

# State of the Search

March 19, 2007

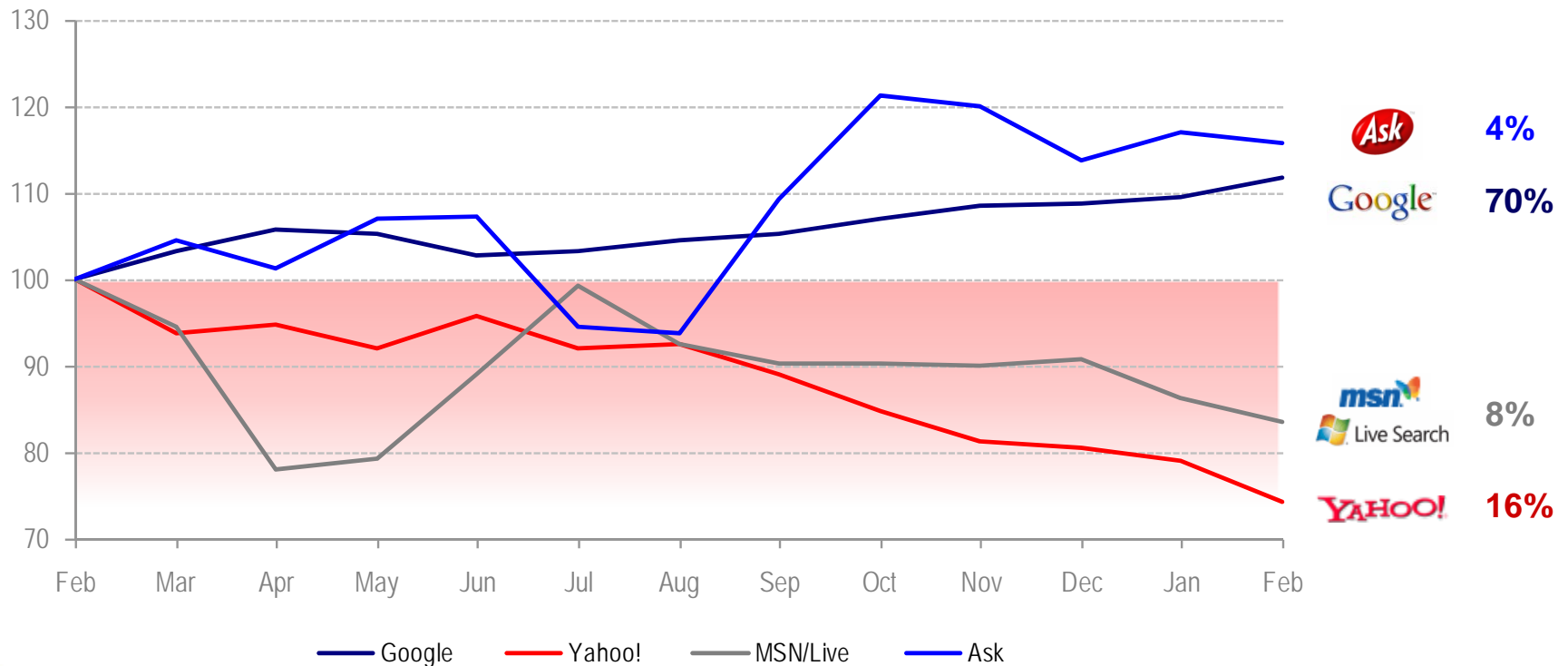
Market Share, Search Fulfillment, Blended Search, and More ...




# Still chasing Google

- 7 out of 10 web search queries performed in US are on Google
- Ask is the only other engine with year-over-year market share gains

US Web Search Market Share Trends  
(Top Four Search Engine Market Shares indexed to February 2007 levels)

