

*United States, et al.*  
*v.*  
*Google LLC*



September 8, 2022



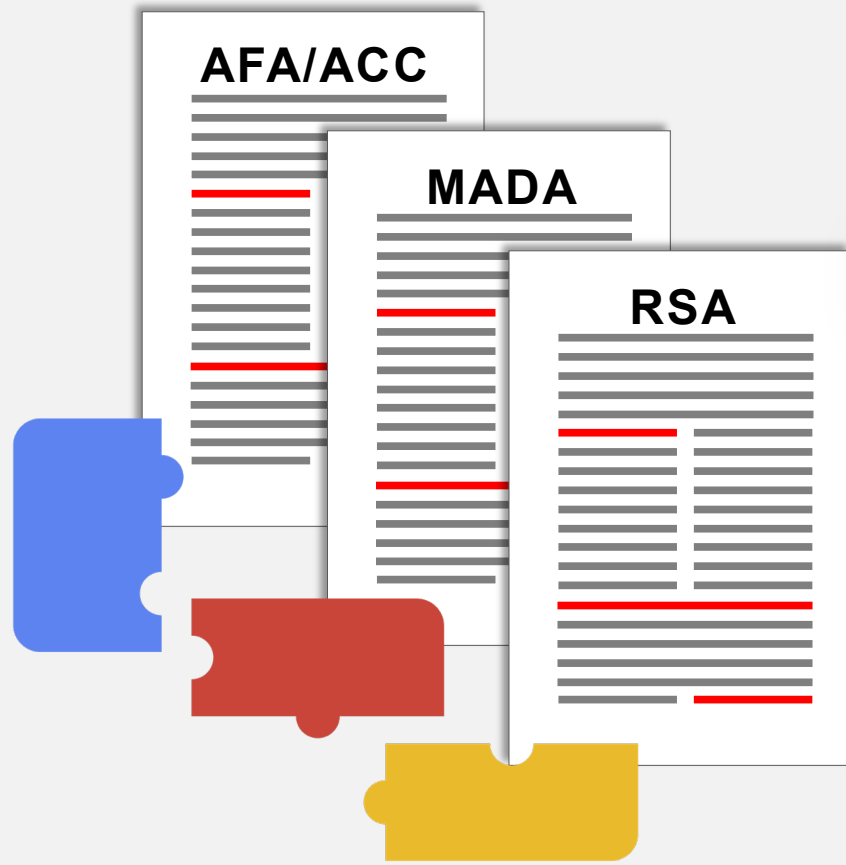
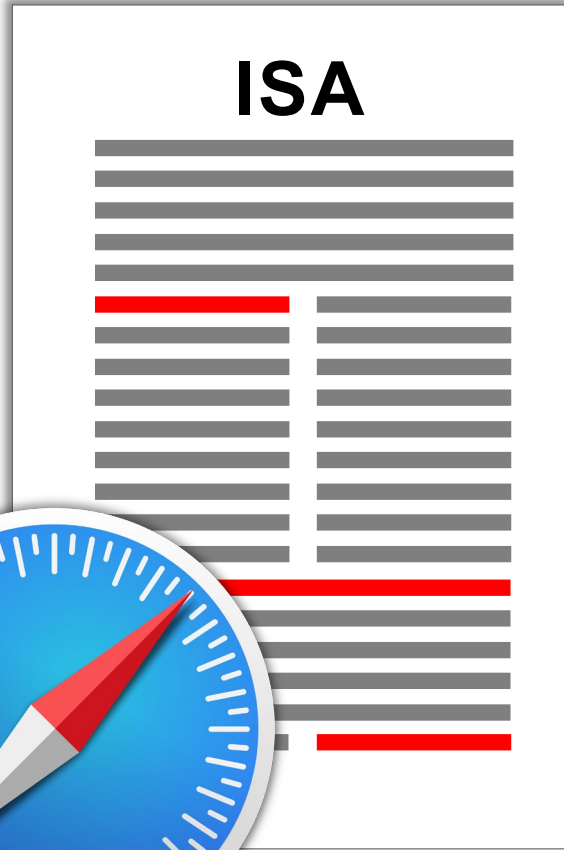
# United States, et al. v. Google LLC



android 



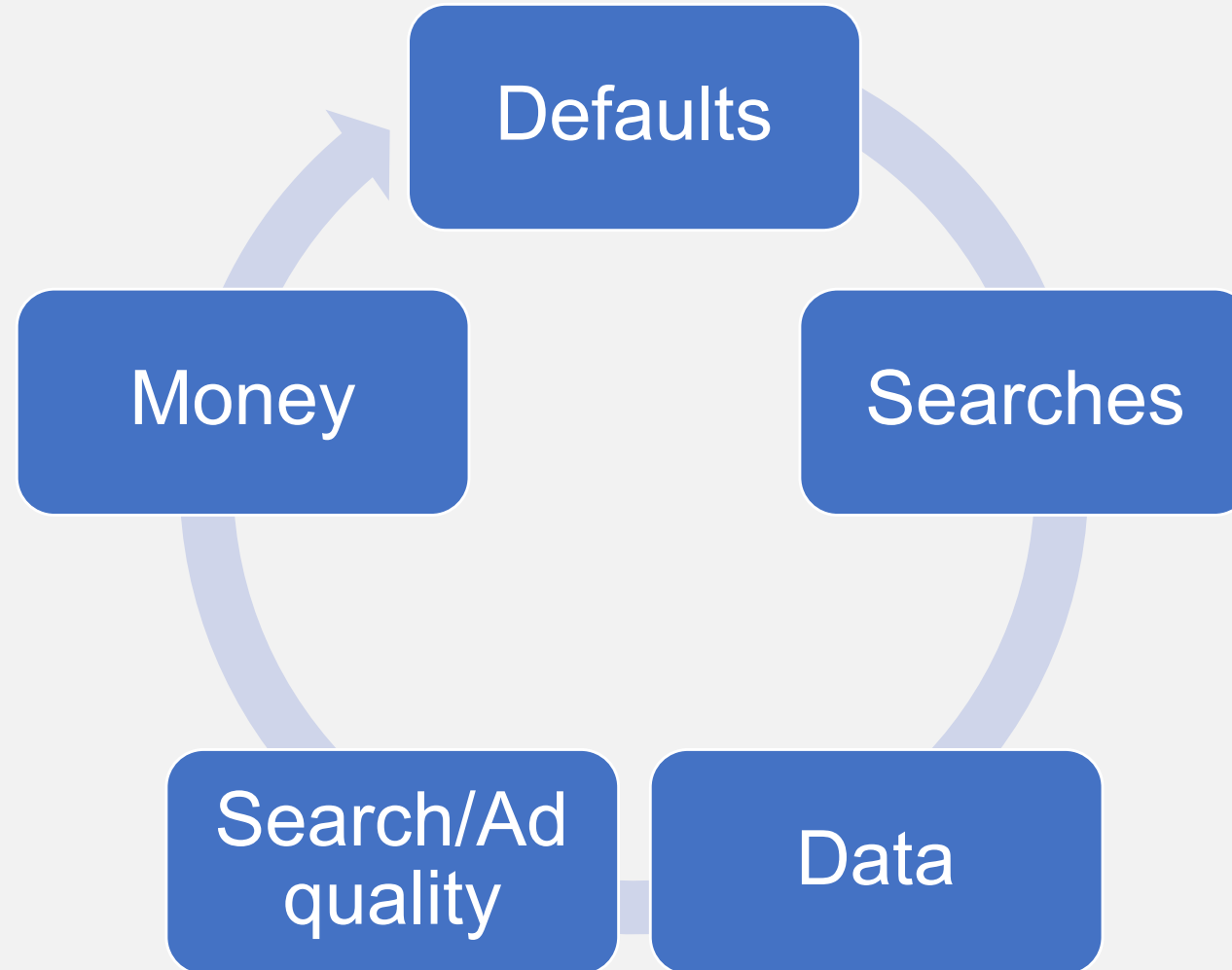
# United States, et al. v. Google LLC



android 



# United States, et al. v. Google LLC







# Roadmap

- 1 General Search Industry Overview
- 2 General Search Mechanics
- 3 Search Distribution
- 4 Google's Search Distribution Contracts
- 5 Search Advertising Industry Overview

# United States, et al. v. Google LLC

Case 1:20-cv-03010-APM Document 94 Filed 01/15/21 Page 1 of 65

IN THE UNITED STATES DISTRICT COURT  
FOR THE DISTRICT OF COLUMBIA

UNITED STATES OF AMERICA  
U.S. Department of Justice  
950 Pennsylvania Avenue NW  
Washington, DC 20530

STATE OF ARKANSAS  
323 Center Street, Suite 200  
Little Rock, AR 72201

STATE OF CALIFORNIA  
455 Golden Gate Avenue  
San Francisco, CA 94102

STATE OF FLORIDA  
PL-01, The Capitol  
Tallahassee, FL 32399

STATE OF GEORGIA  
40 Capitol Square SW  
Atlanta, GA 30334

STATE OF INDIANA  
302 West Washington Street  
IGCS – 5th Floor  
Indianapolis, IN 46204

COMMONWEALTH OF KENTUCKY  
1024 Capital Center Drive, Suite 200  
Frankfort, KY 40601

STATE OF LOUISIANA  
1885 North Third Street  
Baton Rouge, LA 70802

STATE OF MICHIGAN  
P.O. Box 30736  
Lansing, MI 48909

STATE OF MISSISSIPPI  
P.O. Box 220  
Jackson, MS 39205

Case No. 1:20-cv-03010-  
HON. AMIT P. MEHTA

21 Page 3 of 65

under Section 2 of the  
unlawfully maintaining  
ing, and general search text  
nary practices, and to

in Valley as a scrappy  
Google is long gone. The  
f the wealthiest companies  
succeeding \$160 billion. For  
extend its monopolies in the  
search text advertising—the

must find an effective path  
be distributed primarily on  
and laptops). These devices

contain web browsers (software applications for accessing information on the internet) and other  
“search access points” that call on a general search engine to respond to a user’s query. Over the  
last ten years, internet searches on mobile devices have grown rapidly, eclipsing searches on  
computers and making mobile devices the most important avenue for search distribution in the  
United States.

3. For a general search engine, by far the most effective means of distribution is to  
be the preset default general search engine for mobile and computer search access points. Even  
where users can change the default, they rarely do. This leaves the preset default general search

3

## I. NATURE OF THIS ACTION

1. Two decades ago, Google became the darling of Silicon Valley as a scrappy startup with an innovative way to search the emerging internet. That Google is long gone. The Google of today is a monopoly gatekeeper for the internet, and one of the wealthiest companies on the planet, with a market value of \$1 trillion and annual revenue exceeding \$160 billion. For many years, Google has used anticompetitive tactics to maintain and extend its monopolies in the markets for general search services, search advertising, and general search text advertising—the cornerstones of its empire.



# Roadmap

1 General Search Industry Overview

2 General Search Mechanics

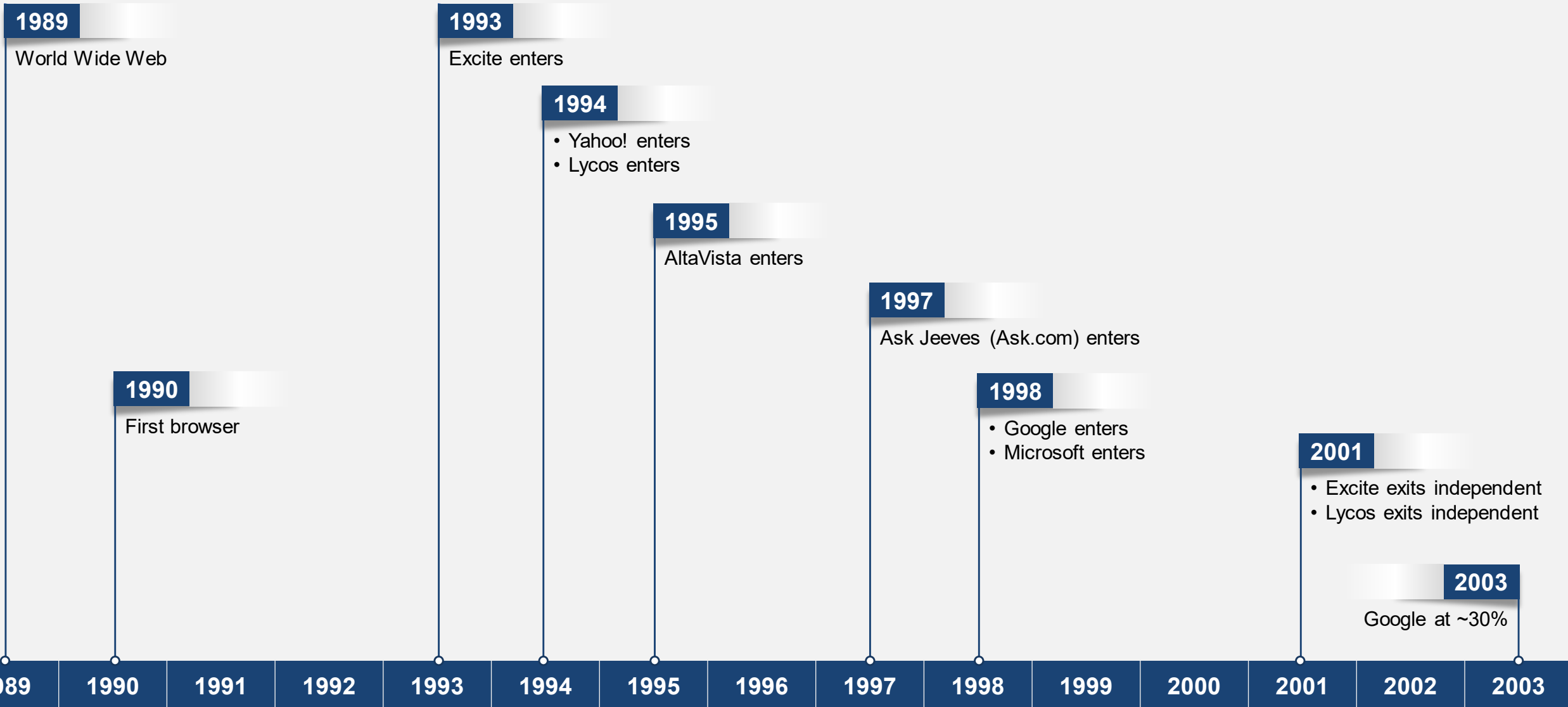
3 Search Distribution

4 Google's Search Distribution Contracts

5 Search Advertising Industry Overview



# Search Timeline

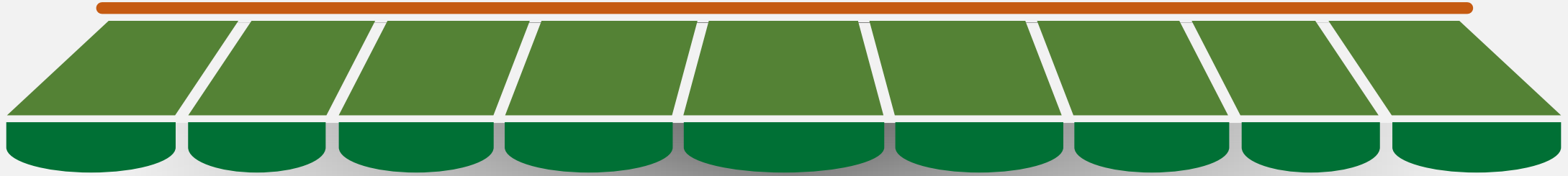


What is general search?






# One-Stop Shopping



- Capable of answering *all* types of queries
- Reduces mental costs and time
- Answers from a broad variety of sources
- Habit formation
- Easy to access on mobile devices and browsers



# General Search

 best time of year to visit Japan

 sumo wrestling tickets

 best hotels in japan

 direct flight to Japan from Dulles

 best suitcase for Japan travel



## Visiting Japan

 things to do in Ryokan

 cell phones in Japan

 Japan rail pass v. daily tickets

 learning basic Japanese

 Group backpack trip in japan



# General Search

Google



VISITING JAPAN

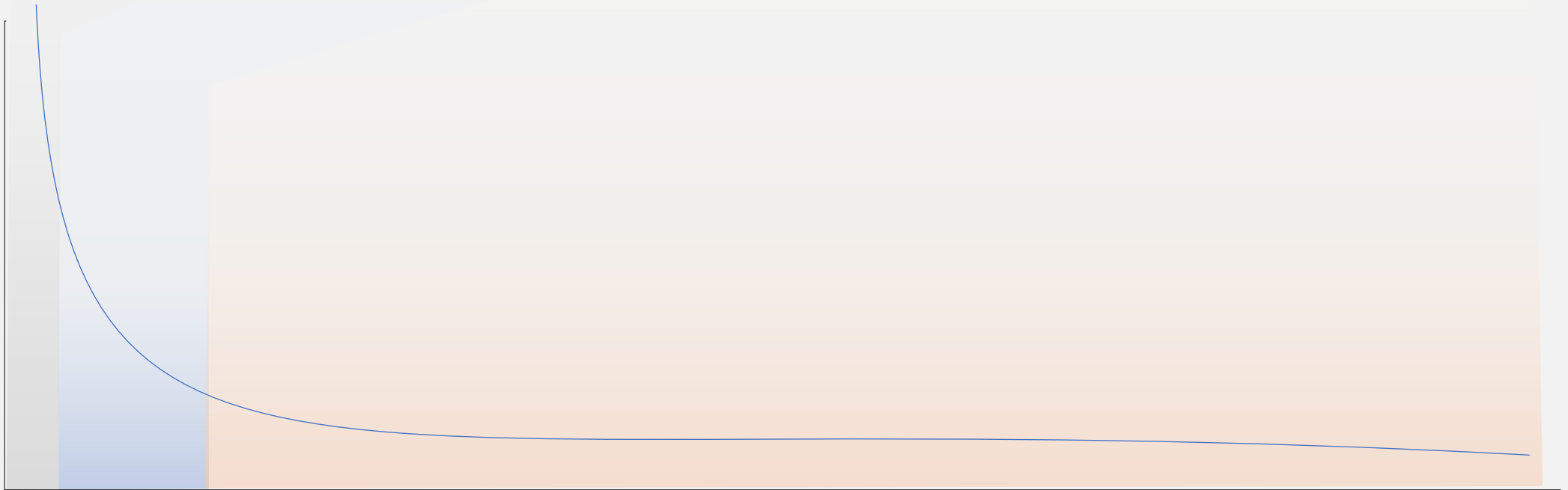




# General Search



Query Frequency



Query Distinctness



# General Search

## Queries

**Head**

“United Airlines”

**Torso**

“Train Schedule From Tokyo to  
Kyoto”

**Tail**

“Ramen restaurant in Hakone japan  
with red awning”





# General Search





# General Search

## SERP Organic results

The screenshot shows a Google search for "Visiting Japan" on a desktop browser. The search bar contains "Visiting Japan" and the Google logo is visible. Below the search bar, there are navigation links for "All", "News", "Videos", "Images", "Maps", and "More". The search results show "About 2,160,000,000 results (0.64 seconds)". The first result is from <https://jp.usembassy.gov> with the title "COVID-19 Information - U.S. Embassy & Consulates in Japan". The snippet reads: "Japanese citizens and foreign residents with a reentry permit are generally allowed to reenter Japan but must comply with strict pre- and post- travel testing requirements and quarantine upon arrival, if required." The second result is from <https://www.japan.go.jp> with the title "Visiting Japan | The Government of Japan - JapanGov -". The snippet reads: "General information about tourism, visas, customs, working, studying, teaching, and more." The third result is from <https://www.japan.travel> with the title "JNTO - Official Tourism Guide for Japan Travel". The snippet reads: "Official Japan National Tourism Organization, providing free advice and information to Travelers. ... Number of visitor arrivals to Japan (July 2022). Japan in August · Japan in September · Japan in July · Japan in June".



# General Search

## SERP Advertising

**Ad** · <https://www.nationalgeographic.com/> ⋮

### National Geographic - Trips To Japan

Travel Beyond Your Wildest Dreams. See the World Close-Up with Nat Geo Experts. Explore All That **Japan** Has To Offer! Request A Free Catalog To Plan Your Next Trip. Hiking Trips.

★★★★★ Rating for nationalgeographic.com: 4.6 - Return policy: Most items 30+ days

[Find The Trip For You](#) · [Special Offers](#) · [Reserve Online](#) · [Discover the Difference](#)

**Ad** · <https://www.thegetaway.com/japan/things-to-do> ⋮

### Top 12 Things To Do In Japan - Must Sees, Dos & Visits (2022)

Imperial Tokyo, Historic Kyoto & More - See 10 Best Places To **Visit** In **Japan**. Imperial Tokyo, Historic Kyoto & More - See Top 10 Things to Do in **Japan**. Vacation Ideas.

[10 Most Beautiful Places](#) · [Things To Do In Japan](#) · [Travel Insurance Tips](#) · [Trip Planning](#)

**Ad** · <https://www.kensingtontours.com/> ⋮

### Tailor-Made Japan Tours - Nat'l Geographic Award Winner

Tailor-Made Experiences; Expert Private Guides; Unbeatable Value. Request A Custom Quote.

Hand-Picked Hotels & Ryokan, Hidden Gems, 24/7 In-Country Support & Unbeatable Value.

Fast Custom Quotes. 30,000+ Delighted Clients. Risk-Free Booking Offer.

[Top Ryokan & Hotels](#) · [Private Guides](#) · [Expert Planners](#) · [24/7 In-Country Support](#)

What are dimensions of  
quality in general search?



# Search Quality



Relevance



Privacy



Accuracy



Freshness



Latency



Many Others



Safety



Device Optimization







# Search Timeline

1989

World Wide Web

1993

Excite enters

1994

- Yahoo! enters
- Lycos enters

1995

AltaVista enters

1997

Ask Jeeves (Ask.com) enters

1998

- Google enters
- Microsoft enters

2001

- Excite exits independent
- Lycos exits independent

2003

Google at ~30%

2008

DuckDuckGo enters



Who provides general  
search in the US?



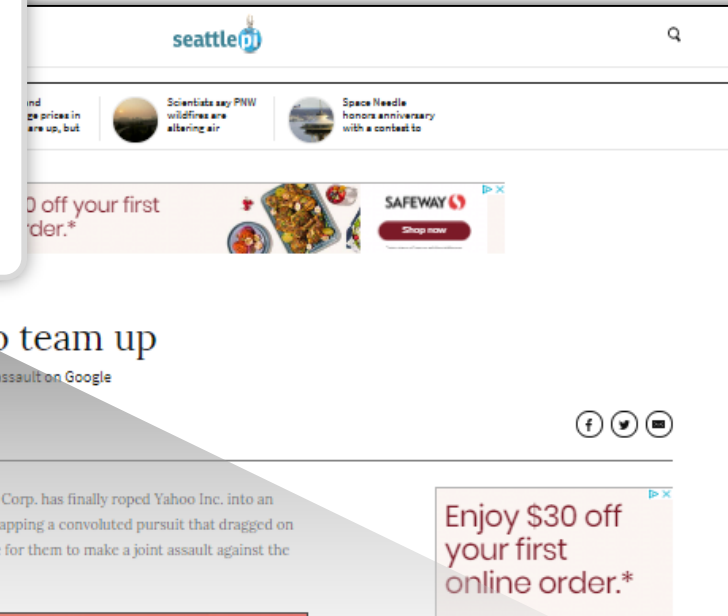
# General Search Providers

Independent vs. Syndicated



# General Search Providers

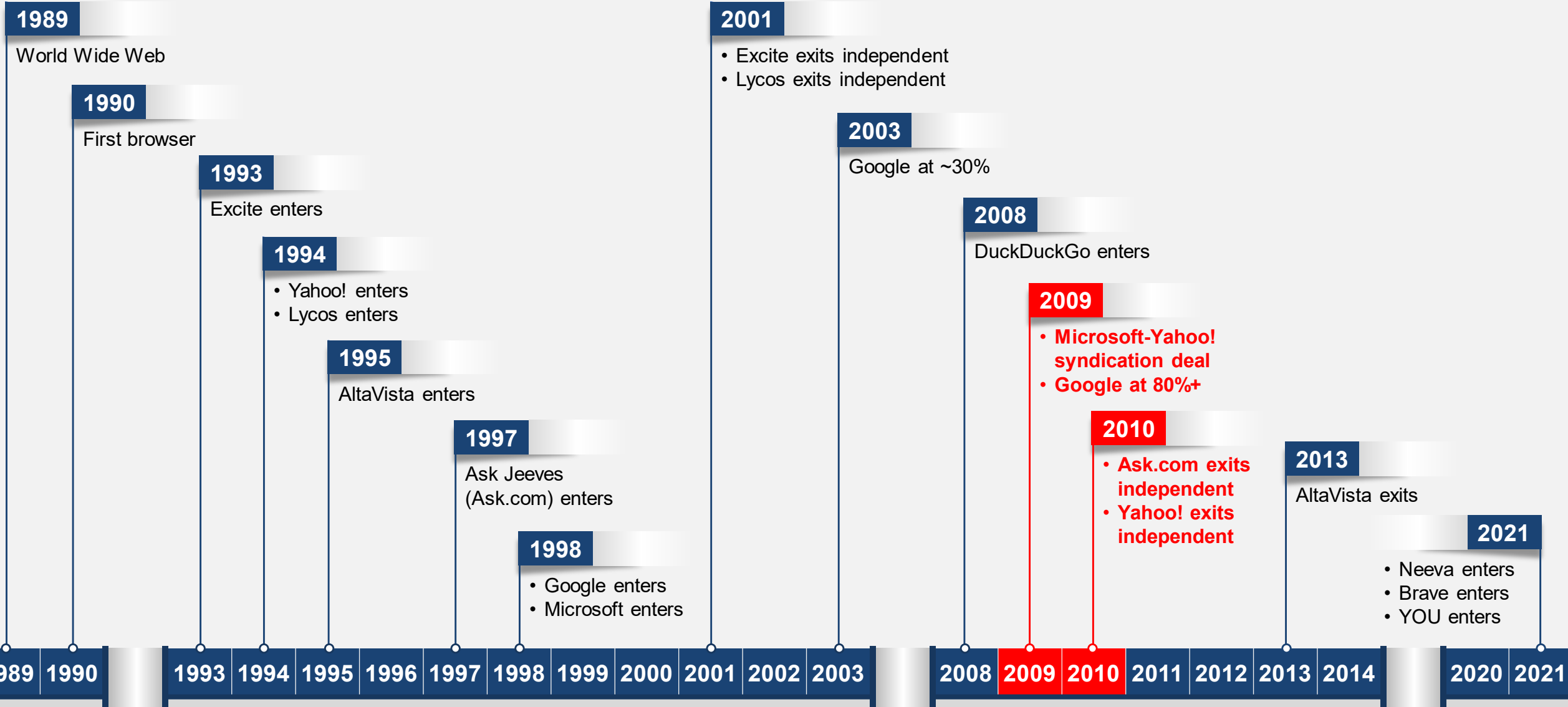
## Microsoft, Yahoo Team Up to Ding Google With Bing



