The State of the SERP 2018

WHERE THINGS STAND WITH THE GOOGLE SERP AND THE FEATURES IT CONTAINS - SETTING UP THE 2019 YEAR ON THE SERP.

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Introduction

Like the State of the Union Address delivered by the American President each year, the State of the SERP is an examination and exploration of the SERP's condition and circumstance. It's a look at what trends are driving the SERP as propelled by the ever-changing way Google engages us with its SERP features.

Over the years, and over the course of 2018 in specific, Rank Ranger's data has been at the forefront of SERP feature discoveries, news, and research. However, instead of looking at the SERP in a piecemeal fashion, the State of the SERP is an opportunity to look at the condition of the results page and its features in a more encompassing and broad manner.

This is an analysis of how SERP features that have influenced the SERP. As such, we'll look at how SERP feature volatility has impacted the SERP, how a more energetic use of these features has created a new ranking environment, and how these elements are at times influenced by device, niche, and keyword.

Specifically, this paper will examine:

- Mobile vs. Desktop SERP feature trends
- SERP feature volatility in 2018
- SERP feature implementation dynamics
- Trends in SERP feature pairings
- Featured Snippet tendencies

SERP Feature Behavior: Mobile vs. Desktop

In 2017, mobile devices were responsible for 63% of all site traffic in the US. Of course, the difference between mobile and desktop web usage goes far deeper than the number of site visits produced by each device. The amount and very nature of the content users consume on mobile is drastically different than that on desktop. In fact, the very way users interact with each device is grossly different. It is for this reason that Google still makes use of pagination on the desktop SERP but employs a 'load more button' on mobile.

Quite logically then, the way Google implements its SERP feature strategy on mobile will diverge from that of the desktop SERP. However, and as odd as this sounds, 2018 has seen the two devices only become closer in their SERP feature trends in many cases. Moreover, while overall display levels vary, SERP features tend to trend the same way on mobile as they do on desktop.

Here's a closer look:

TRADITIONALLY UNIVERSAL SERP FEATURES

There are a set of SERP features that have traditionally shared a cross-device data trajectory. For these features, the reason for their SERP appearance is universally applicable irrespective of device. Moreover, there are indeed features where space is not a factor further equalizing their playing field seeing that SERP real estate is a self-evident commodity on mobile.

HTTPS

Site security is a top priority for sites whether the user is engaging with a page on desktop or on mobile. As a result, device is hardly a factor when looking at both the number of HTTPS sites on page one of the SERP as well as the percentage of page one SERPs with a minimum of at least HTTPS site.

Average Number of HTTPS Results (Page One)

2018 has seen the average number of HTTPS sites on page one of the SERP increase significantly across both devices:

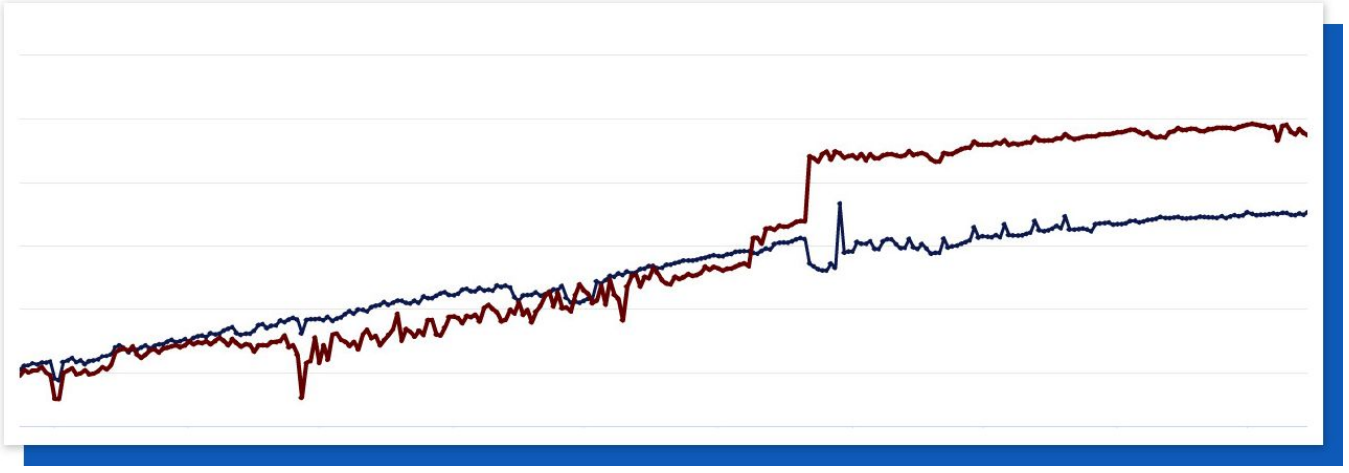
Average Number of HTTPS Results on Page One of the SERP

	Q1 Desktop: 6.7	Q4 Desktop: 8.2	22.3% Increase
	Q1 Mobile: 6.8	Q4 Mobile: 8.9	30.8% Increase

By the end of our data collection there was but a .7 point differential between mobile & desktop where the average number of HTTPS results is concerned.

However, when looking at the trends over the year, there was a clear divergence that occured circa the start of Q4:

HTTPS Results: Average Number on Page One



Desktop Mobile

Though the trends show a growing Q4 gap, when quantified there is but a .6 point difference between the device gap seen at the start of 2018.

Percent of Page One SERPs with HTTPS (Minimum One HTTPS Result)

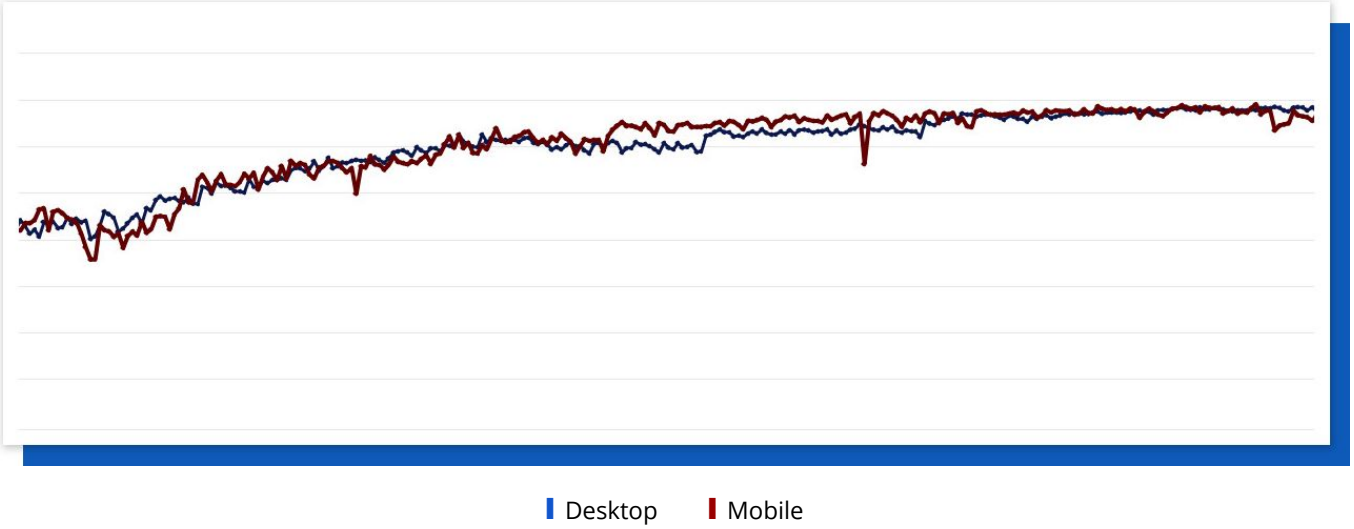
While the average number of HTTPS results was only *closely* related across both devices, the percentage of SERPs with at least one HTTPS result on page one was nearly identical on both mobile and desktop.

Moreover, while the average number of HTTPS sites on page one showed some nice growth, the percentage of pages that contained at least one HTTPS result remained stagnant, as there was simply no room for growth:

	Q1 **Desktop: 99.8**	**Q4** **Desktop: 99.8**
	Q1 **Mobile: 99.98**	**Q4** **Mobile: 99.8**

This data is more clearly shown when looking at the yearly trends for the percentage of page one SERPs containing at least one HTTPS result:

% of Page One SERPS with at Least One HTTPS Result



Reviews

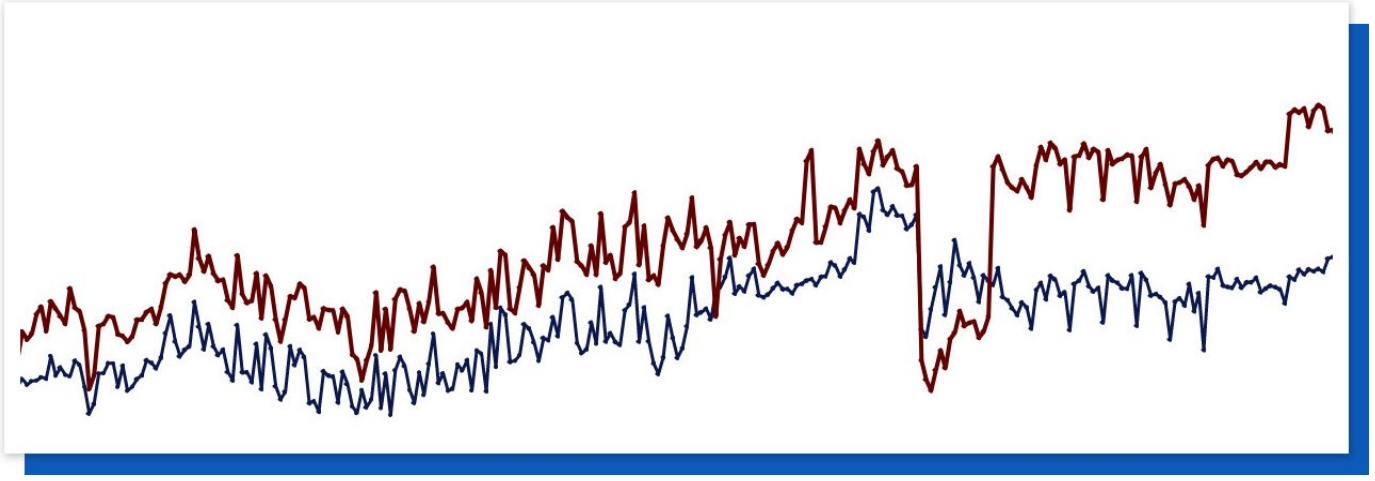
For pages that represent a product/service, a review/rating is equally helpful to both a desktop and mobile user. Furthermore, there is no concern over the amount of space reviews occupy on the SERP, further equalizing their mobile and desktop presence.

Consequently, there is not a large difference in the SERP presence of reviews across both devices.

Percentage of Page One SERPs Containing Reviews

Observing the yearly trends indicates that reviews have behaved similarly across both devices with what is all but the same data trajectory.

% of Page One SERPS with at Least One Review



However, and as seen with the data for the average number of HTTPS results on the SERP, there was a slightly larger gap between the devices during the year's last quarter.

	Q1 **Desktop: 39%**	**Q4** **Desktop: 40.6%**	**4.1%** **Growth**
	Q1 **Mobile: 39.5%**	**Q4** **Mobile: 43.1%**	**9.1%** **Growth**

The growing divergence between mobile and desktop reviews, when quantified, is indeed quite significant, despite just being a few percentage points.

