GOOGLE AI OVERVIEWS AND
E-COMMERCE

WHAT TO EXPECT FOR BLACK FRIDAY AND CYBER MONDAY

A glimpse into new AIO trends and how to prepare for the holiday season

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New AI Overview Trends: What to Expect for Black Friday and Cyber Monday

As we move into the final stretch of 2024, AI Overviews (AIOs) continue to evolve. September brought significant shifts in how AIOs appear, giving us critical insights into what might unfold as we approach the holiday season.

BrightEdge Generative Parser™ offers glimpses into what we can expect and how to prepare for Friday and Cyber Monday. From the stabilizing nature of shopping queries to the increasing presence of YouTube citations, preparing ahead becomes a priority as AI evolves month by month.

This research report includes seven key findings.

1. YouTube Citations Explode in Popularity

E-commerce-related YouTube citations increased by 121%

2. Shopping Queries that Show AIOs Are Gradually Stabilizing

Volatility in shopping queries is decreasing, indicating a more predictable environment

3. Collapsed Content Features on the Rise for Shopping Terms

Google leans into compact and user-friendly presentations for dense product information.

4. Larger AI Overview Panels for E-commerce

The average height of e-commerce AIOs grew by over 40% from August to September

5. AIO Presence in E-commerce Queries Drops

Google is balancing AIO and traditional organic search e-commerce content

6. Rank Overlap between Organic and AIO Citations Dropped Significantly for Shopping Keywords

High-ranking content is increasingly likely to be featured in AI Overviews

7. Key Product Comparisons Maintain Importance

Stability shows that Google continues to value product comparisons

Key Takeaways for Marketers and the Holiday Shopping Season

AIO Insights in the BrightEdge Platform

1: YouTube Citations Explode in Popularity

E-commerce-related YouTube citations increased by 121%

One of the most dramatic changes in September was the explosive growth in YouTube citations within AI Overviews. Citations for general queries rose by over 300% since the beginning of August (200% alone in September), while e-commerce-related YouTube citations increased by 121%, highlighting the growing importance of video content in AIOs.

We've witnessed numerous adjustments and fine-tuning to results, which we've tracked in our Ultimate Guide to AI Overviews.

AI Overviews with at least 1 YouTube Citation

August 1, 2024   BRIGHTEDGE GENERATIVE PARSER™   October 1, 2024
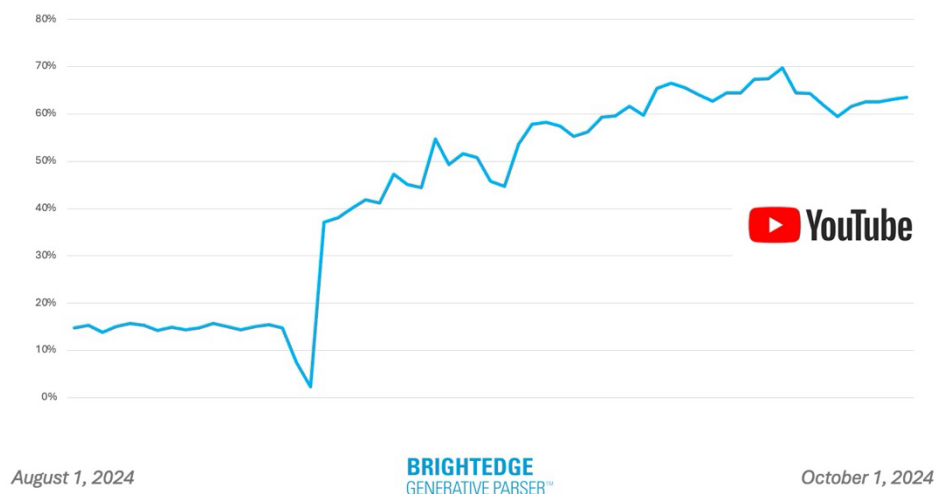
This growth in YouTube is significant for two reasons.

