Focus:
This paper analyses Universal Search Integrations in Google US search results, in particular their distribution, number and development. To provide a large sample set, data used was collected throughout 2014.

Universal Search, also known as “Blended Search”, denotes the integration of on-screen media in addition to organic search results. In particular, this study focuses on Videos, Images, Maps, Shopping (Product Listing Ads), and News results. Searchmetrics has been conducting specific analyses of Universal Search since 2009.
Infographic: Universal Search 2015 - US

Universal Search
Focus on Google products

Frequency of Universal Search Integrations

- 35% Images
- 6% News
- 44% Shopping
- 14% Videos

Google Shopping: Growth of Integrations

- 2012: 3%
- 2013: 119%
- 2014: 182%

Video Integrations: YouTube’s share

- 2012: 80%
- 2013: 54%
- 2014: 82%

Keywords with Universal Search Integration

- 79% of all keywords have at least one Universal Search Integration

The Searchmetrics Universal Search Index is based on daily global data crawling the Google.com site for billions of keywords/keyphrases from January to December 2014.

Fig 1. Searchmetrics Infographic - Universal Search 2015 Google.com
Abstract

Main results at a glance

**Universal Search** is the collective term for all media and snippets displayed in addition to the Google organic SERPs results. The most important of these are Videos, Images, Shopping, Maps, and News. Some of the interesting findings are:

1. Nearly 80% of all search results show at least 1 integration by the end of 2014.

2. The most important integrations in December 2014 were:
   a. Video (55%),
   b. Images (40%),
   c. Shopping (PLAs) (16%),
   d. News (13%)
   e. Maps (7%*).

   * Results reporting at least 1 integration

3. In 2014, Shopping ads were the clear winner in Universal Search. The keyword share for PLA integrations more than doubled over the year, from 7.5% of all integrations in January 2014 to 16% by December 2014.

4. YouTube dominates Universal Search for video, with 8 out of 10 videos in search results coming from the Google subsidiary. At the same time, many competitors have lost market share in search result integration, especially Helpster, Muzu and Metacafe.

5. Google is integrating its own products more and more into Universal Search. In addition to an increase in embedding direct PLA Shopping ads, Map integrations and the dominance of YouTube Video integrations were evident in 2014.

For further information, and a definition of the analysis, the database used and other influencing factors, please refer to the following page:

[www.searchmetrics.com/what-is-universal-search](http://www.searchmetrics.com/what-is-universal-search)
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Searchmetrics has been studying Universal Search elements on Google.com for more than 7 years. In analyzing the data for our 2013 study, we noticed few major changes compared with previous years. However, 2014 was very different, especially if we consider the development of keyword ratios for their respective integrations.

The distribution and frequency of Universal Search results can be analyzed using different approaches. In this chapter, the market share is to be focused on, which refers to the share of keywords that are enhanced by at least one Universal Search integration. In the second chapter, the absolute occurrence of the single elements in question are analyzed.

Universal Search: Distribution by keyword share

The calculation of keyword integration ratio is based on how many keywords / search results have integrations (or not).

- **Proportion of keyword integration for all keywords investigated**

Although there are search results with no Universal Search integrations, the number of results with integrations is above 100%. This can be explained by the fact that for each keyword there are often a number of integrations displayed simultaneously. For example, News, Videos and Images are included in the Knowledge Graph for the search term „Homer Simpson."

![Screenshot 1: Google search result page for keyword „Homer Simpson” (edited)]
The proportion of keywords with Video decreases, Shopping and Map integrations rise - Images and News stay relatively stable

The distribution of keywords and their respective integrations on Google.com can be shown in the graph below - the ‘market distribution’ of individual integrations, i.e. the percentage of keywords with at least one Video, Image etc:

![Graph showing the proportion of keywords with integrations](image)

**Figure 2: Proportion of keywords with integrations in % (total ≠ 100%)**

Video integrations for keywords stood at 66% in January 2014, rising slightly towards the middle of the year and falling by approximately eleven percentage points to finish at just under 55% by December. Despite this downward trend, Video integrations in Universal Search are still widely used. In comparison to all Universal Search elements, keywords with at least one Video integration are common.

The proportion of Image integrations, which rose slightly in 2013, remained virtually unchanged in 2014. Images started in January and ended in December at around 40%, with slight variations throughout the year. Google has made very few changes in the proportion of keywords with at least one Image integration. It has also become clear that Image integrations do not appear when there is a Knowledge Graph present. This is especially true for keywords for entities.

The proportion of keywords with a Map integration has risen, with only 2% of search terms returning a Map integration in January 2014, rising to over 7% by December 2014 – a three-fold increase. By contrast, the number of individual Map integrations by keyword has decreased, i.e. the number of maps returned per keyword/search term is much lower.

The proportion of keywords with News integration remains consistent at around 15%, decreasing in December to just below 13%.

