VALUE OF MEDIA FOR GOOGLE IN POLAND

Final Report on the results of the behavioral economic assessment to determine the value of journalistic content for Google in Poland

FehrAdvice & Partners AG
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EXECUTIVE SUMMARY

Google dominates the Polish search engine market with a market share of 91.14%. A substantial share of the value generated in search stems from informational queries – many of which rely on journalistic content to deliver trusted, complete, and relevant answers. However, media companies that produce this content currently receive no financial compensation, despite their significant contribution to the quality of Google's search experience. This imbalance creates a structural gap that has direct implications for the sustainability of journalistic content in Poland.

The aim of this study is to quantify the economic value that media content generates within Google Search in Poland and to provide a data-driven basis for determining a fair contribution from Google to Polish media organisations. To achieve this, the report combines market data on search revenues and search engine shares with a large-scale online behavioral assessment, conducted with 2,062 Polish internet users. The experiment tested how the presence or absence of media content in Google Search influences user behavior, satisfaction, trust, perceived quality, and willingness to pay.

The findings are clear. 68% of users explicitly prefer the version of Google that includes media content. When such content is removed, user loyalty drops by 4.1 percentage points – a relative decline of nearly 8%. Google is also perceived as significantly more complete, timely, trustworthy, and high-quality when media content is present. Although overall satisfaction remains relatively stable, users indicate a willingness to pay up to 18% more for Google when journalistic content is integrated. The data also confirms that journalistic content helps retain users within the Google ecosystem and increases time spent on the platform.

Building on these findings, the report calculates the fair value of media content for Google in Poland. Starting from a total search ad revenue of €577 million and applying Google's market share of 91.14%, the estimated revenue generated by Google Search amounts to €525.88 million (lower bound € 473.29 to 578.46 million). Based on international benchmarks for attributing value to content providers and applying sensitivity bounds at each calculation step, the **fair annual contribution** from Google to Polish media companies is estimated to lie between **€49.98 million and €119.04 million**, with a calculated reference value of **€78.67 million**. A detailed breakdown of the methodology and the calculation steps is provided in the Conclusion section of the report.

Overall, this report offers a robust, evidence-based foundation for establishing a sustainable and fair compensation mechanism between Google and the Polish media sector – ensuring that the value created through journalistic content is more equitably shared in the digital ecosystem.

1. STUDY BACKGROUND IN POLAND

Google has evolved into a self-contained digital ecosystem that guides users toward its own services and away from external websites—particularly those of media outlets. This dynamic has profound implications: while journalistic content plays a vital role in satisfying user information needs, the value created by this content is often retained within the platform, leaving media organisations undercompensated.

The economic imbalance between content providers and digital platforms has become a central issue in international policy debates. In recent years, several countries—including Canada, Australia, and members of the European Union—have introduced new regulatory frameworks to ensure fair remuneration for news content. These developments have also triggered growing interest in country-specific analyses of the value media content generates for dominant platforms like Google.

What happens to a society when trusted journalism becomes invisible—or disappears altogether from the digital space?

Free and independent media are essential for a healthy democracy. They ensure that citizens have access to accurate, diverse, and verified information—especially in times of political, social, or economic uncertainty. If journalistic content were no longer accessible via search engines, this would significantly impair the public's ability to stay informed. Not only would it weaken the visibility of credible sources, but it would also risk amplifying unverified or polarising content, often distributed through less transparent channels such as social media. Ensuring the continued presence of journalistic content in search is therefore not only an economic necessity, but a democratic one.

In Poland, Google commands over 90 % (exactly 91,14%) of the search engine market (StatCounter 2025) and plays a central role in how users access news and information. Against this backdrop, the Związek Pracodawców Wydawców Cyfrowych (ZPWC), the Digital Publishers Employers Association, commissioned FehrAdvice & Partners AG to conduct a behavioral economics assessment to quantify the contribution of journalistic content to Google's success in Poland.

The primary goal of this study is to provide an evidence-based foundation for establishing a fair financial contribution from Google to Polish media providers. By combining market data with behavioral insights, the study aims to inform future negotiations and contribute to a sustainable digital media environment in Poland—where high-quality journalism continues to be produced, financed, and fairly valued. Ultimately, this is not only an economic issue, but also one of societal relevance: access to reliable news content is essential for an informed public and a functioning democracy.

This report presents the full results of the study. It is based on a state-of-the-art online experiment with a representative sample of 2,062 Polish internet users and integrates up-to-date market data from the official 2023 AdEx Benchmark Report

(IAB Europe 2023) The experiment was designed to measure the behavioral and monetary value of journalistic content in real search environments—both with and without media content integrated into the results.

The study design and scientific approach was validated by academic advisors Ernst Fehr, Professor for Microeconomics and Experimental Economic Research at the University of Zürich, and Stefano Brusoni, Professor for Technology and Innovation Management at ETH Zürich.

The findings offer robust, data-driven evidence on how media content shapes user behaviour, trust, satisfaction, and willingness to pay of Polish users on Google. More importantly, they provide a concrete foundation for future steps and discussions between media organisations, the Polish society and Google regarding a fair financial contribution for journalistic content in the Polish search ecosystem.

2. OVERVIEW OF THE EXPERIMENTAL APPROACH

To determine the true value of journalistic content within the Google search ecosystem in Poland, this study applied a behavioral economics approach. Instead of relying solely on attitudinal surveys or speculative modelling, the research was designed to capture real user behaviour in simulated yet highly realistic search environments. This allows for robust conclusions about how journalistic content shapes the user experience, search decisions, and ultimately, the perceived value of Google as a platform.

At the core of the approach lies an online experiment in which participants were randomly assigned to different experimental conditions. This setup enabled a direct comparison between users who interacted with Google search results **with** journalistic content and those who experienced them **without**. This structure made it possible to isolate the specific impact of media content on user perceptions, actions, and preferences.

Importantly, the study did not rely on mock-ups or artificially constructed search interfaces.

Instead, participants were shown real Google Search result pages that closely mirrored the actual user experience. These pages were static (non-clickable) to isolate visual and cognitive responses without introducing navigation-based variation. This applied equally to both media and non-media treatments, ensuring consistency across conditions.

. Instead, the search results shown to users were **real Google results** captured at a specific point in time. This means that participants were exposed to actual headlines, links, and snippets—exactly as they appeared on Google on that day. The experimental interface replicated the look and feel of Google Search, ensuring a natural and familiar user experience. This was essential to preserve the authenticity of behaviour and to avoid bias introduced by artificial setups.

The study goes beyond traditional opinion polling by measuring actual behaviour: which results users clicked on, how satisfied they were with the information provided, how credible they found the content, whether they would choose Google again, and what they would be willing to pay for a search engine like Google under different content conditions. The underlying logic assumes that the **user-perceived value of media content** can be translated into a share of the total economic value generated by the platform.

Compared to traditional surveys, this behavioral approach allows for the identification of **causal effects**, not just correlations. By observing real-time decisions in a controlled environment, the online assessment captures the behavioral relevance of journalistic content and quantifies its contribution to user satisfaction and platform value. This methodology is particularly well-suited for questions where **declared preferences may differ from actual behavior**—and where user decisions depend heavily on context and presentation. This experimental framework builds on similar studies previously conducted in Switzerland, Austria, the Netherlands, and Denmark, and adapts the proven methodology to the Polish context.

