



# GOOGLE AI OVERVIEWS

## NOVEMBER - DECEMBER INSIGHTS

### PREPARING FOR THE YEAR AHEAD IN 2025

- 1) THE STATE AND STABILIZATION OF AI OVERVIEWS
- 2) INDUSTRY EVOLUTION AND AIO PRESENCE

E-commerce | Travel | B2B Tech | Healthcare | Insurance  
Formats | Patterns | Query Types | Content and Authority



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# November – December 2024: AI Overview Trends

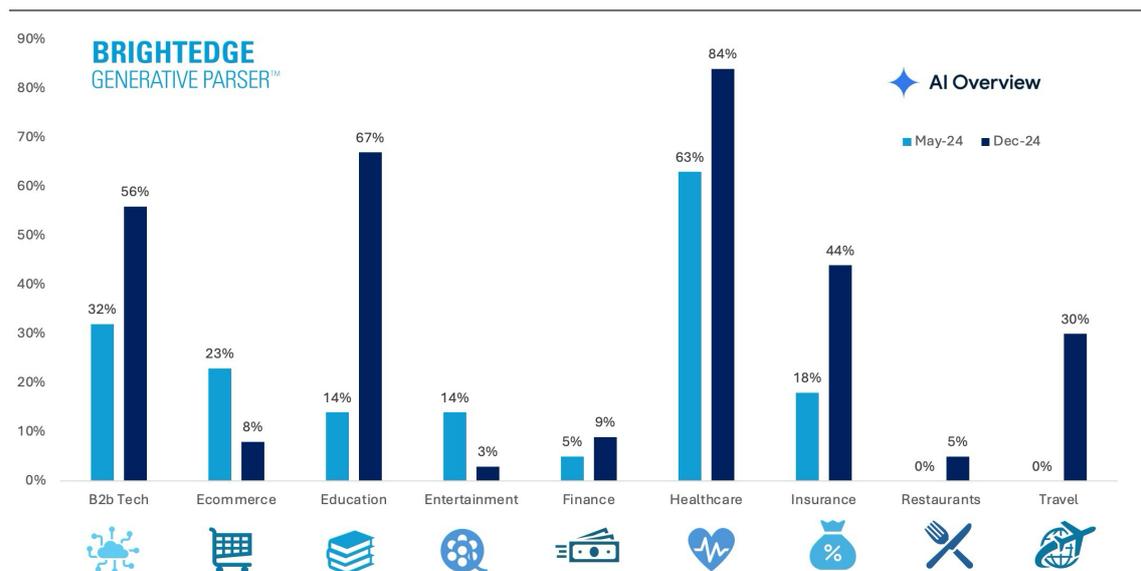
## Industry Evolution and the Content Authority Shift

As we move deeper into Q4, November's data reveals significant maturation in Google's AI Overviews (AIOs), with clear patterns emerging across industries and content types. Fresh [BrightEdge Generative Parser™](#) insights showcase industry-specific evolution and strategic shifts in how Google selects and presents AI-enhanced results.

### Part 1: AIO Evolution

1. Sustained Growth and Decreased Volatility Show AIO Maturation
2. YouTube Citations Find New Baseline with Steady Growth
3. List Features in AI Overviews Show Major Structural Changes

Since Its Launch in May 2024 Google's Use of [AI for Search](#) Is Growing Across Most Industries



### Part 2: Industry Focus

1. E-commerce AIOs Dynamically Evolved Over the Holidays
2. The Travel Sector Stabilizes After a Huge October Surge
3. The B2B Tech Sector Experiences Dramatic Content Evolution
4. Healthcare Experiences Strong Authority Consolidation
5. The Insurance Sector Experiences the Most Focused Authority Shift

