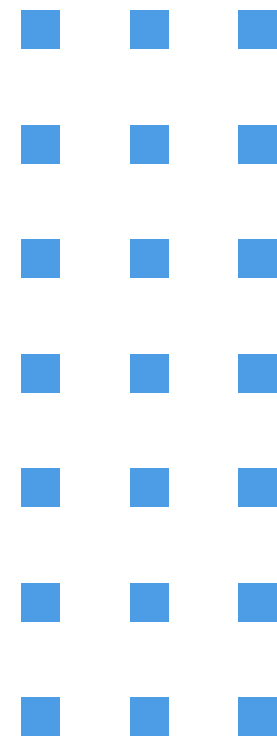
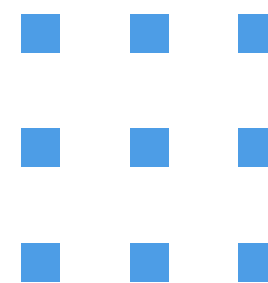


AI Overviews Got 65% Bigger This Holiday Season



Black Friday vs. Cyber Monday: What
Changed from 2024 to 2025

BRIGHTEDGE



Two Holidays. Two Strategies.

Black Friday



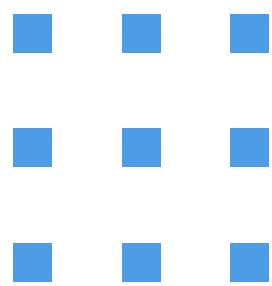
106% YOY increase in
keywords triggering
AIO's

Cyber Monday



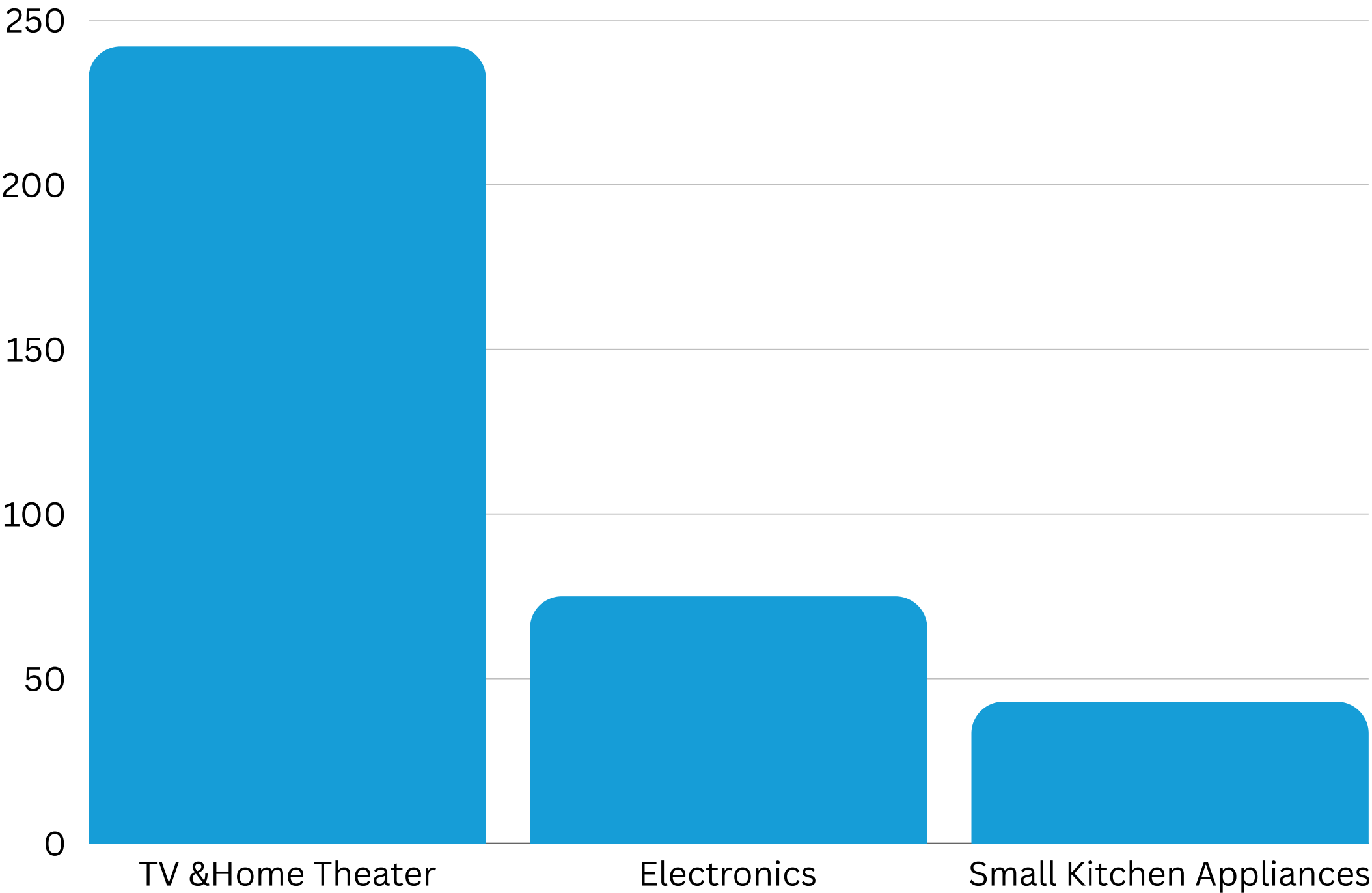
37% YOY increase in
keywords triggering
AIO's

