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**SAMPLE:**

# Vertical Search (B2B) Report 2009

in association with Convera

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# SAMPLE: Vertical Search (B2B) Report 2009



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# Contents

1. About Econsultancy .....	1
2. About Convera (research sponsor) .....	2
3. Introduction .....	3
3.1. What is vertical search? Introduction by Convera .....	3
3.2. Methodology and sample .....	4
3.2.1. Respondent profiles: publishers and advertisers .....	4
3.2.2. Respondent profiles - supply-side .....	5
3.2.3. Geography .....	5
3.2.4. Business sector .....	6
4. Executive Summary and Highlights .....	7
5. Findings .....	9
5.1. Work-related internet searches .....	9
5.1.1. Advantages of vertical search .....	9
5.1.2. Frequency of business / work-related searches .....	11
5.1.3. Effectiveness of work-related searches .....	13
5.2. Site search, RSS feeds and widgets .....	15
5.2.1. Quality of search - B2B .....	15
5.2.2. RSS, widgets and customised home pages .....	16
5.2.3. Work-related bookmarks .....	18
5.3. Software as a Service (SaaS) .....	20
5.3.1. SaaS usage across business areas .....	20
5.3.2. Benefits of using SaaS .....	21
5.3.3. Disadvantages of using SaaS .....	22
5.4. Mobile (cell phone) search .....	23
5.4.1. Frequency of mobile search .....	23
5.4.2. Quality of mobile search .....	25
5.4.3. Mobile widgets .....	25
5.5. Professional online networks .....	26
5.5.1. Use of professional online networks .....	26
5.5.2. Specialist private groups .....	28
5.6. The publisher perspective .....	29
5.6.1. Site search .....	29
5.6.2. Software used for site search .....	30
5.6.3. Search log analytics .....	31



5.6.4.	Third-party content search.....	32
5.6.5.	Ability to search for third-party content .....	33
5.6.6.	Major challenges in moving business online .....	33
5.7.	The advertiser perspective .....	35
5.7.1.	Ad spend by channel .....	35
5.7.2.	Increases and decreases in ad spend .....	36
5.7.3.	B2B targeting .....	37
5.7.4.	Advertising via mobile .....	38
5.7.5.	Advertising via professional networks .....	39
5.7.6.	Advertising networks .....	40
5.7.7.	Major challenges facing advertisers.....	40



# 1. About Econsultancy

Econsultancy is the leading source of independent advice and insight on digital marketing and ecommerce.

Our reports, events, online resources and training programmes help a community of over 80,000 registered marketers make better decisions, build business cases, find the best suppliers, look smart in meetings and accelerate their careers.

Econsultancy is an [award-winning online publisher of reports](#) covering best practice, user experience benchmarking, market data and supplier selection aimed at internet professionals that want practical advice on all aspects of e-business.

Econsultancy also operates a highly popular [training](#) division, used by some of the world's most prominent brands for staff education, both in-house and via public courses. We provide training across all areas of digital marketing and at all levels from one day courses to diplomas to Masters in Digital Marketing.

In addition, we host more than 100 [events](#) a year, such as The Online Marketing Masterclass, regular Supplier Showcases and Roundtables, an annual Future of Digital Marketing event, Digital Cream and a range of social events.

The Econsultancy site now attracts 175,000 unique users per month where they access research, read the blog and take part in discussions in the forums. And as a portal to the digital marketing community, Econsultancy members can also link up with other members and digital suppliers through our directories, as well as find a new job or new digital talent using the job listings.

Some of Econsultancy's client-side members include: Google, Yahoo, MSN, MySpace, BBC, BT, Shell, Vodafone, Yell.com, Dell, Oxfam, Virgin Atlantic, TUI, Barclays, Carphone Warehouse, IPC Media, Deloitte, T-Mobile and Estée Lauder.

[Join Econsultancy](#) today to learn what's happening in digital marketing - and what works.

