

A close-up photograph of a young woman with dark hair and bangs, wearing round gold-rimmed glasses and a dark blue leather jacket over a white collared shirt. She is smiling broadly, showing her teeth, and looking down at a smartphone held in her hands. The background is blurred, showing warm, yellowish light, possibly from city streetlights at night.

STRATEGIC
SPOTLIGHT

A NEW FRONTIER: VISUAL SEARCH

JULY 2018

INDUSTRY OUTLOOK

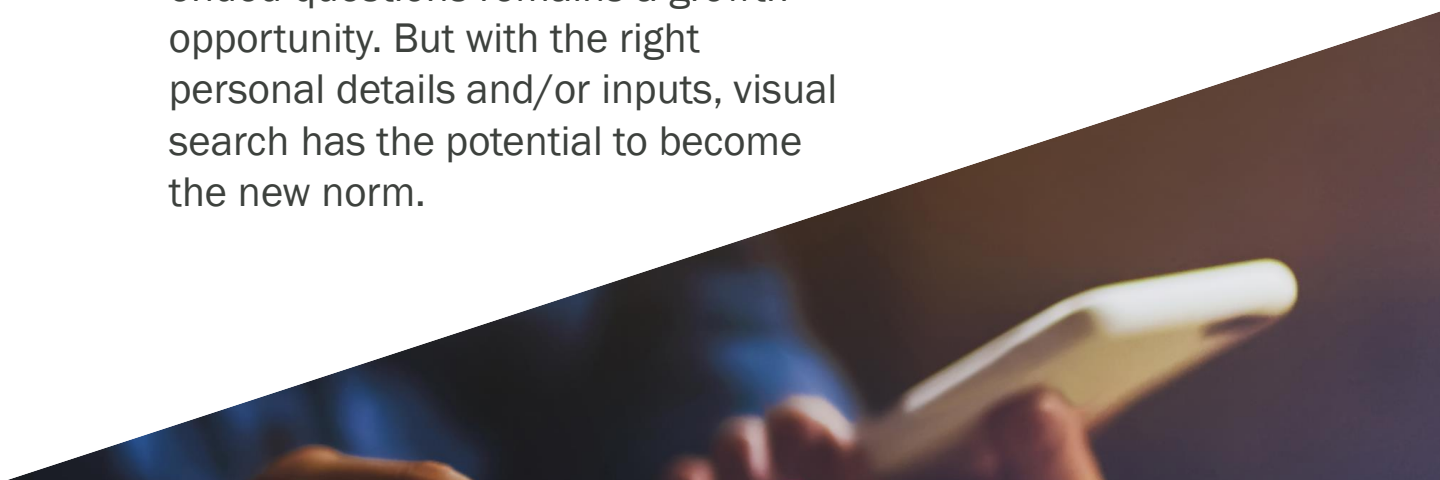
Search High & Low

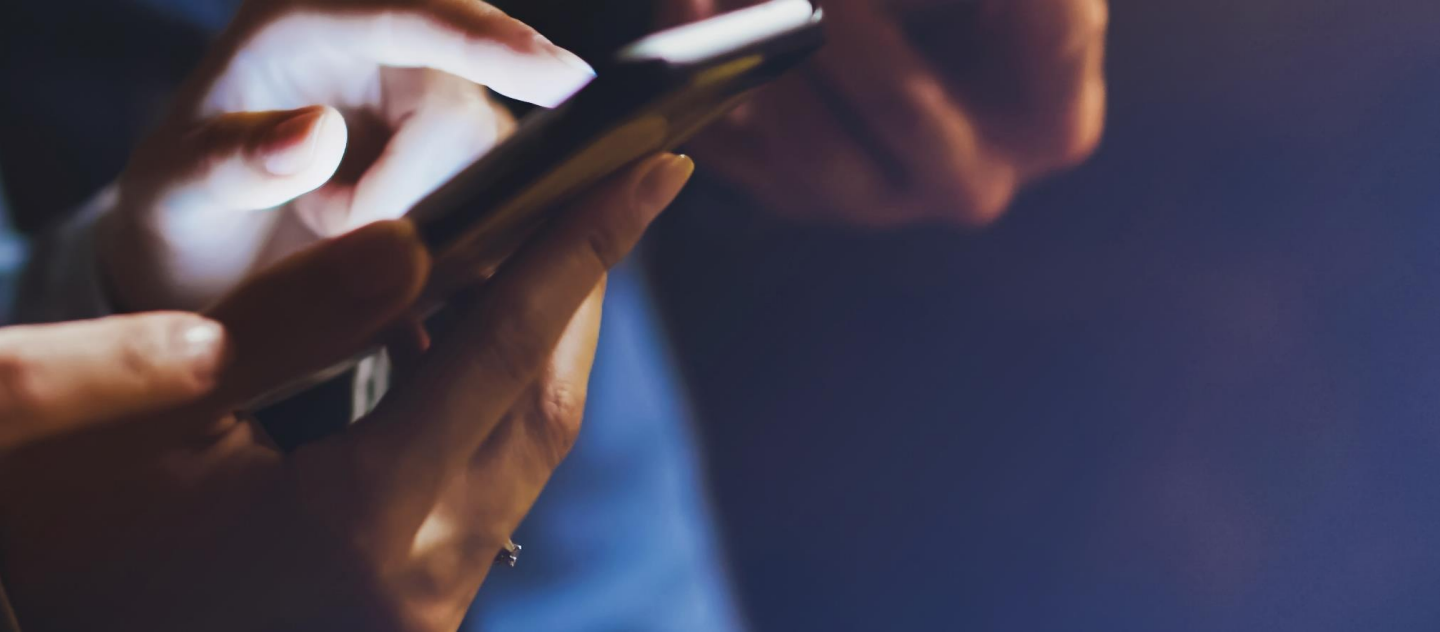
The search industry has quickly evolved over the past decade from text to voice to visual

through advances in personalization, natural language processing and multimedia results.¹

While this is great when one knows what to look for, posing a subjective question such as “What should I wear to work tomorrow?” or “How should I style my hair given tomorrow’s forecast?” are where these developments fall short.

Today, the opportunity to deliver quality results for these more open-ended questions remains a growth opportunity. But with the right personal details and/or inputs, visual search has the potential to become the new norm.





SEARCH

Then & Now

Traditionally, search has been text dominated despite varied outputs (e.g. video, image results) where the inputs have been text-based, restricting search engines' potential to extract more contextual meaning from a static data set (i.e. keywords).

Today, it's less about the keyword and all about the conversation, due to advances in machine learning and AI technology making search faster and more effective with the rise of voice and visual search.

Visual search is an active scan of the environment around you for a particular object or feature.