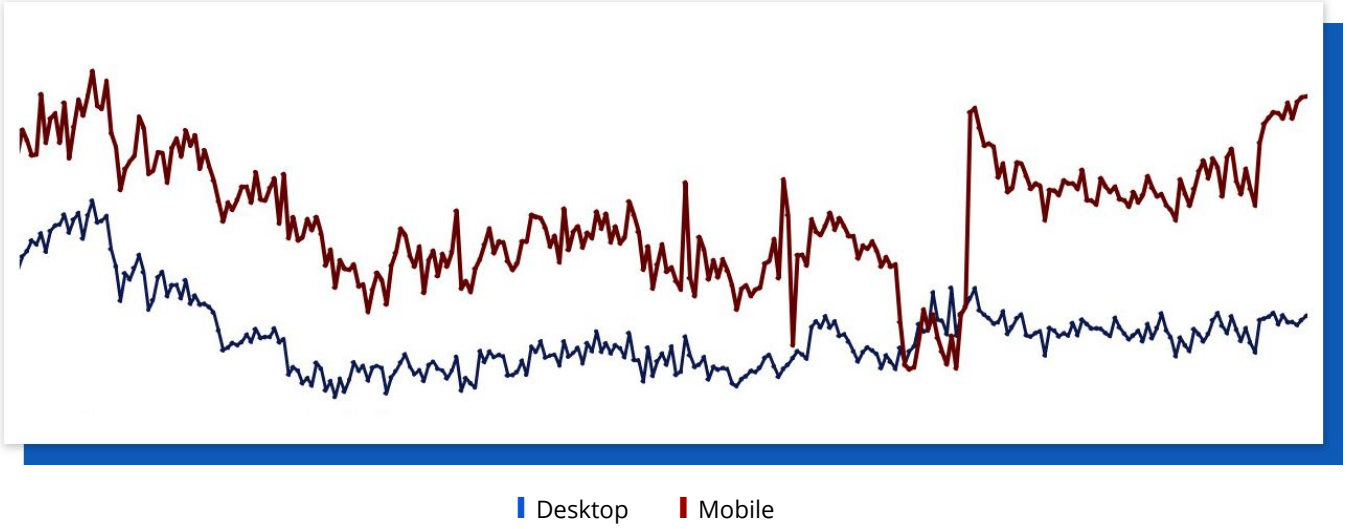
Differential Increase:
400%

Average Number of Page One Reviews Per Device

Where the average number of reviews is concerned the data across both devices is even closer.

Though the trends show an initially larger gap at the onset of 2018, that divide was narrowed as the year went on but only until Q4. Again, as 2018 moved closer to its end, Google widened the gap between the average number of reviews found on the mobile and desktop SERPs.

Average Number of Results with Reviews on Page One



Despite a wider gap between the mobile and desktop trends at both the start and end of 2018, there is still but a minimal point differential between the two.

End of Year Differential
.14 points

For the number of sites showing with reviews, device is less of a consideration for Google, at least as compared to it being a factor when deciding to place the SERP feature on the page altogether.

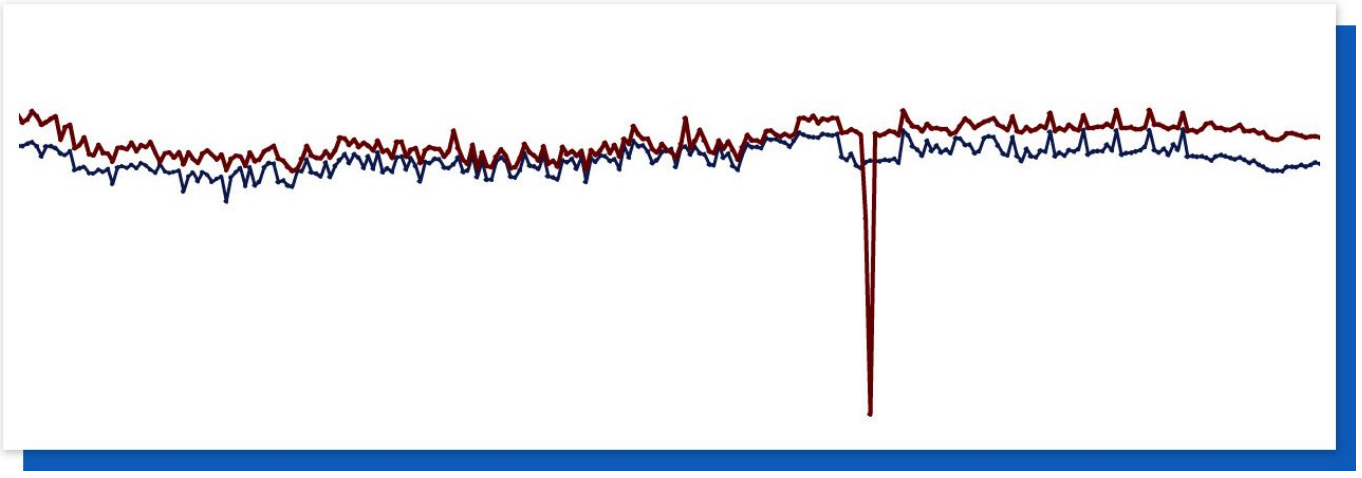
Related Searches

The Related Search feature is all but a search results staple, as it appears on up to 90% of all page one SERPs. As will soon be shown, Google seems to consider the feature a priority, despite the amount of space it consumes on the mobile SERP. This is most likely attributed to the feature's ability to not only help refine but also guide a user's search journey.

The Percentage of Page One SERPs Containing Related Searches

Across both devices, the Related Search feature has consistently maintained a page one presence between 80% - 93%. According to the data trends spanning 2018, there was very little variation between the page element's performance on both mobile and desktop.

% of Page One SERPS with Related Searches



That said, as the data trends indicate, a bit a of a larger gap developed during Q4 of 2018. However, despite this, the end of year data showed a close parallel across both devices.

The appearance of Related Searches on both the mobile and desktop SERPs, despite a period of some limited divergence, has all but remained constant as the differential between the devices at the start and end of 2018 is all but equivalent.

UNEXPECTED SERP FEATURE EQUIVALENCY

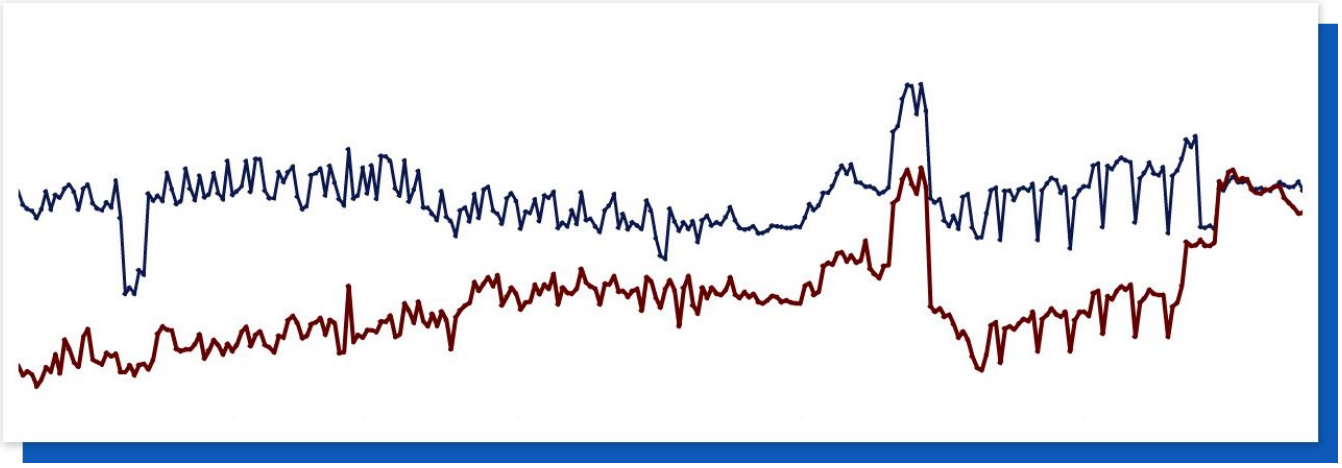
Just as there are SERP features that expectantly travel along similar data paths no matter the device, there are features where the convention would dictate different data trajectories.

Local Packs would be the prime example of this notion. Mobile has become the home for "near me" queries. Such searches on mobile have grown upwards of 500%, depending on the vertical, since 2015. However, despite this data, and as will soon be shown, such is not the case as the mobile Local Pack does not significantly outperform its desktop counterpart.

Local Packs - Mobile Comes Closer to Desktop

The Local Pack trends tracked throughout 2018 show a significant gap between its mobile and desktop trends:

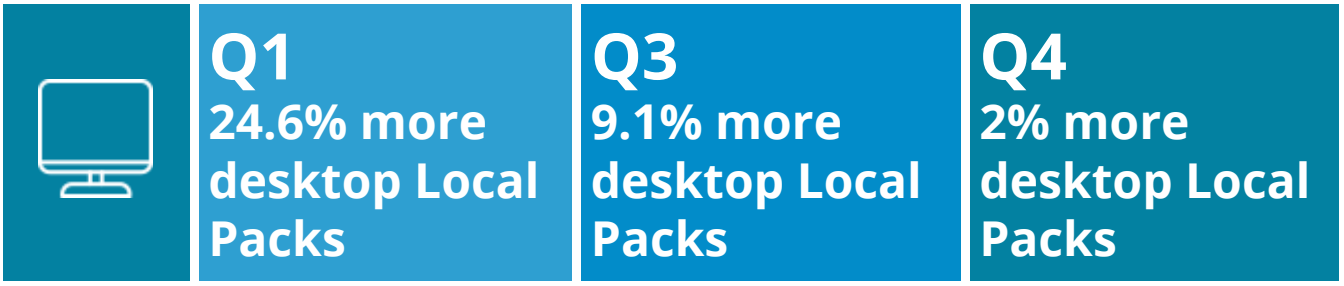
% of Page One SERPS with a Local Pack



Most interesting is not the gap shown between devices, but that there were significantly more desktop Local Packs being shown at the start of the year. However, and as can be seen above, that gap narrows during Q2 and part of Q3 before widening for most of Q4. Interestingly, towards the

end of the year, Local Pack levels per device became significantly similar before a last moment mobile drop-off.

Local Pack Differentiation by Device

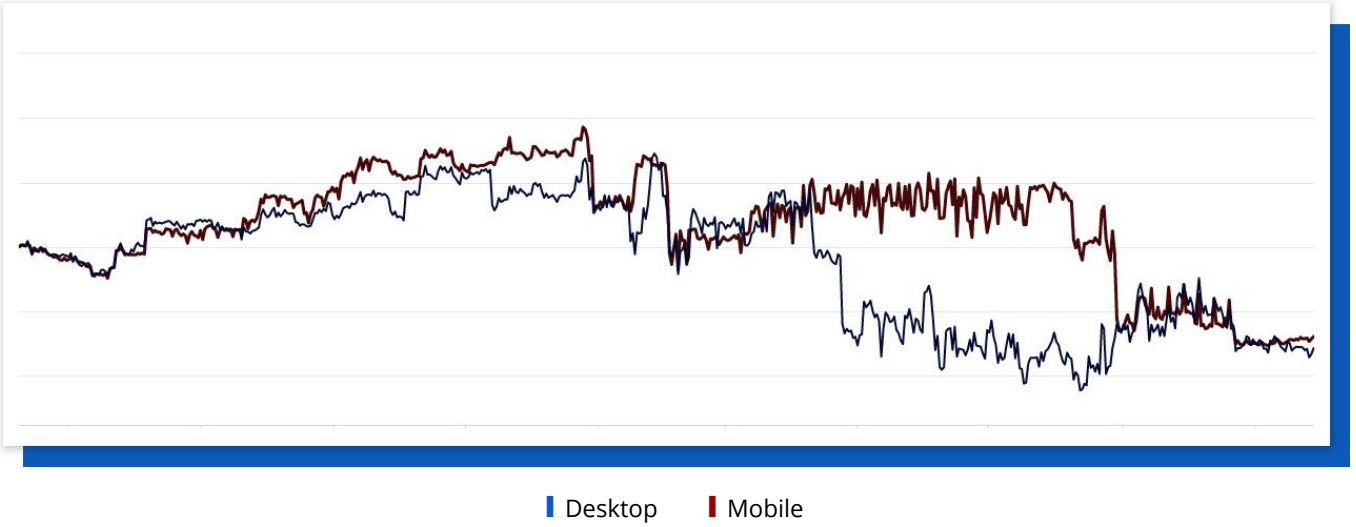


Despite some deep variation, there appears to be a trend towards moving the mobile Local Pack closer to the levels seen on desktop. To have the mobile version meet the levels seen on desktop is perhaps indicative of mobile's growth and is certainly a statement of Google considering the Local Pack of primary importance on mobile.