1. As a user-generated content platform, it provides businesses with an additional platform to leverage their community's voice or directly build content that could function as a citation. This means brands have an extra resource that could function as an AI Citation. This is particularly noteworthy since another UGC platform, Reddit, has experienced significant declines in AI Citations since May (today, it is rarely detected).

2. Sourcing YouTube is a clear demonstration of Google Gemini's (the AI powering AIOs) multi-modal capabilities. Videos have been part of search results for years, but in these instances, text such as descriptions or transcripts, if available, are used to rank the video. Now, with Gemini, we're seeing that actual content in the video can be cited to help

generate an answer to a query. This means that details in the video product review that may not be available via text can be used to create an answer.

In the examples below, the content cited is spoken in the video instead of printed in the descriptions.
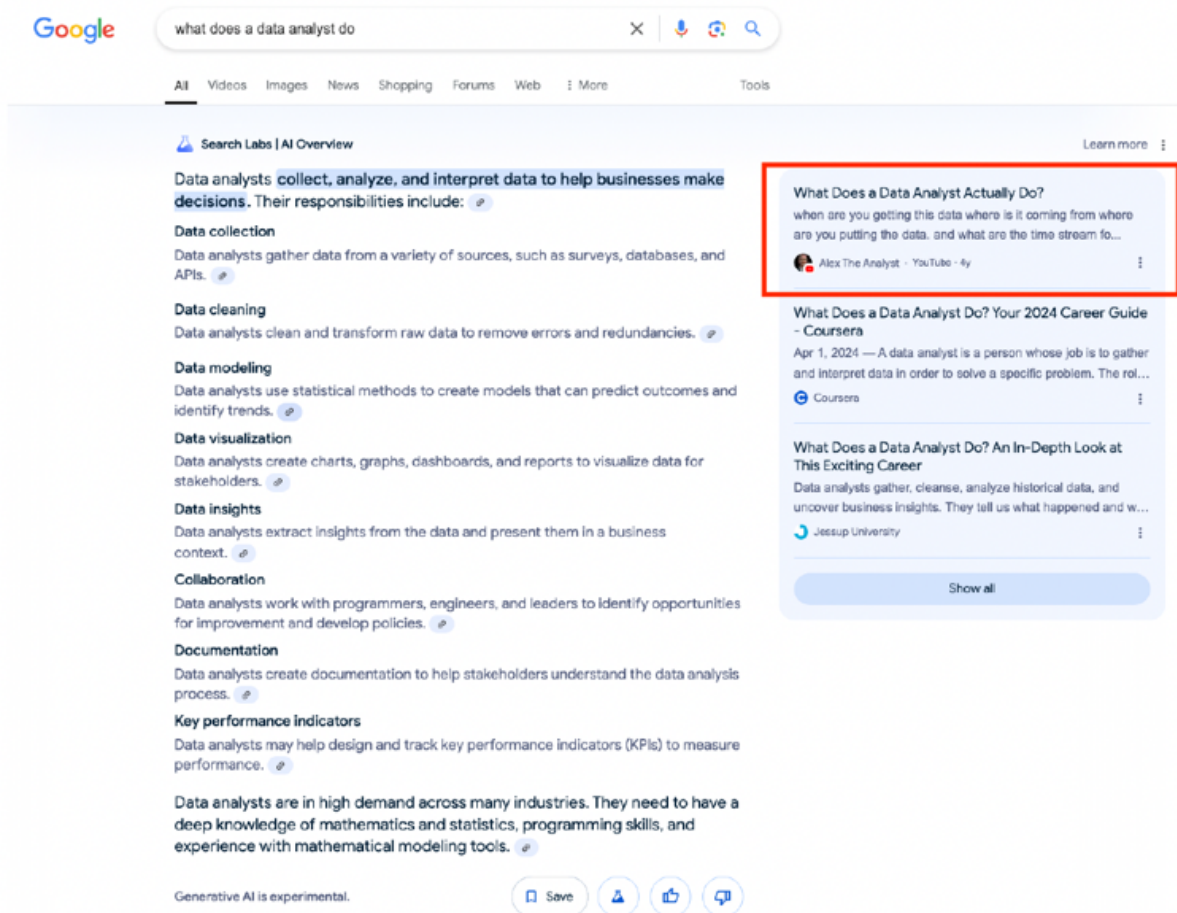
Below: E-commerce AIO with YouTube Cited as a source, including content sourced from within the video.

