

A YEAR IN REVIEW



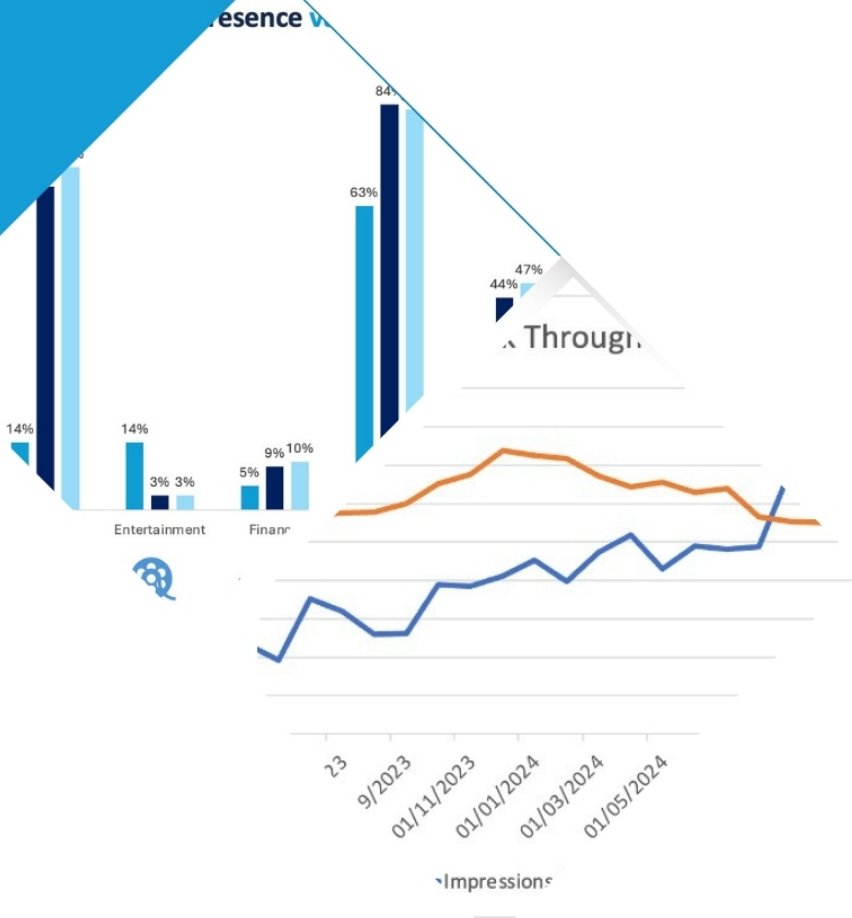
AI Overview

One year after the launch of Google’s AI Overviews (AIOs), BrightEdge data reveals a clear reality: search is not shrinking—it’s expanding.

Drawing on analysis using the BrightEdge Generative Parser™, this report shows how the AI search landscape has evolved across industries, query types, rankings, and SERP real estate.

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May 2025: BrightEdge Generative Parser(TM) Key Findings for Search Marketers

One Year After Google AI Overviews Launched

One year after the launch of Google's AI Overviews (AIOs), BrightEdge data reveals a clear trend: search isn't shrinking—it's growing. While some speculated that new AI search engines would cut into Google's market share, the data shows the opposite. Since the rollout of AIOs, users are turning to Google more than ever. In the 12 months since AIOs debuted, overall search **impressions for websites on Google have increased by 49%**. AIOs have expanded what search can do, enabling users to ask more complex questions and get deeper insights, which is driving greater engagement.

These changes are reshaping how brands should think about search's role in marketing. While the ability to get answers directly in the search results has led to a 30% drop in average click-through rates, it's also opening new opportunities. Brands can now earn impressions and even be recommended by Google before a user clicks.

Drawing on analysis using the BrightEdge Generative Parser™, this report shows how the AI search landscape has evolved across industries, query types, rankings, and SERP real estate. The data shows Google increasing AIO deployment across key verticals while pulling from a wider range of citation sources, many of which lie beyond the first page of traditional search results.

As AI Overviews enter their second year, marketers must prepare for new rules. Success now means optimizing for inclusion in the generative layer, not just ranking for clicks.

This research report includes eight key findings.

