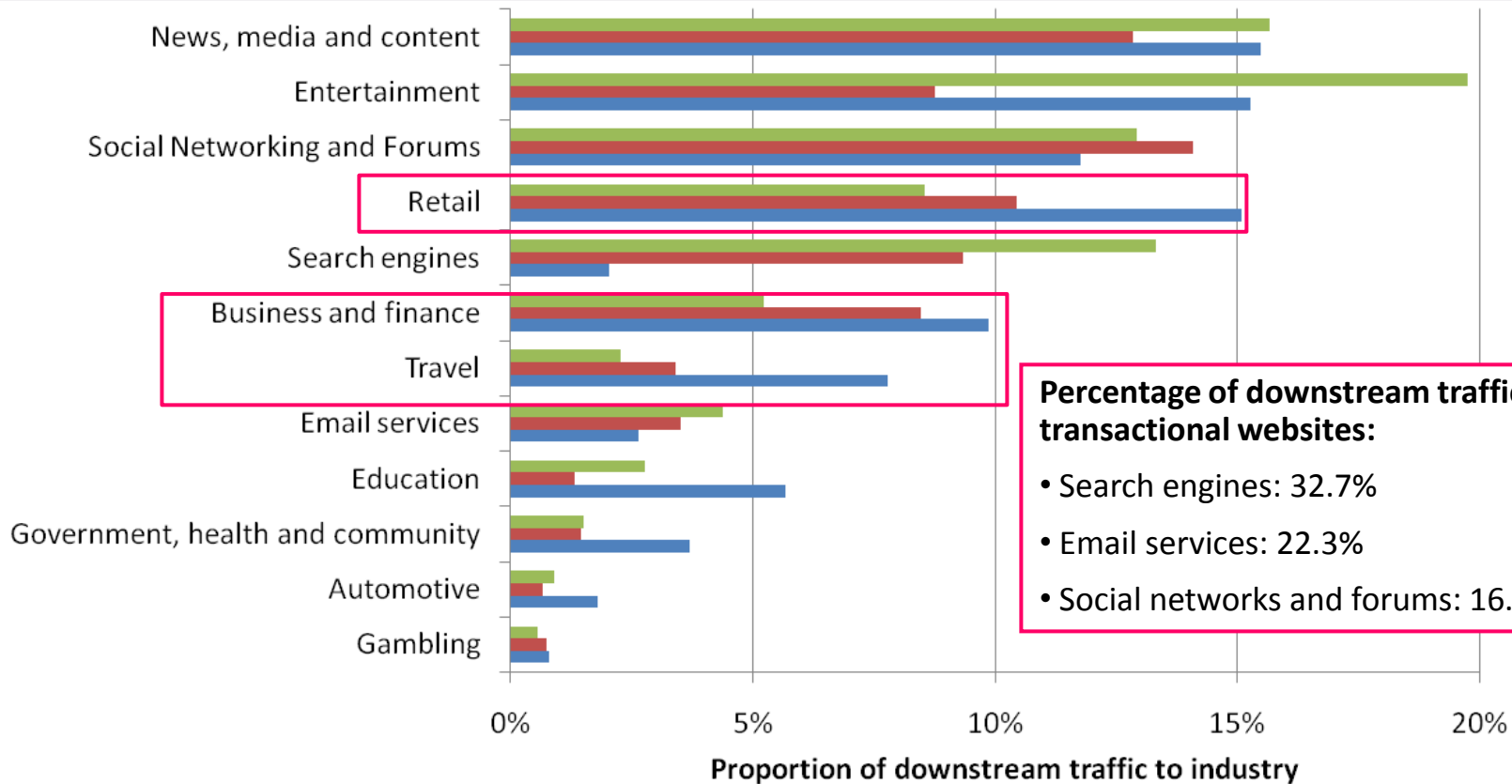
WHAT DO USERS DO ONLINE? (UK)

Search Users



WHERE SEARCH ENGINES SEND THEIR USERS?