Google expanded 3x more for research
than for purchase.

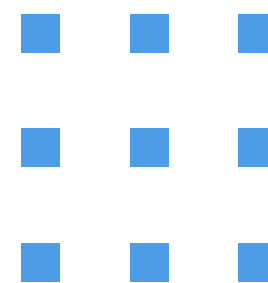


Where Google Expanded AIOs Most during the holiday weekend in 2025

Percentage Lift YOY in AIO Coverage



Research queries in gift categories saw the biggest AIO expansion. Think: 'best smart tv,' 'ninja vs vitamix,' 'top chromebooks.'



What Google Just Showed Us



Google Isn't Stepping Aside: The theory that Google would pull back AIOs during peak shopping? The data says the opposite. Expect even more AIO coverage as Google learns what works.



Intent Determines the SERP: Research queries (Black Friday mindset) get heavy AIO treatment. Purchase queries (Cyber Monday mindset) stay traditional. Match your strategy to the intent.

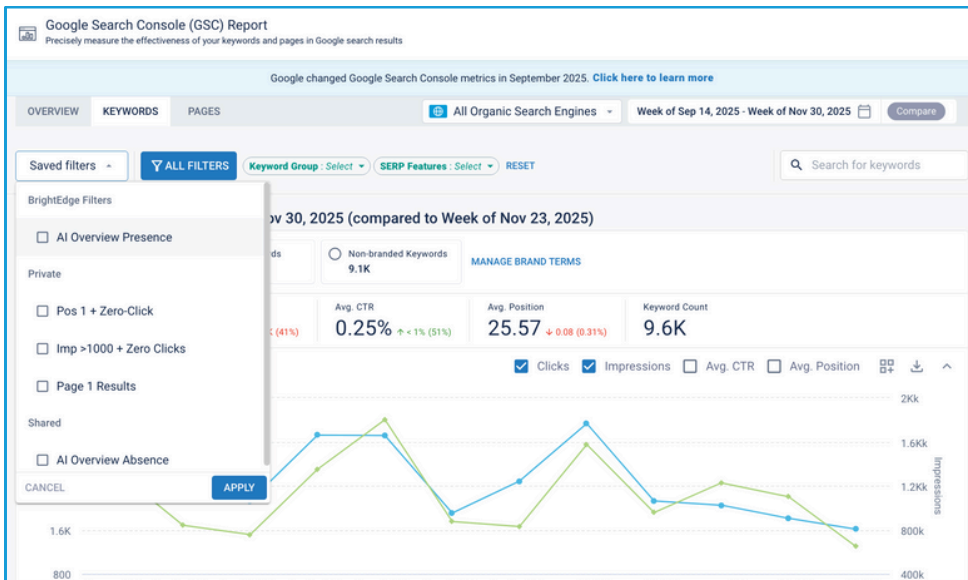


Start Optimizing Earlier: Google ramped up AIO size 14% in the 4 weeks before Black Friday. Content that earns citations early establishes position before the real estate gets crowded.

