Skyscanner's response to the consultation on the CMA's updated proposals for a User Choice Conduct Requirement in relation to Google's general search services

9 October 2026

Introduction

1. Skyscanner welcomes the opportunity to respond to the CMA's consultation on its updated proposals for a User Choice Conduct Requirement (CR) for Google's general search services.

2. Skyscanner is a UK-founded and -headquartered travel metasearch service that helps consumers to find the best travel options for them by scanning over 150 billion prices every day from over 1,400 partners. The transparency and competition we provide leads to more choice and lower prices for British families.

3. Many consumers continue to start their travel search on upstream services, whether that is Google Search or, increasingly, an AI assistant. Which search service users choose can impact their likelihood of navigating to a third-party site, their ability to compare the broadest possible number of options, and - ultimately - find the best deal.

4. Google's dominance in general search for nearly two decades has enabled it to self-preference its own specialised search services and unfairly direct users to its own travel products. It has also been able to continuously reduce the quality of its advertising services to UK businesses, with prices rising at the same time as control and transparency for advertisers has declined. A more competitive search market would incentivise Google to change its conduct.

5. For the first time since Google cemented its dominance in general search, new services have emerged in the form of AI assistants that are both capable of serving the same user search needs and that have grown to a size that could allow them to feasibly challenge Google's position. Yet the rise of generative AI is just as likely to cement Google's position. Its rapid integration of search generative AI features into Google Search demonstrates its continued advantage: the number of search queries on Google are at all-time highs, while AI Overviews reach over 2.5 billion monthly users, and AI Mode over 1 billion monthly users.

6. Despite the rise in usage of AI assistants, and signs that consumers increasingly use them for general search purposes, Google Search remains a critical gateway through which consumers discover, compare and access travel services, in part due to its significant distribution advantages.

7. For all these reasons - the evolution of the search market, the rise of new AI services, Google's continued importance as a user acquisition channel for businesses across the economy, the positive impact on competition in downstream markets from more competition in search - Skyscanner broadly supports the revised User Choice CR.

8. We believe it is likely to be effective and view its imposition as proportionate. We welcome the CMA's willingness to amend its proposals in light of market developments, in particular the rapid convergence of traditional search and AI-based services, and its move towards a more technology-neutral approach to eligibility. We consider that increased competition in general search is likely to deliver significant benefits not only for users of search services, but also for consumers and businesses in downstream markets such as travel, by placing greater competitive pressure on Google to treat its business partners more fairly and to present more relevant search results to consumers.

Question 6.1(a): Agreement with the proposed changes to the User Choice CR

Eligibility criteria and the inclusion of AI services

1. Skyscanner supports the changes the CMA has made to the eligibility criteria overall. We agree with the move towards technology-neutral criteria that allow a broad and compelling range of competing providers to appear on the Search Choice Screen, and we support the CMA's decision to remove the requirement that general search be a "core and central" part of how an eligible service is operated and marketed (the former Criterion 4). Even Google Search increasingly emphasises its generative AI features in its marketing.

2. In particular, we welcome the possible inclusion of AI-based services within the scope of eligibility. The distinction between traditional search services and AI assistants is increasingly blurred. Google Search continues to incorporate ever greater functionality associated with AI assistants, including AI Overviews and AI Mode, while Gemini is increasingly integrated into the same Google ecosystem and consumer access points as Google Search.

3. Meanwhile, consumers increasingly use AI assistants to perform precisely the discovery functions they previously performed through a search engine, including for travel research, planning and booking. For example, recent invocations of our ChatGPT mini- app [✂].[1] Meanwhile, Google recently placed a link to Gemini on its UK homepage inviting users to try Gemini when planning their next trip - a task many users usually begin on Google Search.

4. In these circumstances, the fact that an AI assistant can perform functions other than search should not prevent it from being treated as a search service where it performs the functions of general search. Whether a service can meet the use cases of a general search engine to a suitable technical standard should be determinative, rather than how a service is marketed, the technology through which equivalent functionality is delivered, or user attitudes. As the CMA's user research makes clear, users are increasingly employing AI assistants for search purposes even if they consider them to be different from general search services.