Search Users



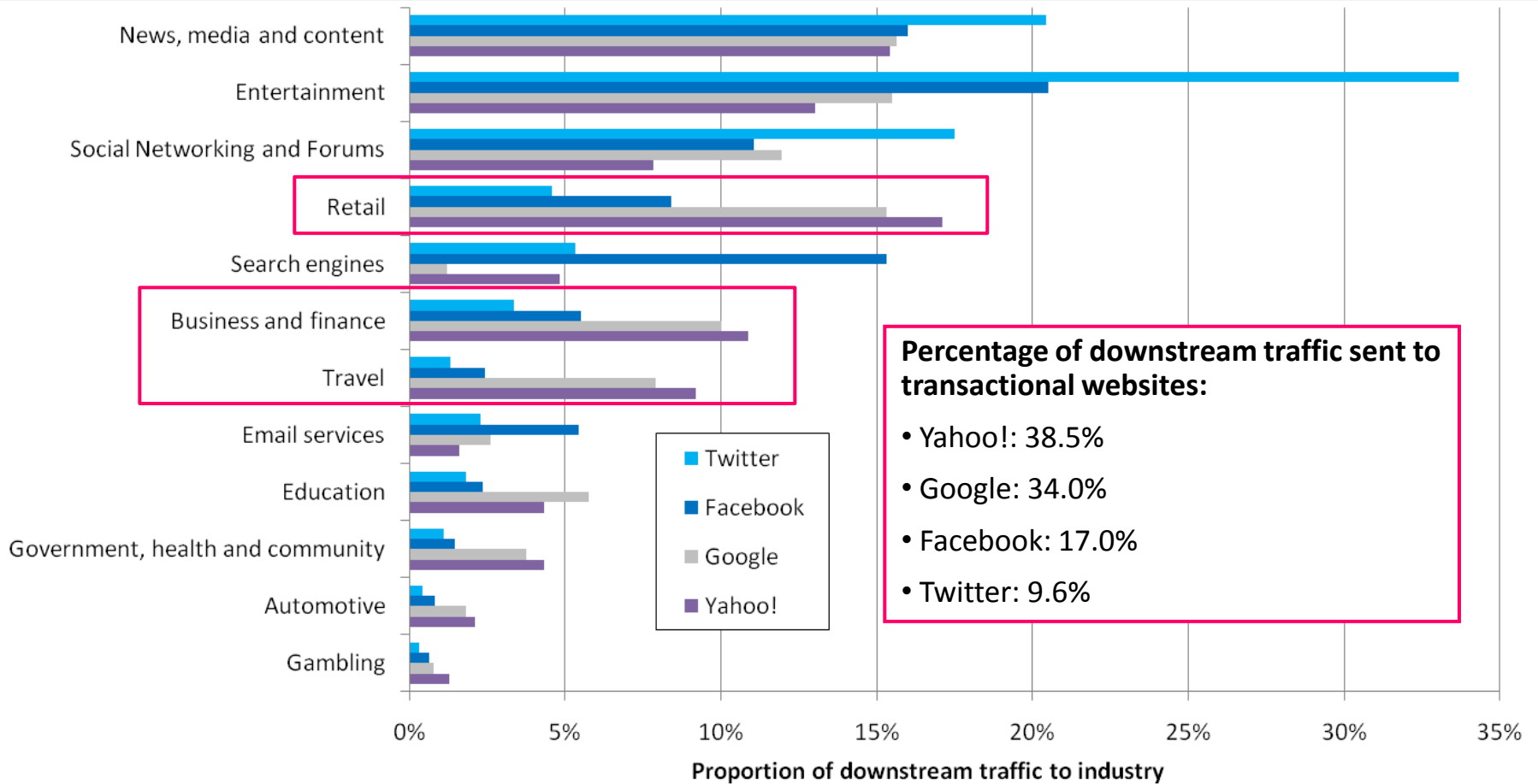
Percentage of downstream traffic sent to transactional websites:

- Search engines: 32.7%
- Email services: 22.3%
- Social networks and forums: 16.0%



WHERE YAHOO! SENDS ITS USERS?