3. DEEP DIVE INTO THE ONLINE ASSESSMENT

The online assessment was conducted with a representative sample of 2,062 internet users in Poland, balanced across gender, age (18–74), region, and device type (desktop or mobile). Participants were randomly assigned to one of two experimental conditions in a between-subjects design: a Google Search experience with journalistic content ("With Media") and one without journalistic content ("Without Media"). This setup made it possible to causally isolate the effect of media content on user behaviour and perceptions.

The interface was designed to closely resemble a real Google search results page. Importantly, the search results were not fictional or artificially constructed. They were based on real, live Google queries, captured at a specific point in time. This ensured high ecological validity. In the "With Media" condition, authentic snippets and links to Polish news outlets were included; in the "Without Media" condition, these editorial results were removed or replaced with neutral, non-journalistic content. The layout and interaction structure were kept identical across both treatments.

Each participant was free to choose one of three search topics, based on their personal interest:

1. Presidential elections in Poland

2. Inflation and economic developments in 2025 in Poland

3. Iga Świątek

After completing the Google search in their chosen topic, participants were asked to respond to a set of structured items. The study measured a wide array of behavioral and cognitive outcomes, including:

• Click behaviour (e.g. zero clicks, clicks on Google-integrated content, external links)

• Willingness to pay for continued access to the respective Google experience

• Likelihood of using Google again in a similar context

• Subsequent search behaviour (i.e. where participants would turn next for information)

• Demographic characteristics for contextual segmentation

In addition to direct questions and behavioral tracking, the online assessment incorporated two tools from behavioral economics to gain deeper insights into underlying beliefs and implicit attitudes:

Association Test (AT)

To go beyond self-reported attitudes, participants completed an Association Test. They were asked to respond as quickly and intuitively as possible to a set of short evaluative statements. The direction (agreement or disagreement) and speed of response were analysed to detect automatic cognitive associations. These responses provide a window into participants' true beliefs and emotional reactions—even when they are not consciously articulated. This method is widely used in behavioral economics to uncover implicit trust, preference, and aversion mechanisms.

Framing-Based Identity Assessment

The online assessment also used framing techniques to allow participants to project themselves into real-life information situations. They were asked to evaluate how well the search experience aligned with their expectations for quality, transparency, independence, and credibility. These judgments reflect whether users perceive a "fit" between their values and the information environment. This helps capture not only functional satisfaction, but also value-based alignment—an increasingly important factor in digital trust.

By combining observable behaviour with intuitive and value-based assessments, the experimental design enabled the identification of causal effects, not just correlations. It provides a robust and nuanced understanding of how journalistic content contributes to the perceived and actual value of the Google search experience in Poland.

4. TESTED HYPOTHESES

The experimental study was designed to test a set of five hypotheses that reflect key behavioral and economic assumptions about the role of journalistic content in Google Search. Each hypothesis addresses a specific facet of user experience, perception, or platform dynamics.

1. **User Priorities and Expectations**

A large portion of people in Poland relies on Google for information on current topics. When searching for information, they prioritize **quality, completeness, trust, independence, timeliness**, and **guidance**.

2. **Retention within the Google Ecosystem**

A large portion of users remains within the **Google ecosystem when media content is integrated**, as they find the answers directly within the Google ecosystem.

3. **User Experience without Media Content**

A Google without media content is frustrating and less attractive for users, as it is perceived as lower in **quality**, less **credible**, and less **complete** compared to a Google with media content.

4. **Platform Loyalty and Willingness to Pay**

A Google without media is chosen less by users and is associated with a **lower willingness to pay**.

5. **Long-Term Platform Effects**

Without media content, Google suffers long-term damage as users **migrate away** from the Google ecosystem.

These hypotheses were tested using both behavioral and attitudinal measures within a controlled, experimental design. The following section presents the empirical results from the online assessment.

5. RESULTS OF THE ONLINE ASSESSMENT

HYPOTHESIS #1: GOOGLE IS THE DOMINANT ENTRY POINT FOR INFORMATION AND USERS APPLY JOURNALISTIC QUALITY STANDARDS WHEN EVALUATING RESULTS.

The study confirms that a majority of Polish users rely on Google as their primary source for information on current events. When evaluating the usefulness of search results, users apply a multidimensional quality lens: Over 90% of respondents state that **completeness, quality, trust, timeliness, independence**, and **comprehensibility** are essential when judging the value of search results. This pattern underscores that users are not only looking for fast answers but expect journalistic standards to be met - standards that are typically fulfilled by professional media content.

HYPOTHESIS #2: A LARGE SHARE OF USERS REMAINS WITHIN THE GOOGLE ECOSYSTEM WHEN MEDIA CONTENT IS INTEGRATED

The data clearly shows that integrating journalistic content helps Google retain users within its own ecosystem. When media is included in search results, **61% of users** either stay in the Google environment or find their answer without making a single click – compared to **55% without media**.

This 6-percentage point increase is substantial. It reflects a behavioral shift:

• The online assessment showed that users are more likely to stay on Google properties (e.g., YouTube, Maps) when media is present (14% vs. 10%).

• Zero-click behavior – where users find what they need directly – is also slightly more common with media (47% vs. 44%) shown in the online assessment.

• Importantly, this difference was observed in the behavioral online experiment: external websites – especially "other websites" i.e. for example official governmental websites, Wikipedia or the official webpage of Iga Swiatek – were visited significantly more often in the **"without media"** condition (**43%**) compared to the **"with media"** condition (**5%**). This highlights a shift in user behavior when journalistic content is removed from search results.

Conclusion:

Media content helps Google keep users in its ecosystem. Rather than pushing users away, media supports retention and internal engagement – confirming Hypothesis 2.

HYPOTHESIS #3: A GOOGLE WITHOUT MEDIA CONTENT IS LESS ATTRACTIVE, LESS CREDIBLE, AND LESS COMPLETE FOR USERS

The data of the online assessment clearly confirms this hypothesis. When media content is integrated into Google search results:

• The search **success** in answering users' queries rises from **75%** to **80%** (significant increase) when user being asked *"Were you able to answer your question with the search?"*

• Users perceive Google as more:

> • **Attractive**
>
> • **Trustworthy**
>
> • **High-quality**
>
> • **Complete**

While **overall satisfaction (How satisfied the user is with the results)** increases slightly, the difference is **not statistically significant**.

The strongest improvements are observed in:

• **Completeness**: **+31%**

• **Timeliness**: **+25%**

These effects are statistically significant and consistent across different user segments.

A key insight:

Media content improves users' perceptions of Google across almost all dimensions — especially completeness, timeliness, and clarity.

Conclusion:

Google with media content is perceived as more useful, complete, and relevant – validating Hypothesis 3.

HYPOTHESIS 4: A GOOGLE WITHOUT MEDIA IS CHOSEN LESS BY USERS AND IS ASSOCIATED WITH A LOWER WILLINGNESS TO PAY.

