

# The Road to Google Everything

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Dominant Search Engine + Discriminatory Penalties + Preferential Placement (Universal Search) = Unassailable Competitive Advantage

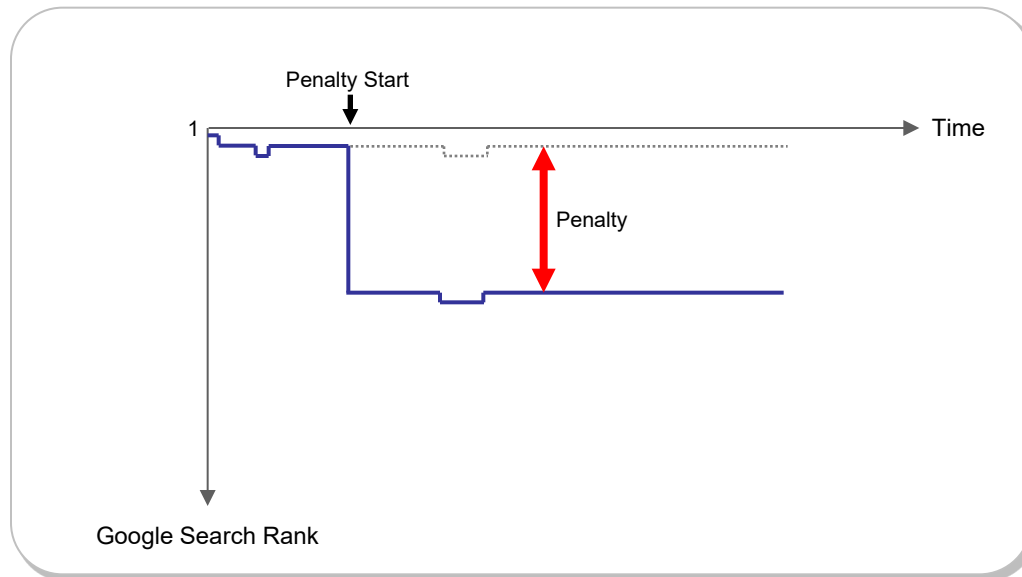
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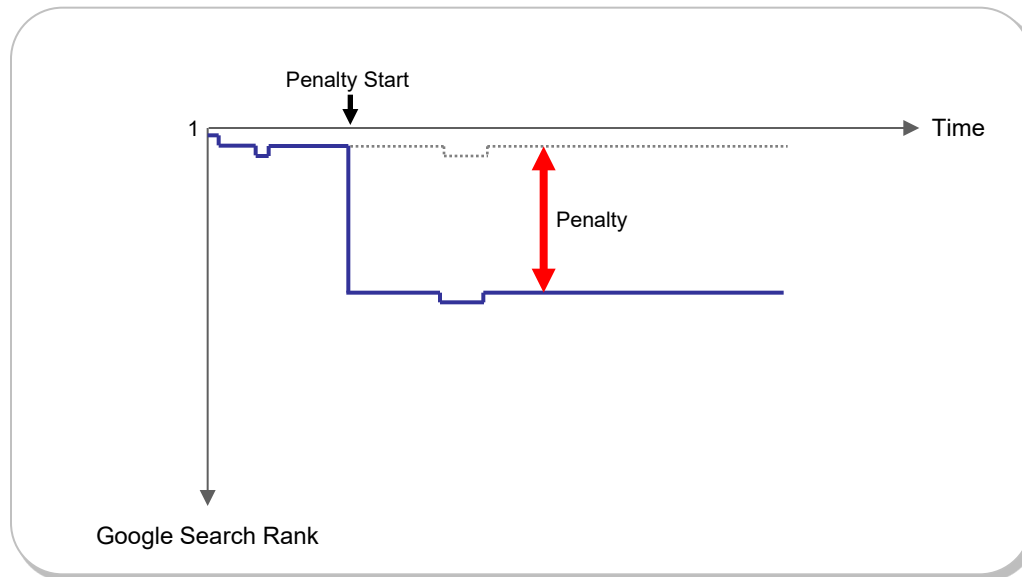
# A Search Penalty in Action

- Google has always used penalties...



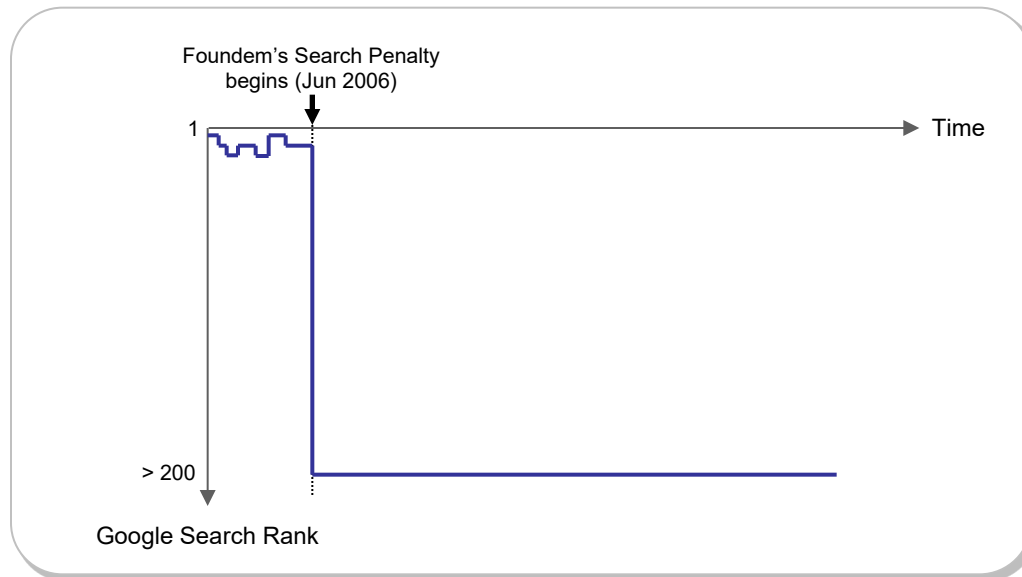
# A Search Penalty in Action

- Google has always used penalties...
- But these used to be reserved for spam, and sites caught cheating Google's algorithms



# A Search Penalty in Action

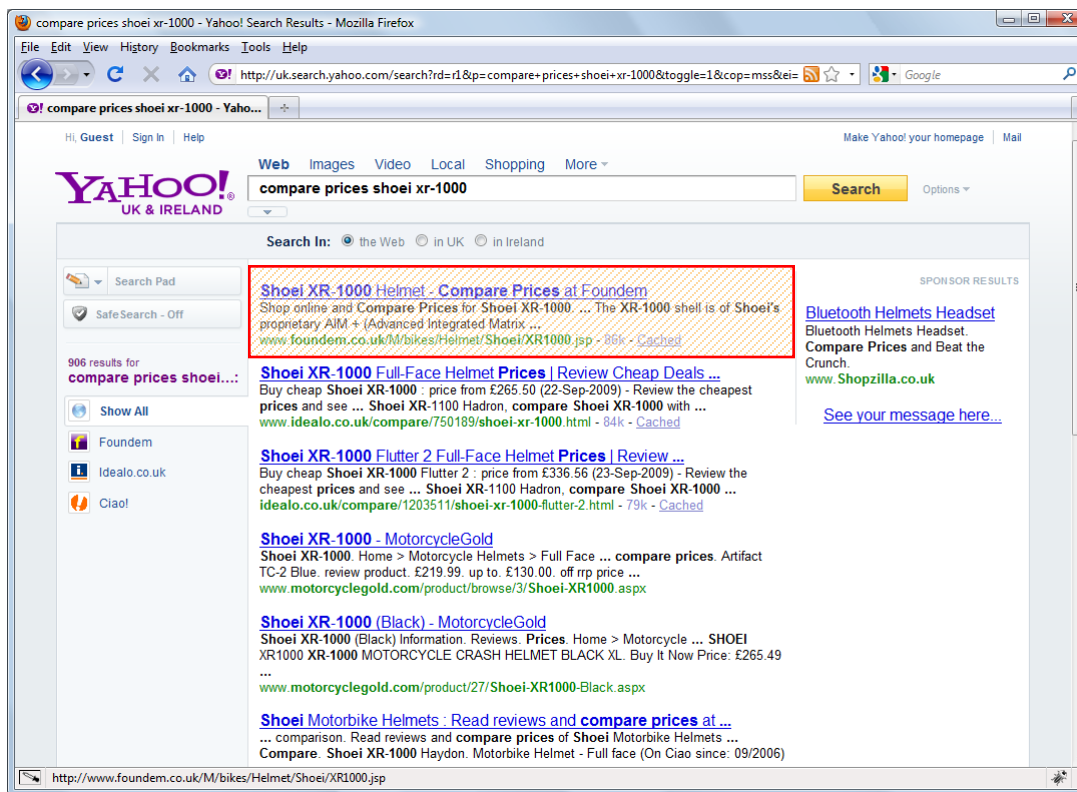
- Since around 2006, Google penalties have been increasingly targeted at perfectly legitimate vertical search and directory services
- On 27<sup>th</sup> of June 2006, Foundem was struck by this new kind of penalty



# A Search Penalty in Action

- Foundem still appeared and ranked normally in Yahoo and Bing, e.g. for keywords “compare prices shoei xr-1000”