Featured Snippets - Filling A Gap

Nothing more needs to be said about the importance of Featured Snippets. That considered, the feature does take up a considerable amount of mobile SERP space. Yet, Featured Snippet mobile data trends have long mirrored that of desktop. In this instance, we looked back to the start of 2017 so as to highlight the similarity in Feature Snippet showings on both devices.

% of Page One SERPS with a Featured Snippet



What of course stands out here is the large gap between the mobile and desktop data that pervaded large amounts of Q2 and Q3 in 2018. The widening of the gap between mobile and desktop Featured Snippets is both the widest and longest divide between the data trajectories over the past two years.

Mobile vs. Desktop Differential

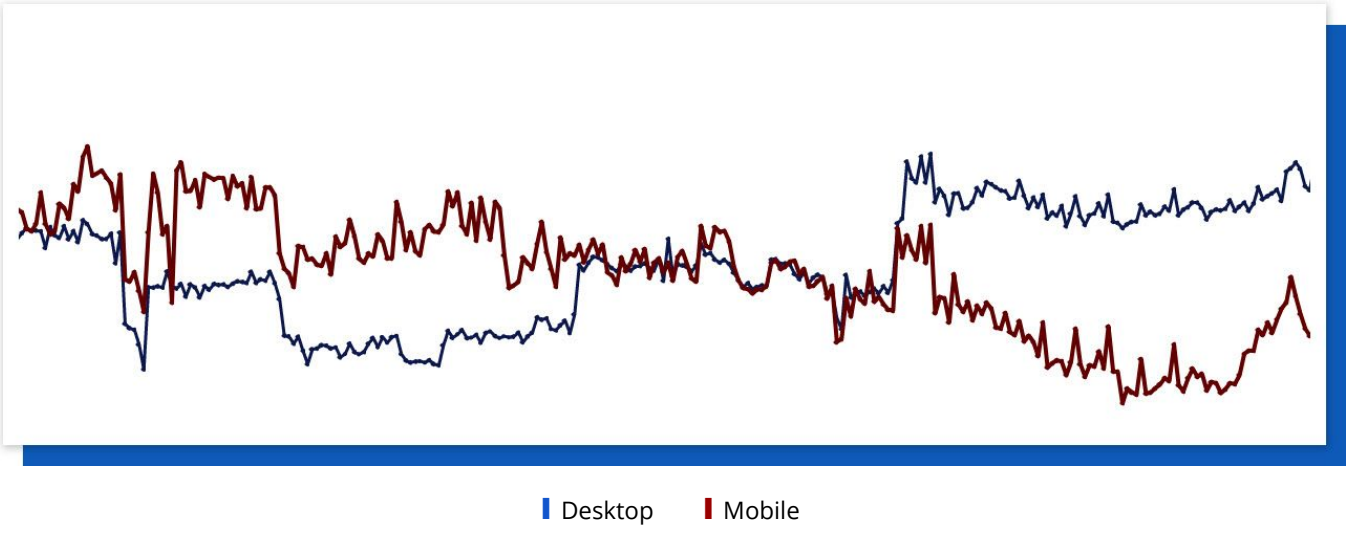
	Start of **Q3:** **4.3 points**	**Q4:** **0.3 points**

While the data trends returned to normal by year-end, the divergence is an interesting event that appears to represent Google's testing the notion of running mobile Featured Snippets along its own data path, one that is significantly lower than what is seen on desktop.

KNOWLEDGE PANELS - CLOSELY UNRELATED DEVICE TRENDS

The data on Knowledge Panels for 2018 shows a lasting, though not excessive, divergence between its mobile and desktop showing. Yet, interestingly, there were two prolonged periods, one in Q1 and the other in Q3, where the feature's performance across both devices matched.

% of Page One SERPS with a Knowledge Panel



Desktop Mobile

Knowledge Panel 2018 Differentials

Q1:	Q3 (Mid-Quarter):	Q4:
1.2 points	.1 points	1.7 points

Differential Increase Mid-Q3 to End of Year: 1,599%

The multiple and prolonged instances where the Knowledge Panel's mobile showing ran parallel to desktop levels is all the more significant and indicative of the value Google ascribes to the feature and its impact on user experience on the SERP. This comes as the percentage increase in differential from mid-Q3 to end of year levels was quite significant.

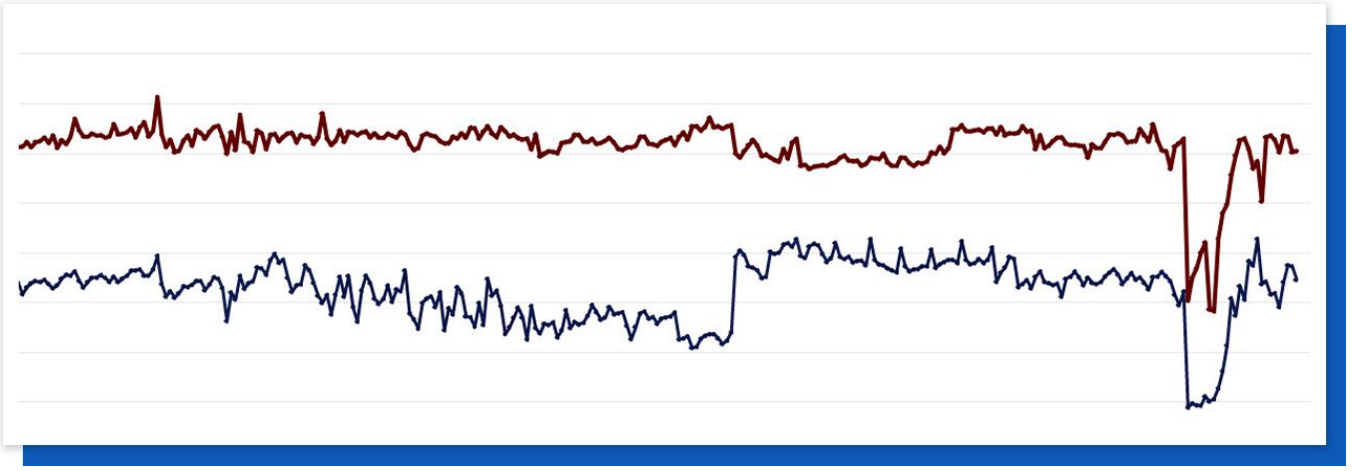
DEVICE DIFFERENTIATED SERP FEATURE DATA TRAJECTORIES

There are a series of SERP features that show a clear and demarcated divergence across device. The features within this category may at times show both parallel or inverse data trajectories. That said, the level of a feature's display across mobile and desktop may meet during limited stretches of time. However, the SERP features to be discussed here have shown an overall level of SERP display that is divergent across devices.

PLAs - A CLEAR MOBILE PERFORMANCE

Google has a clear preference for its mobile PLAs. A wide gap between mobile and desktop PLAs aligns nicely to the IAB's 2018 study that indicates search ads are being driven not by desktop spending, but by mobile ad revenues.

% of Page One SERPS with a PLA



The gap between PLA performance on the two devices was constant throughout the year. However, and as has been seen with numerous features, the start of Q4 has seen that gap dissipate to an extent.

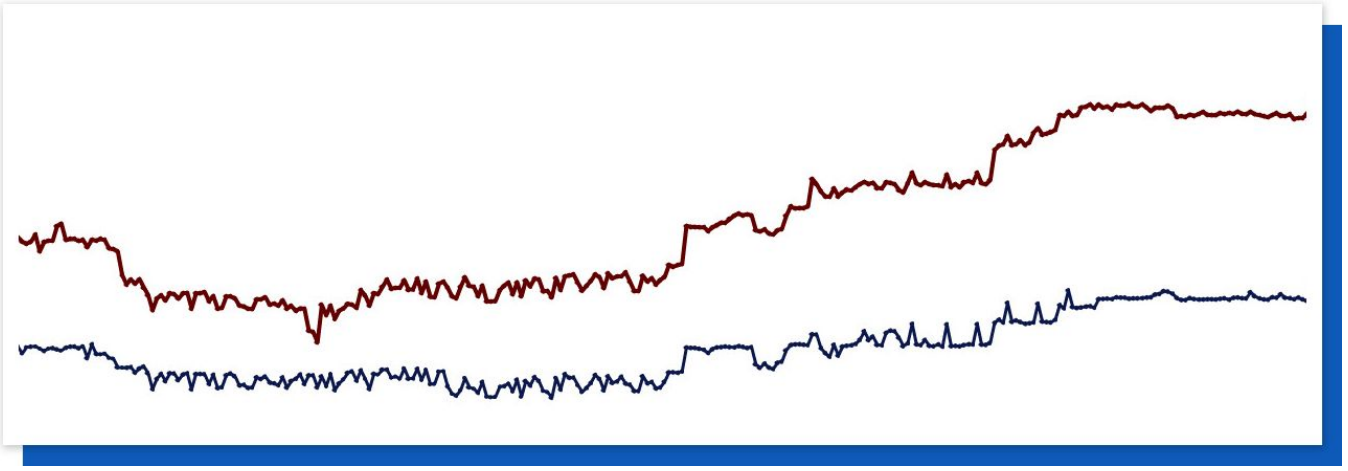
PLA Device Differentiation 2018

	Q1: 20.5 points	Q4: 15 points	Differential Decrease: 26.8%

Related Questions - A Growing Gap

A few trends stand out when looking at the Related Questions (People Also Ask) feature. Not only do the trends show a growing divide between desktop and mobile display levels but the SERP feature has undergone a dramatic upwards shift across both devices.

% of Page One SERPS with Related Questions



The growth of Related Questions is unique in that it is both a transparent trajectory shift and is largely represented by continuous and sustained growth, not one-time large-scale shifts.

Related Questions Growth 2018

Desktop: 89.2% growth	**Mobile:** 145.8% growth

As mobile Related Question growth has outshined the feature's desktop increase, the gap between its display levels across both devices has significantly widened as well:

Related Questions Device Differential

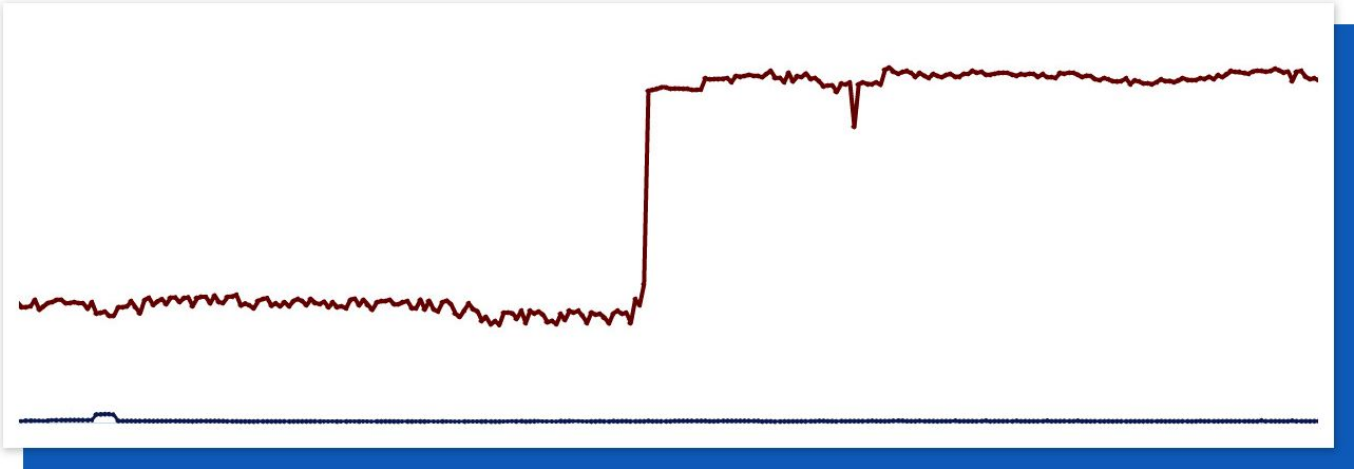
Q1: 3.9 points	**Q4:** 21.7 points	**Differential Increase:** 456.4%

Image Thumbnails

When discussing diverging SERP feature display level patterns across devices, Image Thumbnails must be discussed. There has been a long-running trend that has the feature running at both

different levels on mobile than on desktop and on a different trajectory altogether. Unlike other diverging features, Image Thumbnails do not show similar data trends/trajectories across each device.