The experimental data clearly confirms Hypothesis 4. When asked directly which version of Google they preferred, **68%** of users selected the variant **with media content**, compared to only **32%** who preferred the version without.

This preference also translates into concrete willingness to pay. While **more than 50%** of participants expressed a general willingness to pay for Google's search services, users who were shown **Google with media content** were willing to pay significantly more:

• The **mean willingness to pay** was **PLN 7.92** for the version with media, versus **PLN 7.32** without – an **8.2% increase**.

• Among those willing to pay more than zero, the difference rose to **PLN 13.02** vs. **PLN 11.75**, an **18.15% increase** in favor of the media-enhanced variant.

These findings show that journalistic content enhances both the **perceived value** of Google and users' **willingness to pay**, underscoring the economic relevance of media content in search results.

HYPOTHESIS 5: WITHOUT MEDIA CONTENT, GOOGLE SUFFERS LONG-TERM DAMAGE AS USERS MIGRATE AWAY FROM THE GOOGLE ECOSYSTEM.

The experimental data clearly supports Hypothesis 5. When participants were asked which channel they would choose in a repeated search, **Google lost 4.1 percentage points in user preference**, dropping from **53.5% (with media)** to **49.4% (without media)**. This corresponds to a **relative decline of nearly 8%** – a strong indicator that media content is essential for retaining users over time.

In addition, the **average time spent on the Google search results page** dropped significantly when media content was excluded:

• **With media content**: 36.8 seconds

• **Without media content**: 32.8 seconds

→ a decrease of **12.5%**

This decline in user engagement and retention suggests that omitting media content not only reduces user satisfaction, but also poses a **long-term strategic risk** for Google, as users begin to migrate to other sources for high-quality information.

Key Findings oft the Online Assessment– Value of Media Content in Google Search (Poland)

1. **Journalistic content significantly enhances user experience.**

Users rate Google as more **complete, trustworthy, and high-quality** when media content is included in search results.

2. **Media content helps Google retain users.**

With journalistic content, **more users stay within the Google ecosystem**, and **fewer exit to external websites** – increasing Google's internal value creation.

3. **Users clearly prefer Google with media content.**

68 % of participants explicitly choose the media-enhanced version of Google when given the option. Willingness to pay is also significantly higher.

4. **Without media content, Google risks long-term user loss.**

When media is excluded, **user preference drops by nearly 8 %** and **time on page falls by 12.5 %**, indicating reduced loyalty and engagement.

6. CALCULATED VALUE FOR GOOGLE IN POLAND

To determine the value of journalistic content for online platforms for Google in Poland, the first step is to calculate the total revenue from Search Engine Advertising (SEA) in the country. After all, this is the source of revenue for Google's search engine. According to the available data (AdEx report 2023), the total SEA revenue in Poland is estimated to be around 577,00 million EUR annually. It is important to note that not all of this revenue goes to Google. Given Google's market share of 91.14% (Statcounter 2025), we estimate that Google's SEA revenue in Poland amounts to approximately 525,89 million EUR. The bounds are estimated with lower and upper bounds of 473,29 million EUR to 578,47 million EUR.

The final value estimation is presented in the **Conclusion** section, where each calculation step is transparently documented. For every step, both upper and lower bounds are applied to reflect uncertainty and provide a robust sensitivity framework.

HOW MUCH OF GOOGLE'S SEA REVENUE IS LINKED TO INFORMATION-BASED SEARCHES?

Not every Google search is informational in nature; some searches are for products or navigation to specific websites, where media content is less relevant. Informational searches are e.g. "current news Polish government", product searches are "buy Smart Full-HD TV", navigational searches are e.g. "facebook.com" – entered into the search mask, not into the address line of the browser. To determine the share of information-based searches, we reference data from "Digitale Werbung und das Google Ökosystem"[1] (2022) by Prof. Thomas Höppner and Tom Piepenbrock, which indicates that 55% (range: 50% to 60%) of all Google searches are informational. Based on this, we calculate that 289,23 million EUR (lower and upper bounds of 236,65 – 347,08 million EUR) of Google's SEA revenue in Poland can be attributed to information-based searches on Google.

HOW MUCH OF THE REVENUE FROM INFORMATION-BASED SEARCHES IS LINKED TO JOURNALISTIC CONTENT?

A significant proportion of Google's information-based searches rely on journalistic content. The recent online assessment in Poland shows that 68% of users do prefer Google with Media content then Google without Media. Based on that significant result we estimate that 196,68 million EUR of Google's SEA revenue in Poland is directly linked to journalistic content (289,23 million EUR revenue from information-based searches x 68% = 196,68 million). The upper and lower bounds were calculated based on values of 156,19 million EUR as (lower bound) and 242,96 million EUR (upper bound).

WHAT IS A FAIR DISTRIBUTION OF THIS REVENUE THAT THE MEDIA GENERATE FOR GOOGLE?

To find a **"fair share"**, we will compare two ecosystems:

1. **Search Engine Advertising (SEA)**

2. **Online Advertising Market**

Search Engine Advertising specifically refers to ads that are displayed on **search engine results pages**. For example, when you type a query into **Google**, the top and sometimes bottom results, often marked as **'Ad'**, are paid placements. This type of advertising is highly targeted, as it can be based on the user's **search query** and, therefore, closely aligned with the user's personal interests.

On the other hand, the **online advertising ecosystem** encompasses a broader range of ad types across various websites. This can include **banner ads, video ads, and interactive ads** on news sites, blogs, and other online platforms. Unlike SEA, which is **query-based**, online advertising can be targeted based on a variety of factors like **browsing behavior, demographics, and more**.

Even in markets where Google is not a monopoly, like online advertising, it still plays a key role.

In this context, Google serves as an intermediary, aggregating content from different media providers on its platform and marketing the resulting user attention to advertisers. This is distinct from **Search Engine Advertising (SEA)**, where Google itself operates the search engine and directly controls the placement of paid search ads on its search results pages. In the online advertising ecosystem, however, Google facilitates advertising placements on third-party websites through platforms like Google AdSense and the Google Display Network. By doing so, it enables advertisers to access a large, engaged audience, even outside of Google's own search engine.

Four key players are required in this ecosystem:

1. **Content providers (media)** – Journalistic content produced by media.

2. **Users** – People consuming the content and remaining within the Google ecosystem.

3. **Advertisers** – Companies paying to display ads on search engines.

4. **Platform (Google)** – The search engine or online marketer, which connects advertisers with users and content providers.

In summary, content providers and platform providers (like Google) must share the revenue in a fair manner to achieve **balance and sustainability** within this ecosystem. But what does this balance look like?

HOW DOES REVENUE SHARING WORK IN EXISTING ADVERTISING ECOSYSTEMS?

In the Google AdSense model, media companies host Google's ads on their content pages and receive 32-49% of the revenue, 40% on average. By analogy, in the SEA model, where Google hosts media content on its platform, it is reasonable to apply a similar revenue-sharing logic, as the media content drives user engagement and contributes directly to Google's advertising revenue. In the case of Google, this benchmark range is further supported by the platform's unique position in the digital ecosystem. Google not only aggregates demand by providing access to content via search, but also controls the monetization infrastructure – including its proprietary advertising system, auction mechanics, and targeting capabilities. This dual role enables Google to internalize the value generated by journalistic content, without directly compensating the media companies that produce it.

