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Yahoo!'s Long Strange Journey

Microsoft wanted to buy Yahoo! last year, a fact widely reported in both the business and general press. Yahoo! rebuffed the Redmond giant. A change in the economy and Yahoo! leadership made for a very different deal announced at the end of July 2009. If that deal gets regulatory and other approvals, Yahoo! will stop maintaining its own search engine database and will use Microsoft's Bing, at least for web, image, and video search. Business analysts looked at the deal and analyzed it for the financial implications. The question for searchers is whether or not to continue to use Yahoo!, and if so, for how long and for what types of searches. The answer depends, in part, on how the future Yahoo! will appear.

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GHOST OF YAHOO! PAST

Back when the web was young, in those early, heady days when anyone with internet access could make a simple webpage and new services sprouted unusual names, a couple of Stanford graduate students (no, not those two, they come much later in the web's story) decided to collect a bunch of interesting links. In a very librarianesque manner, as the list got too lengthy to manage, they decided to categorize it. Thus "Jerry and David's Guide to the World Wide Web" became instead "Yet Another Hierarchical Officious Oracle," or Yahoo! for short.

Yahoo! became an extremely popular starting point in the early days of the web. It offered a subject approach to the rapidly growing number of content sites. Yet it was not originally a search engine, not a tool that searched through the content of webpages. That came later, as did its change into a portal. Instead, the original Yahoo! was a directory—a hierarchically categorized listing of websites and pages with a brief description of each entry.

Yahoo! cataloged the web, or at least that portion of the web that it found interesting. Only later did it add what has come to be called a search engine. At first it worked with partners: Open Text, AltaVista, Inktomi, and Google. Each of these companies, in turn, provided follow-up search results after the directory matches. The search engines looked for words in the complete text of the page rather than just in the category names, titles, and brief descriptions in the Yahoo! directory. As the web grew, the directory approach became unsustainable, and Yahoo! moved its focus to becoming a personalized portal to the web. It relied more heavily on its search engine partner.

The directory from which Yahoo! grew was eventually retired from the homepage and excluded from search results (unless you clicked on the "More" drop-

down menu). It became more difficult to find in general. As search increased in importance, Yahoo! started buying other search companies—some of its previous partners (AltaVista and Inktomi) and its competitors (AlltheWeb)—while still relying on Google for its search engine results. From that purchased technology (primarily Inktomi), Yahoo! was finally able to launch its own search engine database in February 2004.

THE PRESENT YAHOO!

Despite the July 2009 announcement, Yahoo! is still running its own, unique search engine database, along with all of its other services. Just because future plans have been announced, all the details have yet to be resolved and accomplished. At the time of the announcement, the two companies said that the search engine changeover from a Yahoo! database to Bing will most likely be in the second half of 2010. Until that time, Yahoo!'s database will continue to be its own, and it will presumably continue to be updated with potential user interface changes. In August 2009, Yahoo! announced it was testing changes in its search experience. In the test, the right-hand margin has search refinement options. Whether the test will be rolled out to all users remains to be seen, but the announcement of the test appears to be an attempt by Yahoo! to show that it will continue to work on improving the search experience.

It also means that, for the present, a Yahoo! search looks in a different database than either Google or Bing. Searchers have three major, competing databases to try and can compare the results. Searchers also have different search features available at each one.

Most significantly at Yahoo!, the link-searching capabilities continue to separate it from Google and Bing. Plain link searches go directly to Yahoo!'s Site Explorer with its feature-rich ability to browse the links between sites. More advanced link searches that might, for example, combine a link search with the exclusion of specific sites remain as regular web search results. In most cases, Yahoo!'s link search returns a far more comprehensive set of results than does Google. And Bing has yet to make link searching available, even though Microsoft's previous search engines offered a fairly robust link search.

In addition, Yahoo!'s Search Assist search suggestion feature tends to be more robust than the other search engines. While that feature seems likely to remain even after the database switch to Bing, it may not work as well with a different database. The enhanced search results that give additional information about results may remain as well. Yahoo! has said the test interface is expanding the number of sites for which enhanced results are available. Take a look in the Options/Preferences/Enhanced Results to see a list of the sites for which the additional line of data under the title is provided. See Wikipedia results for an example.

On the other hand, some Yahoo! annoyances remain as well. By default, no "More from this site" link displays, unless the searcher changes the preference under Display &

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Layout. Then the "More from this site" link displays for every single search results, even when only one page is available from that site.