February 2008  
Market Share

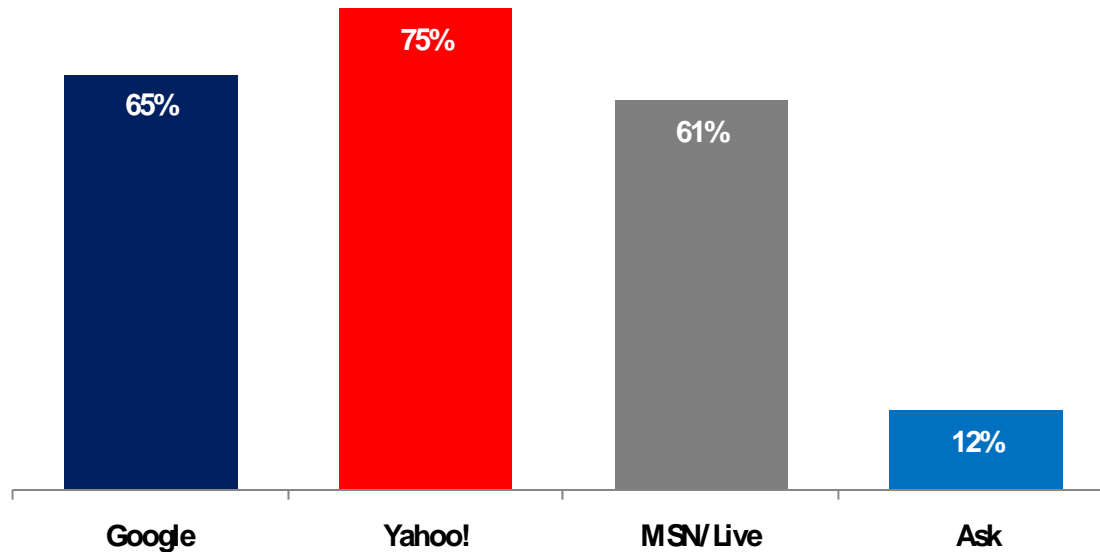


 **4%**  
 **70%**  
 **8%**  
 **16%**

# What about that second click though?

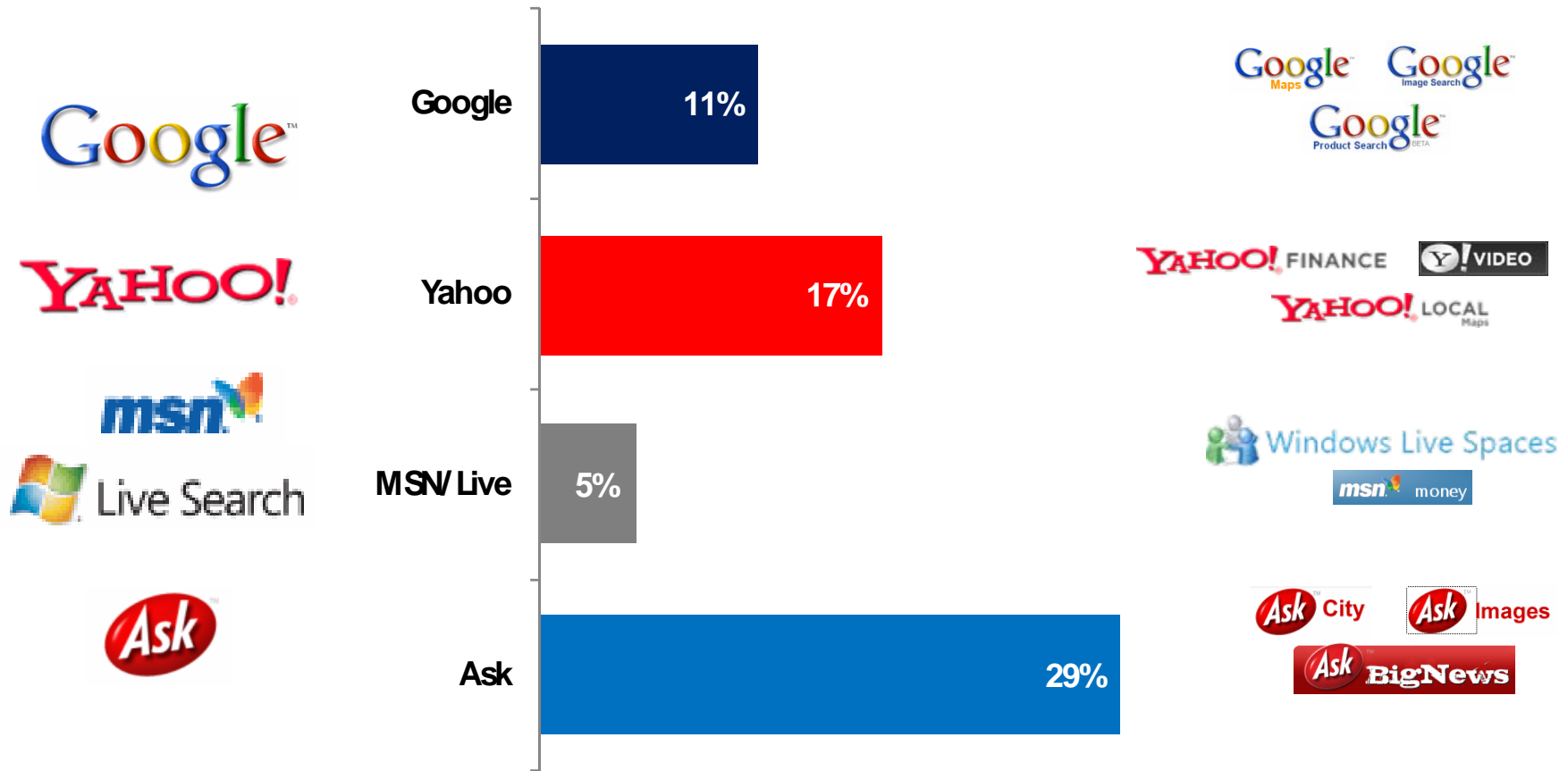
- Yahoo! searches result in a search referral to another website more often than the other major engines
- Ask searches are the least likely to result in a referral

