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MARKETPLACE

Anatomy of Search Results

The widening reality gap

User (mis-)perception

- Most users trust search engine results to be:
 - Relevant
 - Objective
 - Organic
- Google built this trust and expectation historically as it was technology-driven



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Google Homepage 1998

Evolution of search results pages

- Google search results pages have changed dramatically over time
- The following screenshots dated 2001 and 2011 illustrate the changes
- Increasing emphasis on Google's own expanding commercial services
- Less screen estate left for relevant, objective and organic search results
- Lost opportunity for SMEs to get fair and unbiased exposure to users
- Changes have been introduced incrementally, leading to a reality gap:

Perceived search results

- Mostly organic
- Objective
- Not commercially driven



Search results actual content

- Largely sponsored / promotional
- Emphasis on own services
- Commercially driven

Illustrative example: 2001

[Advanced Search](#)
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Searched the web for [casinos](#). Results 1 - 10 of about 4,700,000. Search took 0.06 seconds.

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www.worldwidevegas.com Featuring blackjack, slots, roulette and caribbean stud

Category: [Games](#) > [Gambling](#) > [Online](#) > [Directories](#) > [Casinos](#)

Internet Casinos

... INTERNET CASINOS INC. ESTABLISHED 1995. 1.888.522.6625.
 Play the machine to win some \$\$\$\$\$ GREEN \$\$\$\$\$. ...
www.casino.org/ - 14k - [Cached](#) - [Similar pages](#)

Station Casinos Entertainment

... NAJEE Boulder Station. Questions and Answers For Current Fiesta Employees.
 Legal information. © 2000 Station **Casinos**. Contact.
 Description: Includes Palace Station, Boulder Station, Texas Station, Sunset Station.
 Category:
[Games](#) > [Gambling](#) > [Casinos](#) > [By Location](#) > [United States](#) > [Nevada](#) > [Las Vegas](#)
www.stationcasinos.com/ - 22k - [Cached](#) - [Similar pages](#) - [Stock quotes: STN](#)

AMERISTAR CASINOS

Click here if you have Flash on your machine Get Flash.
 Click here for HTML version of the site.
 Description: Owns and operates casino/hotels and a cruise riverboat casino. (Nasdaq: ASCA)
 Category: [Business](#) > [Major Companies](#) > [Publicly Traded](#) > [A](#)
www.ameristars.com/ - 3k - [Cached](#) - [Similar pages](#) - [Stock quotes: ASCA](#)

Grand Casinos Online - Park Place Entertainment

Category: [Business](#) > [Major Companies](#) > [Publicly Traded](#) > [G](#)
www.grandcasinos.com/ - 1k - [Cached](#) - [Similar pages](#)

Avalon Internet Casinos (Online Casino) - Glamorous Gaming ...

... The All New Avalon Casino Platinum Club. Avalon **casinos** are proud to announce its new player reward program. The Platinum Club. All players whether new or old ...
 Description: Assorted online gaming for real or fun. Download the software to play all games.
 Category: [Games](#) > [Gambling](#) > [Online](#) > [Casinos](#) > [A](#)
www.avaloncasinos.com/ - 12k - [Cached](#) - [Similar pages](#)

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www.zantana.com
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[See your message here...](#)

Search results for “Casinos”

- Screen estate division:
 - Organic (68%) (white)
 - Sponsored (32%) (red)
- Sponsored results are clearly labelled as “sponsored links”
- Clear margin separation from organic search results

Illustrative example: 2011

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Google

casinos Search

About 35,200,000 results (0.08 seconds) [Advanced search](#)

Everything

Images

Videos

News

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More

Any time

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Past week

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Past year

Custom range...

All results

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Reuters - 4 related articles
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Casino - Wikipedia, the free encyclopedia

In modern English a **casino** is a facility that houses and accommodates certain types of gambling activities. **Casinos** are most commonly built near or combined ...
en.wikipedia.org/wiki/Casino - Cached - Similar

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Free £5 Casino Deposit

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Search results for “Casinos”

- Screen estate division:
 - Sponsored (53%) (red)
 - Google News (16%) (blue)
 - Google Offering (13%) (yellow)
 - Organic (11%) (white)
- Similar formatting of organic and non-organic results confuses
- Less-clear labelling of sponsored content (small label “Ads” used)
- Confusing generic labelling of own services (e.g. “News”)

Reality gap

Independent search results:

Perceived

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Google Search

About 35,200,000 results (0.08 seconds) [Advanced search](#)

Everything

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Any time

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- Custom range...

All results

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www.marriott.com - 85 West Street at Albany Street, New York - (212) 385-4900

B Wellington Hotel New York - ★★★★★ 1416 reviews - Place page
www.wellingtonhotel.com - 871 7th Avenue, New York - (212) 247-3900

C Embassy Suites Hotel New York City - ★★★★★ 394 reviews - Place page
www.newyorkcity.embassysuites.com - 102 North End Avenue, New York - (212) 945-0100

D New York's Hotel Pennsylvania - ★★★★★ 2011 reviews - Place page
www.hotelpenn.com - 401 7th Avenue at 33rd Street, New York - (212) 736-5000

E Hudson Hotel - ★★★★★ 1392 reviews - Place page
www.hudsonhotel.com - 356 West 58th Street, New York - (212) 554-8000

F Loews Hotels-Regency - ★★★★★ 405 reviews - Place page
www.loewshotels.com - 540 Park Avenue, New York - (212) 759-4100

G Hampton Inn Manhattan Times Square North - ★★★★★ 309 reviews - Place page
www.manhattantimesquarenorth.hamptoninn.com - 851 Eighth Avenue, New York - (212) 581-4100



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2011 Search results for "New York Hotels"

- No organic search results above the fold
- Only Google products or sponsored results
- Lost opportunity for SMEs as less relevant organic results shown to users

Consumer Impact

- Consumers ultimately pay higher costs for online services and are offered fewer competitive options, less innovation
 - With little screen estate left for unpaid listings, SMEs are forced to pay their way onto the 1st search results page to gain any visibility - these costs are ultimately passed through to consumers.
 - Google-owned services displace competing services, siphoning away revenues
 - Less capital available to competing services, hindering innovation
 - Lower revenues
 - Restricted access to investment capital
(less attractive business model, higher risk, less opportunity)
- The glide path leads inevitably more domination by Google of web services while reducing innovation and competition

Conclusion

- **Commercial motives** have led to significant changes in search results pages
- **Increasing proportion of sponsored ads** and Google's own services at the expense of organic, objective search results shown to users
- **Lost opportunity for SMEs** who rely on independent results seen by users
- **User perception** is that search results are largely independent – which is no longer the case
- Ultimately **consumers are harmed**: higher costs, less innovation
- **Widening reality gap**: Perceived search results vs. real content
- **Trust misplacement**: Content nature should be highlighted more explicitly to users with:
 - Clearer labelling
 - Clearer separation from organic results
 - Greater proportion given again to objective, organic search results