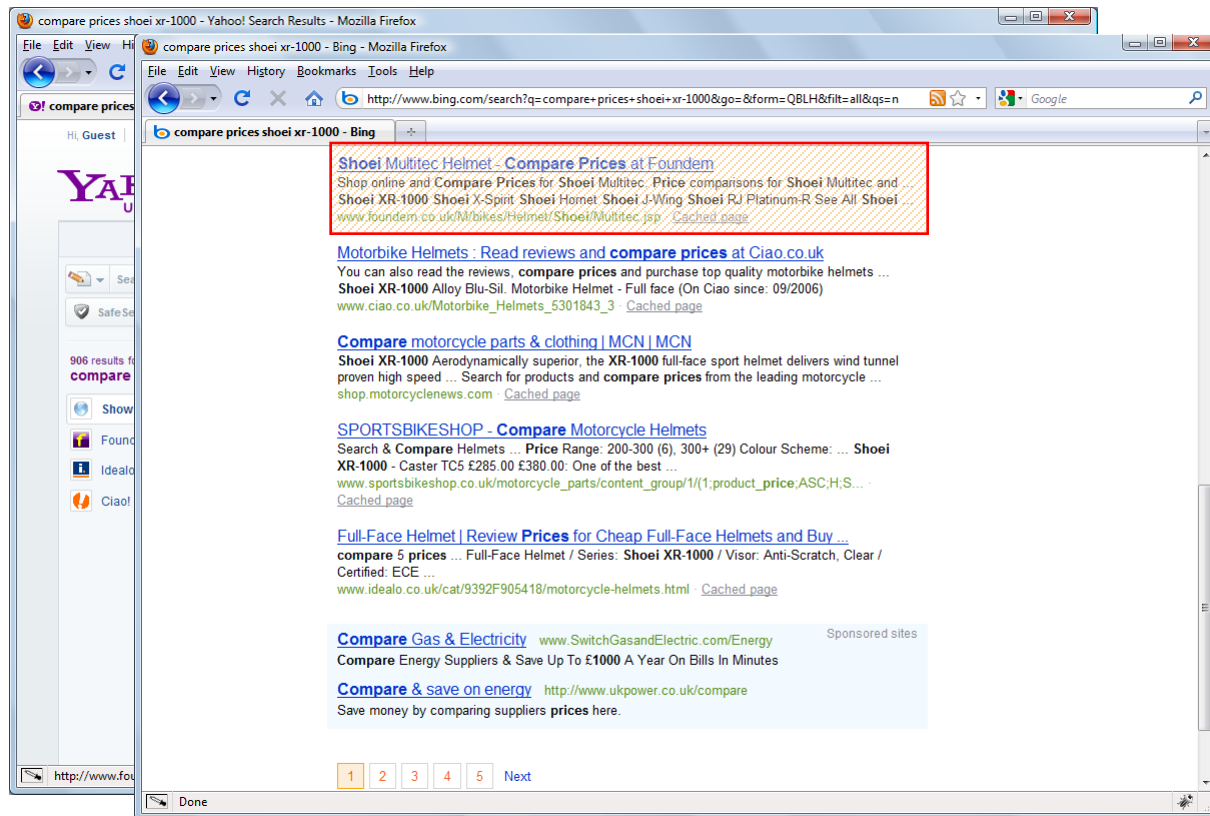
Rank  
Yahoo 1



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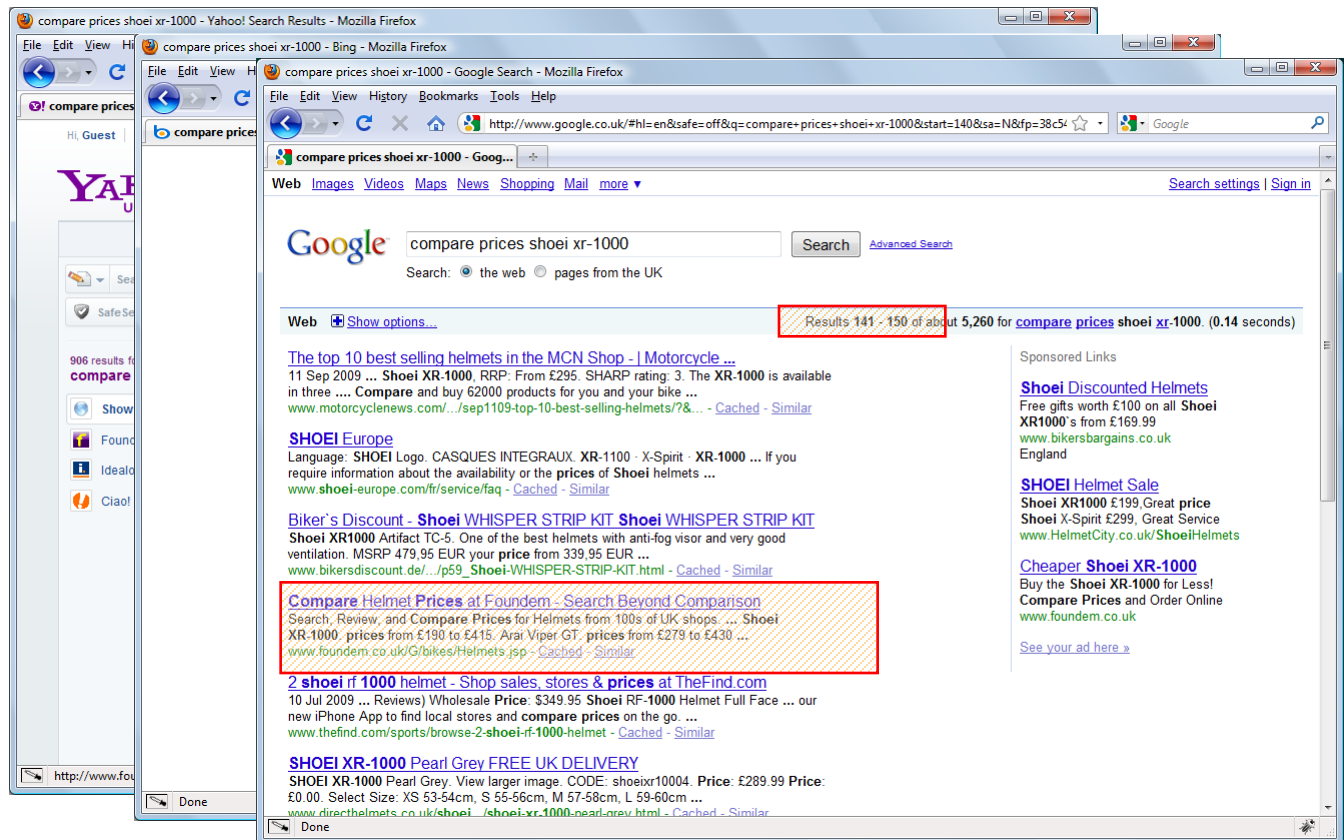
	Rank
Yahoo	1
Bing	7



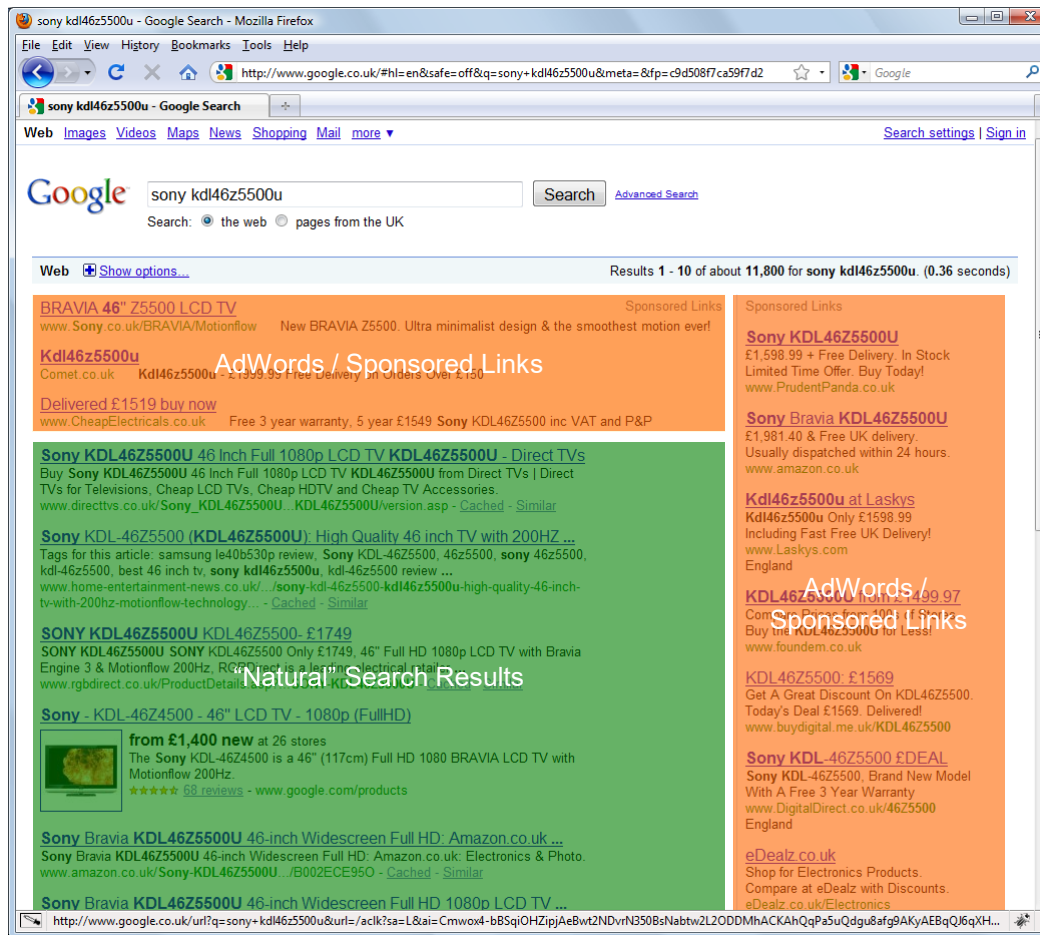
# A Search Penalty in Action

- Foundem still appeared and ranked normally in Yahoo and Bing, e.g. for keywords “compare prices shoei xr-1000”

	Rank
Yahoo	1
Bing	7
Google	145



# An AdWords Penalty in Action



# An AdWords Penalty in Action

The screenshot shows the Google AdWords Campaign Management interface for the ad group "Panasonic TX-L37G10". The interface includes a navigation menu, a list of online campaigns, and a detailed view of the ad group's keywords. The keywords table shows various search terms with their performance metrics, including status, maximum CPC, CTR, average CPC, average position, and quality score. Several keywords are highlighted in red, indicating they are "Below first page bid" or have "Low search volume".

Keyword	Status	Max. CPC	CTR	Avg. CPC	Avg. Pos.	Qual. Score
Panasonic TX-L37G10	Eligible	£0.11	9.53%	£0.10	4.1	10/10
TXL37G10	Eligible	£0.11	6.52%	£0.10	4.4	10/10
Panasonic TX-L37G10	Eligible	£0.11	6.75%	£0.10	5.8	10/10
Panasonic TX-L37G10B	Eligible	£0.11	3.15%	£0.10	4.7	10/10
TXL37G10B	Eligible	£0.11	6.47%	£0.10	4.7	10/10
Panasonic TX-L37G10B	Eligible	£0.11	5.91%	£0.10	5.2	10/10
"Panasonic TX-L37G10 prices"	Below first page bid First page bid estimate: £0.15	£0.11	0.00%	£0.00	10.3	10/10
"Panasonic TX-L37G10 compare"	Low search volume	£0.11	0.00%	£0.00	0	10/10
"Panasonic TX-L37G10 uk"	Eligible	£0.11	0.00%	£0.00	0	10/10
"Panasonic TX-L37G10 price"	Below first page bid First page bid estimate: £0.15	£0.11	0.00%	£0.00	0	10/10
"Panasonic TX-L37G10 cheap"	Low search volume	£0.11	0.00%	£0.00	0	10/10
Panasonic TX-L37G10 compare prices	Low search volume	£0.11	0.00%	£0.00	0	10/10

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The screenshot shows the Google AdWords Campaign Management interface for the ad group "Panasonic TX-L37G10". The interface includes a navigation menu, a left sidebar with a list of campaigns, and a main content area displaying a table of keywords. The table has columns for Keyword, Status, Max. CPC, CTR, Avg. CPC, Avg. Pos., and Qual. Score. A blue box highlights the 'Qual. Score' column, showing a score of 10/10 for most keywords, but a score of 0 for several keywords with 'Below first page bid' or 'Low search volume' status.

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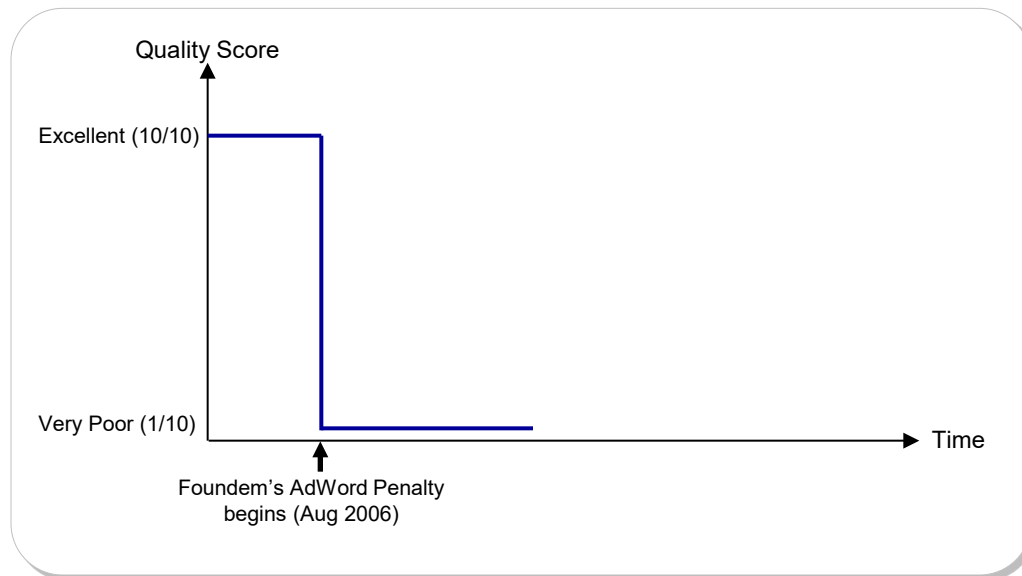
# An AdWords Penalty in Action

The screenshot shows the Google AdWords interface for the Panasonic TX-L37G10 ad group. The 'Keywords' tab is active, displaying a list of keywords with their performance metrics. The 'Qual. Score' column is highlighted in red, indicating a significant drop in quality scores for several keywords, which is a sign of a penalty.