Average Search Fulfillment  
(Percentage of web search queries that result in a referral, 52 week average)



# Keeping them in the family

Queries Resulting in Internal Referrals  
(Percentage of web search queries that result in a referral to another page on the search property domain, February 2008)



# The slow death of the 10 blue links

**Ask.com** search results for "bishop allen". The results include a definition of the band, a Wikipedia link, and information about Bishop Allen Academy. The interface shows a search bar, navigation tabs (Web, Images, Maps, News, Shopping, More), and a sidebar with "Narrow Your Search" and "Expand Your Search" options.

**YAHOO!** search results for "new york restaurants". The results are categorized into "Restaurants near New York, NY - Local Results" and "Restaurants near New York, NY - Other Results". The local results include categories like American, Italian, and Japanese, along with a list of nearby restaurants like "Madison" and "Presidential Pizza".

**Live Search** results for "sage catalunga pictures". The results show a grid of images related to the search query. The interface includes a search bar, navigation tabs (Web, Images, Maps, News, Shopping, More), and a sidebar with "Related Searches" and "Picture of the Week".

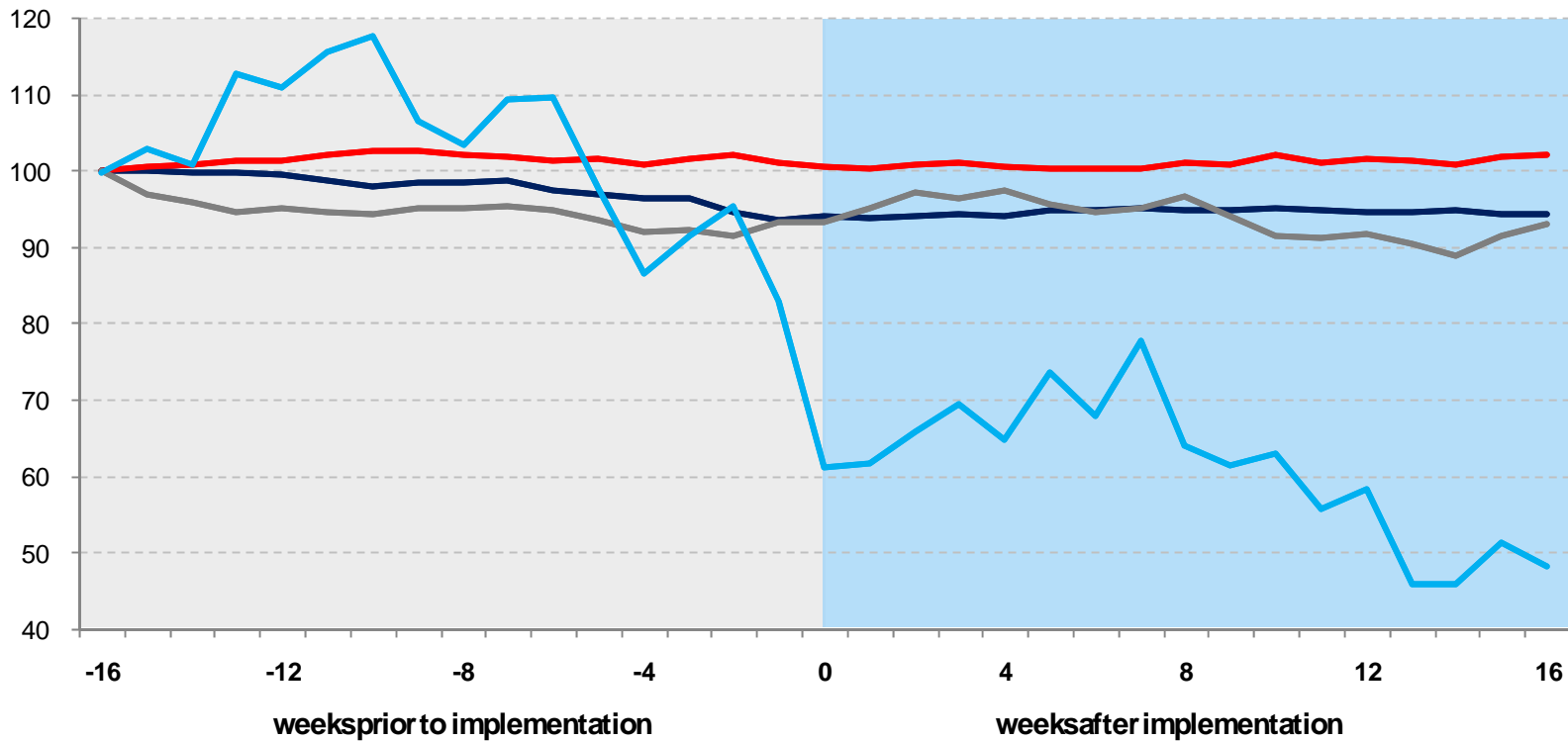
Google Universal Search - May 17  
Ask 3D Search - June 5  
WL Blended Search - September 27  
The New Yahoo! Search - October 2

# Ask 3D made the biggest impact

- The rollout of blended search has yet to have a major impact on the top 3 engines but the story is different for #4

## Blended Search Impact on Search Fulfillment Trends

(Indexed measure of weekly search fulfillment before and after implementation of blended search)