## Part 1: AIO Evolution

### ◆ AI Overview

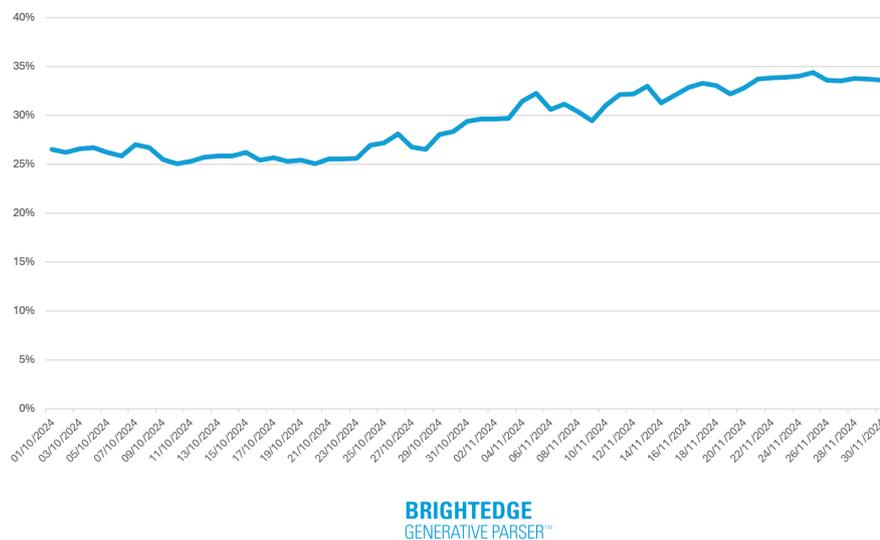
#### 1. Sustained Growth and Decreased Volatility Show AIO Maturation

**Volatility** is calculated by measuring the day-to-day fluctuations in AIO

November marked a significant growth and stabilization period for AI Overviews, with overall presence increasing from 29% at the start of the month to 33% of keywords by the end.

Most notably, volatility, calculated by measuring the day-to-day fluctuations in AIO presence, decreased to 4.22% (compared to October's  $\pm 6.4\%$ ), indicating more predictable and stable AIO behavior. This increased presence and stability suggests that Google has refined its criteria for when and how to present AI Overviews, making it easier for marketers to plan and optimize their content strategies.

#### AIO Presence: October to December 2024



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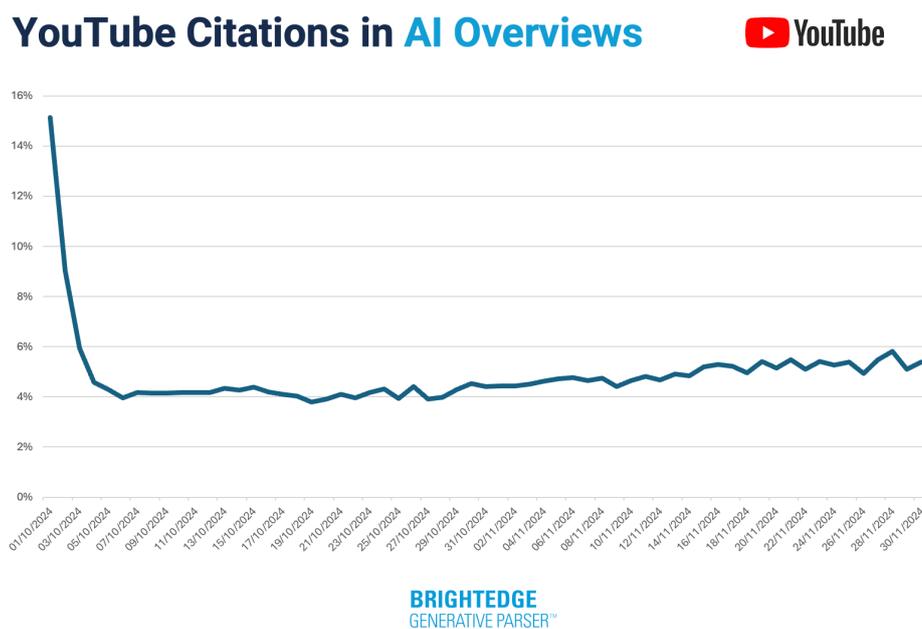
**Actionable Insight:** Take advantage of this increased stability to develop longer-term AIO optimization strategies in 2025. With volatility down to 4.22%, marketers can more confidently invest in content development, knowing that AIO behavior has become more predictable.

