The State of Search

2022

Global Report

SEMRUSH

Introduction

There's no avoiding the fact that the digital ecosystem is in a state of constant change. This was the case before the pandemic, but 2020 and 2021 sculpted a different landscape altogether.

Marketers in almost every industry were left to grapple with uncertainty, particularly when it came to understanding and adapting to user behaviors in digital and search. Would pre-pandemic trends return to "normal"? Would the impact of the pandemic define the new normal? Would organic search be changed for good?

Today, the feeling of uncertainty still exists for many, but there is much that can be learned from what's happened since early 2020. To help you get to grips with today's search landscape, we bring you the **State of Search 2022**—a comprehensive, 360-degree analysis of Google updates, user behaviors, and SEO actions based on Semrush data collected throughout 2021.

The entire report is region-specific, so you can gather deeper and more meaningful insights into the region that matters to you: US, BR, DE, IT, ES, FR.

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State of the Web

The aim of this section is to help you understand the new state of the web. We explore whether the web is growing or contracting—a pertinent point after periods of extreme growth during the pandemic. We also analyze organic traffic levels for both domains and pages, and, finally, how users interact and behave once they arrive on a site.

Methodology

The data below are based on the organic metrics from Semrush's Domain Analytics. We analyzed the whole database of 160M keywords and their rankings for US-based sites, plus other countries where applicable (more stats for Semrush database sizes can be found here ↬). This applies to everything until the section entitled Traffic Analysis: The Top 100K Domains.

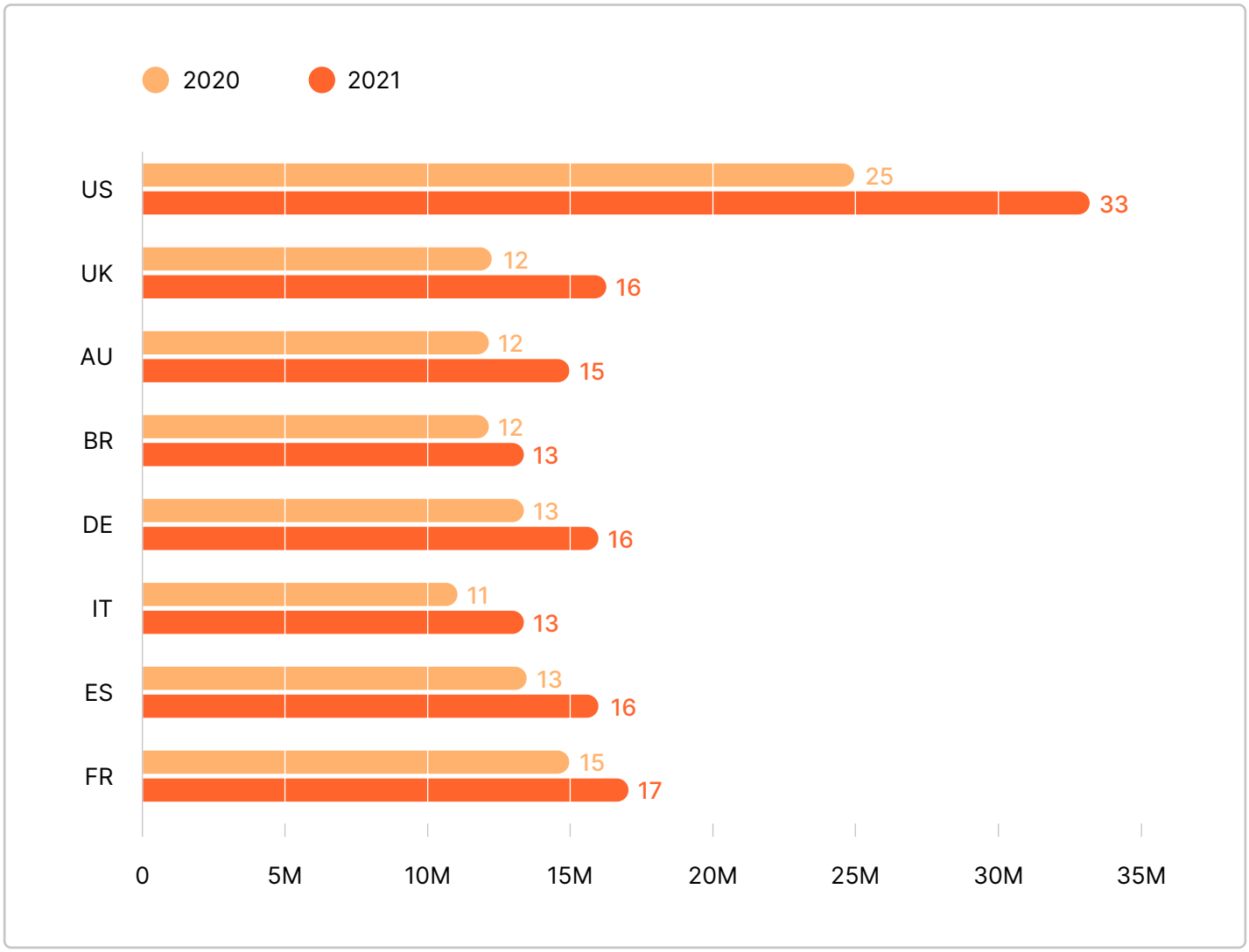
The Number of New Sites & URLs

One of the most notable COVID-19-related shifts in digital was the increased focus on having an online presence in 2020. The question is: did that trend change in 2021 as inoculation began and a degree of normalcy returned in various regions, or did the expansion of the web continue?

To help answer this, we looked at the number of newly ranked domains in eight different markets in both 2020 and 2021. To qualify as a ranking domain, the site had to rank at least one URL within the top 100.

We used this top 100 to determine the average trends related to new site creation across the web. Here are the numbers of newly ranked domains by region compared to the previous year.

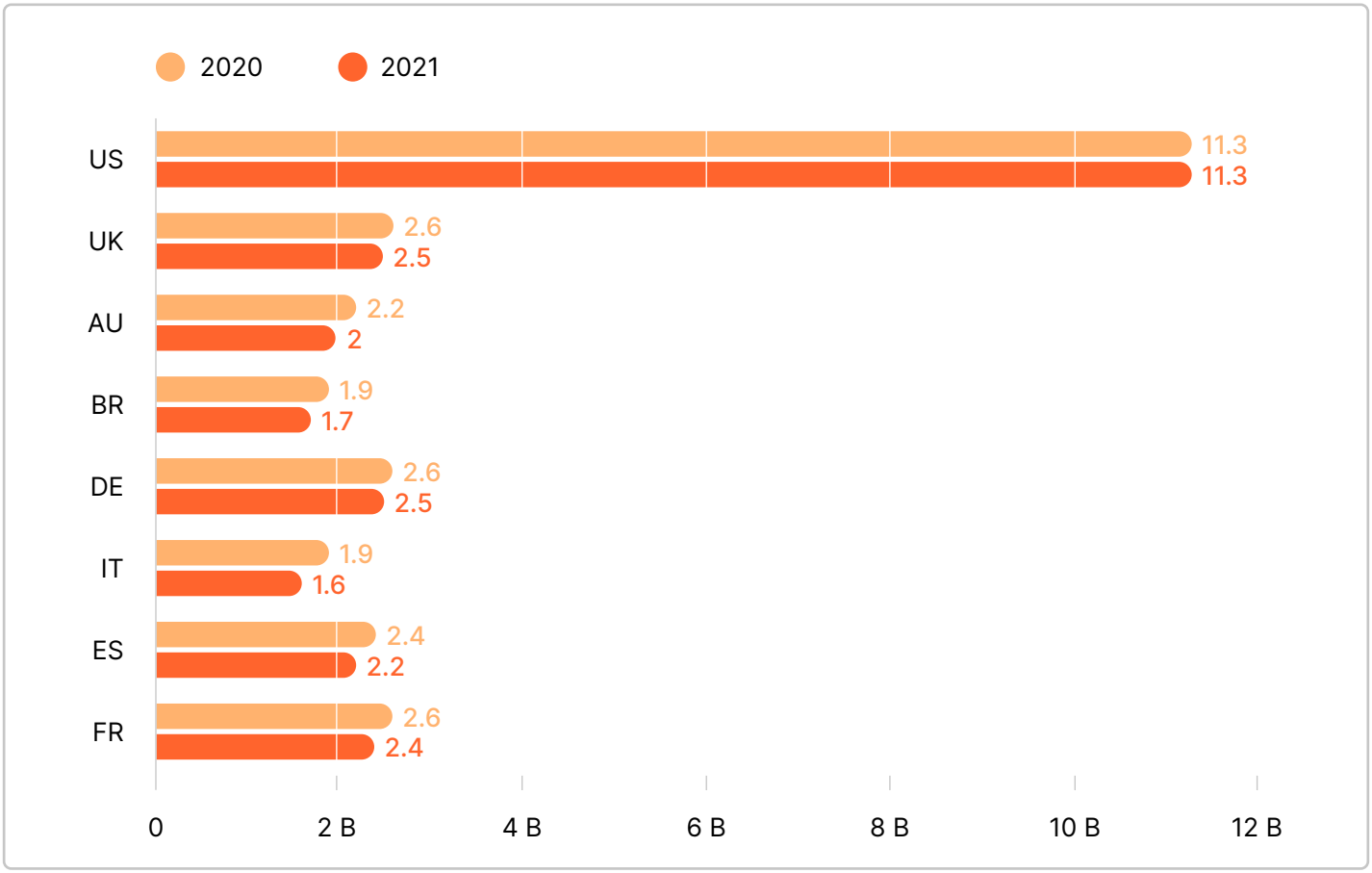
Number of Newly Ranked Domains YoY, by Region



The data show that there were, on average, 3.4M new ranking domains per market in 2021, which we can use as a proxy to help estimate new domains overall. The 24.1% increase in newly ranking domains suggests an expansion rate of circa 25% year-on-year. Of course, it's impossible to pinpoint an exact expansion rate, but this also signals a dramatic increase in the number of new sites when we compare 2020 to 2019.

The trends seen at domain level are complicated by the trends seen at page level. We studied the same eight markets, but this time looked at newly ranking URLs, not domains. Instead of seeing growth relative to 2020, we found that there were significantly fewer newly ranking URLs within the top 100, while the average drop per market was 7.4%. Overall, the data indicate that there were fewer new pages created in 2021 than there were in 2020.

Number of Newly Ranked URLs YoY, by Region



One thing to note is that the US seemed to operate on its own trajectory. Not only did it record the greatest growth in domains, but it was also the only market not to show fewer pages in 2021 than in 2020.

The most logical explanation for this is that, while more sites were created, they were built with fewer pages on average compared to the previous year.

Let's take a fictitious scenario to explain this. At the beginning of the pandemic, a brick-and-mortar retail store was forced to move all of its inventory online, so it created a new domain. The business then created a unique web page for each one of its hundreds of products. Assuming they were all optimized to the same degree, a good portion of them began to rank in the top 100 results for their relevant target keyword.

Fast-forward to a similar scenario in 2021 and another physical retail store sees the value in creating a web presence, but it takes a slightly different approach. It feels less compelled to exert the massive effort needed to move its entire inventory online, perhaps because more people are allowed back into its physical store. It opts for 10 product pages, along with a homepage and a contact page, and, thus, contributes another new domain, but fewer pages.

Of course, for some businesses, there is still a need for creating a web presence in the wake of the pandemic, but the strategies for putting that into action appear to be changing year-on-year. Let's take a look at how those behaviors translate to organic search performance, according to Semrush data.

Average Organic Traffic

There are a few ways in which we explored organic search performance:

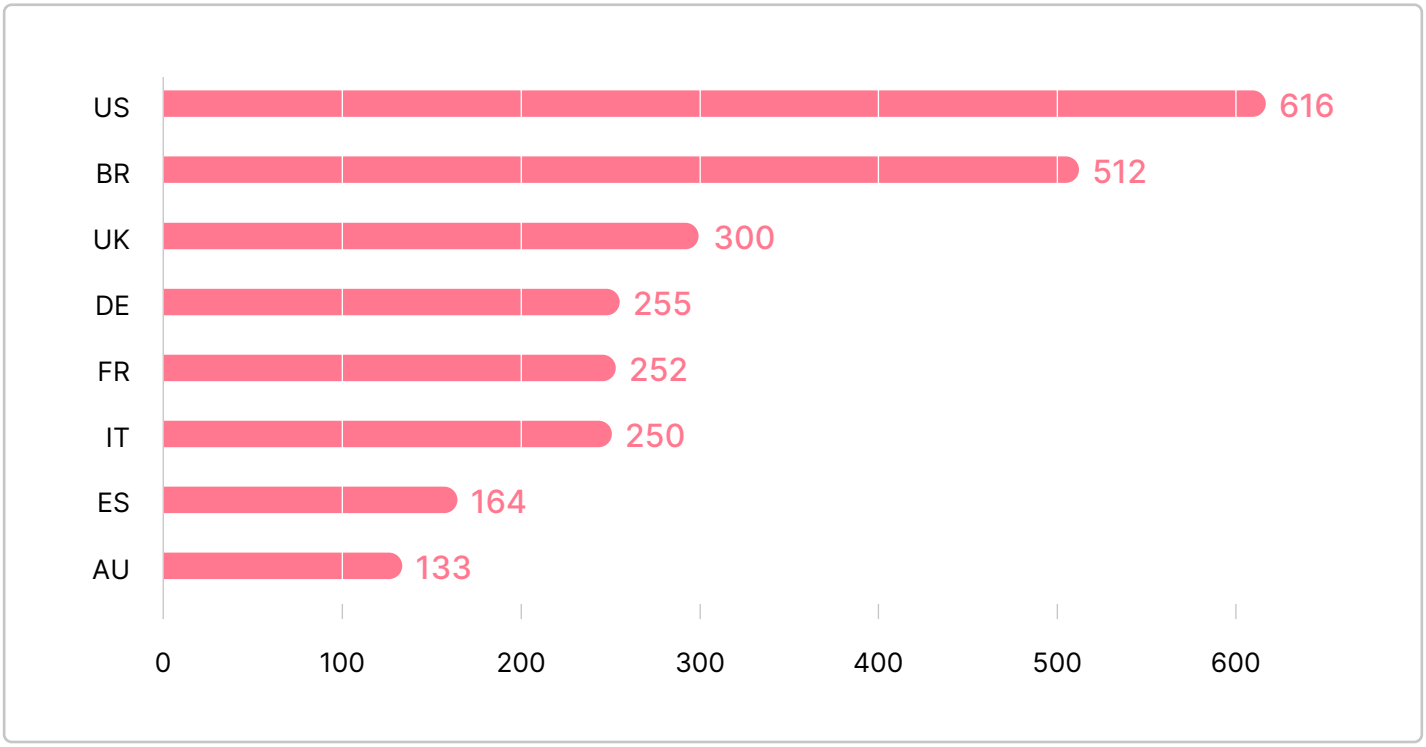
1 Average Organic Search Traffic Snapshot

We took a 30-day period in October 2021, i.e. before seasonal shopping trends began, and looked at the number of visitors the average site received, as well as the amount the average page received.

Within this snapshot period, the average site attracted 310 organic visits via desktop search across all eight markets. A better understanding can be gained by looking at each market specifically:

Average Traffic per Domain

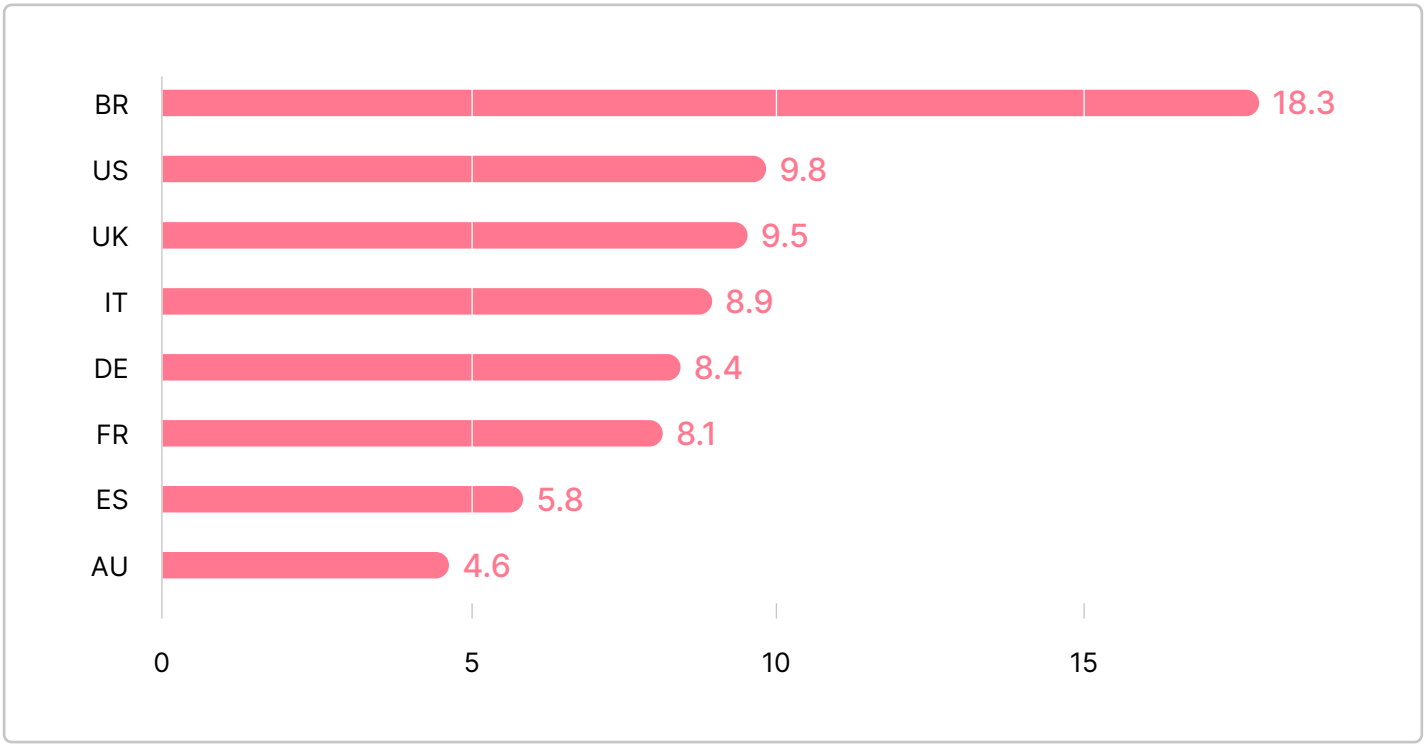
October 2021



The US, of course, led the way because of the high number of new domains there, but the traffic was evidently spread across multiple pages; the average number of visitors per URL was low across the board (on desktop):

Average Traffic per URL

October 2021



The average across all regions was 9.2 visitors per page.