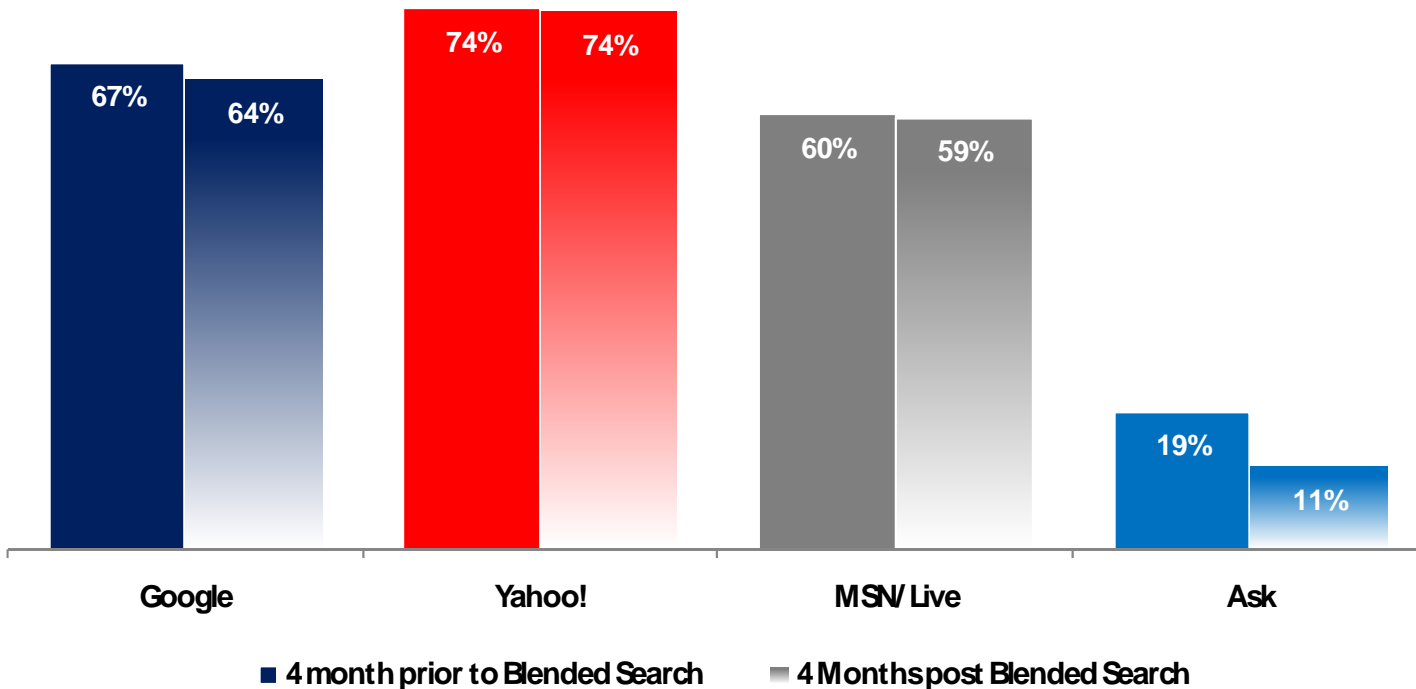


— Google — Yahoo! — MSN Live — Ask

# Google and Ask see changes from the blend

- Comparing the period prior to Ask 3D and the period after there was an 8ppt decline in fulfillment rates
- Google saw a decline of about 3ppts

Average Search Fulfillment Rates for Prior and Post Blended Search Rollout  