## 2. YouTube Citations Find New Baseline with Steady Growth

After a dramatic spike in October, reaching nearly 15%, YouTube citations experienced a sharp decline, quickly stabilizing at around 4% by mid-October. This new baseline has proven stable, with the platform showing modest but consistent growth through November, averaging 0.2-0.3% increases week-over-week. This steady state represents YouTube's "new normal," reflecting Google's refined approach to incorporating video content in AI overviews.

One crucial aspect observed last month was that many YouTube citations leverage specific video segments without requiring full transcripts, allowing for precise, contextual references to video content.

This capability reflects the true multi-modal nature of Gemini (the AI that powers AI Overviews). The sustained 4-5% citation rate suggests Google has found an optimal balance for utilizing YouTube as an authoritative source within its AI systems.



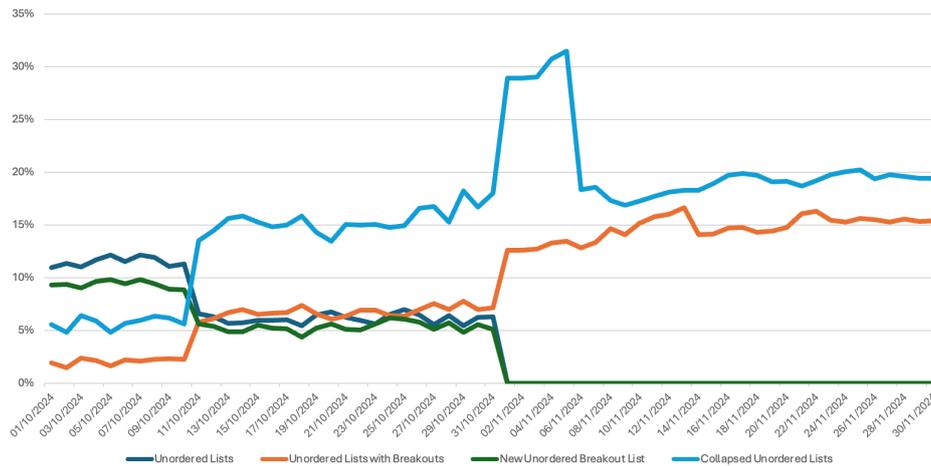
**Actionable Insight:** With YouTube citations now consistently representing 4-5% of AI Overview sources, marketers should prioritize creating video content that directly addresses common product and educational queries. Unboxing videos and tutorials should explicitly answer key customer questions about features, usage scenarios, and product comparisons, making them valuable citation sources for AI Overviews. Structure your videos with clear topical segments to make them more citation-friendly and identify the most relevant questions your content should address. This targeted approach ensures your video content

aligns with the queries AI Overviews will likely seek to answer, maximizing your content's potential for citation and visibility.

### 3. List Features in AI Overviews Show Major Structural Changes

November revealed significant evolution in how AI Overviews structure and present content

## List Types Used in AI Overviews



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#### List Feature Growth:

Collapsed Unordered lists started at 17% of all features at the beginning of the month, saw a dramatic spike, and ended at 20% of the features in AIOs.

Unordered Lists with Breakouts accounted for 7% of features at the beginning of the month, but by the end, they had more than doubled, accounting for 15% of the features detected in AI Overviews

The screenshot shows a search result for 'blockchain' on a platform. The search bar contains 'blockchain' and navigation options like 'All', 'Images', 'News', 'Videos', 'Shopping', 'Web', 'Forums', and 'More'. Below the search bar are filters for 'Login', 'Meaning', 'Example', 'Wallet', 'App', 'Crypto', 'Course', 'Stock', and 'Technology'. The main content area features a 'Search Labs | AI Overview' section with a 'Learn more' link. The overview text defines blockchain as a decentralized, public digital ledger and lists several applications: tracking transactions, tracking intellectual property, sharing records, and reducing paper-based processes. A bulleted list highlights key features: Decentralized, Immutable, Peer-to-peer, and Distributed timestamping. At the bottom, there is a disclaimer: 'Generative AI is experimental. For financial advice, consult a professional.' and a set of interaction buttons: 'Export', 'Save', and social media icons.