2 Traffic Analysis: The Top 100K Domains

Methodology

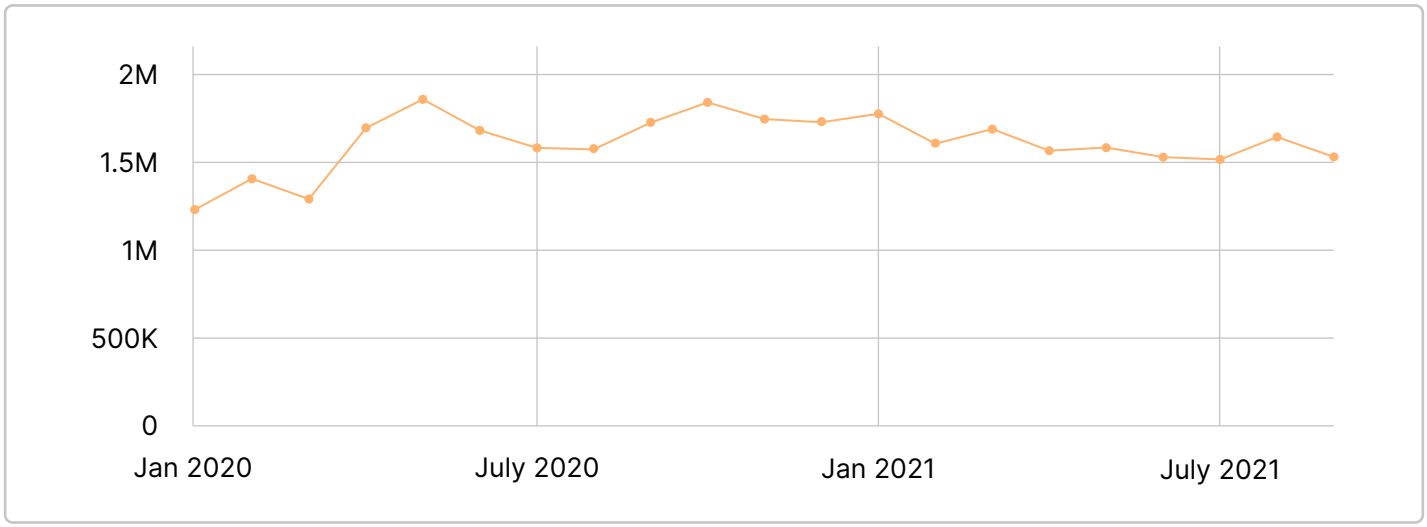
We collected the top 100K domains for each month over the period of January 2020 – September 2021 from Semrush's Traffic Analytics and calculated the average performance for each month. We aimed for two categories for each domain where possible, and then analyzed the results per category. We selected the most popular categories with large numbers of domains.

To get a better understanding of the traffic patterns for optimized sites, we looked at the figures for our database's top 100 domains in terms of total earned organic traffic.

In 2020, the top 100K sites within our data set received an average of 1.56M visits per month. In 2021, that number increased to 1.60M, which represented a 2.83% rise. This was seemingly the result of lower traffic rates in the pre-pandemic era, but COVID-19 clearly had an impact on the online environment.

Between January and March 2020, the average amount of traffic experienced by the sites analyzed was 1.30M, with a monthly high of 1.40M in February. By April 2020, the average was 1.69M visits, which suggests that the pandemic resulted in a 29% increase in traffic.

Average Visits



Another noteworthy statistic here is that the last time average traffic exceeded 1.7M monthly visits was January 2021. You can see this reflected in the downward trend in the graph.

That marked the end of a five-month run of traffic above 1.7M average monthly visits, which might have been a sign that the pandemic-related peak in web traffic had been reached.

3 Top 100K Sites Traffic: Market Share by Device

We also looked at the share of traffic by device among the top 100K domains:

	Feb - Sep 2020	Feb - Sep 2021	% Change: 2021 vs 2020
Desktop	63%	66%	4.79%
Mobile	37%	34%	-8.15%

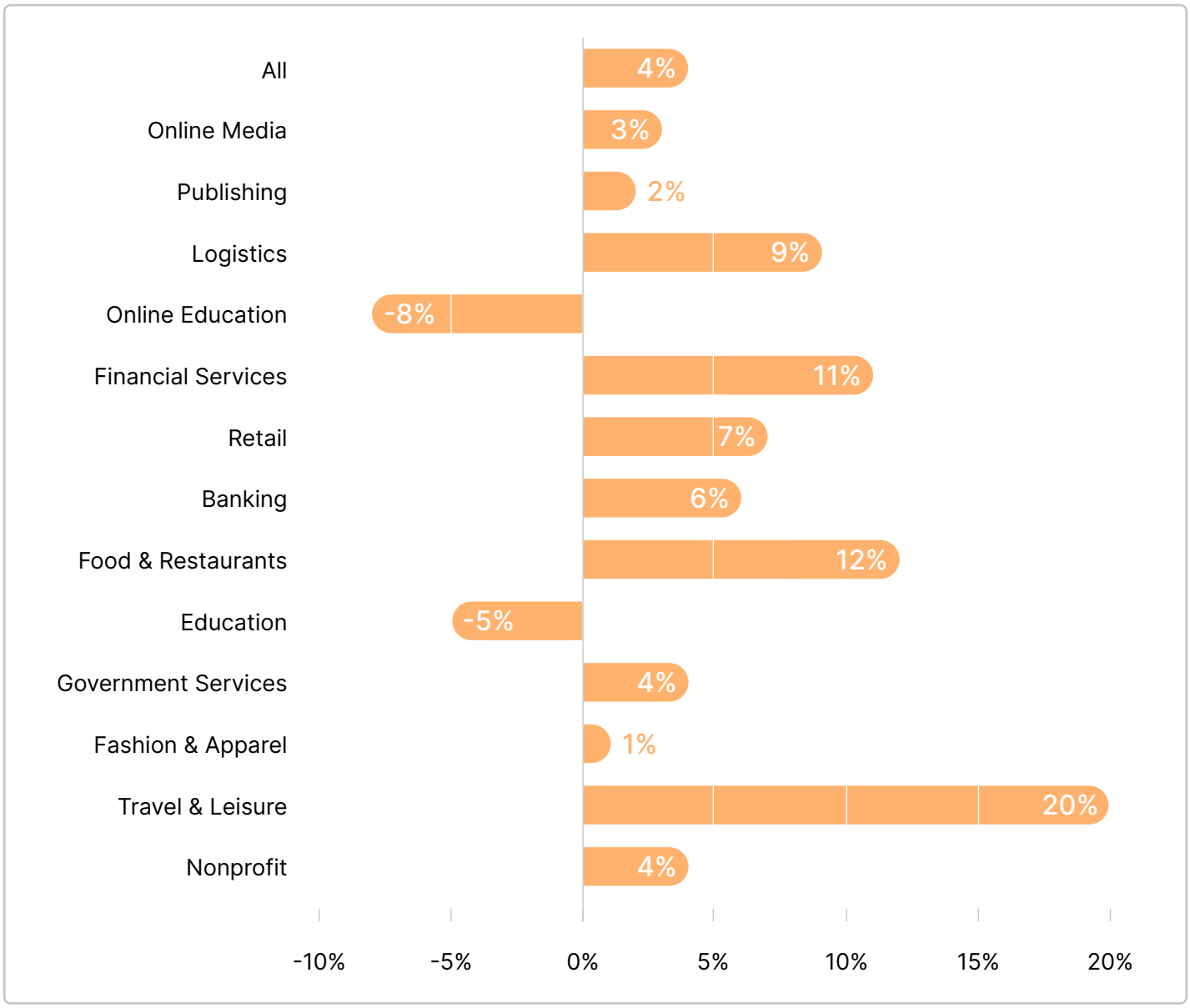
Not only was there a heavy leaning towards desktop traffic in both years, but there was also an 8% year-on-year decrease in mobile traffic.

Prior to April 2020, desktop's traffic share stood at around 60%. This jumped to almost 63% in April 2020, 65% in May 2020, and even remained at a similar level in early summer 2021, when shops, bars and restaurants began to open up again in many regions. Overall traffic levels might have changed during this time, but the traffic share by device did not, which contradicts estimates that mobile traffic accounts for around 50% of all web traffic ↗.

Qualifying the Traffic

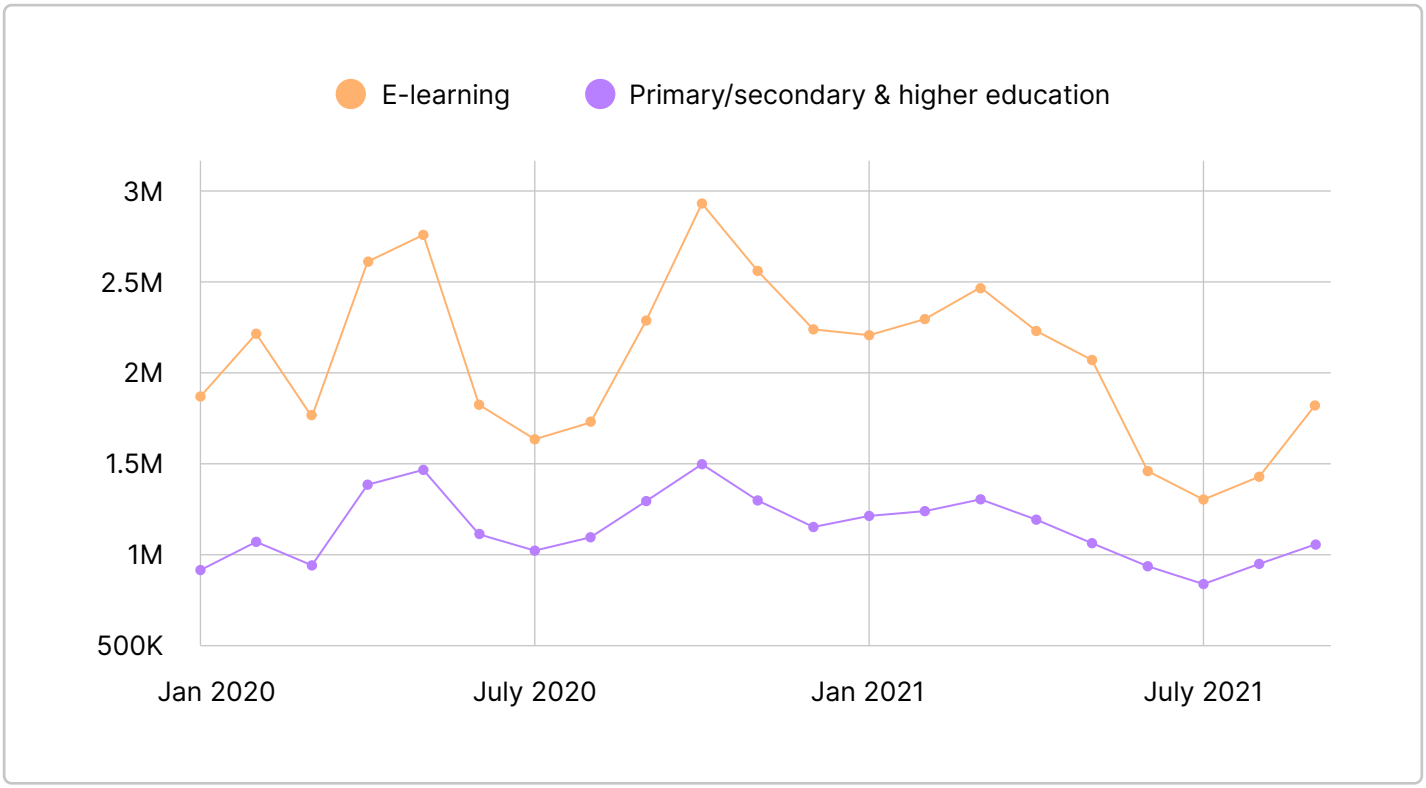
As part of our detailed analysis to understand traffic increases, we broke the top 100K sites down by industry and calculated the traffic per category, too.

2021 vs 2020 Traffic Growth by Category



All but two of the categories saw traffic improvements year-on-year, and both of those that fell were within the education industry. Schools reopening in 2021 meant lesser need for online options, so traffic naturally declined.

Average Monthly Traffic



If we track those categories side-by-side in terms of the global average, we can see the true impact on monthly visits. A significant jump in traffic in April 2020 preceded a downturn in June at the end of the school year for many, while it picked back up again at the start of the next academic year in September. By contrast, as the school year began in April 2021, that same traffic spike was significantly lower than it was the previous year, as a greater proportion of schools were open for the 2021 school year.

This again highlights how impactful the pandemic has been on a global scale, and heightens the speculation around where the digital dust will eventually settle in a "new normal" world of organic search.

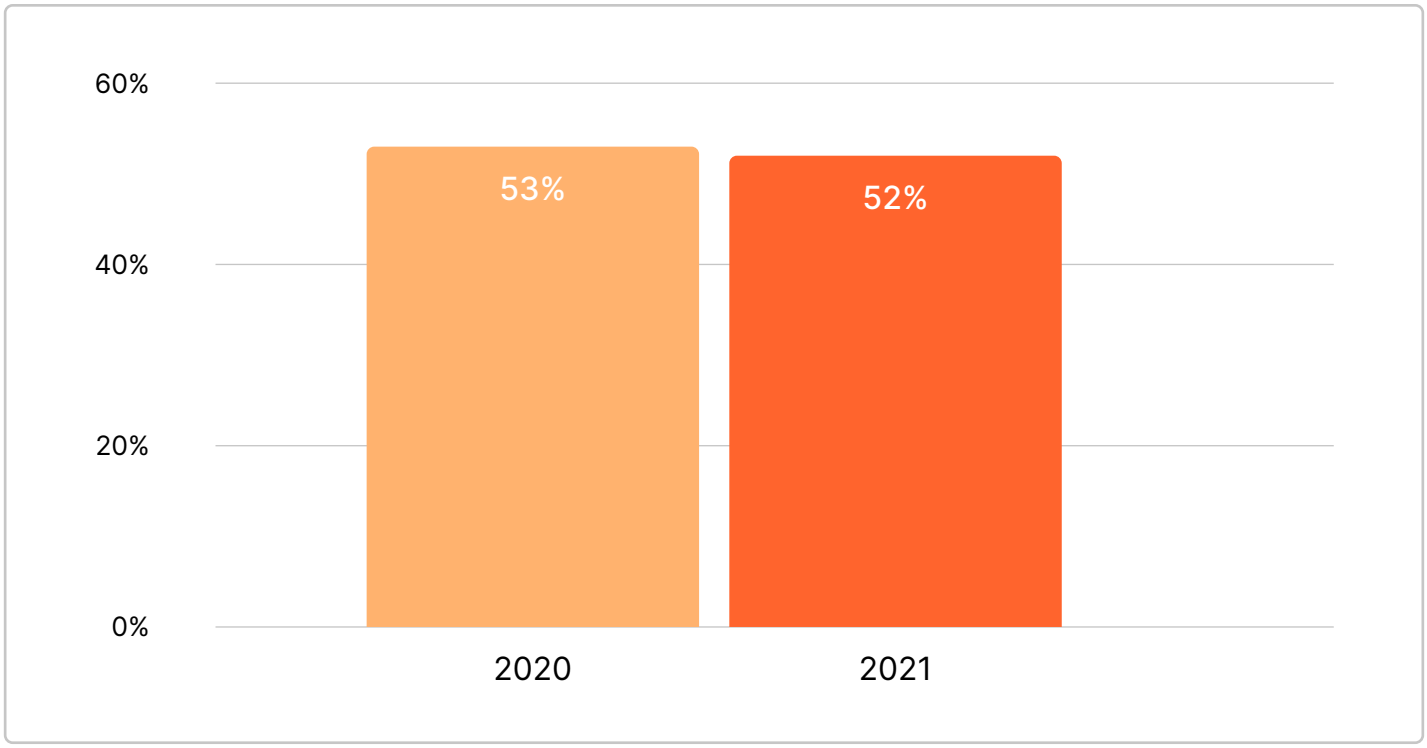
User Behavior

In order to better understand the traffic seen among the top 100K domains in the data set, we studied user behavior metrics in 2020 compared to 2021. With insights into average bounce rates, time on site and pages per visit, we get a far better sense of how user interaction with the sites changed over time.

Bounce Rate

If we take an average across the full data set, we see that bounce rate did not dramatically change year-on-year:

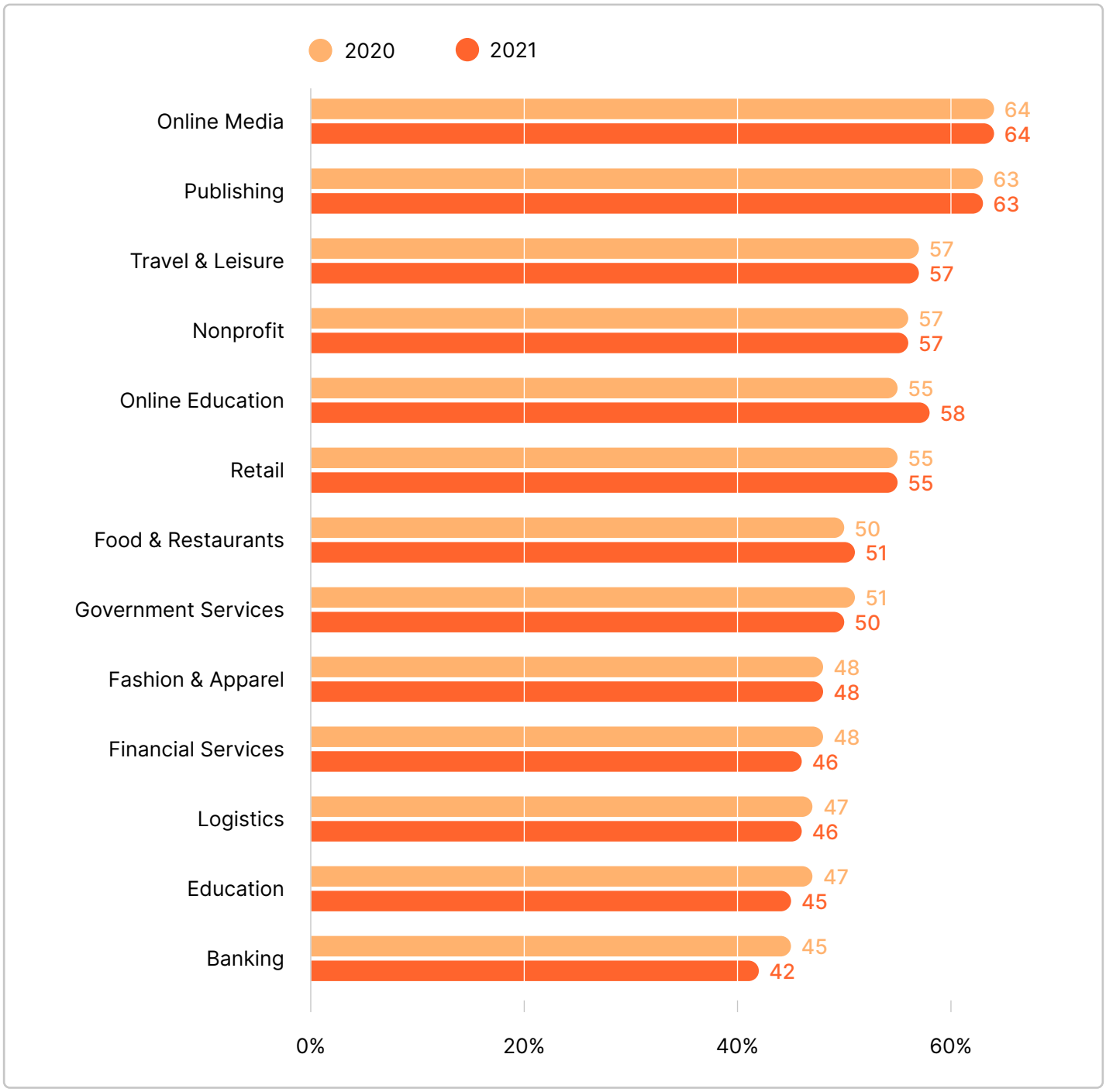
Average Bounce Rate: All Categories



As you would expect from the above, the changes seen in individual categories were not dramatic either:

Bounce Rate per Category: 2020 vs 2021

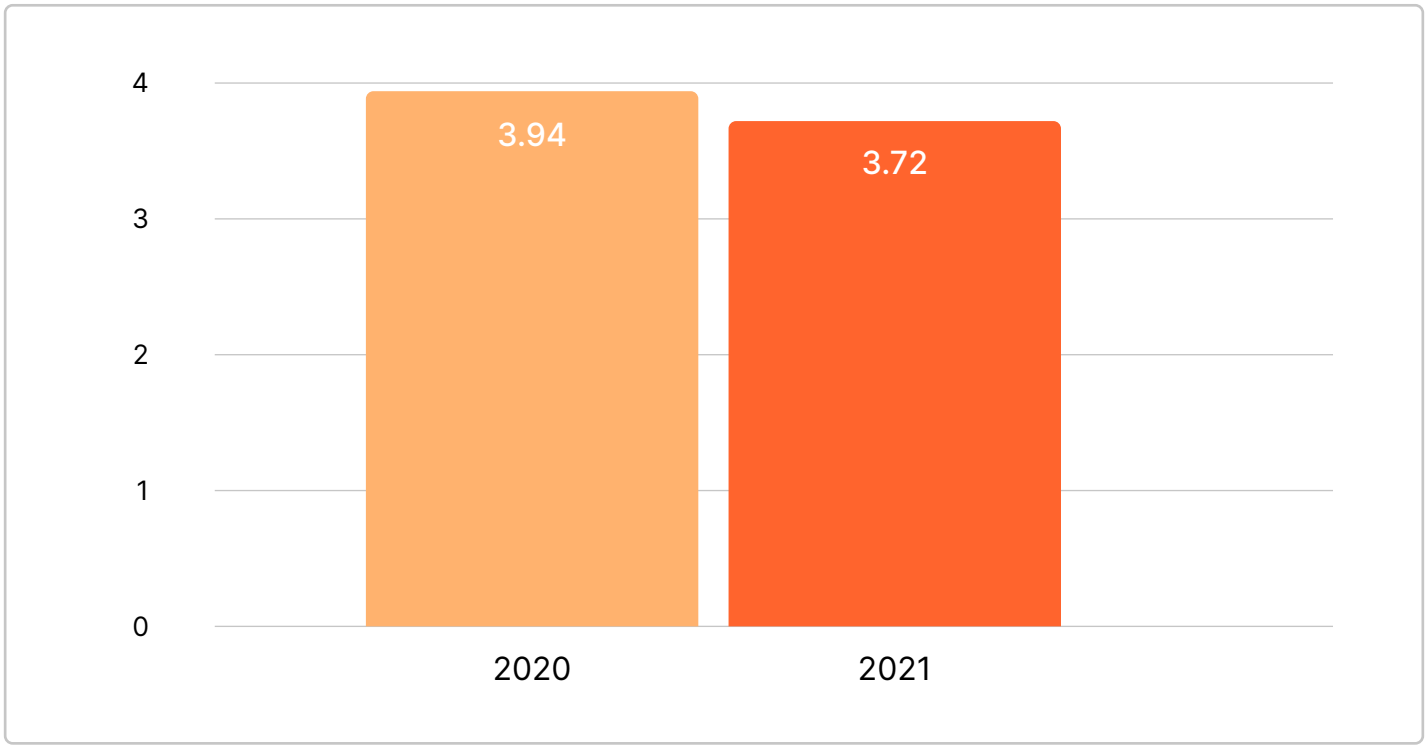
Average Over January-September



Pages per Visit

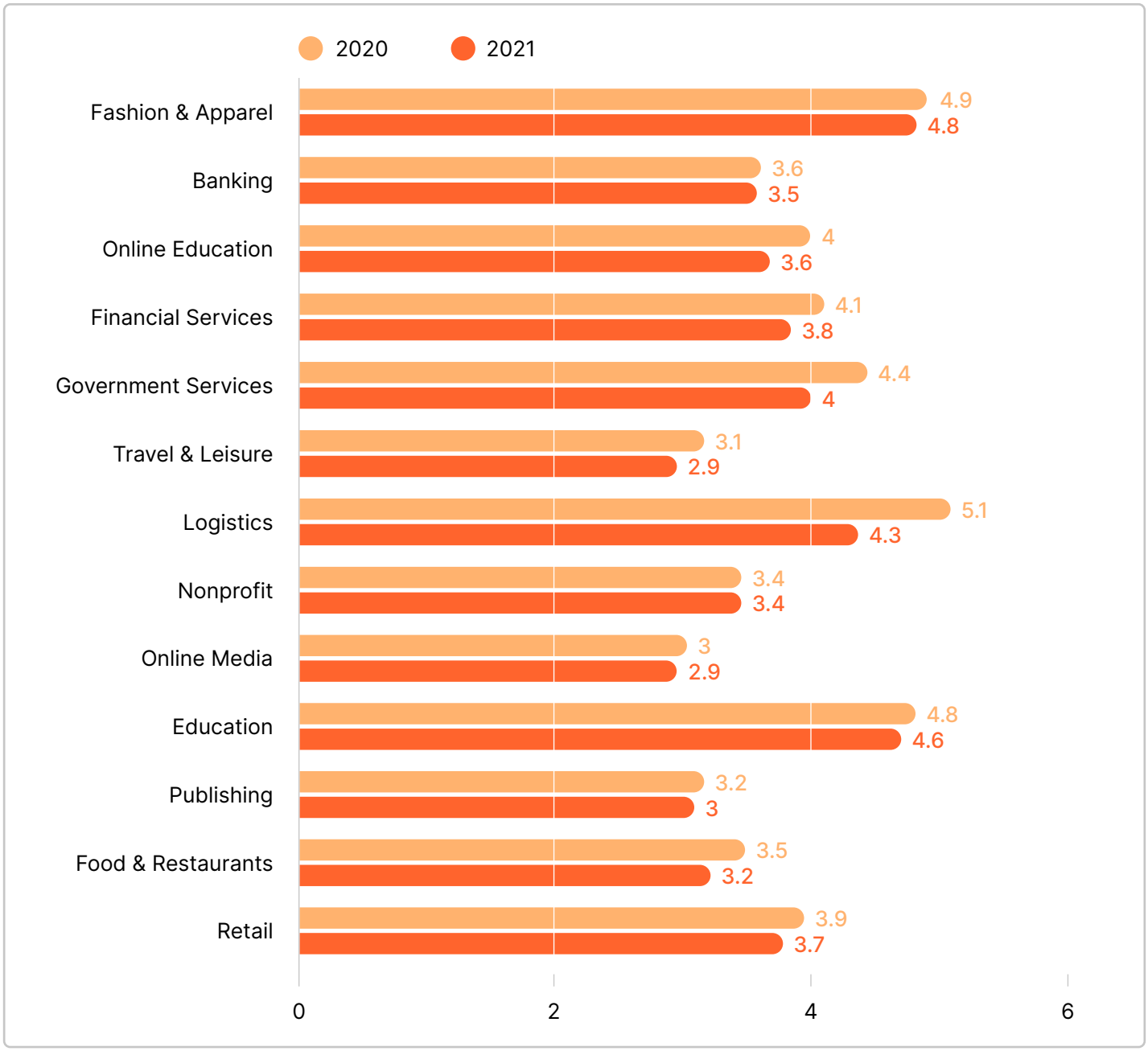
There wasn't a great amount of change in the average number of pages per visit between 2020 and 2021 either:

Average Pages per Visit: All Categories



Here, we see how bounce rates aligned with the average numbers of pages per visit for each category:

Average Bounce Rates and Pages per Visit: All Categories



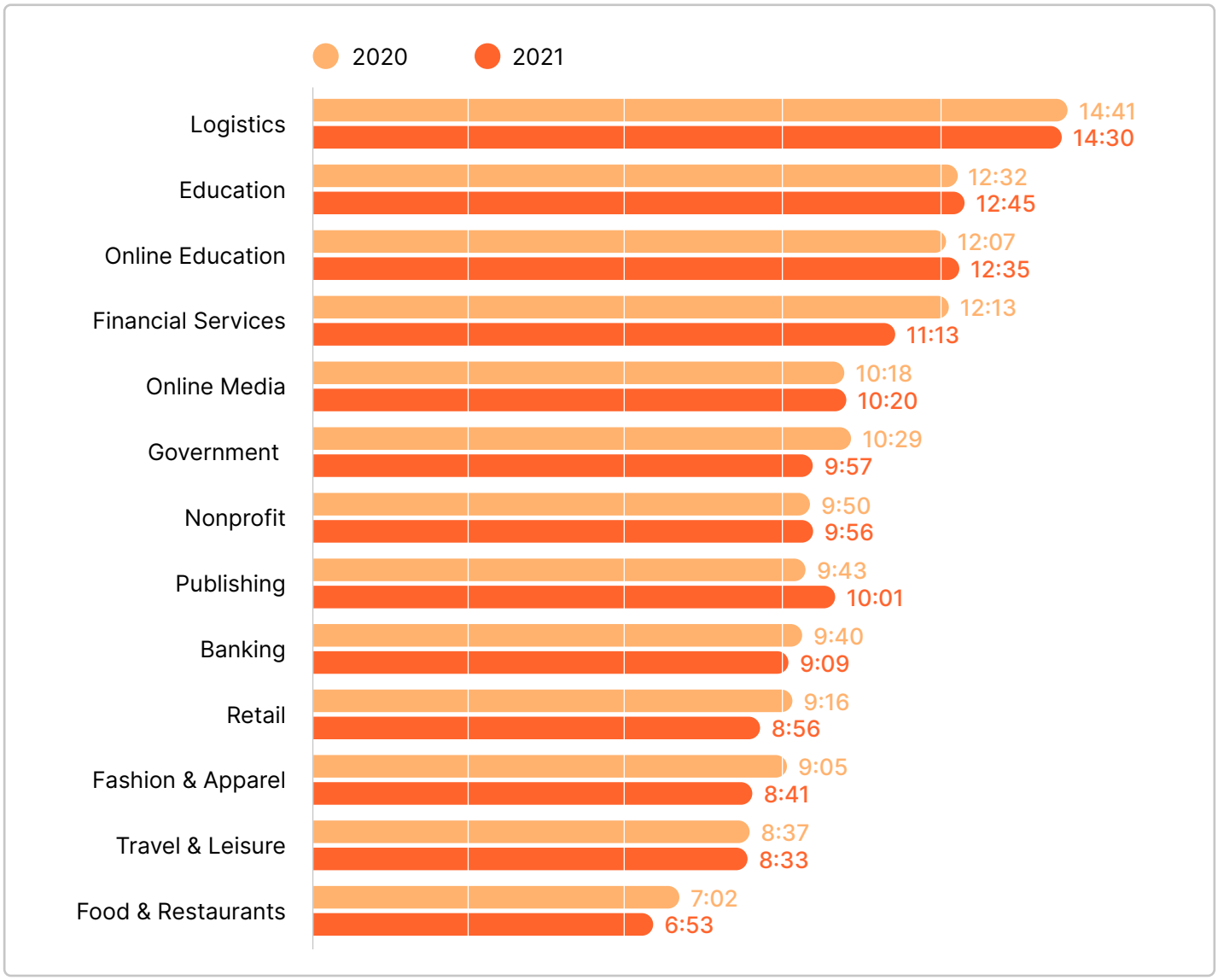
The three categories with the lowest averages for pages per visit in both years predictably experienced higher bounce rates, namely, Leisure, Online Media, and Publishing. Those with more pages per visit had bounce rates below the 60% mark, such as Apparel and Fashion, Primary/Secondary Higher Education, and Logistics and Supply.

Time Spent on Site

Year-on-year comparisons of average time on site for visitors also didn't reveal any significant change across our data set:

Average Time on Site by Category

Average Values Over January-September



With the small exception of Financial Services, which experienced a drop-off of around a minute here, users engaged in broadly the same way in 2021 and 2020 across all categories. The bottom line is that online user behaviors weren't significantly affected by the unusual circumstances of the pandemic. Some volume metrics increased, such as traffic, but the ways in which people interacted with the same sites, from bounce rates to pages per visit and time on site, were relatively unchanged.

Search Stats: What Kinds of Queries are People Running?

This section explores the search intent indicated by the types of keywords, lengths of queries, and share of search volume.

Methodology

The data below are based on Semrush Domain Analytics; we analyzed the whole database of 160M keywords and their rankings for US-based sites, plus other countries where applicable (more stats for Semrush database sizes can be found here ↬).

Keyword Intent: What Kinds of Searches Were Users Executing in 2021?

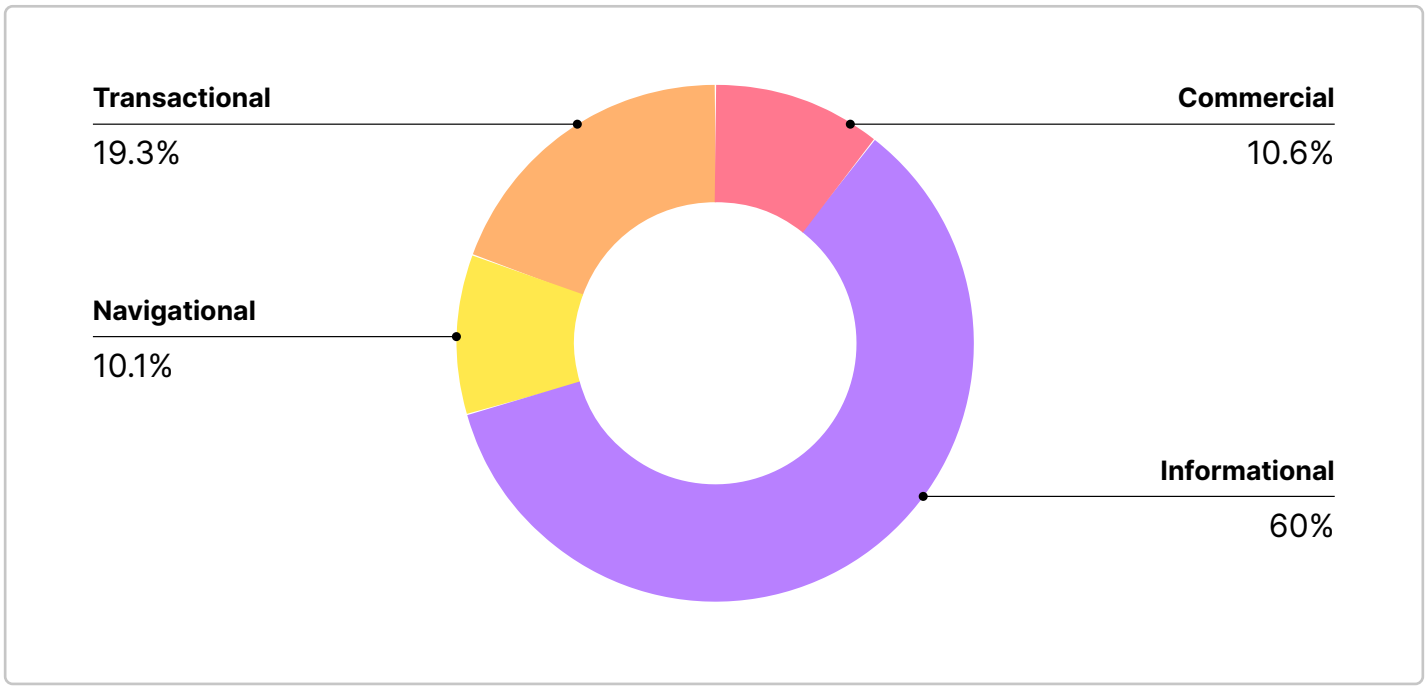
A user's intent behind any given search is a crucial factor in the success of the results they are presented with, so we broke it down into four categories to provide a better understanding of the state of search in 2021.

Specifically, these keyword categories were:

Informational
Commercial
Transactional
Navigational

While we must note that it is possible for one keyword to fall into multiple categories—"marketing books," for instance, can be both informational and transactional—we found from our desktop data set that the distribution of unique keywords by intent was broken down as follows:

Distribution of Keywords by Intent



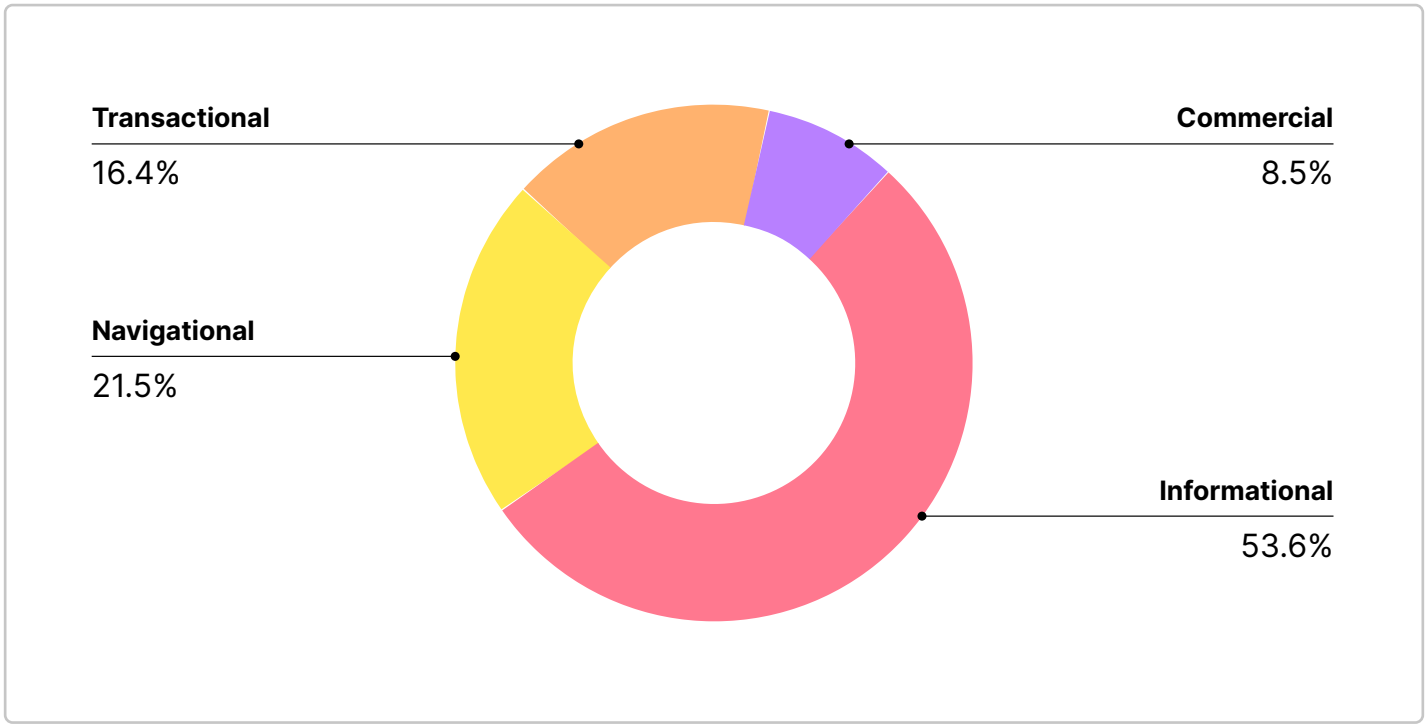
Informational queries, e.g. "coffee calories," tend to be more nuanced than most, in that the same topic or search intent can be phrased in a number of different ways to trigger specific results.

Commercial and transactional queries tend to rely on other factors without the extra details you might find in informational queries. For example, a parent may search for "pants for kids," but may be less likely to search for "blue pants for an average height 10-year-old," as they might expect to utilize the filters on a typical eCommerce page to refine the query themselves. By contrast, most informational pages don't have the filters you might find on, say, an apparel store's product category pages, so the user needs to be much more specific with often lengthier queries and more unique keywords.

The sheer number of informational keywords becomes clearer when you put the intent categories into the context of market share. Informational keywords made up 60% of the unique search terms employed by searchers. That's three times that of the next highest category, transactional searches, and six times both the unique number of commercial and navigational keywords employed by users.

While informational intent drives the most unique keywords, it doesn't intrinsically garner the greatest total search volume per intent. That said, it just so happens that informational intent searches comprised the greatest total search volume in our data set.

Distribution of Keywords' Search Volume by Intent



Despite this, they did not represent the greatest search volume per keyword. That honor went to navigational keywords.

The average navigational keyword had a search volume that is almost triple that of individual keywords in any other user intent category.