(Percentage of web search queries that result in a referral, 4 months prior and 4 months post)

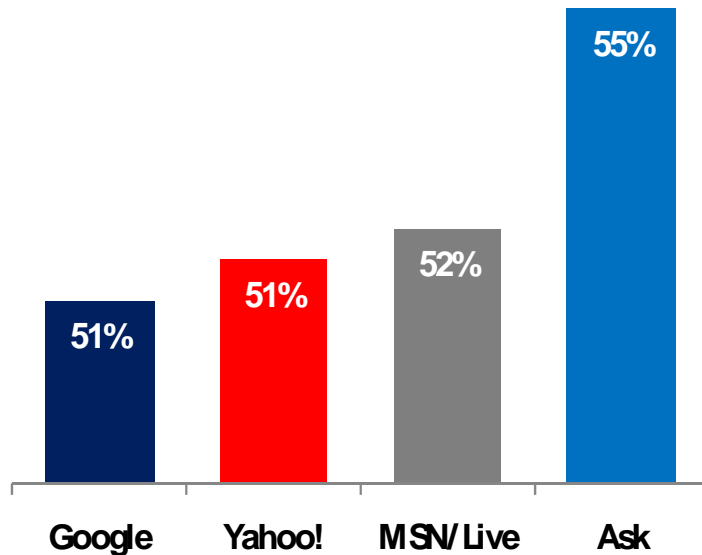


# Ask is all about the ladies, or ... maybe not

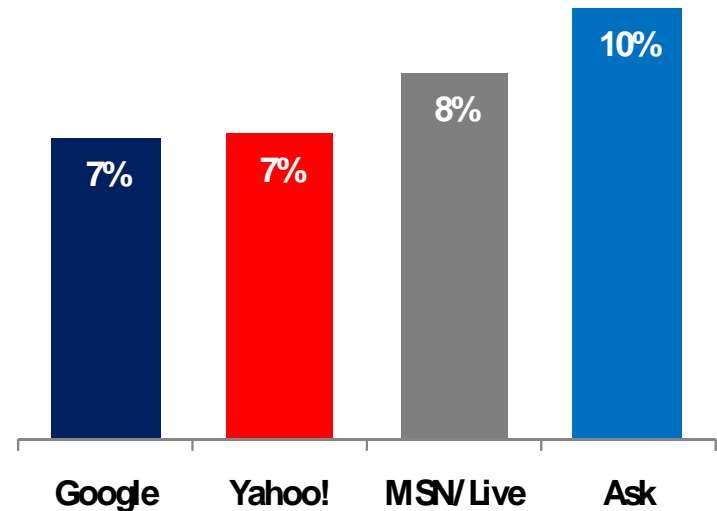
- Among major search engine properties, Ask has the highest concentration of women and Family Oriented users