For brands, this means that, more than ever, video needs to be part of a comprehensive SEO strategy.

Not only is YouTube already the second largest search engine, but its content was cited as a source at least once in as much as 60% of the AIOs tracked by BrightEdge Generative Parser™ in September.

This represents a significant opportunity for brands to orient their video strategies around the areas where AIOs are present in their space to influence how AIOs are generated and provide an additional referral source.

- YouTube citations for all queries increased by 310% between August and September.
- Video is becoming a dominant medium in AI-generated results. While e-commerce hasn't fully caught up, the rise in video content overall suggests that brands should prioritize optimizing video assets for YouTube to capitalize on this trend.

2: Shopping Queries that Show AIOs Are Gradually Stabilizing

Volatility in shopping queries decreased from 37% (early August) to 26% (late September), indicating a more predictable environment

As the holiday shopping season approaches, one of the most striking trends is the stabilizing nature of shopping-related queries with AIOs. BrightEdge Generative Parser™ tracks the coefficient of variation (CV) across all data points. This is a statistical measurement that describes the variability of the data point over time.

AIO Presence in Shopping is Stabilizing

Shopping Query Volatlity Score

August 1, 2024   **BRIGHTEDGE** GENERATIVE PARSER™   October 1, 2024
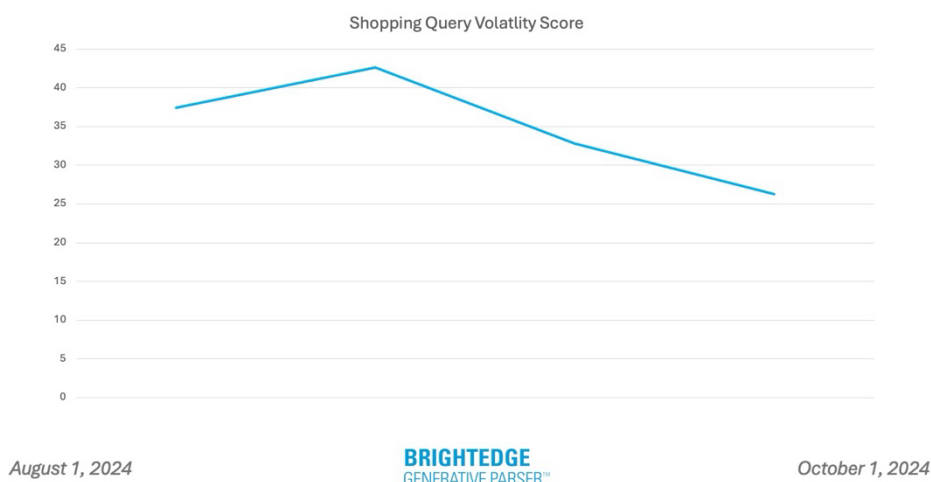
In other words, since we're tracking data daily, we can see how much the data varies. If a CV is high, it indicates that there was higher variability in the data during that time period.

With this in mind, we observed that the CV for shopping queries with AIOs dropped from 37% in early August to just 26% by the end of September.