## Microsoft, Yahoo team up Internet search partnership sets stage for assault on Google



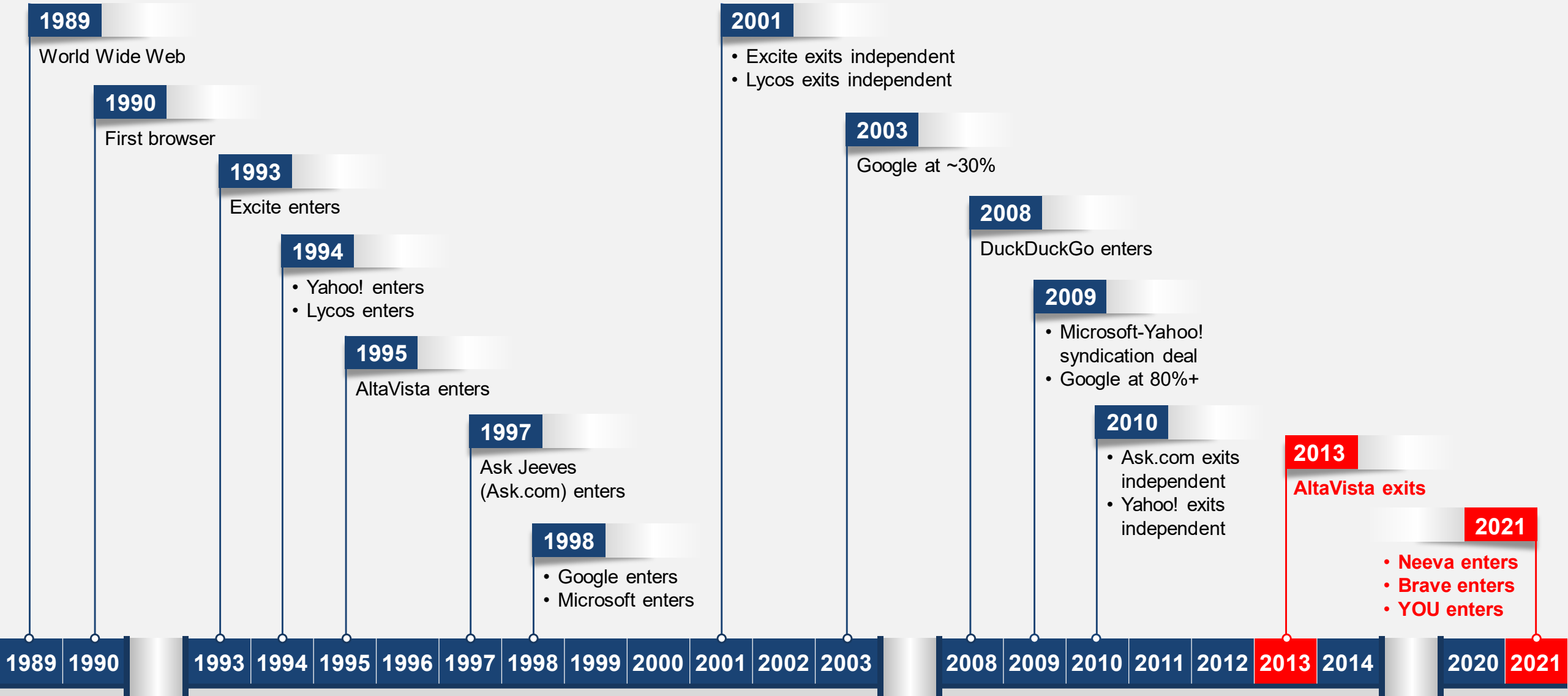
# Search Timeline







# Search Timeline



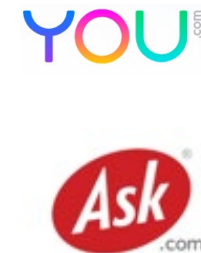


# General Search Providers

## Independent General Search Services



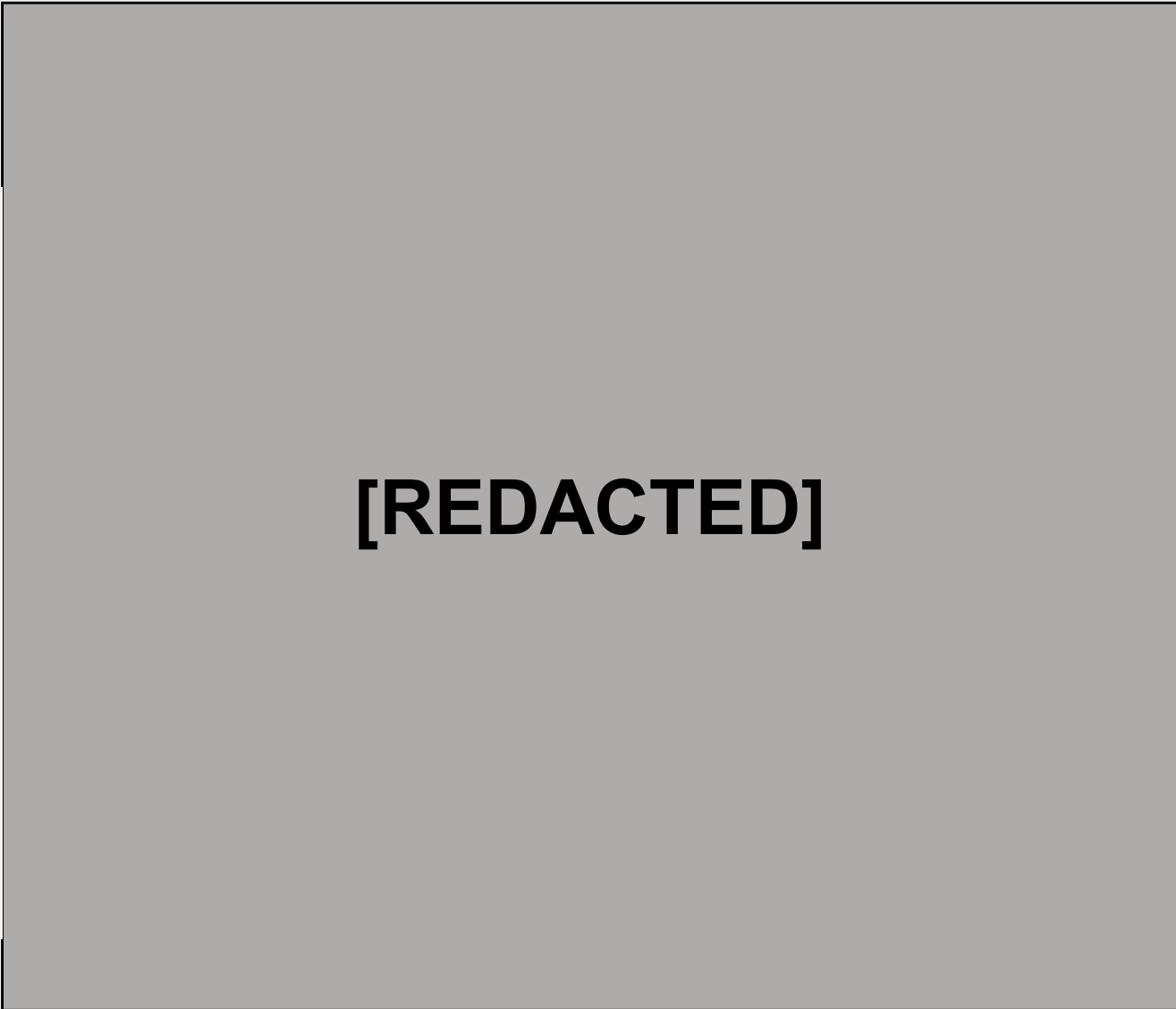
## Syndicated General Search Services





# General Search Providers

- Google
- Microsoft Bing
- DuckDuckGo
- yahoo!
- Other



What is *not* a general  
search engine?



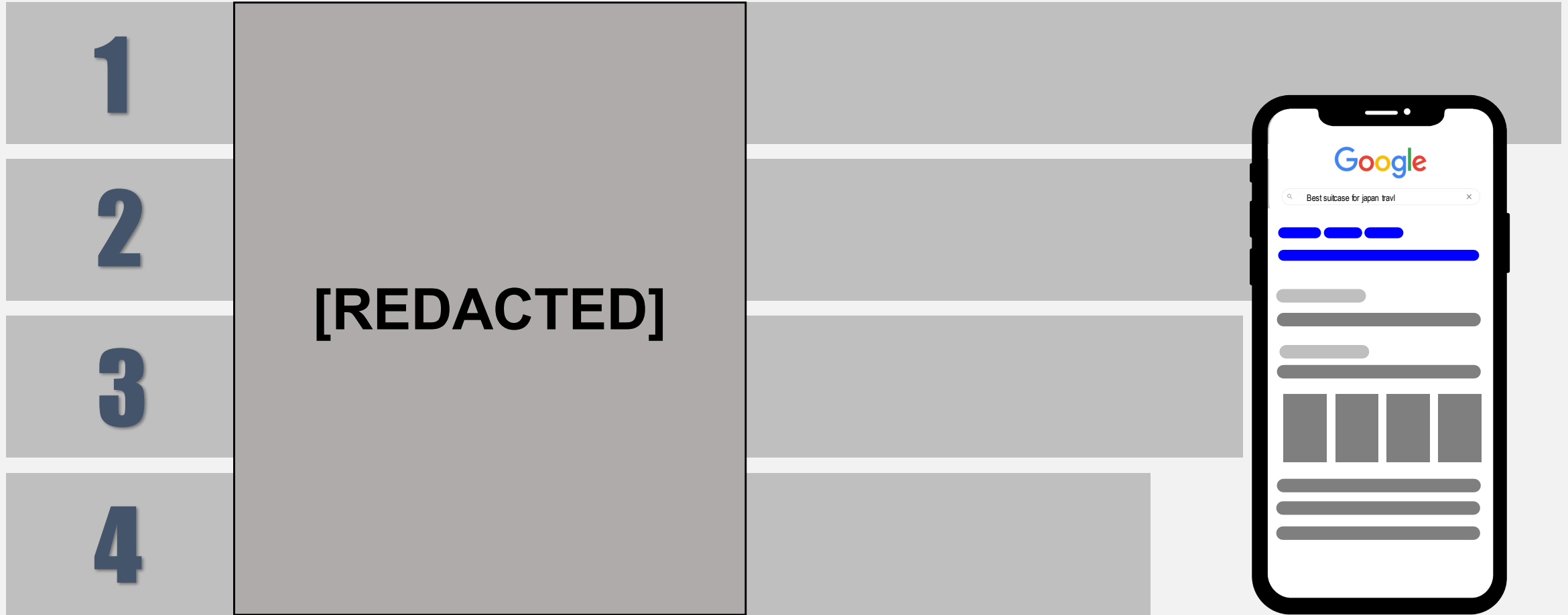
# Not General Search

Specialized Search  
Services & Other  
Websites





# Not General Search



Note: Google data includes advertisers from Google's O&O properties.



# Not General Search

Specialized Search  
Services & Other  
Websites



Voice Assistants



Siri





# Not General Search

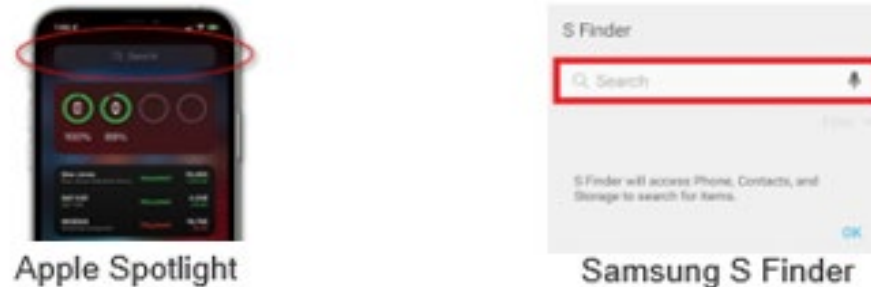
Specialized Search  
Services & Other  
Websites



Voice Assistants



Device Search







# Not General Search

Product	AMZN	AAPL	GOOG	FB	MSFT
operating systems	✓	✓	✓		✓
browsers		✓	✓		✓
productivity tools		✓	✓		✓
email and messaging		✓	✓	✓	✓
ebooks	✓	✓	✓		
smartphones and devices	✓	✓	✓		✓
video and music distribution	✓	✓	✓		
streaming video	✓		✓	✓	
video conferencing		✓	✓	✓	✓
home delivery services	✓		✓		
general purpose search engines			✓		✓
special purpose search engines	✓	✓	✓		✓
digital assistants	✓	✓	✓	✓	✓
social networks			✓	✓	
advertising platforms	✓		✓	✓	✓
maps		✓	✓		✓
cloud services	✓		✓		✓

Table 1: Competition among internet companies

Is general search free?



# General Search

It's free, but . . .



# Roadmap

1 General Search Industry Overview

2 General Search Mechanics

3 Search Distribution

4 Google's Search Distribution Contracts

5 Search Advertising Industry Overview

What data does Google collect on the search side?



# General Search



About 73,900,000 results (0.47 seconds)

All travelers permitted to travel to Japan, regardless of age, **must receive a negative COVID-19 test within 72 hours of departure of the international leg of their trip.** Domestic travel prior to the international flight is NOT counted within the 72 hours. 4 days ago

<https://jp.usembassy.gov> › covid-19-information

**COVID-19 Information - U.S. Embassy & Consulates in Japan**

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<https://www.japan.travel> › government-measures

**Coronavirus (COVID-19) Travel Restrictions - Japan- Travel**

1.1.529), validity of visas already issued by December 2, 2021 is suspended except for the status of residence of "Spouse or Child of a **Japanese National** ...

Europe: Bosnia and Herzegovina, Bulgaria, Ky... Africa: Algeria, Angola, Cameroon, Central ...

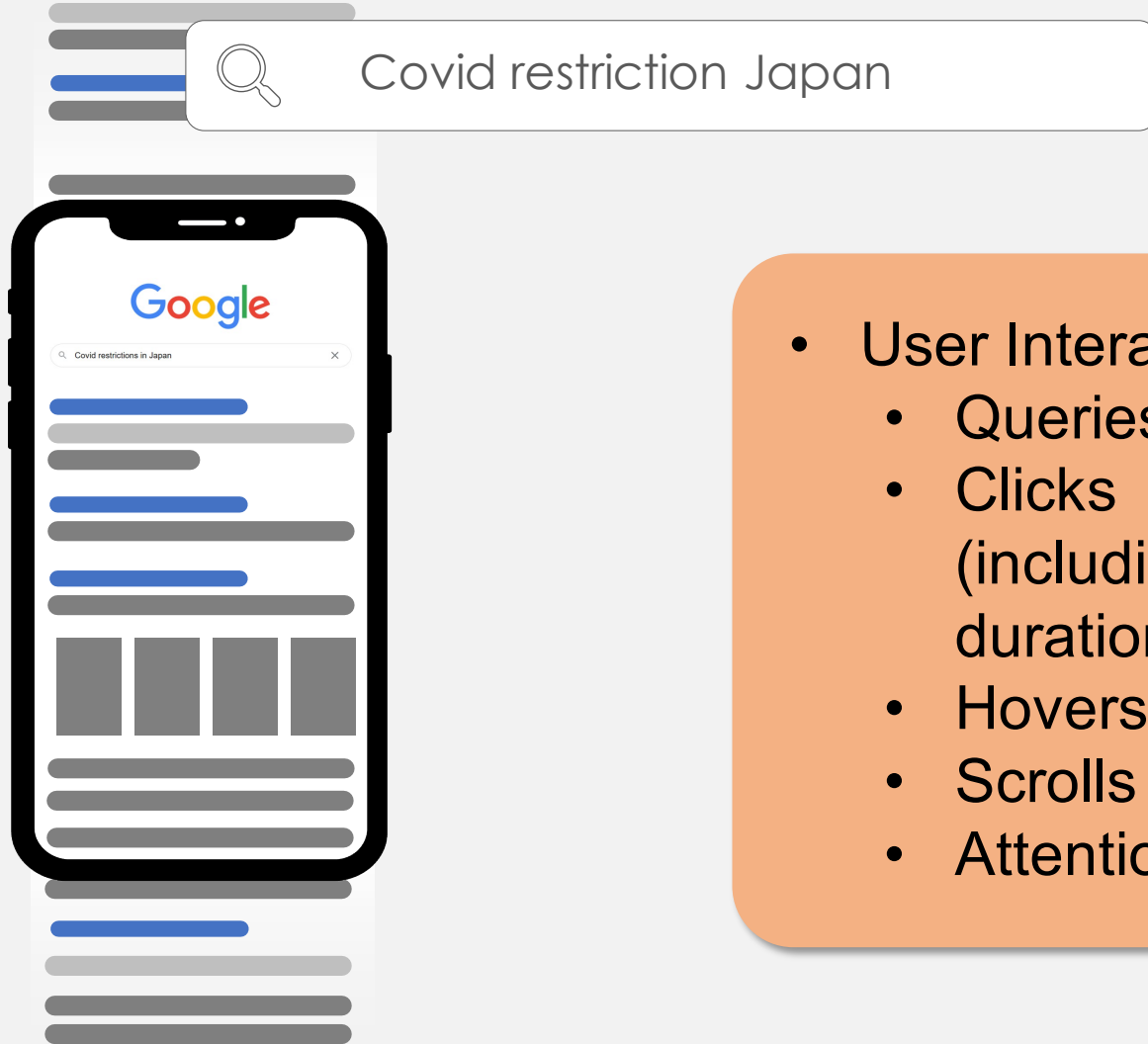
<https://www.mofa.go.jp> › fna

**Border measures to prevent the spread of novel coronavirus ...**

Border measures to prevent the spread of novel **coronavirus (COVID-19)**. August 26, 2022. **Japanese ... Restrictions** on airport/ports for arrival; 7.



# General Search



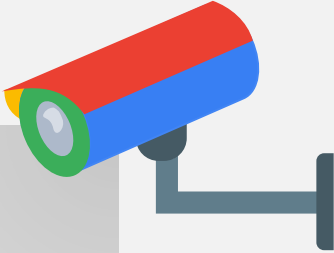
- User Interaction
  - Queries
  - Clicks (including duration)
  - Hovers
  - Scrolls
  - Attention

Language

Location

In-session search history

Much more . . .



How does general  
search work?





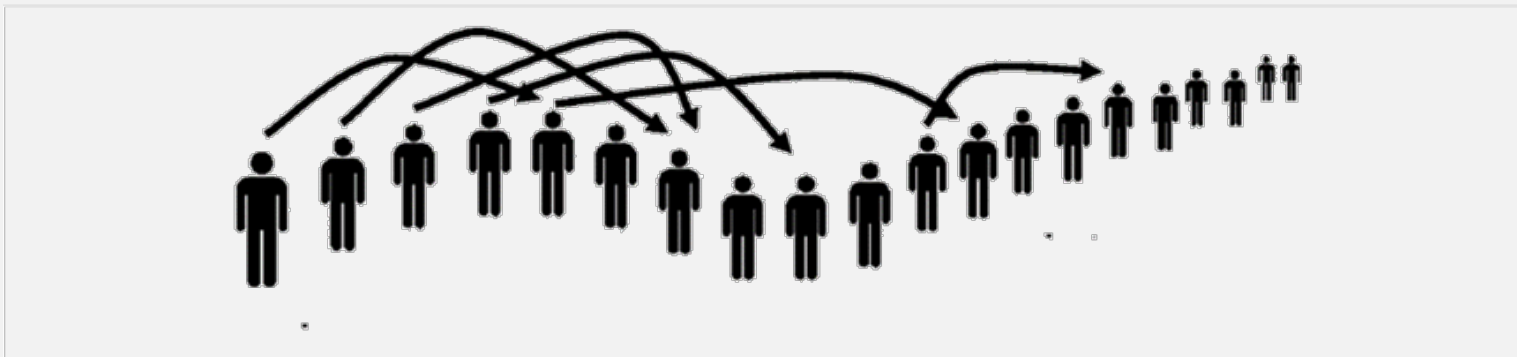
# General Search

“Every year, there are trillions of searches on Google . . .”



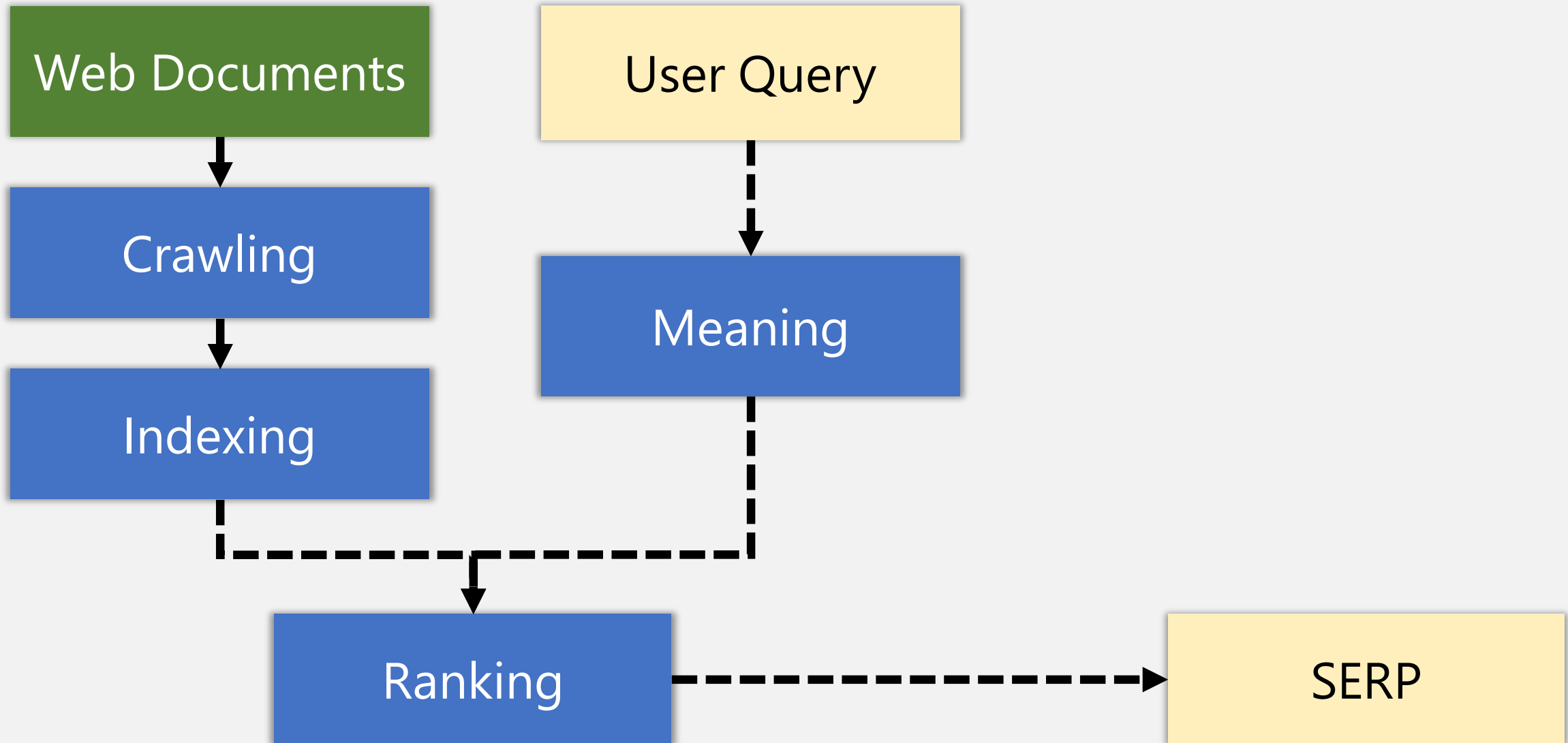
# How Does It Work?

“In effect, Google is a mechanism for transferring knowledge from each user to those who follow.”



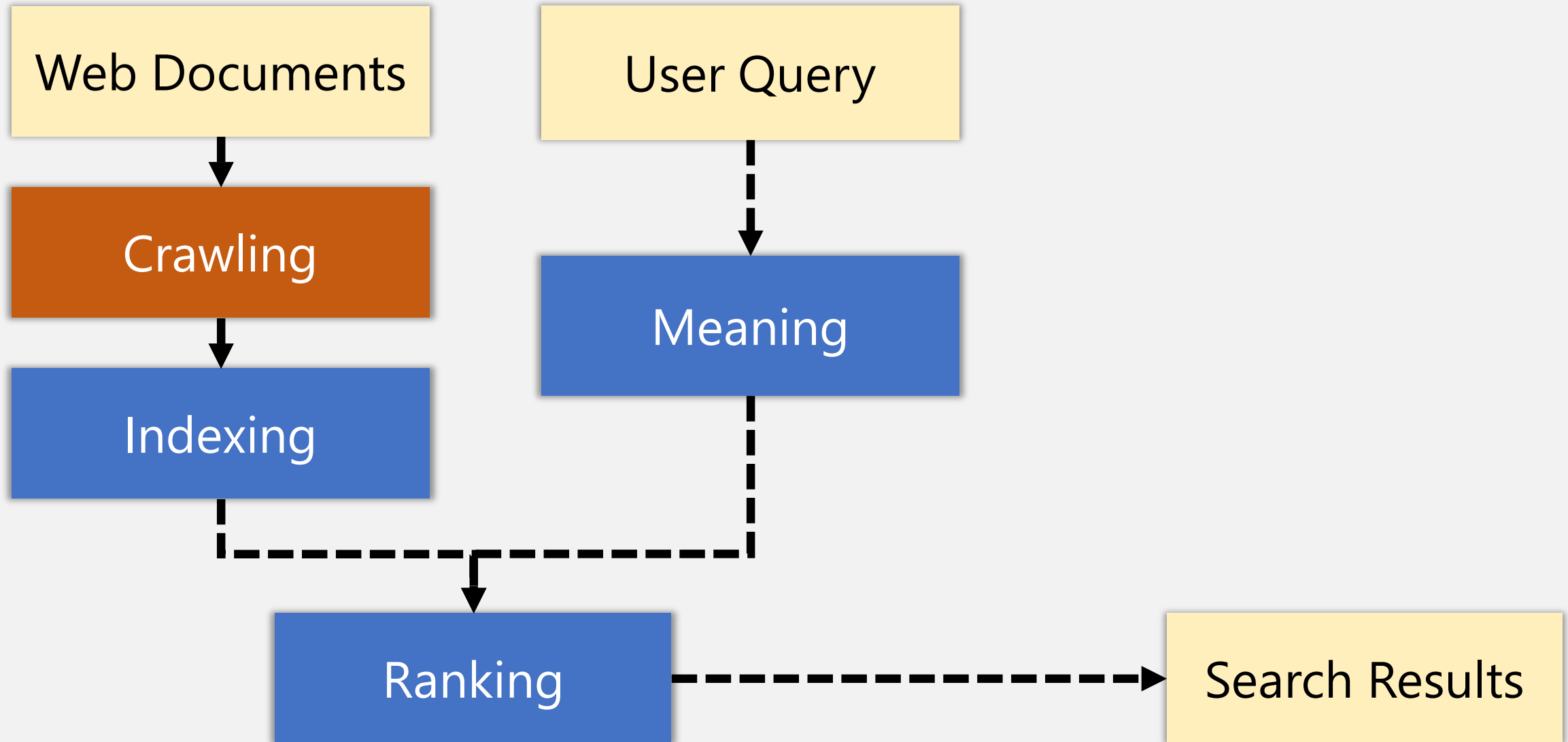


# How Does General Search Work?





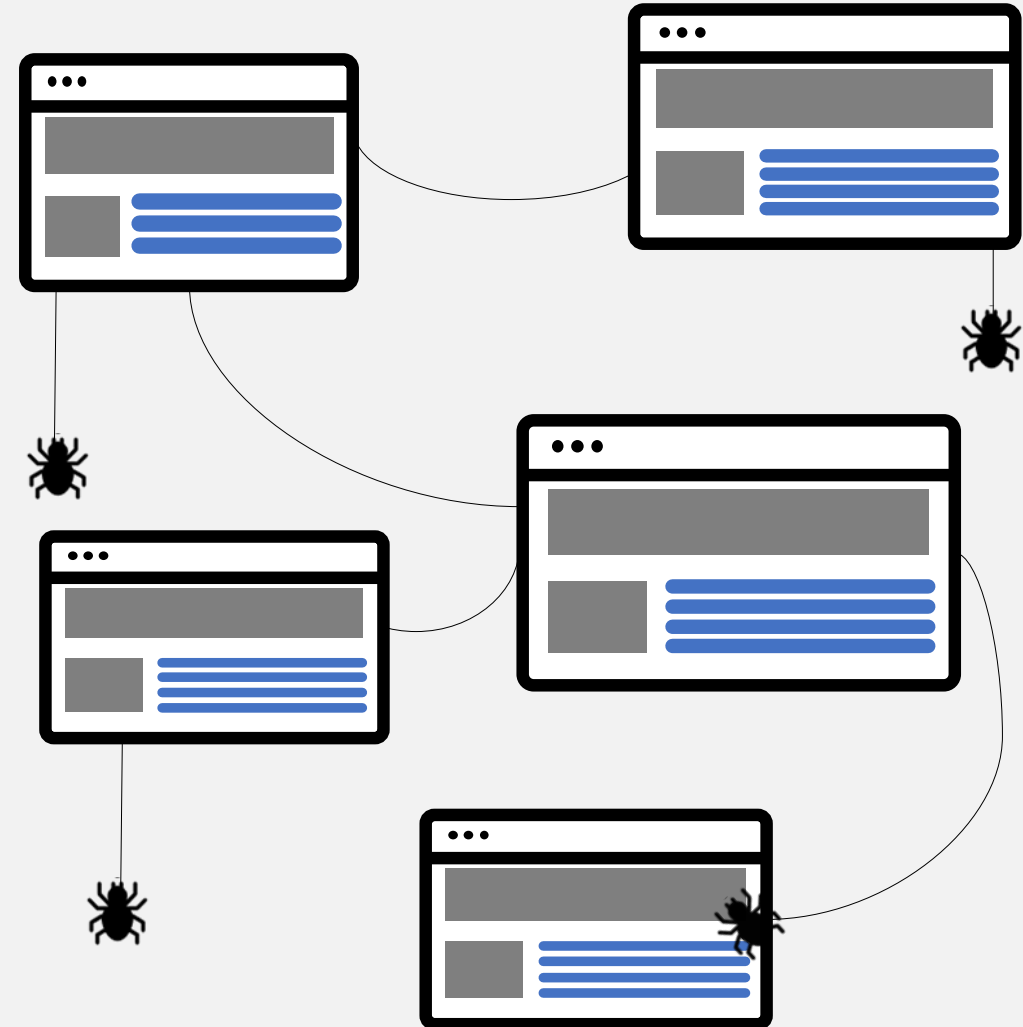
# How Does General Search Work?