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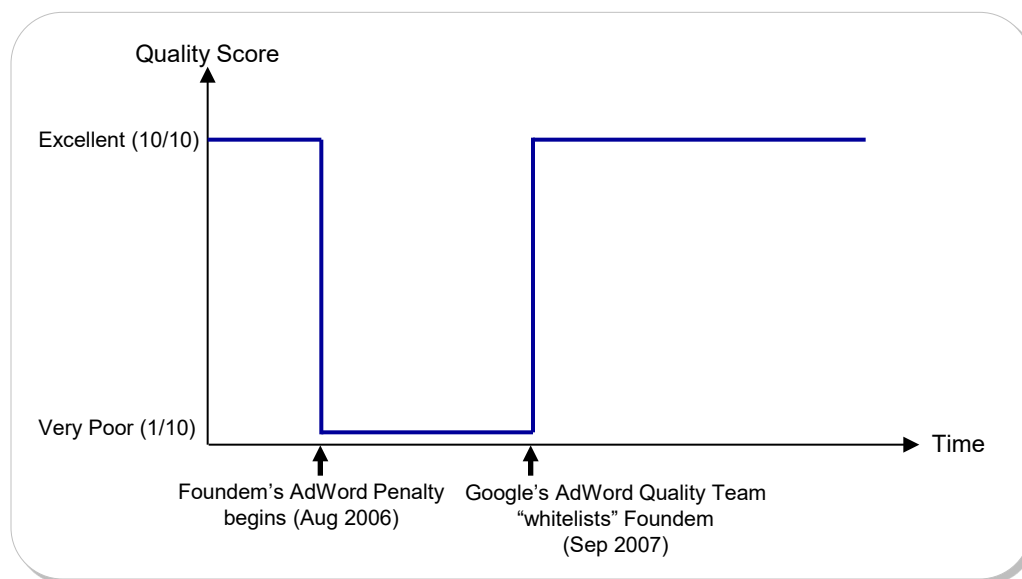
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- Google eventually explained that Foundem's Quality Scores had been automatically downgraded by a new algorithm designed to detect and **penalise** certain kinds of site, including **vertical search** services such as price comparison and travel search



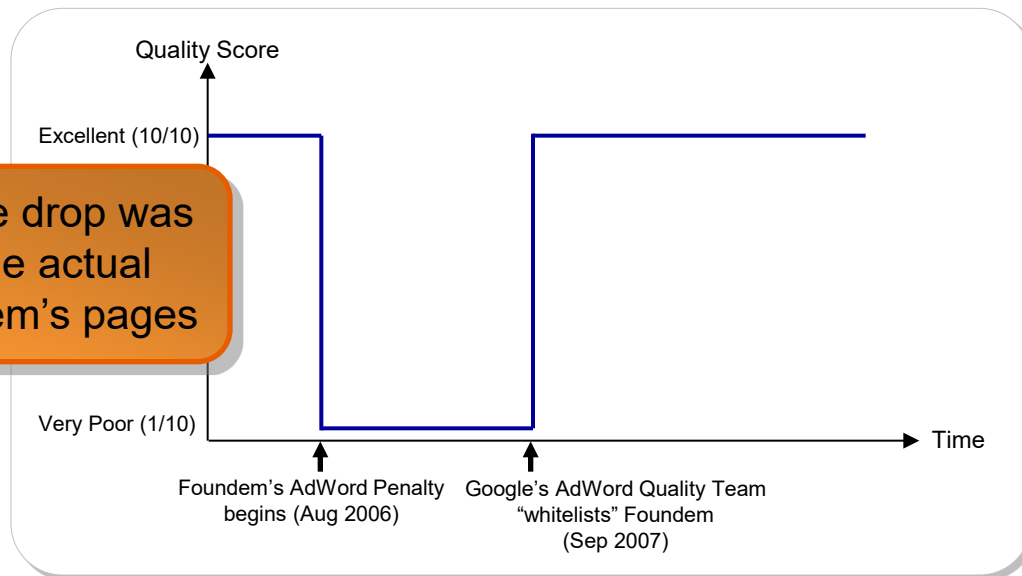
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- Google granted Foundem immunity from this AdWord penalty by **manually "whitelisting"** the site names foundem.com and foundem.co.uk



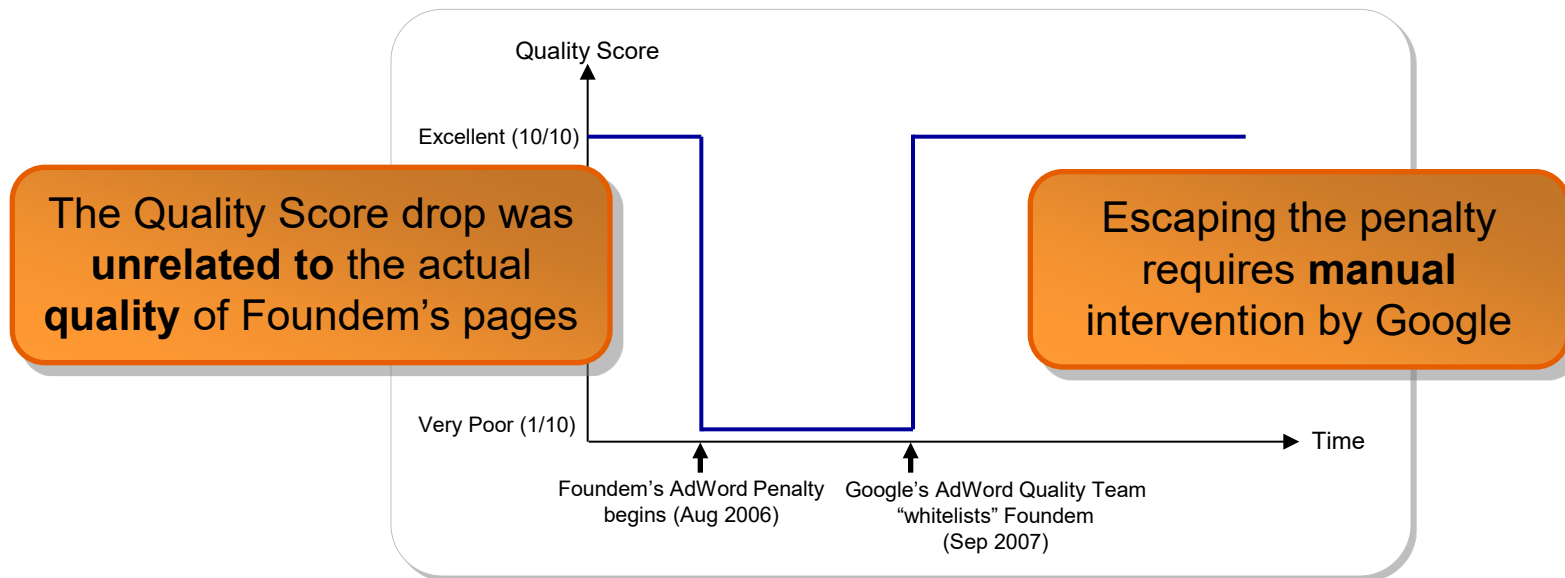
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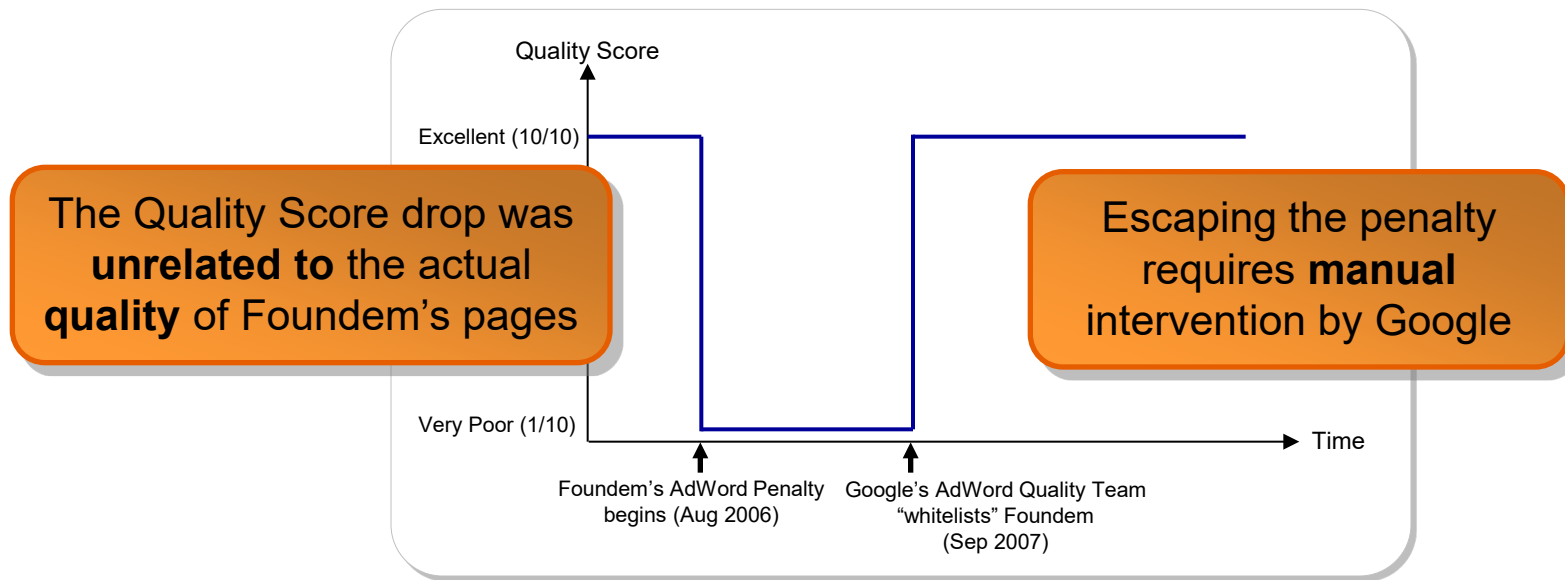
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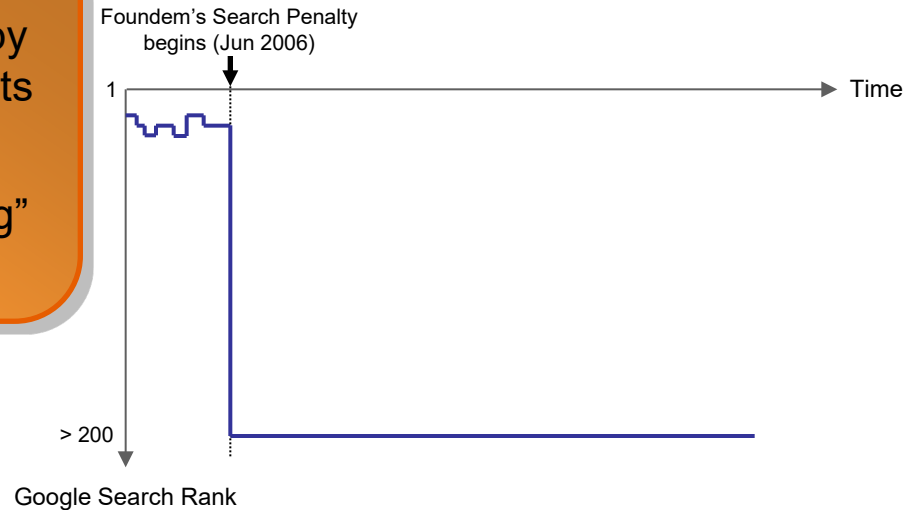
"Google told me that it **never made judgments** of what was 'good' and 'bad' because it was **all in the hands of the algorithm**", *Joe Nocera, Stuck in Google's Doghouse, NYT, 12 Sep 2008*