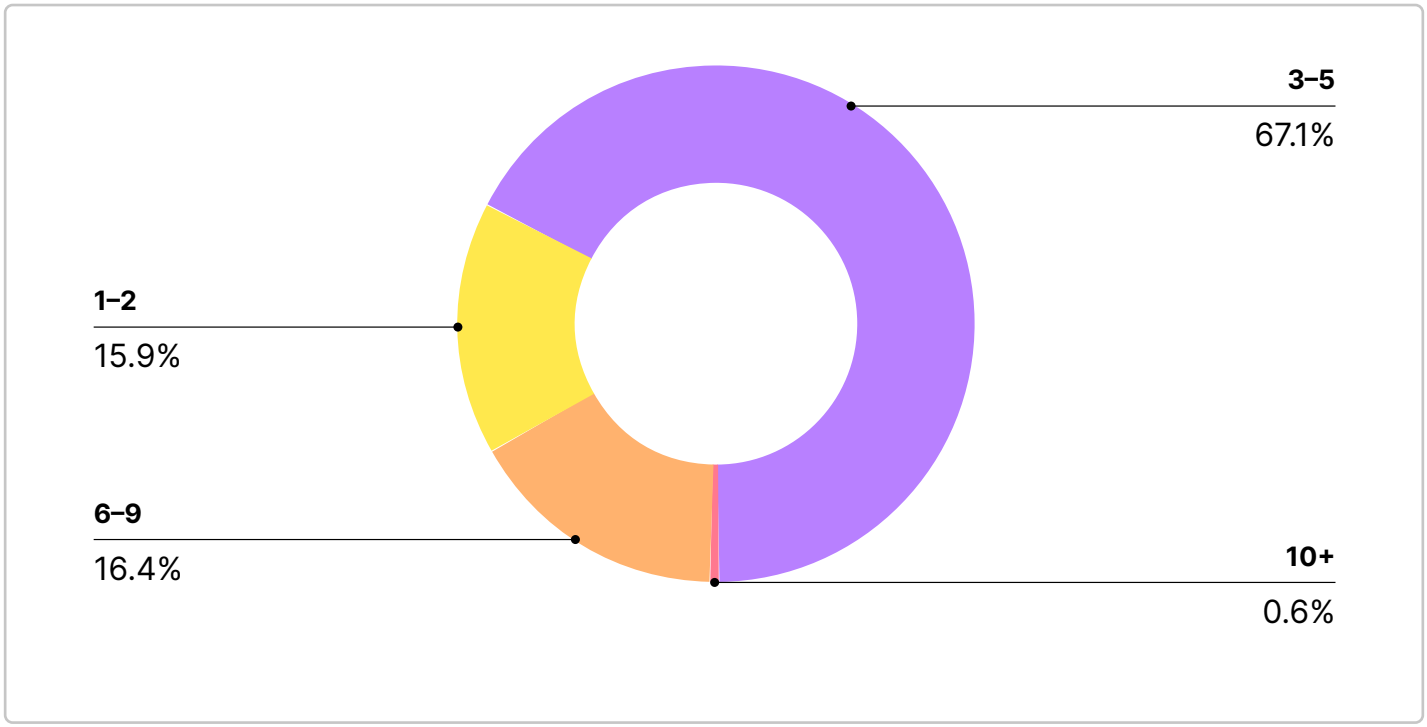
This may be because users employ specific navigational searches on a regular basis to access pages that are part of their everyday routines. Imagine a user searching for something like “bank of america log in,” for example. It’s not hard to imagine someone searching for such a query multiple times a day, if not every day.

From the point of view of search volume market share, informational keywords represented over 50% of total searches, which is indicative of the role of the web in people’s lives: to find information.

Keyword Length: How Long Were Users' Searches?

Another way to understand the types of searches people run is to analyze how specific they are with the keywords they choose. To do this, we broke down the total number of queries according to the number of words used across our data set.

Distribution of Keywords' by Length (Words)



As you can see, the overwhelming majority (83%) of unique queries contained five words or fewer, with 3-5-word queries comprising 67.1% and 1-2-word queries making up 15.9%.

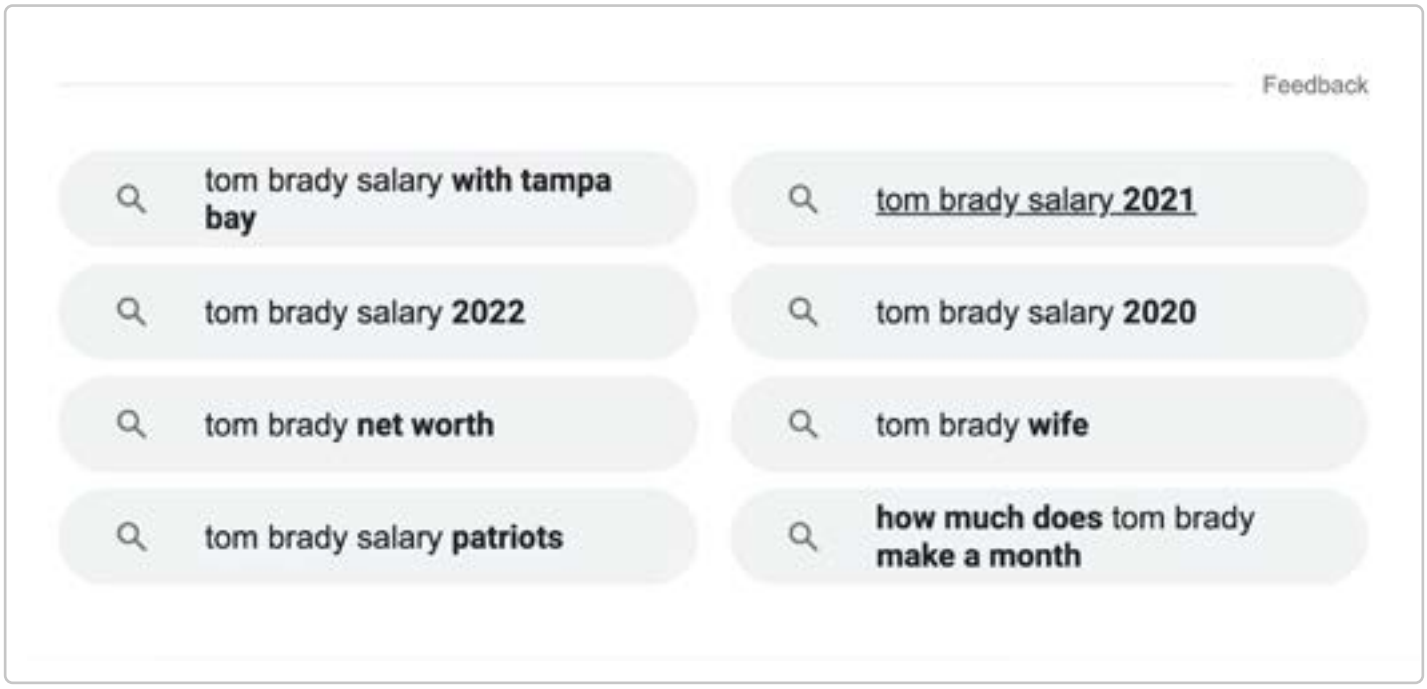
In contrast, not even 1% of queries contained 10 or more words, and fewer than 20% contained 6-9 words.

There are some nuances to take into account here, including the intentions of people who use more than one search query in one session to find what they need. For example, 1-2-word queries may simply be starting points on certain search journeys. Let's say a user searches for the word "titanic" in the first instance. While the query may reflect a top-level informational intent, as opposed to something more specific like "how can an iceberg break through the steel hull of the titanic," it may only be the first of a series of searches. It could be exploratory in nature if they're not quite sure what they are looking for, so they might follow up with more specific queries based on the search results.

Indeed, the amount of query refinement features Google has added to the SERP in recent years is indicative of this kind of behavior.

These elements include, but are not limited to:

- Top of the SERP bubble filters
- Bubble filters above SERP features like the Video Box
- The 'Refine this search' feature on mobile

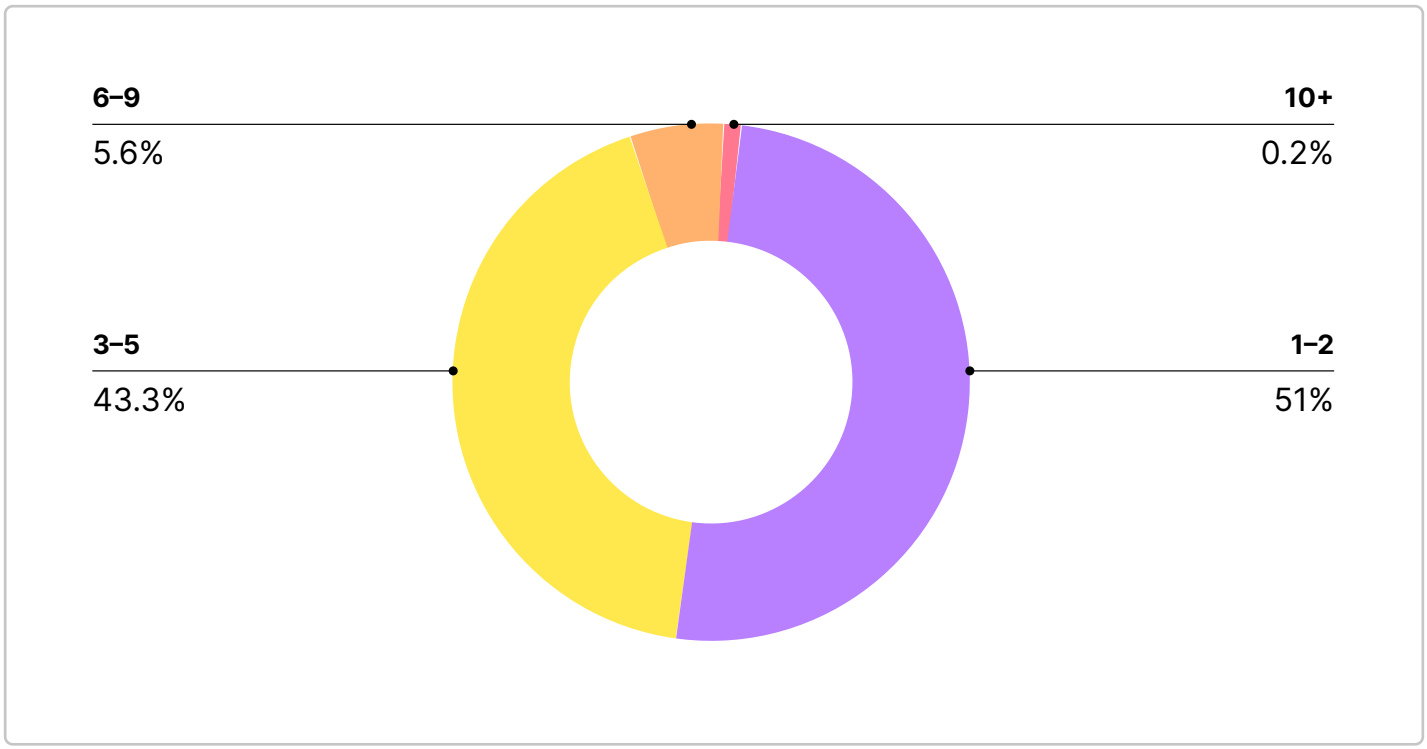


When you consider features like People Also Ask, People Also Search For, and Related Searches, too, it may suggest that people use fewer words in their initial queries because they simply no longer have to be more specific. There may be an overabundance of queries of five words or fewer because people can rely more on Google's query refinement features to help them find the information they need.

Breaking It Down by Search Volume

While queries that contained 3-5 words made up the group with the most unique keywords, they did not garner the most searches per keyword:

Distribution of Keyword Lengths by Total Search Volume



This pattern was evidenced by the number of average monthly searches per keyword per word range, too:

1 – 2	3 – 5	6 – 9	10+
923	186	98	85

The average search volume for a query 3-5 words long was only 186 searches per month, while those that contained 1-2 words had an average search volume of 923 per month. This means that there were more unique queries in the 3-5-word range, as we saw earlier, but each of them garnered fewer average monthly searches.

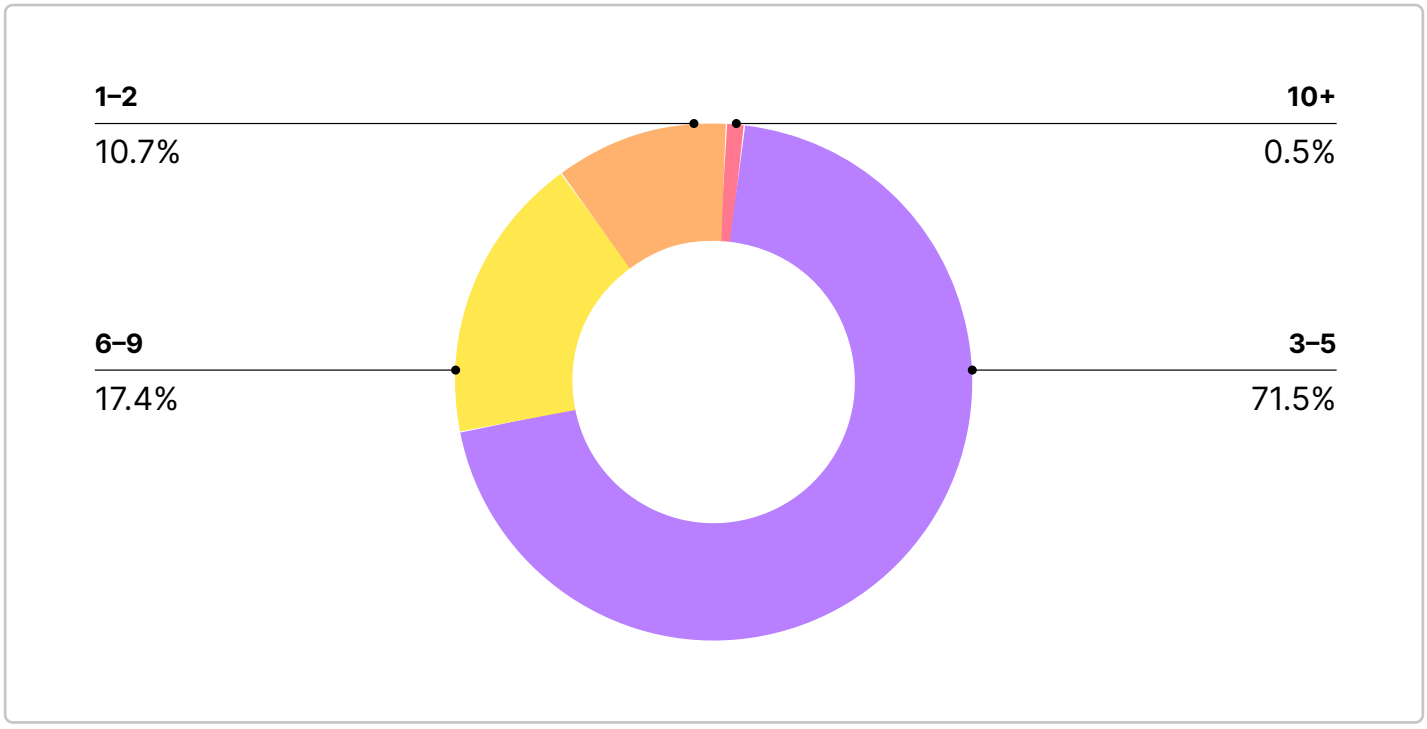
In accordance with the average number of searches per keyword length, the market share of each group showed that the number of actual searches, i.e. total search volume, was even more weighted towards queries of five words or fewer than the number of unique keywords, as detailed above.

In our data set, more than 94% of all searches contained 1-5 words, demonstrating the quantitative power of what are traditionally known as "short-tail keywords." However, this needs to be considered alongside the likelihood of such keywords generating conversions. Here, longer-tail keywords, despite being less common, tend to be highly targeted and may be more likely to convert.

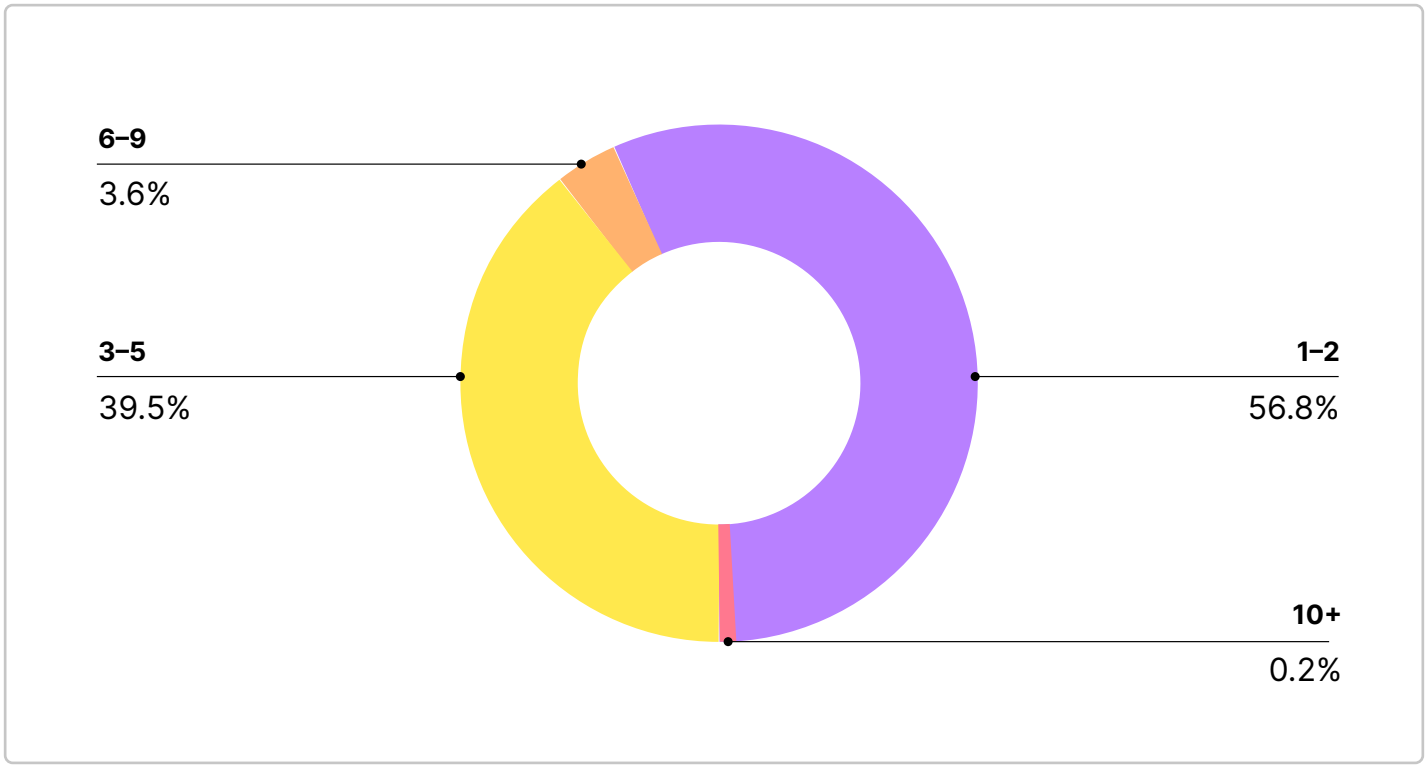
Ads & Keyword Length

While the majority (51%) of all searches in 2021 were 1-2 keywords in length, the overwhelming majority of ads shown by Google were for keywords 3-5 words long (71.5%).

Distribution of Keywords With Search Ads by Length (Words)



Distribution of Volume for Keywords With Search Ads by Length (Words)



The reason for the discrepancy comes down to the intent of searches that contain 1-2 keywords. These queries are typically broad in nature, which makes them a difficult choice for presenting ads because the chances of users clicking are obviously reduced.

State of Ranking: A Look at Google's Algorithm

This section studies trends related to the level and consistency of rank volatility in Google's search engine. There's also a focus on the Core Algorithm Updates from this perspective.

Methodology

Using data from our Semrush Sensor database, we calculated the average volatility level for each category (and overall) and compared 2021 to 2020. We also calculated some other stats, such as standard deviation, to show the year in which the data was more stable.

There are two basic stats that are important for surveying the level of rank volatility:

- Those that relate to how consistently the SERP undergoes a series of rank volatility
- Those that relate to how extreme the levels of rank volatility are in each case. For example, it can be that rank volatility happens more often, but to different degrees on different occasions

How Frequent Was Rank Volatility in 2021?

To break down the frequency of rank volatility in 2021 vs 2020, we looked at the number of days that displayed "high" or "very high" levels of volatility across both desktop and mobile.