In other words,

**VISUAL SEARCH
IS A REAL
WORLD MIRROR
FOR DISCOVERING
REAL WORLD
RESULTS.**

FUTURE FORWARD

Visual Search is the Wave
of the Future

**Voice and
image search
combined may make
up 50% of all
searches by 2020 ²**



**40% of online
consumers say
they always look
for visual content
before purchasing ³**

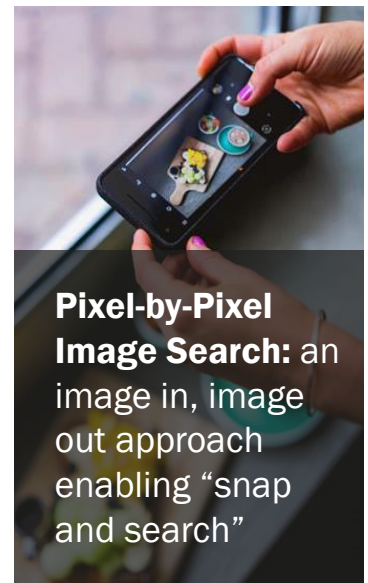
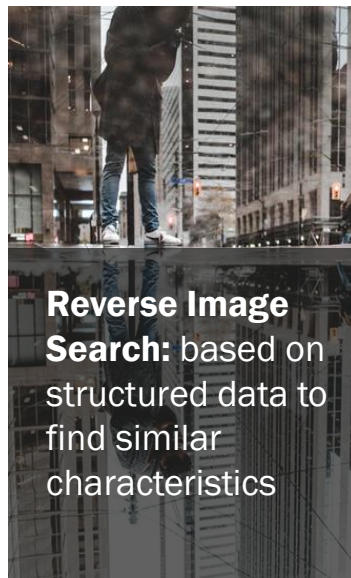
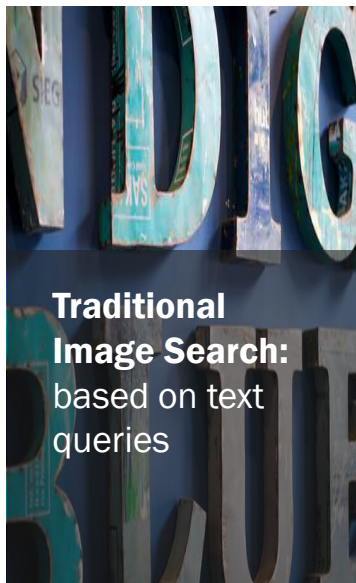
SEARCH EVOLUTION

What You Need to Know

Everything is visual, including search.

Visual search, coming into prominence in recent years, has already come along way since the launch of Google Goggles in 2011.

While there's still room for development before visual search can be deemed as reputable as text search, search engines are eager to capitalize on consumers' 24/7 browsing behavior.



An orange diagonal graphic element in the top-left corner of the slide.

IN A WORLD WHERE CULTURE IS DRIVEN BY SOUND AND IMAGE,

Consider visual search the new norm to elevating the way consumers browse and shop online.

INDUSTRY GROWTH

Expect a Rise in 'Visual Commerce'
to Meet Consumer Behavior

**The image
recognition market
will grow to \$26B by
2019, a growth of
216 % from \$10B in
2014 ⁴**

**Over 3 billion photos
are shared across the
internet every day.⁴**

**Consumers process
images 60,000 times
faster than text.⁴**

**74% of consumers
say text-based
keyword searches are
inefficient in helping
them find the right
product online ⁴**



WHY IT MATTERS?

The Power of a Picture

Visual search has the potential to bring together content and commerce, quickly moving consumers between the priming and active stage of decision making in a fleeting moment via an image.

As the gateway to product discovery, continued advancements and product introductions such as Google's Lens are turning the mobile phone into a visual search engine and creating frictionless experiences that drive conversion.

WHO TO WATCH

Amazon, The Visual Search OG

While a bit later to the search game, Amazon is bridging the gap between text, voice and image to drive consumer action.

Consumers continue to shift in their shopping habits, relying more heavily on search to dictate what goes into the shopping cart.

Amazon, with an estimated half of today's U.S. online retail spend, has become so embedded in consumers lives that it is intercepting the search paradigm and progressively competing for shoppers as voice and visual search create opportunities to reach buyers with real-time recommendations.

It's range of hardware – the Amazon Echo, Show and Spot – creates an ecosystem of opportunity that may soon see Amazon taking the throne in visual search.