Yahoo! also has its own text and display ads, which show up alongside search results. Under the terms of the agreement, the ad platforms will be combined, at least for some markets, ad types, and certain customers. But for now, the ads at Yahoo! remain ones run by Yahoo!. Users aren't likely to see the combined ad network until 2011.

THE FUTURE YAHOO!

So what will the future look like? The agreement talks about collaboration for search and ads. Yahoo! will eventually use Microsoft's Bing search engine database for its search service while Microsoft gets a 10-year license to Yahoo!'s core search technologies. However, before it gets to that point, the agreement may be challenged at various levels, delayed, or possibly even dissolved.

No one knows for sure what the future holds for Yahoo!, but for the information professional, a couple of possibilities seem likely. First, if the deal goes through and plans do not change, its current unique web database will cease to be available. Sometime later in 2010, Yahoo!'s underlying database will be pulling results from Microsoft's Bing for web, image, and video searches. The relevance ranking, display, and search options could all be different, since Yahoo! has been making a point of having its own "user experience." The same search at Bing and Yahoo! could find different results or exactly the same ones. Some search features, like Search Assist, may continue to be unique to Yahoo!, or they may look very similar to Bing. In this scenario, either unique search features could keep us using Yahoo!, or the Yahoo! version could bring up better or more results.

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The public, including the searching public, has what appears to be an almost split personality approach to monopolies. On the one hand, a single search source removes the need to decide what service to use for a search. Ever since my earliest days teaching web searching, common questions from audiences primarily made up of librarians and information professionals have been, "What is your favorite search engine?" and, once Google dominance took hold, "Why search any of these others?"

Federated searching and metasearch engines demonstrate the same desire. It almost seems to be a search wish convergence for one, single search engine that answers all questions, needs, and desires—the sage on the mountaintop in a single search box.

On the other hand, common complaints against monopolies are that they are unresponsive and slow to change, and the lack of competition lets the monopoly set the price. Some say that Google is already less likely to innovate in search due to its market position. If it continues to increase market share, advertisers may have no other options than to pay whatever prices Google (or its tweaked algorithms) require.

Yes, Google is an unusual monopoly in that much of what it offers is free. Is it a monopoly in web search, when what it offers is free? For that matter, most other Google services (mail, calendar, and documents) are free as well. If there is no price, how can a monopoly benefit from its market dominance? The contextual advertisements make up the vast bulk of Google's income. So ever greater audience time on Google sites means there are many more ways to display and profit from those ads and from the targeted advertising based on its collection of data about its users. That collection of user data and the amount of time that ads can be displayed to users is the economic market that Google seeks. It also may help explain why Microsoft and Yahoo! hope that by teaming up, they can gain a greater share of the advertising market.

Will this loss of one unique database and the teaming up of two smaller competitors help make Microsoft-Yahoo! more competitive? More importantly, at the speed with which things change on the web, by the time the agreed-upon changes occur, will there still be time for either company to garner more market from Google, or will Google become even more dominant? Some say that this should open up opportunities for new and smaller search engines to compete. Whatever the future holds for Yahoo!, the opportunities for searchers are changing. In the event that both Bing and Yahoo! fail to innovate, expand their data coverage, and offer more search features, we may have to look harder for alternatives to the juggernaut Google.

Another possible option is that Yahoo! could create, buy, share, or build other unique databases that would keep information professionals interested in returning to Yahoo!. Consider its current databases, such as Finance and News, that could remain separate enough in content and features to make it a destination site or one that has sufficient content that gets found by a Google search.

Third, Yahoo! may become useful primarily for specific services it offers such as Delicious, Flickr, or even Yahoo! Mail. For the privacy-concerned, it can make sense to have something like email on a separate platform from web searching or your Google Docs accounts. In this scenario, Yahoo! will move away from a search destination to a web services destination.

Yahoo! has changed many times throughout its history—from directory to portal to search engine to whatever it will become in the next few years. Through it all, and despite Google's rise to prominence and then dominance, Yahoo! has remained one of the most highly visited sites online. Yahoo! will have its own database for some time yet, and it has potential as an important information resource or service site even after that change.

THE MONOPOLY FACTOR

While Yahoo! and Microsoft try this approach to combine their smaller market share, Google continues to dominate, innovate, and roll out new features and services to attract ever more searchers, users, and other advertising eyeballs. While Google may complain of Microsoft's monopolies or market dominance in other areas, Google seems to be on an unstoppable path of its own to monopolistic dominance of the search market and search-related advertising market.

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