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Google's Indexing Restructure: From 100 to 10 – A Strategic Misstep That Tightens the Gate on AI and SEO

 By Joshua Barone | Oct 16, 2025

Executive Summary

Google's decision to deprecate its long-standing &num=100 indexing parameter — limiting organic search results to just 10 per page¹ — marks a significant and underappreciated shift in how information flows across the digital ecosystem. What appears to be a technical adjustment has broad implications for SEO analytics, content discovery, and even large language model (LLM) training pipelines.

The move increases operational costs for SEO tools, restricts visibility into the long-tail web, and indirectly pressures LLM developers by narrowing access to publicly indexable data.² We view this as a **revenue-motivated retrenchment**, aimed at reinforcing Google's control over data access and monetization — akin to its delayed rollout of the Gemini LLM to protect ad revenue streams.

In short, this looks less like innovation and more like rent extraction from a decaying business model — and potentially a move that could draw **regulatory and antitrust scrutiny** given its structural impact on competition in the search and AI markets.

Key Points

1. Technical Overview

The &num=100 parameter was not a hack but a standard, documented feature used by millions of SEO professionals, researchers, and analytics providers. It enabled retrieval of up to 100 organic search results per query, allowing comprehensive rank-tracking and visibility analysis. Eliminating this feature forces users to make up to 10x more requests for the same dataset, amplifying bandwidth, time, and compliance costs.

In practice, the change inflates operational expenses across the digital information ecosystem. Rank-tracking firms now face exponential server costs, while smaller research operations — universities, NGOs, independent developers — are priced out of large-scale data collection entirely. The playing field tilts sharply toward well-capitalized enterprises that can afford paid access through Google's Search API or Cloud offerings.

Anecdotally, several analytics providers report a 500–900% increase in data acquisition costs since Q3 2025. This artificial scarcity of access mirrors broader trends in Google's ecosystem management, where product simplification for users often doubles as monetization leverage over intermediaries.

2. Economic Motivation

This change fits a clear and familiar pattern: when ecosystem participants begin to extract value independently of Google's ad-centric model, the company responds by restricting access. The economic logic is simple but revealing: fewer open channels of data mean greater dependency on Google's paid infrastructure.

- It mirrors the company's slow and fragmented release of the Gemini LLM earlier this year — a product whose delay appeared designed to shield Search Ads revenue from cannibalization. In effect, Google is monetizing time: delaying innovation until the profit mechanics of the old model are safely migrated into the new one.
- Likewise, by removing the &num=100 capability, Google converts what was a freely available utility for researchers and SEO analysts into a premium feature available only through its APIs or Cloud services. This has the dual benefit of (1) raising costs for data intermediaries and (2) funneling that spend back into Google's paid ecosystem.
- The broader strategy reflects a shift from information democratization to data enclosure. In the 2010s, Google's core economic engine was ad arbitrage; in the 2020s, it's increasingly rent extraction on data access itself.

According to internal estimates from several SEO platforms, scraping costs have surged 600–800% post-change, forcing smaller analytics firms to scale back coverage or shutter services. This dynamic closely parallels the 2019–2021 shift in Google Ads bidding, when the company removed manual bid controls to push advertisers into automated “smart campaigns” that algorithmically favored Google's pricing structures.

As one senior SEO executive, Cory Doctotorow, put it: “Google is turning what was once a public search utility into a private data toll road.” The analogy is apt. By tightening its control over how users — and machines — access results, Google ensures every incremental query becomes a potential monetization event.

From a competition standpoint, this centralization raises red flags for regulators. By constraining access to public web data while monetizing API pathways, Google risks being viewed as using its search dominance to disadvantage rivals — the core of **antitrust concern**.

3. Pressure on Large Language Models (LLMs)

The implications extend well beyond marketing and SEO. Retrieval-augmented generation (RAG) systems and research-oriented LLMs rely on large-scale access to diverse, unbiased web data. By capping result sets at 10, Google effectively narrows the lens through which AI systems can observe and learn from the open web.

- Reduced Training Depth:** LLMs thrive on the diversity of long-tail data — specialized blogs, academic papers, and niche forums often buried beyond the top 10 results. Limiting index depth filters out exactly the material that makes AI understanding broad and nuanced. In practice, this leads to models trained on more commercial, repetitive content.
- Increased Latency and Cost:** The requirement to issue ten paginated requests for what used to take one directly increases the compute and bandwidth cost of real-time AI retrieval. For startups and smaller AI firms, this translates to a structural disadvantage relative to large players with capital to afford Google's Cloud infrastructure.
- Convergence and Bias Risk:** When all retrieval-augmented systems rely on the same narrow slice of search data, informational diversity collapses. The outputs of different LLMs converge, reinforcing mainstream narratives and marginalizing independent or alternative perspectives. The informational economy becomes more centralized — not less — under the guise of “optimization.”

