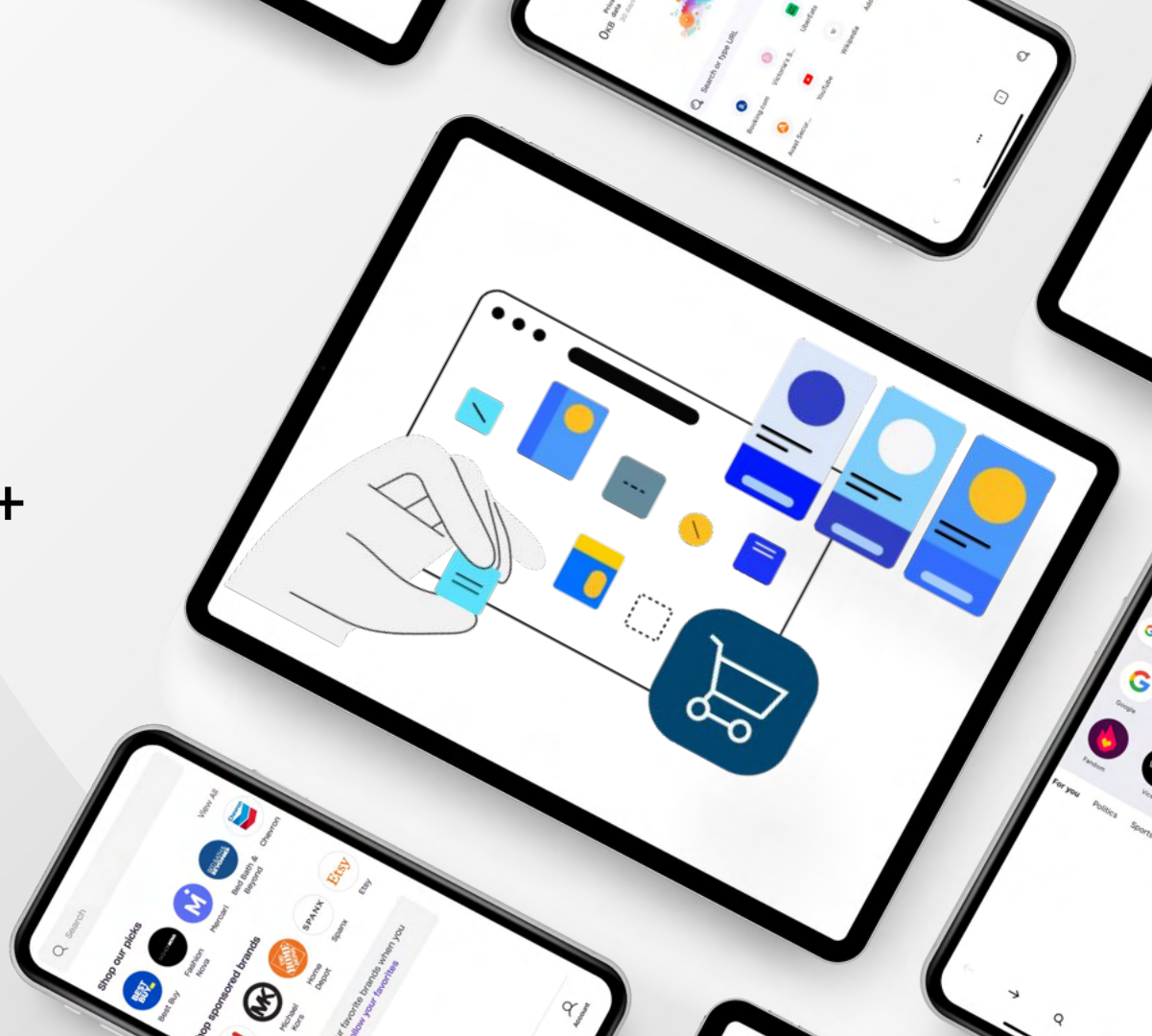adMarketplace

Next Gen Search: powered by Gen AI + Search Syndication
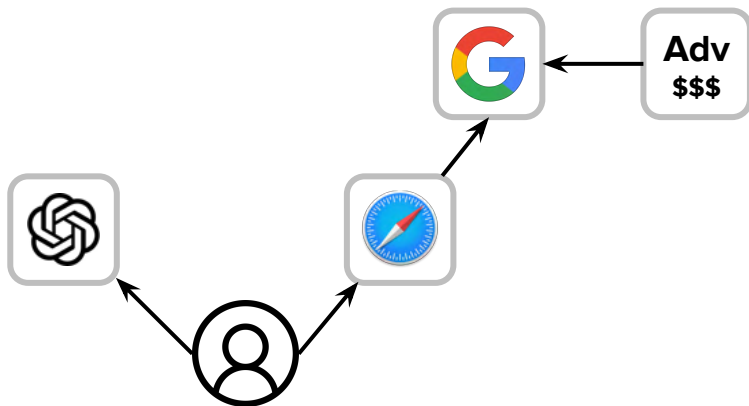
Next Gen Search | User Experience

Browsers compete to curate keyword and vector search experiences

Current State: Search Distribution
Google Hosts Default SERP

Post-Remedy: Search Syndication
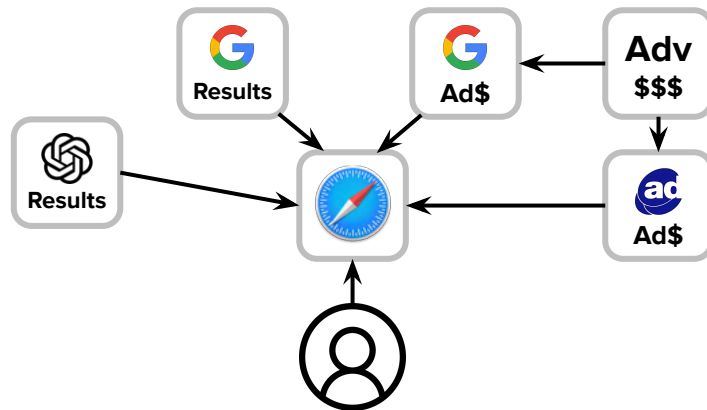*Safari* Hosts Default SERP

A user queries either ChatGPT or Safari. User queries on Safari are **pushed** to Google's Search Engine Results Page (SERP) through default search distribution agreements.

Google offers bundle of search results with search text ad revenue to Safari on an exclusive **"all or nothing" basis**.

A user query on Safari returns both ChatGPT and Google results because Safari **pulls** results and ads through non-exclusive search syndication licenses.

Safari SERP is a differentiated search experience **where search results and search text ads providers compete**.