On a scale of 1-10, high volatility is defined as a volatility level of 5-8, while very high volatility is defined as 9-10 on the Sensor index.

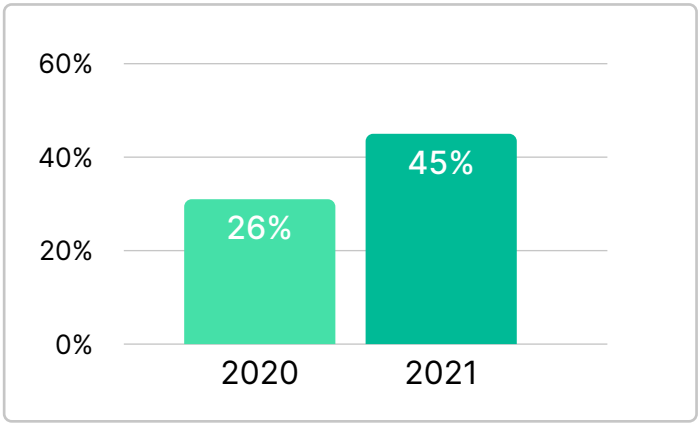
2021 Desktop Stats

- 68% increase in the number of days that presented high levels of rank volatility on desktop vs 2020
- 67% increase in the number of days that presented **either** high or very high levels of rank volatility

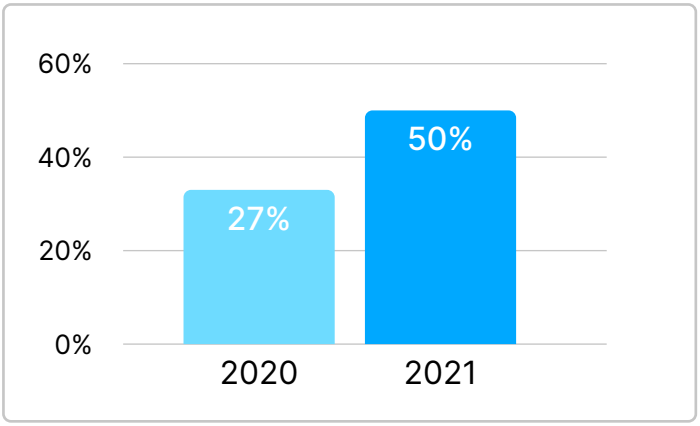
2021 Mobile Stats

- 84% increase in the number of days that presented high levels of rank volatility on mobile
- 68% increase in the number of days that presented **either** high or very high levels of rank volatility

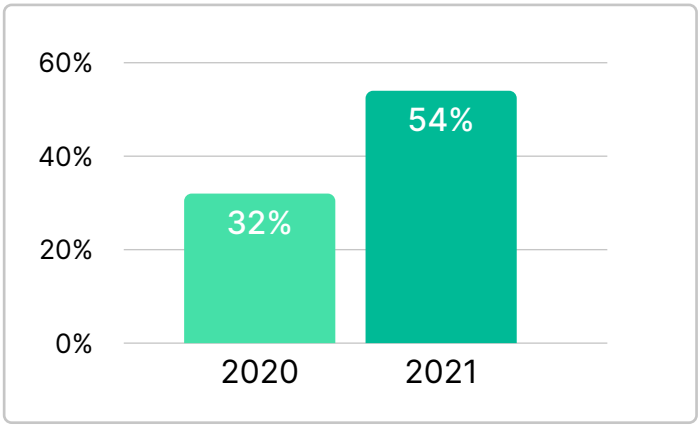
Share of High Volatility Days



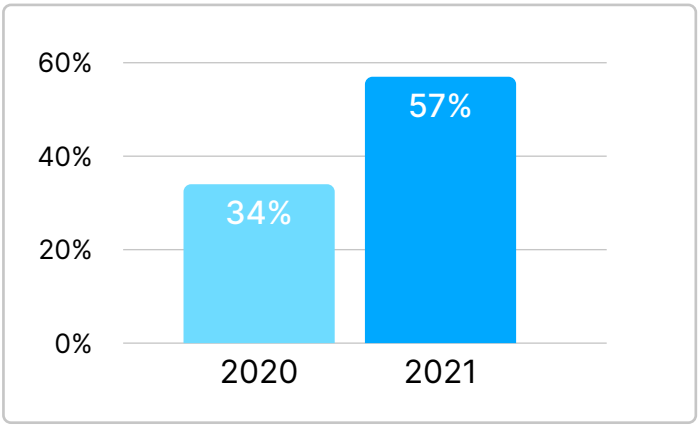
Share of High Volatility Days



Share of High and Very High Volatility Days



Share of High and Very High Volatility Days



The data show that rank volatility was a far more common occurrence in 2021 than it was in 2020. This was most notable on mobile, where the increase in days of high rank volatility digressed from the overall increase trend (with an 84% increase).

How Extreme Was Rank Volatility in 2021 Compared to 2020?

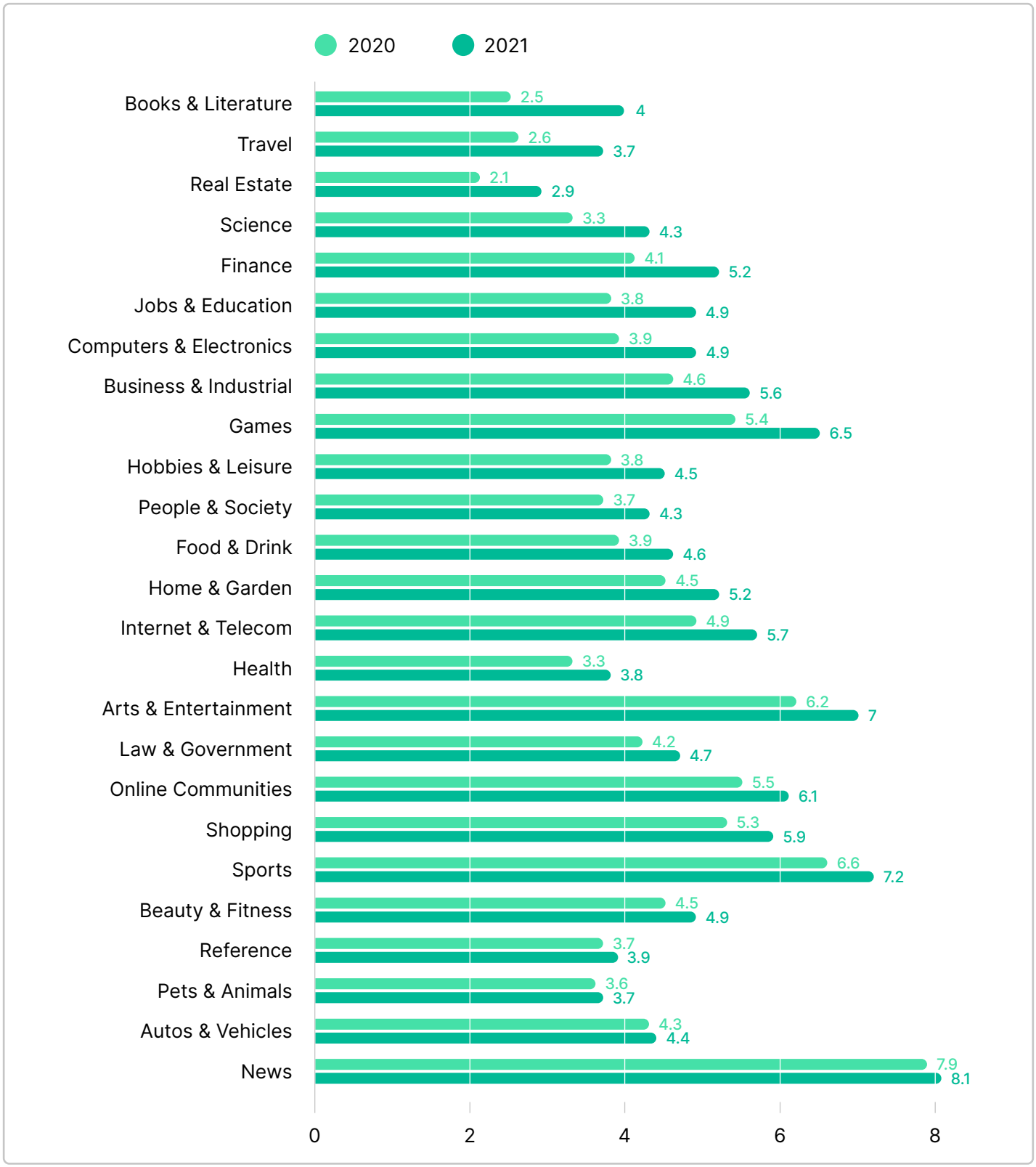
To get the full picture of rank volatility, we need to look beyond the frequency and to the severity of each case across both years.

When we assess the average annual level of volatility across all niches, we can see that higher levels occurred in 2021 than in 2020.

The average level of rank volatility increased by 16.62% on desktop and 16.66% on mobile—a pattern that was evident in every industry.

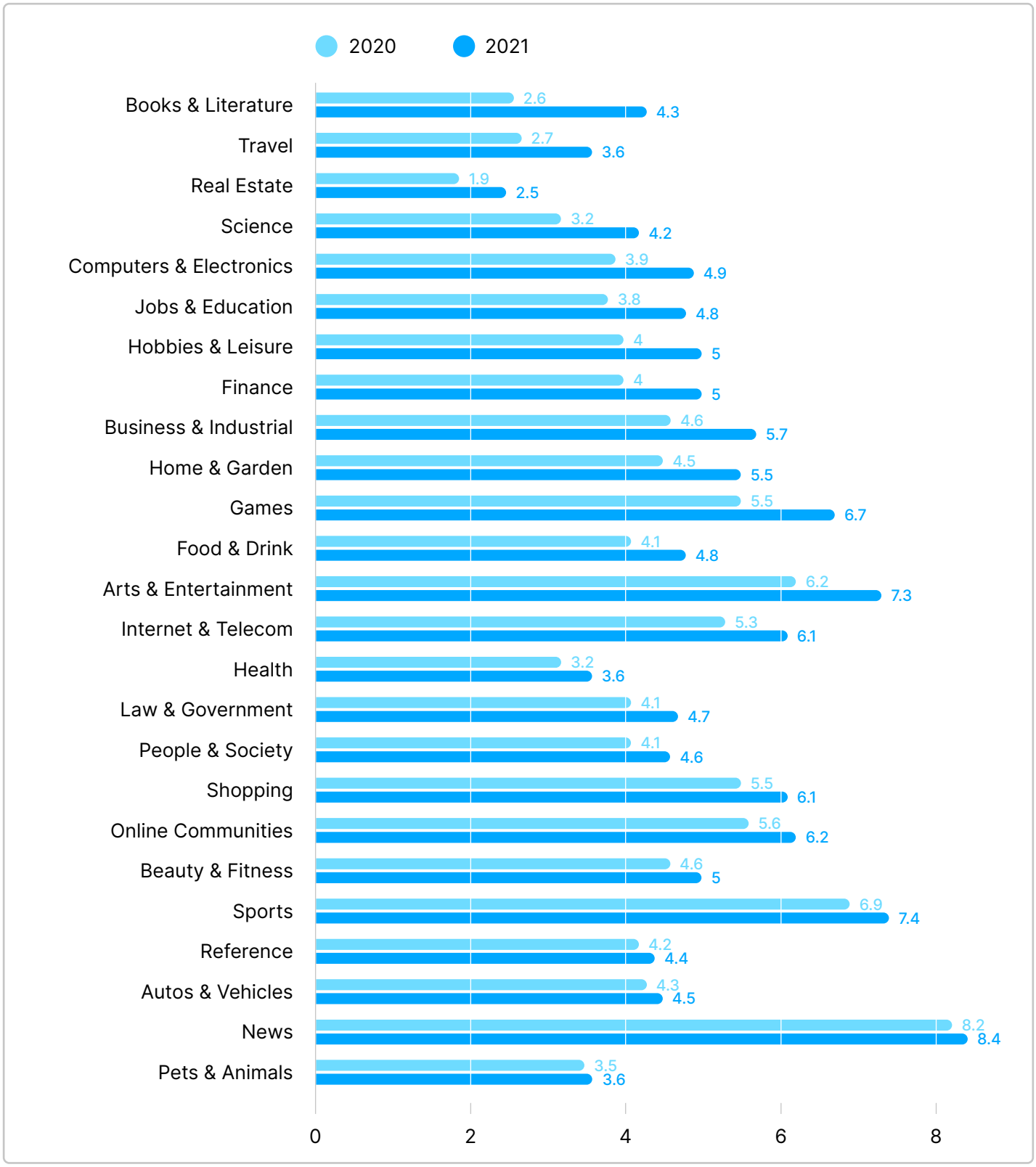
Average Volatility Level and YoY Growth

Desktop Data



Average Volatility Level and YoY Growth

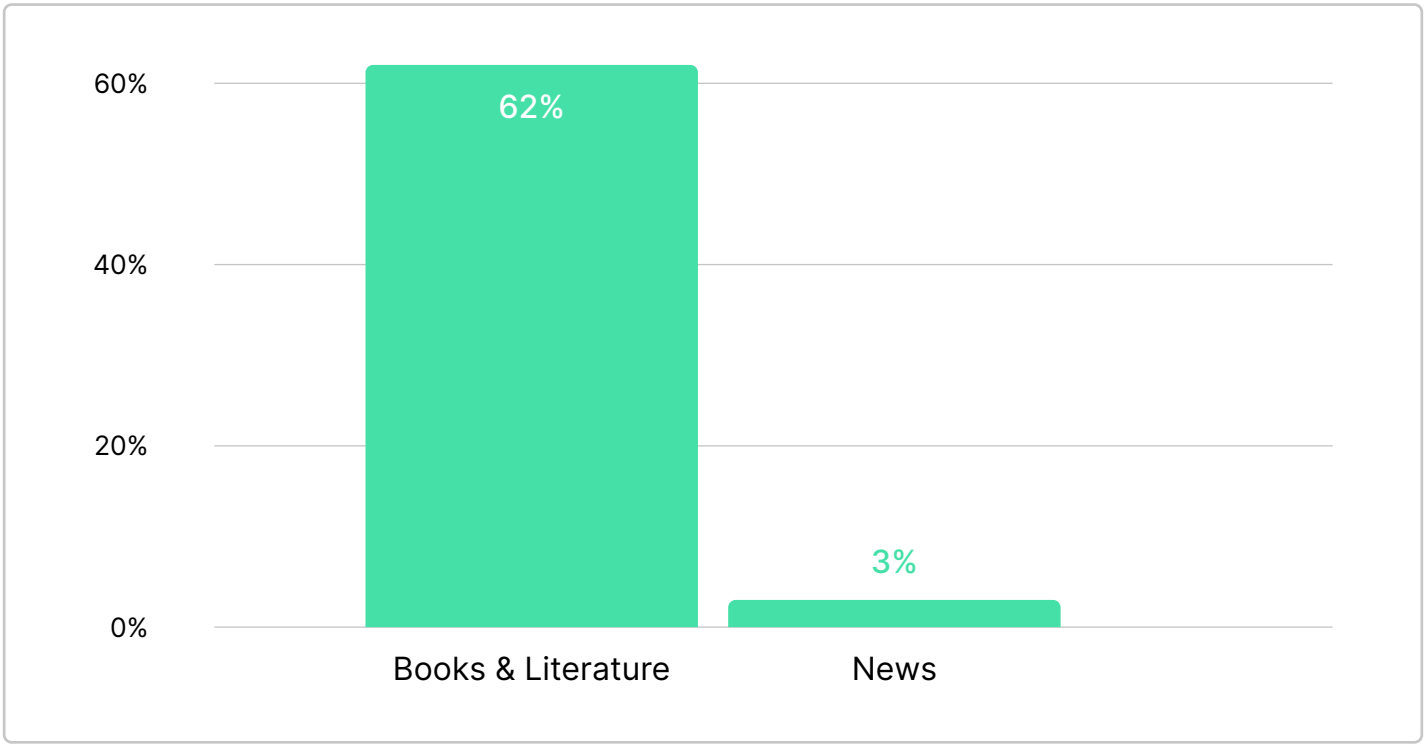
Mobile Data



The actual levels of volatility varied greatly between industries. However, there was consistency across the devices, with Books & Literature, Travel, and Real Estate being the most volatile on both mobile and desktop. Similarly, Pets & Animals, Autos & Vehicles, and News were the least volatile industries across both devices.

Average Volatility Growth From 2020 to 2021

Desktop Data



The differences in average volatility levels between industries were extreme in some cases, with Books & Literature showing a 61.6% increase and, yet, News experiencing a 3.48% increase on desktop in 2021.

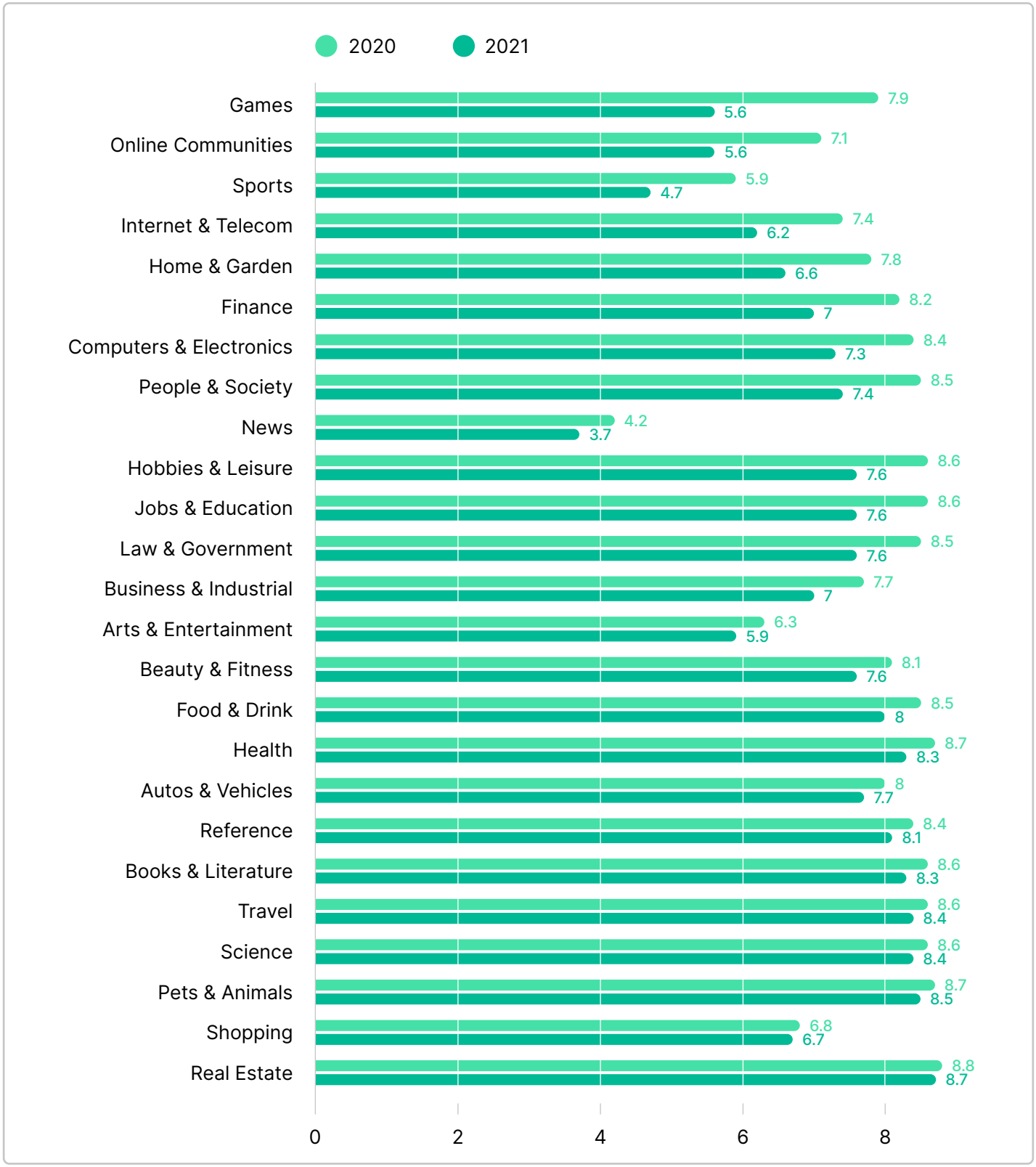
Volatility Reached Higher Maximum Levels in 2020

It is not enough to merely look at the average volatility level to determine whether rank volatility has or has not gotten more extreme. The average can be skewed by unusual periods of extended volatility at a high or very high level.