For marketers who are planning, this is encouraging because as the presence of AIOs becomes less volatile, there's less chance conditions will change. For example, today, an AIO appears for the query "46-inch outdoor smart TV". The lower volatility scores for such queries suggest a greater likelihood that this query will consistently show an AIO.
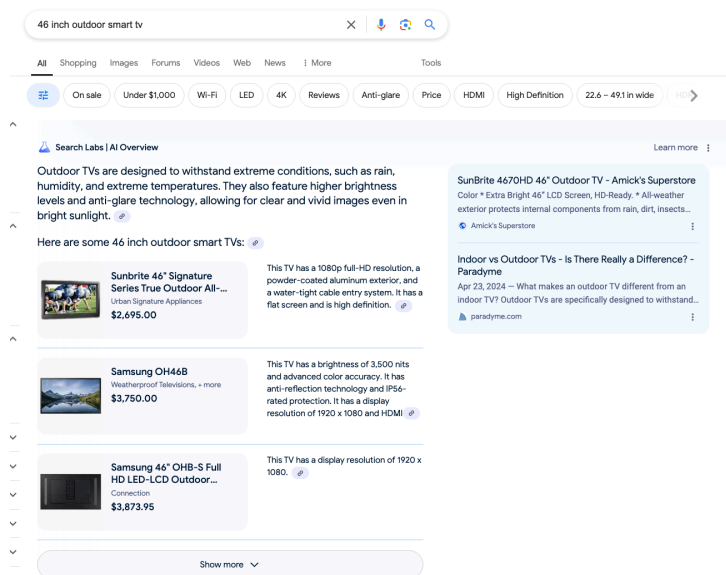
If a brand implements structured data to address the questions related to the needs of an outdoor TV, it will not only have a chance of being cited by this AIO for the answer, and there is less of a chance of that AIO going away for that query.

Marketers can be more confident these traits today will be consistent by Cyber Monday or Black Friday.

- Volatility in shopping queries decreased from 37% (early August) to 26% (late September), indicating a more predictable environment
- This suggests that Google's AIO algorithms are stabilizing, providing marketers with a more consistent landscape for optimization. Expect fewer fluctuations in AIO appearances as we get closer to Black Friday and Cyber Monday.

3: Collapsed Content Features on the Rise for Shopping Terms

Google leans into more compact and user-friendly presentations for dense product information.

Our data at BrightEdge reveals a series of significant adjustments between July and August, which is particularly relevant for marketers optimizing content related to products.

A growing trend in AIOs is the use of collapsed unordered lists, which saw a sharp rise of 14.6 percentage points between mid-August and the end of September, indicating a shift toward more concise, expandable content formats. This format refers to lists that require the user to click on them to expand but provides visuals and guidance on what to consider when buying products.
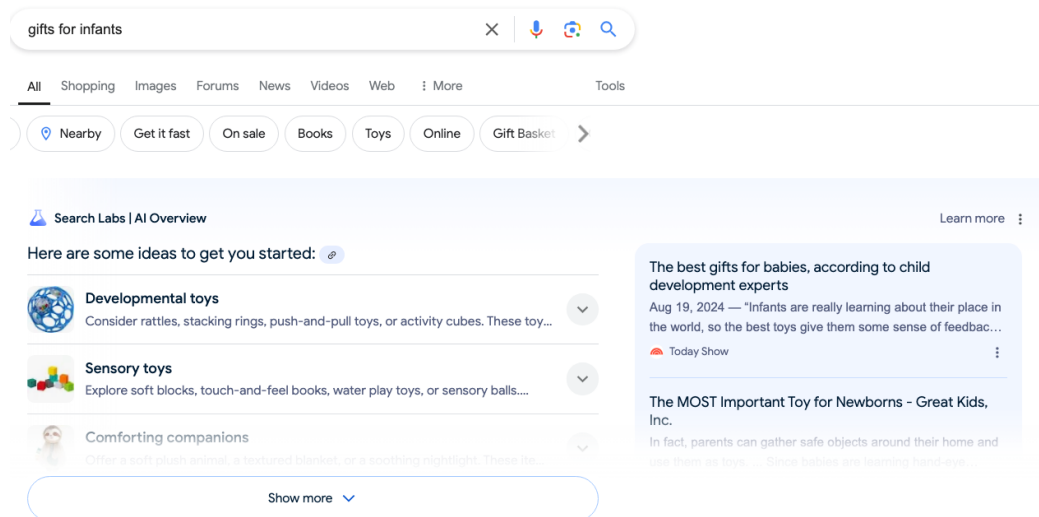
- Unordered Collapsed lists for shopping queries grew from 1.3% (August 16) to 15.9% (September 30).
- Google seems to be leaning toward more compact, user-friendly presentations for dense product information. This could benefit shoppers during Black Friday, where quick, expandable comparisons are crucial to decision-making.