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## 2. About Convera (research sponsor)

Convera is a leading provider of vertical search and site search solutions for publishers. Based on a private semantic index of the Web and publishers' own content, Convera enables publishers to create a custom search service and associated widgets for a specific industry under their own brand, increase their online audience, and create revenue.

Convera's Software-as-a-Service (SaaS) search, and monetization solutions are delivered through a completely automated, self-service technology platform, saving publishers the significant time, money and resources needed to better compete in today's digital marketplace.

Using Convera's state-of-the-art semantic technology and [Publisher's Control Panel](#), publishers can significantly increase the value of their online presence by wrapping customized search, relevant web content, advertising and contextual merchandising services around their digital properties.

Our vertical and site search technology is based on advanced semantic and statistical technologies which combine advanced synonym recognition, semantic expansion, concept and entity extraction, disambiguation, and clustering methods to yield the most relevant search results with the end user in mind.

Convera's Publisher Control Panel enables creation and customization of search widgets and search refinements tools that help publishers extend the value of their content and enable integration of their information services to workflow of online audiences.

Convera technology utilizes a scalable, high performance search and ad platform that delivers completely customized search experiences for target audiences. Convera's web-scale search platform serves a daily throughput of millions of queries at sub-second response times. It is capable of supporting hundreds of simultaneous vertical search applications provided under 24x7 service level agreements.

Many of the world's largest publishers rely on Convera solutions to accelerate their e-publishing strategies, meet growing monetization goals and build loyal online professional communities. Publishers like Advanstar, Aspermont, Informa, United Business Media, Wiley Publications and Wolters Kluwer have turned to Convera for the comprehensive technology solutions required to create a more relevant search and content-rich experience for their end users and a more targeted environment for advertisers.

Visit [ConveraNet](#) now to see a complete directory of our professional online community sites and how you can join our growing publisher community.

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# 3. Introduction

## 3.1. What is vertical search? Introduction by Convera

Vertical search involves organization of content into a custom, specialised index and making the relevant information findable easily and quickly to the searcher. Content and resulting custom index may be organized based on a subject (specific domain or industry), content source (open-source, private, or proprietary), or content type (structured, unstructured, semi-structured), or some other attribute in order to make the information easy to find and relevant.

Examples of vertical search applications include [GlobalSpec](#) for engineers, [SearchMedica](#) for healthcare professionals and [MaritimeAnswers](#) for shipping industry professionals.

Vertical search has emerged as a solution to the problem that most web search engines are not suitable for information needs of specialised online communities, in particular business professionals. And, most enterprise search engines do not scale to the web.

Specific problems and challenges addressed by vertical search are:

- General (horizontal) web search engines such as Google, Yahoo, and Microsoft Live are not well-suited for information needs of professionals. They perform keyword search and rank results based on popularity. For example, when you search for OSM, you can get results for all meanings of the query - whether you are interested in medicine, shipping or engineering or you are interested in origins of minestrone soup, Orchestre Symphonique de Montréal, or Oregon Steel Mills.
- General web search engines index billions of pages from millions of web sites and return millions of results for most queries. The challenge for the user is information overload.
- Most web search engines are supported by [advertising](#) revenues and majority of ads are on them are targeted for consumers. That, coupled with the fact that results are ranked based on popularity, often leads to a frustrating search experience for users.
- Enterprise or site search engines are designed to index a small number of sites, and serve a few queries per second, and perhaps a few thousand searches a day. They do not scale and perform to thousands of sites and millions of searches a day.
- Typically, enterprise and site search engines are offered as licensed software. They require significant time and money for hardware, software, IT and software development resources to install, configure, integrate, and operate.

Web-scale vertical and site search holds promise for business professionals and the publishers and advertisers targeting those online communities with specialised information needs.