When we dig a bit deeper, we see the extent of volatility is not as clear cut because the base levels of volatility are so susceptible to change. The average maximum volatility score actually decreased in 2021 by 2.25% on both desktop and mobile, and all industry peaks in each year were lower, too.

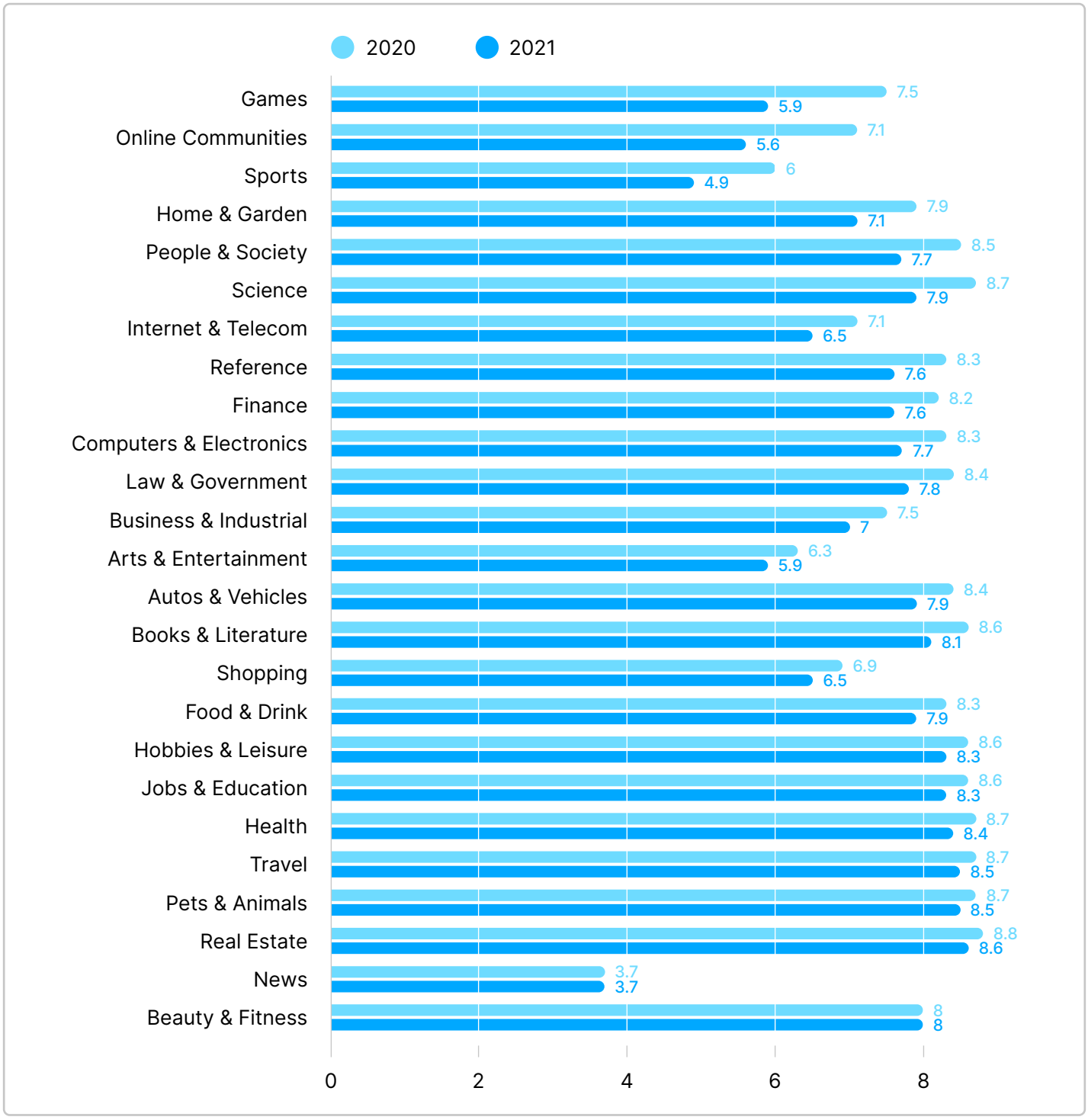
Difference Between Max and Min Score Each Year

Desktop Data



Difference Between Max and Min Score Each Year

Mobile Data



On both desktop and mobile, the Games industry saw the most drastic decrease in the maximum level of volatility; it fell by over 20% on both desktop and mobile.

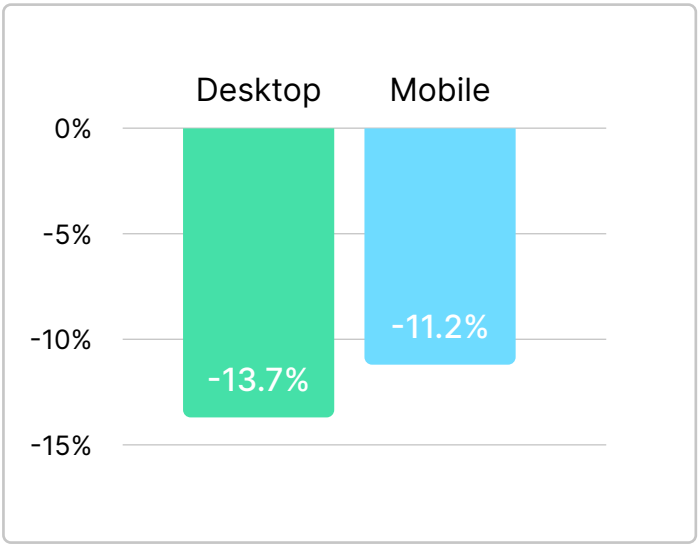
Standard Deviation Decreases in 2021

Perhaps the most telling metric is the standard deviation of rank volatility expressed in 2021. This indicates how extreme the levels of volatility were relative to the average. While we saw that the average level of rank volatility was higher in 2021, the deviations from that average were far lower. This means extreme spikes relative to the overall volatility levels were less common.

By device, rank volatility deviation decreased by:

↓ 13.7% on desktop
↓ 11.2% on mobile

Rank Volatility Deviation YoY Growth

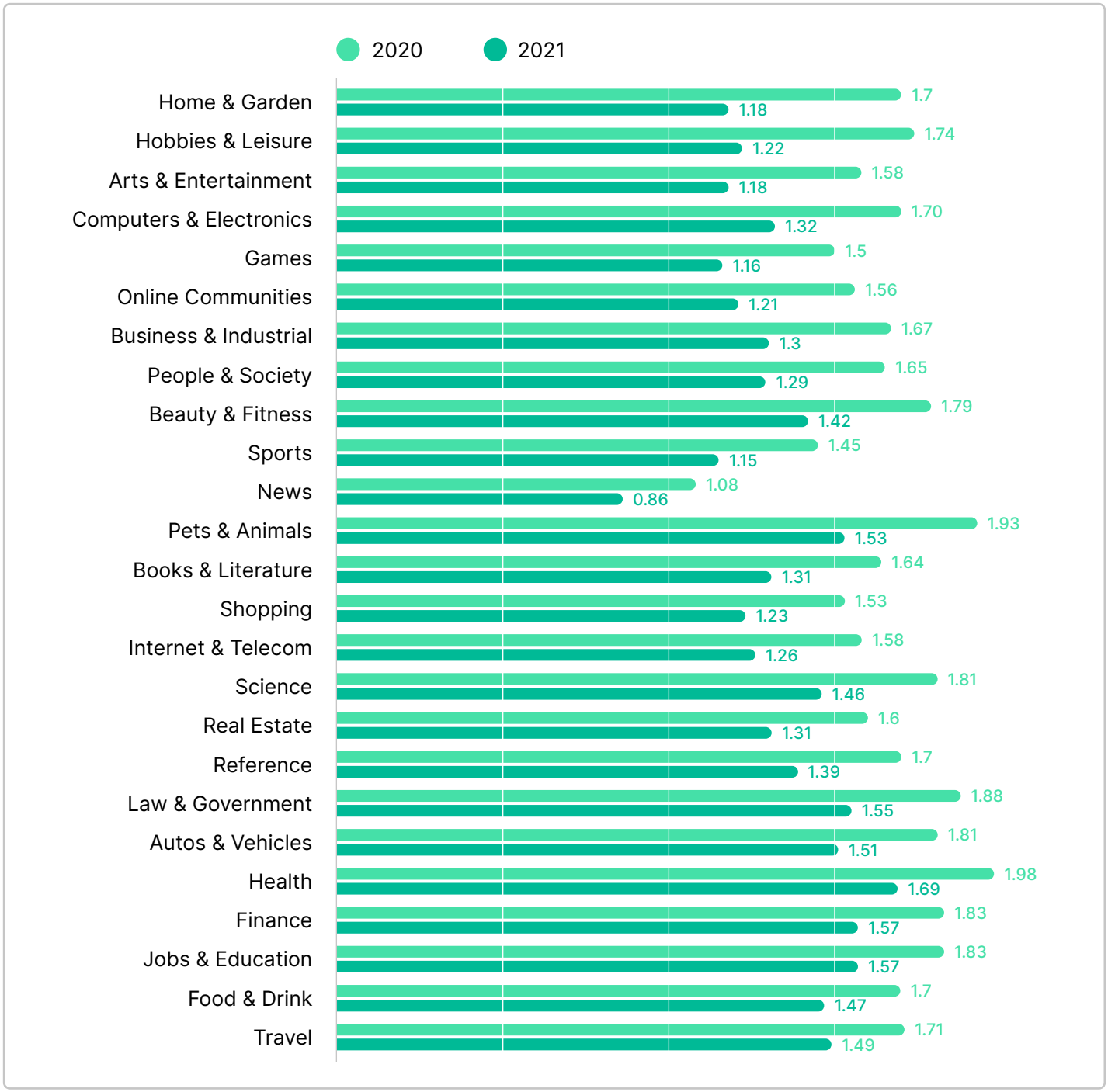


The volatility swings, then, were less extreme in 2021 than they were in 2020.

There was extreme variance between industries, while every niche except Food & Drink on mobile displayed a decrease in deviation. On desktop, Home & Garden, Hobbies & Leisure, and Art & Entertainment saw the most drastic decreases in deviation at 25% or more. Conversely, a slew of industries saw a deviation decrease of under 15%, including both Health and Finance.

Standard Deviation for Each Category

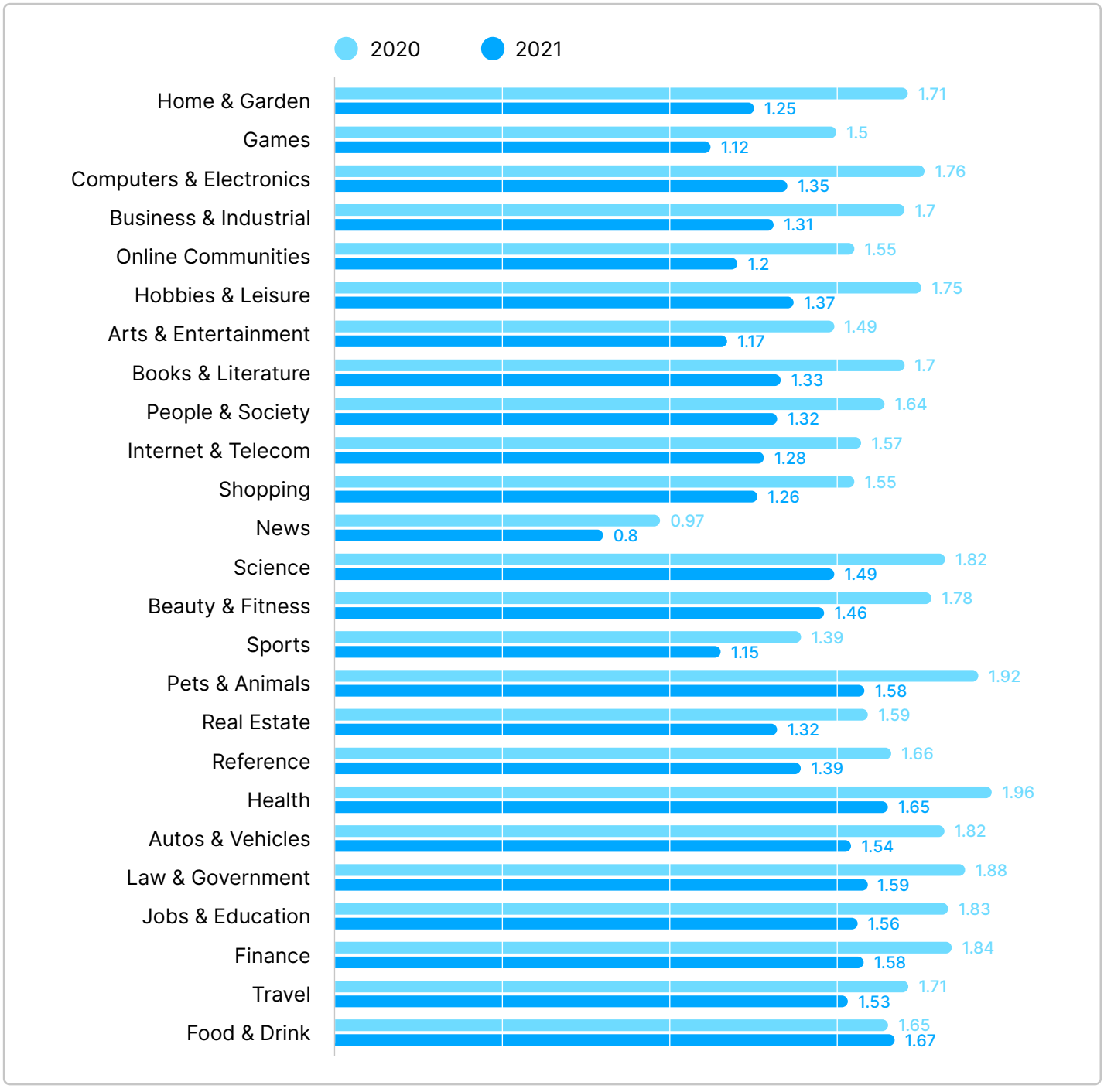
Desktop Data



While there was consistency across devices regarding the average rank volatility metric, there was a divergence on mobile in the industries with the most drastic numbers. Home & Garden, Games, and Computers & Electronics decreased, but they were not in the top three on desktop. That said, though, the levels of deviation decrease were broadly similar across both devices.

Standard Deviation for Each Category

Mobile Data



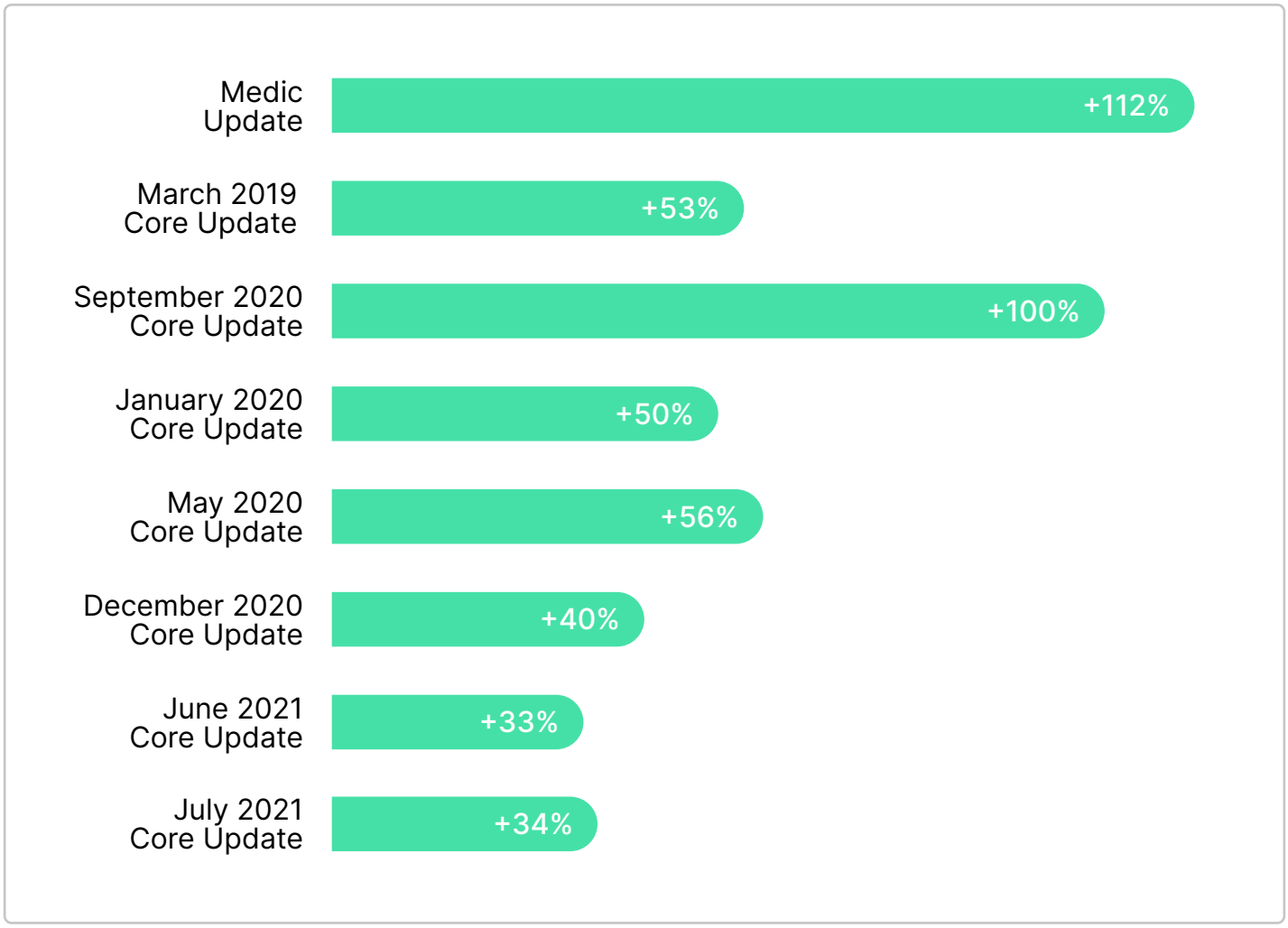
Takeaway

While the baseline levels of "everyday" volatility were higher in 2021, the deviations from that baseline were not as extreme. So, higher peaks won't necessarily mean greater instability because one may now expect higher average levels of volatility than in previous years.

The Core Updates in 2021

No analysis of algorithm volatility is complete without a look at the Core Algorithm Updates, of which there were two in the summer of 2021.

Core Update Rank Volatility



If we zoom out to take historic updates into account, we notice a trend towards decreasing rank volatility as a result of the core updates from December 2020 onwards. Since then, the overall increase in volatility caused by the core updates has consistently been less than 50%. The two updates in 2021 caused volatility increases of less than 35%.

State of Search: SERP Features & Beyond

This section looks at the construction of the SERP, specifically the prevalence of the various features contained on it on both desktop and mobile.

Methodology

The data below are based on Semrush Domain Analytics; we analyzed the whole database of domain rankings for 160M keywords for US-based SERPs, plus other countries where applicable (more stats for Semrush database sizes can be found here ↬).