# A Search Penalty in Action

Generic phrase, e.g. "price comparison"

Foundem's Search penalty was triggered by the same algorithm as its AdWords penalty

So, manual "whitelisting" was the only way out

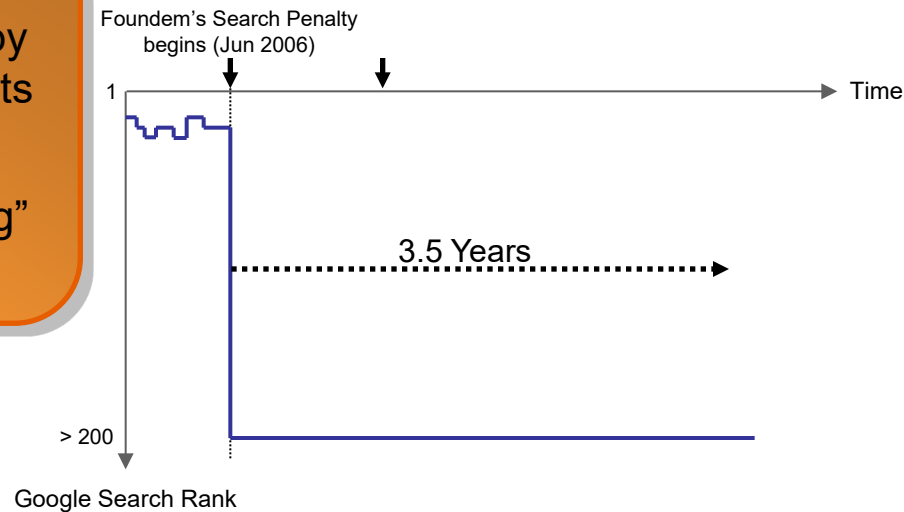


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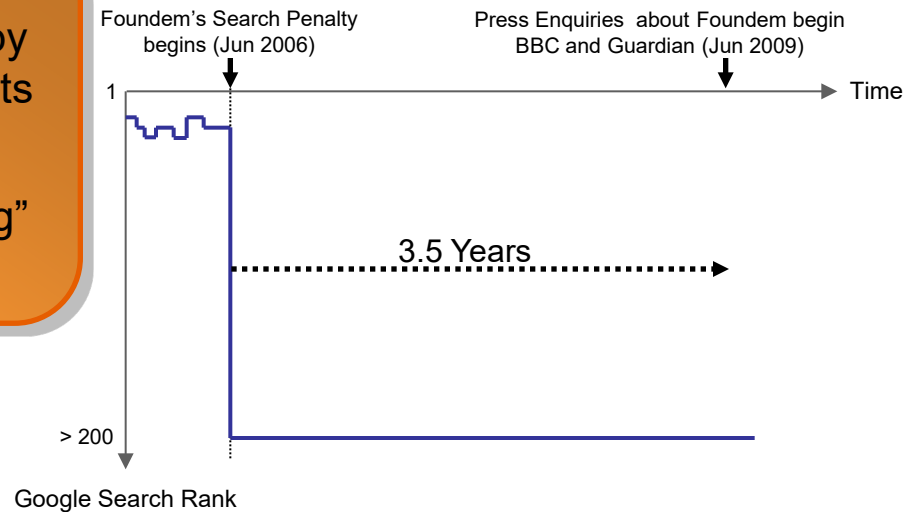


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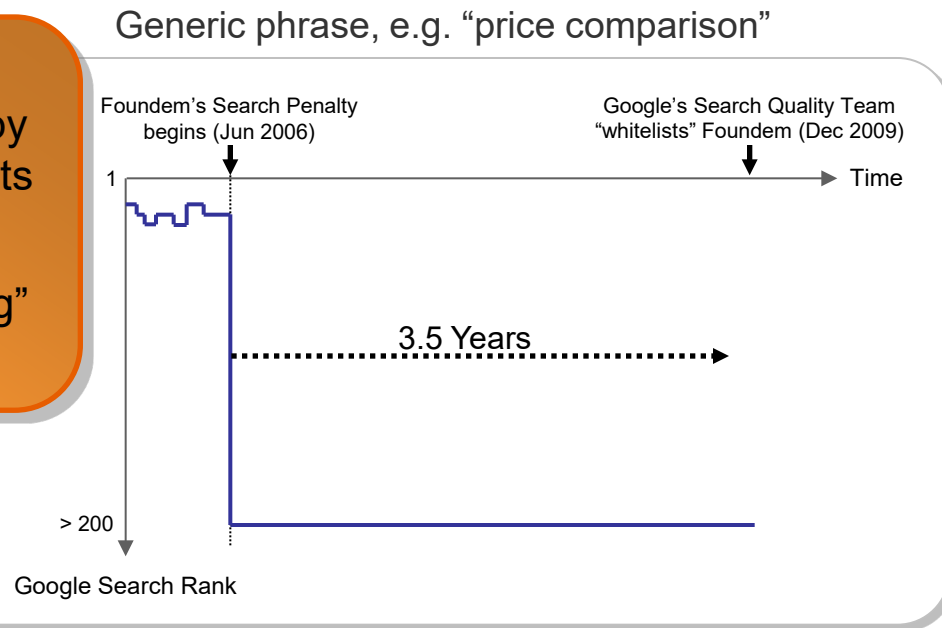
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# Universal Search in Action

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[Zanussi ZWF16581W Washing Machine, White](#)  
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[Zanussi ZWF16581W](#)  
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# Universal Search in Action

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**ZWF16581W** Washing Machine: £399.97  
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# Universal Search in Action

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nokia 5800 - Google Search

Google nokia 5800 Search Advanced Search

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**Shopping results for nokia 5800**


 [Nokia 5800 Xpress Music Sim Free / Unlocked 3.1 Megapixel Mobile ...](#)  
 £199.99 new - [Play.com](#)  
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 £169.99 new - [Tesco.com](#)  
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**News results for nokia 5800**

 [Nokia to launch 5800 successor on the 26th?](#) - 6 hours ago  
 Rumours are currently circulating that Nokia is set to launch a new handset in the 26th January, the anniversary of the Nokia 5800. With that in mind, ...  
[The Link Experts - 35 related articles >](#)  
[See Alexandra Burke live + win a Nokia 5800 - The Sun](#)

**Video results for nokia 5800**

 [Nokia 5800](#)  
 2 min 44 sec - 2 Oct 2008  
[www.youtube.com](http://www.youtube.com)

 [Nokia 5800 XpressMusic Demo](#)  
 2 min 6 sec - 2 Oct 2008  
[www.youtube.com](http://www.youtube.com)

**Nokia 5800 XpressMusic - Pay monthly - The Carphone Warehouse**  
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**Nokia 5800 on O2™**  
 The Nokia 5800 free on selected monthly tariffs on O2™ Shop.  
[shop.O2.co.uk/Nokia5800](http://shop.O2.co.uk/Nokia5800)

**Nokia 5800 Deals On 3™**  
 Get The New Nokia 5800 With A 3.2 Mega Pixel Camera & Touch Screen  
[www.three.co.uk/3store](http://www.three.co.uk/3store)

**Nokia 5800 XpressMusic**  
 3.2" High-Definition Touchscreen. Buy Direct At Official Nokia Shop!  
[nokia.co.uk/shop](http://nokia.co.uk/shop)

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 Save up to £5 per month online with your Orange Nokia 5800  
[www.orange.co.uk/Nokia](http://www.orange.co.uk/Nokia)  
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**Nokia 5800 - UK Offers**  
 Compare Nokia 5800 Mobile Deals. Nokia 5800 UK Deal Comparison!  
[www.omio.com/Nokia-5800-XpressMusic](http://www.omio.com/Nokia-5800-XpressMusic)

**Nokia 5800 Apps Store**  
 Download Nokia Apps For Free! Just Register At With The Ovi Store  
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**Cheapest 5800 Deals**  
 Compare 5800 Deals Online. Top10 Deals From £14.99.  
[Nokia-5800-Deals.Top10.co.uk](http://Nokia-5800-Deals.Top10.co.uk)

Done

# Universal Search in Action

nokia 5800 - Google Search - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://www.google.co.uk/search?hl=en&q=nokia+5800&meta=&aq=1

nokia 5800 - Google Search

Google nokia 5800 Search Advanced Search

Search:  the web  pages from the UK


Web [Show options...](#) Results 1 - 10 of about 21,000,000 for nokia 5800. (0.15 seconds)