4: Larger AI Overview Panels for E-commerce

The average height of e-commerce AIOs grew by over 40% from August to September

Despite the drop in overall presence, e-commerce AIOs that do appear are getting larger. The average height of e-commerce AIOs grew by over 40% from August to September, signalling that Google is allocating more space for product details and comparisons when an AIO is warranted.

- E-commerce AIO height increased from 651 pixels (August) to 914 pixels (September).
- This trend highlights the need for more detailed product content as users approach high-intent shopping periods like Black Friday. More visual content, especially product carousels, and comparisons, will likely play a critical role.

E-commerce AIO height increase   40%
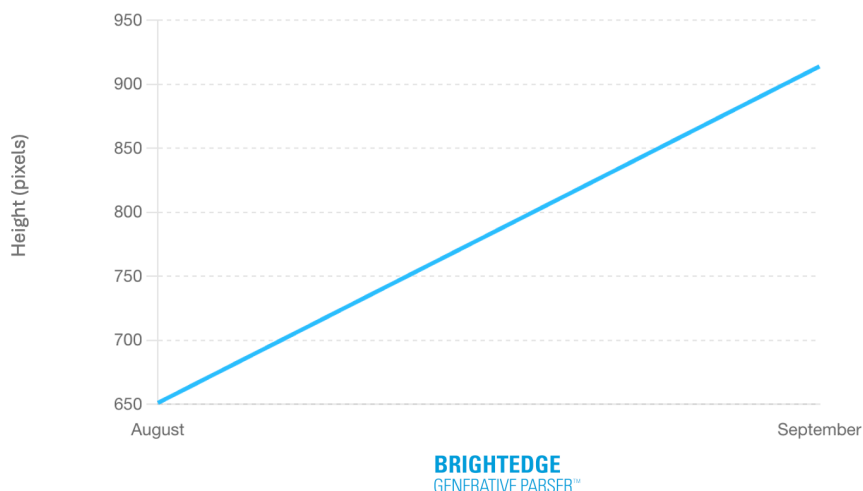
Height (pixels) — axis: 950, 900, 850, 800, 750, 700, 650 — August to September

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5: AIO Presence in E-commerce Queries Drops

Google is balancing AIO and traditional organic search e-commerce content

E-commerce AIO appearances dropped by 36.6% between August and September. This is a significant decrease, indicating that Google is pulling back on AIOs for e-commerce queries in favor of more traditional search results, likely due to the high stakes of holiday shopping decisions. As mentioned last month, we observed a parallel trend where product grids have grown significantly for E-commerce queries.

- E-commerce AIOs decreased from 12.04% (August 1) to 7.63% (September 30)
- While AIOs remain a crucial part of the user journey for informational queries, e-commerce content may rely more heavily on traditional organic search in the upcoming months.

For e-commerce marketers, this signals the importance of also focusing on traditional SEO optimization as holiday shopping ramps up.

Areas where we've seen fewer AIOs for shopping queries in the past month.