In the online advertising market, Google is not a monopolist and faces competition from other providers. But in the search engine advertising market, Google acts as a monopolist with a market share of 91,14% in Poland.

The proposed fair revenue split for Polish Media will be calculated in the next chapters.

WHAT IS A FAIR REVENUE SPLIT FOR POLISH MEDIA?

When considering a **fair revenue split** between content creators and platforms in the search engine world, it's clear that Google's search engine offers added value by bringing together diverse information sources. In the Google AdSense model, media companies host Google's ads on their content pages and receive 32-49% of the revenue, 40% on average. By analogy, in the SEA model, where Google hosts media content on its platform, it is reasonable to apply a similar revenue-sharing logic, as the media content drives user engagement and contributes directly to Google's advertising revenue.

Another example is the partnership between tech platforms like **Microsoft MSN** and media companies, where the platform gets **40%** and the content provider gets **60%** of the revenue.

So, what's a fair amount for media companies in Poland to ensure a **thriving media ecosystem**?

Using **Google AdSense as a reference**, media companies should receive around:

Lower Bound (32%)	49,98 million €
Fair share (40%)	**78,67 million €**
Upper Bound (49%)	119,04 million €

7. CONCLUSION: HOW MUCH SHOULD POLISH MEDIA RECEIVE?

Metric	Value	Explanation
Total SEA Revenue (Poland)	**Estimated value: 577,00 million** € LOWER BOUND: 519,30 million € UPPER BOUND: 634,70 million €	▪ Total market revenue from SEA in Poland (IAB Report 2023) ▪ The bounds were set at 90% and 110%.
Google's Share of SEA Revenue (Poland)	**Estimated value: 525,89 million** € LOWER BOUND: 473,29 million € UPPER BOUND: 578,47 million €	▪ Google holds a 91.14 % market share in Poland (StatCounter 2025)
Revenue from Information-Based Searches	**Estimated value: 289,23 million €** LOWER BOUND: 236,65 million € UPPER BOUND: 347,08 million €	▪ 55% of searches are from information searches ▪ The bounds were set at 60% and 50% Thomas Höppner i Tom Piepenbrock (2022)
Revenue with contribution from Journalistic Content	**Estimated value: 196,68 million €** LOWER BOUND: 156,19 million € UPPER BOUND: 242,96 million €	▪ 68% of information searches linked to journalistic content, based on the online assessment (FehrAdvice 2025) ▪ with a 95% confidence interval
Fair Share for Polish Media	**Estimated value: 78,67 million €** LOWER BOUND: 49,98 million € UPPER BOUND: 119,04 million €	▪ 40% of the revenue linked to journalistic content in Google searches is the fair share for Polish media ▪ The bounds were set at 32% and 49%.

APPENDIX

· **Methodological Deep Dive:**

To ensure the quality, validity, and reliability of the findings, several methodological safeguards were applied throughout the online experiment:

· **Randomisation and Group Assignment:**

Participants were randomly allocated to one of the two experimental conditions ("With Media" vs. "Without Media") using a randomised algorithm embedded in the survey platform. This ensured that individual characteristics were evenly distributed across conditions, allowing for unbiased causal comparisons.

· **Technical Implementation and Access:**

The online experiment was conducted entirely online via a certified research panel. Participants completed the task using their own desktop or mobile devices in a natural setting. The average completion time was approximately 13 minutes, and the user interface was optimised for both device types to ensure a consistent experience.

· **Data Quality and Cleaning:**

To maintain data integrity, responses were excluded if participants completed the online assessment unusually quickly, failed attention checks, or displayed technical anomalies (e.g. incomplete rendering of the search interface). Only fully completed, high-quality responses were included in the analysis.

· **Participant Quotas and Representativeness:**

The sample was quota-representative for the Polish internet-using population in terms of age, gender, and regional distribution. Mobile vs. desktop usage was also balanced to reflect real-world search contexts.

· **Ethical Standards and Privacy:**

Participation in the study was voluntary and anonymous. All data were processed in compliance with relevant data protection regulations and behavioralresearch ethics. No personally identifiable information was collected or stored.

These measures ensured that the experimental results could be interpreted as causally valid and representative for Polish internet users' real-world search behaviour.

VISUAL INSIGHTS FROM THE ONLINE ASSESSMENT

How did we approach these research questions?

The experimental approach in detail*:

- Participants were **randomly assigned to either conduct a Google search <u>with media</u>** or a Google search **<u>without media</u>**. Differences in the measured KPIs can be attributed to the **inclusion of media content in Google**.

- This study utilized a modern methodology of an online experiment, optimized according to behavioral economic principles.

- A total of **2,062 internet users from Poland participated in the Assessment** (quota-based sampling by gender, age (between 18 and 74), and region).

- Fieldwork period: Start: 28th Feb to End: 05th March, 17 minutes average survey duration
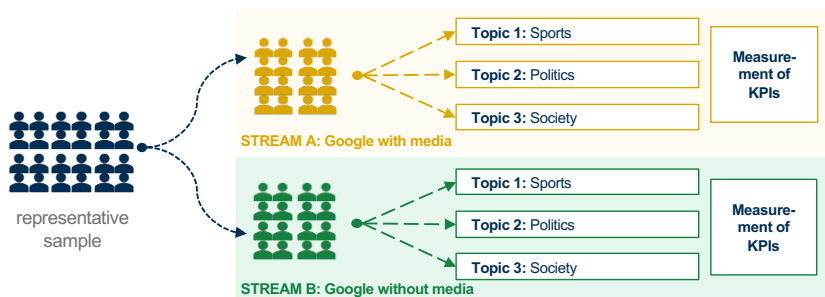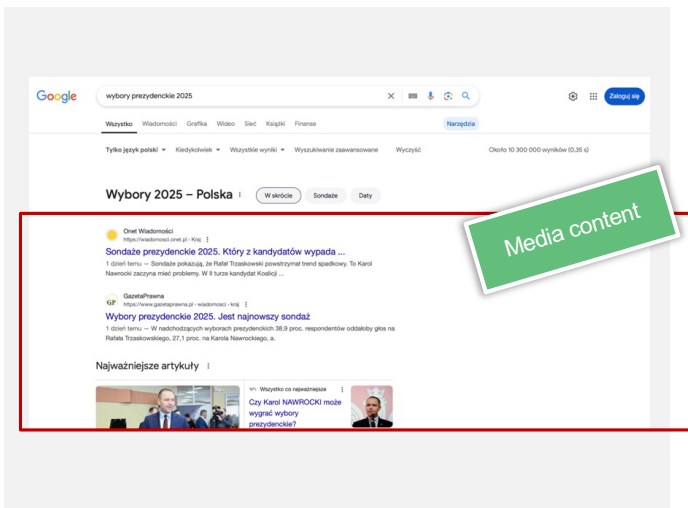
Hypothese 2: A large portion of users remains within the Google ecosystem when media content is integrated, as they find the answers directly within the Google ecosystem
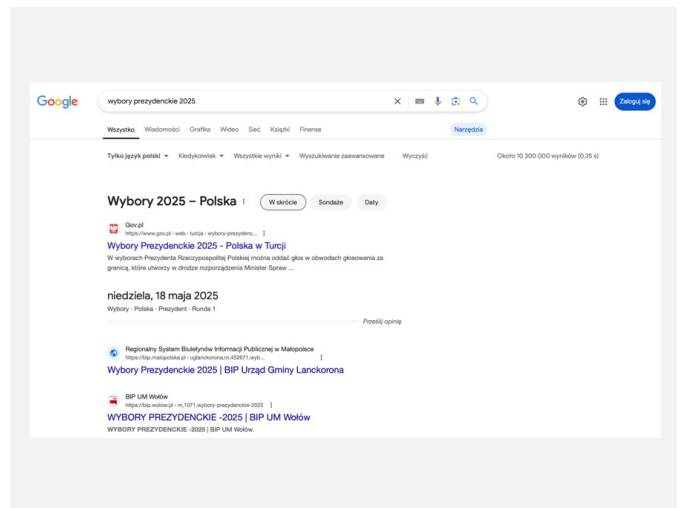
What did Google searches look like for the topic "Iga Swiatek"?