WHO TO WATCH

Pinterest, The Pioneer of Progress

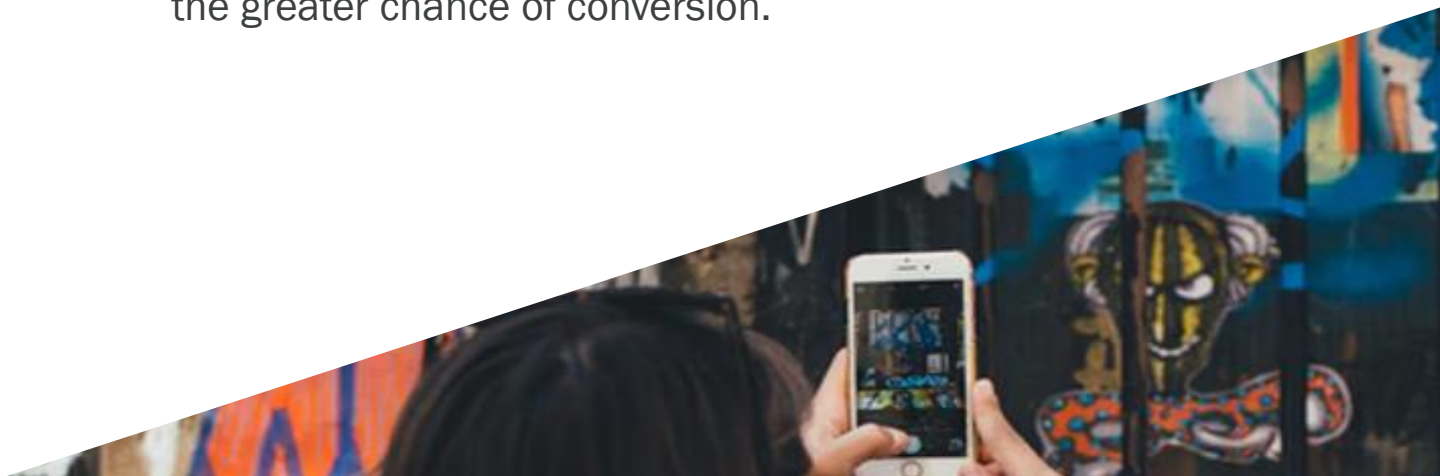
Pinterest Lens combines computer vision with human curation for product recommendations and inspiration

Did you know 600M+ visual searches are performed on Pinterest each month? ⁶

With the acquisition of image recognition tool Visual Graph and machine learning specialist Kosei, Pinterest has made technological strides with the launch of Pinterest Lens in 2017.

The power lies within the app as users are able to search beyond text queries by the snap of a photo and instinctively have search results returned that more accurately match their input.

The more connected a consumer is between an in-store experience and an online experience, the greater chance of conversion.





MORE KEY PLAYERS

GOOGLE

Serves up detailed information about an unknown object, place or thing with just a snap

BING

Singles out where and how to purchase a product of interest embedded within an image

EBAY

Enables users to shop their photos from their phones, social networks or web

IN THE FORESEEABLE FUTURE

Sight & Sound

Visual search tools are changing what it means to search but have we reached the tipping point where this behavior trumps text?

In a world constantly providing new levels of detail and customization, it's less about proactive visual search and more about continuous search, impacting how we view search's role in the purchase journey.

It's no longer about pulling in information that's consistently pushed out in an ever-increasing number of spaces and formats.

As we view language overall as a fluid system of noises, signs and symbols (vs. a fixed set of spoken or written words), we create a more compelling and profound depiction of the future of search where brands have the opportunity to deliver relevant and reliable content and results to move consumers from the Priming to Active stage.

HARNESSING VISUAL SEARCH

Key Considerations to Move
Consumers to Conversion

1

SHOW AND TELL

discover your categories ability to drive engagement with an image

2

CONTEXT IS KEY

provide product context to enable consumers to make decisions quickly

3

LEVERAGE PARTNER INVESTMENTS

to test and learn alongside key digital players looking to offer utility

4

ELIMINATE LENGTHY STEPS TO CHECKOUT

optimizing technology to drive conversions



SOURCES:

1. [Boyd, C. \(2017, July 5\). Visual search: Everything you need to know \(so far\)](#)
2. [Bhuiyan, J. \(2016, June 1\). Mary Meeker: Voice and image searches are going to make up at least half of all searches by 2020](#)
3. [eMarketer. \(2017, June 8\). How Visual Commerce is Changing Retail](#)
4. [Liffreing, I. \(2017, June 28\). What to know about visual search](#)
5. [Lunden, I. \(2018, July 13\). Amazon's share of the US e-commerce market is now 49%, or 5% of all retail spend](#)
6. [Brownsell, A. \(2018, May\). Trend Snapshot: Visual Search. WARC](#)

MORE INFORMATION:

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