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[www.orange.co.uk/Nokia](http://www.orange.co.uk/Nokia)  
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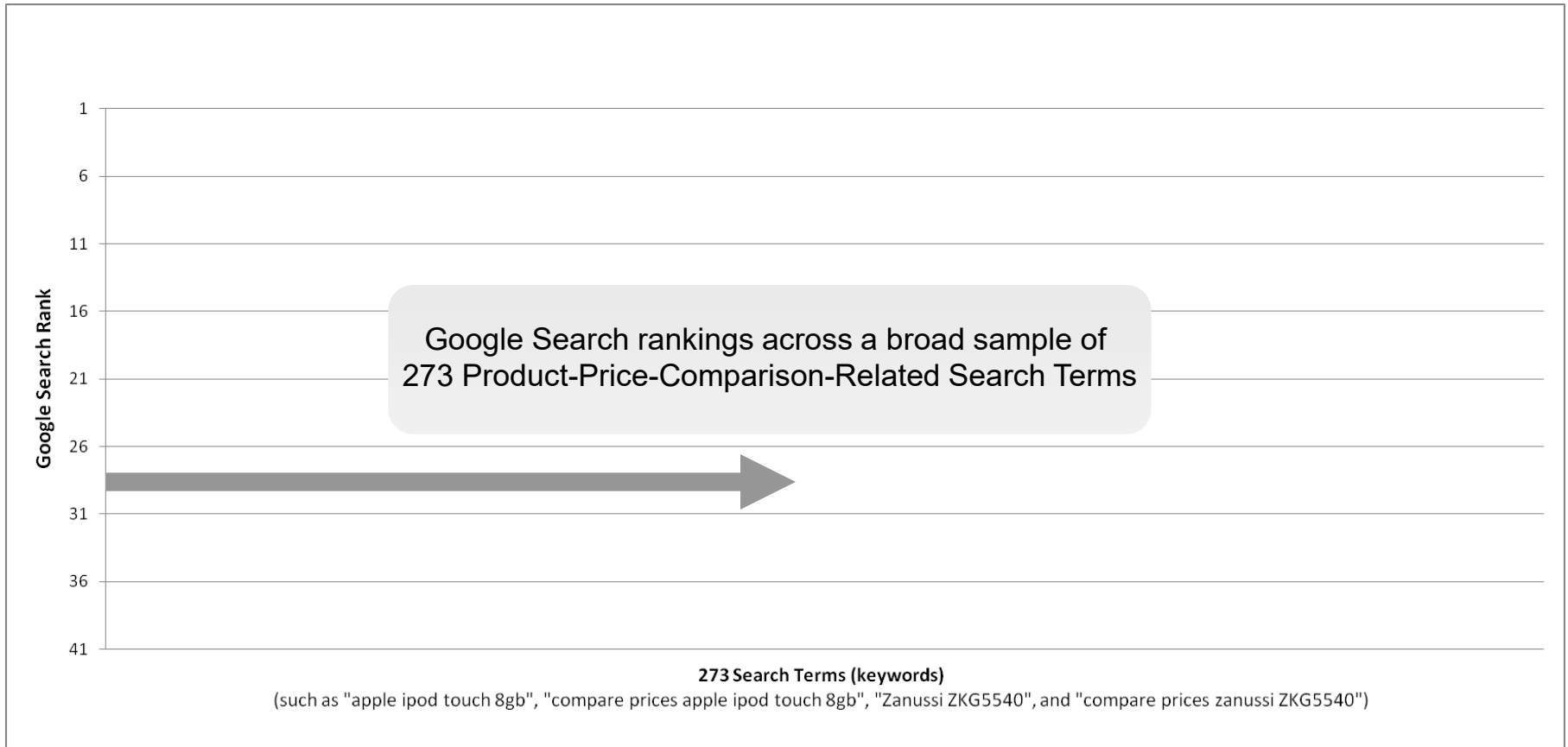
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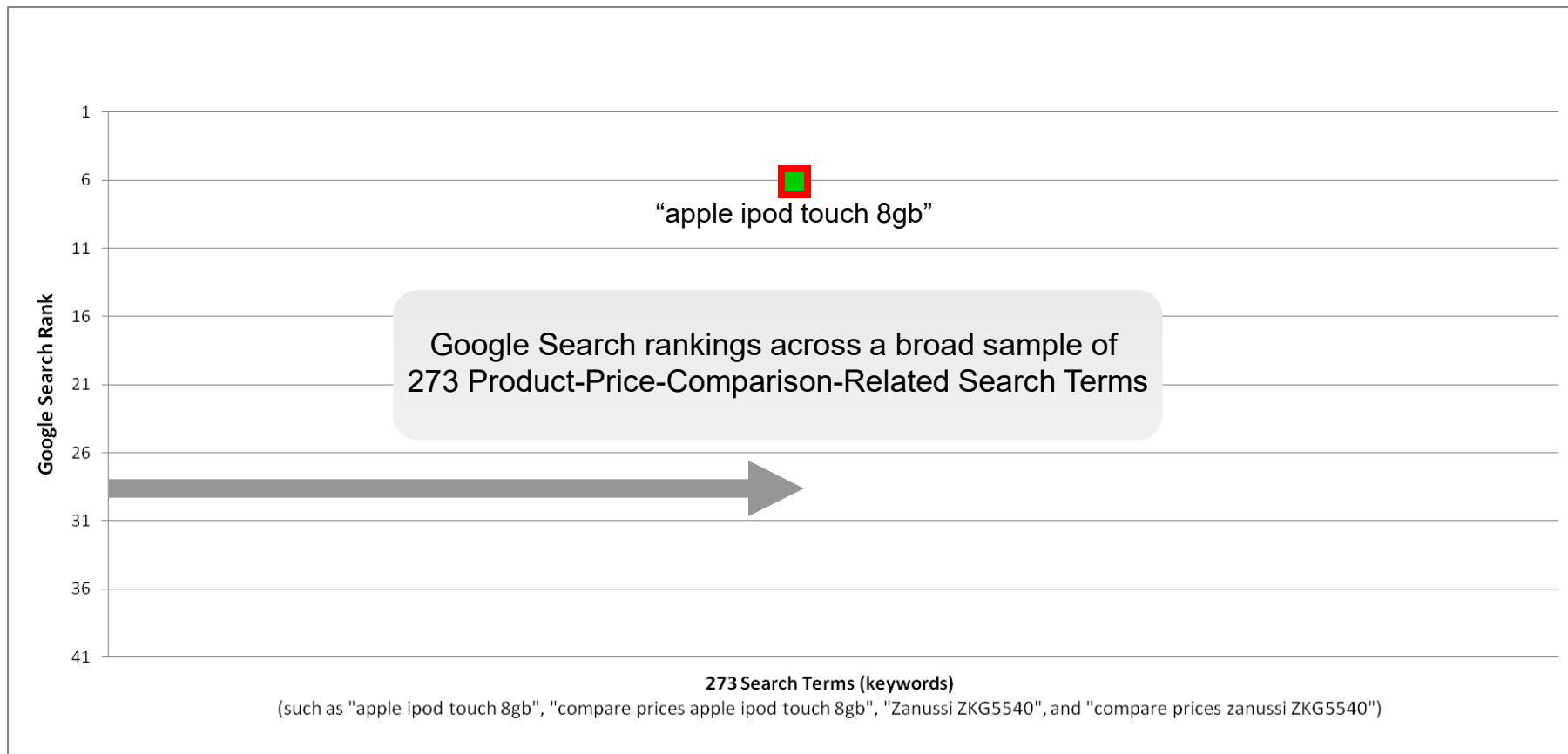
Done