Native Search | Revenue Flows
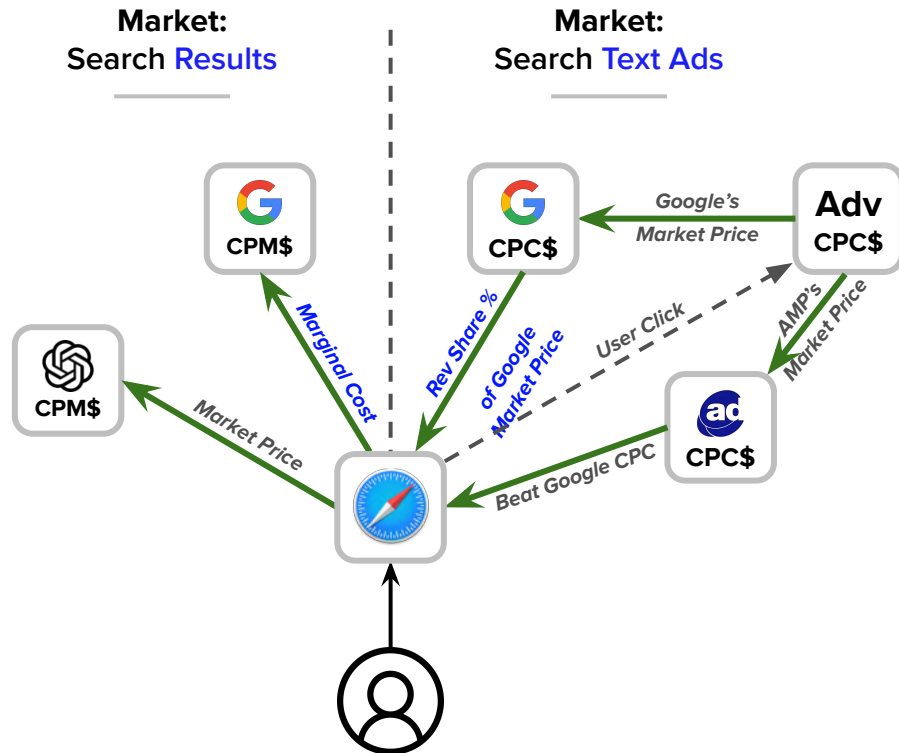## Search Syndication Remedy: Apple-Hosted SERP

In the Search Results market, Apple pays Google's **court-ordered marginal cost** and negotiates a market price with ChatGPT (CPM-based pricing).

In the Search Text Ads market, Google pays Apple a **court-ordered %** of Google-priced advertiser revenue from each user click.

adMarketplace competes for user clicks by offering a higher Cost per Click (CPC) to Apple.

The advertiser market negotiates with AMP and Google on CPCs which puts market pressure on Google's "supracompetitive pricing".

Apple SERP is **where search results and ads providers compete** through search syndication.
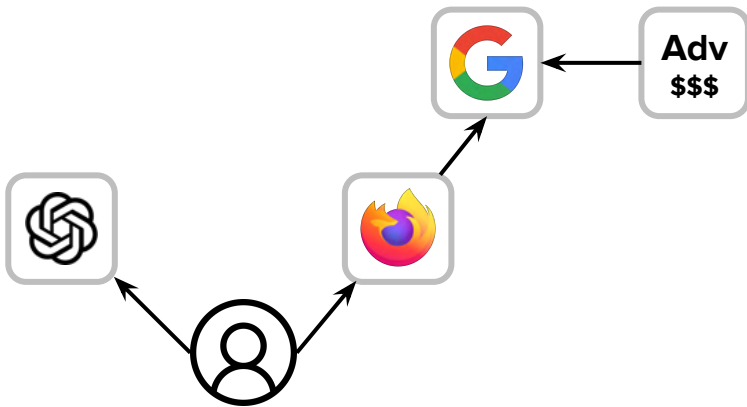
Market:
Search Results

Market:
Search Text Ads

CPM$

CPM$

CPC$

Adv
CPC$

CPC$

Google's Market Price

Marginal Cost

Rev Share % of Google Market Price

User Click

AMP's Market Price

Market Price

Beat Google CPC

Next Gen Search | User Experience

Browsers compete to curate keyword and vector search experiences

Current State: Search Distribution
Google Hosts Default SERP

Post-Remedy: Search Syndication
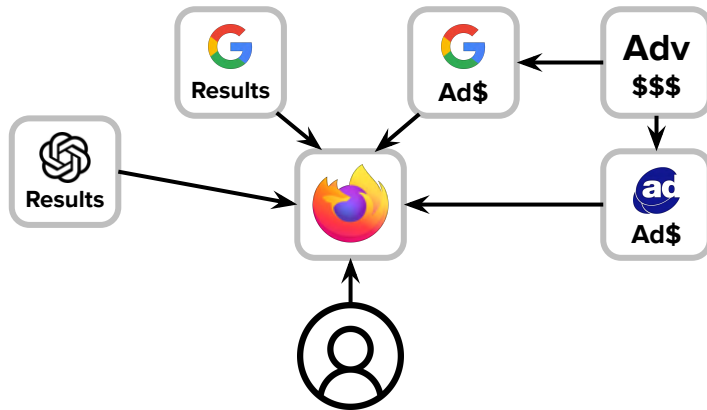*Firefox* Hosts Default SERP

A user queries either ChatGPT or Firefox. User queries on Firefox are **pushed** to Google's Search Engine Results Page (SERP) through default search distribution agreements.