% of Page One SERPS with at Least One Image Thumbnail Result



Desktop Mobile

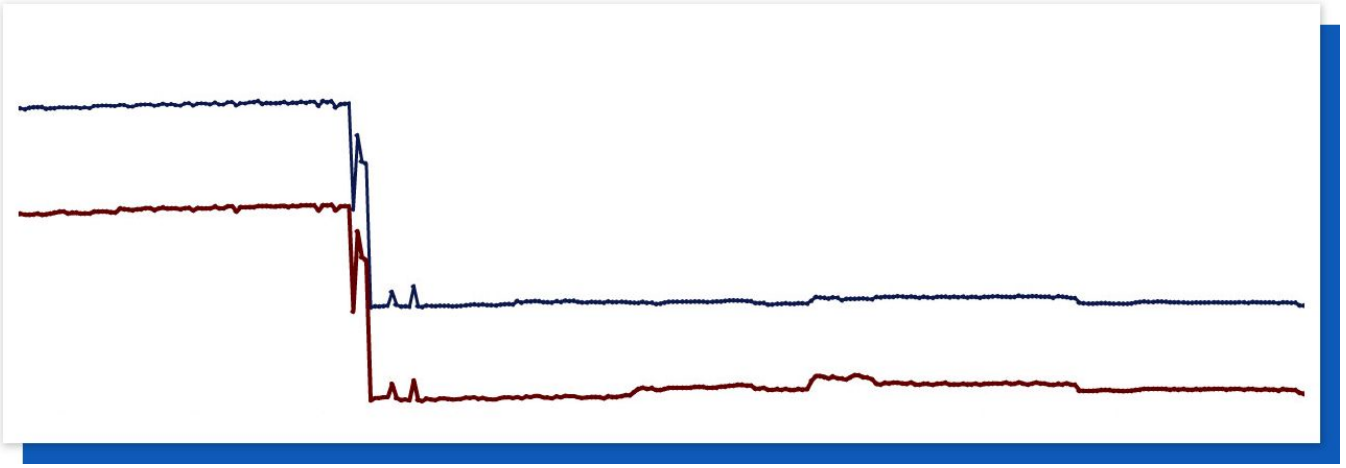
2018 saw another year of large mobile Image Thumbnail growth which has only widened the gap between the feature's performance on mobile from that of desktop.

Image Thumbnail Growth in 2018

Title & Description Length: Desktop vs. Mobile

Due to the vast space differences between desktop and mobile, description lengths tend to differ greatly between the two devices.

Description Length Averages



Desktop Mobile

Noting the similarity between description length data trajectories across both devices, it stands to reason that any difference in length between mobile and desktop is due to space capacity.

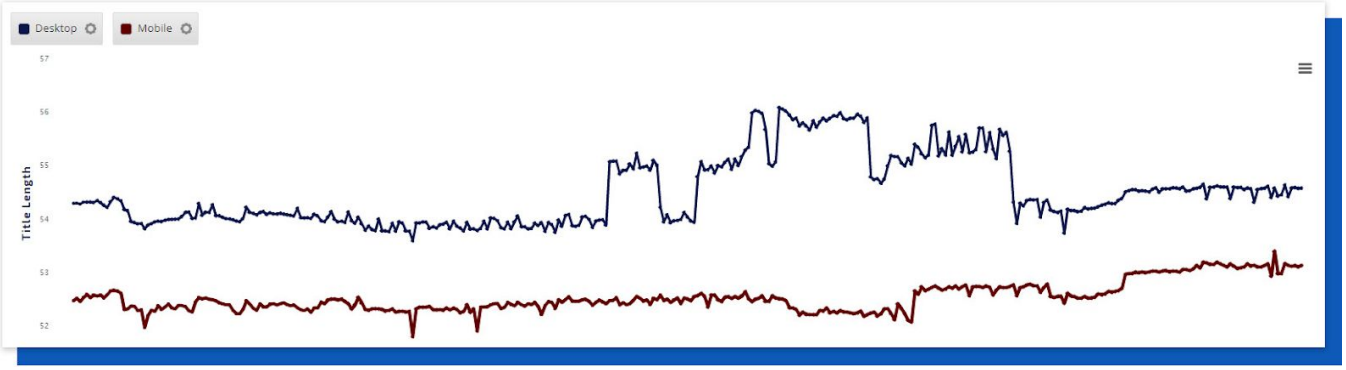
The gap between the length of descriptions on desktop versus that of mobile has remained all but constant throughout 2018 with a bit of narrowing seen by year's end.

Description Length Differential 2018

Q1:	Q4:	Decrease in Differential:
35.2 points	26.3 points	25.3%

Title length, on the other hand, does not seem to be impacted by mobile's limited space. There is but a slight difference in the average number of characters Google allows to be placed within a mobile title versus that of a desktop title. Despite a slight divergence that lasted from Q3 through part of Q4, the data trajectories on both devices have been a close match.

Title Length Averages



Desktop Mobile

The similarities in the trends bear themselves out when looking at the gap in title length on desktop as compared to mobile.

Title Length Differential Across Device 2018

Q1:	Q4:	Change:
1.8 points	1.6 points	-11%

There was but a .2 point change in the Q1 and Q4 title length differential, which reflects a slight narrowing the gap, but does not seem to be reflective of any trajectory change.

WHERE MOBILE VS. DESKTOP FEATURE TRENDS LEAD US

Despite the great difference between these two devices, there's more commonality than meets the eye here. While the display levels are often different, and for good reason, most SERP features travel along a similar data path across both devices. That is, they very much share similar ups and downs, just to varying extents.

That said, there seems to be a growing divide between the display levels of many features on mobile vs. desktop. Q4 of 2018 saw a general increase in the gap between mobile display levels in comparison to desktop. While important to note, this trend still needs to be watched as it is highly possible that Google will reverse the trend at some point going forward.

Due to this, we highly recommend a long-viewed SERP feature analysis. While looking at 30-day SERP feature trends can be incredibly helpful and insightful, it's both hard to judge your performance as well as gauge the overall environment by doing so. SERP feature trends and data should ideally be analyzed over long periods of time so as to accurately give context to the undertaking.

SERP Feature Fluctuations in 2018

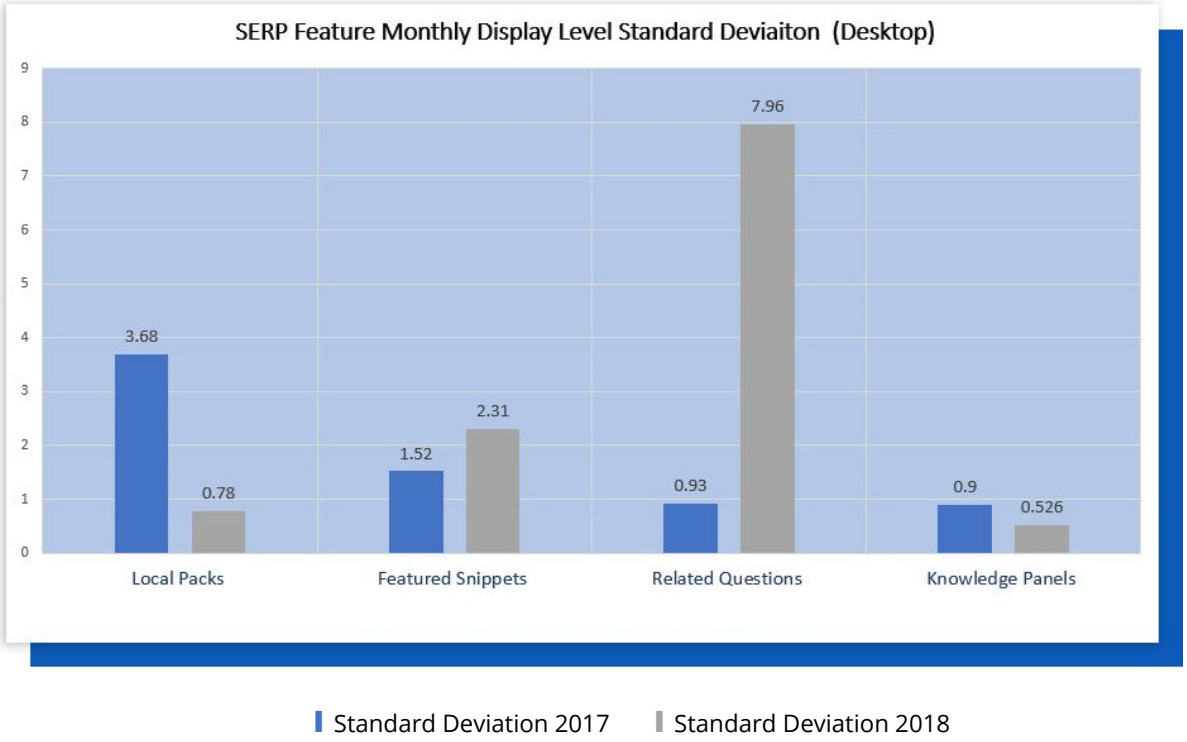
A lot of "search" talk revolves around rank stability vs. rank volatility. Here though, we'd like to look at SERP feature fluctuations. Which features are more subject to change in their levels of display? Are SERP features getting more or less stable? What does SERP feature volatility look like on desktop vs. mobile?

ON SERP FEATURE VOLATILITY DATA

To ascertain just how stable or volatile a SERP feature is we compared a given feature's data in 2018 to that of 2017 we first collected data on a given SERP feature's page one display level from various points during each month of 2017 and 2018. The monthly averages were used to track the change in a feature's SERP showing from month-to-month. Using this data we were able to determine the standard deviation for each of the SERP features we studied. Lastly, we compared a feature's standard deviation from 2017 to that of 2018 per device, resulting in a pretty good look at the feature's relative stability.

Now for the results.

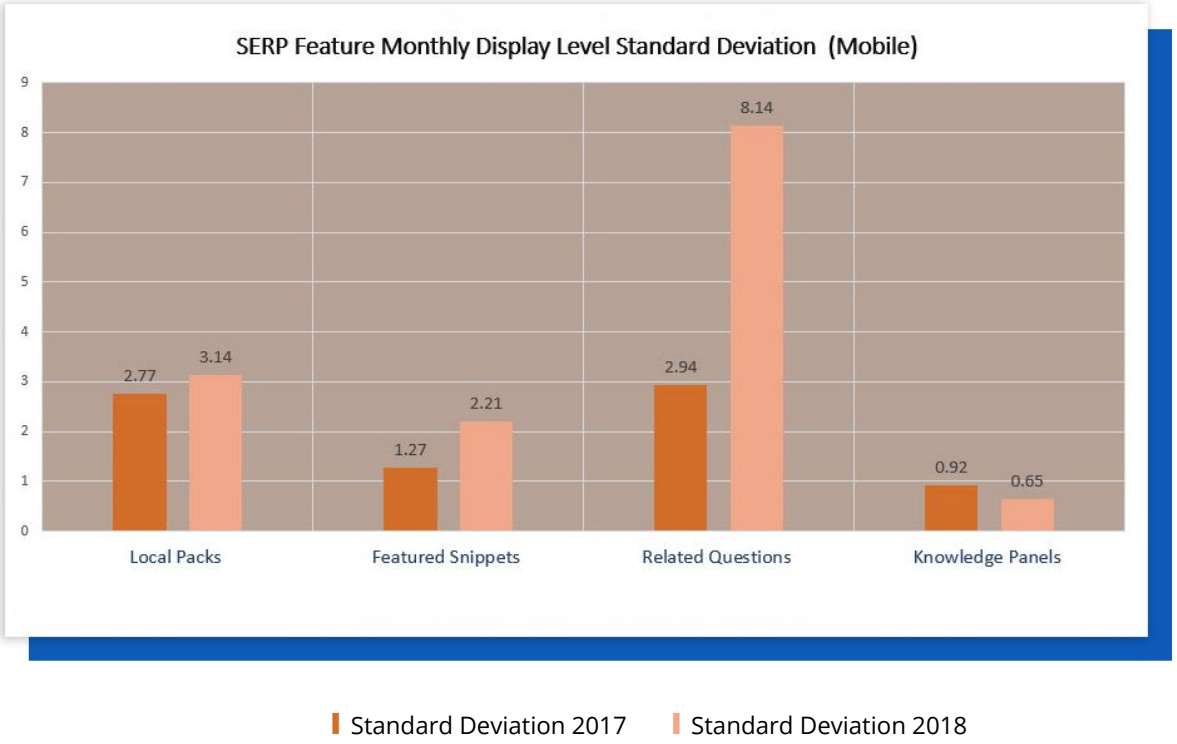
DESKTOP SERP FEATURE STABILITY IN 2018



Featured Snippets and Related Questions are often paired together on the SERP (as will be shown later). It is thus interesting that of the four SERP features studied, both Featured Snippets and Related Questions showed an increase in fluctuations from 2017 to 2018. In specific, a 52% and an astounding 756% increase in fluctuations respectively. The increase in Related Questions fluctuations is consistent with the numerous shifts the feature had undertaken throughout 2018 resulting in an increased level of SERP display of nearly 90% (as noted earlier).