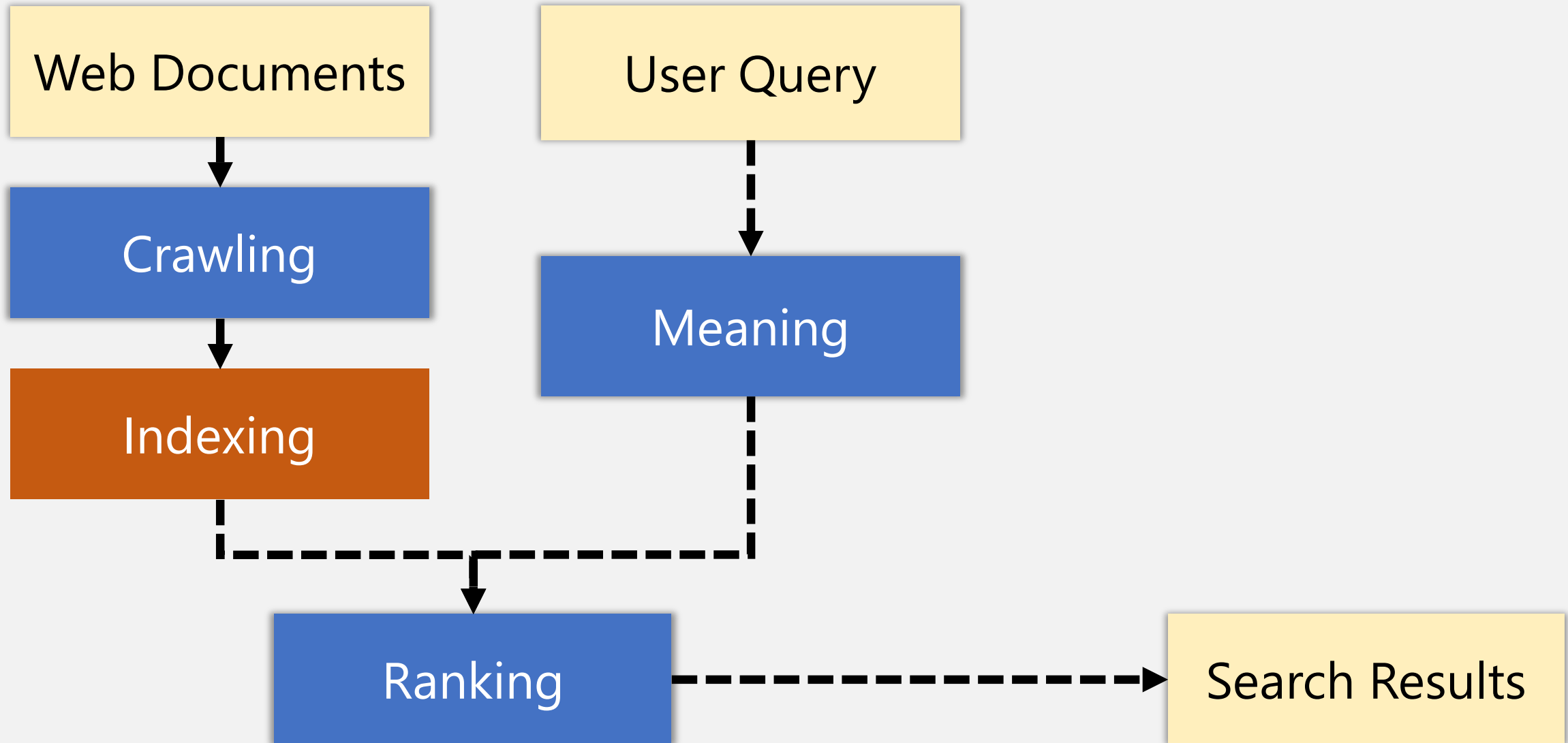
# How Does General Search Work?

Crawling



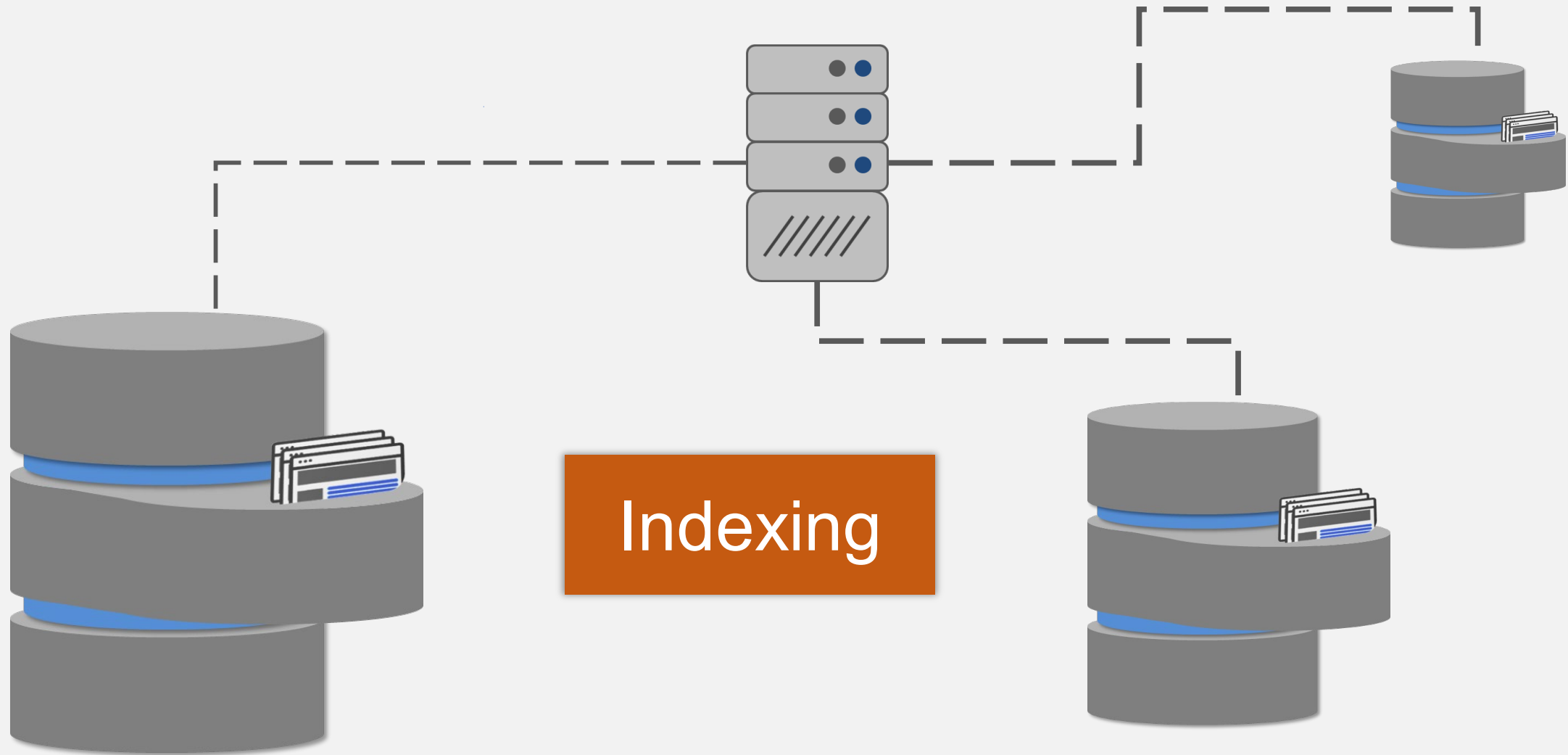


# How Does General Search Work?



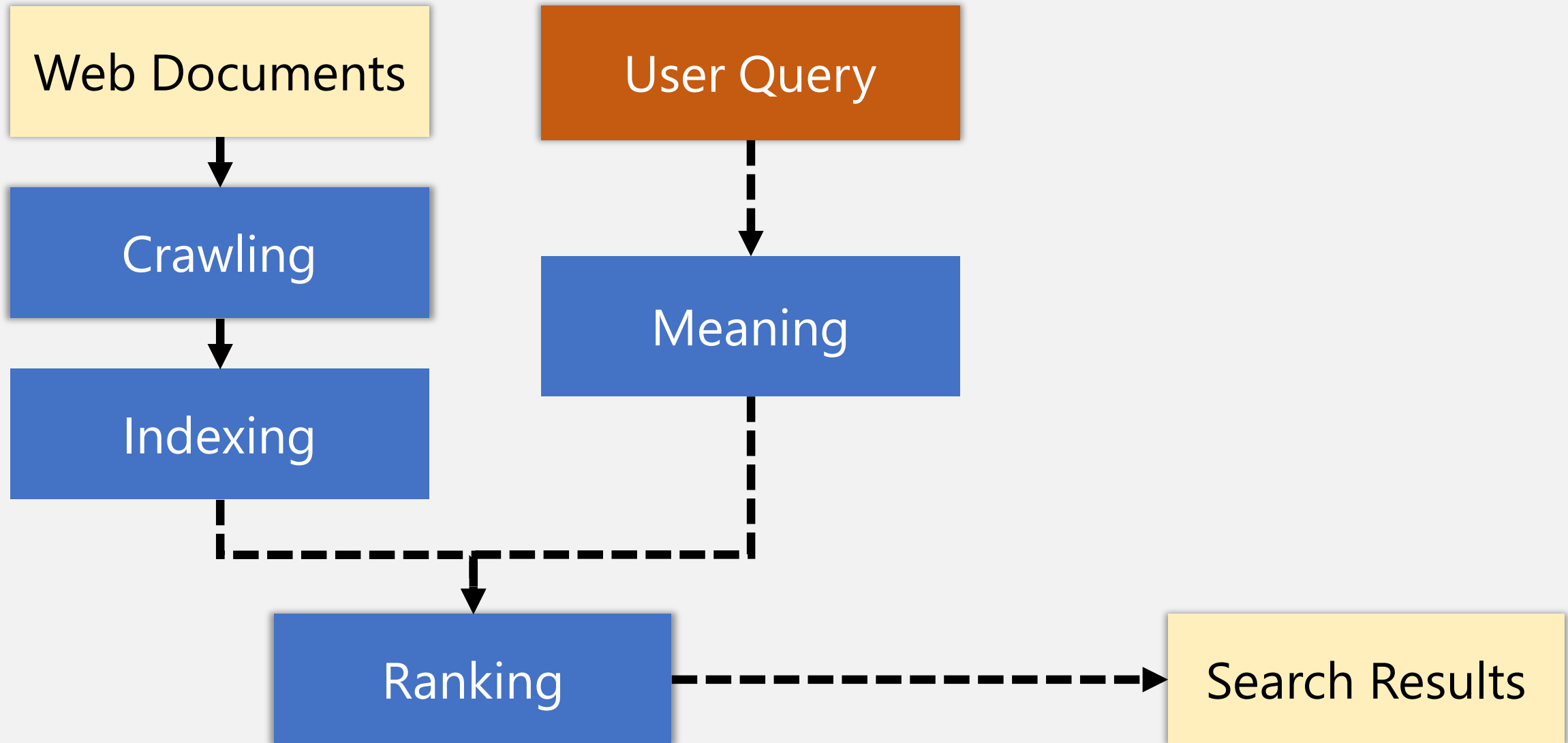


# How Does General Search Work?





# How Does General Search Work?







# How Does General Search Work?

Google

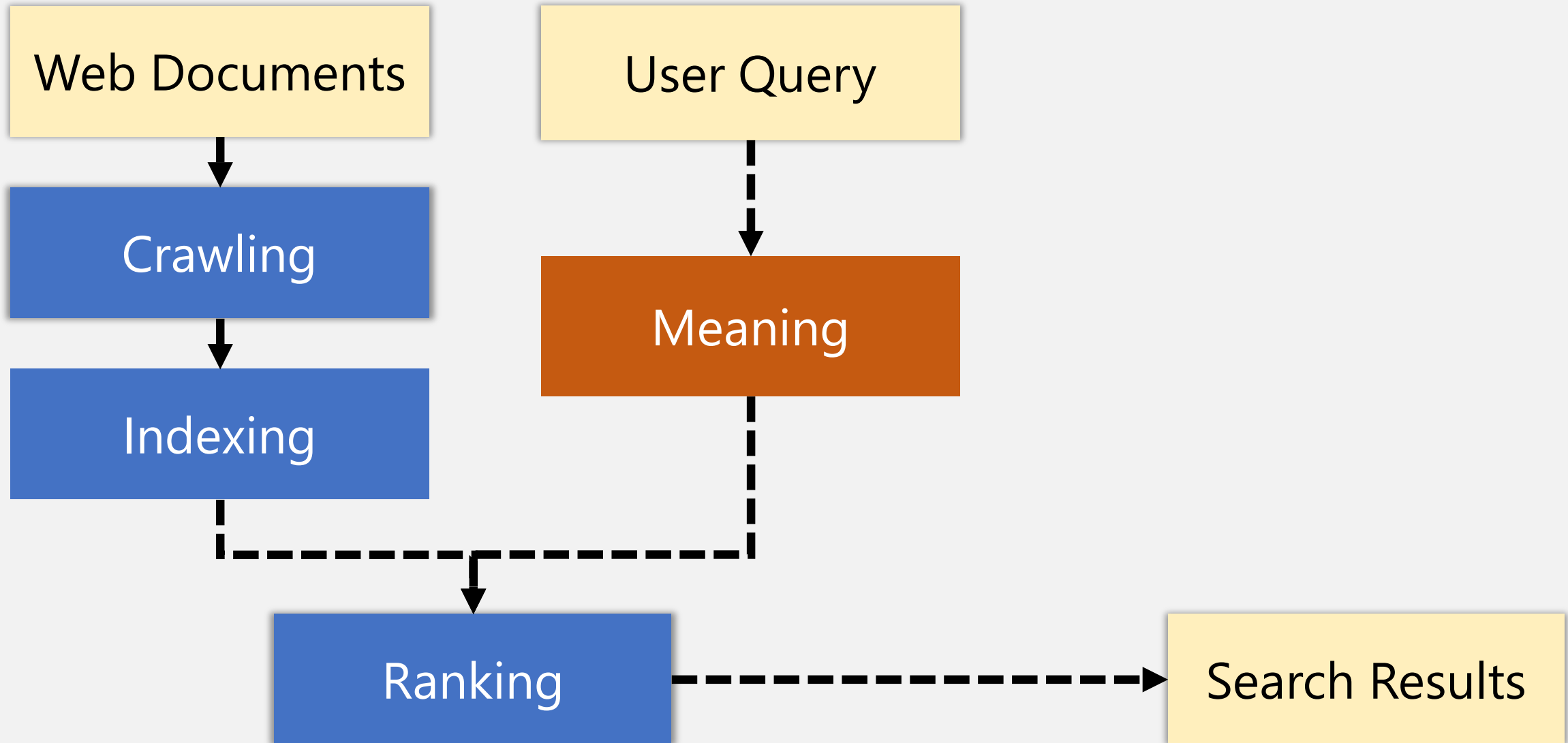
best suitcase for japan **travl**



User Query



# How Does General Search Work?





# How Does General Search Work?

## Spelling

Q where to buy suitcase for japan **travl**

Q where to buy suitcase for japan **travel**

Meaning



# How Does General Search Work?

how long do I need to cornteen

can I beleve the news

symptoms coronavyrus

how to acheive sugcess

britney speers new song

“How? By looking for mistakes. We look at all the ways in which people mis-spell words in queries and text all over the web, and use that to predict what you actually mean.”



# How Does General Search Work?

Meaning

## Spelling

Q where to buy suitcase for japan **travl**

Q where to buy suitcase for japan **travel**

## Synonyms

Q where to buy **suitcase** for japan travel

Q where to buy **suitcase or luggage** for japan travel



# How Does General Search Work?

Meaning

## Spelling

Q where to buy suitcase for japan **travl**

Q where to buy suitcase for japan **travel**

## Synonyms

Q where to buy **suitcase** for japan travel

Q where to buy **suitcase or luggage** for japan travel

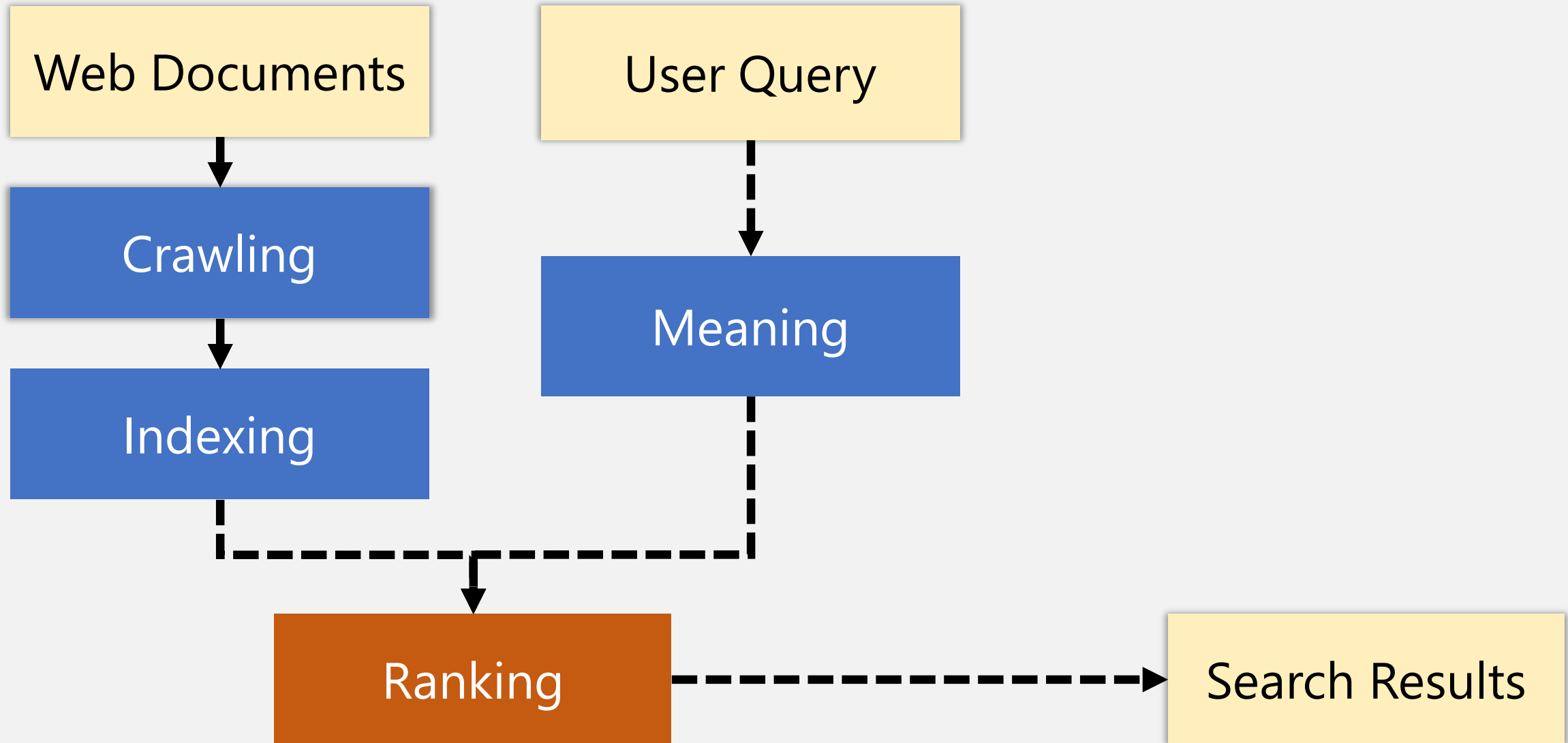
## Location

Q where to buy suitcase for japan travel

Q where to buy suitcase for japan travel **near capitol hill, dc**



# How Does General Search Work?





# How Does General Search Work?



About 73,900,000 results (0.47 seconds)

All travelers permitted to travel to Japan, regardless of age, **must receive a negative COVID-19 test within 72 hours of departure of the international leg of their trip.**

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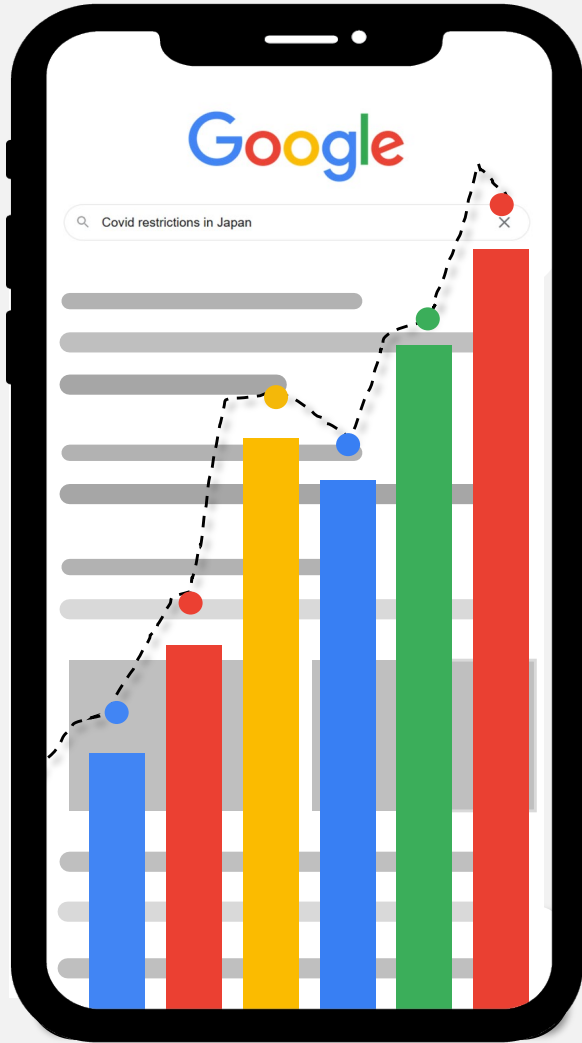
Border measures to prevent the spread of novel **coronavirus (COVID-19)**. August 26, 2022.

**Japanese ... Restrictions** on airport/ports for arrival; 7.





# How Does General Search Work?



Ranking



# How Does General Search Work?

“[REDACTED]”





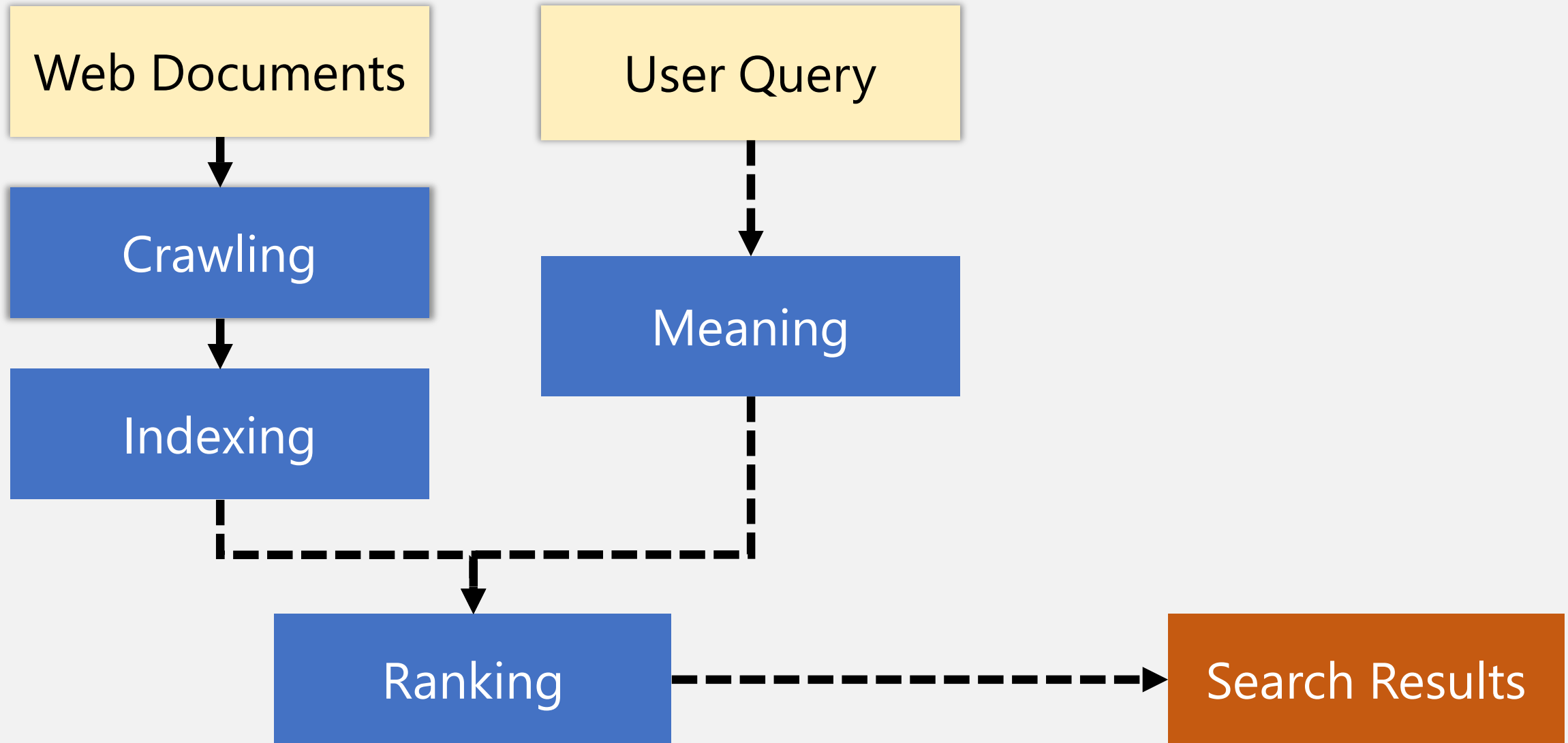
# How Does General Search Work?