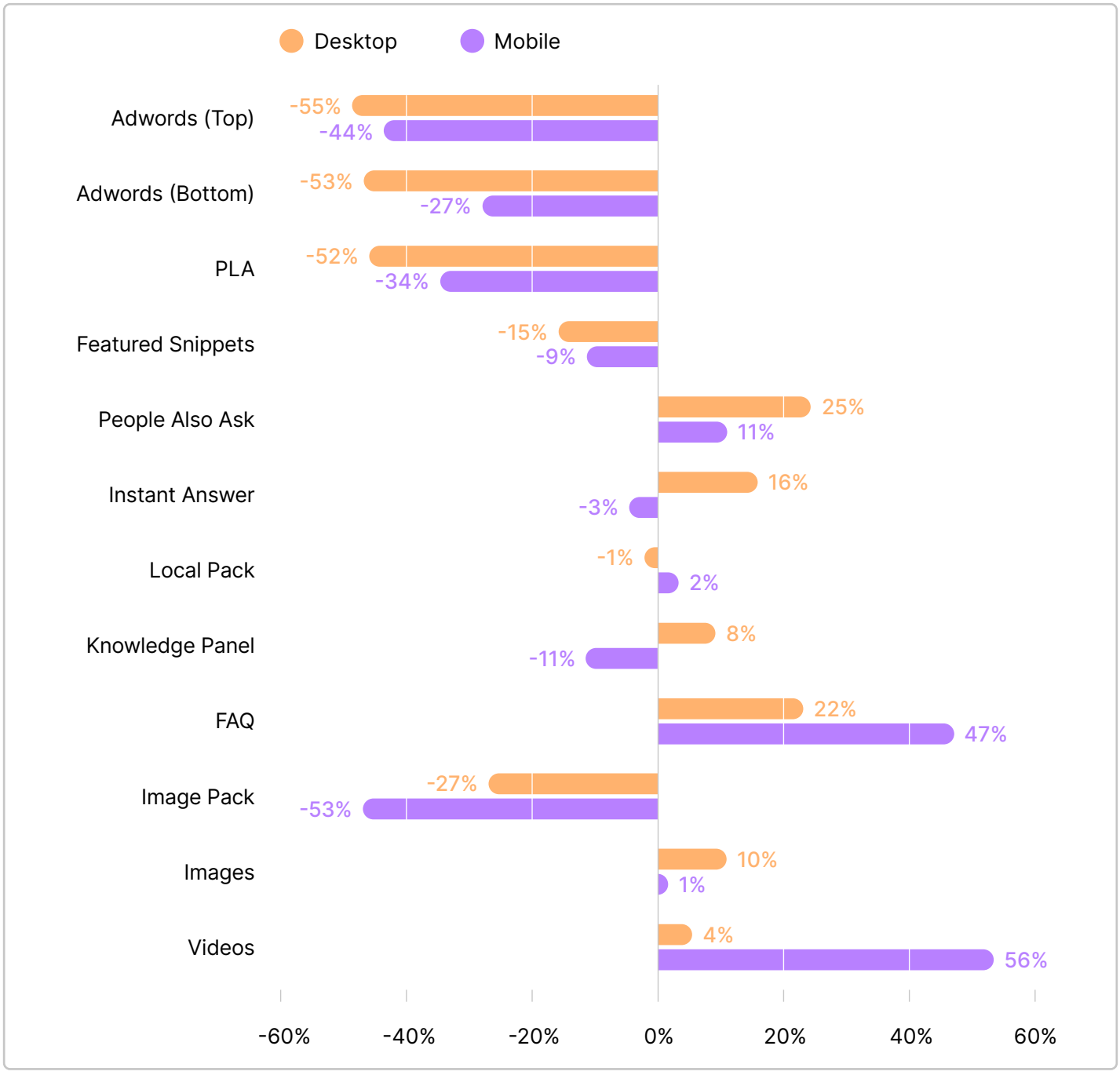
SERP Features

In this section, we explore the patterns displayed by a range of SERP features on both desktop and mobile in 2021 vs 2020.

The following data points depict the changes in frequency of those SERP features across our keyword set:

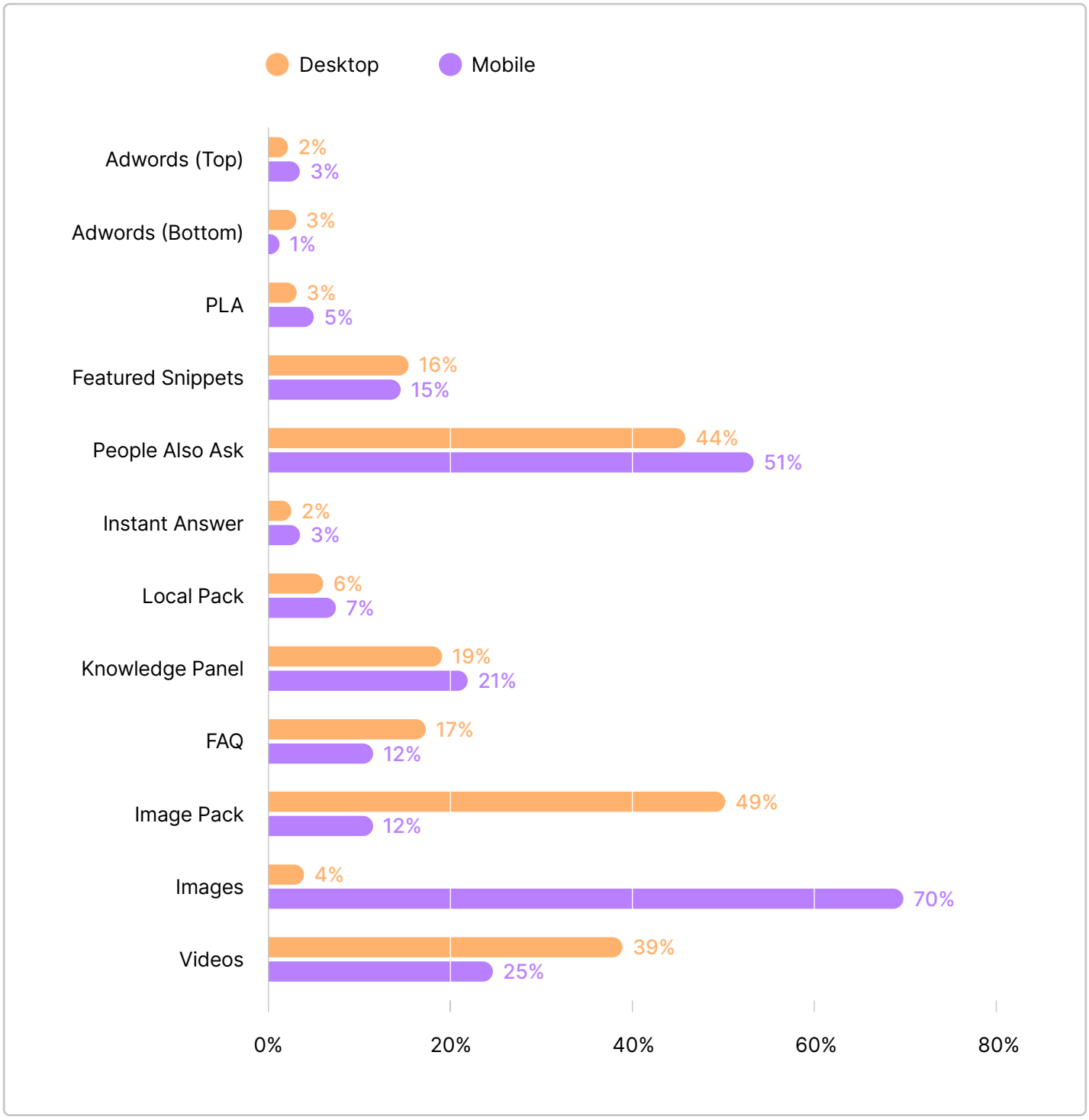
Change of SERP Features Display Frequency on SERP

Average 2020 vs Average 2021



SERP Features Average Display Levels

Average 2021 (January-September)



The Paid SERP

Let's start with the paid elements of the SERP, namely, Product Listing Ads (PLAs) and Search Ads.

We found that Search Ads appeared less frequently on the SERP across all devices in 2021 compared to 2020.

On mobile, Google Ads appeared at the top on average for only 3% of SERPs in 2021. On desktop, they were even less frequent, showing on only 2.4% of all SERPs on average.

In terms of frequency in 2021 vs 2020, Search Ads that appeared at the top of the SERP were down:

↓ 55% on desktop
↓ 44% on mobile

Those that appeared at the bottom of page one on the SERP were also down:

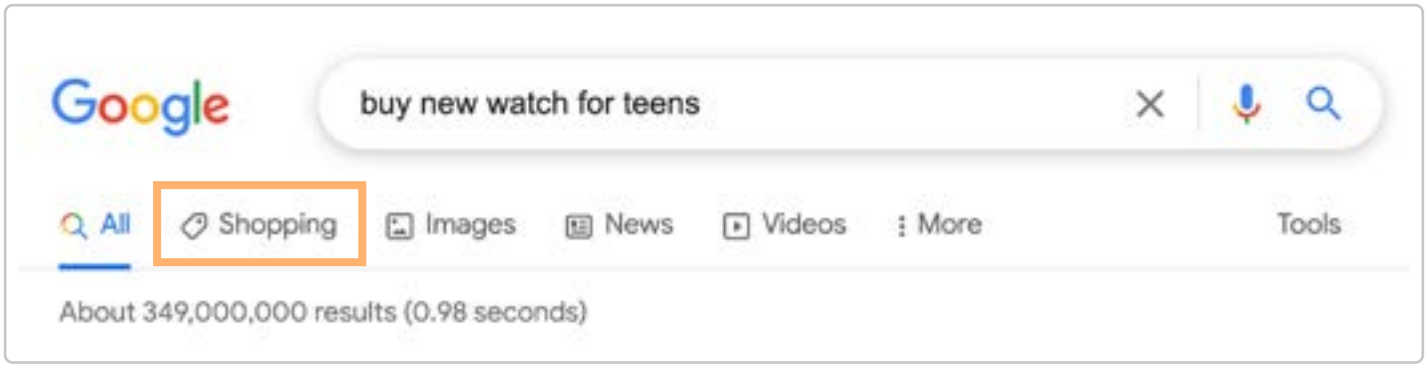
↓ 53% on desktop
↓ 27% on mobile

Across the devices, it's evident that Google scaled back on Search Ads across the board. It reduced the number of top-of-the-SERP ads to a far greater degree than bottom-of-the-SERP ads on mobile, to the tune of 38%. Google Shopping ads were also down significantly across the board in 2021 compared to 2020.

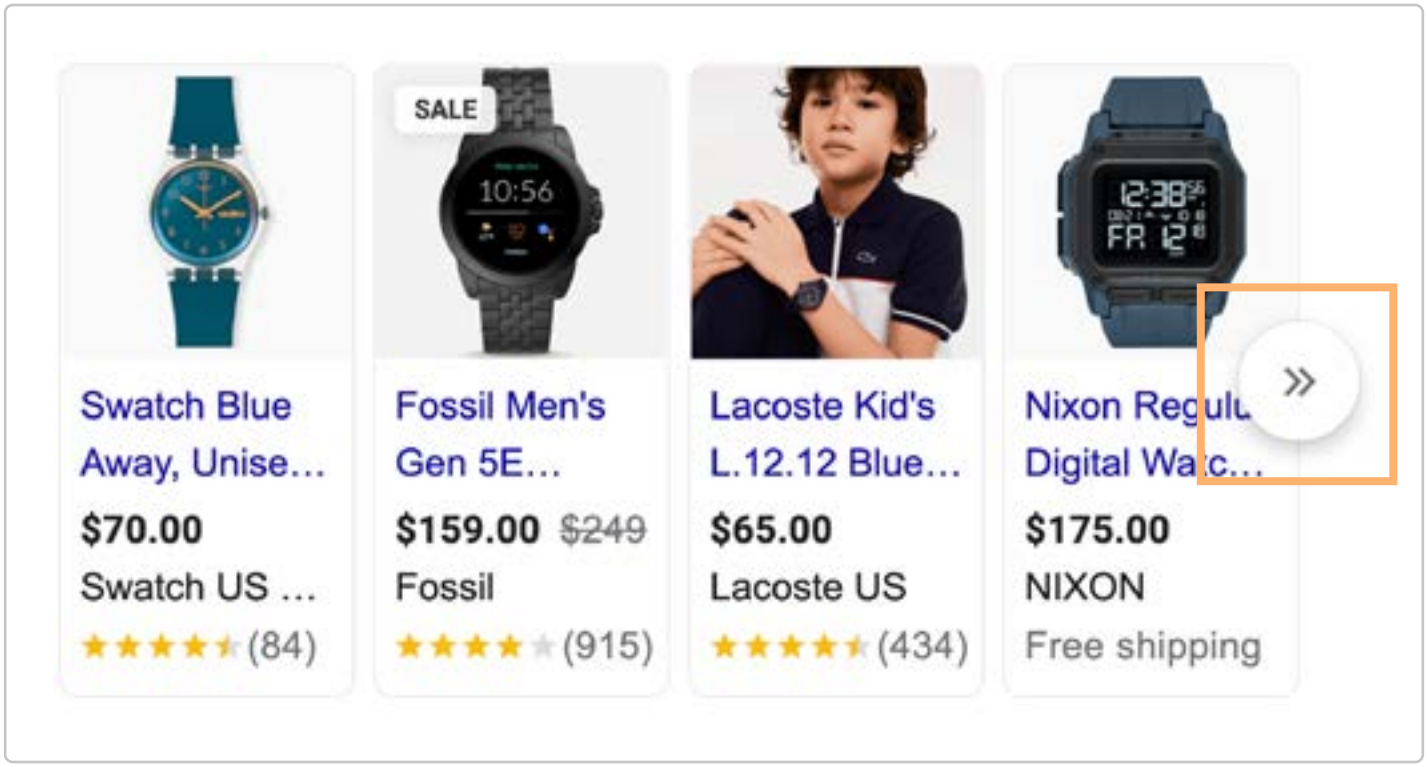
That reflects a year-on-year decrease of:

↓ 52% on desktop
↓ 34% on mobile

In recent times, Google has developed a sharper focus on its shopping properties. This focus began in April 2020 as Google opened up its Merchant Center to free organic listings. Since then, the search engine has taken up a variety of initiatives to propel its Merchant Center, including partnering with Shopify on an integration announced in May 2021. One of the problems with increasing Google Shopping's prominence is that the results are not found on the main SERP, but via a dedicated tab above the search box (i.e. Shopping), so it presents a dilemma in terms of generating both traffic and revenue.



Limiting PLAs could, in theory, decrease the chances of users engaging with Google Shopping, as clicking to see the full set of results from the PLA carousel moves the user to the Shopping tab automatically.



By increasing PLAs, for instance, Google may be able to solve the problem of its SERPs not being focused on product listings in the same way as, say, Amazon is, so the decrease here is a curious one.

In terms of pure display numbers on average in 2021, PLAs appeared on:

2.5% of desktops SERPs
5% of mobile SERPs

We can deduce from this that PLAs are now twice as common on mobile as they are on desktop.

Organic SERP Features

In 2021, we witnessed some significant changes to the display trends of various SERP features. Let's take a look at what happened:

In 2021, Google decreased utilization by:

↓ 15% on desktop

↓ 9% on mobile

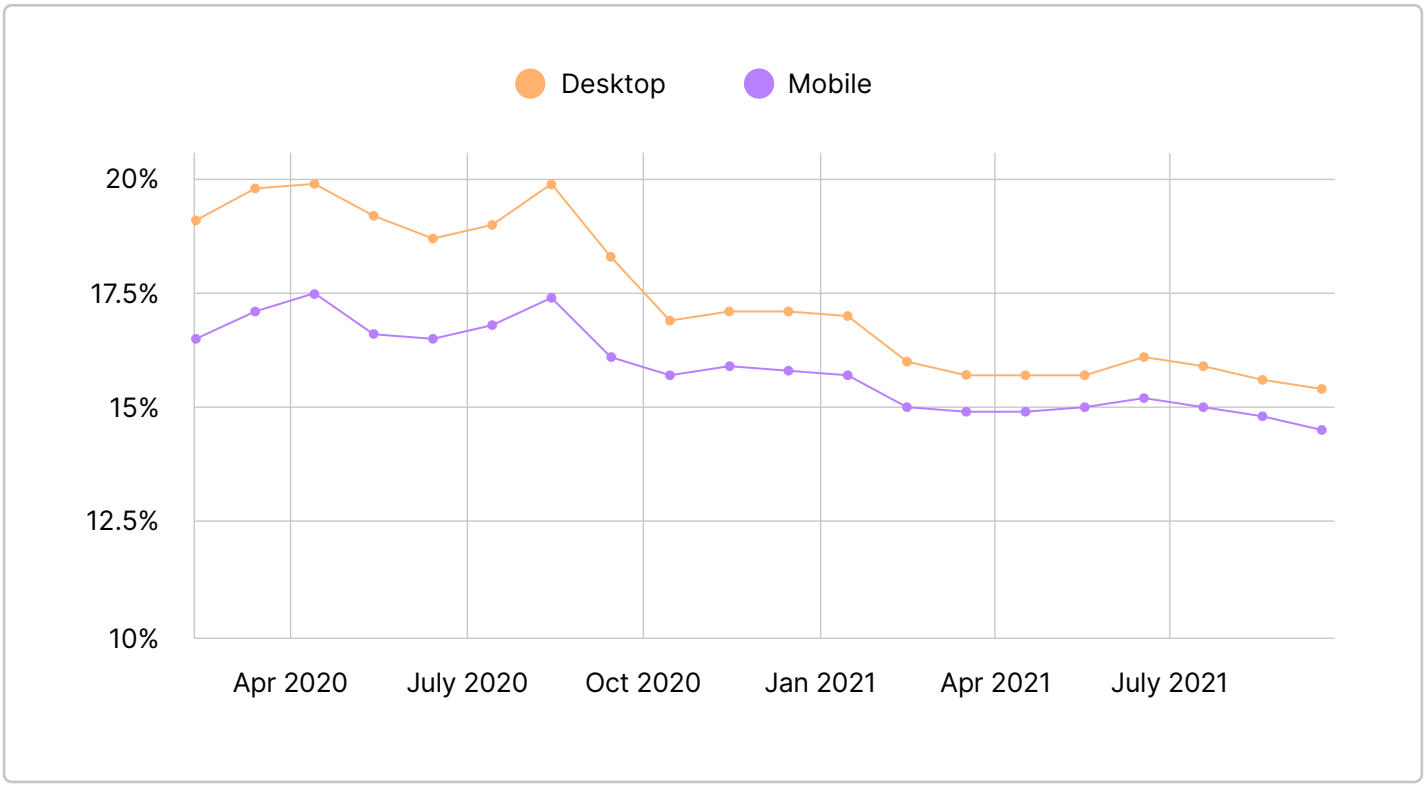
Featured Snippets

As one of the most prominent of all SERP features, Featured Snippets have the potential to bring a significant amount of traffic to sites.

If we look at the occurrence trend over the past two years on desktop, we can see that Featured Snippets frequently appeared on over 19% of all SERPs throughout 2020, but that dropped to roughly 16% in 2021.

On mobile, Featured Snippets reached a high of around 17.5% in 2020, but the average dropped to around 15% in 2021.

Featured Snippet Occurrence Trend



People Also Ask

Unlike Featured Snippets, the People Also Ask feature grew significantly in 2021.