1. Search Activity Surges: AI Overviews Drive 50% Growth in Google Impressions
2. Healthcare, Education, B2BTech, and Insurance Dominate AIO Coverage
3. Complex Queries Surge: 7x Increase in 8+ Word Searches
4. Technical Vocabulary Up 48%: AI Handles Specialized Topics with Ease
5. Comparison and Ranking Queries Decline by Over 60%
6. Lower-Ranking Pages Are Being Cited More Than Ever
7. AIOs Now Take Up Over 1,000 Pixels—Full-Screen Real Estate
8. E-commerce AIO Growth Remains Flat—Still Limited Coverage

1: Search Activity Surges: AI Overviews Drive 49%+ Growth in Google Impressions

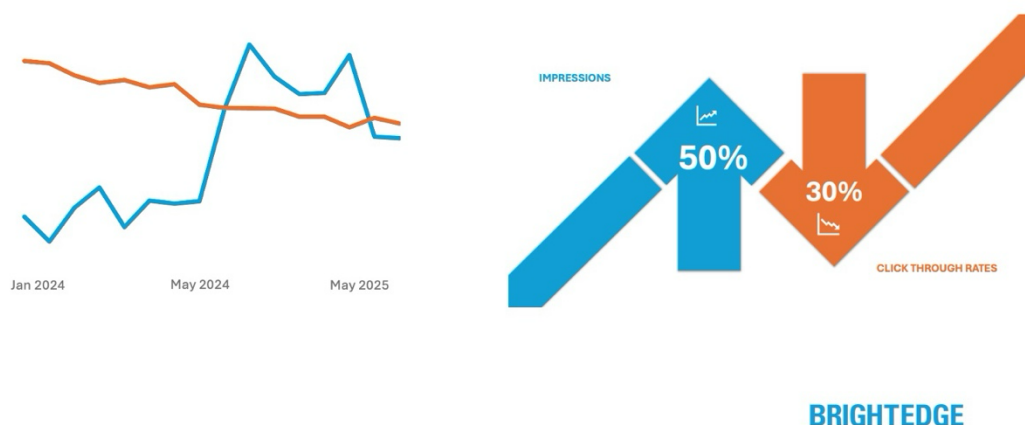
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Since the debut of AIOs in May 2024, total search impressions on Google have increased by over 49%, based on analysis across high-volume, AI-triggering keywords. This implies that users are searching more frequently and engaging with a broader array of queries, especially those that elicit rich, AI-powered summaries.

The most notable outcome: impressions surged but clicks did not follow at the same rate. In fact, CTRs declined by nearly 30%, as users increasingly consume information within the AI Overview itself.

This shift suggests the top of the funnel is expanding, while the traditional path to a website visit is narrowing. Visibility is no longer just about driving traffic—it's about being part of the AI experience before a user clicks.

Google's Surge and Shift: Impressions v Click Through Rates



2: Healthcare, Education, B2BTech, and Insurance Dominate AIO Coverage

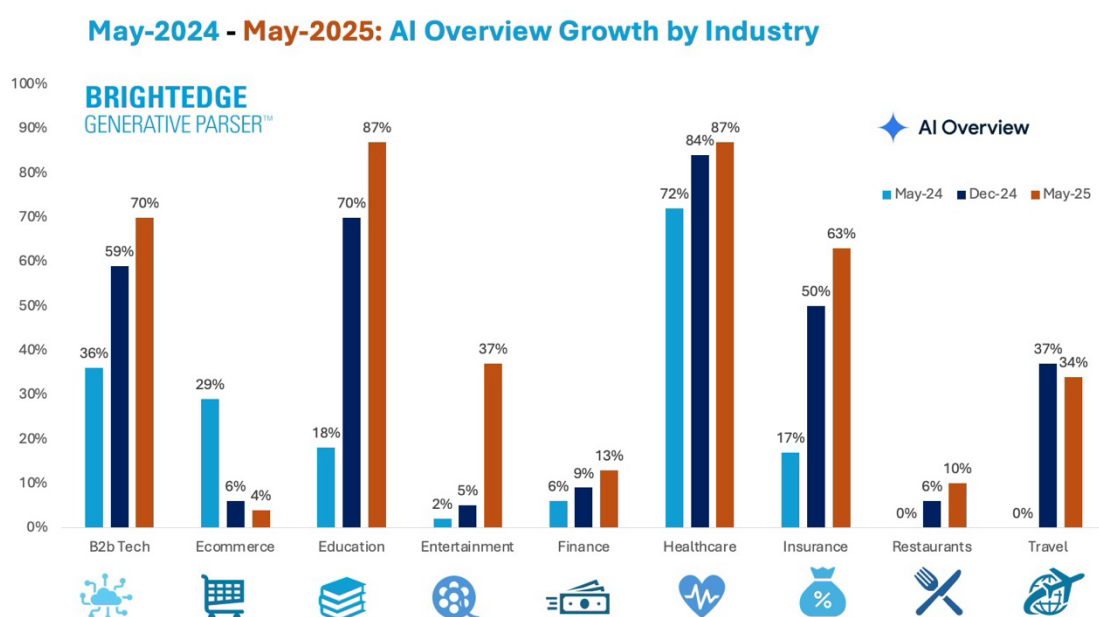
AI is no longer being cautiously tested—it's going all-in on the industries where authoritative, evergreen content matters most. We see sustained and accelerating AIO deployment across [Healthcare, Education, B2B Tech, and Insurance](#). These sectors now consistently show the [highest AI Overview presence](#), with some nearing [90% penetration](#) in queries by May 2025.