- **Users** - Semantic search, editorially-reviewed authoritative slices of the web, customisable ranking, and context-relevant search refinements can yield a highly relevant search experience. Downloadable search and taxonomy widgets make it easier and quicker to find relevant information which can feed into workflows.
- **Publishers** - Increasing unique visitors and page views can help accelerate online revenue growth. Software as a Service solution with self-service control panels and dashboards saves money on resources, infrastructure and software development costs, eliminating the need for IT resources.
- **Advertisers** - Targeted advertising with flexible advertising options for banners, relevant paid search and contextual ads, and editorially relevant advertorials can increase the effectiveness of campaigns and ROI.

## 3.2. Methodology and sample

More than 500 respondents responded to our research request to take part in the Vertical Search (B2B) survey carried out in October and November 2008.

This survey is a follow-up to a similar survey-based report<sup>1</sup> we published at the end of 2007. Once again, the audience for this survey was exclusively media and internet marketing professionals, including a large number of both publishers and advertisers.

Information about the research, including the questionnaire link<sup>2</sup>, was emailed to the memberships of the following organisations:

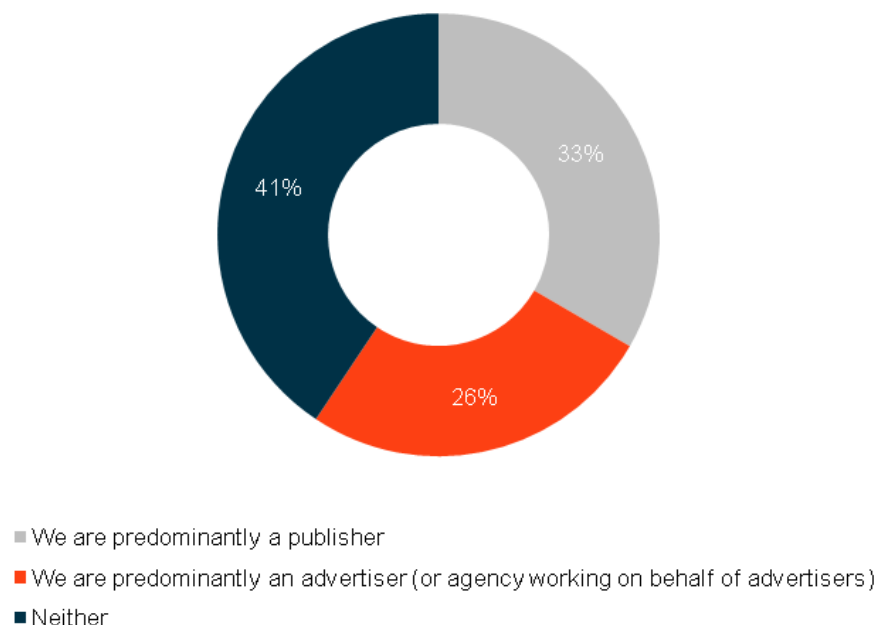
- Internet Advertising Bureau (IAB UK).
- Association of Online Publishers (AOP).
- American Business Media (ABM).
- Econsultancy (global user base of internet marketers and strategists).

The organisations surveyed represent an **early adopter audience** and as such are a highly relevant indicator of current and future trends.

The sample included 152 publishers and 118 advertisers, enabling us to conduct robust analysis within these two groups of respondents as well as looking at the sample of 'early adopters' as a whole. The respondents included people working across a range of business sectors. See *Figure 4* below:

### 3.2.1. Respondent profiles: publishers and advertisers

Figure 1: Which of the following best describes the type of organisation you work for?