**Actionable Insight:** Ensure your content strategy favors list-based formats. The data suggests that the content that is used in this format is critical, with a 130-150% growth rate. Prioritize creating content that can be naturally organized into hierarchical lists and collapsed sections to align with AIO's clear structural preferences

## Part 2: Industry Focus

### 1. E-commerce Shows Dynamic Holiday Adaption

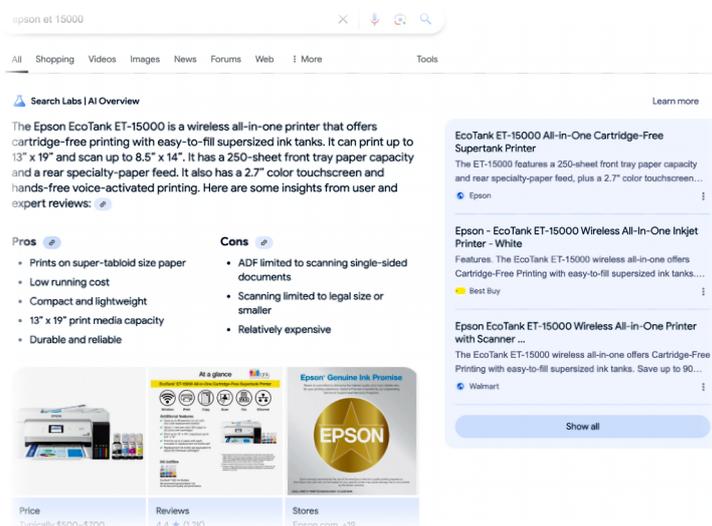
While experiencing the highest volatility among all sectors, eCommerce demonstrated fascinating evolution through November, particularly during the Black Friday period. Overall monthly metrics showed a complex pattern:

- Early November peak: **+40%** from mid-October low
- Mid-month stabilization around a traditional baseline
- Late November transformation aligned with Black Friday

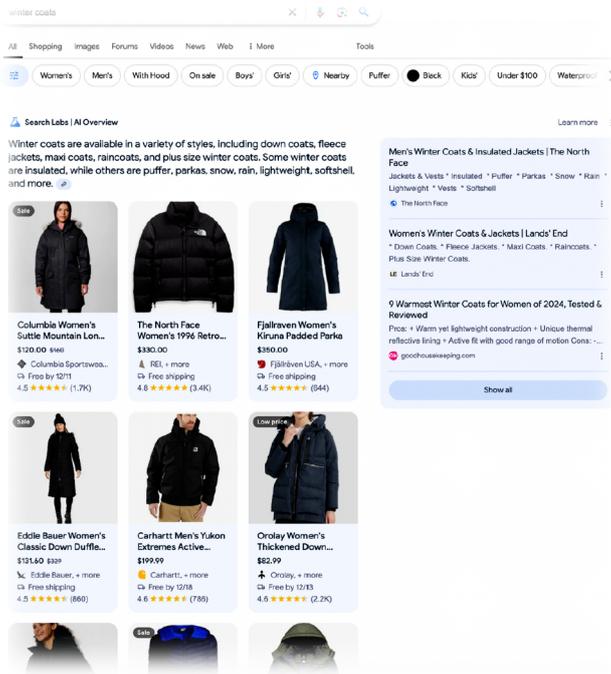
Most notably, the Black Friday/Cyber Monday period revealed AI's ability to dynamically adapt to shopping-focused user intent.

Traditional list-based formats dominated pre-holiday results and saw a sharp decline (**-9.8%** on Black Friday, with an additional **-7.6%** drop by November 30). In their place, we witnessed the emergence of more sophisticated, shopping-oriented presentations.

**Product Viewers** with more information about the product and buying options, such as below, increased by **52.6%**.



Additionally, group product views increased by **8.2%**, showing that AI Overviews are better at identifying shopping queries where users benefit from comparing multiple items at once - particularly for price comparisons and finding the best product fit.