Why these categories? Each leans heavily on factual, structured content—ideal inputs for AI-generated summaries. These include medical definitions, degree explanations, software architectures, and policy comparisons. They are complex queries, and AI Overviews are proving to be highly effective at answering them.

The data speaks for itself:

- [Healthcare](#) and [Education](#) have reached near-complete coverage, growing from already high baselines.
- [B2B Tech](#) has steadily grown AIO presence from [40% to over 70%](#) in one year.
- [Insurance](#) queries have seen one of the steepest climbs in AIO coverage, jumping [3x](#) since May 2024.

This marks a [seismic shift in how users interact with high-stakes content](#)—and signals a critical opportunity for brands.



3: Complex Queries Surge: 7x Increase in 8+ Word Searches

Google users are embracing longer, more detailed queries

A major shift over the past year: AI Overviews are increasingly surfacing on **long, nuanced queries** that previously wouldn't have triggered rich results. Google queries with **eight or more words now generate AI Overviews 7x more often** than a year ago. We also see notable increases for long-tail queries with 4 and 5–7 words.

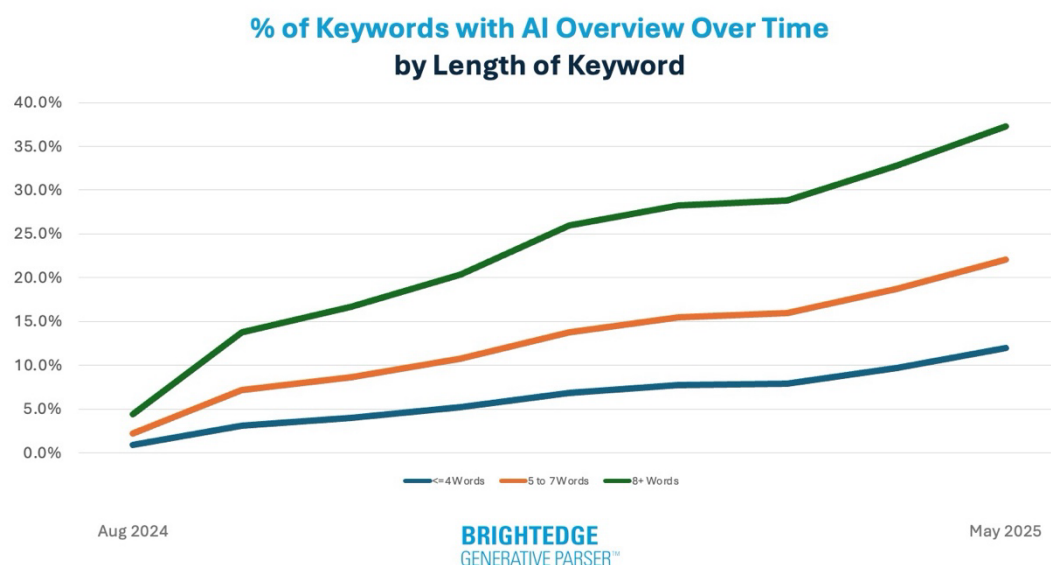
What's changed? AIOs have become better at addressing complex, conversational-style questions, offering coherent, complete answers to multifaceted prompts.

Example:

- **Then:** “solar panel efficiency” (no AIO shown)
- **Now:** “how to optimize solar panel efficiency in cloudy climates” (AIO present with detailed guidance)

This reflects a meaningful improvement in how the AI layer interprets and responds to specific user intent.

As AIOs continue to meet users where they are—with natural, contextual responses—we may see search behavior evolve further in this direction, mirroring the expectations of chat-based AI platforms.



4: Technical Vocabulary Up 48%: AI Handles Specialized Topics with Ease

Queries now include more precise, field-specific terminology

Queries now include more precise, field-specific terminology. Terms related to healthcare, AI, finance, and engineering have risen 48.3% year-over-year in search volume.