Base (455)

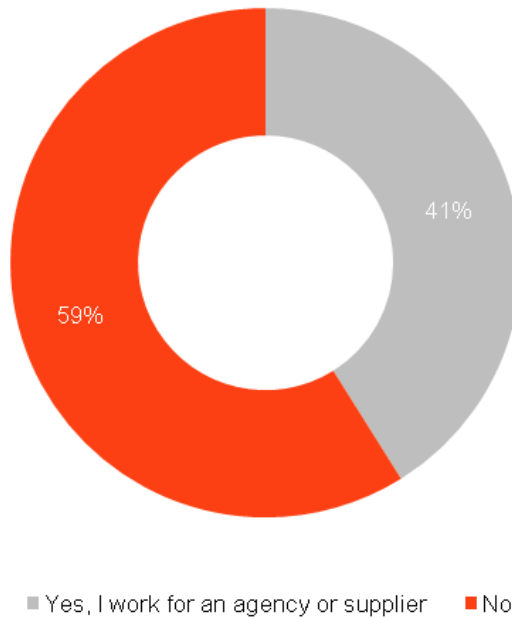
<sup>1</sup> Vertical Search (B2B) Report 2008

<sup>2</sup> Econsultancy uses Clicktools for its online surveys.

### 3.2.2. Respondent profiles - supply-side

Just over 40% of respondents work for an agency or supplier, compared to 59% who work for other types of companies.

Figure 2: Do you work for an agency or technology provider?

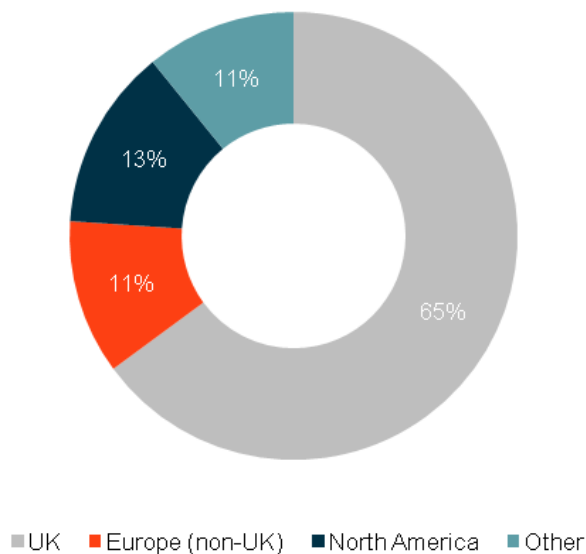


Base (455)

### 3.2.3. Geography

Just over two-thirds of respondents are based in the UK. The remainder work in mainland Europe or organisations based in North America. Those specifying 'other' included respondents from Australia, the Middle East, and China.

Figure 3: In which country/region are you (personally) based?