“We can regard each [search] as a massive multiple-choice test. Each day, we get to ask humanity a billion questions of the form, ‘Which of these 10 documents is most relevant to your query?’ Then some person helpfully answers with a click, which teaches us something about the world.”

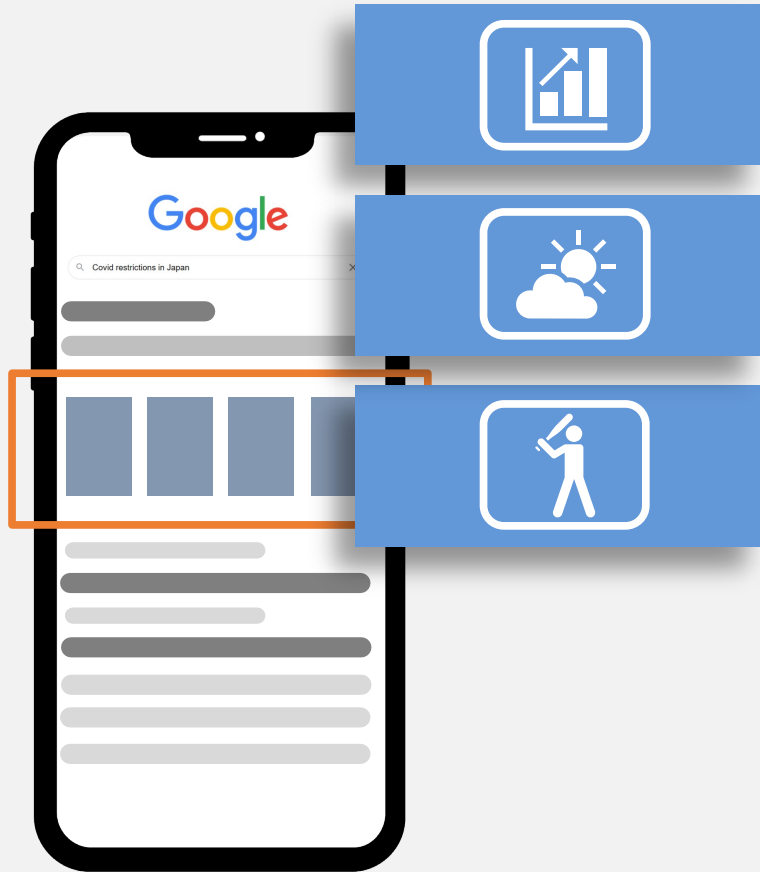


# How Does General Search Work?





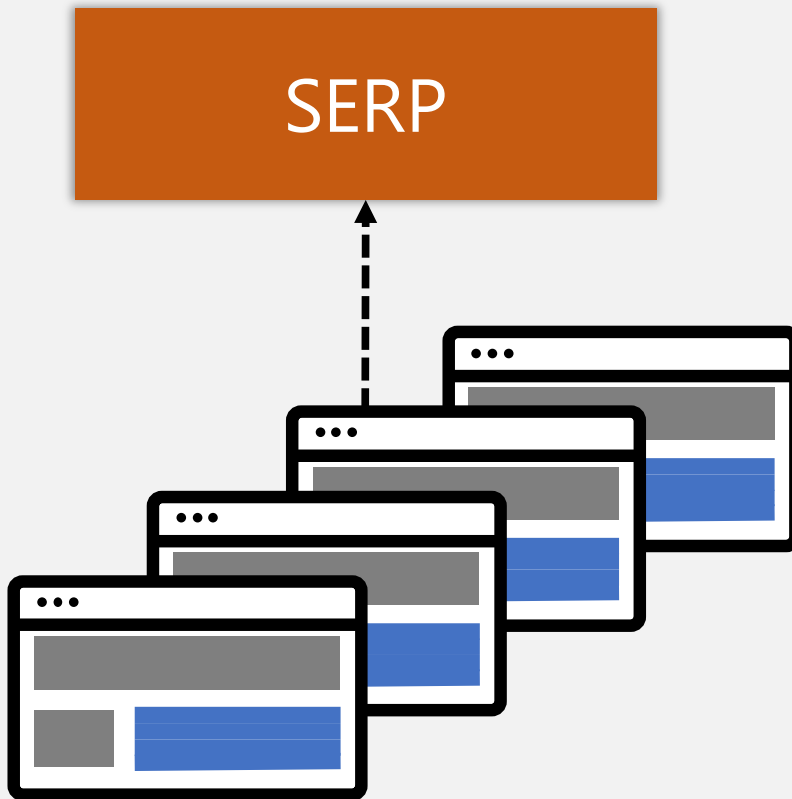
# How Does General Search Work?



Other Data



# How Does General Search Work?



Google

best suitcase for japan tavel

About 10,800,000 results (0.74 seconds)

Showing results for **best suitcase for japan travel**  
Search instead for **best suitcase for japan travl**

**Japanese Luggage Recommendations**

- Samsonite Winfield 2 Hardside Luggage with Spinner Wheels 20 Inch.
- Samsonite Omni PC Hardside Expandable Luggage with Spinner Wheels 24 Inch.
- Samsonite Solyte DLX Softside Expandable Luggage with Spinner Wheels 20 Inch.

[More items...](#)

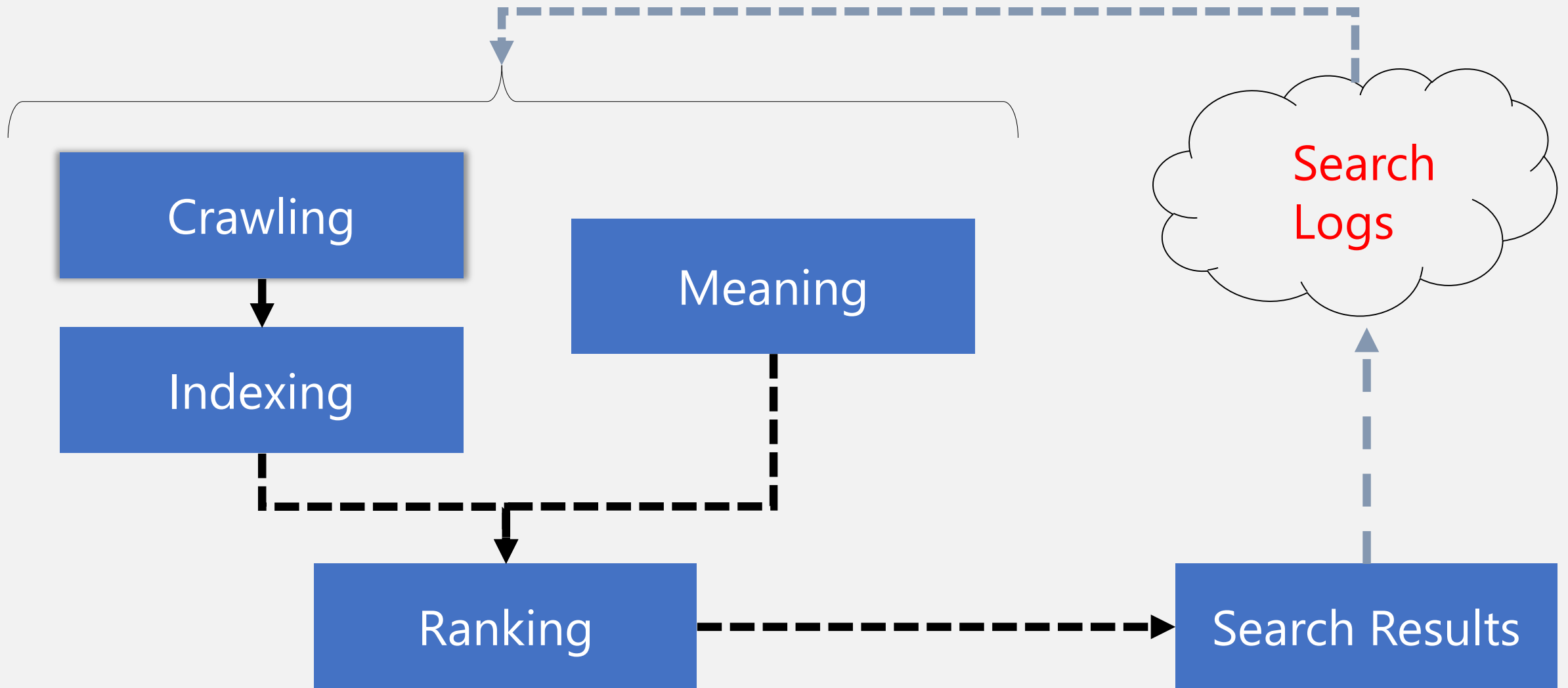
<https://www.pretraveller.com> › best-travel-bag-luggage-ja...  
**Best Travel Bag and Luggage for Your Japan Trip - Pretraveller**

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<https://sightseeandsushi.com> › Travel › Japan  
**Guide To Choosing The Best Bag For Traveling Japan**  
Nov 30, 2020 — The **best luggage for Japan travel** is the one that's easily carried, such as a backpack or a duffel bag. · Train stations in Japan have a lot of ...  
The worst type of Travel Bag to... · Best Travel Bags for Japan

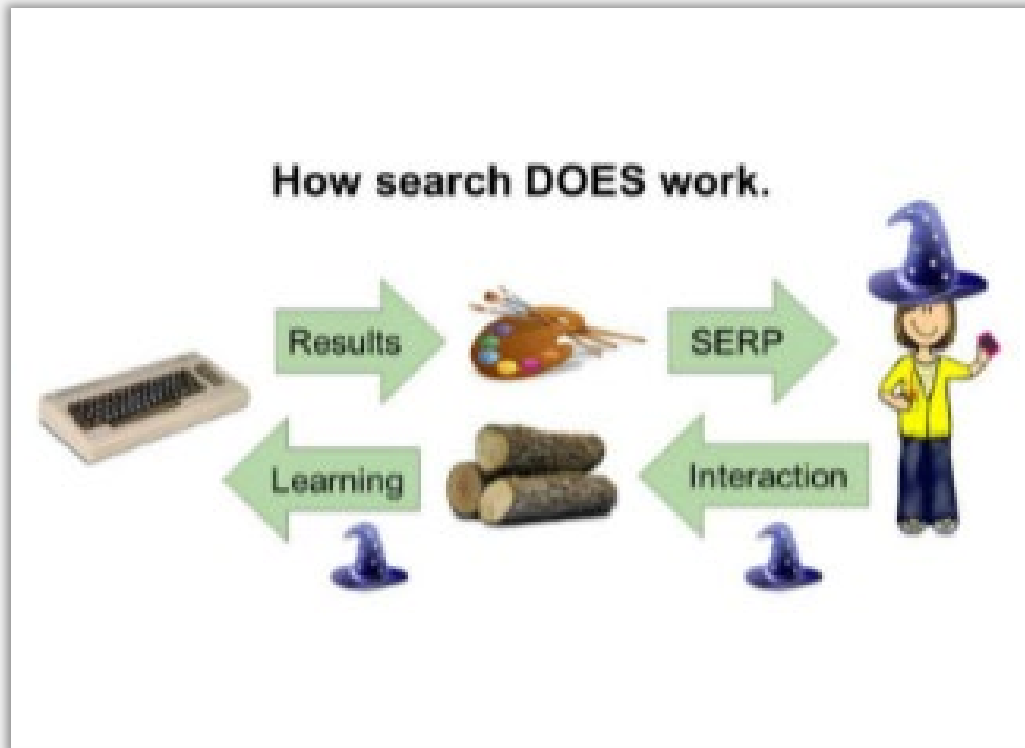


# How Does General Search Work?





# How Does General Search Work?



“The key is that there is a second flow of information in the reverse direction. As people interact with the search results page, their actions teach us about the world. For example, a click here means the image was better than the web result. A long look there means the KP was interesting. We log these actions, and then scoring teams learn from them.”





# General Search

## Queries

<b>Head</b>	Occur most frequently
-------------	-----------------------

<b>Torso</b>	Occur somewhat less frequently
--------------	--------------------------------

<b>Tail</b>	Occur only rarely
-------------	-------------------

# What is scale?



# What is Scale?



DuckDuckGo

yahoo!



[REDACTED]

One Year's Worth of Search Queries Based on Market Share



# What is Scale?



**[REDACTED]**



# Roadmap

1 General Search Industry Overview

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3 Search Distribution

4 Google's Search Distribution Contracts

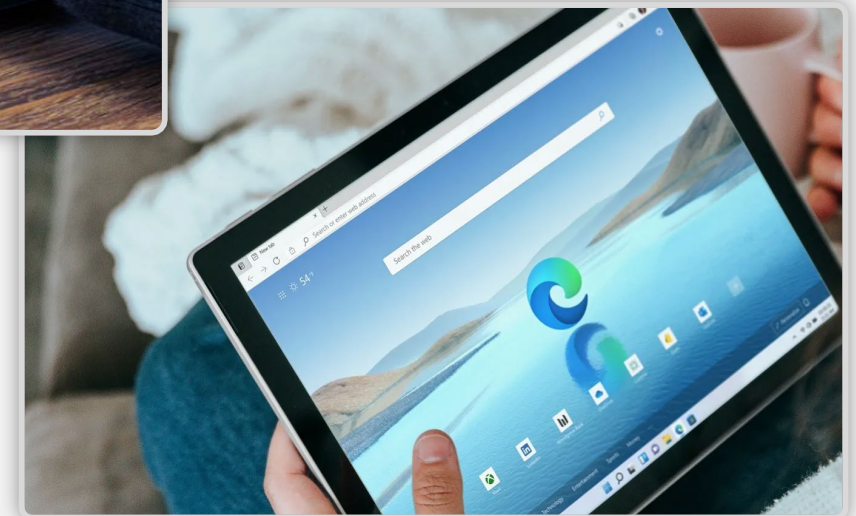
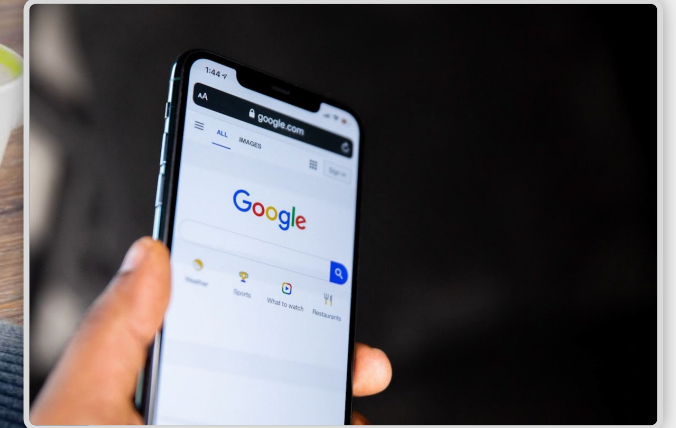
5 Search Advertising Industry Overview

How do consumers  
access general search?



# Search Distribution

## Accessing General Search



What is a search  
access point?



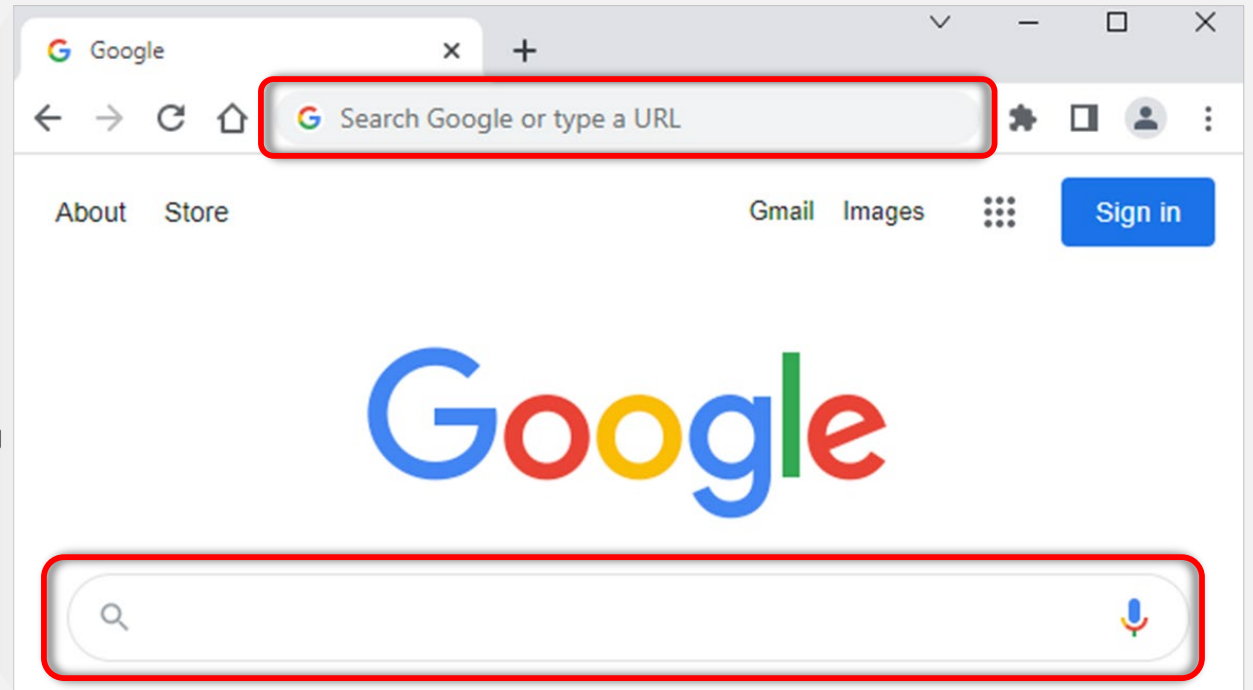
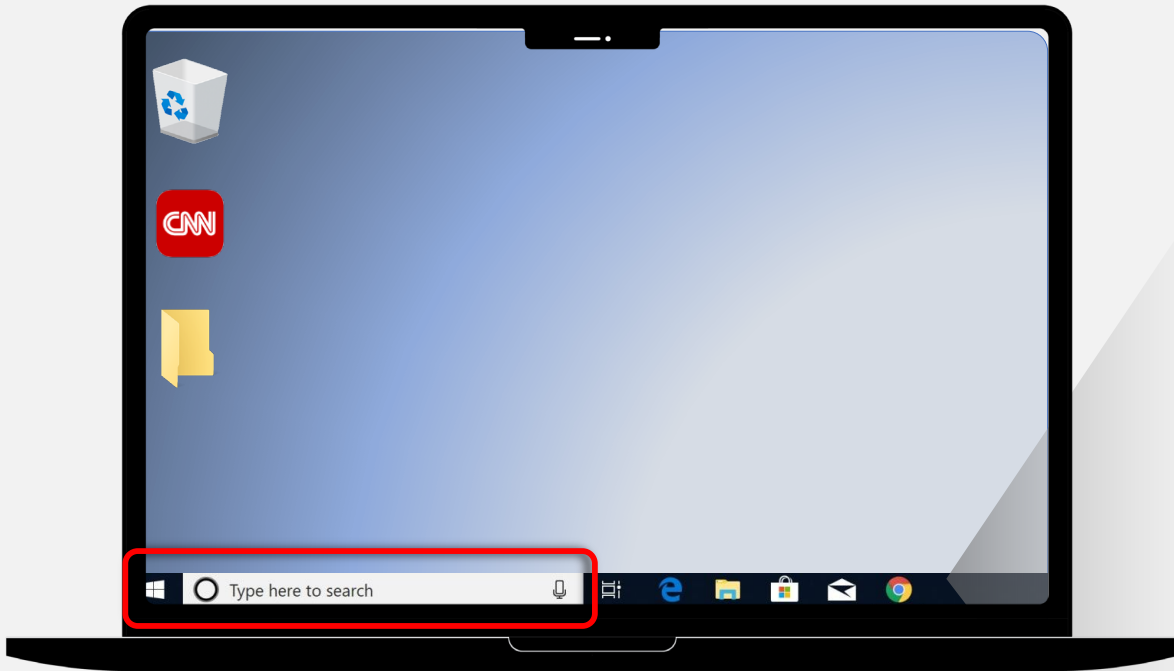


# Search Access Points

A search access point is a place on a computer or mobile device where a user can enter a query.

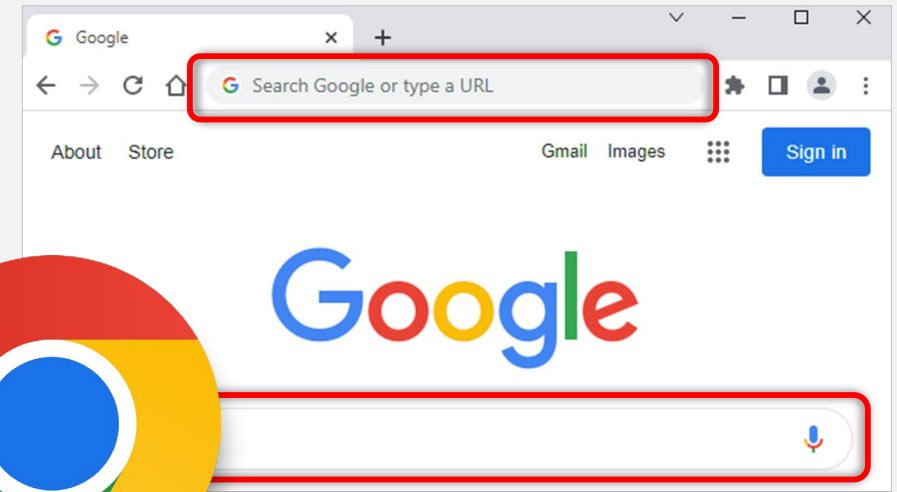
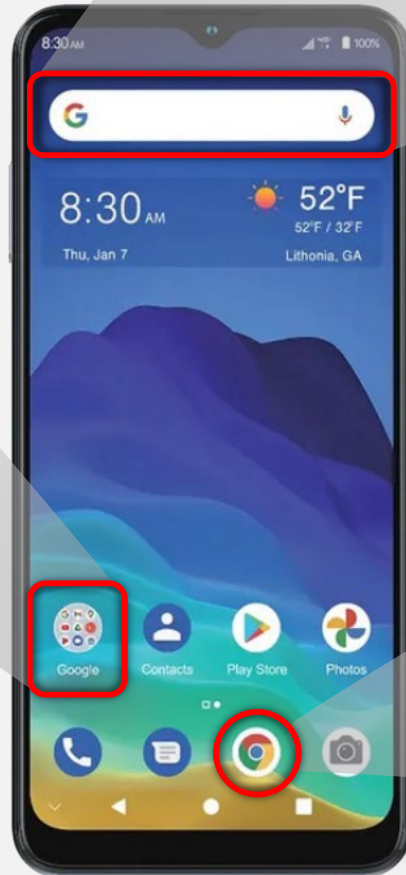
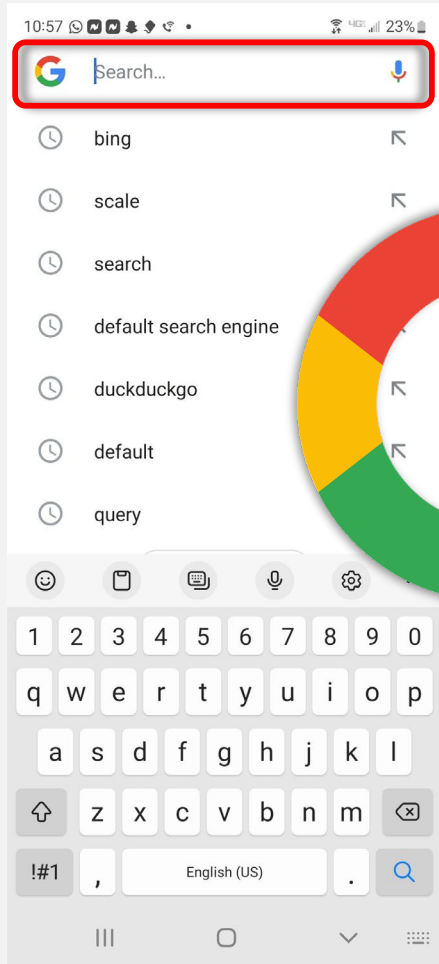


# Search Access Points





# Search Access Points



What is a default  
search engine?



# Default Search Engine

The search engine that a distributor programs a search access point to automatically send queries to out of the box.



# Defaults



Why are search  
defaults important?



# The Power of Defaults

“Default home page can be a powerful strategic weapon in the Search battle . . . . Could be an easy way to grow and defend market share for Google . . . .”





# The Power of Defaults

“tyranny of the default”

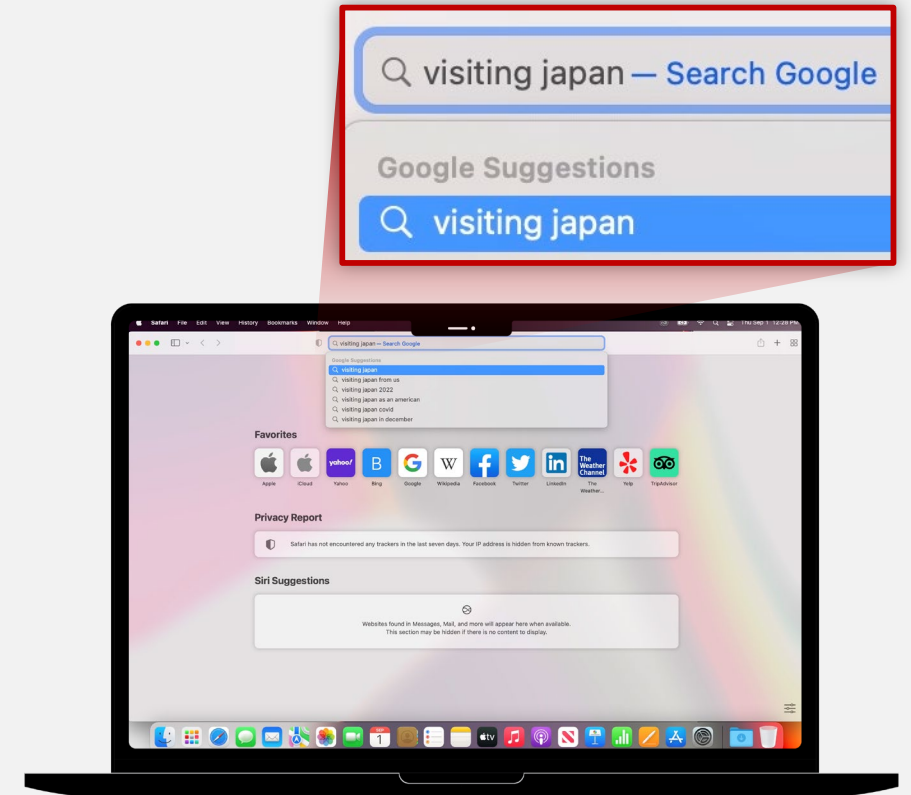
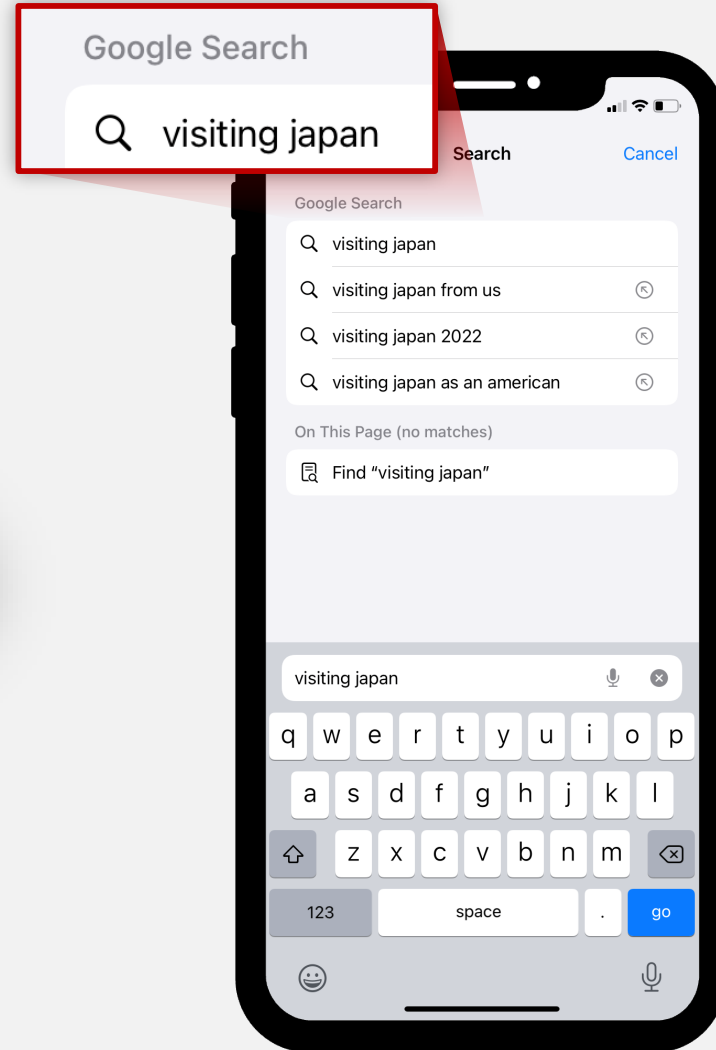
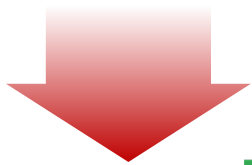
Which general search engines are defaults?