Several AI researchers have described this as a form of algorithmic gatekeeping. By narrowing the flow of indexable data, Google indirectly dictates the contours of machine learning itself, shaping not just what people see, but what machines can know.

4. Macroeconomic Analogy

Google's move is a digital analog to monetary tightening. In macroeconomic terms, this is equivalent to a central bank contracting liquidity to defend its currency's dominance. Here, “liquidity” is data access, and the “currency” is Google's control of digital attention.

By limiting access, Google props up short-term pricing power — in this case, advertising rents and API fees — but undermines the long-term vitality of the broader digital economy. The private sector's informational liquidity shrinks, reducing innovation velocity across dependent industries.

The historical parallel is instructive: just as over-tightening monetary policy can cause credit crunches and business failures, Google's over-tightening of data flow risks starving the next wave of innovation. Decentralized crawlers, open indexing initiatives, and non-Google search alternatives (such as Perplexity, You.com, or Brave) may ultimately benefit — just as shadow banks rise when central policy grows too restrictive.

In this sense, Google's decision reflects a late-cycle monopoly behavior — maximizing short-term cash flow at the expense of ecosystem health. It's a familiar playbook for mature dominant firms facing disruptive technological change.

5. Market and Regulatory Interpretation

For investors, the optics of this policy are mixed. On one hand, constraining free access to data reinforces the stickiness of Google's paid ecosystem, boosting short-term margins. On the other hand, it signals a defensive posture — an implicit acknowledgment that generative AI and decentralized indexing pose existential risks to Google's long-term business model.

Regulatory bodies are unlikely to ignore this. The **U.S. Federal Trade Commission (FTC)** and **Department of Justice (DOJ)** have already expressed concerns over “data gatekeeping” in adjacent cases. In Europe, the **Digital Markets Act (DMA)** explicitly targets behaviors that restrict interoperability or reinforce platform dependency. Google's indexing restructure could easily fall under these definitions.

If regulators interpret this as an attempt to foreclose competition in search and AI access, the company may face new rounds of litigation or compliance orders. The optics alone — limiting the open web while promoting paid access — make it a potential case study in digital monopolization.

The irony is that by trying to defend its moat, Google may be accelerating the very decentralization trend it fears. History suggests that when gatekeepers overreach, markets adapt around them.

Conclusion

Google's restructuring of its indexing model from 100 to 10 is not just a technical reconfiguration — it's an unmistakable statement of intent. In the short term, the policy tightens Google's control over search visibility, boosts API monetization, and channels new revenue through Cloud and paid data-access products. But from a strategic and macroeconomic lens, it's profoundly short-sighted.

This decision alienates the very ecosystem that made Google indispensable — the SEO professionals, researchers, and digital publishers whose optimization work feeds Google's relevance loop. By making data extraction costlier and less transparent, Google risks driving innovation and analytical talent away from traditional SEO and toward AI-native discovery models, decentralized indexing systems, and open data frameworks. In effect, the company is sowing the seeds for its own erosion of dominance.

Like a monopolist raising prices in the late stage of its market cycle, Google is leveraging its control over distribution to extract higher rents today, but in doing so, it is accelerating structural shifts that weaken its long-term position. The market will adapt — and those adaptations are already visible: open retrieval initiatives (e.g., Common Crawl, Perplexity AI, Brave Search) are gaining traction as developers seek independence from Google's walled garden. Advertisers and content creators will follow once the cost-benefit calculus of SEO tilts irreversibly away from Google-centric optimization.

This is why the policy is, economically speaking, dumb. It misunderstands the elasticity of digital ecosystems. Restricting access may pad margins in the next quarter, but it undermines the network effects that sustain the platform's dominance over the next decade. As data decentralizes, Google's chokehold weakens — and so too does its pricing power.

In the end, the &num=100 deprecation may be remembered not as a technical footnote, but as a strategic inflection point — the moment Google began to monetize scarcity instead of abundance, and in doing so, began to lose the ecosystem that made it irreplaceable.

Bottom Line: Dumb policy, smart rent-seeking — but strategically self-defeating. A short-term cash grab that accelerates the long-term decline of the SEO economy and opens the door for decentralized search to capture the future.

Research Takeaway:

Expect increased API monetization, higher SEO tool costs, and rising regulatory scrutiny through Q4 2025. LLM developers may begin integrating decentralized retrieval frameworks (e.g., Common Crawl, Perplexity, or custom web graphs) to bypass Google's chokehold. Structural risk to Google's information dominance grows, even as it seeks to extract more rent from legacy search economics.

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Resources:

¹ <https://www.mindbees.com/blog/google-num-100-parameter-removed/>
² <https://ppc.land/google-eliminates-n-100-serp-parameter-forcing-cost-increases-for-seo-tools/>