✓
WITH MEDIA
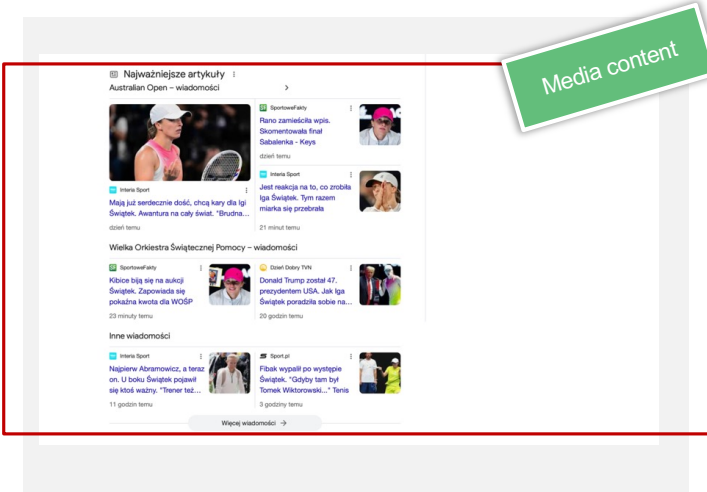
✗
WITHOUT MEDIA
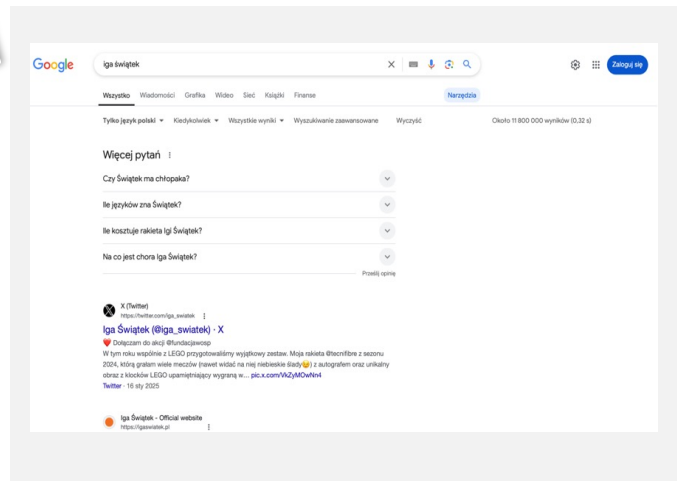
Hypothese 2: A large portion of users remains within the Google ecosystem when media content is integrated, as they find the answers directly within the Google ecosystem

What did Google searches look like for the topic "President elections in Poland 2025"?

✓
WITH MEDIA

✗
WITHOUT MEDIA

Hypothese 2: A large portion of users remains within the Google ecosystem when media content is integrated, as they find the answers directly within the Google ecosystem

What did Google searches look like for the topic "Inflation Poland 2025"?
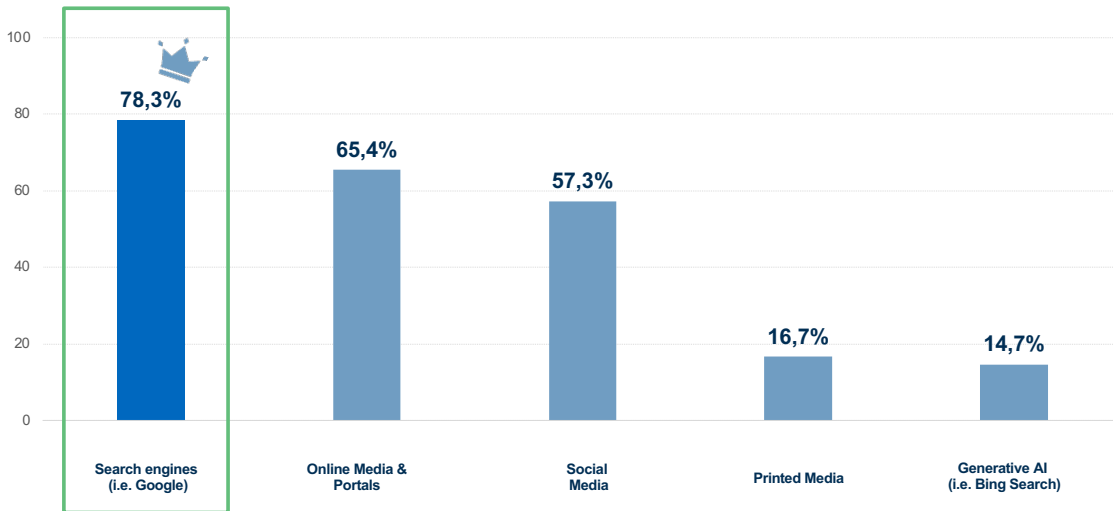
✔
WITH MEDIA
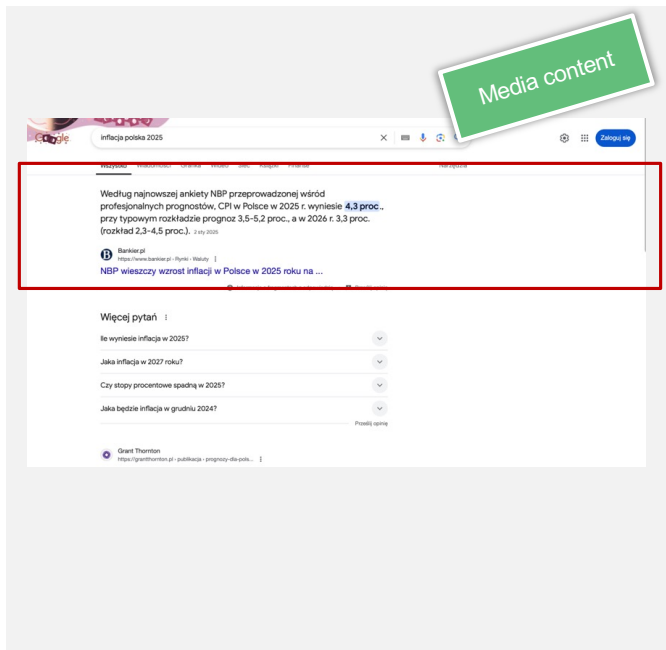
✘
WITHOUT MEDIA
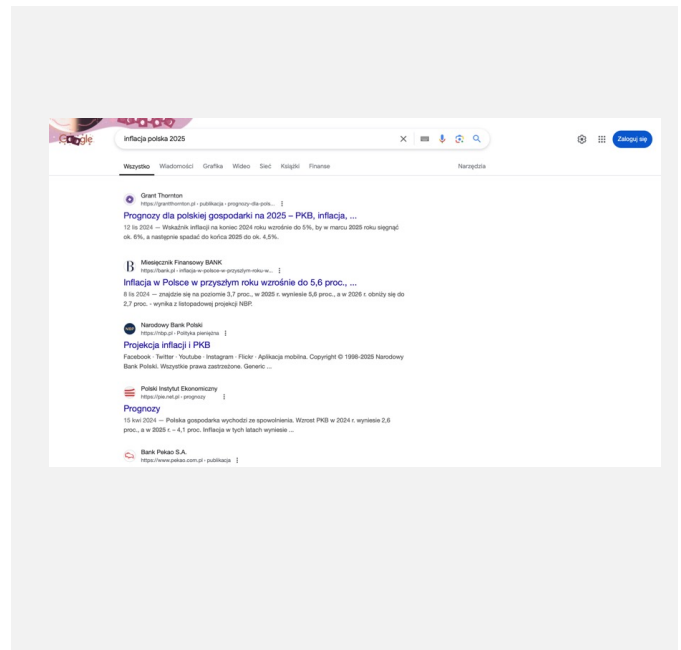
The most reliable sources of information in Poland