At the same time, both Local Packs and Knowledge Panels showed a more consistent display level from month-to-month in 2018. In fact, Local Packs have seen a 31% decrease in its month-to-month changes and Knowledge Panels a 79% decrease. That is, these features were subject to far fewer changes and were far more consistent in 2018 than they were in 2017.

MOBILE SERP FEATURE STABILITY IN 2018



Mobile SERP feature fluctuations showed very similar trends to that of desktop. Here too, both Featured Snippets and Related Questions saw noticeable upticks in the fluctuations of their month-to-month display levels. Here again, the standard deviation of Related Questions was due to Google consistently placing them on more and more SERPs each month. That is, the feature was not subject to monthly gains and losses so much as it was given a display level boost.

What stands out here, however, is the increase in the standard deviation for Local Packs. That is, in 2018 the monthly display levels for this feature were a bit less consistent than they were in 2017. This too was due to Google's proliferation of Local Packs on mobile. While Google did increase the feature's display level in 2017, it did so slowly and gradually. In 2018, however, the feature underwent more dramatic spikes as part of its overall proliferation.

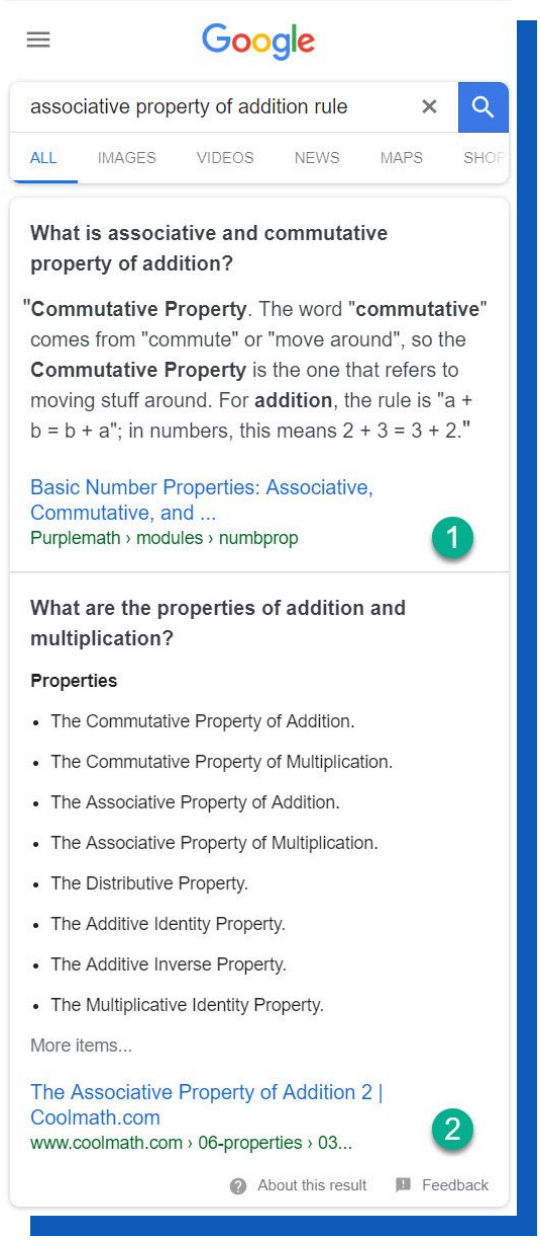
DESKTOP VS. MOBILE SERP FEATURE FLUCTUATIONS IN 2018

Putting all of the above data together, and leaving 2017 vs. 2018 performance aside for a moment, there are clearly more and less "consistent" SERP features. The trend across devices shows that Related Questions undergoes the most change in its SERP display levels relative to the other three features. That said, the standard deviations recorded on desktop compared to those seen on mobile in 2018 were not far off to the exception of Local Packs.

SERP Feature Dynamics in 2018

Despite the obvious need and desire for hard data, it is not entirely possible to gauge the state of the SERP without undertaking a more holistic analysis. That is, not every change Google makes can be entirely quantified. The search engine can make any number of changes that cannot be fully captured by pure data. The following is a look at some of the more notable dynamics seen on the Google SERP in 2018 both from a holistic and data-driven perspective.

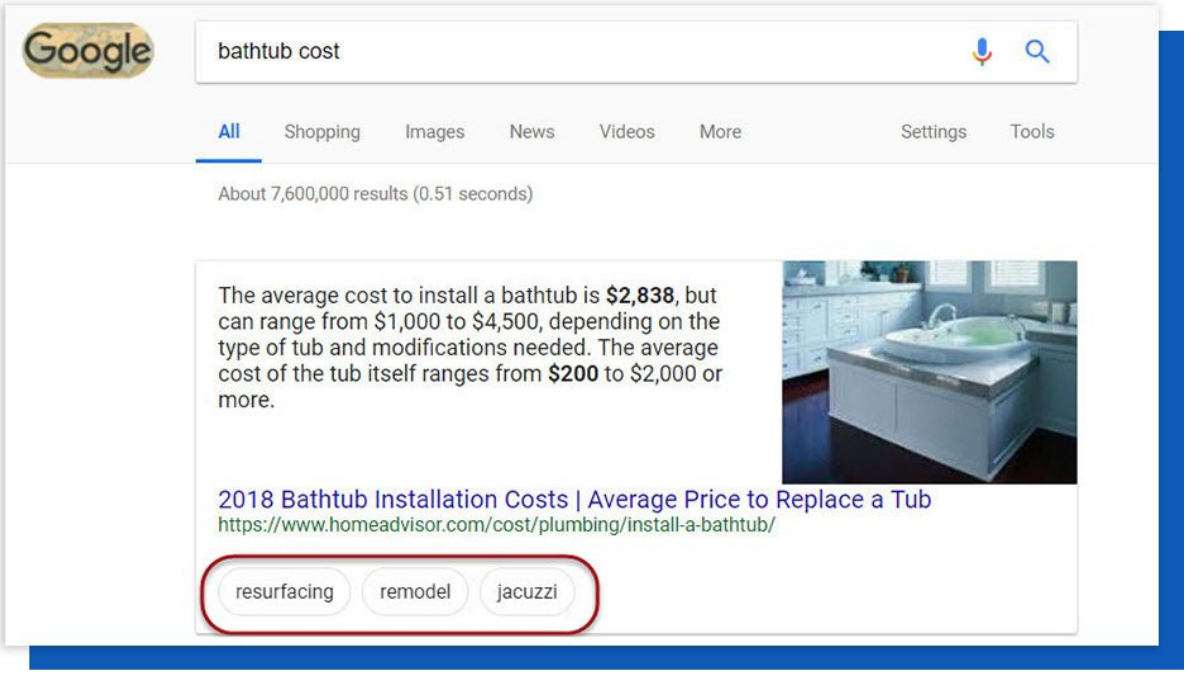
FEATURED SNIPPETS & MACHINE LEARNING ON THE SERP



One of the year's more notable observations was what seems to be an almost undeniably larger machine learning influence over Google's SERP features. This was most clearly expressed by the numerous new Featured Snippet formats introduced in 2018.

Over the course of the year, Google has introduced an array of new Featured Snippet variations that have one common theme, a greater targeting of user intent. Perhaps the most clearly recognizable instance of this has been the introduction of multifaceted Featured Snippets, which offer a user a broader and more continuous set of information.

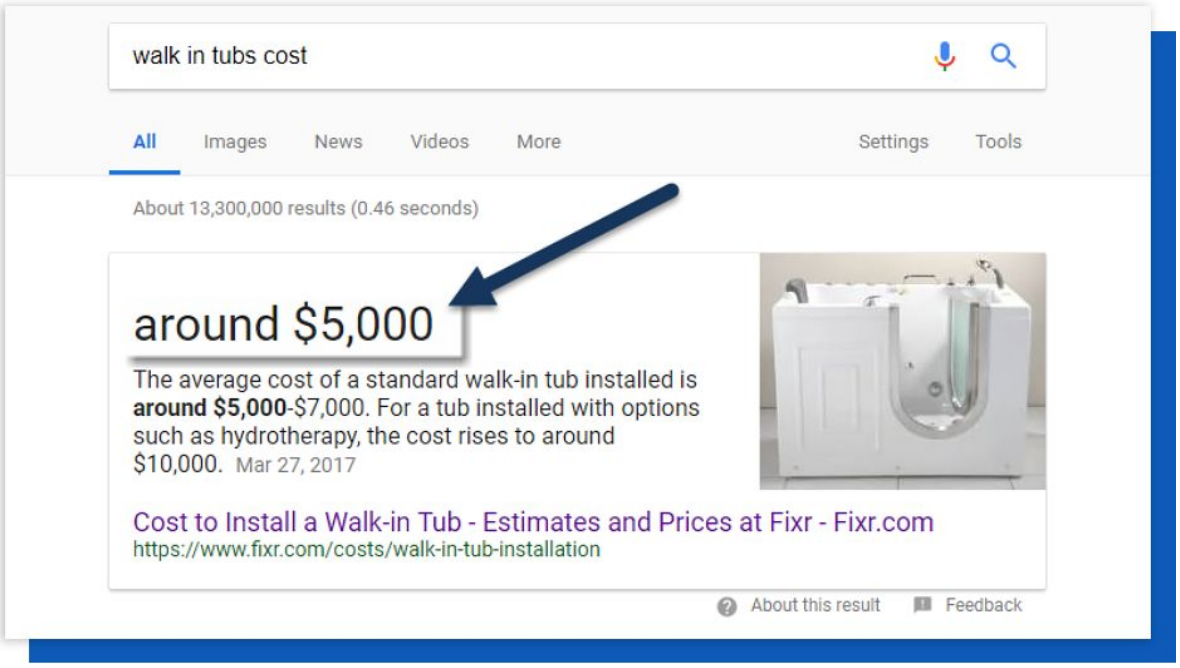
This pattern extended far beyond multifaceted Featured Snippets. 2018 also saw the introduction of the Featured Snippet bubble filter.

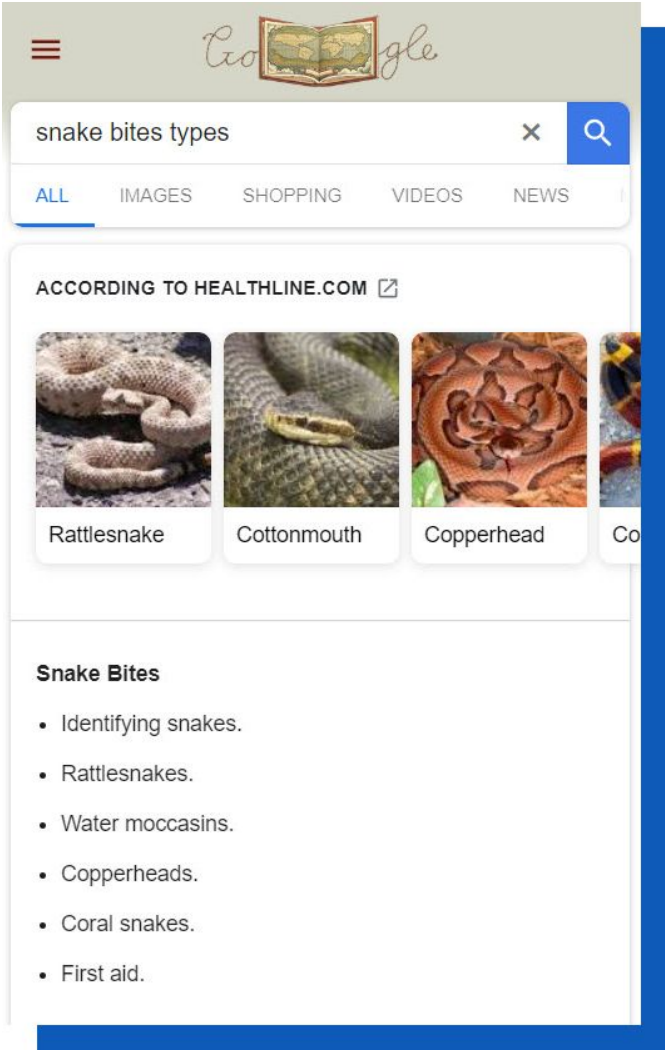


The filter is self-evidently a way to either refine a user's query, extend their search journey, or meet the needs of multiple intents simultaneously. Either usage points to a far deeper understanding of user intent which is often attributed to Google's machine learning properties.