- Queries for Specific Products: -7.2%
- Furniture and Home Décor: -2.7%
- Clothing and Fashion: - 2.2%
- Searches for 'best': - 1.7%
- How-to and Instructional Shopping Searches: -1.6%

6: Rank Overlap between Organic and AIO Citations Dropped Significantly for Shopping Keywords

High-ranking content is increasingly likely to be featured in AI Overviews

In September, a notable shift occurred in the relationship between AI Overviews (AIOs) and traditional search rankings, particularly within the top 10 results. This change illustrates a broader adaptation by Google to align AIO content with the highest-ranking search results more closely. However, we saw the opposite trend when we isolated the e-commerce-oriented keywords. Suggesting Google is looking for more ancillary content and things that may answer additional queries that aren't directly related to the initial search.

- The percentage of overall keywords ranked in the top 10 increased from 21.6% in July to 24.5% in September. However, for e-commerce keywords, there was a decline, with the top 10 percent decreasing from 12.4% in July to 7.0% in September.

This trend highlights a divergence in content strategy between general and e-commerce searches. For general queries, the increased integration with top-ranking results underscores the importance of optimizing content to appear not just anywhere but among the top results.

- It suggests that high-ranking content is increasingly likely to be featured in AI Overviews, reinforcing the need for robust SEO practices.

7: Product Comparisons Maintain Importance

Stability shows that Google continues to value product comparisons

Comparison-based content, particularly in the form of pros and cons, remains an integral part of AI Overviews. While these features saw only a slight increase (1.3% to 1.6%) from August to the end of September, their stability shows that Google continues to value product comparisons.

Comparison features like the comparison tables grew marginally from 1.3% (August 1) to 1.6% (October 5).

Clear and concise product comparisons will remain vital as we near Black Friday. Marketers should ensure their content includes easy-to-read comparisons that can be pulled into AIOs to influence shopper decisions.

**Key Takeaways for Marketers and the Holiday Shopping Season**

1. Leverage Stabilization: With shopping queries becoming more stable, now is the time to fine-tune your content for long-term results. Expect more consistent AIO appearances leading up to the holidays. Tracking the presence of AI overviews is vital so that marketers are prepared for AIOs during the holiday season.

2. Optimize for Visual Richness: With e-commerce AIOs getting larger, especially for product details and comparisons, ensure your visual content (e.g., product images, videos, comparison charts) is ready to stand out.

3. Don't Rely Solely on AIOs for E-commerce: Traditional search is still crucial. With fewer e-commerce AIOs, ensure your pages are well-optimized for traditional rankings. Pinpoint precisely where AIOs will be present this year.

4. Prepare for a Video-First Environment: The explosion of YouTube citations means video content is more important than ever. The AI powering AI Overviews, Gemini, is multi-modal, meaning it can generate content regardless of whether it is sourced from a video or text. We're seeing the effect of this with the explosion of YouTube citations. Focus on creating engaging, AIO-friendly video content for product demos, reviews, and comparisons.

AI Overviews are evolving rapidly as we approach the holiday season. Marketers should closely monitor these trends to ensure they're prepared for the shifts coming during Black Friday and Cyber Monday.

## Staying Ahead of AI Overviews Directly in the BrightEdge Platform

Since September, marketers have seen 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.

AIO Presence | Citations Presence |Rank Changes
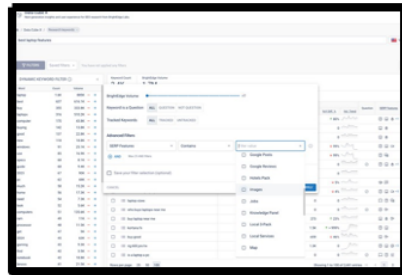
Pre-Planning

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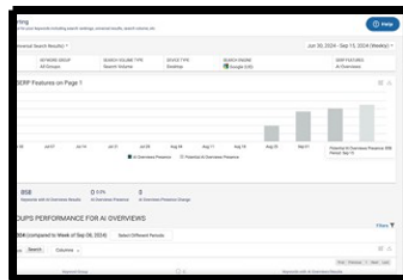
During a Campaign

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