Examples:

- **Then:** "cloud storage"
- **Now:** "microservices infrastructure for hybrid cloud deployment"

This shift confirms that users expect AI Overviews to explain technical topics previously relegated to expert forums or niche resources. This means content must account for complex questions users may have - to be cited and potentially recommended, as AI Overviews help users find the products they need.

5: Comparison and Ranking Queries Decline by Over 60%

Once-dominant query types—like “best running shoes 2024” or “X vs Y”—are declining.

Once-dominant query types—like “best running shoes 2024” or “X vs Y”—are declining. Ranking-style and comparison queries are down 60.5% and 14.5%, respectively.

Users are letting AI handle curation instead of explicitly asking Google to compare. For example, instead of “best CRM software,” AIOs are deployed on broader or intent-rich prompts like “CRM tools for remote sales teams.”

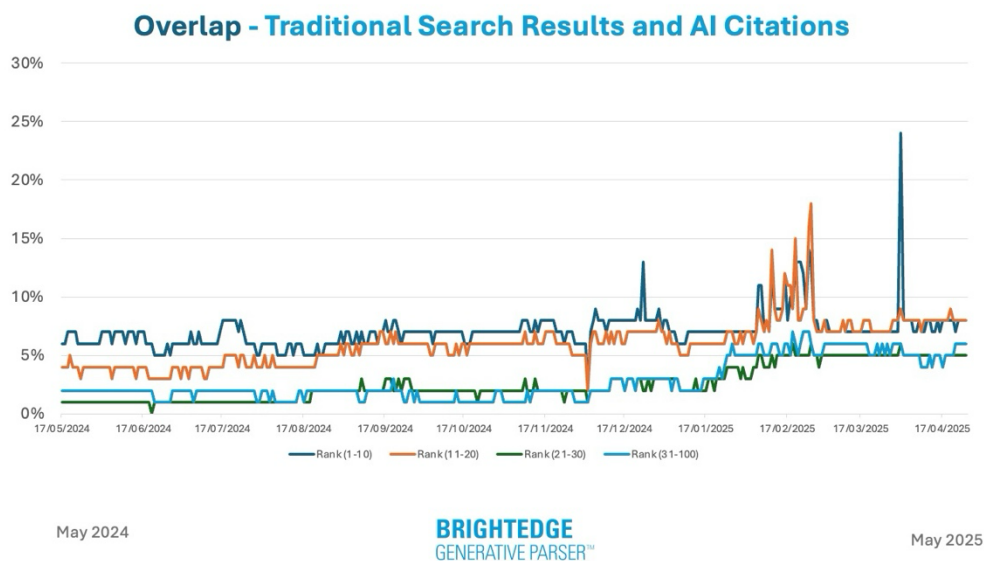
6: Lower-Ranking Pages Are Being Cited More Than Ever

Google has broadened its AI citation pool.

Google's AI Overviews are no longer just pulling from top-ranking pages—they're sourcing content from much deeper in the search results. Following the March 2025 Core Update, BrightEdge data shows:

- A **400% increase** in citation overlap from positions 21–30
- A **200% increase** from positions 31–100

89% of all citations in AI Overviews now come from URLs outside the top 10 organic rankings, a trend that has remained consistent throughout the year. This shift coincides with a notable surge in citation overlap during February 2025, up **24%**, which aligns with one of three major Google core updates this year. The February update serves as strong evidence that **Google's core algorithm directly influences AI Overviews**, reinforcing the company's 2024 guidance that AI and traditional ranking systems are deeply connected.



These changes signal a fundamental evolution in how brands must approach search strategy. Content that answers related sub-questions, clarifies complex topics, or anticipates user follow-ups has a real shot at being cited, even if it doesn't rank on Page. Even more telling: we're seeing measurable variability in citation sourcing, with a **1.91% standard deviation** for overlap from positions 11–20. This points to ongoing experimentation in how the AI determines what to surface. Winning in search means optimizing not just to rank but to be cited.