5. We also encourage the CMA to keep the scope of Google's SMS designation under active review in light of this convergence. If Google or the CMA were to judge that Gemini meets the eligibility

[1] The mini-app has to be invoked directly, which many users are unaware of, so the overall increase in usage of ChatGPT for travel queries is likely to be much larger.

criteria established under this CR, the CMA should treat that as evidence that Gemini now falls within the relevant digital activity and proceed promptly with a consultation on bringing Gemini within scope of Google's SMS designation, as it indicated in its Final SMS Decision.

6. Enabling AI assistants and other alternative providers to compete more effectively with Google Search could, over time, provide a feasible alternative route for businesses to reach consumers on a more sustainable and fair basis. Because the way consumers are directed at the search layer affects competition between businesses further downstream, providing end users with greater choice over their search service could have a positive impact on competition in downstream markets such as travel, increasing the consumer and competition benefits of the draft CR.

Transactional queries as a Criterion 1 use case

1. Our principal concern with the eligibility criteria is the inclusion of transactional queries, described as queries "to find a product or service a User may wish to buy", as a use case that an Eligible Provider must adequately address under Criterion 1.

2. Answering transactional queries is not, in our view, the role of a general search service. A general search service has traditionally enabled consumers to identify and navigate to third-party businesses offering relevant products and services. It does not follow that the general search provider must itself provide a specialised search function.

3. The inclusion of this use case risks giving an unfair advantage to Google's own search services in any eligibility assessment. Google has progressively integrated its own long-established vertical search services directly into its search engine results page. Yet just because Google has developed a vast ecosystem of downstream specialised search services, and thereby shaped consumer expectations of the use cases of a general search service, it does not change the fact that answering transactional queries is not a core purpose of a general search service. It is notable that the use cases outlined in the interpretive notes are derived from consumer research and Google's own submissions.

4. Dedicated specialised search services exist precisely to serve a distinct consumer need, and they rely on a wholly different technical architecture that requires significant expertise to provide. As the European Commission made clear in its July 2026 decision on Google's compliance with Article 6.5 of the Digital Markets Act, enabling users to find and compare individual products and services serves a purpose that goes beyond that of a general search service, and the integration of such features into a results page does not negate the fact that they serve a functionally different role from general search.

5. Many search services will not answer transactional queries in the way Google does, nor will they have their own specialised search services that they can integrate into search results or AI summaries. They may not be able to help consumers find a *specific* product or service that they may wish to buy. Yet that does not, in our view, mean they do not meet the main use cases of a **general** search service. Provided they can adequately direct users to websites that do enable

them to find and compare specific products and services (i.e. if they can respond to online navigational queries), they have fulfilled their role as a general search service.

6. To avoid granting Google services an unfair advantage in the application process, we consider that answering transactional queries should not be included as a use case under Criterion 1.

7. If, however, the CMA decides to retain this use case, it should amend the interpretive notes so that this does not grant an unfair advantage to Google. Specifically, it should make clear that a service responds "adequately" to a transactional query where it quickly directs users to third-party specialised search services or, where services integrate specialised search results into the results page, they must source and select content from a suitable range of providers, and present to the consumer a choice that is reflective of the whole market. In particular, the interpretative notes should make clear that:

   (a) to adequately address a transactional query, a service must enable users to discover and access products or services offered by a wide range of third parties; and

   (b) a service that, in response to transactional queries, sources content only from its own specialised search services, or otherwise presents results that are not representative of the relevant offers available in the market, cannot be treated as adequately addressing that use case and so cannot qualify for the Search Choice Screen.

8. This safeguard would focus the assessment on the consumer need being met, rather than on whether a competitor replicates Google's particular approach to vertical search. It would likely increase the number of eligible providers on the Search Choice Screen (thereby increasing user choice and engagement with the Screen), protect competition in downstream markets and help to ensure that eligible providers offer a suitable search experience for both businesses and consumers. This would also support user confidence in their choice of search provider.