Google offers bundle of search results with search text ad revenue to Firefox on an exclusive **"all or nothing" basis**.

A user query on Firefox returns both ChatGPT and Google results because Firefox **pulls** results and ads through non-exclusive search syndication licenses.

Firefox SERP is a differentiated search experience **where search results and search text ads providers compete**.
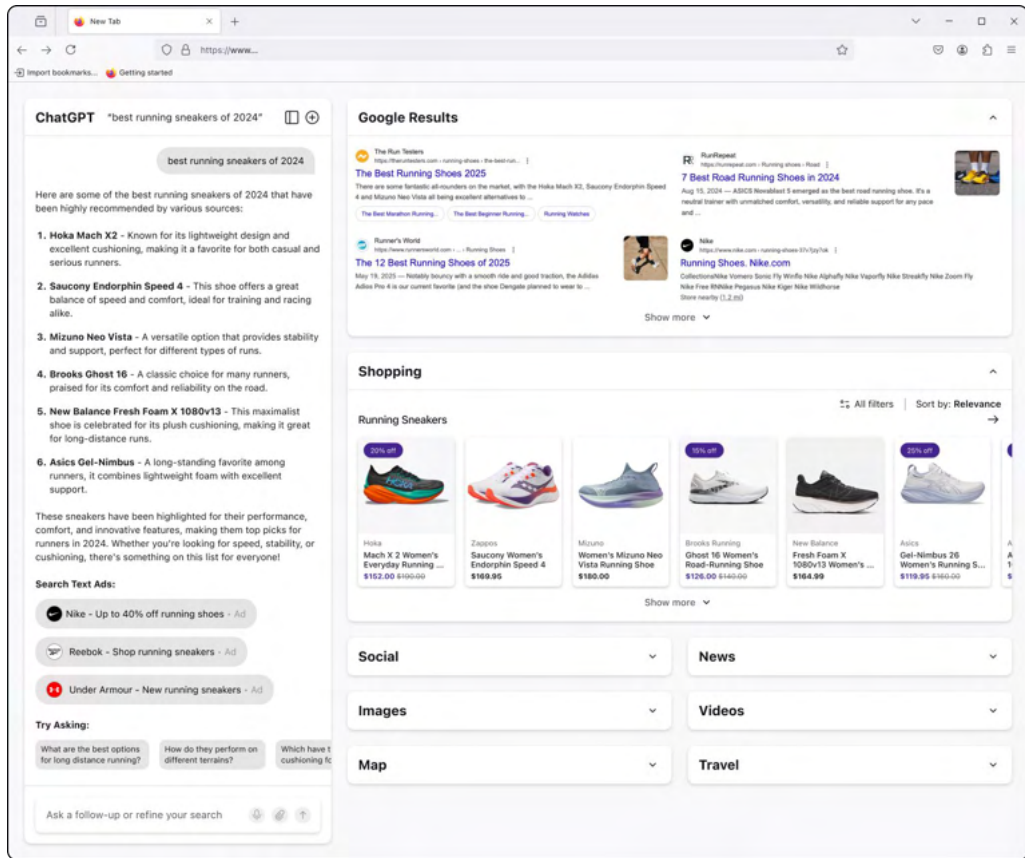
Next Gen Search | Browser War 3.0

Firefox's "Default" SERP (Mock)

With access to syndication assets from Google, Browsers will differentiate their search experiences to attract users to their "default" search experience.