Bubble Filters in Featured Snippets

Other Featured Snippet formats that indicate machine learning's influence were introduced to the SERP in 2018. Featured Snippets with titles that in effect turned the feature into a variance of a Direct Answer are currently employed by the search engine. More, we've found that Google is strategic in the use of this format. That is, Google has been taking the bolded content of a Featured Snippet and, when it feels it appropriate to do so, is now showing that content as a makeshift header:





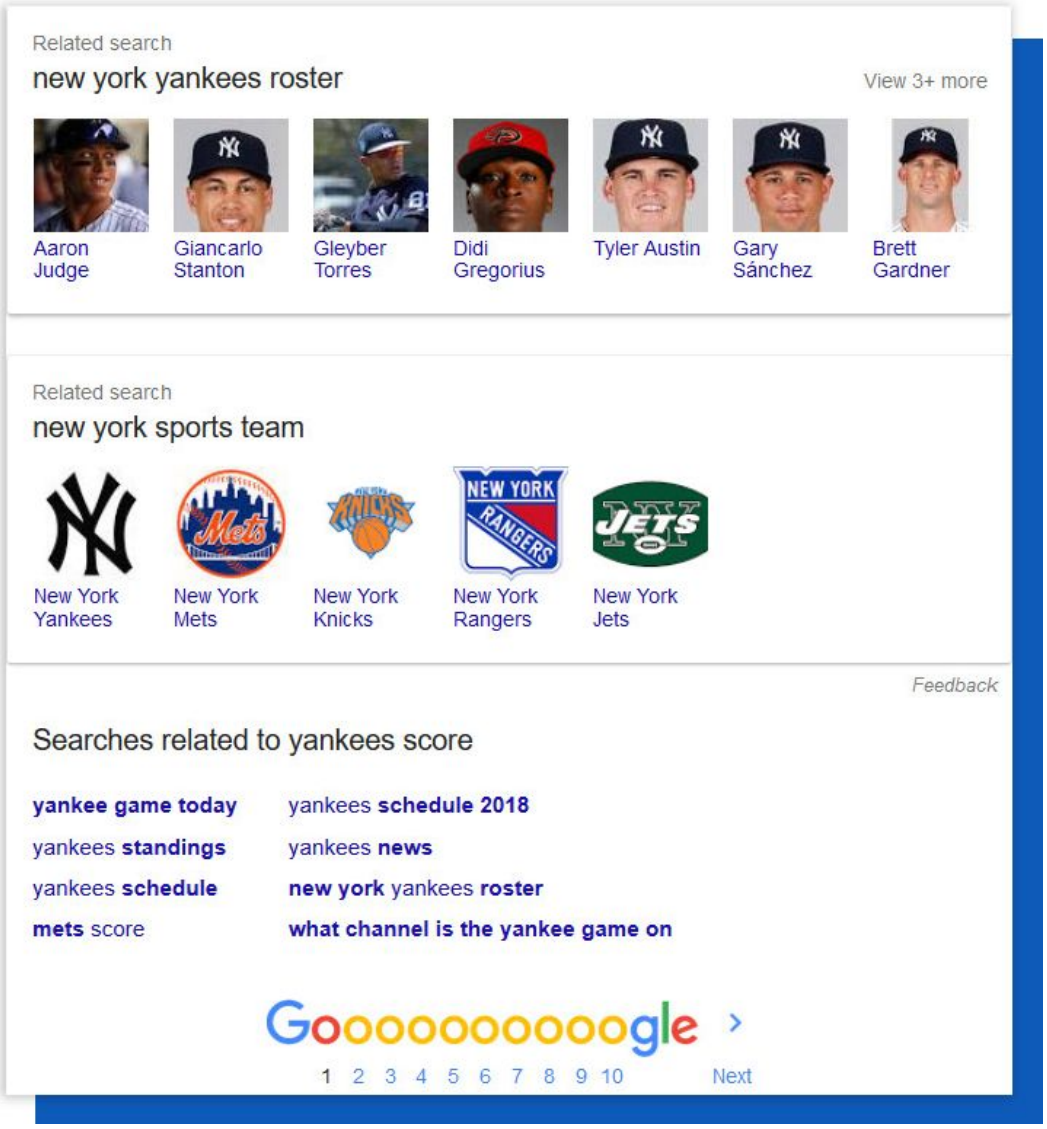
Lastly, as Featured Snippets are concerned, we've noticed an increase in Google's ability to offer accentual content within the Featured Snippet when its interpretation of the query demands it.

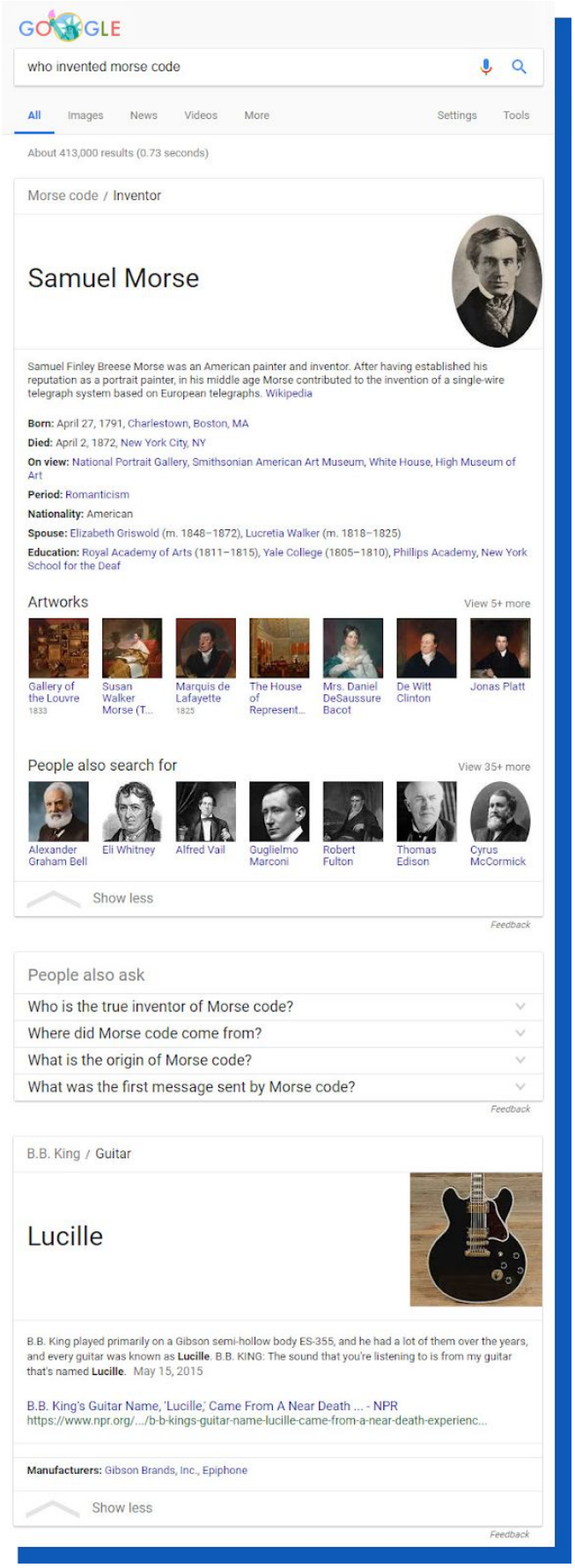
An example of this is the insertion of a carousel of images that offer a gateway into related content. In this way, Google at times inserts what is the equivalent of the People Also Search For carousel inside of Featured Snippets.

A MORE ENERGETIC USE OF SERP FEATURES

Featured Snippets were not the only area where we saw machine learning exert a heavier hand. Google has begun to execute a more energetic use of its SERP features to highly target user intent. The most known case is the 20th anniversary update Google made to the mobile Knowledge Panel, which now often shows with tabs that are custom fit to the entity being showcased.

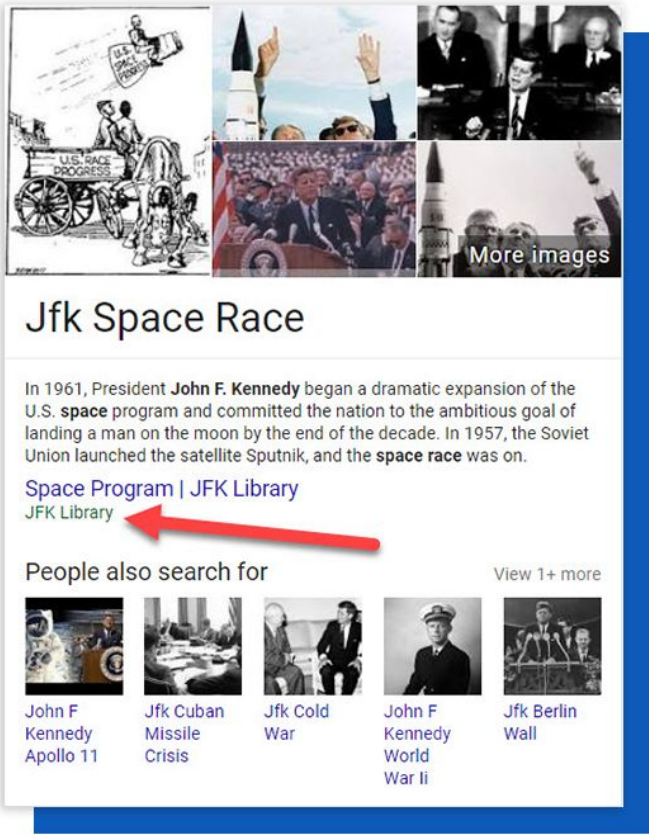
Custom-tabbed Knowledge Panels are far from the only instance of Google using its SERP features to highly target multiple user intents. In 2018, we have seen Google attempt to target multiple intents by bolstering its SERP features to include more varied content, such as showing multiple Related Search boxes, each aligned to its own intent:





Moreover, 2018 has seen the advent of the hybrid SERP feature. These hybrids combine elements of multiple SERP features in order to target numerous user intents simultaneously.

Some of the more common examples of this tactic are the combination of Direct Answers and Knowledge Panels as well as the merging of the Direct Answer into the Featured Snippet.



Most notably, Google has merged Featured Snippets together with Knowledge Panels to form what the search engine refers to as the Explore Panel. Unlike a Featured Snippet, this desktop feature appears to the right of the results like a Knowledge Panel does. It also contains a set of images much the way a Knowledge Panel tends to do. However, the Explore Panel appears with a URL pulled from the organic results.

After surveying the keywords that produce the Explore Panel, we've determined that Google often makes use of it when the query reflects a "snapshot" of the entity. Due to Google's increased ability to interpret intent, it now seems to know when a query, while relating to an entity, reflects but a sliver or a snapshot of the overall entity.

The Explore Panel's SERP Presence:
2% of Page One SERPs

WHAT BECOMES IMPORTANT WITH A NEW SERP FEATURE PRESENCE

There are a variety of ways to parse the impact of Google not only targeting multiple intents but doing so more energetically than ever. How this impacts a site all depends on the site, what keywords it targets, and the like.