9. We consider these recommendations to be especially important as agentic AI capabilities are integrated into more search services: given the reduced transparency for both consumers and businesses and the greater scope for services to shape consumer decisions as a result of agentic AI, services answering transactional queries must do so in a way that is transparent and fair, which includes selecting sources that are representative of the relevant offers available.

Attribution requirements

1. Skyscanner strongly welcomes the attribution requirements in paragraph 31 of the proposed interpretative notes, under which eligible providers using generative AI summaries must ensure that web content is clearly and accurately attributed and that users have a clear means of accessing that content.

2. This is an essential safeguard. A clear means of accessing the underlying web content is a key ingredient of answering navigational queries, while clear and accurate attribution is important for helping users corroborate AI-generated answers, given their potential to hallucinate.

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Accurate attribution (including the accurate presentation of a business) is also extremely important for maintaining brand value and consumer trust.

3. In this way, this provision will support consumers' confidence in services integrating AI summaries. We believe this is likely to lead to greater engagement with, and confidence in, alternative services - boosting the effectiveness of the CR.

4. It is also an important protection for businesses, particularly in sectors such as travel, where third-party websites invest significantly in the information and inventory that AI summaries depend on. AI summaries that answer a query directly with no attribution may give consumers less reason and opportunity to visit other websites.

5. This is borne out by public data. AI assistants currently provide significantly less referral traffic to third-party websites than traditional search engines, despite their rapid growth in user numbers.

6. For example, AI assistants account for [✂].

7. There are likely many reasons for this, and we expect to see continued growth in AI referrals over time. It also remains the case that [✂] come from ChatGPT, because Gemini does not surface third-party content in response to high-intent transactional prompts on Gemini for logged-in users.

8. Yet it appears that, at present, AI assistants are structurally less likely to refer traffic to third parties than traditional search services, in part because of limited attribution. Studies consistently show that AI assistants provide no citations for a large share of the AI summaries they generate. And it is notable that we continue to receive [✂], despite the latter's' rapid growth in monthly average users and their larger user base.

9. That is both why our recommendation above on sourcing and selecting content from a range of sources for transactional queries and the attribution proposal are so important.

10. Without a strong attribution requirement, there is a risk that the User Choice CR could further undermine the ability of businesses and publishers to acquire organic traffic, and thus to see a fair return on their investment in content and inventory. For example, [✂]. Without robust attribution requirements, there is a clear risk that the outcome of the User Choice CR is even lower organic traffic rates for publishers [✂].

11. If structurally lower levels of organic traffic for publishers lead to less investment in content, this could reduce the ability of search services to generate accurate, up-to-date AI summaries, undermining consumer confidence in alternative services and reducing choice.

12. Given its importance to both the effectiveness of the User Choice CR and wider consumer and business outcomes in downstream markets, we believe the attribution requirement should be strengthened in the following ways:

(a) Given its importance to the aim of the CR, the CMA should consider moving the substance of paragraph 31 into the text of the User Choice CR itself, so that it is a legally binding criterion that Google must have regard to;

(b) A "clear means to access" a website should mean more than the technical presence of a citation. While services should be free to make reasonable design choices as they see fit, links and attribution should be sufficiently prominent and usable to provide a meaningful route to the underlying third-party content and should not require an additional step on the part of the user in order to view them. That means that citations should not be hidden behind icons or require users to scroll through less visible side bars. This would align with the requirement under Criterion 1 for services to adequately respond to navigational queries: it must be suitably easy for users to actually navigate to a third-party site. Visible links to third-party websites are a key feature of general search services.

(c) While we agree that there will often be many ways for a service to adequately respond to a user query, given how important branded keywords or prompts are to publisher traffic, we do believe that suitable attribution should require a service to include a **prominent** link to a publisher's website in response to a branded keyword or prompt, including a single-word prompt. This prominent link should be included in the very first AI summary provided to the user, and it must be included in the body of the response.