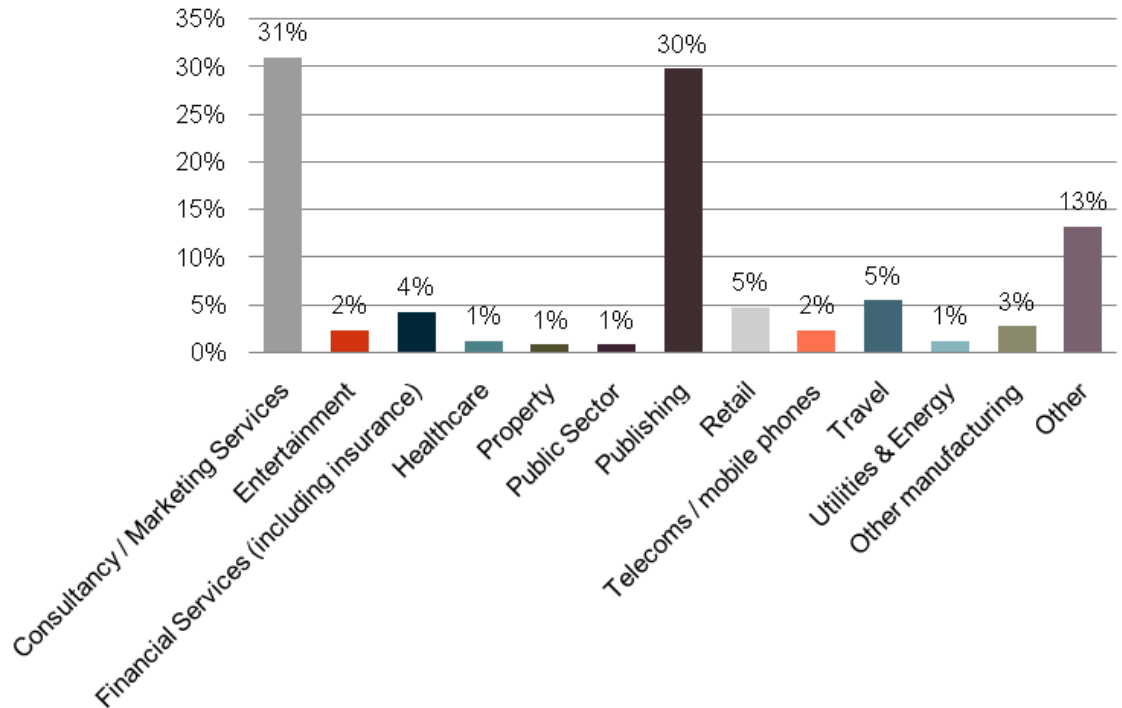


Base (445)

### 3.2.4. Business sector

As *Figure 4* shows, the organisations surveyed covered a wide variety of industries. As mentioned above, publishers and those working on the supply-side account for most of the sample.

Figure 4: In which business sector is your organisation?



Base (145)

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## 4. Executive Summary and Highlights

The second annual Vertical Search (B2B) Report, produced by Econsultancy in association with Convera, is based on a B2B survey of more than 500 media and internet marketing professionals.

The study examines how digital marketing and e-media professionals are finding work-related information online, looking at the use of both popular search engines and industry-specific websites.

In this context, the research looks at the advantages and disadvantages of vertical search over general search engines, as well as covering the use of RSS feeds, customised home pages, mobile search and online professional networks.

There is also a section on software as a service, the use of which is becoming more widespread both for site search and a range of other applications.

The research also looks at issues relating specifically to publishers and to advertisers, as these groups are both well represented within the overall group of media and internet professionals.

### Key findings:

- As was the case in 2008, the **need to find information quickly** is the main advantage of vertical search engines from the perspective of business users. Around two-thirds of respondents see the following factors as a “major benefit” of vertical search:
  - Quicker to find desired information (67%)
  - Top results more relevant (65%)
  - Focus on specific business interests and workflow (64%)

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# 5. Findings

## 5.1. Work-related internet searches

### 5.1.1. Advantages of vertical search

Figure 5 shows the perceived major advantages of vertical search engines from the perspective of business users. Around two-thirds of respondents see the following factors as a “major benefit” of vertical search:

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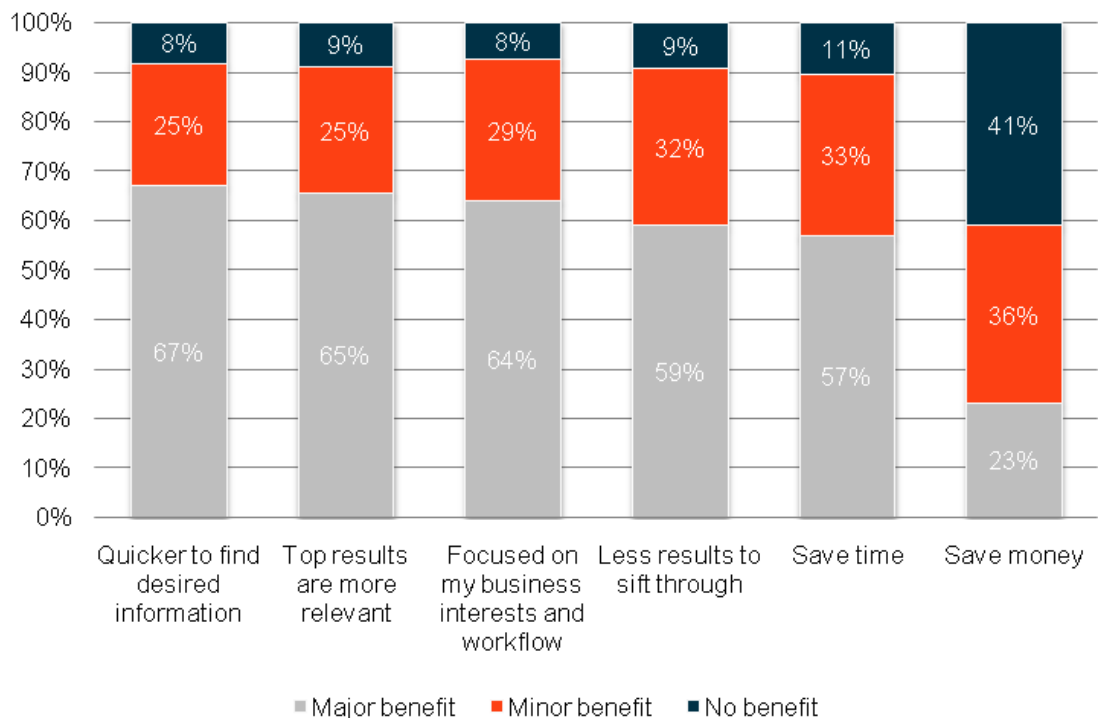


<http://econsultancy.com/reports/vertical-search-B2B-report>

In summary, business users can reap some definite benefits from vertical search engines. However, the next sections about usage and quality of results suggest that vertical search and B2B site owners are not actually delivering these benefits, and that they are often more theoretical than actually experienced.

#### 2008 results

Figure 5: As a business user, what do you see as the advantages of vertical search engines?



Base (502)



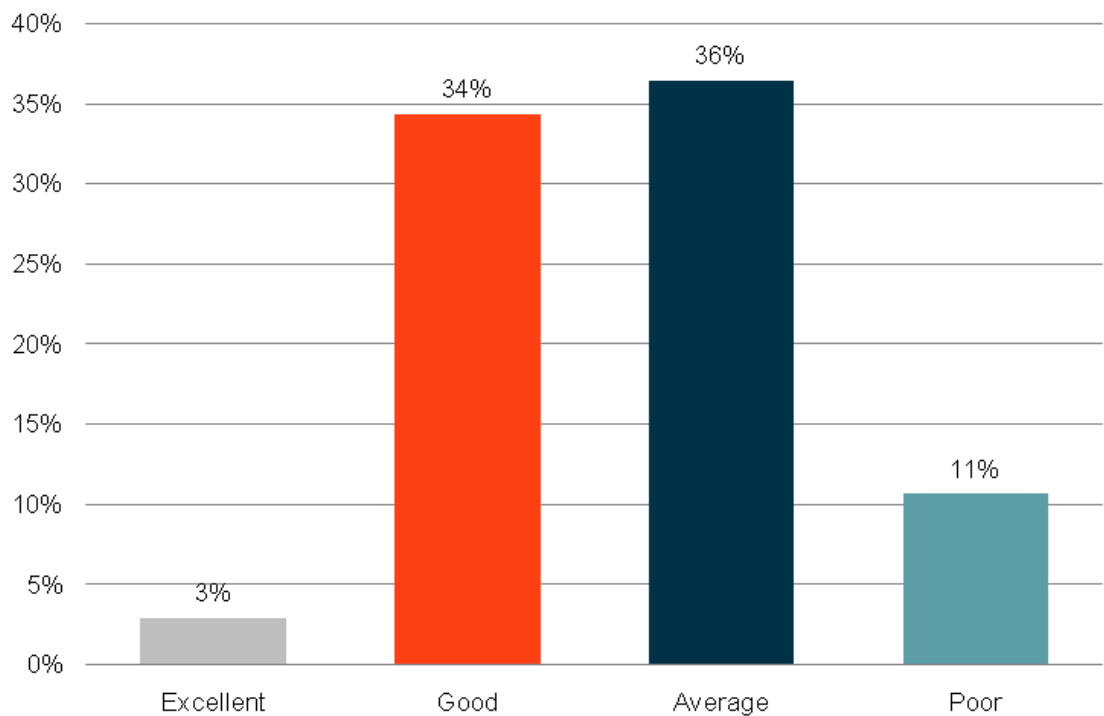
## 5.2. Site search, RSS feeds and widgets