## Example 2: Google Product Search (Froogle) vs. All Price Comparison Sites



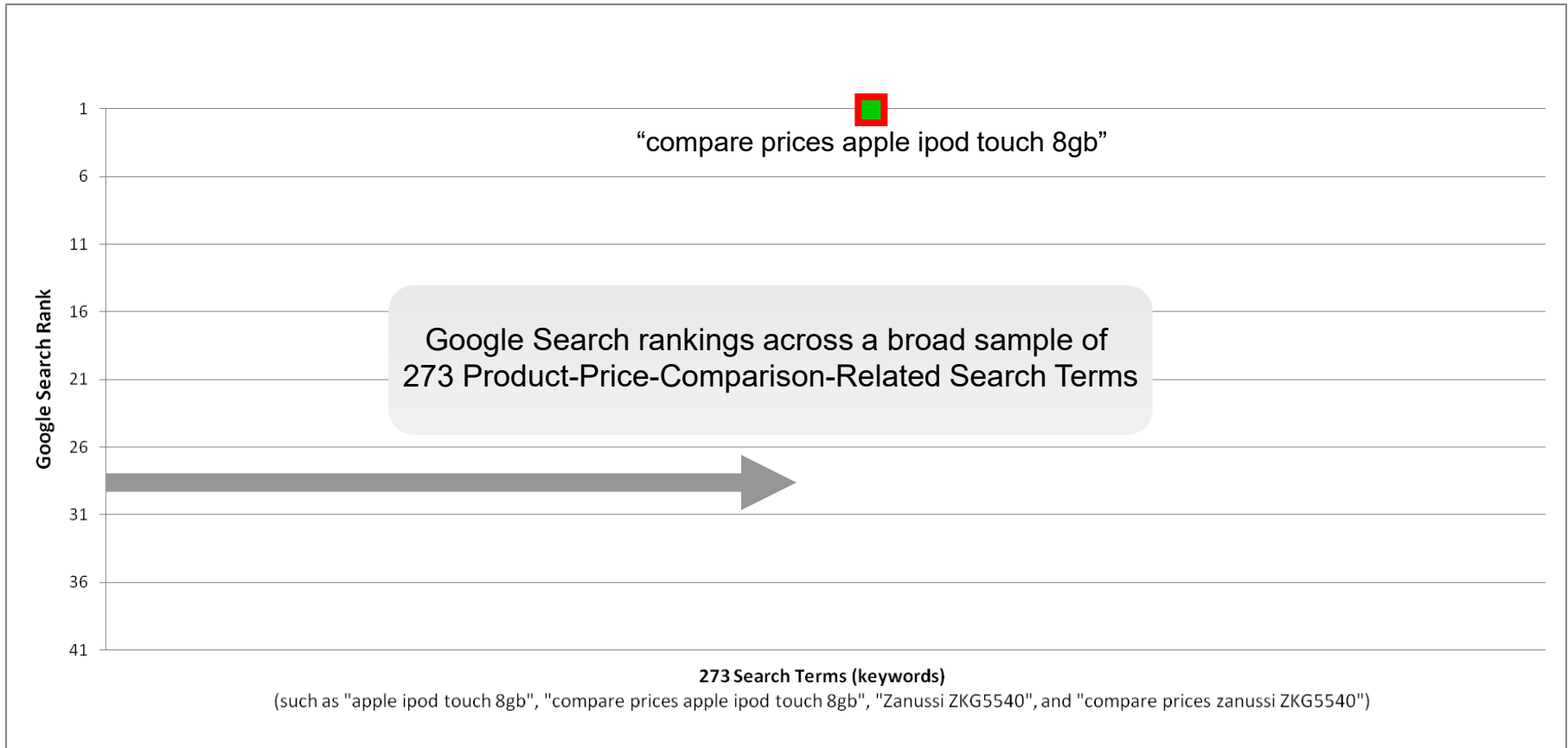
Data Collated 29 January 2010

## Example 2: Google Product Search (Froogle) vs. All Price Comparison Sites

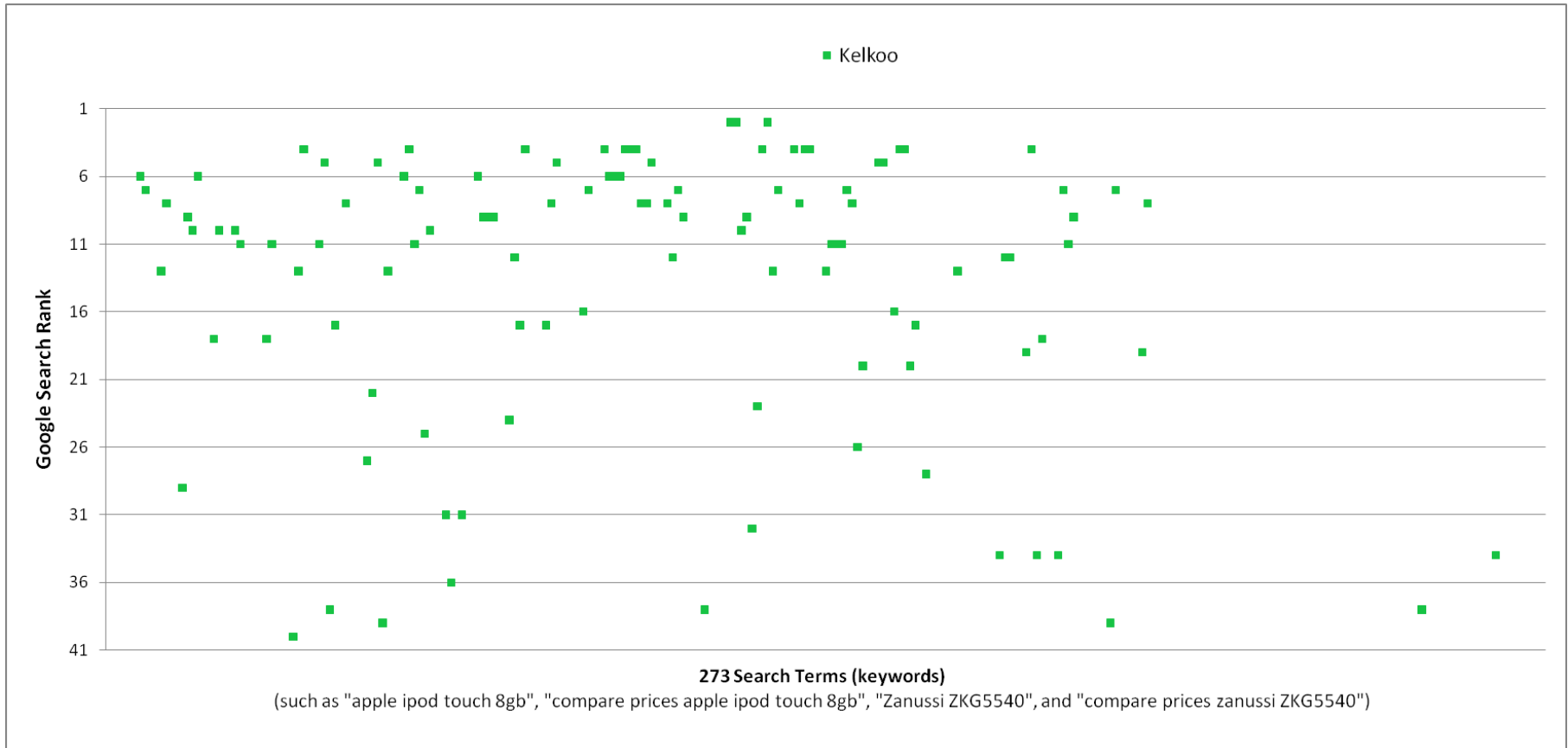


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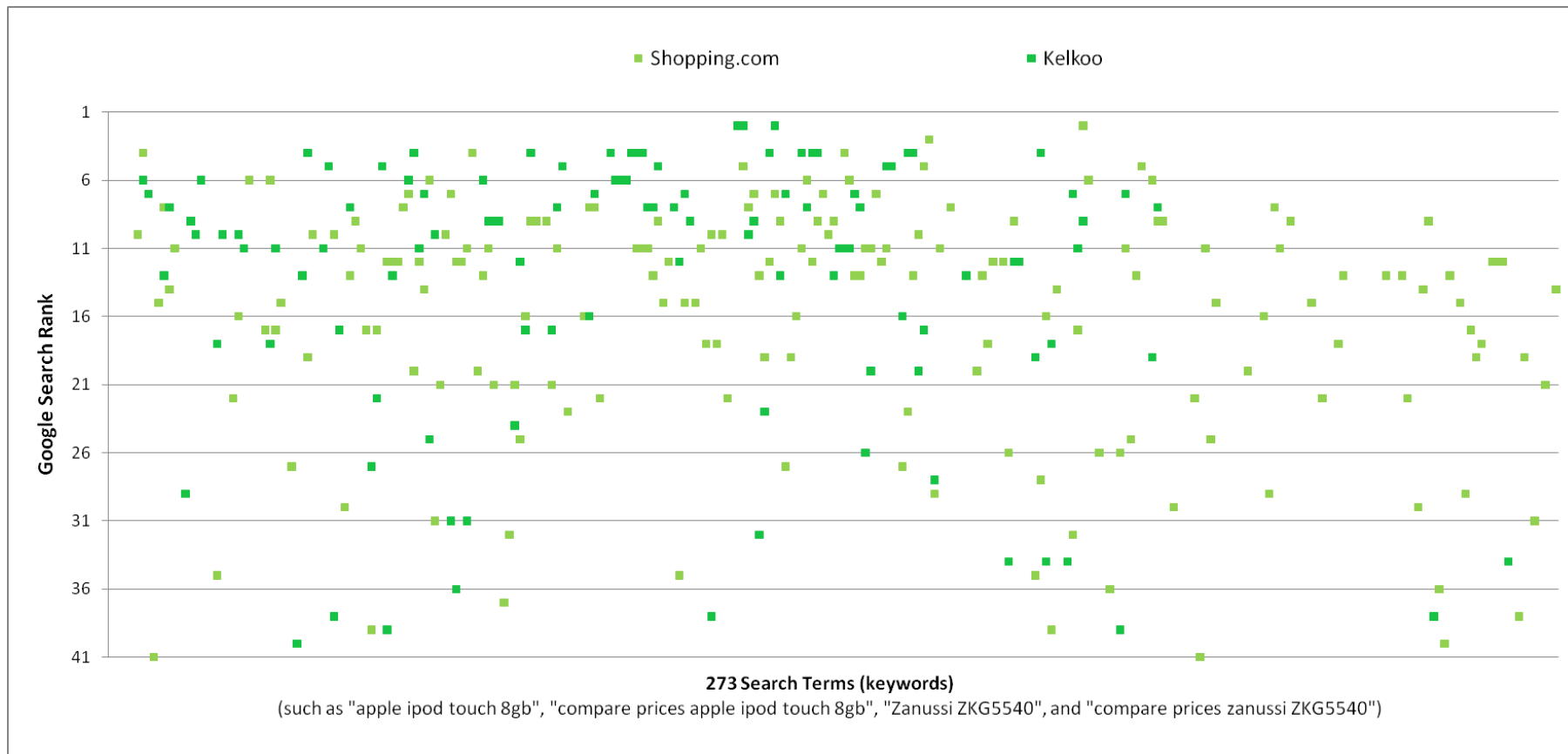


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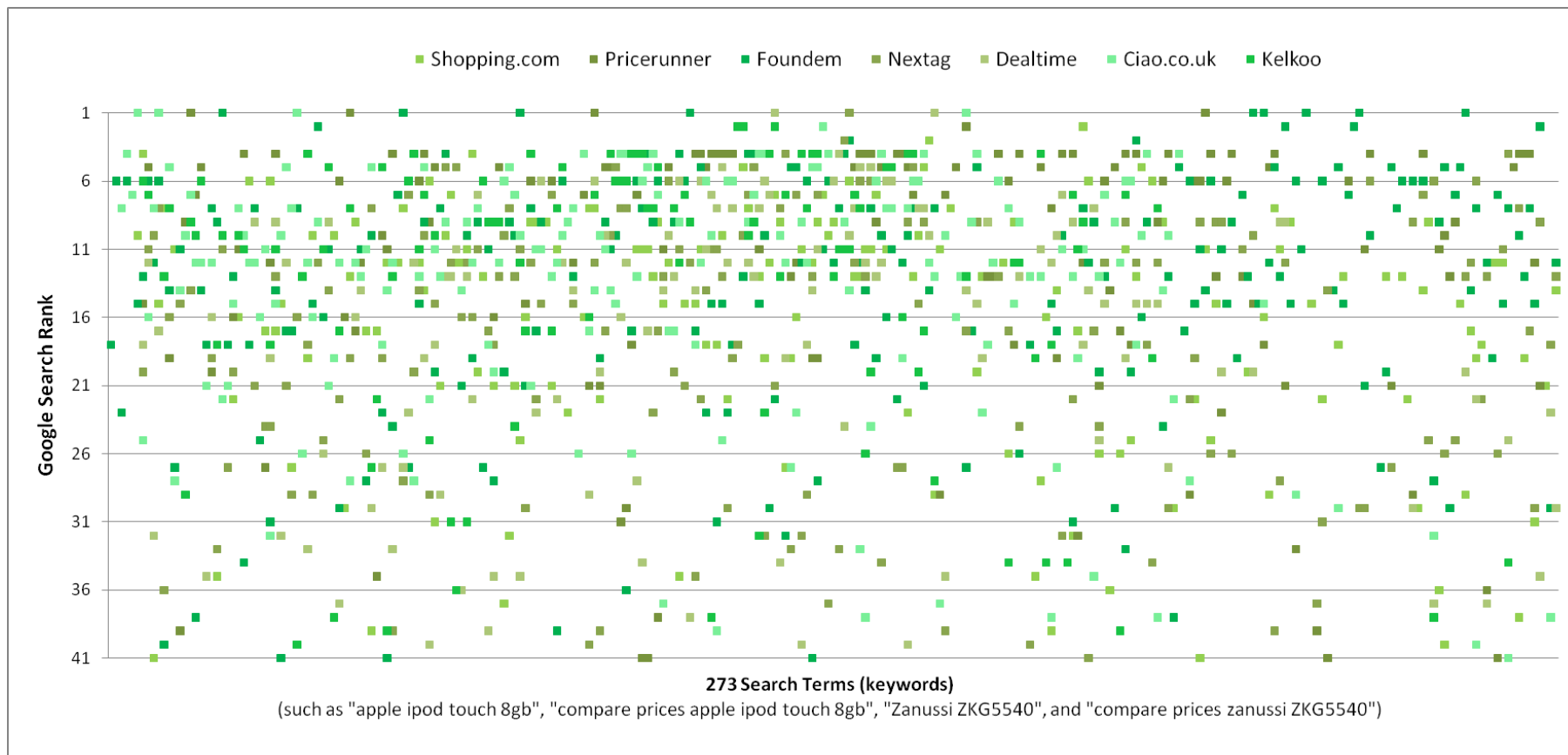
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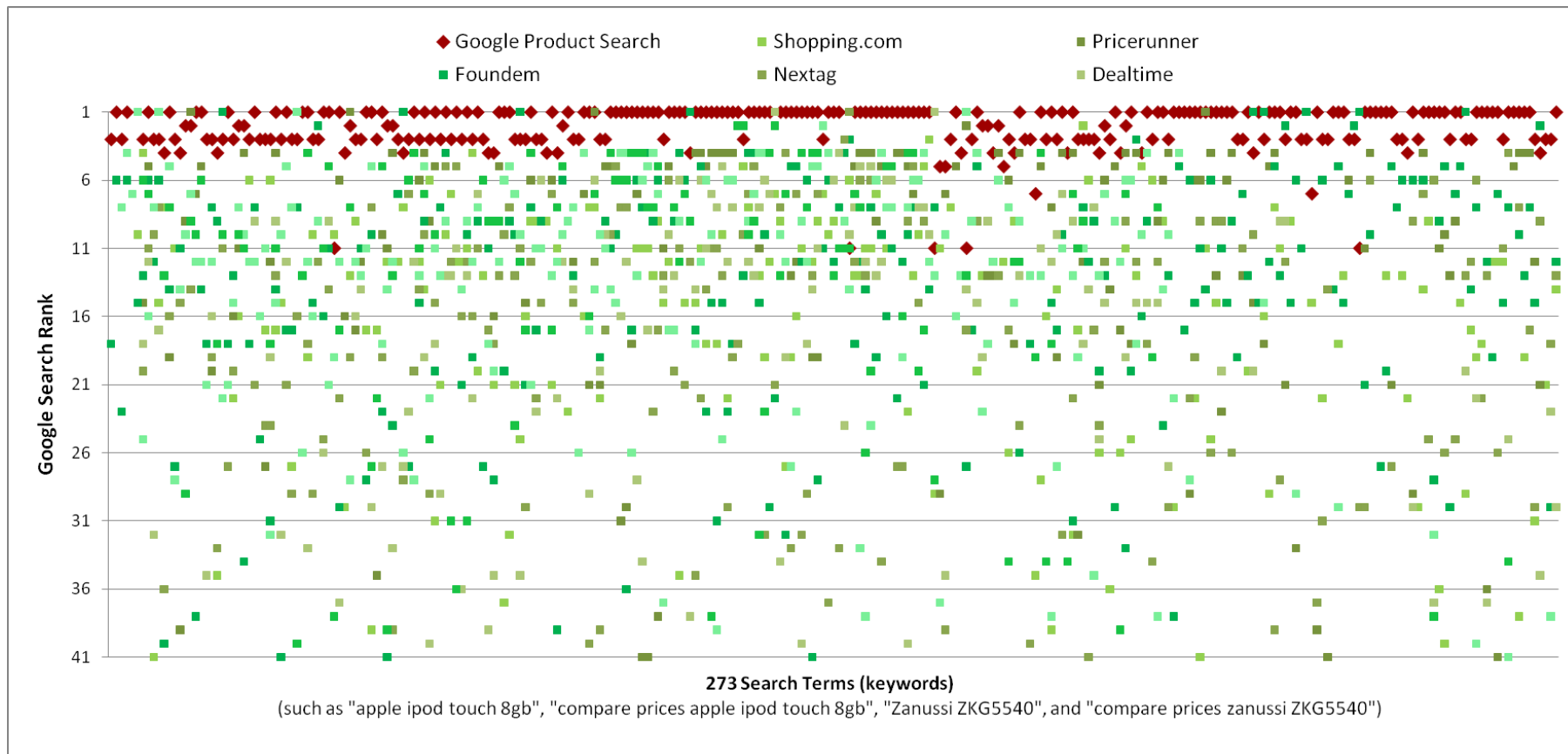
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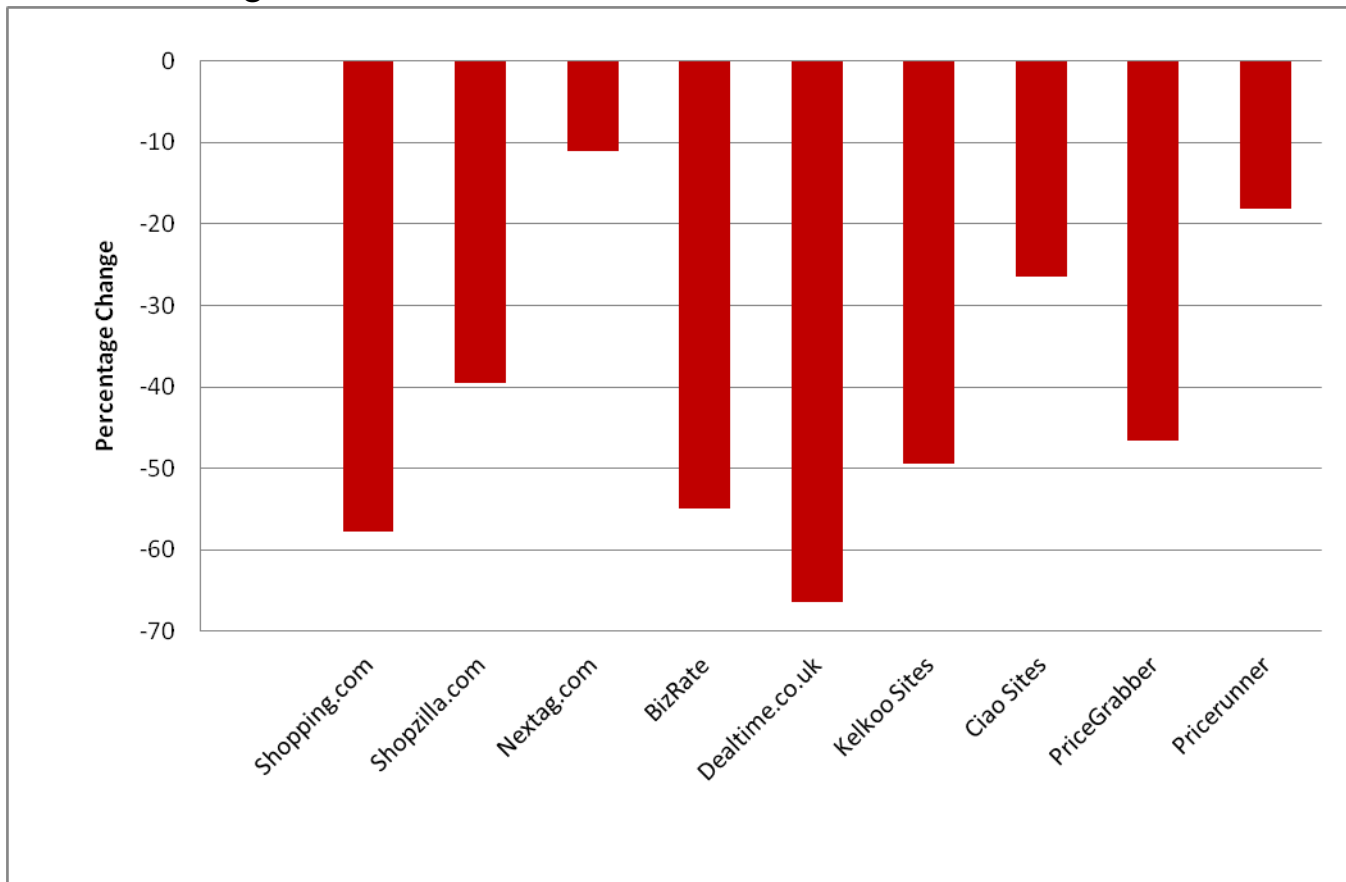
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# Effect on Traffic to UK Competitors