In both our 2013 study and this one, Shopping integrations showed the most interesting changes. Google introduced its new Payment Model, and the number of keywords with a Shopping integration changed frequently throughout 2014. Particularly striking was the dip in the Summer, book-ended by increases at the beginning and end of the year. Effectively, the percentage of keywords for Product Listing Ads more than doubled from 7% in January to 16% in December 2014.
2. Significant developments on the frequency of individual Universal Search integrations

At first, keyword ratios were central to our analysis, but now the frequency of the different types of integration will be analyzed.

**Shopping takes off - all other sectors decline**

It is rare that a search result delivers only one News or Image integration – most return several integrations. The following calculation is based on the sum of all individual Image, Video, News, PLA and Map integrations (= 100%), and from this, the individual ratio of each integration can be calculated:

- **The ratio of elements for a given integration can be worked out by looking at the total sum of all elements of all the integrations.**

Below is an overview of the evolution of the total number of individual Image, Video, Shopping, Map and News integrations in all investigated SERPs in relation to their respective shares of the total (100%).

By using this approach, more movement can be seen. Pictures and Videos are continuing their downward trend from last year and, for the first time ever, Image integrations lost their top spot by frequency. Integration frequency revolves around Shopping, with the fluctuations in mid-year underlining this point. The analysis and results are covered in detail below:

**Universal Search: Absolute number of integrations**

Universal Search integrations with images were at 40% in January 2014, falling in February and then rising briefly over the Summer (due to the development of Shopping integrations by Google), before finally falling to 35% in December. The absolute number of images displayed in SERPs has not changed very much, however. Google seems to have found a relative constant. More images can be found in organic search results, as well as in the Knowledge Graph to the right of the SERPs.
As in the previous year, although the proportion of keywords with at least one Video integration is highest, the absolute number of videos continues to decline. This may be surprising, given the boom in video content, however, it can be explained given that most of video sharing and consuming takes place in social networks. In the course of this study, however, we found that the decrease of the absolute number of videos in Universal Search results has a lot to do with the loss of visibility of individual video portals, keeping the most important player unaffected.

The most prominent curve belongs to Shopping. From January to February 2014, the share of PLA’s for Universal Shopping elements grew dramatically - from 23% to 38% - then remained constant until May 2014 before a clear mid-year drop which was accompanied by an increase in the proportion of other integrations – particularly Video and Images. Changes in the absolute numbers for other elements were affected by the major mover here – the stark and evident decline in Shopping elements over the Summer that proportionally affected all other integrations.

The number of News and Map integrations, a small proportion of the overall number of integrations, remained stable over the course of the year. The trend here reveals a slight decline in Map integrations, and a slight increase in News integrations.

These trends are confirmed by a detailed analysis with a focus on the percentage growth rates of individual integrations.
3. Percentage developments in Universal Search integrations in detail

Evolution: Shopping leaves everything else in its wake

The graph below shows the percentage development of the absolute number of respective integrations. The output value in January 2014 for this set was 100%.

Here, the extent of the development of Shopping integrations is clearly seen. All other trends, in comparison to the growth of the PLA impressions, are slight. Developments in this area are included in the detailed analysis. The absolute number of images within Universal Search remains almost unchanged, after a slight increase at the beginning of the year. This is also true for News integrations that remain virtually unchanged both absolutely and relatively.

It is clear from the previous diagram that the negative development of Video integration took place most notably from July to September 2014. Within this period, the absolute number of different videos almost halved (-42%). The reason for this, as mentioned previously, lies in the development of several individual video portals (discussed in the next chapter).

The fact that Google has skewed results in favor of local search in 2014 can be seen in the development of Map integration. First, the number of map results increased by 30 percent from April to May in Universal Search, but declined during August, and ended December 2014 at a value of -34% compared to the beginning of the year.

Again, the exception to this is Shopping. The relative growth of all individual PLAs is concrete, with a strong rise evident from January to February (+ 120%), and a mid-year decline, followed again by a renewed strong and positive rise in October peaking at + 126% and ending in December at a value of + 118%. The sharp decline in Summer could well be due to the weak selling season, but there could also be other reasons. What is surprising is the severity of this dip. Interestingly, this coincides with an increase for AdWords.
Google Shopping is growing and growing

As a reminder, not only has the overall share of Shopping integrations increased, but also the proportion of Shopping integrations has increased significantly.

The graph below shows a detailed view of the relative growth of Google Shopping over the two years since its introduction:

Note: The current Google Shopping payment model came out of Beta at the middle to end of February 2013 globally, and has been available for all online marketers since then. Therefore, the graphic does not show shopping data for January and February 2013.

In 2012, Shopping integrations were still included in the annual Universal Search analysis - with all market participants, except Google, losing ground, and with a strongly rising trend. Such a comparison is no longer possible. Since the changeover to the payment model with Product Listing Ads (PLA) in 2013, no other market participants exist, with everything happening in Google’s own product, „Google Shopping“.