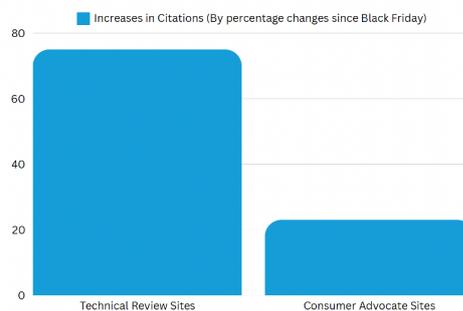
## Changes in citations for Ecommerce throughout November

- Specialty/niche review sites: **+75% increase**
- Technical review sites: **Increased from 35% to 45% of citations**
- Consumer review publications: **Decreased from 30% to 20%**
- Manufacturer direct citations: **-37.5% decrease**
- News/editorial sites: **-40% decrease**

## Sources in AI Overviews

### E-commerce Black Friday and Cyber Monday

#### Sources got more specialized



As AI Overviews became more elaborate, their citations shifted toward specialized sources. Sites like [rtings.com](#) and [consumerreports.org](#) saw significant spikes (+71.4% and +23.9%) during the holiday weekend, showing AI's growing reliance on expert product information.

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## Changes in the structure of E-commerce AIOs in November.

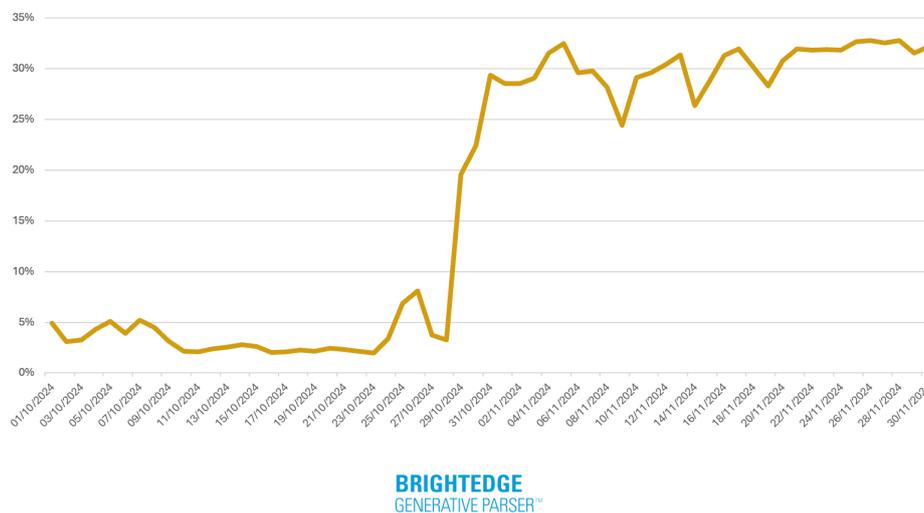
- Advanced product viewing features: **+52.6%** during peak shopping period
- Technical analysis: **+50%** (from 20% to 30%)
- Product reviews: **+33%** (from 45% to 60% of content)
- Buying guides: **-29%** (from 35% to 25%)

**Actionable Insight:** Invest in detailed technical product reviews and analysis content, which saw increases of 33% and 50%, respectively. Focus on developing specialty review content rather than general buying guides, particularly during peak shopping periods

## 2. After a Late October Surge, Travel AIOs Began to Stabilize

Following October's remarkable **700%** growth, November demonstrated the travel sector's successful stabilization and maturation. Rather than dropping back from October's surge, travel-related AIOs maintained elevated levels for keywords, suggesting Google's confidence in the sector's expanded coverage. These queries continue to pertain to things to do in locations.