Which information sources do Polish people rely on most when looking for information?

Search engines are the dominant entry point for information in Poland. 78.3% of users rely on Google and other search engines—far ahead of social media or traditional media.

Hypothesis 1b: Which factors are important to Polish people looking for information?
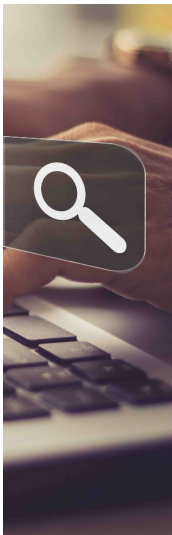
All factors play important roles for Polish people. Especially completeness, timeliness and quality are crucial.

93 **Trust:** Say it is important that they can trust the search results..

94 **Timeliness:** 94% want their search results to reflect current events.

95 **Completeness:** 95% say it is important that the information is complete.

92 **Comprehensibility:** 92% say the information should be easy to understand.

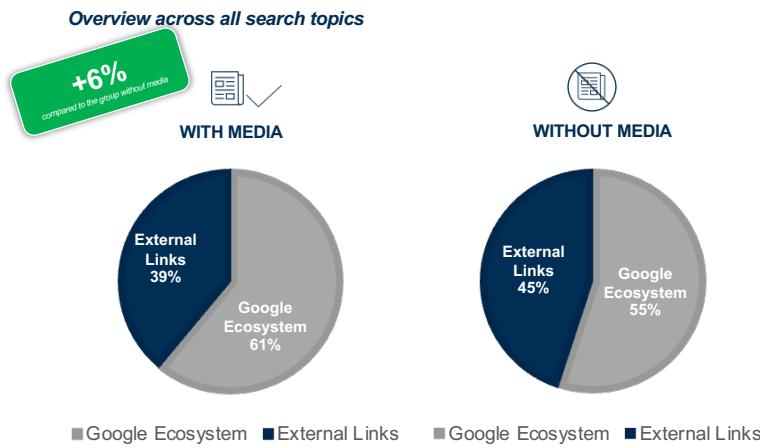**94** **Quality:** 94% want high-quality information.

93 **Independence:** 93% desire objective information.

Completeness, timeliness, and quality matter most to users when looking for information.

Hypothese 2: A Large Share of Users Remains Within the Google Ecosystem

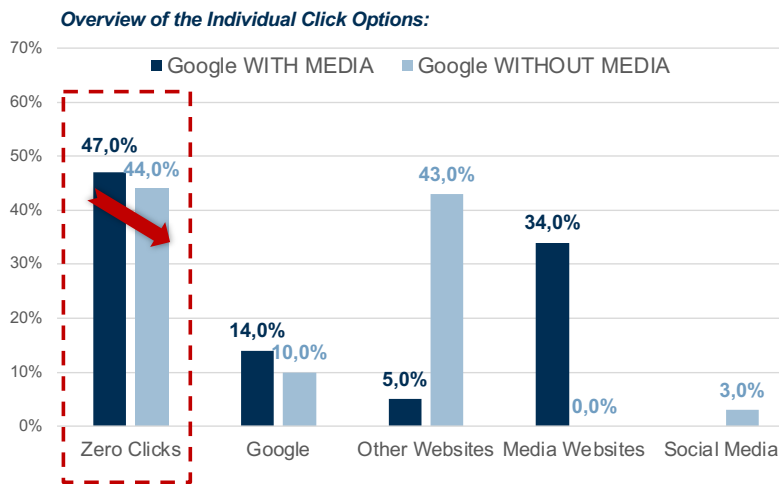*Do people stay within the Google ecosystem or do they click through to external websites?*

Overview across all search topics

+6%
compared to the group without media

WITH MEDIA

External Links 39%

Google Ecosystem 61%

WITHOUT MEDIA

External Links 45%

Google Ecosystem 55%

■ Google Ecosystem ■ External Links   ■ Google Ecosystem ■ External Links

─── **INSIGHTS** ───

- More than half of all clicks fall into the categories of "Zero Clicks" or the Google ecosystem.

- **Media content does not increase user** drop-off from the Google ecosystem – on the contrary, it contributes to user retention.

The majority of users either stay within the Google ecosystem or find what they're looking for without making a single click.
This happens regardless of whether media content is integrated or not.

But why is that?

How Are Clicks Distributed Across Categories?

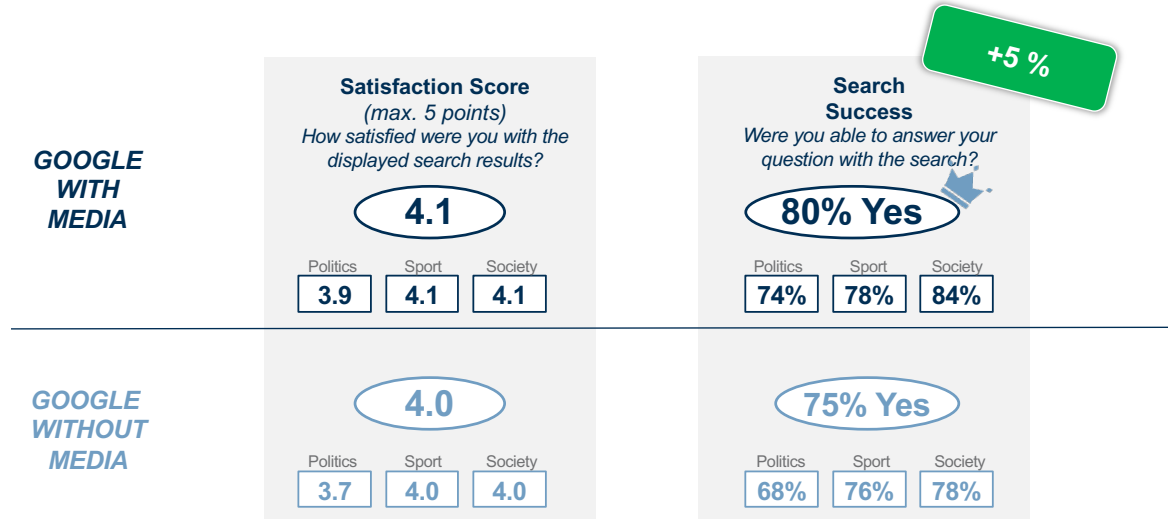*Deep Dive: Do People Actually Click on Google Products in Search When They Stay Within the Ecosystem?*