Search Users



HOW DO USERS SEARCH WITHOUT SEARCH?

Search Users

How do you remember useful or interesting websites you have visited?

61%

Bookmark on the web browser

39%

Search again for useful sites they know of

29%

Let their browser toolbar remember sites

7%

E-mail links to themselves

7%

Copy/paste into Word doc on PC

7%

Write down the URL on paper

→ THERE ARE ALTERNATIVES TO SEARCH!

WHO WANTS WHAT

Search Users

OUR VISION

*DIFFERENTIATED
NEEDS*

*MORE
ANSWERS*

*MORE THAN
SEARCH*

Agenda

Insight: **Search - Marketers and Users Trends**

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CONTINUOUS INNOVATION

Delivering Answers, Not Links.

Today's Search Experience

Query



Search Results Page

Tomorrow's Search Experience

Query



Personal Context:

- Search and Behavioral History
- Social
- Location



- Discovery & Entertainment
- Make Smarter Choices
- Find the Best Answers
- Get Things Done
- Wherever the user goes

RECENT INNOVATIONS

Intelligent Shortcuts

The screenshot shows a Yahoo! search results page for the query "lady gaga". At the top, the Yahoo! logo is on the left, and navigation links for "Web", "Images", "Video", "Local", "Shopping", "News", and "More" are in the center. A search bar contains "lady gaga" and a yellow "Search" button is to its right. Below the search bar, a horizontal bar lists "Latest On:" with names: "Carrie Underw...", "Jewel Kilcher", "Chely Wright", and "Jennifer Huds...".

The main content area features a purple vertical sidebar on the left labeled "Overview". The main article is titled "Lady Gaga Brags, U2 Rivals R.e.m., Strokes For ..." from Bloomberg, dated Jan 11 04:12pm. It includes a small image of Lady Gaga and text stating she "immodestly predicts her next CD will be 'the greatest album of the decade.'" Below the article is a "Lady Gaga Photos" section with five small image thumbnails and a "More Photos" link.

On the right side of the main content area, there are three vertical tabs labeled "Events", "Videos", and "Twitter".

Below the main article, there are two links: "Lady Gaga : Official Site" (described as "The Official Web Site for Lady Gaga") and "Lady Gaga - Wikipedia, the free encyclopedia" (with sub-links for "Life and...", "Musical style...", "Public image", and "Discography").

At the bottom left of the main content area, there is a small image of Lady Gaga and the text "Lady Gaga is an American recording artist. She began performing".

On the far left, a sidebar contains "QuickApps", "Search Pad", "SafeSearch - On", and "893,000 results for lady gaga". Under "Related Albums", there are four album covers: "Poker Face", "Beautiful, Dirt...", "Just Dance", and "The Fame".

RECENT INNOVATIONS

Search Direct (Beta)

- **Simpler way to find answers fast**
- **Real-time trending queries**
- **Right-panel** provides a significant amount of content to link directly to sites
- Extensible to **mobile platforms**

Web Images Video Local Shopping News More

ATPG Search

atpg
atpg stock
atpg oil and gas
atpg message board
atpg test
atpg quote
atpg news
atpg textile products
atpg yahoo finance
msn money atpg

ATPG - Atp Oil & Gas Corporation
↑ **18.44** +.87 (+0.76%) at 12:59 PST Mar 23

Open:	18.20	Low: 18.20	High: 18.94
Prev Close:	17.14		
Mkt cap:	937.56M		
Vol/Avg:	2,122,230		
Day:	18.32 - 18.95		
52wk:	8.16 - 23.97		

Go to Yahoo! Finance

Quote delay: 15 min - Nasdaq, 20 min - NYSE/Amex

YAHOO! FINANCE

Web Images Video Local Shopping More

special k Search Options

Also try: [special k diet](#), [special k challenge](#), [special k cereal](#), [More...](#)