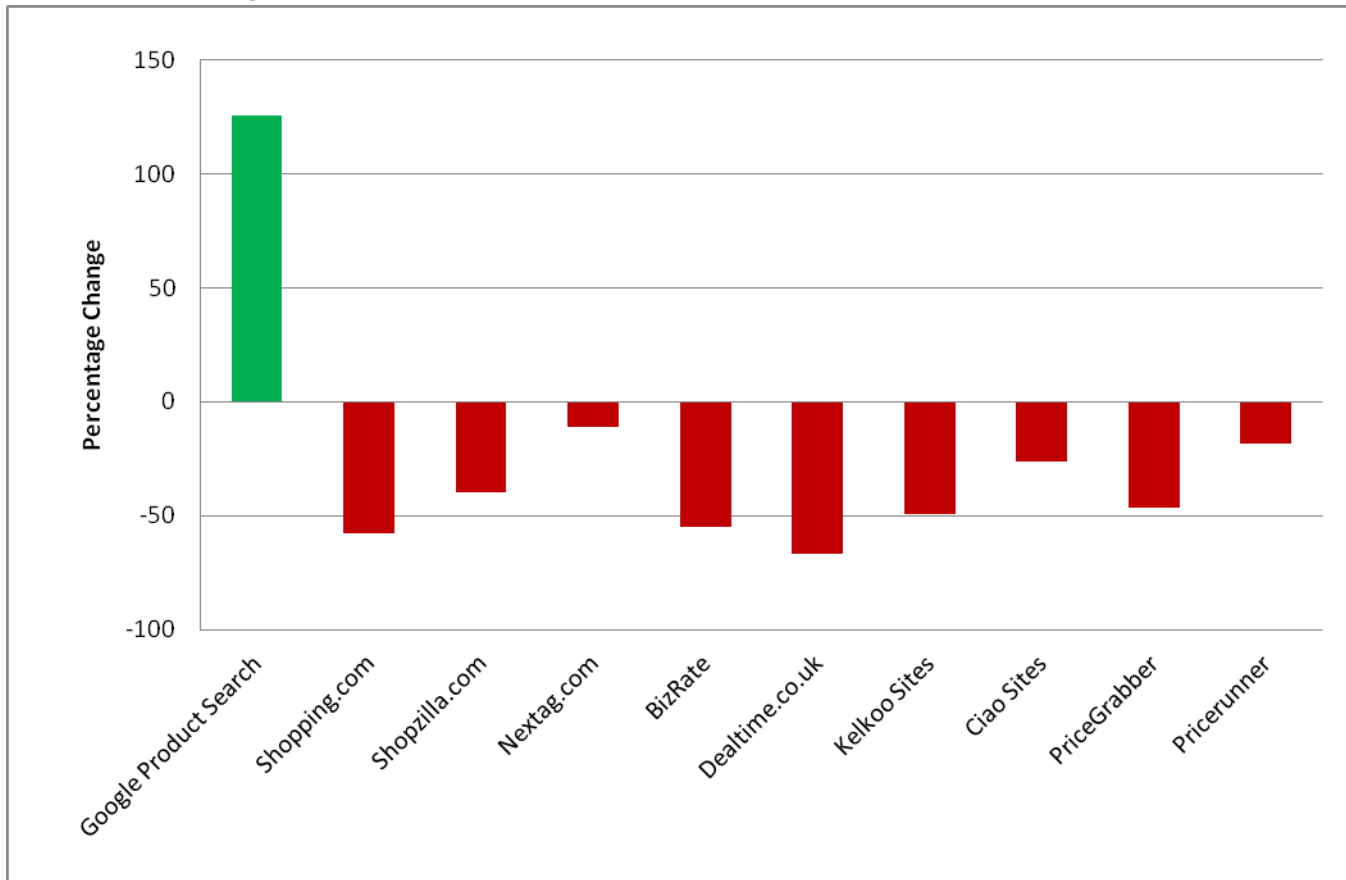
% Change in Visitor Numbers Between Oct 2007 and Oct 2009



Data from comScore

# Effect on Traffic to UK Competitors

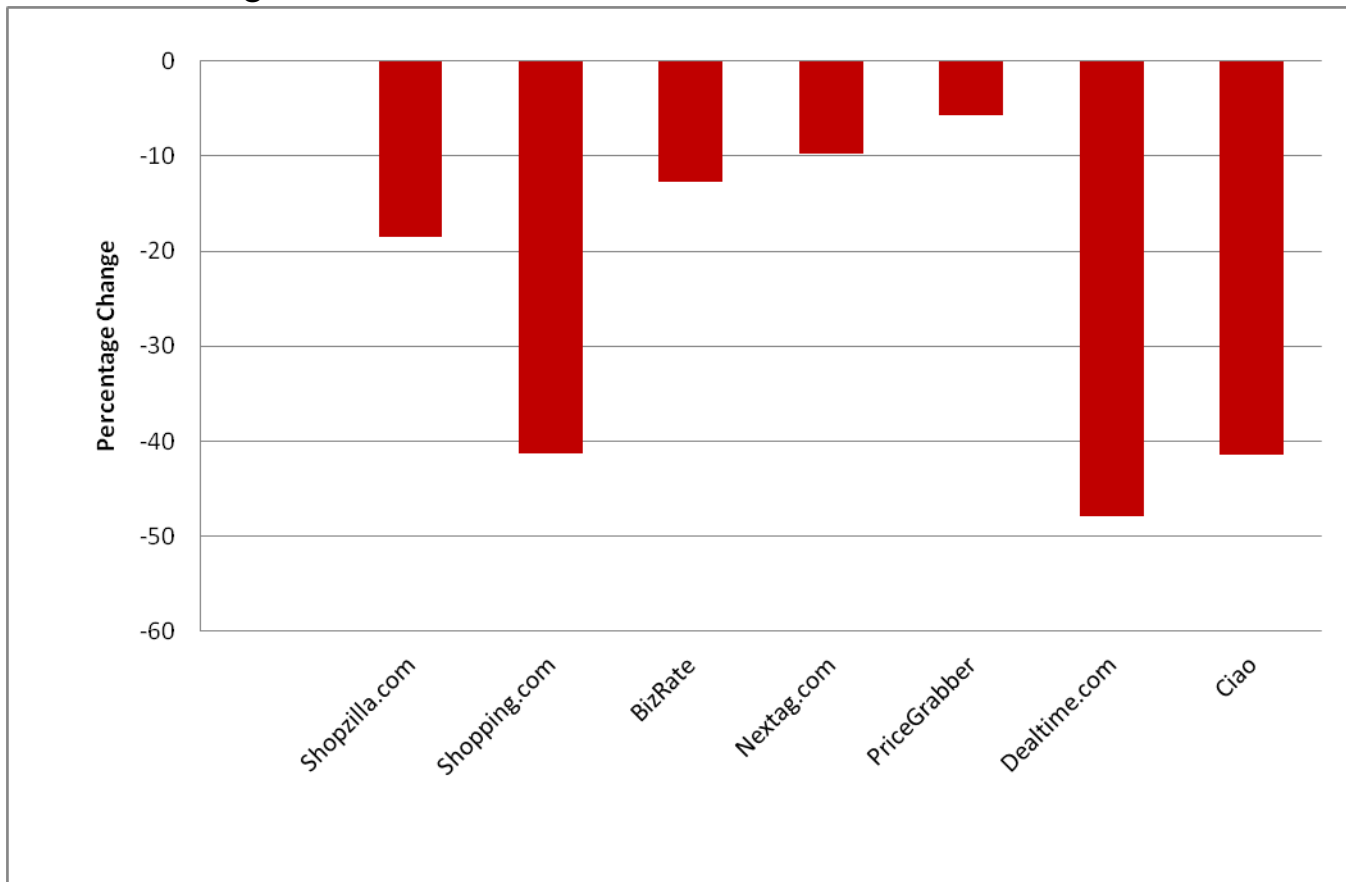
% Change in Visitor Numbers Between Oct 2007 and Oct 2009