### 5.2.1. Quality of search - B2B

Business users typically rate the quality of search results on B2B websites as “good” (34%) or “average” (36%).

Only 3% of respondents report finding “excellent” search results on B2B publishers’ sites, compared to 11% who rate the quality of search as poor.

Figure 6: How do you rate the quality of search typically found on B2B publishers' websites?



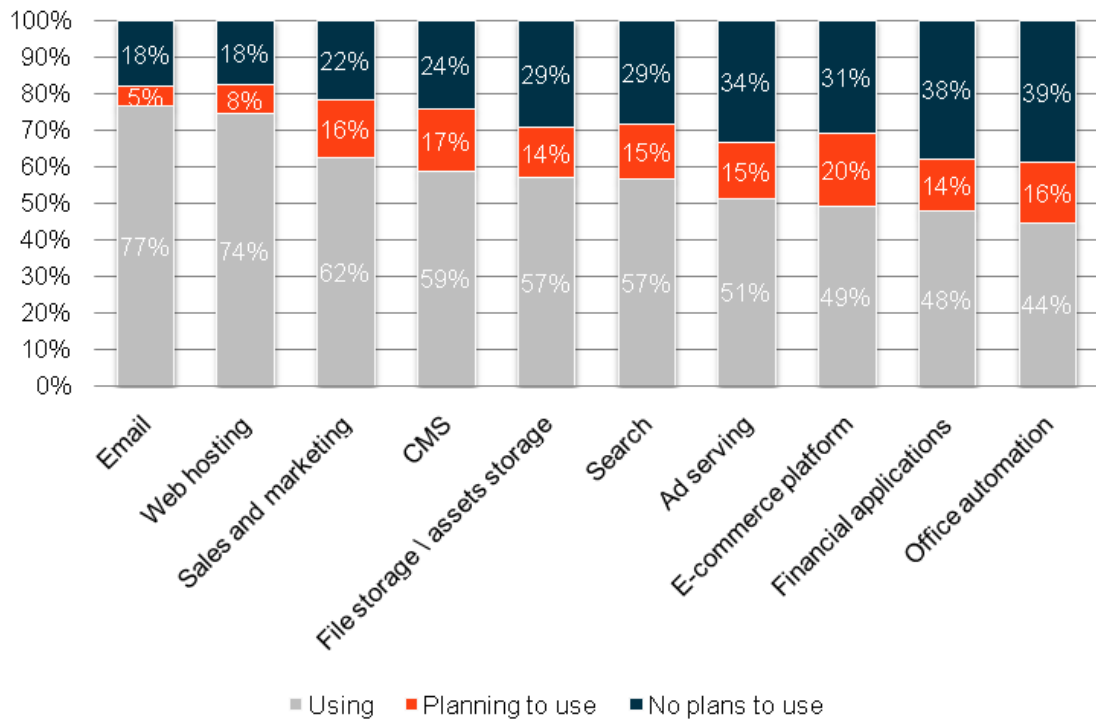
Base (480)

## 5.3. Software as a Service (SaaS)

Figure 17 below shows that more than half of survey respondents report that their businesses are using software-as-a-service (SaaS) for email (77%), web hosting (74%), sales and marketing (62%), CMS (59%), file and assets storage (57%), search<sup>3</sup> (57%) and ad serving (51%).

### 5.3.1. SaaS usage across business areas

Figure 7: In which areas does your business use Software as a Service?