7: AIOs Now Take Up Over 1,000 Pixels—Full-Screen Real Estate

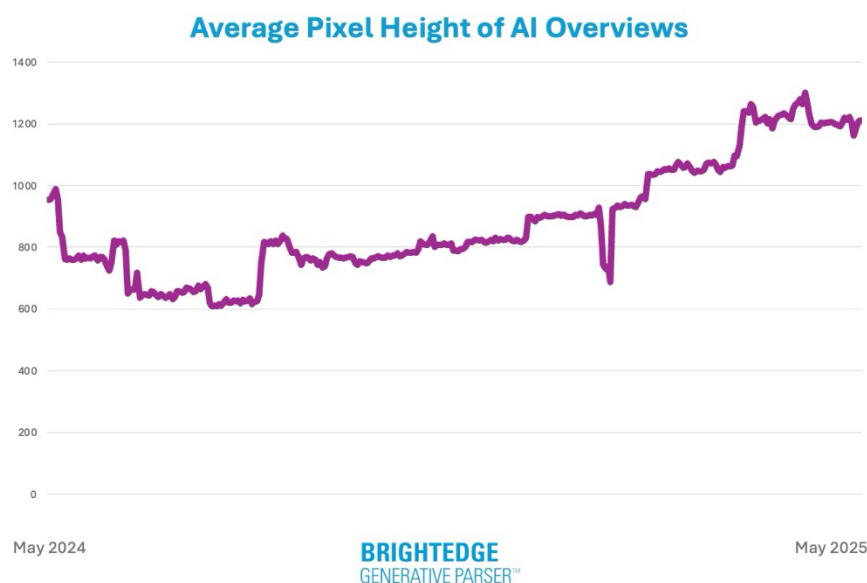
Especially for medical, financial, and how-to queries.

AI Overviews are rapidly reshaping the search experience, both visually and strategically. Today, they regularly exceed 1,000 pixels in height, particularly for medical, financial, and how-to queries. For comparison, 600 pixels is typically considered “above the fold,” meaning AI Overviews often dominate the user’s initial view.

This visual expansion represents a more than **40% increase in average size since July 2024.**

AIOs now commonly include bulleted lists, carousels, and multi-paragraph responses, pushing traditional organic results well below the fold. These results mention and even recommend brands creating critical opportunities for them.

For marketing and SEO leaders, this shift carries real implications. Visibility alone is no longer enough. Even a #1 organic ranking may be missed if the AI Overview commands the entire screen. Strategic approaches to address AI alongside traditional rankings are now essential to remain present and competitive in this evolving search landscape.



8: E-commerce AIO Growth Remains Flat—Still Limited Coverage

Despite the high volume of shopping queries, e-commerce AIO deployment remains limited. Retail-related searches show far fewer AI Overview appearances compared to informational queries.

This indicates that traditional search result features still offer the best shopping experience for users. It also underscores that while AI Overviews are reshaping the landscape for many industries, marketers can't afford to ignore traditional search results. These remain the dominant experience users rely on when they're ready to purchase.

Even now, Google is cautious about using AI to summarize products or influence purchases—likely due to trust, accuracy, and ad monetization concerns.

The Path Forward

Marketers Must Optimize for Inclusion, Not Just Rank

The path forward is clear:

- Don't just chase Page 1 rankings—create content that the AI can extract, synthesize, and cite.
- Use structured headings and direct answers.
- Focus on context, clarity, and topical authority—not just keywords.
- Monitor visibility inside AI Overviews using BrightEdge Generative Parser™.

In the AI search era, visibility begins before the click.

Conclusion

From Rank to Reach—The New Rules of Search

One year into Google's AI Overviews, the data tells a clear story: AI isn't disrupting Google—it's accelerating it. While new discovery platforms like ChatGPT and Perplexity are gaining attention, BrightEdge Generative Parser™ data confirms that Google remains the most influential discovery engine in the AI era—and it's expanding.

Search activity has surged, with [Google impressions up over 49%](#) since May 2024. At the same time, [click-through rates have fallen 30%](#), as users engage more deeply with on-page, AI-powered summaries. The implications are significant:

- SEO is no longer just about ranking—it's about [being recommended and cited](#)
- AI Overviews are elevating long-tail, technically focused content, with [48% more technical terms](#) and [49% more complex queries](#) now triggering responses

- Pages previously buried past position 20 are gaining visibility, thanks to a **400% increase in citations from ranks 21–30**
- The SERP is evolving visually, too—AIOs now span **1,000+ pixels**, dominating above-the-fold space

This isn't just an algorithmic change—it's a fundamental shift in user behavior.

People are searching more, asking deeper questions, and relying on AI to curate and summarize the best insights.

And while AI agents are emerging, Google continues to be where brand visibility is shaped.

The new rules of search are not about abandoning what worked before—they're about evolving it.

BrightEdge will continue to monitor and lead the community in this new landscape with the Generative Parser™.

The Ultimate Guide to Google AI Overviews

Last updated July 10, 2024

<https://www.brightedge.com/ai-overviews>