Data from comScore

# Effect on Traffic to US Competitors

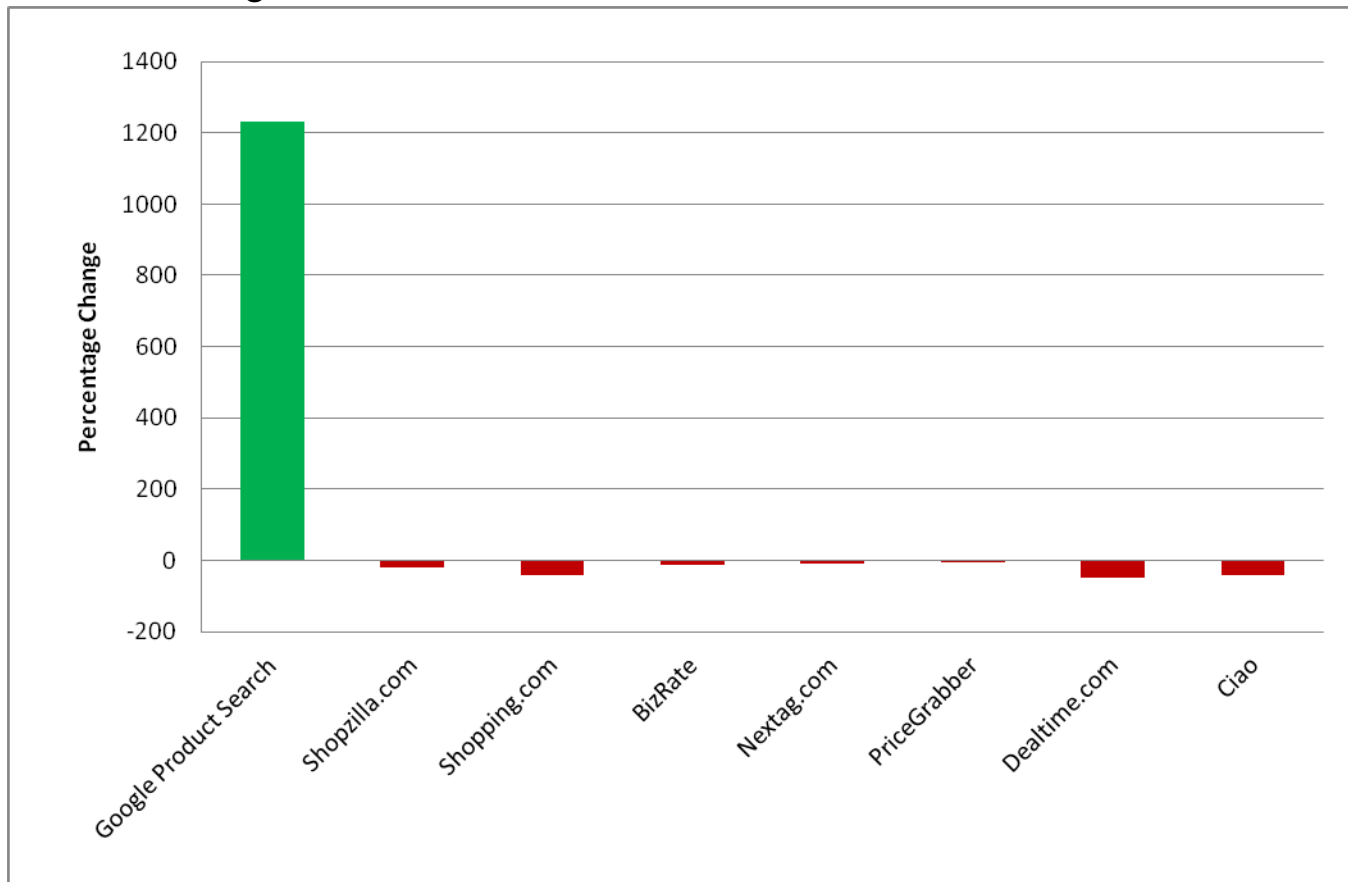
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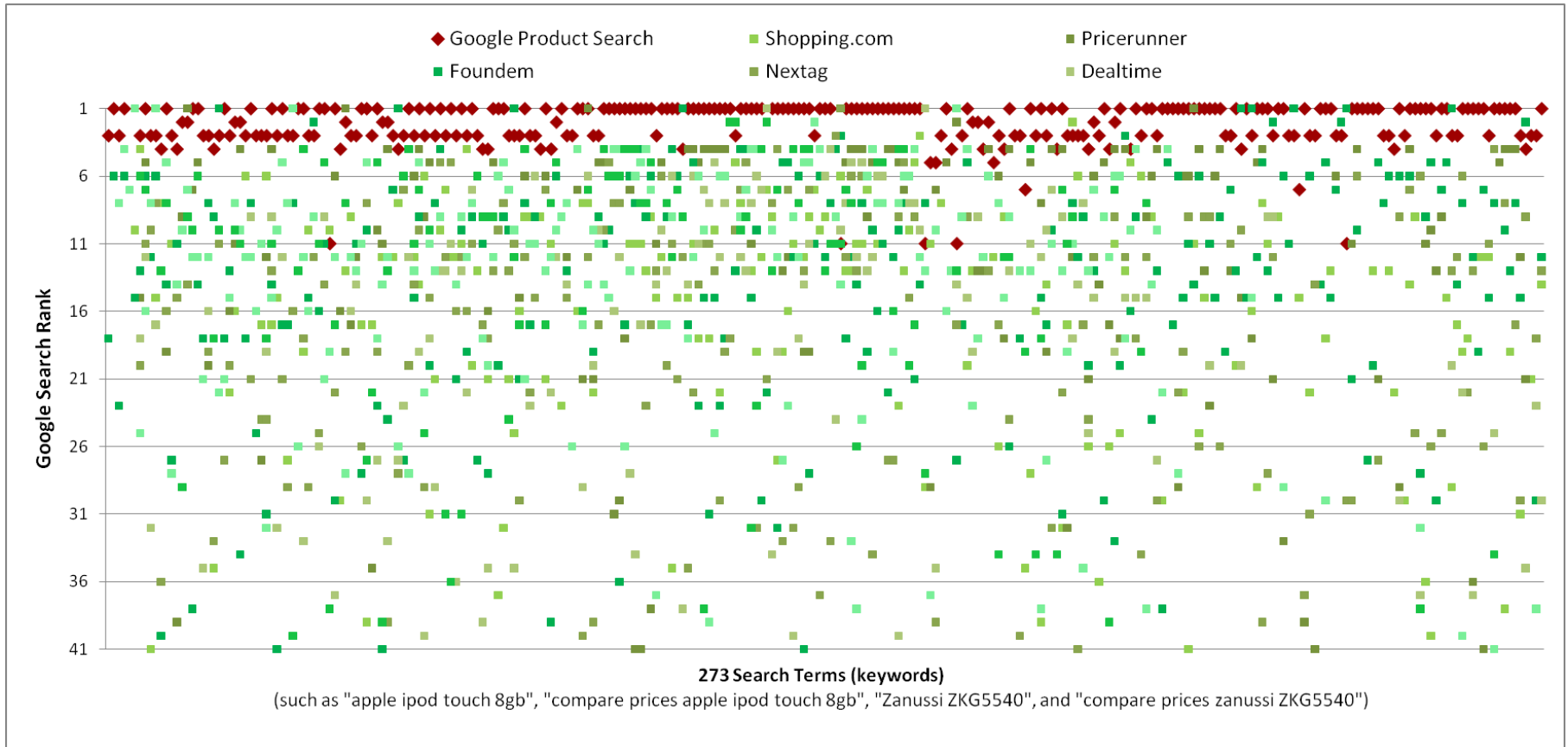
# Effect on Traffic to US Competitors

% Change in Visitor Numbers Between Oct 2007 and Oct 2009



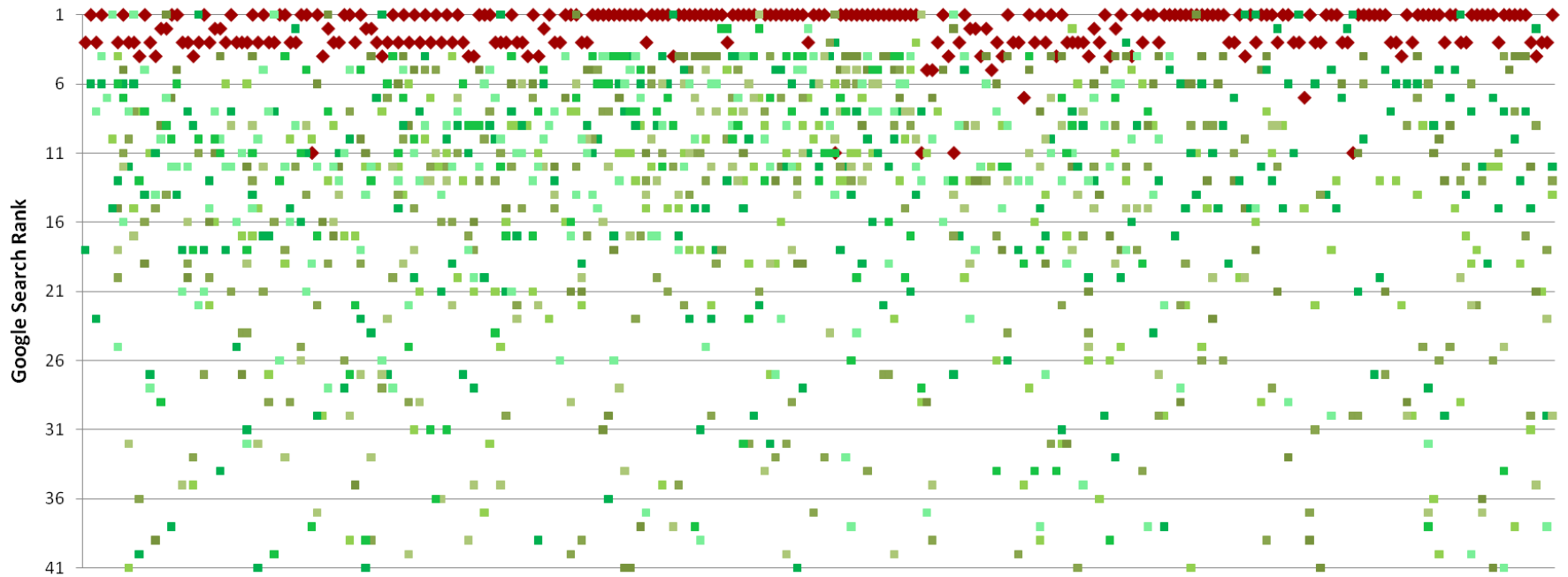
Data from comScore

# Internet Neutrality = Net Neutrality + Search Neutrality



# Internet Neutrality = Net Neutrality + Search Neutrality

These could be pretty much any companies in any sector...  
it's up to Google



# The Need for Search Neutrality

## Google Say

Fundamentally, **net neutrality** is about equal access to the Internet. In our view, **the broadband carriers** should not be permitted to use their market power to discriminate against competing applications or content. Just as telephone companies are not permitted to tell consumers who they can call or what they can say, **broadband carriers** should not be allowed to use their market power to control activity online.

Allowing **broadband carriers** to control what people see and do online **would** fundamentally **undermine** the principles that have made the Internet such a success...A number of justifications have been created to support **carrier** control over consumer choices online; none stand up to scrutiny.

Innovation has thrived online because the Internet's architecture enables any and all users to generate new ideas and technologies, which are allowed to succeed based on their own merits and benefits. **Some major broadband service providers have threatened** to act as a gatekeeper, playing favorites with particular applications or content providers...It's no stretch to say that such discriminatory practices could have prevented Google from getting off the ground — and they could prevent the next Google from ever coming to be.

## We Say

Fundamentally, **search neutrality** is about equal access to the Internet. In our view, **search engines** should not be permitted to use their market power to discriminate against competing applications or content. Just as telephone companies are not permitted to tell consumers who they can call or what they can say, **search engines** should not be allowed to use their market power to control activity online.

Allowing **a search engine** to control what people see and do online **is** fundamentally **undermining** the principles that have made the Internet such a success...A number of justifications have been created to support **search engine** control over consumer choices online; none stand up to scrutiny.

Innovation has thrived online because the Internet's architecture enables any and all users to generate new ideas and technologies, which are allowed to succeed based on their own merits and benefits. **Google has now started** to act as a gatekeeper, playing favorites with particular applications and content providers...It's no stretch to say that such discriminatory practices could have prevented Google from getting off the ground — and they could prevent the next Google from ever coming to be.