

January 31, 2025

Dear case team,

I am writing on behalf of Raptive, which provides advertising and related services to more than 5,000 web publishers. Publishers are selected based on quality content (vetted by human review) and sizable human audiences. We appreciate the opportunity to comment on the upcoming CMA investigation of Google Search, and we believe that the interests of the high quality publishers we represent is generally aligned with the interests of web users in the UK, who seek high-quality, fairly ranked search results.

In 2025, Google Search consists of two separate products, tied together with a common interface: web search and zero-click search. Web search provides search results that are intended to describe or summarize a web page that might provide the information searched for. Zero-click search provides some AI-generated or otherwise obtained information within the search result page itself.

While Google clearly has strategic market status (SMS) in web search, zero-click search is an emerging area where other firms are credible contenders. The Competition and Markets Authority should investigate Google's leveraging of market power in web search to self-preference its own zero-click search, in order to understand the impact on web users, publishers, and competing providers of new zero-click search products. The CMA should consider investigating several key research questions.

When users turn off Google's zero-click search, and use web search only, are they more or less satisfied with the quality of results? Anecdotal evidence suggests that Google's zero-click search, still in the early stages of development, can present false or misleading information to users. Research in this area may inform future conduct remedies. (For example, if users want the option of combining zero-click and web search results, and are satisfied with Google Search but dissatisfied with Google's zero-click search, a future remedy might require Google to make a web search API available on non-discriminatory terms.)

Is the available AI training opt-out functionality already required in other jurisdictions adequate for the needs of web users and publishers in the UK? For example, standards for "expressly reserving the extraction" of content for AI training are already required under the AI Act in the EU. Google has chosen to give a preference to its own zero-click product by tying the opt-out for zero-click search to the opt-out for web search. Research is needed to understand the terms under which publishers prefer to express their permission for use of their site content to provide web search and zero-click search, which may differ. Web publishers who have a meaningful ability to opt out are in a position to negotiate AI training agreements with AI firms that do not also have SMS in search. Studying the terms of these agreements would help CMA evaluate the importance of granular opt-outs for publishers.

Do opt-outs for other Google services have an impact on a site’s ranking in Google’s web search? In 2023, Google agreed with the CMA that opting out of Topics API, part of Google’s “Privacy Sandbox” suite of advertising features in Google Chrome, would not affect a site’s placement in Google Search results. Since then, the CMA has asked Google about the search ranking impact of other opt-outs, and there has as yet been no answer. The CMA should conduct a thorough investigation into whether opting out of Google services other than web search—such as AI training and advertising features—negatively impacts a site’s ranking in Google’s web search results. If Google is found to be leveraging market power in search to give a preference to its other services, adopting remedies regarding search ranking factors would be prudent.

Thank you for your consideration. I would be happy to answer questions or provide any additional information.

Sincerely,

Don Marti
Raptive

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