### Travel: AIO Presence



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Most notably, November showed a clear evolution in source preferences:

- Reference/encyclopedia sites: **+450%** increase in citation share
- Official tourism sites: **+300%** increase in share
- Traditional review sites: **+380%** increase
- Commercial booking sites: **+50%** increase (with **200%** higher volatility)

- Social media: -25% decrease in relative share

Source distribution also evolved significantly:

- Local/Regional Sites: Grew from 5% to 15% of citations (+200%)
- State Tourism Boards: Increased from 2% to 8% (+300%)
- Commercial Travel Sites: Showed a U-shaped recovery, dropping from 8% to 3% before recovering to 12% by late November

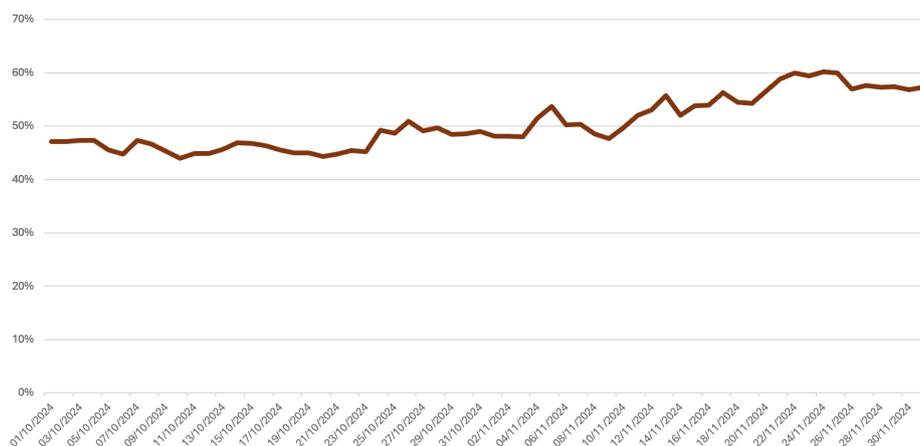
**Actionable Insight:** Focus on creating detailed local destination content, particularly for under-represented areas. The data shows that activity-focused queries ("things to do," local attractions, seasonal events) are driving AI Overview citations, with local and regional sites seeing a 200% increase in citation rates.

Prioritize comprehensive area guides that blend specific activity recommendations with authoritative information from tourism boards, as these combined content types are proving most valuable for AI Overviews.

### 3. B2B Tech Shows Most Dramatic Content Evolution

B2B Tech emerged as November's most transformed sector, with a 31.9% monthly growth and dramatic shifts in query types and content preferences:

#### B2B Tech: AIO Presence



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Changes in AI Overview Presence:

- Comparison queries (vs, versus) surged +65%
- "What is" queries increased +45% (from ~15% to ~22% of total queries)

- Definition/explanation queries grew +35%

#### Topic Category Growth:

- Security-related keywords increased +55%
- Data-related keywords grew +40%
- Development/DevOps terms expanded by 42%
- Infrastructure keywords rose +38%

#### Most notably, the sector showed clear preference shifts toward advanced content:

- Technical certification queries increased by +70%
- Compliance-related terms grew +62%
- Implementation-specific queries rose +45%
- Basic concept queries decreased by -15%

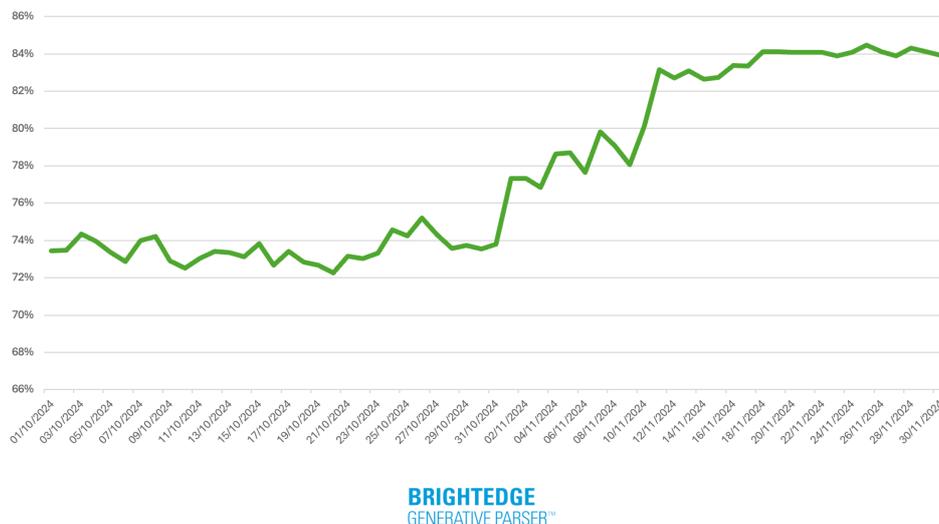
**Actionable Insight:** For B2B tech companies, particularly in security, data management, and DevOps sectors, developing advanced technical content is crucial for AIO visibility. With basic concept coverage down 15%, focus on creating detailed technical documentation structured in digestible formats: concise paragraphs with clear summaries, direct answers to complex implementation questions, and step-by-step technical procedures. LLMs favor content that presents sophisticated technical concepts with explicit problem-solution frameworks, clear architectural explanations, and specific use-case examples.