Base (453)

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<sup>3</sup> Including the use of Google Custom or Google with a site:www.mysite.com filter



## 5.4. Mobile (cell phone) search

### 5.4.1. Frequency of mobile search

A third of internet marketing professionals (33%) never perform any kind of search on their mobile phone or PDA [Figure 20], while 42% never perform a work-related search on their mobile device [Figure 21].

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## 5.5. Professional online networks

### 5.5.1. Use of professional online networks

It can be seen from Figure 24 below that 61% of internet professionals access work-related online networks (such as LinkedIn) at least once a week.

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## 5.6. The publisher perspective

The findings in this section are based only on publisher survey responses.

The majority of publishers in this survey (53%) incorporate basic search site features on their site, compared to 41% who have integrated more sophisticated search tools. Only 6% have no site search features on their website at all [Figure 27].

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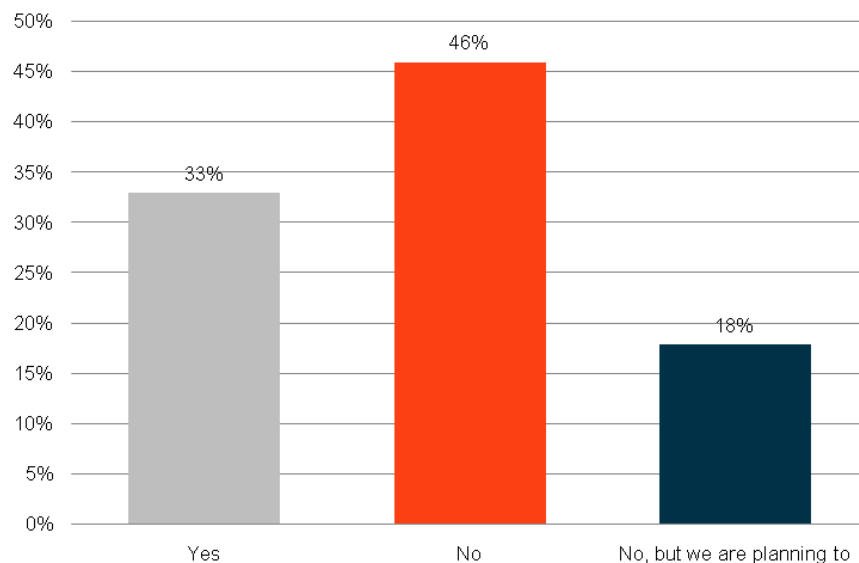


<http://econsultancy.com/reports/vertical-search-B2B-report>

### 5.6.1. Third-party content search

A third of publishers surveyed (33%) offer the ability to search third-party content from their website, and a further fifth of publishers (18%) are planning to implement this in the future. Just under half (46%) say they do not offer this facility and are not planning to.

Figure 8: Do you offer the ability to search third party content from your website(s)?



Base (146)

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## 5.6.2. Ability to search for third-party content

Publisher respondents were asked the main reasons why they do not include the ability to search for third-party content on their website or websites. Some publishers are against the idea of sending traffic to their competitors' sites, as they want to keep people on their own properties.

### Voice of the publisher – reasons for not including third-party content

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Publishers

## 5.6.3. Major challenges in moving business online

Those publishers who do not already have a thriving internet-driven business face a variety of challenges in moving their business online. In particular, a lack of education and online skills is holding back some businesses, with many managers and boardroom executives steeped in offline businesses and unable to embrace transition.

### Voice of the publisher – challenges in moving business online

Sample only. Please download the full report from:



<http://econsultancy.com/reports/vertical-search-B2B-report>

Publishers



## 5.7. The advertiser perspective

The findings in this section are based only on advertiser survey responses.

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### 5.7.1. Ad spend by channel

Advertisers were asked to indicate how their online advertising was split between different formats in 2008.

#### Voice of the advertiser – challenges facing advertisers

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Advertisers