That said, there is plenty to point out. Here are our two main points of consideration:

1) The first and more evident point is that the SERP is far more competitive. More comprehensive SERP features energetically placed on the SERP means a shift in competitive perception is on the table. Previously, a SERP and the level of competition on it has been defined by the ranking sites. While there have been murmurings within the SEO community to give more weight to SERP feature presence, it is arguably time to fully embrace the notion. That is, a SERP and the traffic potential it brings should be judged by the SERP features Google employs on it in equal consideration to the sites you may be competing with. To this extent, if your site competes on SERPs that are heavily laden with a smattering of features, it does not seem far-fetched, in our eyes, to consider a new strategy so as to compete on a less feature heavy SERP.

2) The increase in intent driven SERP feature elements can also mean opportunity for you. For example, the Explore Panel brings with it the chance for all new pages to be showcased prominently on the SERP. It's, as such, important to not only keep up with the changes to the SERP vis-a-vis new features and new feature elements but also what drives these features. With that understanding, our advice is to create comprehensively **broad** content that considers both the multiple reasons a user would utilize such content and what the next step for the user is after engaging with it. Search, and Google's way of engaging its search users, is quickly becoming about "search journeys." When forming a content strategy, and as seen in elements such as multifaceted Featured Snippets and Feature Snippet bubble filters, we recommend considering both the subtopics related to the essential purpose of your content as well as where users are likely to head next. By doing as such you have a stronger chance of not only scoring more SERP feature wins but aligning to Google's very method of showing search results from a strategic perspective.

SERP FEATURE PAIRING TENDENCIES

As mentioned, there are both qualitative and quantitative ways to survey the SERP and Google's treatment of it vis-a-vis SERP features.

Below is an audit and analysis of Google's tendencies to pair two SERP features together on the same results page. In executing this survey, we took one "initial" SERP feature and analyzed how often (by percent) it was paired with another SERP feature (to be referred to as the "paired feature").

The inverse was also analyzed. That is, we calculated the total number of SERPs within our dataset that contained the "paired feature." We then determined the percentage of "paired feature" SERPs that also contained the initial feature.

For example, we looked at the percentage of video carousel (i.e., the initial feature) SERPs within our dataset that also contained a Featured Snippet (i.e., the paired feature). We also looked at what percent of all Featured Snippet SERPs contained a video carousel.

The data below reflects Q4 of 2018 on desktop (US).

Video Carousels - The Universal Donor

Video Carousel SERP Feature Pairings

Paired SERP Feature	% of All Video Carousel SERPs with Paired Feature	% of Paired Feature SERPs with Video Carousel
Featured Snippets	15.52%	55.48%
Knowledge Panel	11.58%	56.23%
Local Pack	24.38%	35.79%
Top Stories	2.08%	56.34%
Related Questions	36.96%	58.11%
Ads	30.71%	53.46%
PLAs	30.21%	62.00%

The second column of this chart indicates the percentage of all the SERPs that contained the paired feature with the video carousel also appearing on the page. For example, of all the SERPs that contained a Featured Snippet, a video carousel also was displayed 55.48% of the time. The first data column presents the inverse. Here we analyzed the total number of SERPs that contained a video carousel and the percentage of times the paired feature also appeared on the page. In this instance, the 15.52% shown in the first row shows the percentage of times Featured Snippets appeared on all SERPs that contained the video carousel.

The strongest trend seen here is the universality of the video carousel. No matter the feature paired with it, the video carousel appeared on over 50% of all of the SERPs produced by the paired feature, to the exclusion of Local Packs. That's downright amazing.

Conversely, Google has a greater tendency to show Related Questions, Ads, and PLAs on video carousel SERPs.

Featured Snippets - Ads as a Visibility Competitor?

Featured Snippet SERP Feature Pairings		
Paired SERP Feature	% of All Featured Snippet SERPs with Paired Feature	% of Paired Feature SERPs with Featured Snippet
Knowledge Panel	5.44%	7.39%
Local Pack	7.11%	2.92%
Top Stories	1.81%	13.72%
Related Questions	70.52%	31.01%
Ads	27.70%	13.49%
PLAs	15.20%	8.72%

Unlike video carousels, Google does not have a strong propensity to pair Featured Snippets with other features other than Related Questions. Interestingly, there are a relatively large number of ads on SERPs that produce a Featured Snippet (27.7% of all SERPs that contain a Featured Snippet also contain an ad, while 13.49% of SERPs that contain an ad also contain a Featured Snippet). This would indicate the intriguing possibility of a user seeing an ad before ever reaching the page's Featured Snippet dispelling the notion that the zero position box is the first thing to hit a user's eyes.

Local Packs - A Strong Ad Correlation

Local Pack SERP Feature Pairings		
Paired SERP Feature	% of All Local Pack SERPs with Paired Feature	% of Paired Feature SERPs with Local Pack
Knowledge Panel	1.97%	6.50%
Top Stories	1.46%	26.96%
Related Questions	16.78%	17.97%
Ads	25.18%	29.86%
PLAs	13.65%	19.08%

Like Featured Snippets, Google tends to leave Local Packs in isolation to the exclusion of its ad properties (Google Ads and PLAs) and the Related Questions feature. Unlike Featured Snippets, the Local Packs pairing with ads was more of a "two-way street." Here, Local Packs appeared on north of 25% of all SERPs that produced a Google Ad while ads appeared on more than 25% of all SERPs that produced a Local Pack.

Knowledge Panels - A New Content Connection

Knowledge Panels SERP Feature Pairings		
Paired SERP Feature	% of All Knowledge Panel SERPs with Paired Feature	% of Paired Feature SERPS with Knowledge Panel
Top Stories	5.76%	32.20%
Related Questions	33.23%	10.76%
Ads	22.82%	8.19%
PLAs	6.47%	2.73%

The SERP feature pairings where the Knowledge Panels is concerned is a bit less patterned than what was seen for the features discussed above. There is, however, an interesting tendency for Google to show the Knowledge Panel on over 30% of all SERPs that produced a News Box. This is logical in that news content often relates to entities. As a result, keywords for news content may often include enough of a reference to an entity so that the Knowledge Panel appears on the same SERP.

WHAT THE SERP FEATURE PAIRING DATA SAYS

It's important to consider that there are indeed SERP features that are O+, i.e., that are universal donors. In the data we presented here, Google's video carousel is one of these universal donors.

At the same time, it's worthwhile to note that this is not a two-way street. Just because one feature, for example, a video carousel, appears on a large number of SERPs for another feature does not mean that there is a reciprocal relationship. The video carousel appears on north of 50% of all Featured Snippet SERPs, but Featured Snippets only appear on 15% of all the SERPs that contain a video carousel.

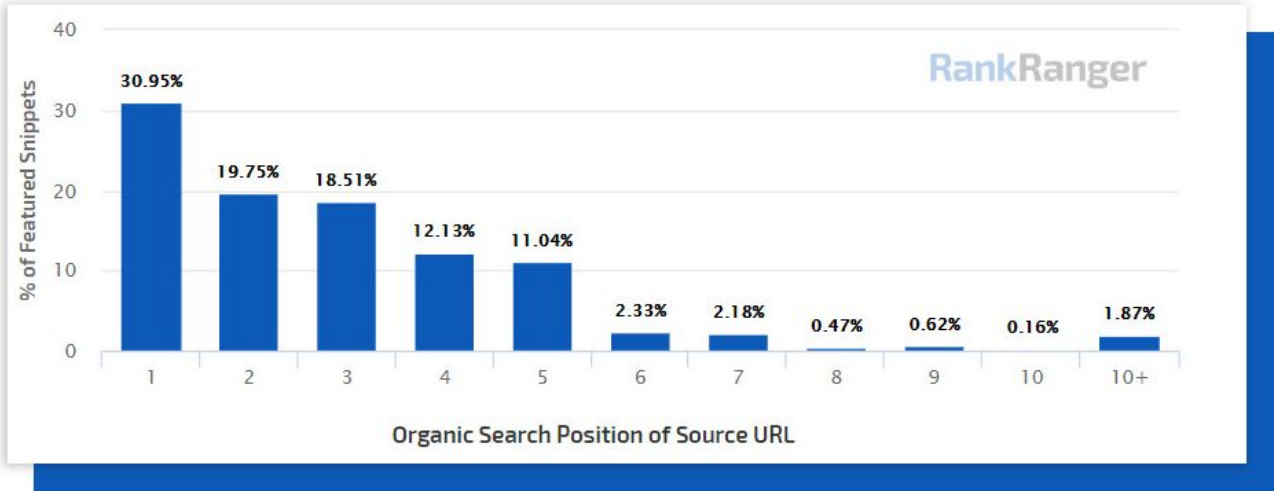
Of course, it goes without saying that it pays to know what Google tends to show on the SERP with a given SERP feature.

Featured Snippets Trends & Tendencies in 2018

As already alluded to, 2018 saw significant changes to Featured Snippets from a variety of perspectives. Here we'll get into the trends related to Featured Snippet URLs. Specifically, what rank positions they tend to come from and how stable their placement is.

FEATURED SNIPPET AVERAGE URL POSITION

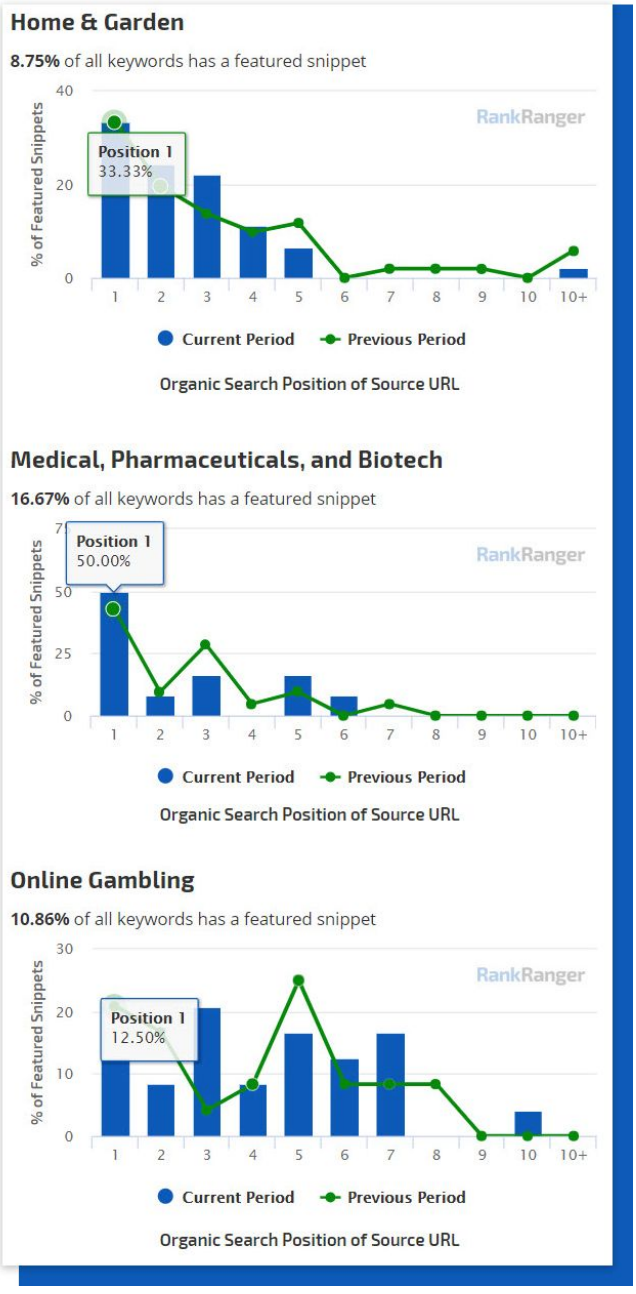
Featured Snippets, of course, pull their URLs from the first page of search results. That said, there is no hard and fast rule that dictates which page one position these URLs must come from. In fact, and contrary to what is perhaps the expectation, the majority of Featured Snippets do not obtain their URLs from the first position on the SERP.