# Apple Search Defaults



macOS, iOS, iPadOS





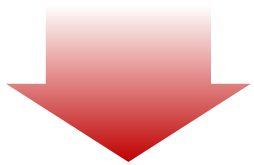
# Android Search Defaults



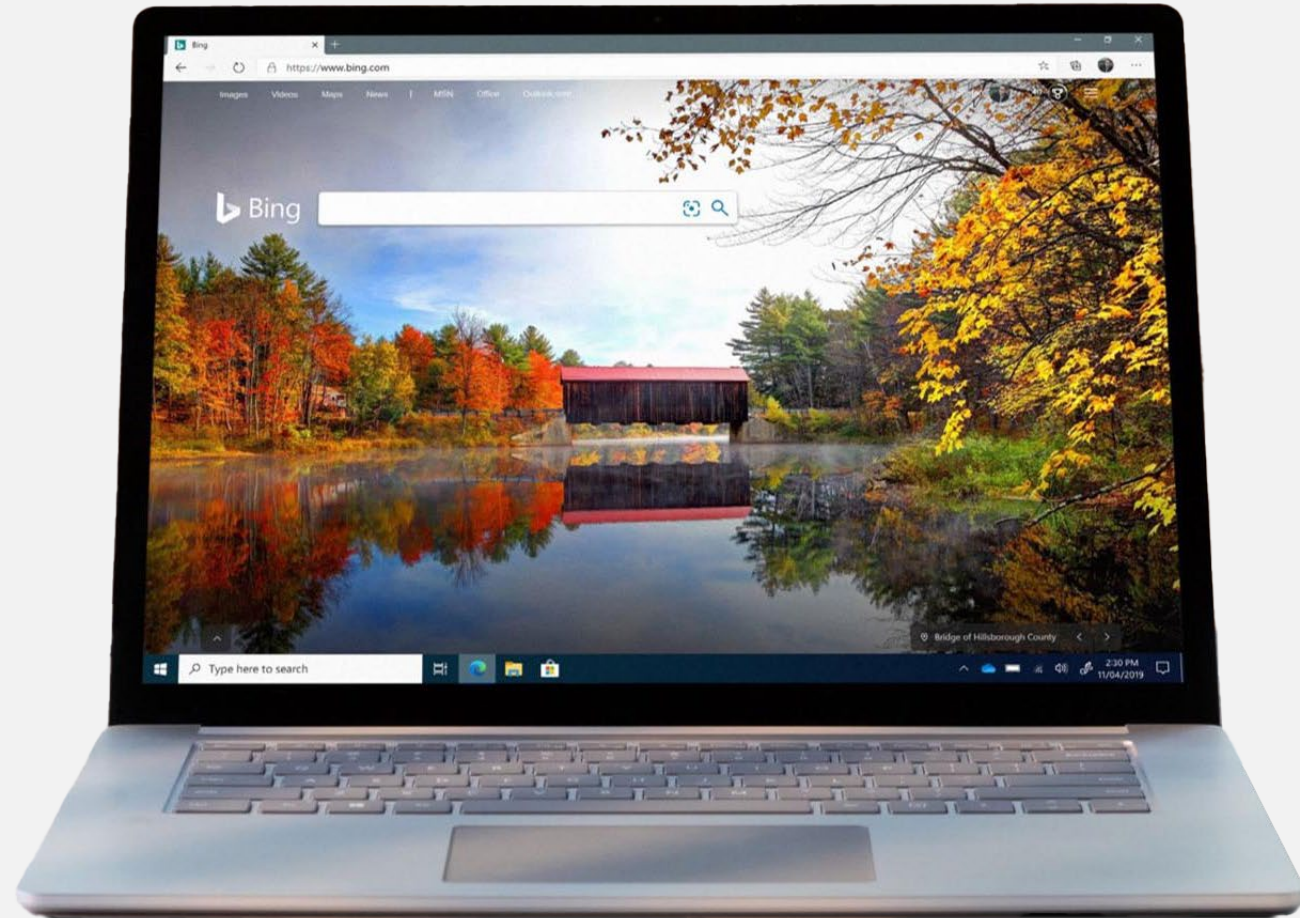


# Windows Search Defaults

 Windows



 Bing



What is a *user-selected*  
default search engine?



# User-Selected Default Search Engine

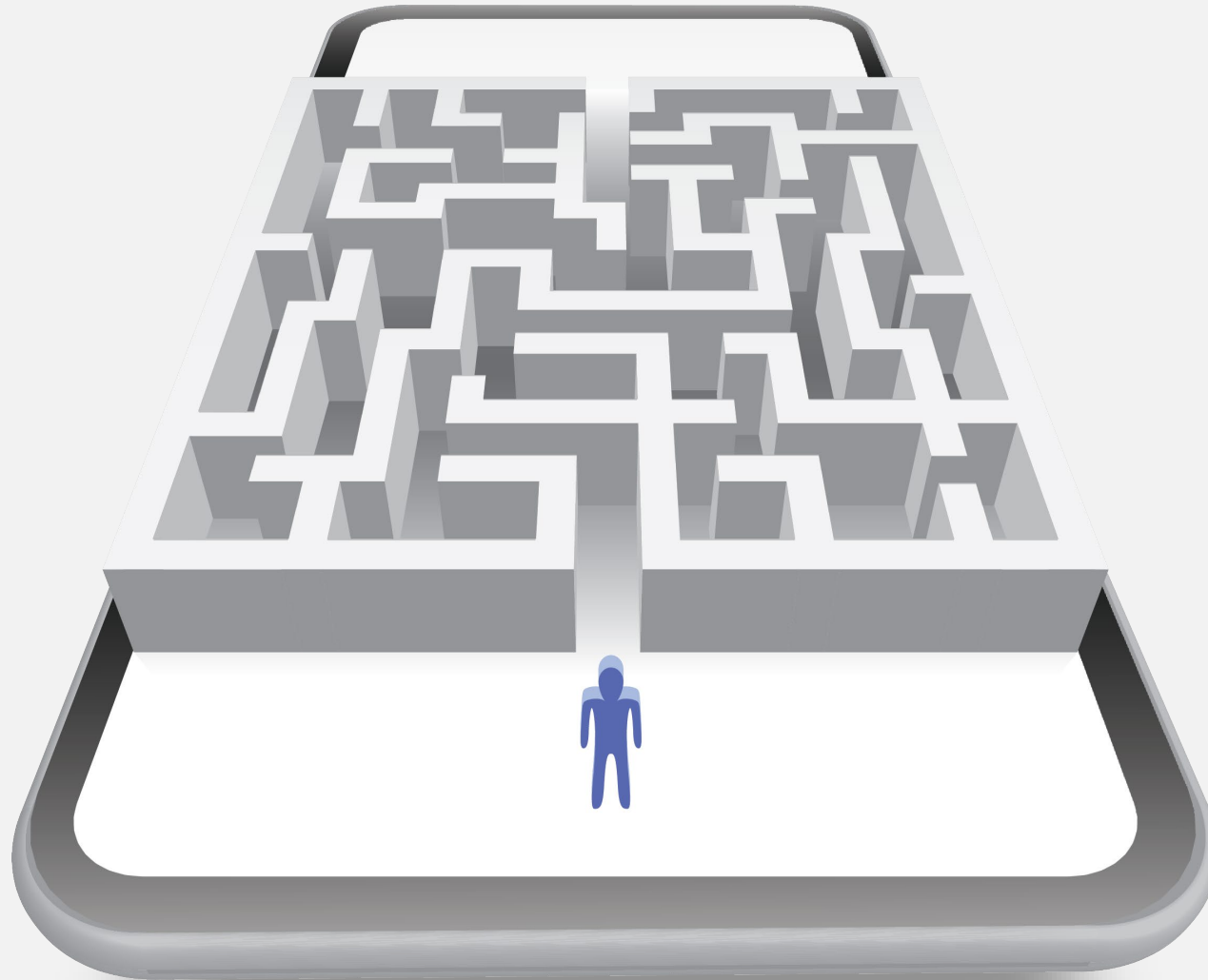
The search engine that a user sets a search access point to automatically send queries to.

How sticky are  
search defaults?





# The Power of Defaults





# The Power of Defaults

**Would you like to leave a tip?**

**Total: \$18.30** (\$15.00 + \$3.30 tip)

**22%**  
\$3.30

**20%**  
\$3.00

**15%**  
\$2.25

Custom tip

No tip

Sign here



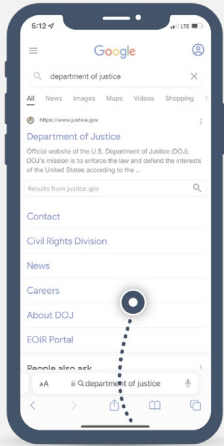
I agree to pay the above total amount according to my card issuer agreement. Card ending 0123. Reference code kywuPqxavTa. I understand my information will be processed pursuant to [Toast's Privacy Statement](#) and direct Toast to share my information with the merchant.

**Continue**



# The Power of Defaults

Step 1



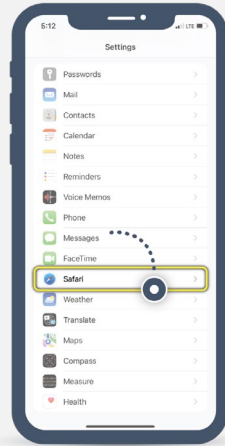
Leave browser app

Step 2



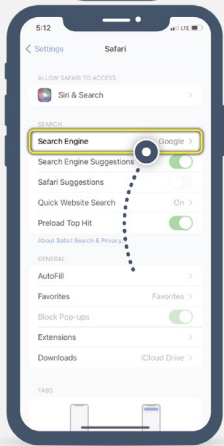
Open Settings app

Step 3



Scroll to locate Safari tab

Step 4



Tap on Search Engine option

Step 5

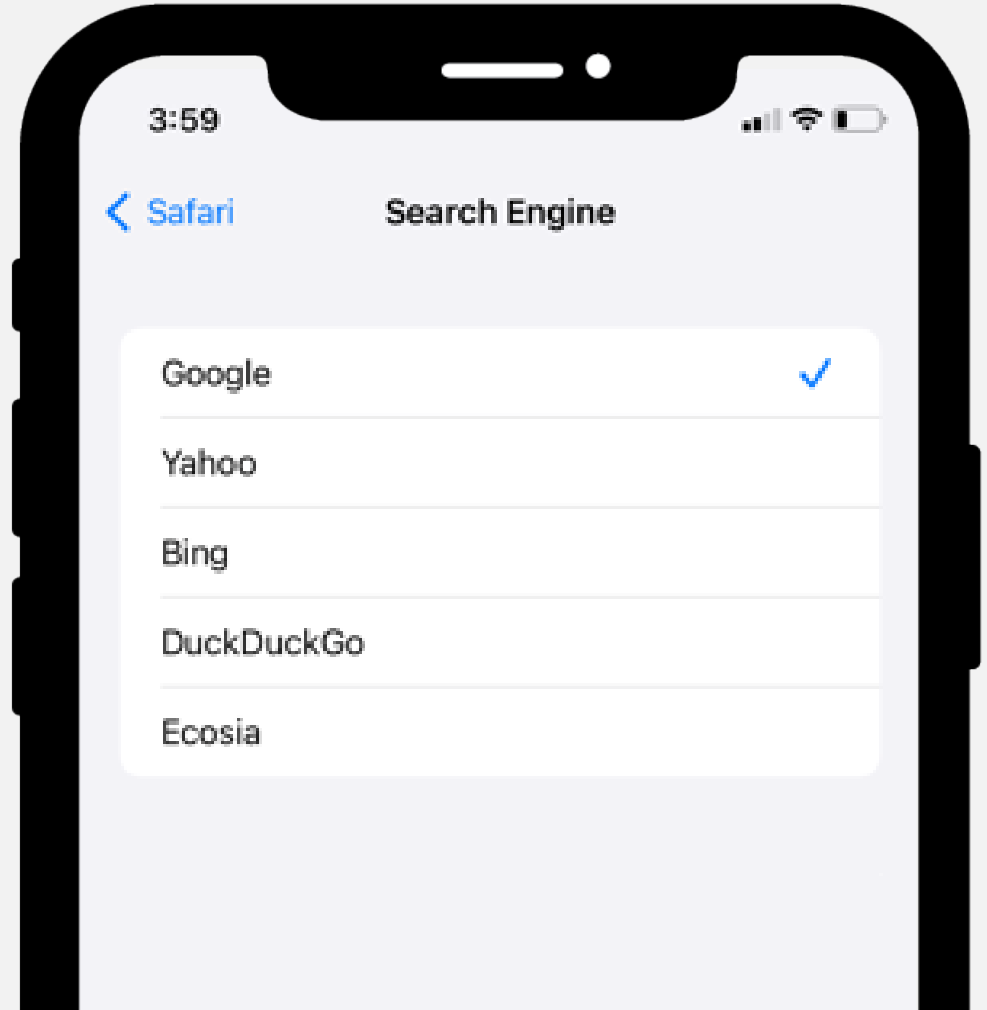


Select desired search engine

Step 6



Navigate back to Safari app



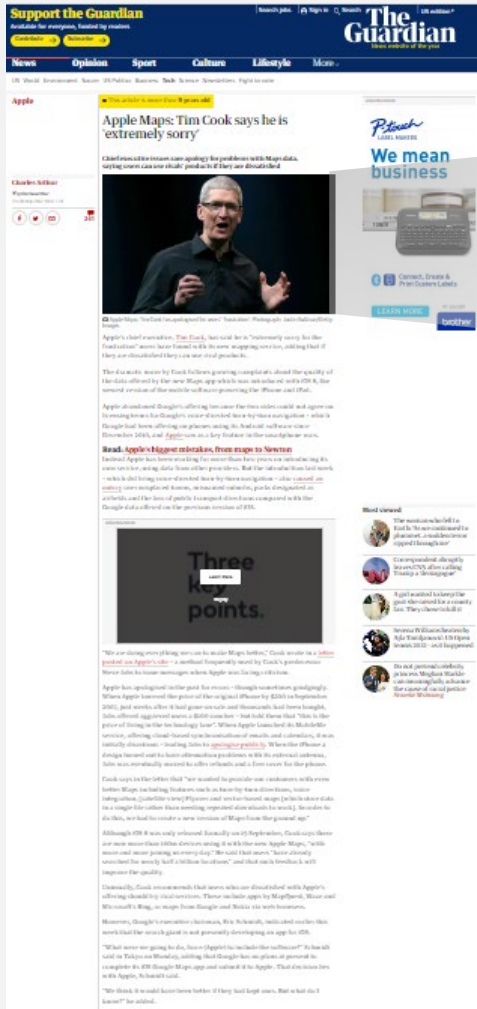


# The Power of Defaults





# The Power of Defaults



## Apple Maps: Tim Cook says he is 'extremely sorry'

Chief executive issues rare apology for problems with Maps data, saying users can use rivals' products if they are dissatisfied





# The Power of Defaults

## Default Search Recover Assumptions

**[REDACTED]**



# Roadmap

- 1 General Search Industry Overview
- 2 General Search Mechanics
- 3 Search Distribution
- 4 Google's Search Distribution Contracts**
- 5 Search Advertising Industry Overview

How is Google the  
exclusive default search  
engine on Apple?





# Apple





# Timeline of Events

2003

Google at ~30%

2005

Google begins to pay for search default on Apple

2007

Apple iPhone launch

2008

DuckDuckGo enters

2003

2004

2005

2006

2007

2008



# Apple





# Apple



- Q.** And why are GSA and Chrome not preinstalled on Apple mobile devices?
- A.** **We don't install any third-party apps. Never have on iOS.**
- Q.** . . . [S]ince 2007, Apple has never preinstalled or preloaded any third-party applications on an iPhone, correct?
- A.** That's correct.
- Q.** What type of value would Apple require if it decided that it was going to . . . preload third-party applications on iPhones? . . .
- A.** There is none. We would never do it.

How is Google the  
exclusive default search  
engine on Android?



# Android





# Timeline of Events

2003

Google at ~30%

2005

- Google begins to pay for search default on Apple
- **Google acquires Android OS**

2007

- Apple iPhone launch
- **Google launches AOSP**

2008

- DuckDuckGo enters
- **First Android phone sold in US**

2009

- Microsoft-Yahoo! syndication deal
- Google at 80%+

2003

2004

2005

2006

2007

2008

2009



# Android

**“[REDACTED]”**

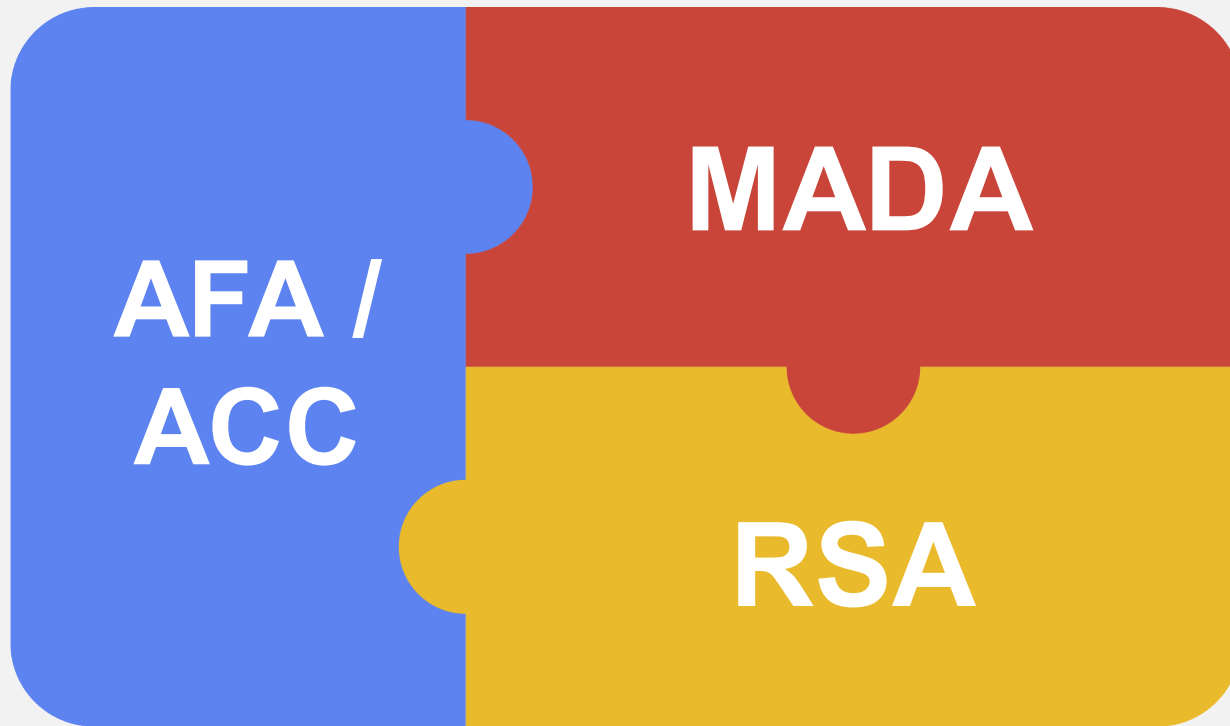
**[REDACTED]**





# Android Distribution Contracts

Google





# Android Distribution Contracts

## Google's Android Distribution Partners

Original Equipment  
Manufacturers  
(OEMs)

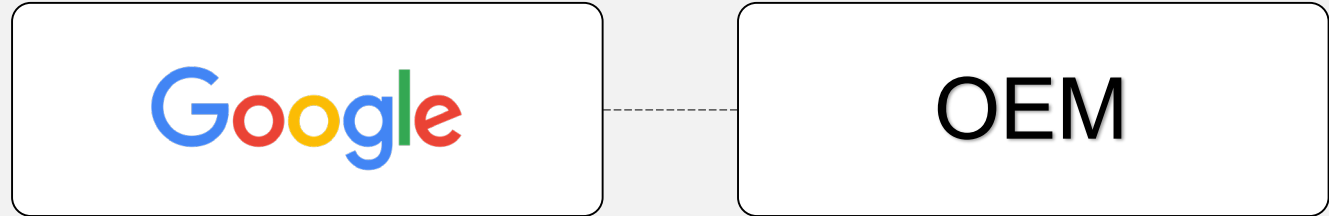


Mobile Network  
Operators (MNOs)





# Android Distribution Contracts

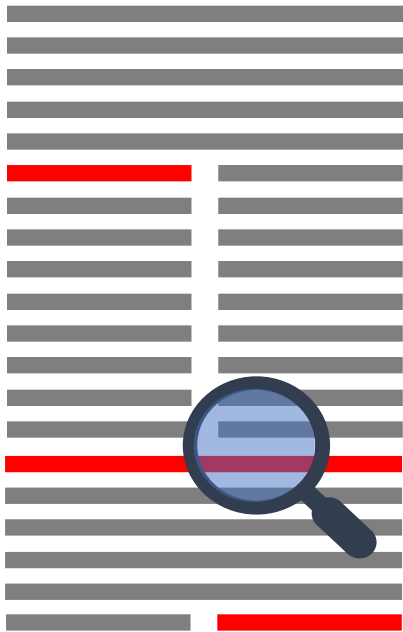


- Anti-Fragmentation Agreement
- Android Compatibility Commitment



# Android Distribution Contracts

## AFA/ACC

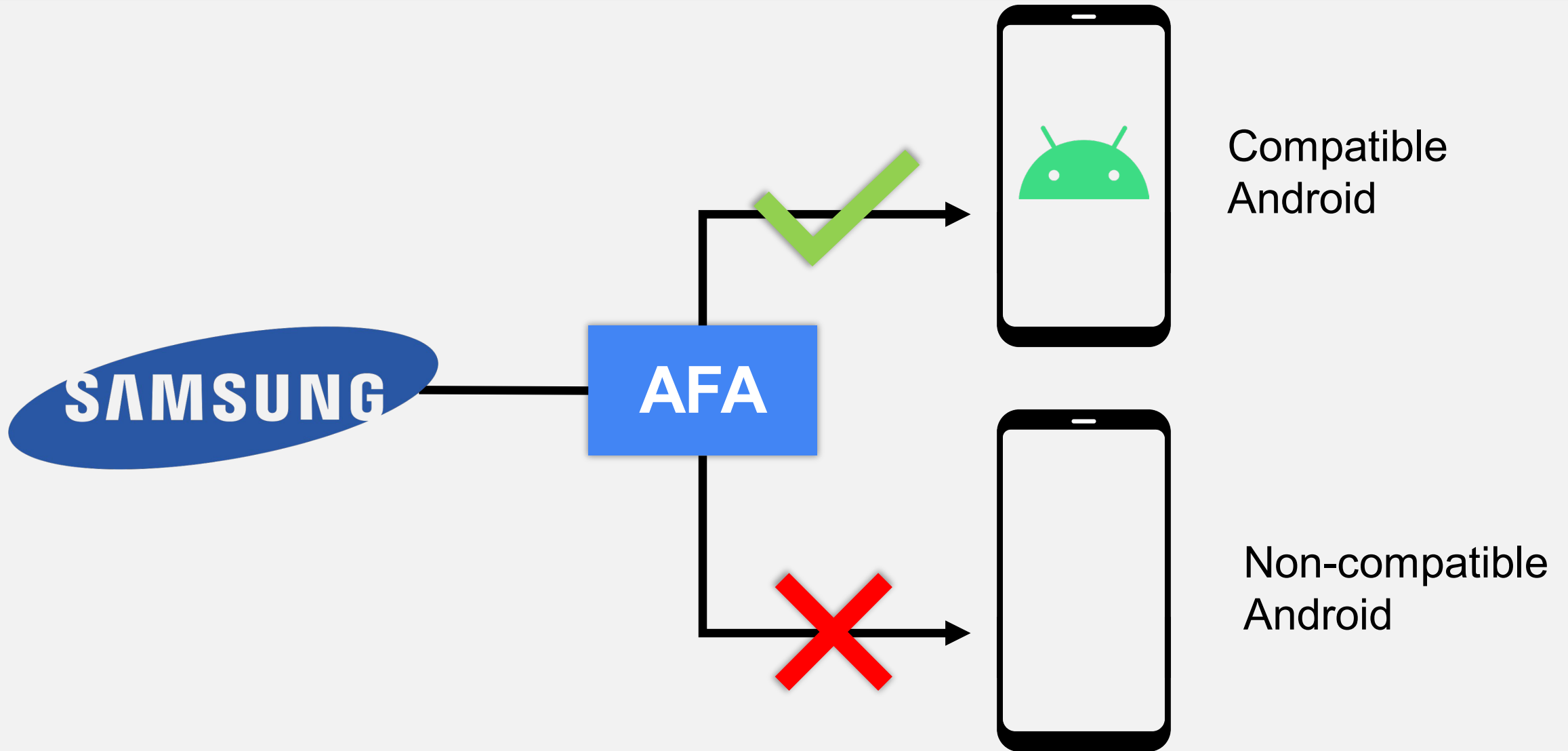


## WHAT DO THEY PROVIDE?

- OEMs only make/sell compatible Android devices
- Google must approve devices
- Prohibits “fragmentation” of Android (AFAs)