Female Composition Mix  
(% of engine users that are women, Feb. 2008)

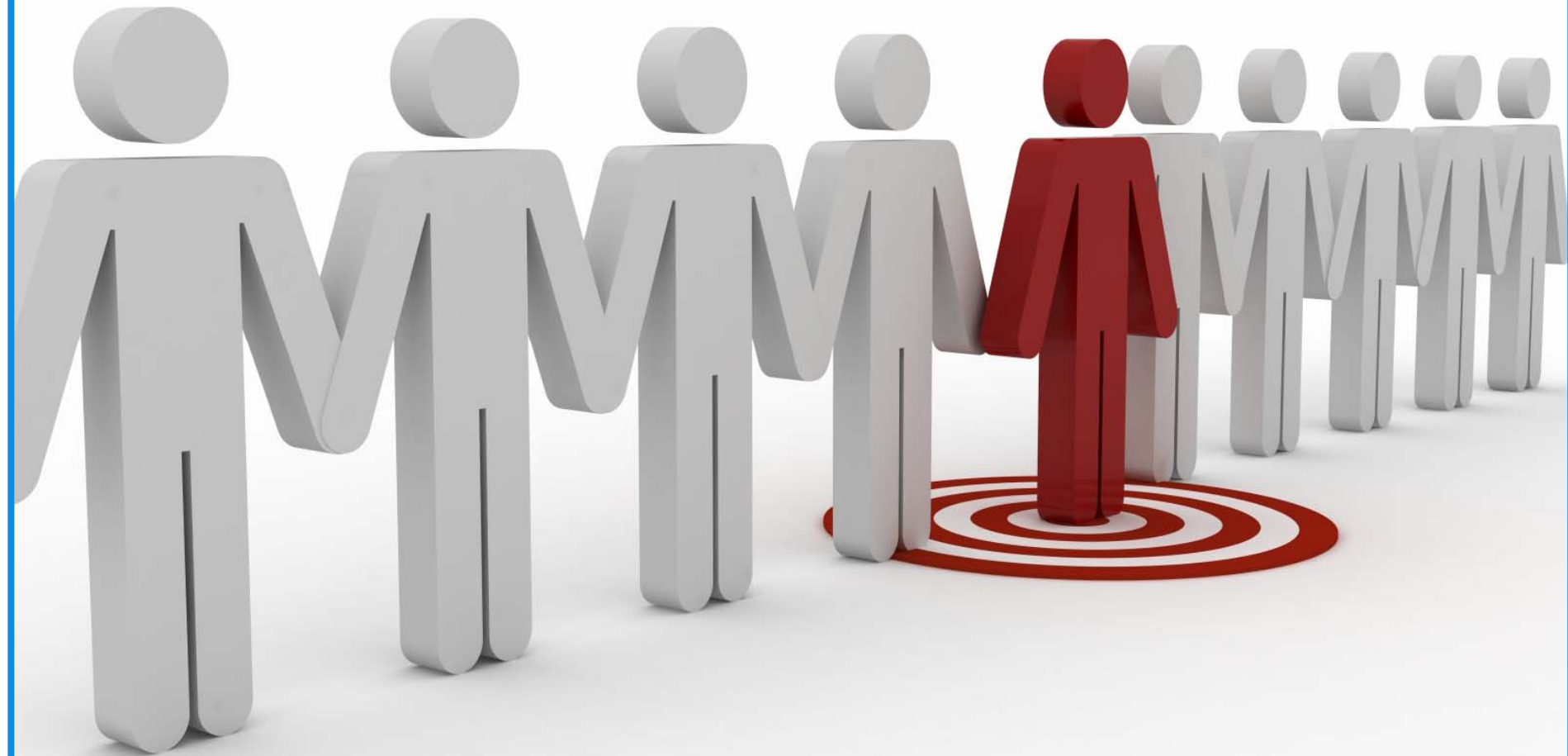


Family Oriented Composition Mix  
(% of engine users that are Family Oriented, Feb. 2008)





# Parting Words ... Segment Your Search



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