BRIGHTEDGE

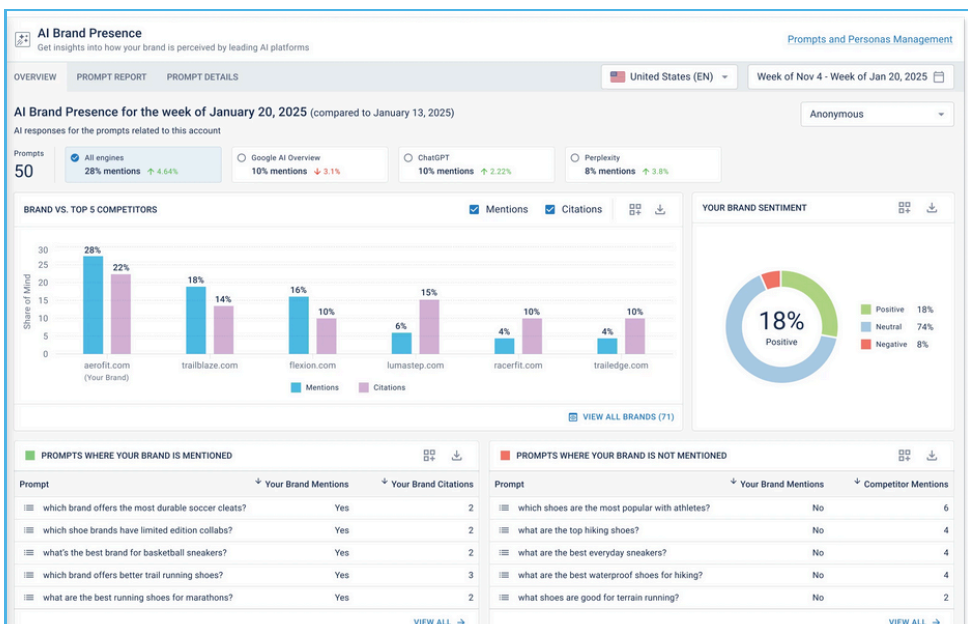
BrightEdge is your one stop shop for AI and Classic Search Optimization!

GSC Reporting Connects AIO to Classic Search



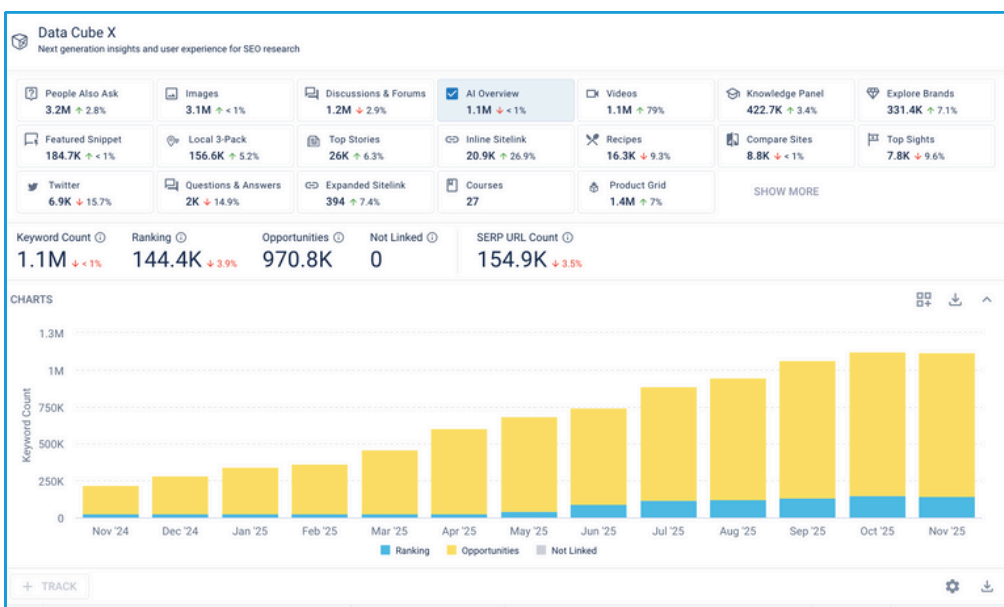
Filter your keyword traffic by identifying those with an AIO to quickly analyze their effect on click-through rates and to uncover patterns in how Google is assisting your customers with shopping throughout various seasons.

Track your visibility across AIO's over time



AI Catalyst simplifies the process of tracking your presence as holidays and significant events approach. You can easily view where you are mentioned and how it compares to your competitors, all in a single glance.

See the changing landscape of AIO's in your marketplace



Data Cube X helps track AIO growth in your industry and assess the impact of seasonal events on market visibility. It enables quick adaptation to changes in how AI affects customer discovery journeys.