Kellogg's @ Special K
[Special K Products](#) | [Take the Challenge](#) | [Success Stories](#)
Try New **Special K** Protein Shakes. Made with 10g Protein & 5g Fiber.
[www.SpecialK.com](#)

PROMOTIONAL RESULTS

Close Video

0:14 / 0:32

Advertiser Benefits

- **More searches** means **more traffic**
- **More engaging ads formats**

THE YAHOO! AND MICROSOFT SEARCH ALLIANCE

The deal explained

- ✓ A global initiative and a 10 year commitment
- ✓ More value and efficiency
- ✓ Scale to speed innovation
- ✓ A better search experience for consumers
- ✓ Better results for advertisers

Worldwide transition expected to complete by early 2012



Why join forces

Competition

Create a competitive new choice in search

Efficiency

Simplify your search advertising

Customer service

Provide a better search experience for the consumers

Innovation

Faster innovation through scale

Performance

Improve your ROI

CONNECT YOUR BRAND

with searchers more likely to buy

The unique searchers on Yahoo! and Microsoft sites are

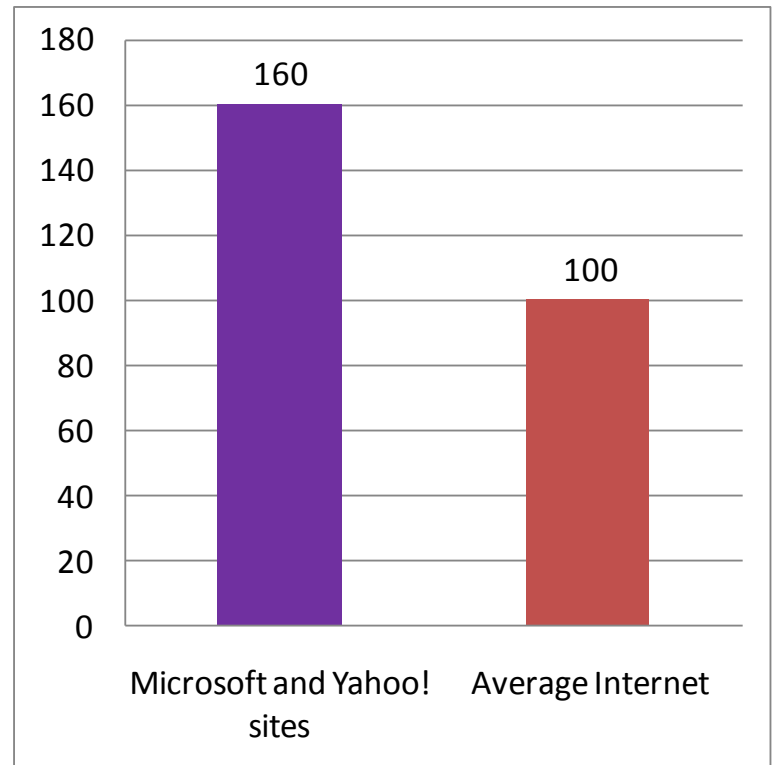
60% more likely

to make purchases online than the average searcher.

Worldwide numbers shown.