Here is a mock-up of a Firefox default search experience that offers users a combination of vector and keyword search on the same SERP.

For the first time, users can see **Google search results right next to a ChatGPT response** (instead of Gemini).
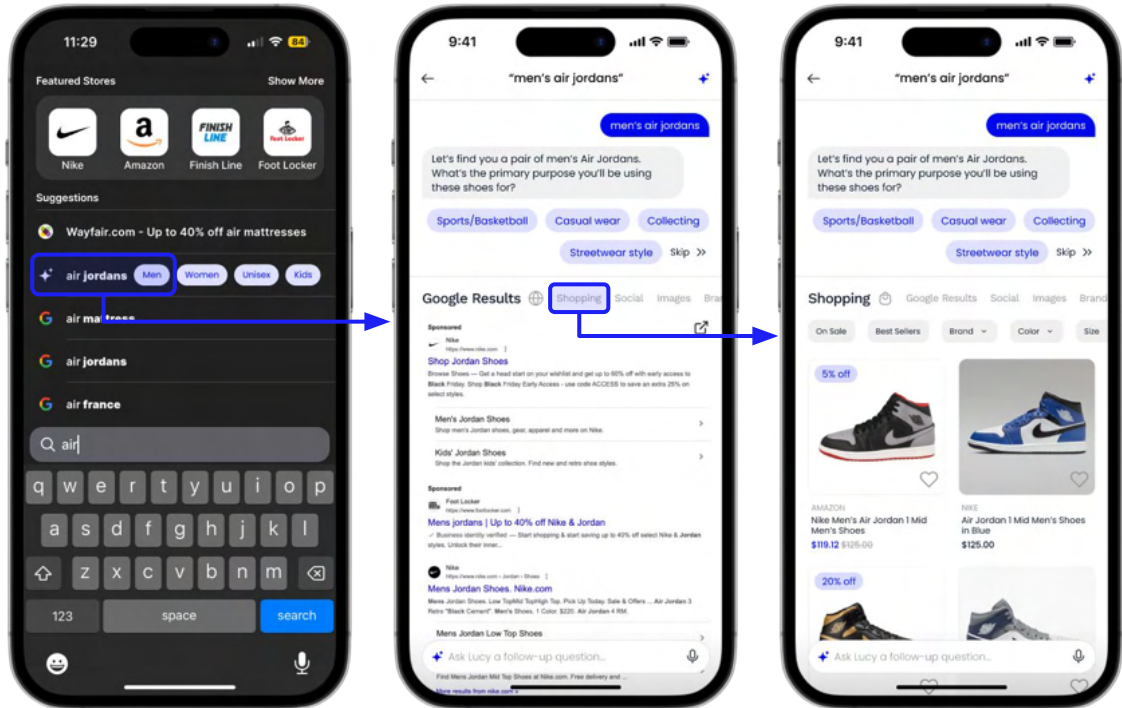
Next Gen Search | Browser War 3.0

Safari's "Default" SERP (Mock)

With access to syndication assets from Google, Browsers will differentiate their search experiences to attract users to their "default" search experience.

Here is a mock-up of a Safari default search experience that offers users a combination of vector and keyword search on the same SERP.

For the first time, users can see **Google search results right next to Apple Intelligence** (instead of Gemini).

1. User enters partial query "air" into Safari and engages with AI prompt for men's air jordans

2. User can engage with AI chat and Google results on the same surface

3. User taps the "Shopping" tab to explore relevant product results that match their query

Native Search | AMP Suggest

Next step in Next Gen Search

Native Search is when a user searches outside of a "legacy" search engine. For instance, on a browser new tab page like Firefox

Native Search Advertising is when a user searching outside of a "legacy" engine can navigate directly to an advertiser's landing page.

AMP Suggest is a Native Search Advertising product that allows users to directly navigate to advertiser sites based on partial query inputs.

AMP Text Ads

Vector Search Prompts

Google Suggest API