Overview of the Individual Click Options:

■ Google WITH MEDIA   ■ Google WITHOUT MEDIA

Category	WITH MEDIA	WITHOUT MEDIA
Zero Clicks	47,0%	44,0%
Google	14,0%	10,0%
Other Websites	5,0%	43,0%
Media Websites	34,0%	0,0%
Social Media		3,0%

─── **INSIGHTS** ───

- For informational searches, the majority of clicks fall into the Zero Clicks category (the answer is found directly, and the page is exited) and media content.

- Zero clicks occur more frequently when media content is integrated.

- Clicks on Google products (e.g., Maps, YouTube, etc.) is higher with media (14 %) than without media (10 %).

When media content is missing, users are more likely to leave Google and click on other external websites.
With media content, users either find their answers directly (zero clicks) or engage with media and Google content – increasing value within the ecosystem.

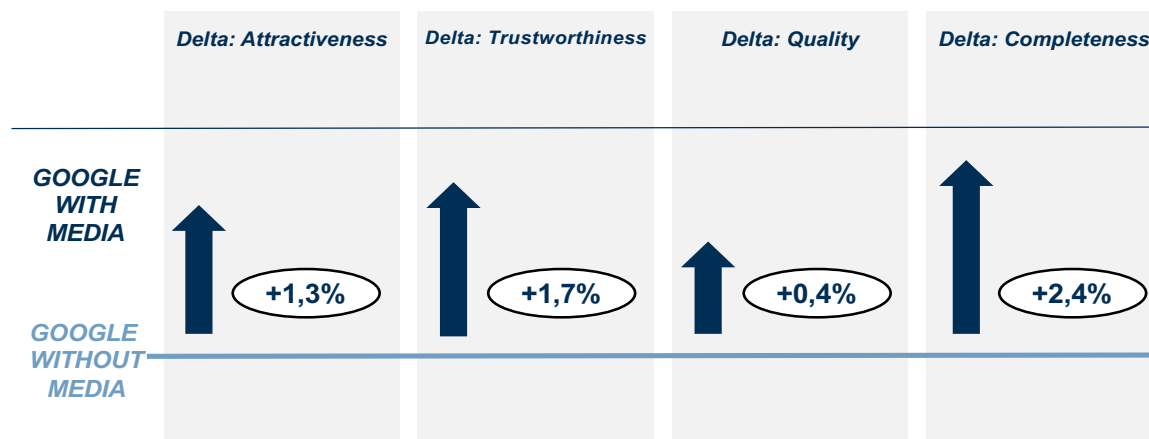## Is a Google without media less attractive and more frustrating? (I/II)

How satisfied are people with the search results? Do they provide a useful answer?

+5 %

	Satisfaction Score *(max. 5 points)* *How satisfied were you with the displayed search results?*	**Search Success** *Were you able to answer your question with the search?*
GOOGLE WITH MEDIA	**4.1**	**80% Yes**

	Politics	Sport	Society	Politics	Sport	Society
	3.9	4.1	4.1	74%	78%	84%

	Satisfaction Score	**Search Success**
GOOGLE WITHOUT MEDIA	**4.0**	**75% Yes**

	Politics	Sport	Society	Politics	Sport	Society
	3.7	4.0	4.0	68%	76%	78%

Participants who saw Google with media content showed a significantly higher success rate in answering their search queries.
While satisfaction scores were slightly higher, this difference was not statistically significant.

Is a Google without media less attractive and more frustrating? (II/II)

How much more attractive, trustworthy, high-quality & complete does media make Google appear?

Delta: Attractiveness	Delta: Trustworthiness	Delta: Quality	Delta: Completeness
+1,3%	+1,7%	+0,4%	+2,4%

GOOGLE WITH MEDIA

GOOGLE WITHOUT MEDIA

Integrating media into search results makes Google appear more attractive, trustworthy, high-quality, and complete to Polish users –
even if the differences are relatively small.

Attractiveness, Trustworthiness and Quality are higher with media content, but not statistically significant.
Completeness, however, is significantly higher with Google with media compared to Google without media.

Media content significantly boosts Google's perceived completeness and timeliness

	WITH MEDIA	WITHOUT MEDIA
QUALITY	5.1	4.9
COMPLETENESS	8.5	6.5
COMPREHENSIBILITY	8.1	7.4
TRUST	6.0	5.3
INDEPENDENCE	5.0	4.3
TIMELINESS	7.0	5.6

When media content is integrated into search results, Google is perceived as 31 % more complete and 25 % more timely.

These are not small cosmetic shifts — they reflect a substantial impact on core user expectations:

✓ That search results are comprehensive

✓ And reflect the current information landscape.

Media content improves users' perceptions of Google across almost all dimensions — especially **completeness, timeliness, and clarity**. However, perceived independence remains Google's weakest point, even with media integrated.

Negative Belief 1 2 3 4 5 6 7 8 9 10 Positive Belief

Hypothese 4: What do users prefer Google WITHOUT Media content or WITH Media content?

In response to the direct question

"Which version of the Google search would you prefer?",

the preference for the media-enhanced variant was significantly higher than chance (50:50)

Google WITHOUT Media Content

32%

Google WITH Media Content

68%

0% chose Google without media content

0%

100%

100% chose Google without media content
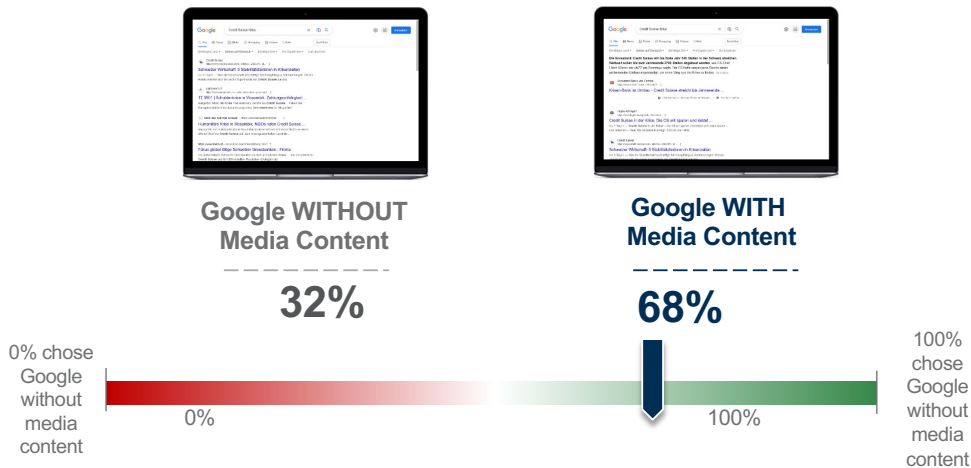
When explicitly asked which version of Google they prefer, a clear pattern emerges across topics: 68 % of participants indicate a preference for Google with media content.