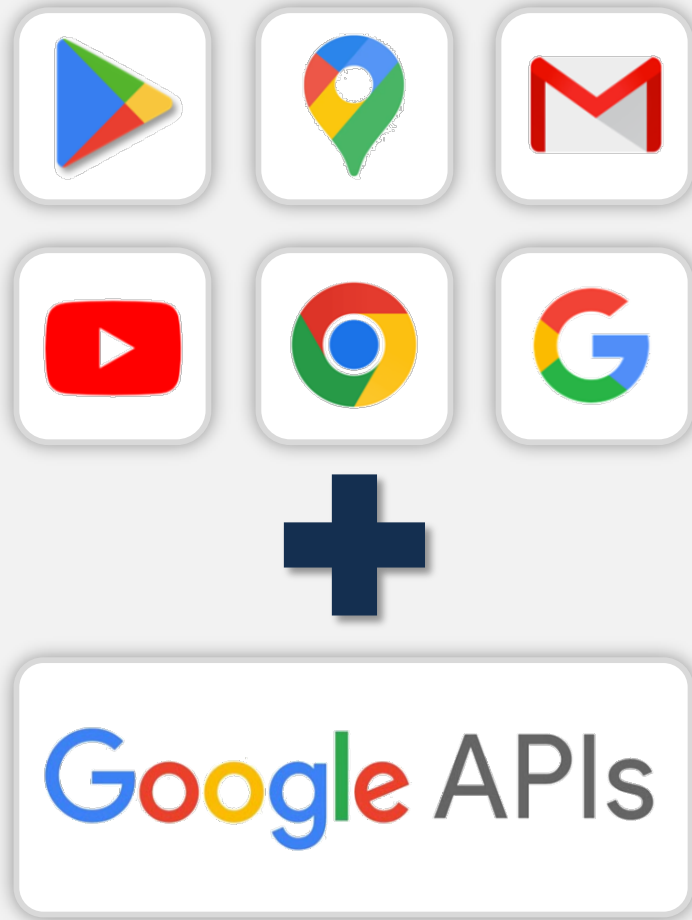
# Android Distribution Contracts





# Android

## Google Mobile Services (GMS)



- Google proprietary apps
  - Google Search App
  - Chrome
  - Google Play
  - Google Maps
  - YouTube
  - Gmail
- Google proprietary APIs



# Android



## Google Play Store

- Google's proprietary app store
- Largest Android app collection
- Proprietary APIs



# Android

## Google Search App



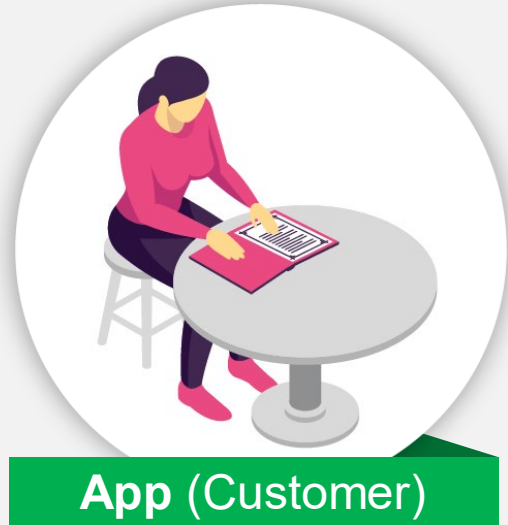
## Google Search Widget



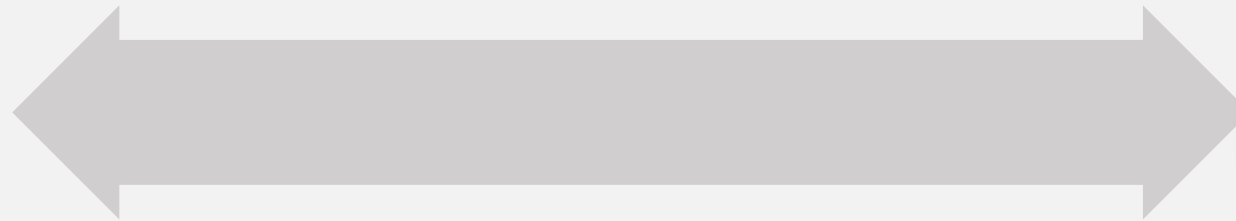




# Android

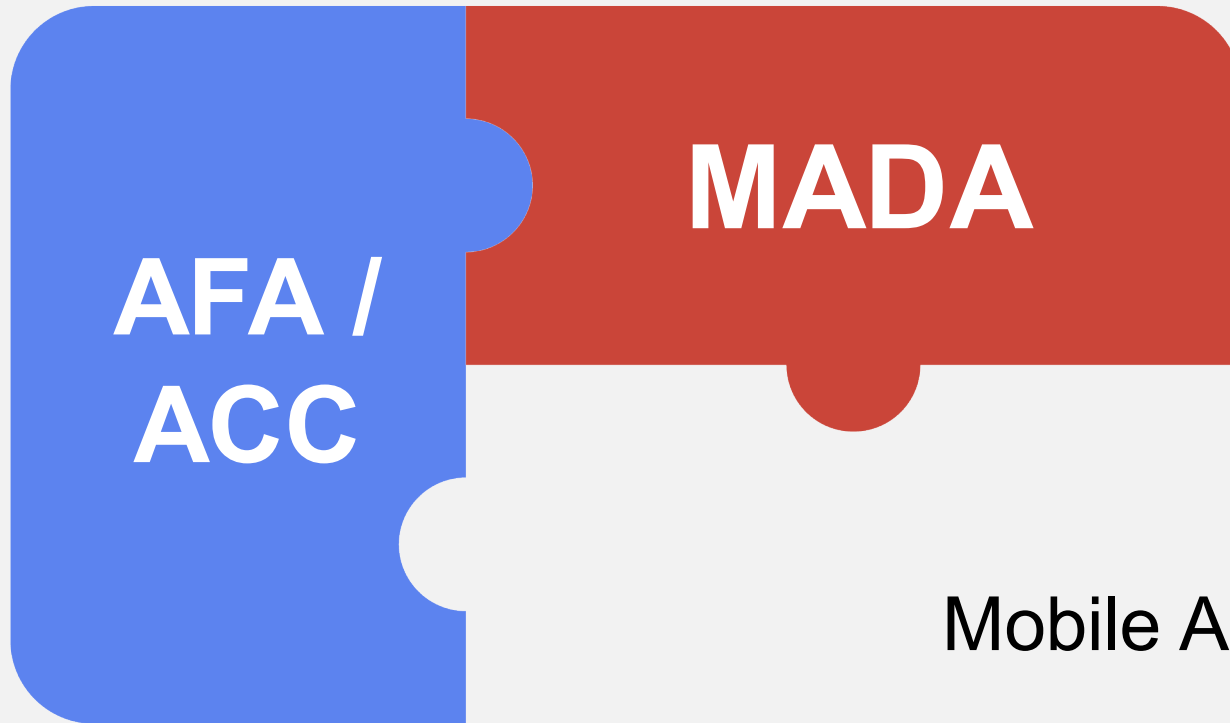


Google APIs

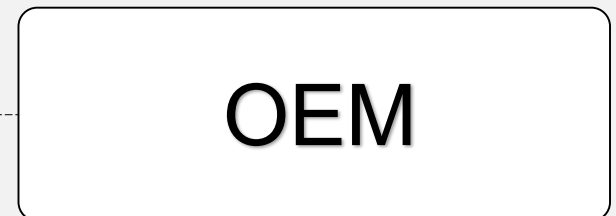




# Android Distribution Contracts



Mobile Application Distribution Agreement





# Android Distribution Contracts



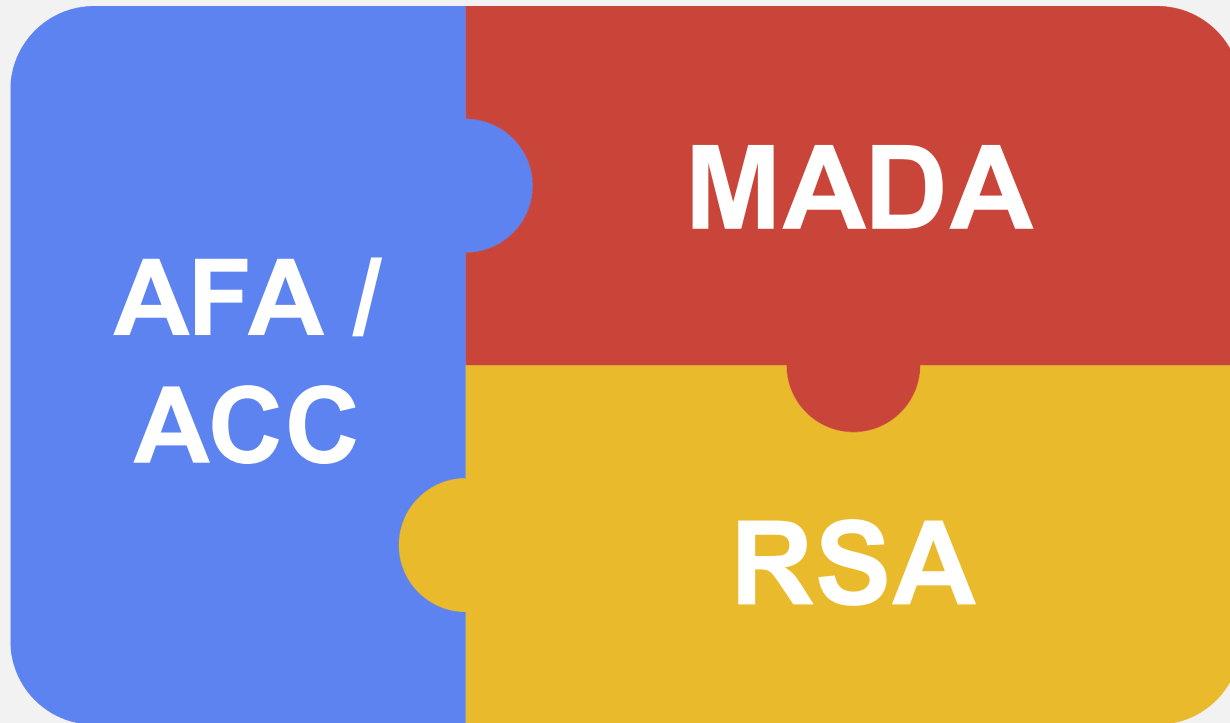
## MADA

### WHAT DOES IT PROVIDE?

- A GMS license
- If the OEM preinstalls *any* Google app, the OEM **must**:
  - preinstall a suite of Google apps
  - give apps prominent placement, e.g., Google Search widget on the home screen
  - make 6 core apps undeletable



# Android Distribution Contracts

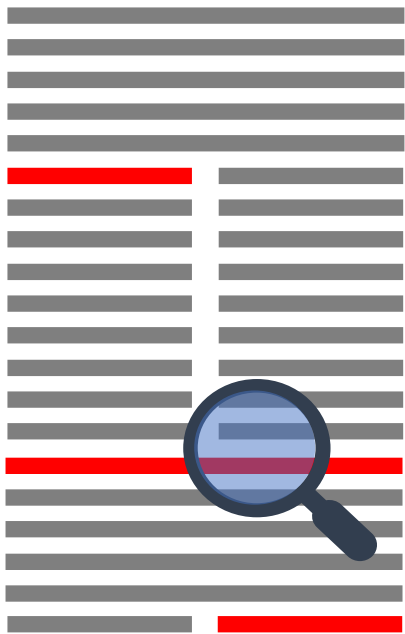


Revenue Share  
Agreement



# Android Distribution Contracts

RSA



## WHAT DOES IT PROVIDE?

For a share of search ad revenue, MNO/OEM must:

- make Google exclusive search default
- install search-related Google apps with prominent placement
- exclude “alternative search services”



# RSA Payments

Google payments under RSAs by partner type (US)

**[REDACTED]**



# Android Distribution Contracts





# Defaults



**Sundar Pichai**  
Google CEO

**Q.** And Google pays rev share on a specific device type if it gets exclusivity on default out of the box, right?

**A.** That's my understanding, yes.



Is Google the exclusive  
default search on other  
browsers?



# Browsers



Samsung  
Internet



Mozilla  
Firefox



UCBrowser



Opera



Puffin



# Browsers





# Timeline of Events

2007

- Apple iPhone launch
- Google launches AOSP

2008

- DuckDuckGo enters
- First Android phone sold in US
- **Chrome launches on PC**

2009

- Microsoft-Yahoo! syndication deal
- Google at 80%+

2010

- Ask.com exits independent
- Yahoo! exits independent

2012

**Chrome launches on mobile**

2013

AltaVista exits

2007

2008

2009

2010

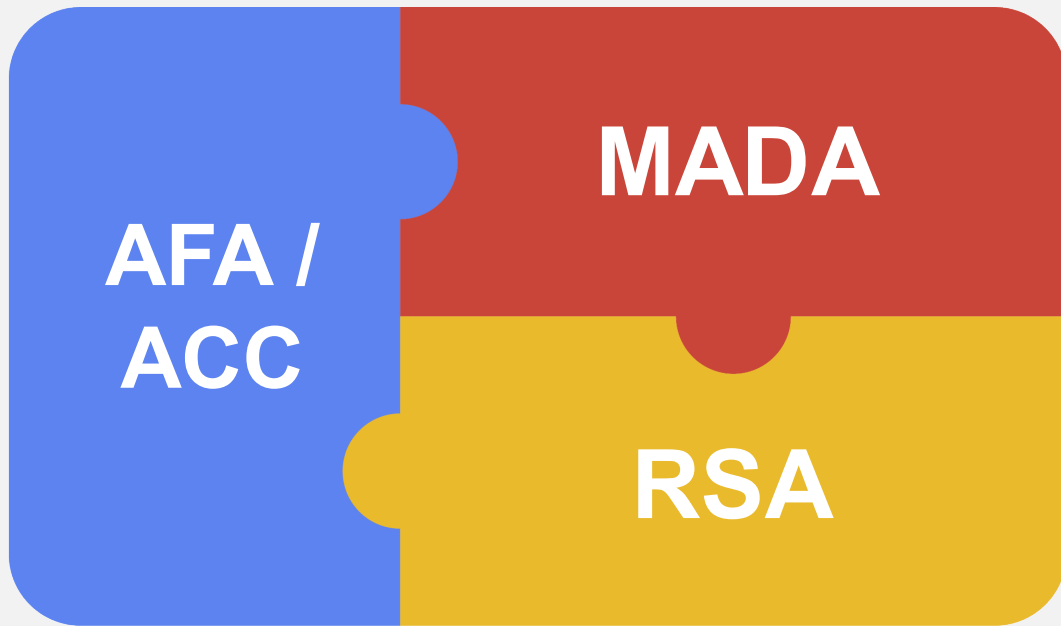
2011

2012

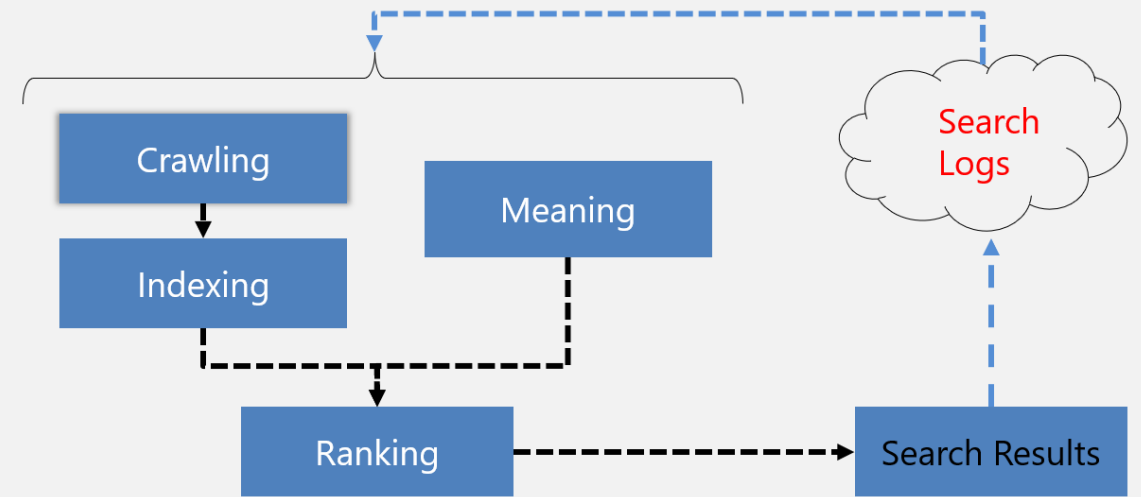
2013



# General Search



Distribution Contracts



Search Mechanics



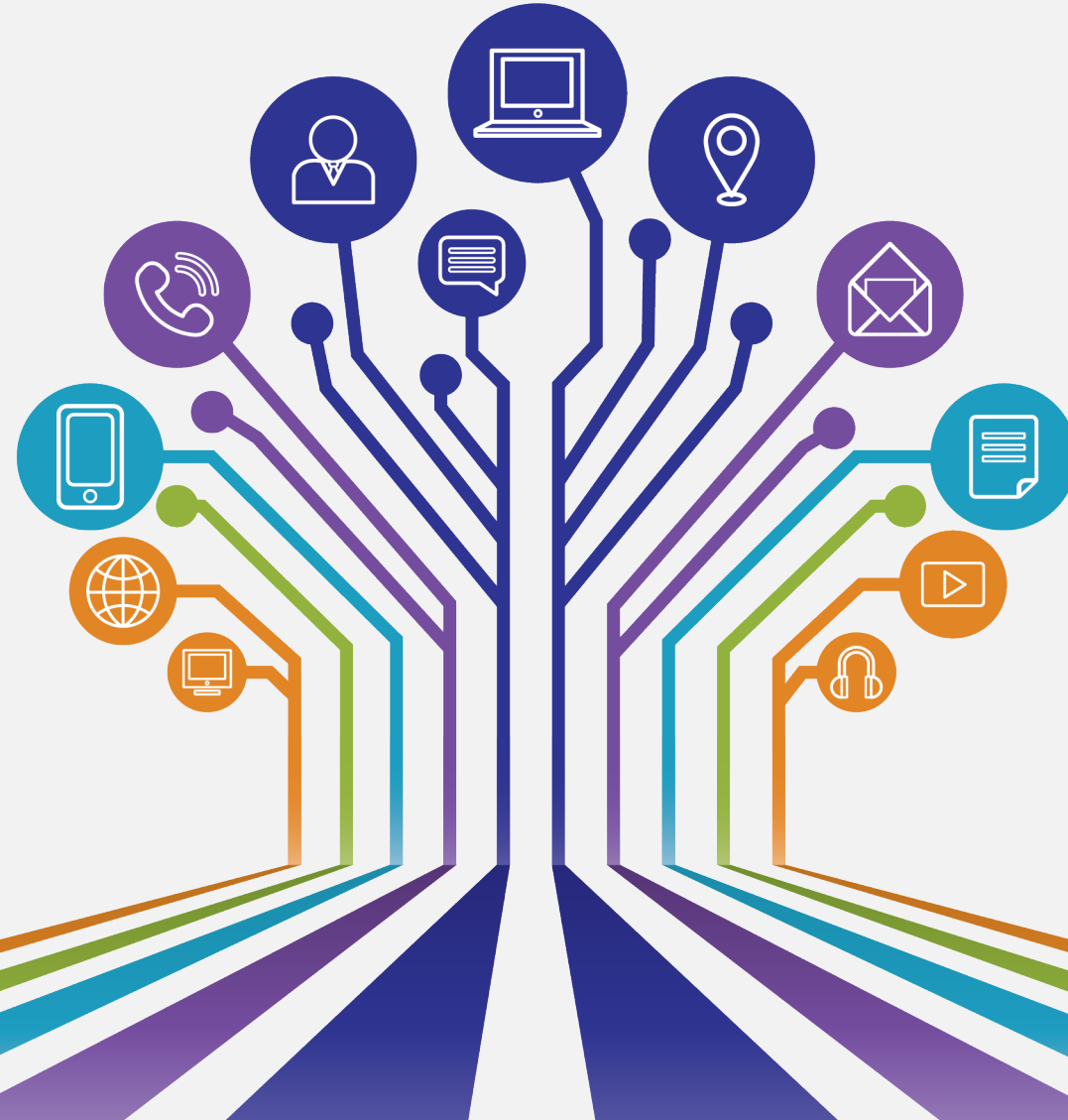
# Roadmap

- 1 General Search Industry Overview
- 2 General Search Mechanics
- 3 Search Distribution
- 4 Google's Search Distribution Contracts
- 5 Search Advertising Industry Overview

# What is advertising?



# Advertising Channels



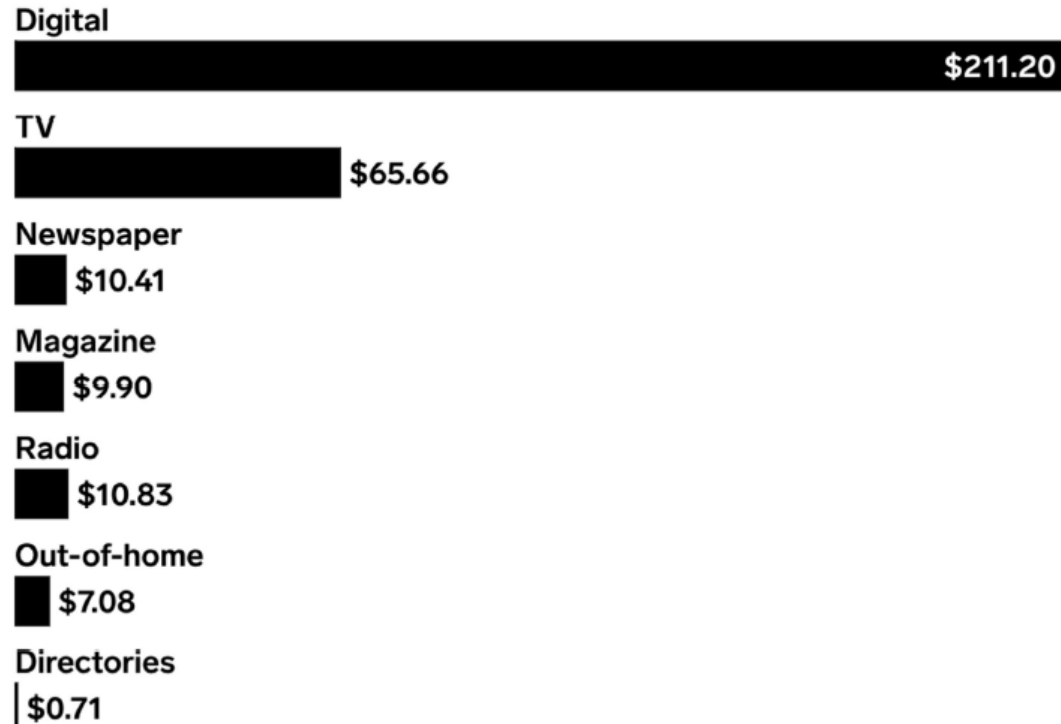




# Advertising Channels

## Total Media Ad Spending, by Media

US, 2021, billions

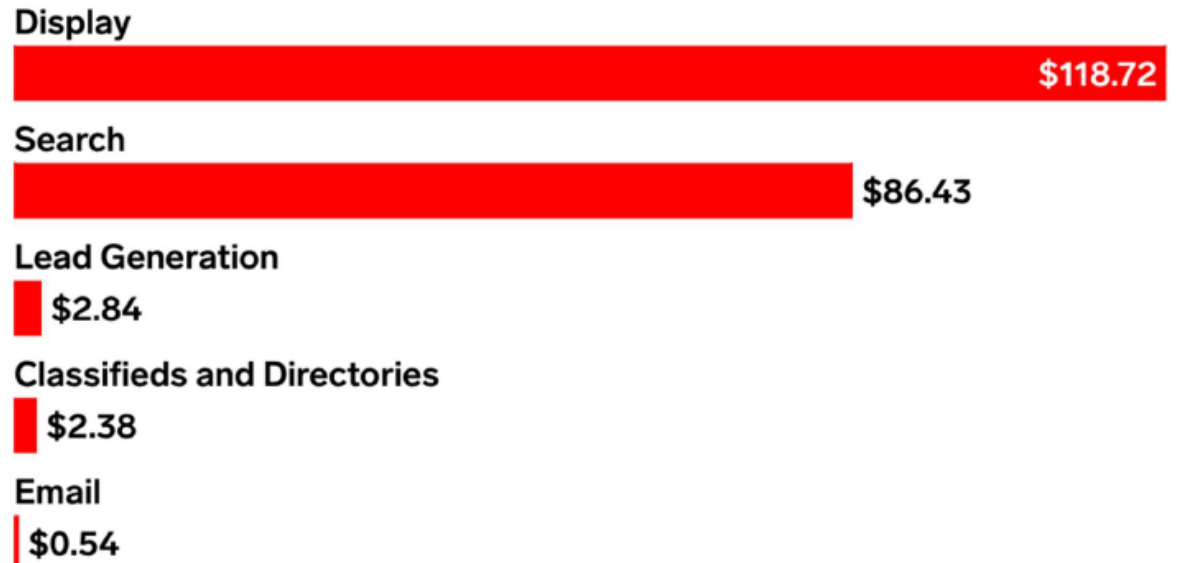


Source: eMarketer, March 2022

eMarketer | [InsiderIntelligence.com](https://www.insiderintelligence.com)

## Digital Ad Spending, by Format

US, 2021, billions



Source: eMarketer, March 2022

eMarketer | [InsiderIntelligence.com](https://www.insiderintelligence.com)

What advertising markets  
do the US Plaintiffs  
allege?



# Search Ads

## Markets Alleged

### **General Search Text Ads (Text Ads):**

Ads consisting primarily of text and appearing on a general search engine's results page in response to a real-time query.



# Text Ads

Google kids sneakers

All Shopping Images Maps News More Tools

About 1,880,000,000 results (0.78 seconds)

**Ad** · <https://www.nike.com/> ·

**Nike® Kids' Shoes - Nike Kids' Shoes**

Shoes For All Your Young Athletes' Needs And Designed With Comfort And Mobility In Mind. Durable, Comfortable Support For Your Growing Athletes. Shop...

[Nike's Parenting Playbook](#) · [Sale - Up to 40% Off](#) · [Shop Nike Back To School](#) · [Kids' Sale](#)

**Ad** · <https://www.asics.com/> ·

**Afterpay Now Available - Best Kids Shoes**

Shop ASICS Today For The Best Kids Shoes Selection at The Official Online Store Today. Shop the Official Online Store for the Largest Selection. Free Returns.

**Ad** · <https://www.rothys.com/> ·

**Kids & Toddler Slip-On Sneakers | Washable & Comfortable |...**

From Standout Shoes To Beautiful Bags, Shop Styles That Feel Just As Good As They Look. These Colorful, Contemporary Classics Are Meant To Accompany You Absolutely...

**Ad** · <https://www.skechers.com/> ·

**Kids Sneakers by SKECHERS® - New Sneaker Styles for Kids**

Shop Our Huge Selection of Fun Colors & Styles that Kids Love. Every Kid Deserves a Pair of SKECHERS® Sneakers. Shop Kids Sneakers Now. Member Exclusive Deals. Easy Online Checkout. Free Returns. Machine Washable Styles. Style & Comfort.

[Buy Now, Pay Later](#) · [Dr. Seuss x SKECHERS®](#) · [SKECHERS® Kid's Foamies](#) · [Light Up Shoes](#)



# Search Ads

## Markets Alleged

### **General Search Text Ads (Text Ads):**

Ads consisting primarily of text and appearing on a general search engine's results page in response to a real-time query.

### **Search Ads:**

Any ads appearing on any search engine's results page in response to consumer's real-time query (including Text Ads).



# Search Ads

Text Ads →

The screenshot shows a Google search for "lego sets". The search bar at the top contains "lego sets" and the Google logo. Below the search bar, there are navigation tabs for "All", "Shopping", "Images", "News", "Videos", and "More". The search results are categorized into "Text Ads" and "Shopping Ads".