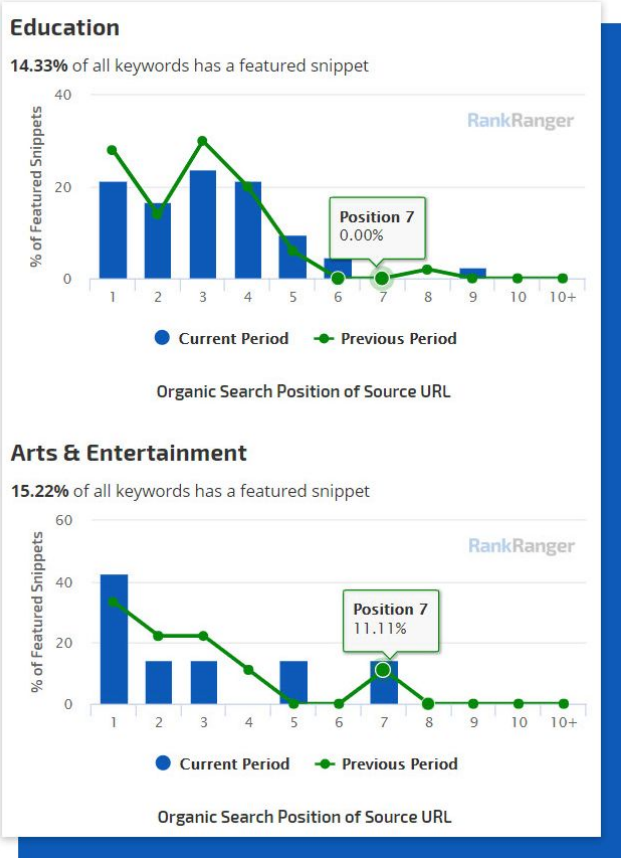
According to our data, more Featured Snippet URLs came from positions two and three than from the top spot on the SERP.

Per Niche Feature Snippet URL Positioning

The data above is an aggregate of the numerous niches we monitor. While it reflects the overall trends, it does not at all represent URL position trends within a given niche.



While there are niches that trend similar to the aggregate data such as the *Home & Garden* industry, others more heavily favored the first ranking position (see *Medical, Pharmaceutical, & Biotech*) while others like *Online Gambling*, saw significantly **fewer** Featured Snippet URLs come from the first position (as well as a more even distribution all the way through to the seventh spot on the SERP).



Still, other differences presented themselves across various niches, with one industry significantly favoring one position over another.

For example, the *Arts & Entertainment* niche had 11% of its Featured Snippet URLs come from position seven while the *Education* industry had 0% of its URLs sourced from that position on the SERP.

Featured Snippet URL Position Takeaway

The glaring implication of a per niche analysis of the source of a Featured Snippet's URL is that industry matters. From a positions perspective, certain industries are more demanding than others. Getting your URL in a Featured Snippet if your site falls into the *Medical, Pharmaceutical, & Biotech* niche is, on average, going to demand you rank in the first position more often than not.

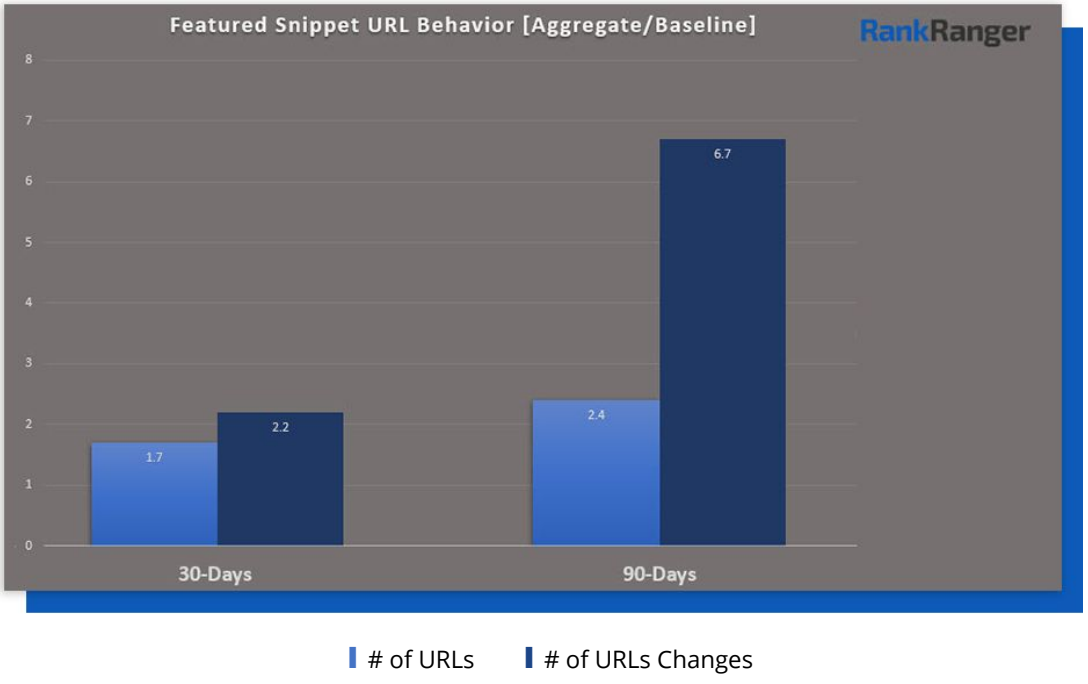
Sites within the *Online Gambling* industry are not as limited to that top spot on the SERP. Here, opportunities are not as concentrated into position one but are spread throughout multiple ranking positions.

Still, opportunities within each niche differ beyond only URL position as Google's propensity to show Featured Snippets altogether vary by industry. While circa 17% of the keywords within the *Medical, Pharmaceutical, & Biotech* niche produce a Featured Snippet, only around 9% of keywords do as such within the *Home & Garden* industry.

FEATURED SNIPPET URL STABILITY

We wanted to better qualify what a Featured Snippet win means. One of the questions we were concerned with was how long sites tended to retain their URL's presence within the Featured Snippet. Conjunctively, this endeavor provided insight into how hard it is for a new URL to replace the one Google has already placed inside the Featured Snippet.

To accomplish this we looked at 350 Featured Snippet keywords over both a 30 and 90-day period. During this time we analyzed both the number of URLs Google utilized as well as how many times Google changed the URL inside of a Featured Snippet.

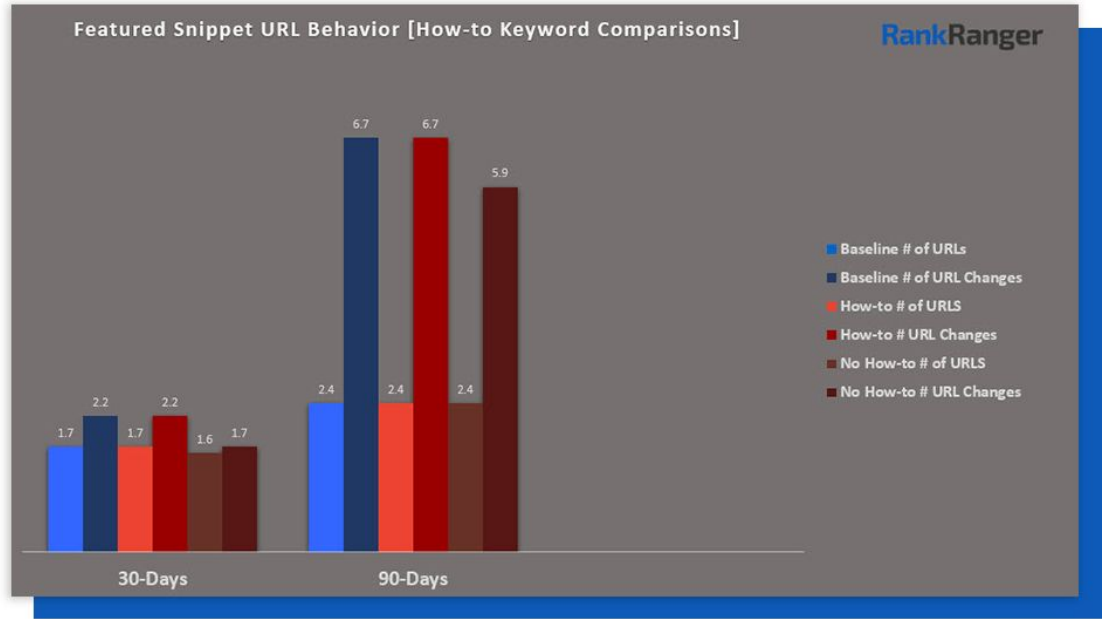


We found that Google tends to, on average, utilize 1.7 URLs over a 30-day period while executing 2.2 URL changes during that time. The data tracked over a 90-day period was relatively proportional with Google utilizing an average of 2.4 URLs within the Featured Snippets studied while undertaking 6.7 URL swaps during that time.

URL Stability Takeaway

What we essentially have here is Google playing with two URLs (slightly less during a 30-day period on average and slightly more over the course of 90 days). Meaning, Google, in general, only considers two URLs for any given Featured Snippet. The search engine then oscillates between placing one of these two URLs within the Featured Snippet.
This is good news should you be one of these two URLs. Perhaps, Google is placing your URL inside the Featured Snippet for but a few days here and there. While not ideal, it does put you in a good position. Meaning, that you are at least in consideration and with a bit of work, could be the dominant URL shown.

At the same time, if you are not one of the two URLs Google oscillates between, getting your page within a Featured Snippet seems to be a more difficult process.



Baseline # of URLs
How-to # of URLs
No How-to # of URLs
Baseline # of URLs Changes
How-to # of URLs Changes
No How-to # of URLs Changes

This tendency, though with slightly fewer URLs utilized per period, applies to various subsets of Featured Snippet keywords. For example, we segmented keywords that were strictly informational (i.e., not reflecting a product in any way) that both did and did not employ the term *how to.* Here the data showed Google changed the URLs within such Featured Snippet fewer times than the baseline keyword set. Still, and despite informational queries reflecting the “bread and butter” of Featured Snippets, the data for these keywords was anything but drastically different than the baseline numbers.

Where We Stand with the SERP

It's hard to boil down a broad look at the SERP. When considering the most important takeaways from the data and analysis shown above we narrowed it down to three overarching themes:

1 - THE MOBILE & DESKTOP SERPs ARE EACH STUDIES UNTO THEMSELVES

Despite some similarities, particularly in overall SERP feature trends, the mobile and desktop SERPs are two different beasts. That is, despite similar SERP feature display levels (at times) and despite similar SERP feature fluctuation levels, it's important to remember that the mobile and desktop SERPS are vastly different. How users interact with each is vastly different, how much space exists above the fold is vastly different, and how the very SERP features appear is vastly different. The mobile and desktop SERPs are not the same. Each deserves and demands its own unique study.

2 - NO SERP FEATURE EXISTS IN ISOLATION & WITHOUT CONTEXT

It's hard to separate a SERP from its situation. Whether it be gauging rank positions fit for Featured Snippet placement or zero position URL stability, context is important. Different niches, different types of queries "behave" differently. While any specific case has its own context, knowing where your site or page fits in categorically can be quite informative. This extends to gauging the impact of your SERP feature "wins." As shown, Google has a varying propensity to pair certain SERP features together. Knowing what shows on the SERP along with your feature "wins" is important when gauging the significance and impact of that score. Ranking #1 inside a video carousel when no other features show on the SERP is not the same as ranking in the first carousel card alongside a Featured Snippet, and vice versa.

3 - WE ARE LIVING IN A NEW SERP ENVIRONMENT

Whether it be through a more energetic approach towards using SERP features or changes to the very way SERP features look (i.e., hybrid SERP features), the SERP has morphed into something else entirely when compared to what it was just a short time ago. What this means is the way we approach the Google SERP must consider the competition level of the features found on the page.

How valuable are top spot rankings when there are so many SERP features on the page? How strong is a SERP's traffic potential considering the SERP features on the page? With a new feature paradigm comes an entirely new level of SERP competition that may at times demand an all-new sort of solution.

A Last Word On the SERP

2018, in many ways, was a novel year on the Google SERP. With Google having adopted a seemingly new direction, one centered on a user's "search journey" - as revealed at the search engine's own 20th birthday event, it will be interesting to see how that impacts the SERP in 2019. We guess we'll just have to see what the state of the 2019 Google SERP shapes up to be!

To learn more about Google's SERP features be sure to visit the Rank Ranger blog.

If you have any questions about this whitepaper or want to learn about how Rank Ranger can help you manage your SEO efforts contact: service@rankranger.com