Hypothese 4: What do users prefer Google WITHOUT Media content or WITH Media content?

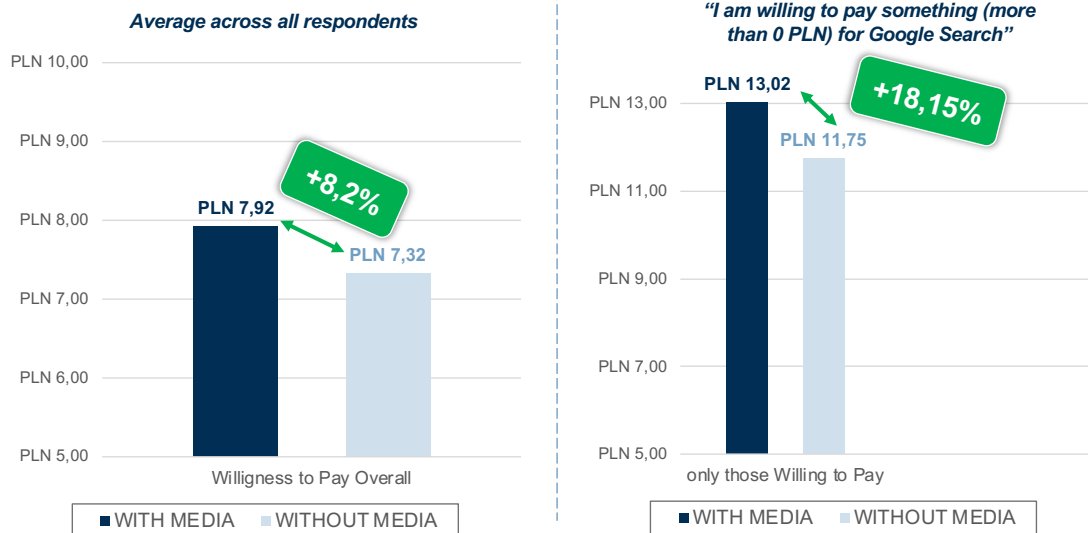*Would you be willing to pay a monthly fee for using Google Search?*

Google WITH Media　　　**Google WITHOUT Media**

61%　　　　　**59%**
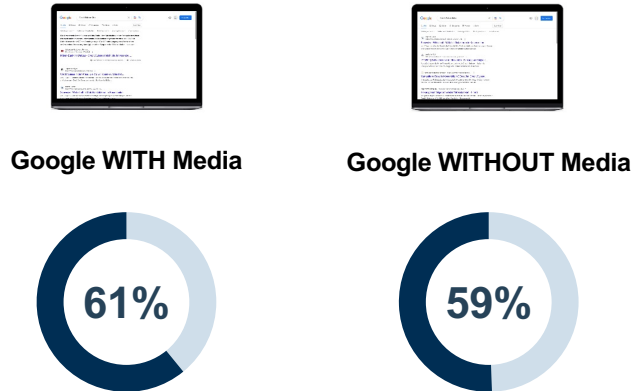
«I am willing to pay a monthy fee for using Google with Media content.»

> **More than 50% of Polish participants are willing to pay a monthly fee for Google's search services.**

Hypothese 4: What do users prefer Google WITHOUT Media content or WITH Media content?

"I am willing to pay something (more than 0 PLN) for Google Search":

Average across all respondents

PLN 10,00
PLN 9,00
PLN 7,92 **+8,2%**
PLN 8,00
　　　　　PLN 7,32
PLN 7,00
PLN 6,00
PLN 5,00
Willingness to Pay Overall

■ WITH MEDIA　■ WITHOUT MEDIA

"I am willing to pay something (more than 0 PLN) for Google Search"

PLN 13,02 **+18,15%**
PLN 13,00
　　　PLN 11,75
PLN 11,00
PLN 9,00
PLN 7,00
PLN 5,00
only those Willing to Pay
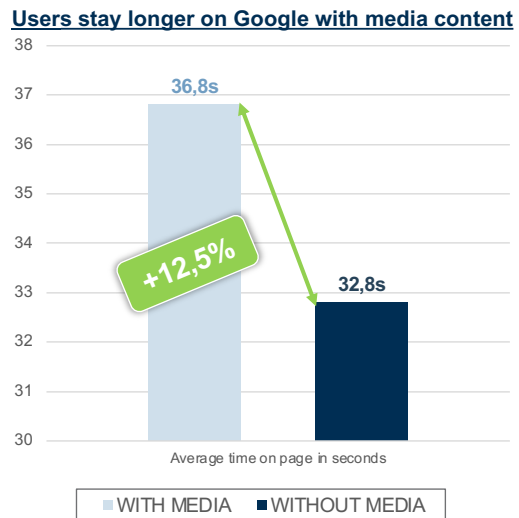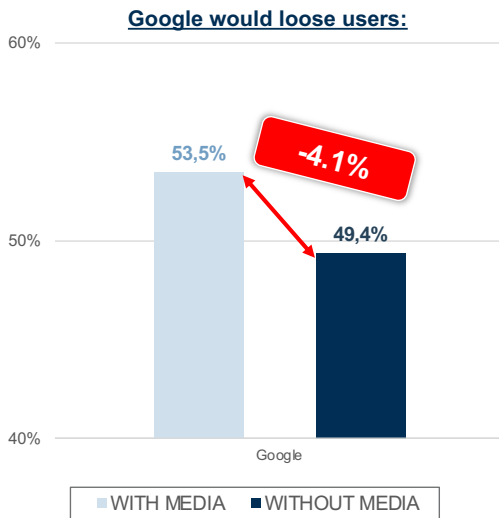
■ WITH MEDIA　■ WITHOUT MEDIA

> **In the eyes of users, Google Search WITH media content is worth 8,2% more than Google Search WITHOUT media content. The difference is even bigger with +18,15% under those who are willing to pay. This difference is statistically significant.**

26

Hypothese 5: Would Google loose clients if media content would be excluded from the Google Search results?

In a repeated search for information: Which channel would users choose now?

Google would loose users:

53,5%

-4.1%

49,4%

Google

■ WITH MEDIA ■ WITHOUT MEDIA

Users stay longer on Google with media content

36,8s

+12,5%

32,8s

Average time on page in seconds

■ WITH MEDIA ■ WITHOUT MEDIA

When media content is removed, 4.1% fewer users say they would choose Google again.
That's a relative decline of nearly 8% – a clear signal that media content helps retain user trust and loyalty in repeated search behavior. In addition user stay significantly longer on Google when media content is distributed.

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