**Text Ads:**

- Ad - https://www.stockx.com/**  
**StockX: Access the Now - Rare Lego Products**  
StockX is the top-rated site to buy & sell authenticated Lego collectibles. Shop today. Buy...  
**Lego**  
Browse exclusive Lego collectibles on StockX today.  
**Buying Guide**  
Everything you need to know about buying on StockX.  
**How It Works**  
StockX is here to guide you through the resale process.
- Ad - https://www.lego.com/**  
**The Official LEGO® Shop - The Largest LEGO® Selection**  
Explore new and exclusive sets from LEGO.com & get free shipping on orders \$35+. Shop now!  
See what's new from LEGO®! Shop the largest selection & get free shipping on...  
LEGO® Sets for Adults · Shop the New 2022 Sets · LEGO® Sonic the Hedgehog™
- Ad - https://www.amazon.com/**  
**Shop Lego Complete Set - Amazon.com® Official Site**  
Find deals and compare prices on lego complete set at Amazon.com. Shop by age...  
Rating for amazon.com: 4.5 - 3,893 reviews - Order accuracy: 95–100%

**Shopping Ads:**

- Ad - Shop lego sets**
- LEGO - Succulents...**  
\$49.99  
Amazon.com  
Free shipping
- LEGO - Lion Knights'...**  
\$399.99  
LEGO.com  
Free shipping
- QLT Flower House...**  
\$29.59  
Amazon.com  
Free shipping
- LEGO - Architecture...**  
\$48.34  
Amazon.com
- LEGO - Colosseum**  
\$549.99  
LEGO.com  
(185)
- LEGO - Ideas Tree House...**  
\$194.89  
Amazon.com  
Free shipping
- LEGO - Succulents...**  
\$49.99  
Target  
(38)
- LEGO - Flower...**  
\$53.98  
Amazon.com  
Free shipping
- LEGO - Orchid 1031...**  
\$47.00  
Amazon.com  
Free shipping

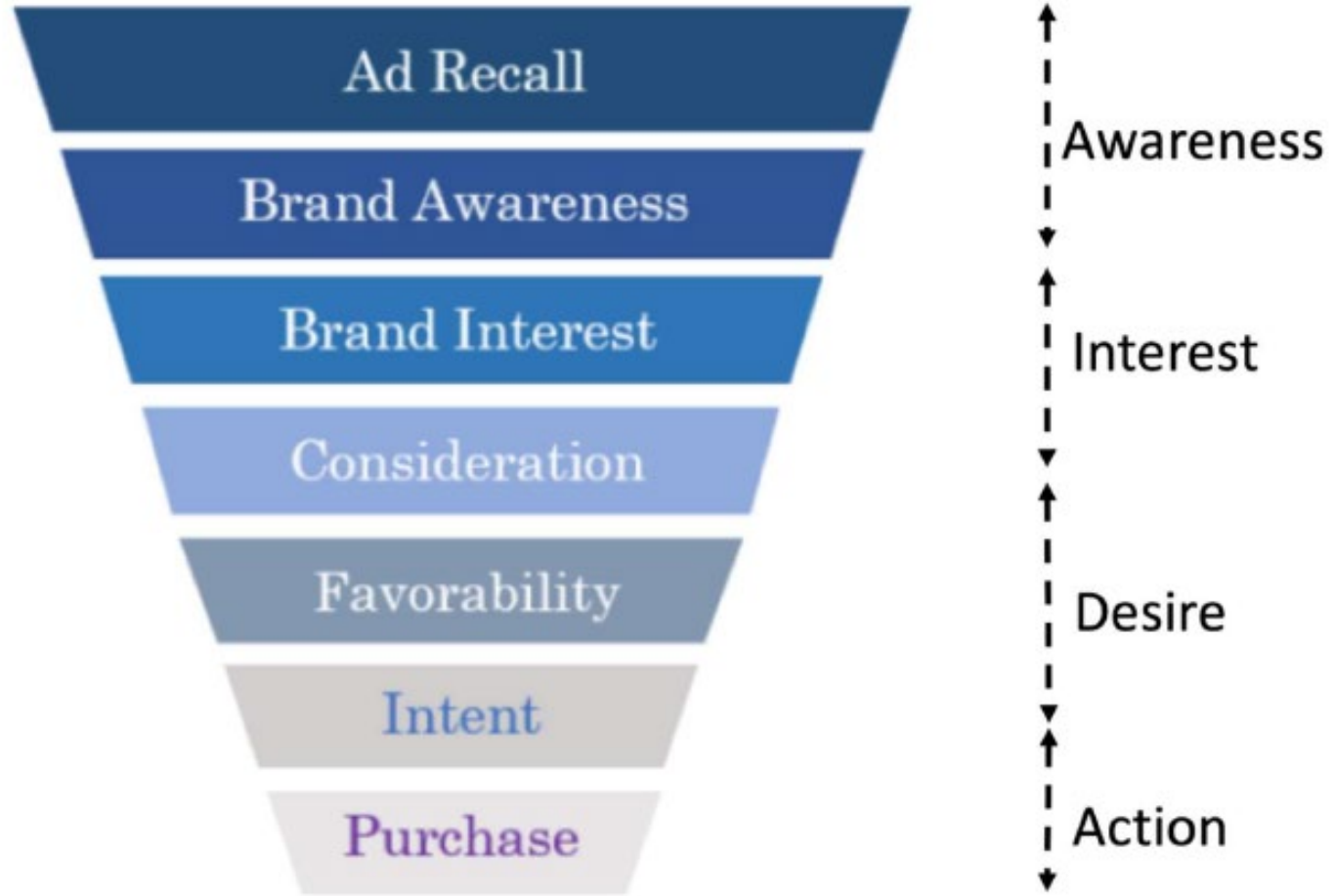
→ Shopping Ads

What channels do  
advertisers use and why?



# The Consumer Purchase Funnel

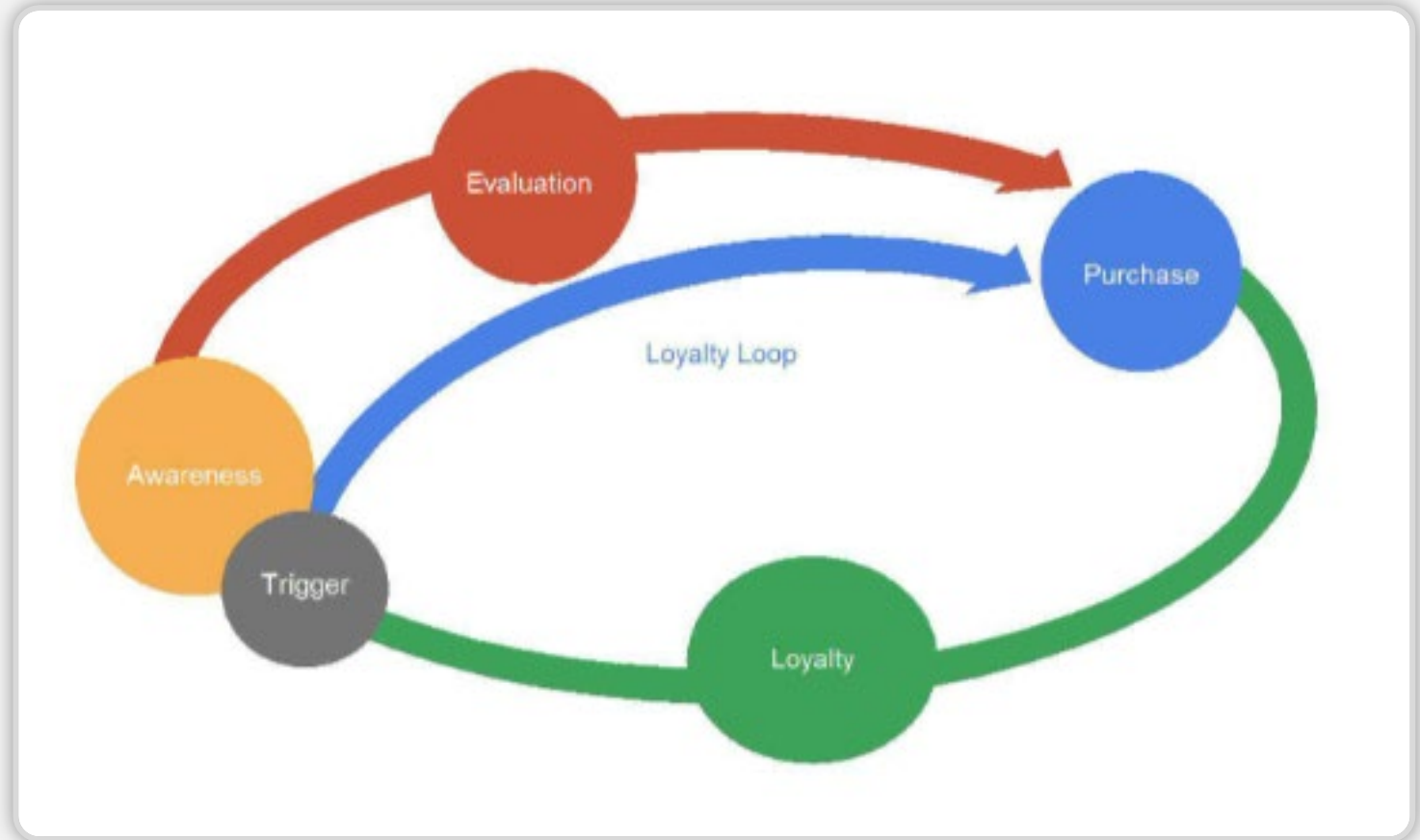
## The Consumer Purchase Funnel





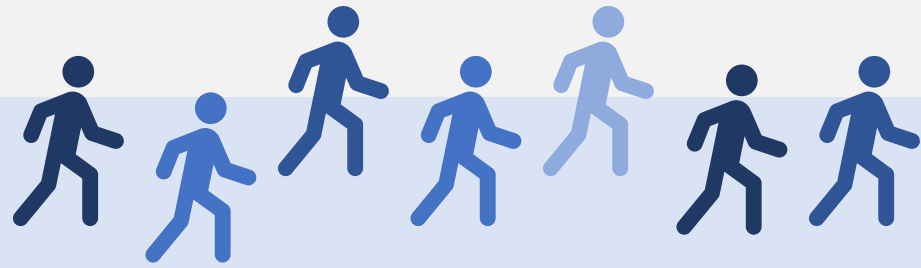


# The Consumer Purchase Funnel

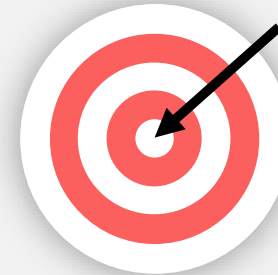




# Advertiser Objectives



**Awareness**



**Interest**

**Desire**



**Buy**





# Advertiser Objectives: An Example



- 1) Increase awareness of brand
- 2) Increase engagement with brand /product
- 3) Increase favorability of brand/product
- 4) Increase purchases of product



# Advertiser Objectives: An Example



1) Increase awareness of brand

**Display Ads**

2) Increase engagement with brand /product

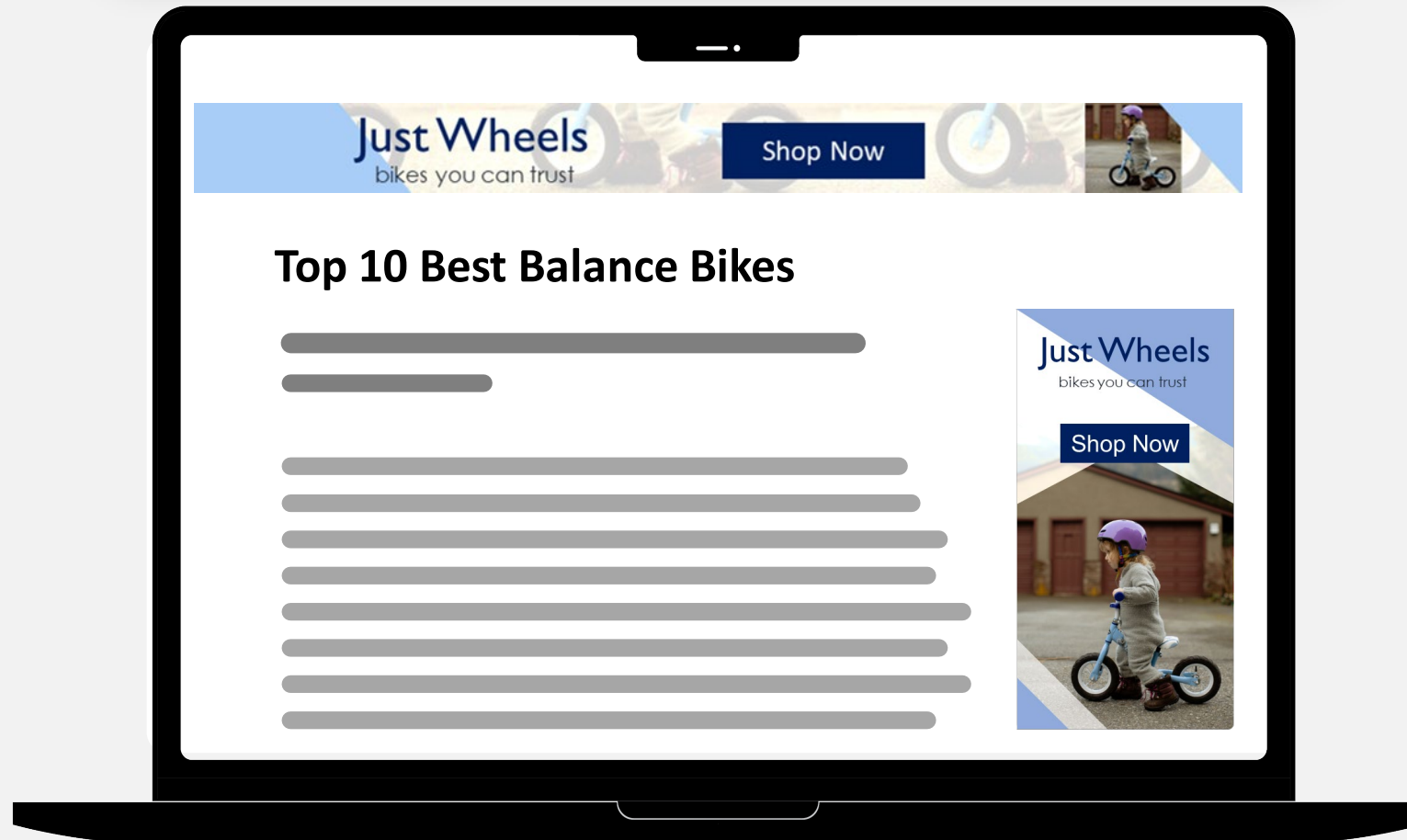
3) Increase favorability of brand/product

4) Increase purchases of product



# Advertiser Objectives: An Example

Objective 1: Increase awareness of brand







# Advertiser Objectives: An Example



1) Increase awareness of brand

2) Increase engagement with brand /product



**Social Ads**

3) Increase favorability of brand/product

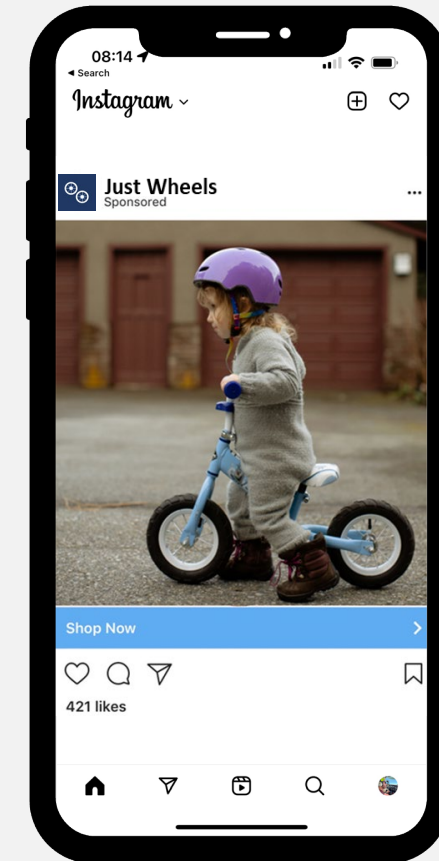
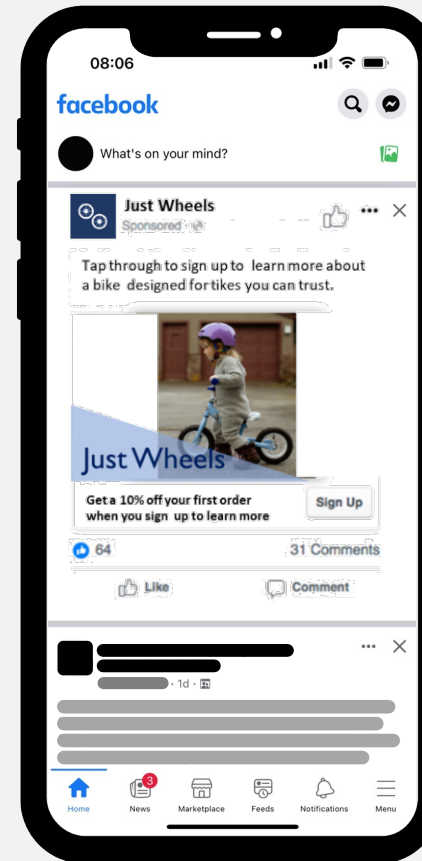
4) Increase purchases of product



# Advertiser Objectives: An Example

Objective 2: Increase engagement with brand/product

facebook





# Advertiser Objectives: An Example



1) Increase awareness of brand

2) Increase engagement with brand /product

3) Increase favorability of brand/product

4) Increase purchases of product

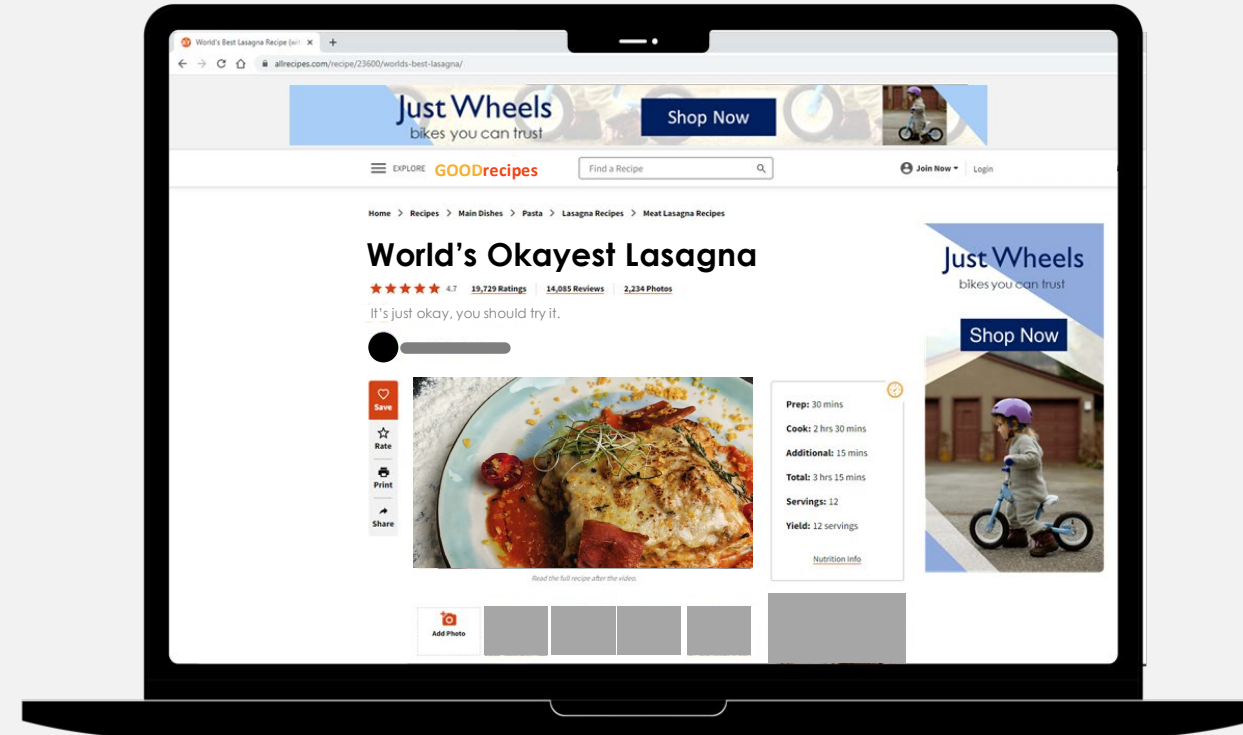
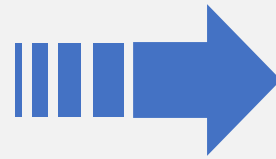
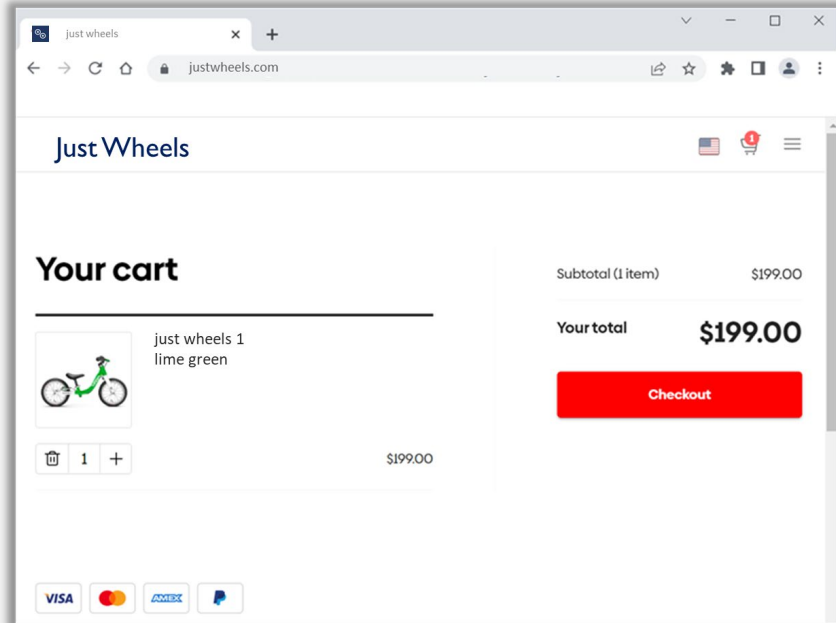
**Retargeted Ads**





# Advertiser Objectives: An Example

Objective 3: Increase favorability of brand/ product





# Advertiser Objectives: An Example





# Advertiser Objectives: An Example



- 1) Increase awareness of brand
- 2) Increase engagement with brand /product
- 3) Increase favorability of brand/product
- 4) Increase purchases of product



**Search Ads**

# What are Search Ads?



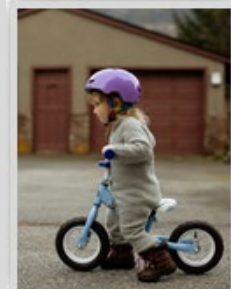
# Search Ads

Search Ads are those served in response to a consumer's real-time query on a general or specialized search engine.



# Search Ads

×
🎤



**Just Wheels Balance Bike ...**  
**\$199.00**  
 30-day retur...

Google balance bikes for toddlers

About 66,900,000 results (0.70 seconds)

**Ad** - <https://www.retrospec.com/>

**Retrospec® Kids' Bikes - Best Balance Bikes with Pedals**  
 Youth Bikes for kids of every age, stage, and skill level. They'll be rolling in no time.

**Summer Blowout Sale**  
 Up to 50% off bikes, boards, & more New markdowns & limited time offers

**Electric Bikes on Sale!**  
 Get up to \$200 off on select e-bike models. Hurry while offer lasts!

**Beach Cruisers**  
 Undeniable honest-to-goodness fun meets minimalist efficiency.

**Ad** - <https://www.bestproductreviews.com/>

**Just Wheels Best Balance Bikes For Toddlers**

Just Wheels offers the best balance bikes for your tots. They are designed to keep your kiddo safe and to learn to ride independently.

**Ad** - <https://www.bestproductreviews.com/>

**Our 10 Best Balance Bikes For Toddlers in The US - September...**  
 Find and compare the best products based on price, features, ratings & reviews. Stop wasting time compiling reviews & use our list to make an informed purchase.

<https://www.twowheelingtots.com> - 10-best-balance-bikes

**10 Best Balance Bikes for Kids of All Ages - Two Wheeling Tots**  
 Aug 25, 2022 — Balance bikes are perfect bikes for 2-year-olds (and up!) as they teach kids to balance on two wheels and ride independently. Balance bikes are ...  
 Woom 1 - Strider Classic And Strider... - Balance Bike Faq's

**Ads - Shop balance bikes for to...**

Just Wheels Balance Bike ... <b>\$199.00</b> 30-day retur...	Hiboy BK1 Electric... <b>\$279.99</b> Hiboy ★★★★★ (18)	Balance Bike for Kids   2 L... <b>\$94.99</b> Tiny Land <b>\$85.49 with ...</b>
Retrospec Cricket Baby... <b>\$49.99</b> Retrospec ★★★★★ (272)	JOYSTAR Roller Balan... <b>\$55.00</b> <del>\$66</del> Joystar Bike Free shipping	12" Air Tires Balance Bike... <b>\$169.99</b> Belsize Bike <b>\$69.99 with ...</b>
Kinderfeets Bamboo... <b>\$130.00</b>	woom - Balance - 2... <b>\$359.00</b>	Balance Bike for 1 Year OL... <b>\$39.95</b>

**Ad** - <https://www.bestproductreviews.com/>

**Just Wheels Best Balance Bikes For Toddlers**

Just Wheels offers the best balance bikes for your tots. They are designed to keep your kiddo safe and to learn to ride independently.





# Search Ads





# Advertiser Objectives: An Example



1) Increase awareness of brand

**Display Ads**

2) Increase engagement with brand /product

**Social Ads**

3) Increase favorability of brand/product

**Retargeted Ads**

4) Increase purchases of product

**Search Ads**





# Search Ads

**01** Text Ads

---

**02** Other types of Search Ads

---



# Search Ads

## 01 Text Ads

---

## 02 Other types of Search Ads

---


# What are Text Ads?





# Text Ads


Google credit cards


About 2,050,000,000 results (0.69 seconds)

**Ad** · <https://www.comparecards.com/> ·   
**10 Best Credit Cards of 2022 - 2022's Best Credit Cards**  
Choosing the Perfect **Credit Card** Just Got Easier. Enjoy 0% Intro APR and More. Apply Now! Get a **Card** with 0% APR Until 2024. Our Experts Found the Best **Credit Card** Offers For You. Compare Now & Save. Apply from Your Phone. Travel...


**Ad** · <https://www.nerdwallet.com/creditcards> ·   
**The Best Credit Cards of 2022 - Reviews of NerdWallet's Best**  
Find the best 0% APR, low interest, balance transfer, student, travel, and rewards **cards**. Expert reviews of all the top-rated **credit cards** on the market. We've found 2022's best.  
Top 10 Credit Card Deals · Cash Back Cards · Best Travel Rewards Cards · Low Interest CCs

**Ad** · <https://www.comparecredit.com/cards> ·   
**10 Best Credit Cards of 2022 - 2022's Best Credit Card Offers**  
Easily Compare & Apply Online for The Best **Credit Cards** with No Annual Fee in Minutes. See Offers Like \$200 Cash Bonus, Unlimited 1.5% Cash Back & No Annual Fee. Apply Now!  
**Summer Sale: Up to 100% off Interest Until 2024**


**Ad** · <https://www.capitalone.com/creditcards> ·   
**Capital One® Pre-Approval - No Harm to Your Credit**  
Compare Our Best **Card** Offers—\$0 Annual Fee, Low Intro APRs, Cash Back or...  
See Pre-Approved Offers · Our Best Rewards Cards · Quicksilver® Card

<https://www.nerdwallet.com/the-best-credit-cards> ·   
**Best Credit Cards - September 2022 - NerdWallet**  
4 days ago — Best **credit card** offers · Wells Fargo Active Cash® Card: · Chase Freedom Unlimited®: · Chase Sapphire Preferred® Card: · Capital One Venture Rewards ...