## 4. Healthcare Demonstrates Strong Authority Consolidation

**Healthcare continues to dominate the presence of AI Overview across all industries**, driven by its extensive use of authoritative sources. The sector demonstrated this authority-first approach with 15% growth in high-quality citations and remarkable stability ( $\pm 0.5\%$  daily variation in late November after the November 12 increase).

This consistent reliance on authoritative medical sources reinforces Healthcare's position as the industry generating the highest volume of AI Overviews, setting a benchmark for how AIOs leverage trusted expert content.

## Healthcare: AIO Presence



The sector showed clear preferences for established medical authorities:

### Changes in the sources cited by AIO's in November:

- Major clinic sites: **+15.6%** (from **45%** to **52%** of citations)
- Academic medical centers: **+25%** (from **12%** to **15%**)
- International health services: **+50%** (from **8%** to **12%**)
- Commercial health portals: **-28%** (from **25%** to **18%**)
- Government health sites: **-20%** (maintained authoritative status)

### Changes in the type of content being cited by AIOs:

- Clinical content: **+15.6%**
- Patient education: **+10%**
- Research content: **-20%**
- Video content: **-15%**

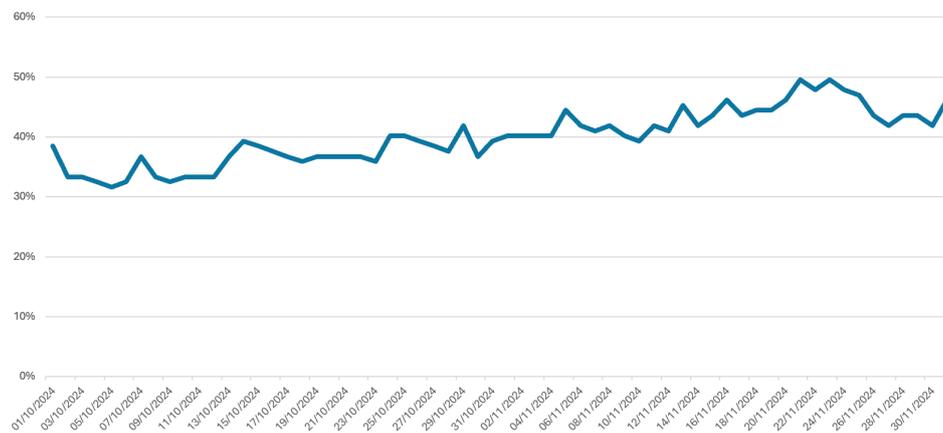
**Actionable Insight:** Prioritize partnerships with established medical institutions, as major clinic citations increased by **15.6%**. For marketers, this may include link budling relationships through citations or PR efforts. Focus on creating clinical content and patient education materials while reducing reliance on commercial health portals, which saw a **28%** decrease in citations.

## 5. Insurance Shows the Most Focused Authority Shift

The insurance sector demonstrated the most concentrated evolution toward official sources and significantly reduced volatility compared to other industries with a clear preference for authoritative content. Citation Patterns:

- Government portals: +28.6% (from 35% to 45% of citations)
- International resources: +80% (from 10% to 18%)
- Professional resources: +50% (from 8% to 12%)
- Employment-related government sites: -25%
- Commercial job sites: -20%

### Insurance: AIO Presence



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**Actionable Insight:** Focus on professional certification and regulatory compliance content that will help appeal to what AIOs are focusing on.