Source: comScore qSearch (custom), January 2011

Audience buying power index



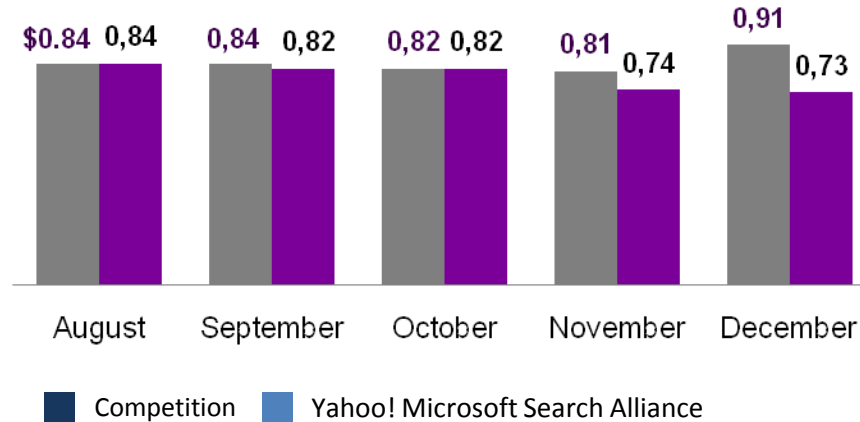
“Our findings indicate that the Search Alliance is clearly and unequivocally becoming a more attractive channel for paid-search marketers.”

“The Search Alliance has resulted in improved traffic quality for advertisers, as evidenced by higher conversion rates.”

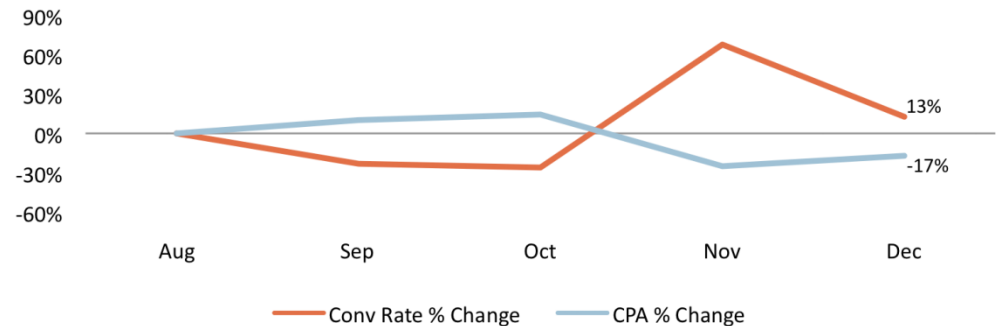
“Yahoo!-Bing’s CPC consistently outperformed Google since the introduction of the alliance, and ended the year with a 20% advantage.”

Marin Software Research

Cost per click



Yahoo!-Bing (adjusted) CPA & Conv Rate Change with respect to competition



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Yahoo! Search Experience

The screenshot shows the Yahoo! Italia search results for the query "firenze". The page layout includes a top navigation bar with links like "Web", "Immagini", "Video", "Pagine Gialle", "Shopping", "Notizie", and "Altro". The search bar contains the text "firenze". Below the search bar, there are several sections: "Gli utenti cercano anche:" with links to "comune di firenze" and "hotel firenze"; "mappe firenze" with a link to "Maps.Ovi.com"; "B&B a 10 min dal centro di Firenze" with a link to "www.bedandcar.travel"; "400 Hotel a Firenze" with a link to "www.booking.com/firenze"; "Firenze - Guida viaggi" with a link to "viaggi.yahoo.it"; "Comune di Firenze" with a link to "www.comune.firenze.it"; and "Firenze - Wikipedia" with a link to "it.wikipedia.org/wiki/Firenze". There are also several advertisements, including "Promozione: Hotel a Firenze da €20" and "Hotel Firenze 2011". On the left side, there are site filters for "Mostra tutti", "Comune di Firenze", "Wikipedia", and "Booking.com". At the bottom left, there is a "Fotogallery" section. The page is annotated with several purple and blue callouts: "Search box" points to the search bar; "Search Ads" points to the advertisement for Hotel Firenze; "Applications" points to the left sidebar; "Site filters" points to the filter buttons; "web of things" points to the "Firenze - Guida viaggi" section; "Algo results" points to the "Comune di Firenze" result; and "Rich results" points to a small image thumbnail in the bottom right.

Applications

Search box

Search Ads

Site filters

web of things

Algo results

Rich results

IN CLOSING

INNOVATION



COLLABORATION



FEEDBACK



QUESTIONS?



THANK YOU

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kyer

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YAHOO!