## Text Ads

**Ad** <https://www.nerdwallet.com/creditcards> ·   
**The Best Credit Cards of 2022 - Reviews of NerdWallet's Best**  
Find the best 0% APR, low interest, balance transfer, student, travel, and rewards **cards**. Expert reviews of all the top-rated **credit cards** on the market. We've found 2022's best.  
Top 10 Credit Card Deals · Cash Back Cards · Best Travel Rewards Cards · Low Interest CCs

## Organic Results

<https://www.nerdwallet.com/the-best-credit-cards> ·   
**Best Credit Cards - September 2022 - NerdWallet**  
4 days ago — Best **credit card** offers · Wells Fargo Active Cash® Card: · Chase Freedom Unlimited®: · Chase Sapphire Preferred® Card: · Capital One Venture Rewards ...

# How are Text Ads sold?



# Text Ads



Find the right keywords for  
your business

[Go to Keyword Planner](#)



# Text Ads

## Keyword Match Types

For the keyword **lawn mowing service**, we can match the following queries (🔍)

*per match type*

### Broad match

Ads may show on searches that **relate** to your keyword.

lawn aeration prices 🔍

Notation for inputting keywords:  
**keyword**

### Phrase match

Ads may show on searches that **include** the meaning of your keyword.

lawn mowing service near me 🔍

hire company to mow lawn 🔍

landscaping service to cut grass 🔍

Notation for inputting keywords:  
**"keyword"**

### Exact match

Ads may show on searches that **are** the same meaning as your keyword.

lawn mowing service 🔍

grass cutting service 🔍

Notation for inputting keywords:  
**[keyword]**

Loose matching

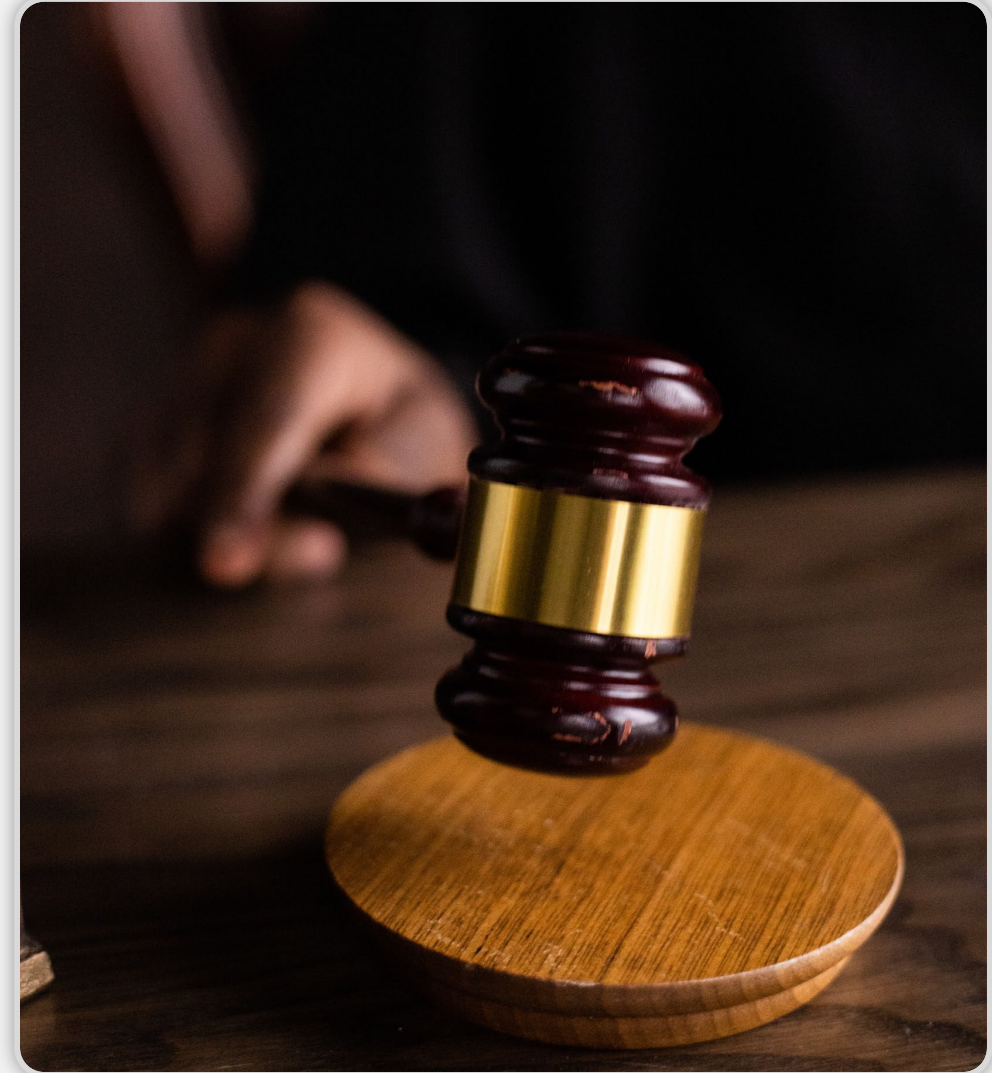
Moderate matching

Tight matching



# Text Ads

- Real-Time Auctions
- Real-Time Bidding





# Who shows Text Ads in the US?



# Text Ads

## Independent General Search Services



## Syndicated General Search Services



What is Google's  
market share of  
Text Ads in the US?



# Text Ads Market Share

## Search Text Advertising Market Shares (US)

**[REDACTED]**



# Search Ads

01 Text Ads

---

**02** Other types of Search Ads

---

What are the other types  
of Search Ads?



# Search Ads

Text Ads



The screenshot shows a Google search for 'lego sets'. The search bar at the top contains 'lego sets' and the Google logo. Below the search bar, there are navigation tabs for 'All', 'Shopping', 'Images', 'News', 'Videos', and 'More'. The search results are divided into three main sections:

- Text Ads:** A red-bordered box highlights three text-based advertisements. The first is from StockX, the second is from the official LEGO Shop, and the third is from Amazon. Each ad includes a title, a brief description, and links to related content like 'Buying Guide' or 'How It Works'.
- Organic Results:** A blue-bordered box highlights the first organic search result from the official LEGO Shop, titled 'All Sets | Official LEGO® Shop US', which lists various LEGO sets and their categories.
- Shopping Ads:** A green-bordered box highlights a grid of shopping advertisements. Each ad features a product image, the product name, price, and the retailer's name (e.g., Amazon.com, LEGO.com, Target).

Organic Results



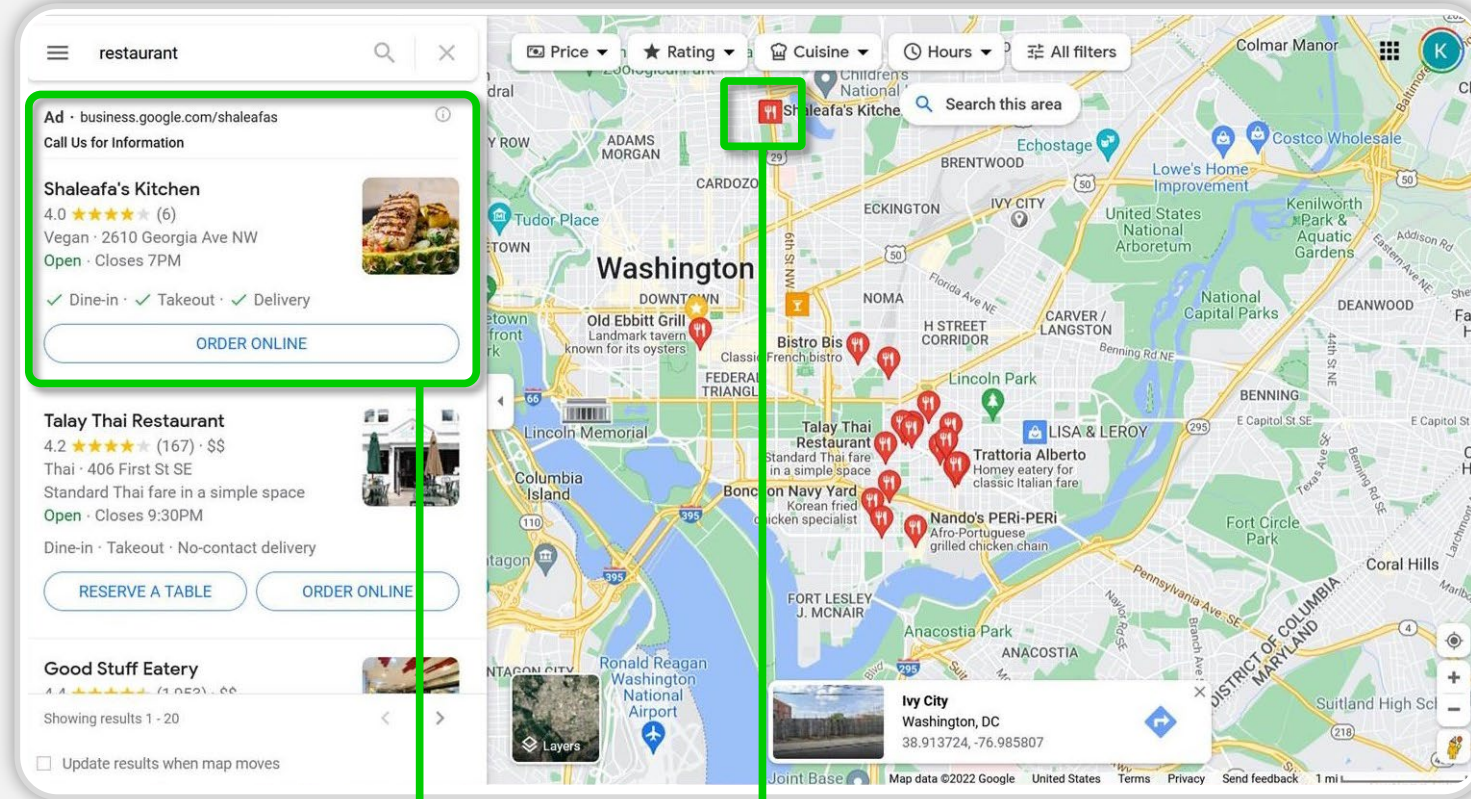
Shopping Ads





# Search Ads

Maps  
SERP



Other Search Ads





# Search Ads

Travel  
SERP

The screenshot shows a Google search for 'cartersville georgia h...' with filters for 'Hotels' and 'Vacation rentals'. The search results are for 'Cartersville - 70 hotels'. The first two listings are highlighted with a green box:

- Holiday Inn Express & Suites A...** - \$124. Ad - From **ff** Holiday Inn Express & Suites Acw...  
3.9 (280) | 2-star hotel | Free breakfast, Free Wi-Fi, Free parking, Outdoor pool, Air conditioning. [View offer](#)
- Days Inn by Wyndham Carters...** - \$110. Ad - From **ff** Days Inn by Wyndham Cartersville  
3.5 (278) | 2-star hotel | Free breakfast, Free Wi-Fi, Free parking, Outdoor pool, Air conditioning. [View offer](#)

Other listings include Holiday Inn Express & Suites C... (\$136), Tru by Hilton Cartersville (\$198), and Home2 Suites by Hilton Carter... (\$171).

Other  
Search  
Ads



# Search Ads

Booking.com  
SERP

**Booking.com** USD [List your property](#) [Register](#) [Sign in](#)

[Stays](#) [Flights](#) [Flight + Hotel](#) [Car rentals](#) [Attractions](#) [Airport taxis](#)

Home > United States of America > Georgia > Cartersville > Search results

**Search**  
Destination/property name:  
  
Check-in date:  
  
Check-out date:  
  
2-night stay  
  
 I'm traveling for work  
[Search](#)

**Filter by:**

**Your Budget (per night)**  
 Set your own budget

<input type="checkbox"/> \$50 – \$100	8
<input type="checkbox"/> \$100 – \$150	12
<input type="checkbox"/> \$150 – \$200	6
<input type="checkbox"/> \$200 +	11

**Popular Filters**

<input type="checkbox"/> Free cancellation	25
<input type="checkbox"/> Wonderful: 9+ Based on guest reviews	1
<input type="checkbox"/> Breakfast Included	22
<input type="checkbox"/> Pet friendly	16
<input type="checkbox"/> No prepayment	22

**Cartersville: 12 properties found** [Show on map](#)

[Our Top Picks](#) [Homes & apartments first](#) [Price \(lowest first\)](#) [Best reviewed & lowest price](#) [Stars \(highest first\)](#) [...](#)

**Comfort Inn & Suites Cartersville - Emerson Lake Point** **Good** 7.2  
176 reviews  
Cartersville · [Show on map](#) · 3.8 miles from center  
Standard King Room - Non-Smoking  
1 king bed  
Breakfast included  
2 nights, 2 adults  
\$277  
[See availability](#)

**Courtyard by Marriott Cartersville** **Very Good** 8.5  
69 reviews  
Cartersville · [Show on map](#) · 3 miles from center  
King Guest Room with Sofa Bed  
2 beds (1 king, 1 sofa bed)  
**Only 5 rooms left at this price on our site**  
2 nights, 2 adults  
\$464  
[See availability](#)

**Microtel Inn & Suites - Cartersville** **Good** 7.1  
913 reviews  
Cartersville · [Show on map](#) · 3.1 miles from center  
Queen Room - Non-Smoking  
1 queen bed  
Breakfast included  
FREE cancellation • No prepayment needed  
You can cancel later, so lock in this great price today!  
**Only 7 rooms left at this price on our site**  
2 nights, 2 adults  
\$237  
[See availability](#)

Other  
Search  
Ads



# Search Ads

## Amazon SERP

The screenshot shows the Amazon search results page for "brown shoes". The search bar at the top contains "brown shoes" and the Amazon logo. Below the search bar, there are navigation links for "All", "Best Sellers", "Amazon Basics", "Customer Service", "New Releases", "Prime", "Today's Deals", "Music", "Books", "Amazon Home", "Registry", "Fashion", and "All-new Fire 7 Kids tablet". The search results are sorted by "Featured".

The results section shows 1-48 of over 50,000 results for "brown shoes". The first row of results is highlighted with a green box and contains four sponsored products:

- Jousen**: Men's Dress Shoes Classic Mens Oxfords Formal Business... \$48.99, 4,732 reviews, Prime, FREE Shipping by Amazon.
- DREAM PAIRS**: Bruno Marc Moda Italy Men's Prince Classic Modern Forma... \$49.99, 13,012 reviews, Prime, FREE Shipping by Amazon.
- Clarks**: Men's Tilden Walk Oxford \$63.20 (was \$99.00), 6,975 reviews, Prime, Prime Try Before You Buy.
- Rockport**: Men's Eureka Walking Shoe \$58.32 (was \$100.00), 17,994 reviews, Prime, Prime Try Before You Buy.

The second row of results is also highlighted with a green box and contains four sponsored products:

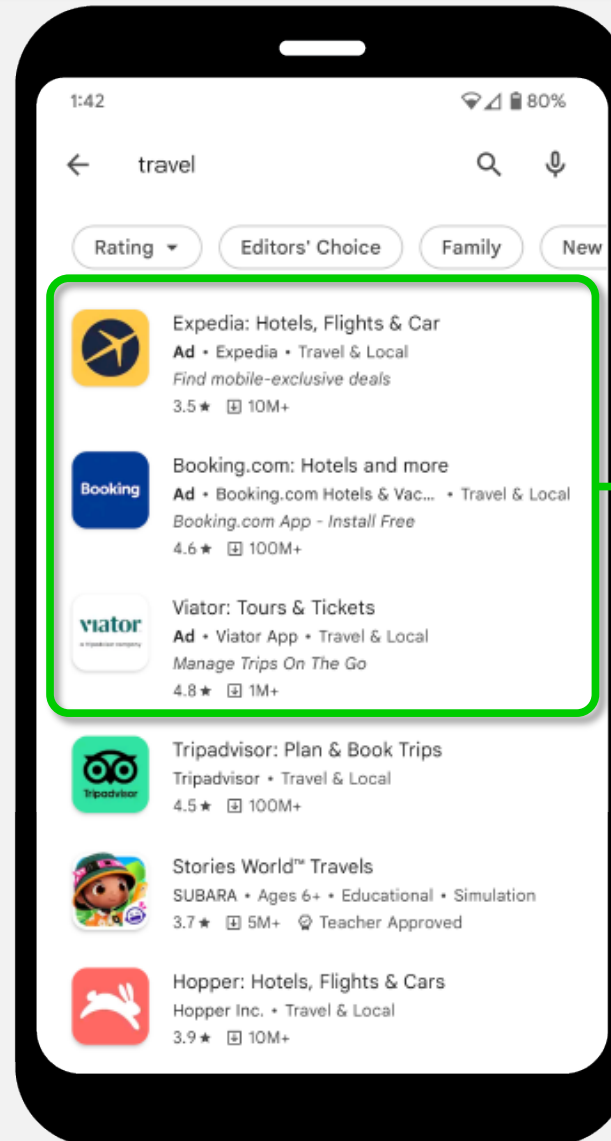
- Dockers**: Men's Shelter Plain Toe Oxford \$48.99, 1,234 reviews, Prime, FREE Shipping by Amazon.
- TSIODFO**: Men's Dress Shoes Black Brown \$49.99, 2,345 reviews, Prime, FREE Shipping by Amazon.
- Kenneth Cole**: Unlisted by Kenneth Cole Men's Half Time Oxford, Cognac, 10... \$63.20, 3,456 reviews, Prime, Prime Try Before You Buy.
- GIFENNSE**: Men's Dress Shoes Oxford \$58.32, 4,567 reviews, Prime, Prime Try Before You Buy.

Shopping Ads  
(Called Sponsored  
Products)



# Search Ads

Play Store  
SERP



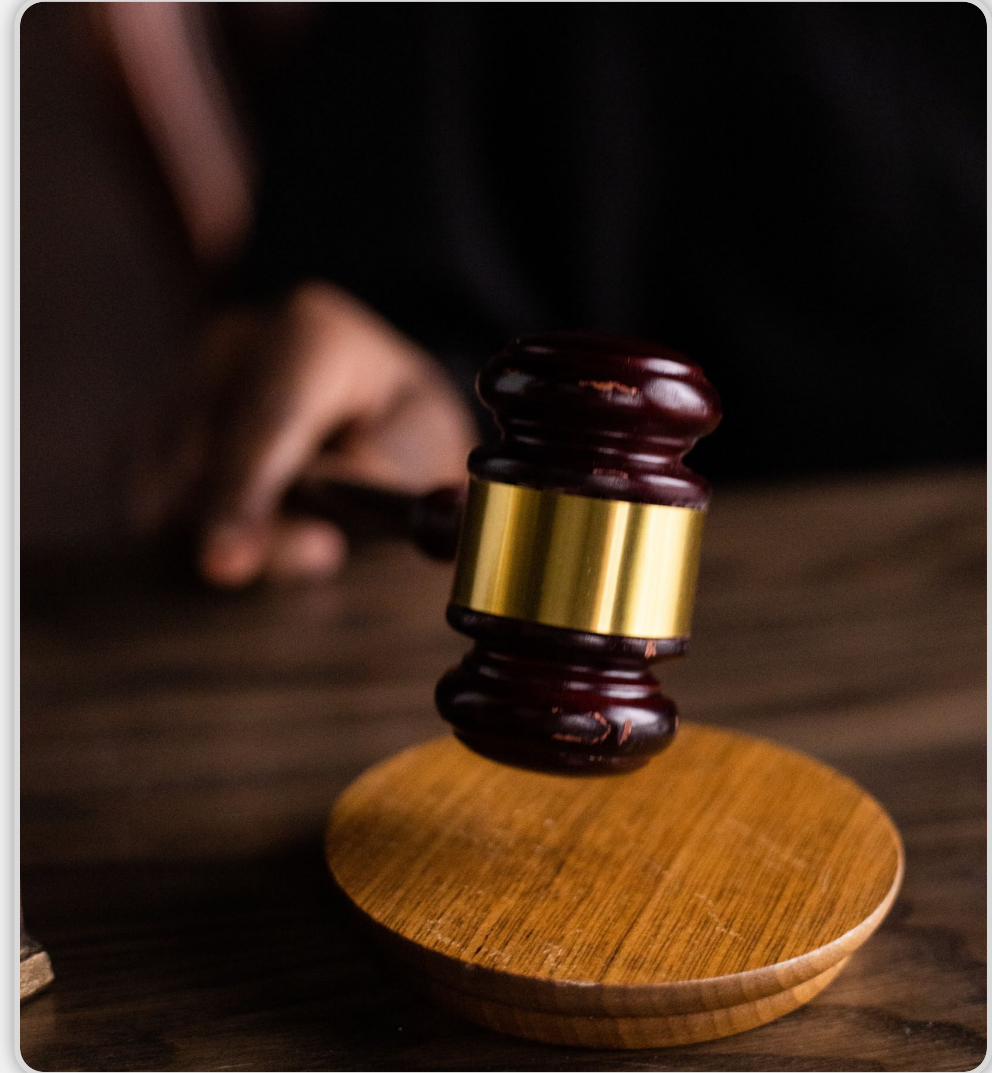
Other  
Search  
Ads

How are other types  
of Search Ads sold?



# Search Ads

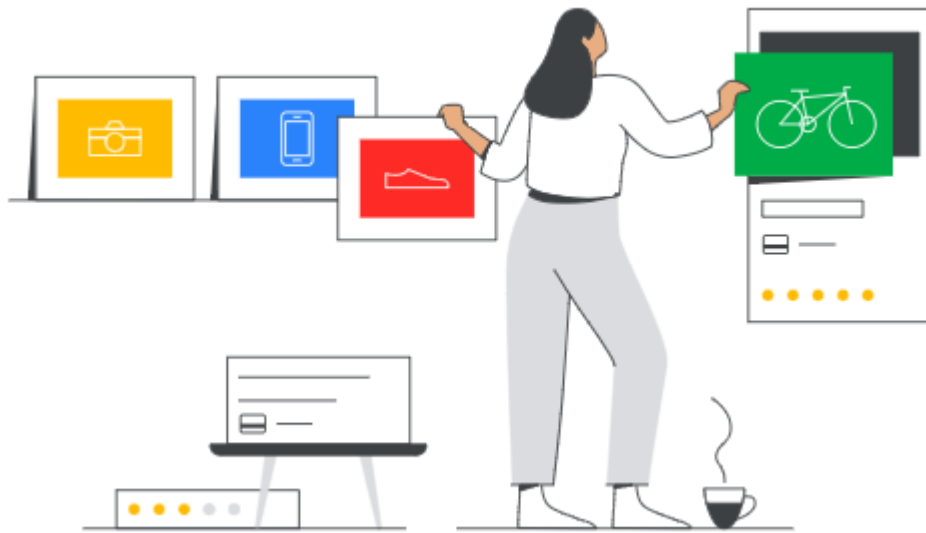
- Real-Time Auctions
- Real-Time Bidding





# Search Ads

About Shopping campaigns and Shopping ads



“To get started, you'll send us your product data with Merchant Center and create a campaign in Google Ads. Then, **we'll use your campaign to create ads** on Google and around the web where potential customers can see what you're selling.”

- *Google Ads Help*

Who shows other types of  
Search Ads in the US?





# Search Ads

Google



Expedia®

Bing

DuckDuckGo®

yelp\*

yahoo!



amazon advertising

What is Google's market share of Search Ads in the US?



# Search Ads

Search  
Advertising



Text Ads



Other Types of  
Search Ads



# Search Ads Market Share

## Shares of Search Ads Revenue (US)

**[REDACTED]**

Why is data important to  
the Search Ads business?

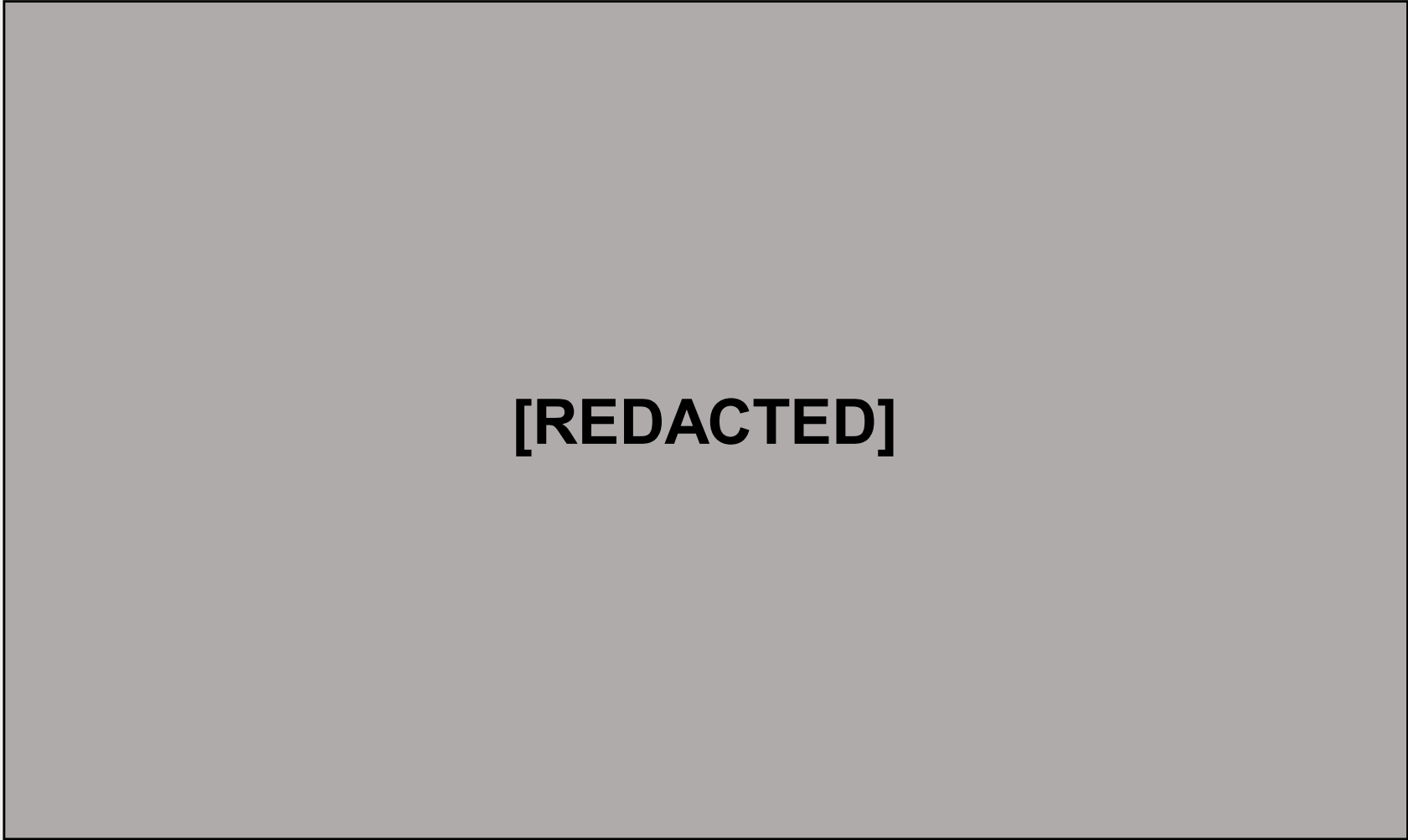


# Scale





# What is Scale?



**[REDACTED]**



# Roadmap

- 1 General Search Industry Overview
- 2 General Search Mechanics
- 3 Search Distribution
- 4 Google's Search Distribution Contracts
- 5 Search Advertising Industry Overview



# Appendix



# Search Timeline