## Key Takeaways for 2025

### Industry-Specific Strategic Priorities

**Travel's** dramatic 700% growth and shift toward authoritative sources demands focus on detailed local destination content, particularly as local/regional sites saw a 200% citation increase. Create comprehensive area guides that help AI Overviews guide users on how to plan and spend time during their travel.

**E-commerce's** sophisticated holiday adaptation shows AIOs evolving to match shopping behavior, with product viewers increasing by 52.6% and specialized review content growing by 75%. Prioritize detailed technical product reviews and analysis content rather than general buying guides, especially during peak shopping periods.

**B2B Tech's** 31.9% monthly growth and clear preference for advanced content (70% growth in technical certification content) signals the need for sophisticated technical depth. Focus on creating detailed documentation with clear problem-solution frameworks and implementation guides, as basic concept coverage decreased by 15%.

**Optimize for Authority Signals:** November's data reveals dramatic shifts toward authoritative sources across all sectors. Healthcare showed a 15.6% growth in major clinic citations, while insurance saw an 80% increase in international resource citations. Focus on building authority through:

- Collaboration with recognized industry experts
- Integration of professional certification content
- Development of comprehensive technical documentation
- Partnerships with academic and professional institutions

**Factor Structural Evolution into your content strategy:** The dramatic increase in list features (130-150% growth in unordered lists) suggests a clear shift in how AIOs present information. Structure content with clear hierarchical organization, using detailed breakdowns and systematic approaches.

### Conclusion

November's data reveals a significant maturation in AI Overviews, with a clear evolution toward technical depth and authoritative sources. The **15.63%** monthly growth combined with reduced volatility (4.22% compared to October's 6.4%) indicates a more predictable

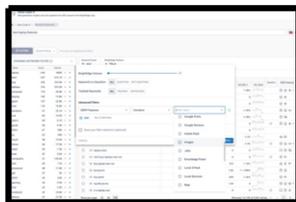
and sophisticated system. This maturation presents opportunities and challenges for organizations seeking to maintain visibility in AIOs.

The data shows that success in 2025 will require a dual focus: building deep technical authority while maintaining agile response capabilities to feature evolution. Organizations that balance these requirements while maintaining consistent quality will be best positioned to capitalize on AIO visibility opportunities.

Organizations must track these evolving patterns at a granular level, identifying specific opportunities within their sectors. This becomes particularly crucial as AIOs continue showing increasing sophistication in selecting and presenting content. As we move into the new year, this level of insight will be essential for maintaining a competitive advantage in an increasingly complex search landscape.

## Staying Ahead of AI Overviews Directly in BrightEdge

Marketers can see AIO Overviews evolve directly in real time on our platform. BrightEdge offers multiple ways to track AI Overviews, so marketers are equipped to navigate the landscape and drive holiday season success.



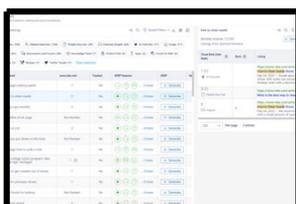
### Pre-Planning

Data Cube X provides the most comprehensive keyword set of any platform. Plan your strategies by seeing which keywords have AIO's present



### During a Campaign

Once tracking keywords, keyword reporting monitors for when AIO's appear. Use anomaly detection to alert you when an AIO is detected on keywords you are targeting!



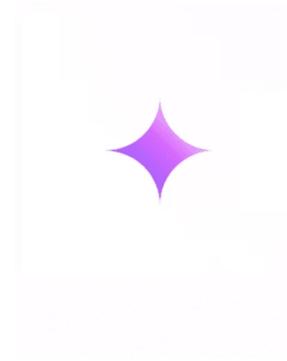
### In Real-Time

BrightEdge Instant's Real-Time Rankings allow you to investigate citations and see how AIO citations are changing in real time. Useful for critical times such as Cyber Monday or Black Friday!

View all our recent findings and stay current on how to succeed with AI Overviews in the BrightEdge Ultimate Guide to AI Overviews.

## The Ultimate Guide to Google AI Overviews

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