As can be seen in the previous graphs, both the proportion of keywords with Shopping integration and the number of individual integrations has grown. In Figure 5, this is particularly evident from the relative growth. Since its introduction in early 2013, this element has increased ten-fold.
4. Video Integrations: YouTube dominates the market

The proportion of YouTube videos has increased rapidly to about 80%.

Looking at the last 3 years of Video integration overall, some jostling for position by market participants is noticeable, however YouTube’s dominant position has never been seriously called into question.

Acquired in late 2006 by Google’s, YouTube has been the market leader for Video integrations in Universal Search since 2012. Other vendors lost market share in 2012, with YouTube achieving an average market share of around 80 percent.

The story in 2013 is somewhat different. The proportion of YouTube videos to all video dropped over the course of the year from almost 80% in January by about 25 percentage points. In December 2013 ‘only’ every second video in Universal Search was from YouTube.

Here is the market distribution development for 2014:

![Figure 6: Video integrations - market distribution by contributor (%)](image)

Initially, a small drop in YouTube market share to just over 30% in February is evident, but this steadies in the following month and remains stable until mid-year. From August, the line rises rapidly to about 75% and climbs towards the year-end. In December 2014, eight out of ten videos in universal search are from YouTube.

The question arises as to whether the volume of YouTube videos in Universal Search has increased, or if the volume of competitor’s media has fallen - or both. First, let’s look at the log view of the same values, in which the performance of the other providers becomes clear.
YouTube competitors

In this logarithmic representation of the 6 largest competitors in the YouTube video sector, the market development can be seen more clearly. None of the other competitors have ever accounted for more than 10% of the market, and except for Dailymotion and Vimeo, every other video provider ended 2014 with negative growth.

Helpster, Muzu and Metacafe were particularly impacted by declines in June and August, and again at the end of the year. For all of these providers, the absolute number of videos in search results during these periods decreased dramatically.

In effect, the increase in the proportion of YouTube videos was not due to an increase in the absolute number of videos in SERPs, but the decrease in the number of videos from other suppliers. The sum of all YouTube videos in Universal Search is stable throughout the year – with the only exception being the drop in February.
5. News integrations: Number of news sources continues to drop

In 2012, the growth in distribution of News integrations was still apparent. There were more and more keywords for which News Integrations were displayed, and the number of news items per integration increased.

With this knowledge, it became important to know whether Google was showing more news items from the same news providers, or if the number of news providers had grown. It seems that both were true – the total number of news items increased, and the number of news sources also increased.

This trend continued into 2013, but then changed at about the same time as the Hummingbird release, resulting in a reduction in news providers in Universal Search.

![Figure 8: Number of different news sources - development in %](image)

In 2014, the trend continued, albeit not so drastically. For the first 9 months of the year, the number of different news sources remained constant, rising in October and falling after that to the end of the year. By December 2014 there was a reduction of roughly 17% of news sources compared to January of the same year.
Summary: Universal Search 2015

Most important Universal Search developments throughout 2014: On average, four out of five keyword search results returned a Universal Search integration. This has remained constant.

For Universal Search 2014, there is one clear winner – Google itself. In addition to the growth of YouTube video results, Google Shopping results (Product Listing Ads) increased strongly.

Videos remain the most common integrations in Universal Search, even though they are declining. As of January 2014, 66% of all keywords returned at least one Video integration, but this fell to 55% in December 2014. In the video sector, the proportion of Video integrations for the Google subsidiary YouTube rose to 80%, compared to the sharp decline suffered by its competitors Helpster, Muzu and Metacafe.

Images are the second most common integration, consistently appearing in 40% of search results analyzed in 2014. Map integrations began 2014 at 2.4%, climbing to 7.1% by December 2014. News integrations declined from 15.1% to 12.7% over the course of the year.

In short, Google’s products appeared more frequently in Universal Search in 2014. The 2014 increase in Shopping Ads (PLA’s), embedded Maps and YouTube videos – all Google products – is significant.
About Searchmetrics

Searchmetrics is the pioneer and leading global enterprise platform for search experience optimization. Search Experience Optimization combines SEO, content, social media, PR and analysis to create the foundation for developing and executing an organic search strategy. It places the spotlight on the customer, contributing to a superior and memorable purchase experience.

Enterprises and agencies use the Searchmetrics Suite to plan, execute, measure and report on their digital marketing strategies. Supported by a continually updated global database, Searchmetrics answers the key questions asked by SEO professionals and digital marketers. It delivers a wealth of forecasts, analytic insights and recommendations that boost visibility and engagement, and increase online revenue. Many respected brands, such as T-Mobile, eBay, Siemens and Symantec, rely on the Searchmetrics Suite.


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