(d) The Interpretive Notes should be amended at paragraph 32 to make clear that services should not frequently include inaccurate information or misrepresent a product or service in response to relevant prompts or queries. Google should design a fair, transparent and objective means for assessing this, with oversight from the CMA.

Consumer choice over AI features in Google Search

1. Finally, we encourage the CMA to reconsider whether consumers should be given the ability to turn off search generative AI features, such as AI Overviews and AI Mode, within Google Search.

2. As Google Search itself becomes increasingly AI-based, there is an important question about the meaning of consumer choice. A choice between services that increasingly prioritise AI-generated answers may not give consumers a genuine choice, particularly for those consumers who want a more 'traditional' general search experience centred on navigating to third-party websites. We believe that this additional level of user choice would expand the broad range of search experiences available to users and lead to higher engagement with the Search Choice Screen.

3. Furthermore, if publishers can exercise control over whether they participate in Google Search's generative AI features, there is a strong case for giving consumers an equivalent choice. Offering consumers the ability to tailor their Google Search experience would provide an important signal of actual and evolving consumer preferences to the CMA, would increase engagement with the Search Choice Screen, and could have positive effects on competition in downstream markets.

4. Given how many people use Google Search and how a majority of users are unlikely to change their default search service given how accustomed they are to Google Search, enabling people to tailor their Google Search experience is likely to increase the overall number of users who meaningfully engage with the Search Choice Screen and therefore end up with a search experience that best suits their needs. The potential benefits for consumers and downstream markets are likely to be much larger under this option too (given the tendency for 'traditional' search results to provide more traffic to publishers).

5. It would, in short, enable more users to make more informed and effective choices over their search service, because our assumption is that more users are likely to engage in a choice relating to their experience of a product they are already familiar with and accustomed to using than the number who will opt to set a new default (however, we do believe the proposals set out here will lead to a meaningful increase in the number of people opting to set a new default search service as a result of the more technology-neutral approach to eligibility).

6. We recognise, however, that enabling users to tailor their Google Search experience could reduce the number of users who engage with alternative providers. Some general search services do already offer the opportunity for users to turn off generative AI features, and the Search Choice Screen could provide an important opportunity for these services to sufficiently differentiate themselves from Google Search, acquire new users and expand their presence in the UK search market.

7. We therefore consider that an alternative option could be to amend the CR to require that the Search Choice Screen always include at least one provider that either offers a non-AI search experience or allows users to turn AI features off. Where no such provider has been approved as eligible by Google for legitimate reasons, Google should itself be required to offer users the ability to turn off AI features within Google Search. This may also provide an incentive for Google to run a fair application process.

8. This would present users with a more meaningful choice (by ensuring that users can choose from a range of functionally different services), lead to more engagement with the Search Choice Screen, and all while ensuring that eligible alternative services have an opportunity to differentiate themselves from Google Search and be presented to users. Ensuring that a service that enables users to turn off AI features (or that does not include them at all) is always present on the choice screen will support more competition in search, incentivise investment in services that consumers value, and enable more people to find a search service that better matches their preferences.

9. Given the extent to which Google Search is converting AI Overviews and AI Mode into the default search experience, we believe this proposal is warranted. It would significantly improve the effectiveness of the CR - both by providing more genuine user choice and providing greater scope for alternative search services to compete - and its benefits would justify any cost to Google.

Conclusion

1. Skyscanner broadly supports the revised User Choice CR and welcomes the CMA's efforts to make the framework technology-neutral and responsive to the rapid convergence of traditional search and AI-based services. In finalising the requirement, we encourage the CMA to:

   (a) Ensure that eligibility does not depend on replicating Google's vertically integrated search architecture, either by removing transactional queries as a Criterion 1 use case or by requiring that such queries be answered using multiple sources;

   (b) Retain and strengthen the attribution requirements in paragraph 31, including by moving them into the text of the CR; and

   (c) Reconsider giving consumers the ability to turn off AI features within Google Search, including by ensuring the Search Choice Screen always offers a non-AI option.