Here, the SERP saw increases of:

↑ 25% on desktop

↑ 11% on mobile

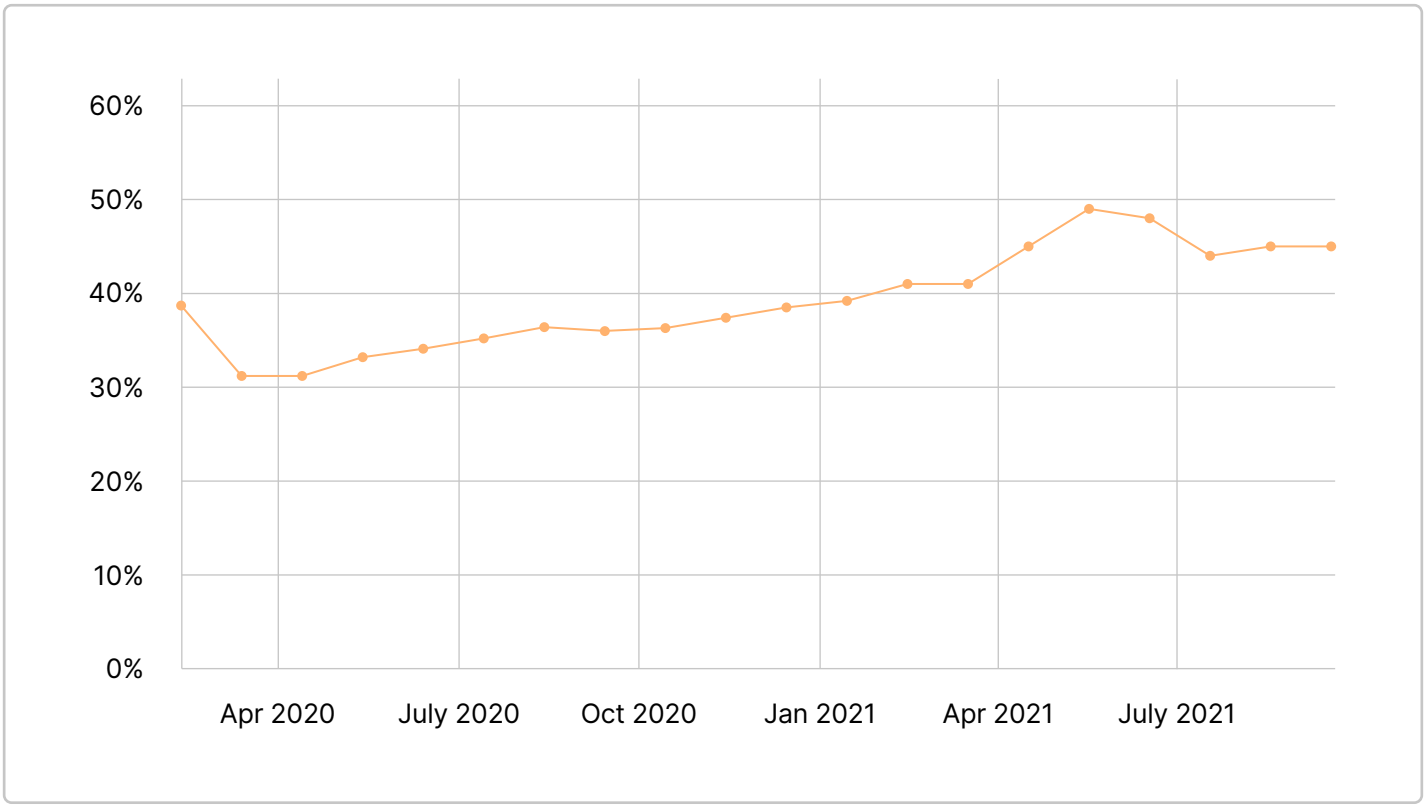
On desktop, the upwards trend began towards the end of 2020. Until November 2020, the feature's display levels generally hovered around 35-36%, but this jumped to 37.4% in November and 38.5% in December.

By February 2021, People Also Ask appearances moved past the 40% mark and remained so for the rest of the recorded year.

There was a similar trend on mobile, but at a higher level. The People Also Ask feature generally appeared on over 40% of SERPs throughout 2020, but it jumped above 50% in 2021.

People Also Ask Occurrence Trend

Desktop



Instant Answers

In a similar fashion to People Also Ask, the Instant Answers that Google provides in its SERPs became significantly more common on mobile, with an increase of 16% year-on-year.

However, on desktop, there was a 3% decrease in the frequency of the feature.

The actual display levels on both desktop and mobile were quite similar; Instant Answers appeared on 2-3% of all SERPs across devices. So, while mobile numbers were slightly up, there was little evidence of significantly increased reliance on this SERP feature.

Local Packs

Local listings, when not triggered by a branded search that initiates the Google Business Profile, can appear within a business' Local Pack, which generally contains three listings (the specific Hotel Pack shows four).

Compared to 2020, their appearance levels:

↓ 1% on desktop

↑ 2% on mobile

Changes were evidently marginal, while overall display levels across devices were low in 2021. They appeared on:

5.8% of desktop SERPs

7% of mobile SERPs

Knowledge Panels

Analyzing the Knowledge Panel feature is a great way to track the growth of the Knowledge Graph.

The panels appear on roughly 20% of both desktop and mobile SERPs. Their average display levels in 2021 were:

19.5% on desktop

21% on mobile

In terms of growth or constriction, these averages reflect an:

↑ 8% in display frequency on desktop

↓ 11% on mobile

The ways in which the Knowledge Panels are displayed across devices could be at play here. They are allocated a separate space to the right of the results on desktop, but they take up more valuable real estate on mobile SERPs and replace other content, so they may be less frequently deployed as a result.

FAQ Results

Implementing FAQ markup to appear with a set of expandable questions on the SERP can be a powerful way to enhance your organic listings.

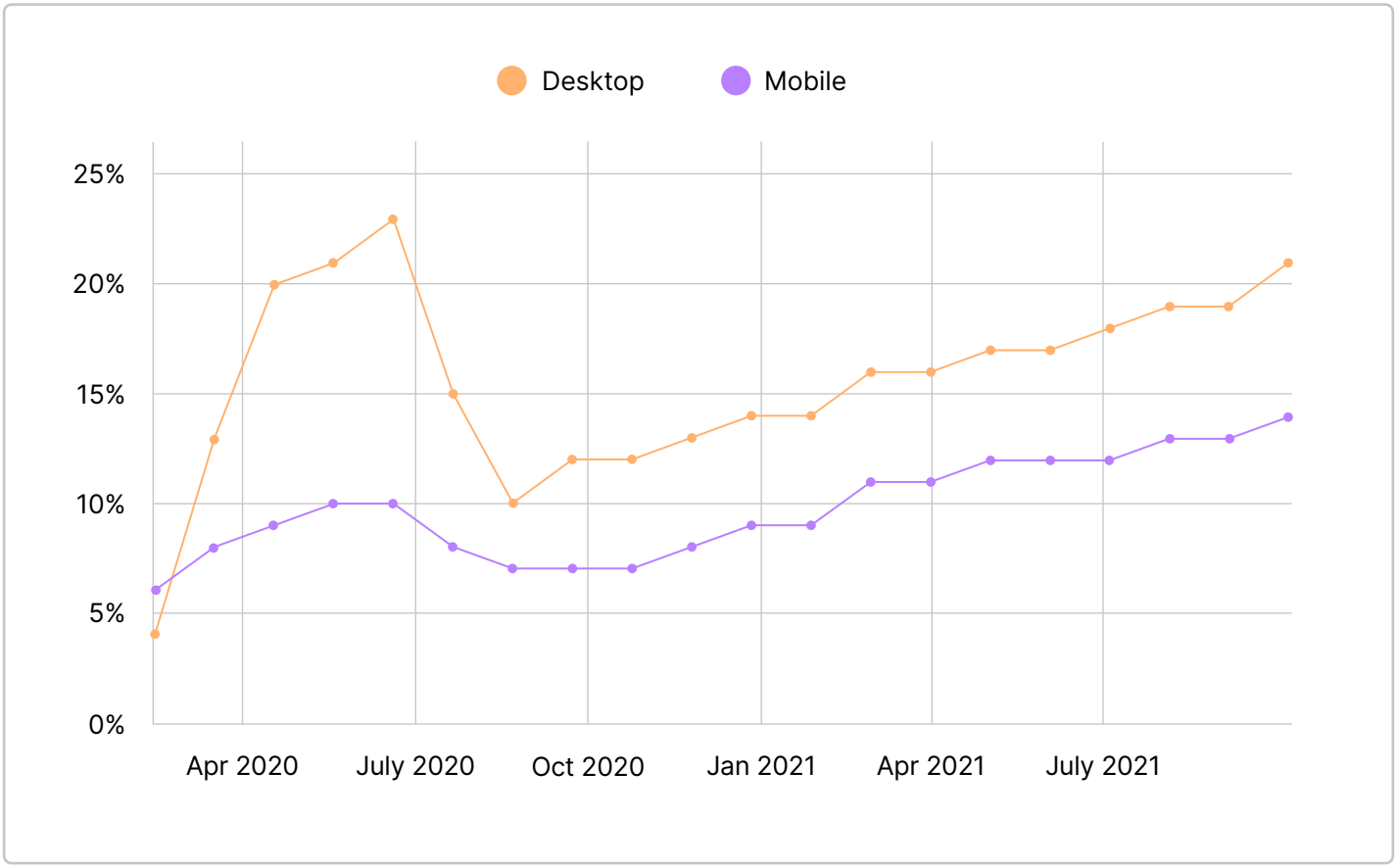
Yearly increases in the appearances of the feature across both mobile and desktop are testaments to this, as FAQ results appeared on 47% more mobile SERPs and 22% more desktop SERPs in 2021 than in 2020.

This meant that display levels were:

17.5% on desktop
12% on mobile

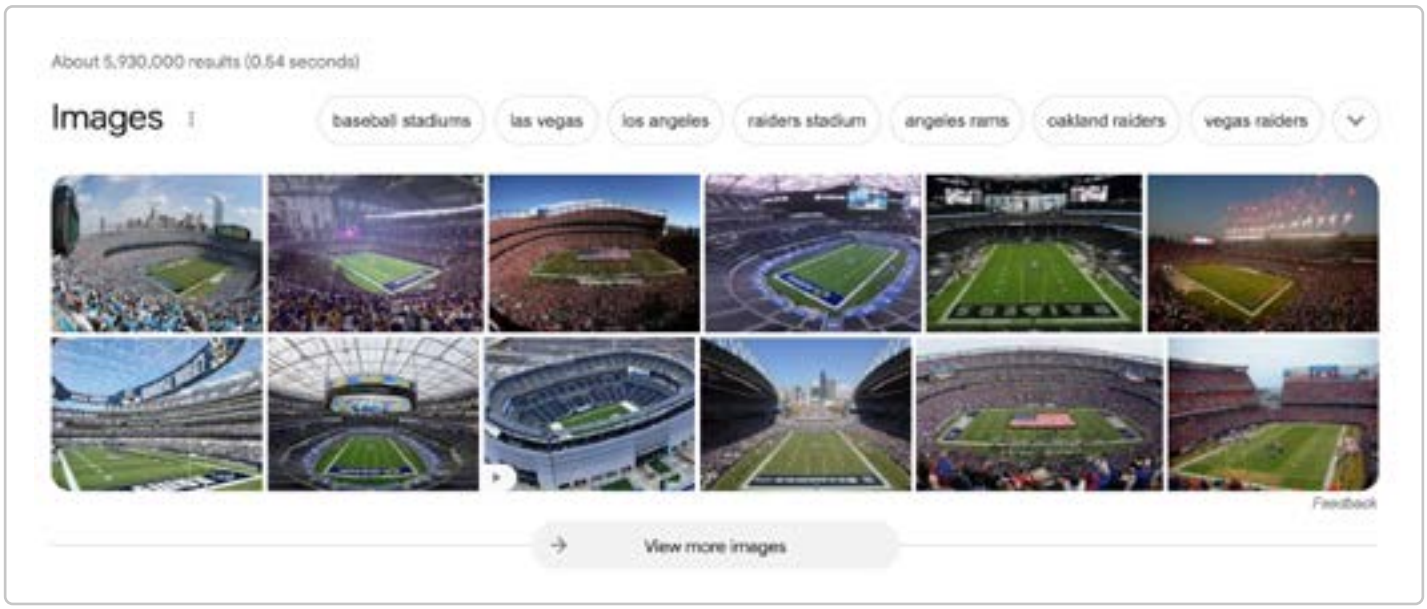
It's possible that these increases were partly to do with Google limiting each FAQ instance on the SERP to a maximum of two questions ↗, as the highest levels of the feature in 2021 came after this confirmation in June that year.

FAQ Occurrence Trend



Images

Visual elements on the SERP increased in places and, yet, decreased in others. Image Packs, for instance, were down across devices.



This may be due to change further still in 2022, as some of the announcements at Google I/O were focused on a more visual mobile SERP.

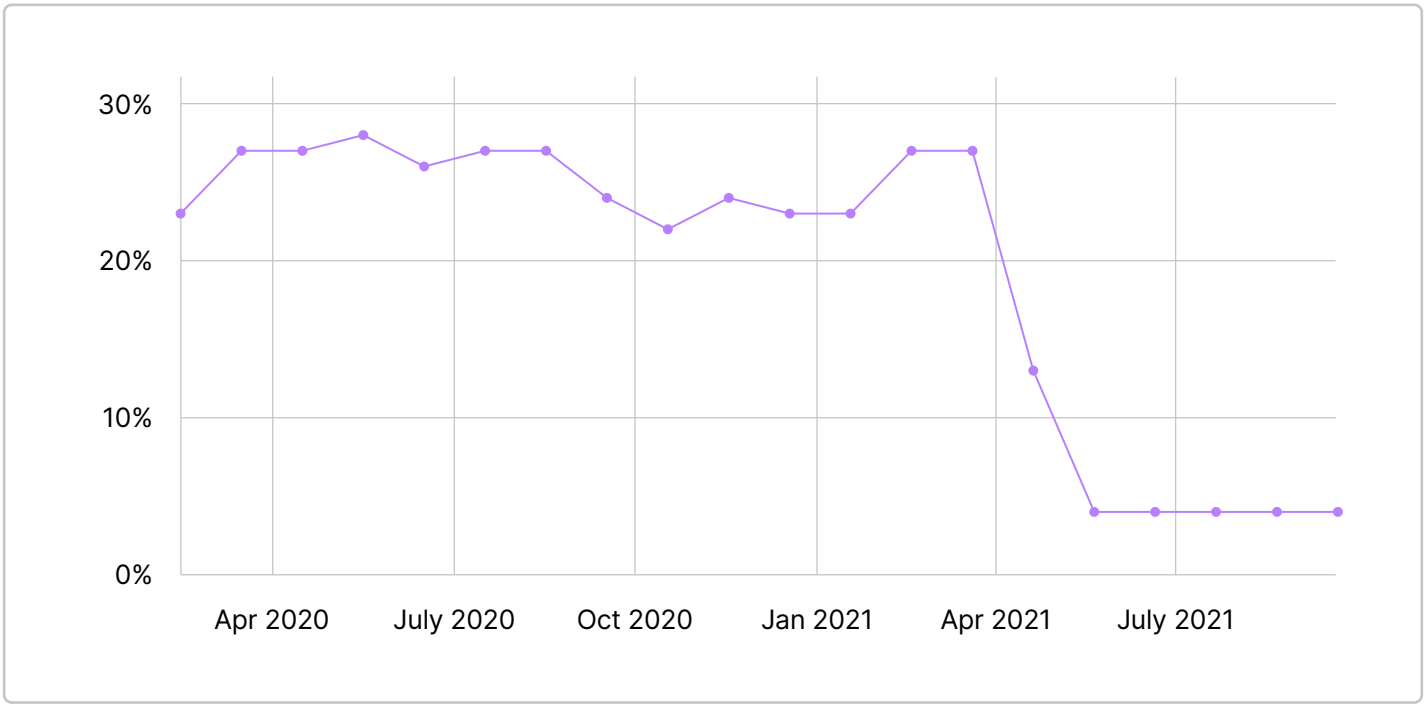
Specifically, their display levels decreased as follows:

↓ 28% on desktop
↓ 53% on mobile

In fact, desktop and mobile were very different in their tendency to show this feature in 2021. On desktop, they were one of the most popular features, appearing on 49.1% of SERPs. On mobile, however, the feature appeared on only 12% of SERPs. There was a sharp drop-off after May 2021, which was when changes to mobile SERPs imagery were announced at Google I/O 2021.

Image Pack Occurrence Trend

Mobile



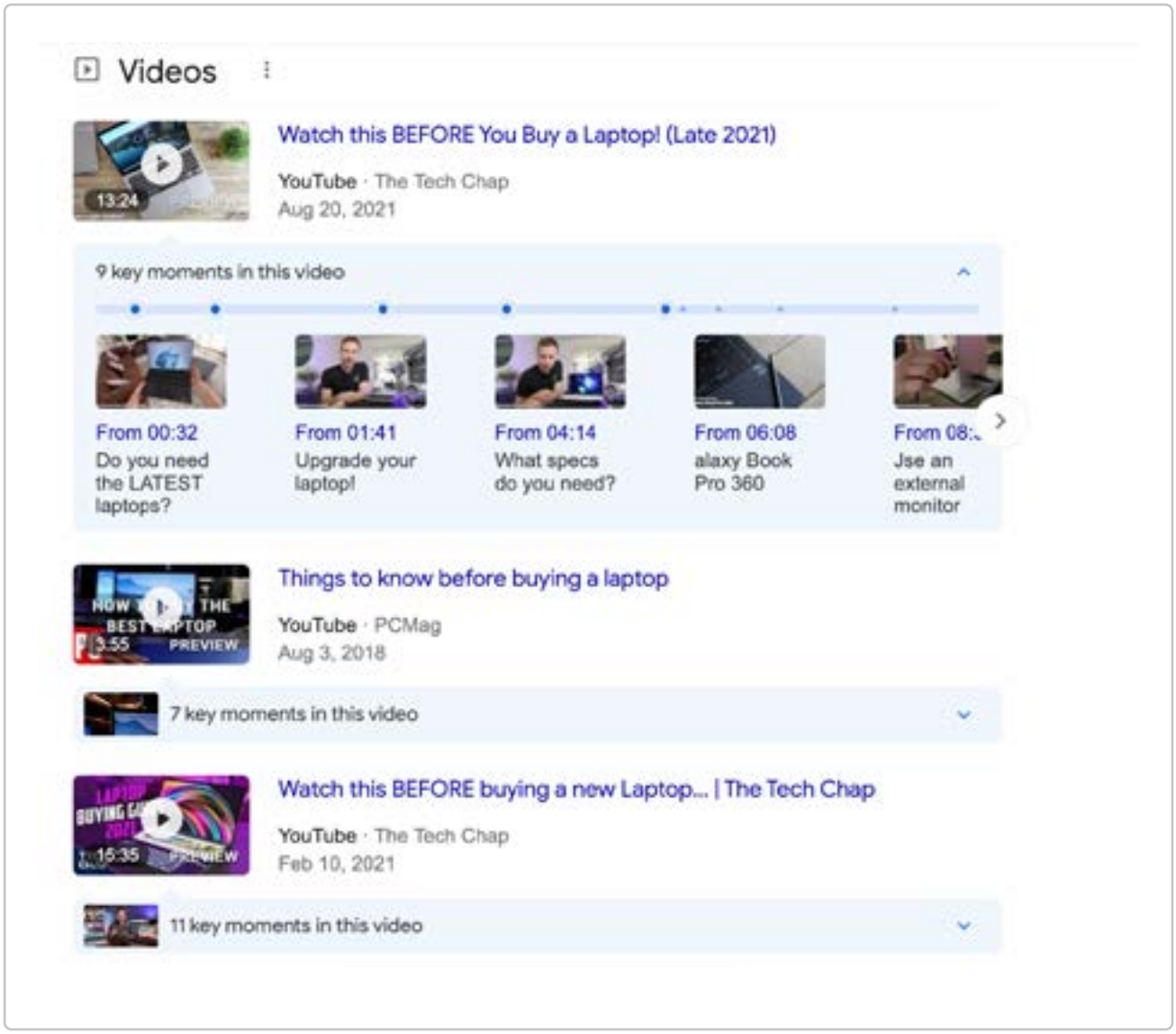
When it came to the use of images within organic results, such as the various forms of Image Thumbnails, we saw a far less dramatic shift.

On mobile, there was a marginal 1% increase in the use of thumbnails in 2021; the feature appears at least once on 69% of mobile SERPs.

On desktop, there was a 10% increase in the display levels of such image thumbnails, bringing the average display level to 3.8%.

Videos

The Video Box is one of the most common SERP features as it is appropriate for a wide range of search intentions.



In 2021, its display levels were:

39% on desktop

25% on mobile

When compared to 2020, we see that these numbers increased:

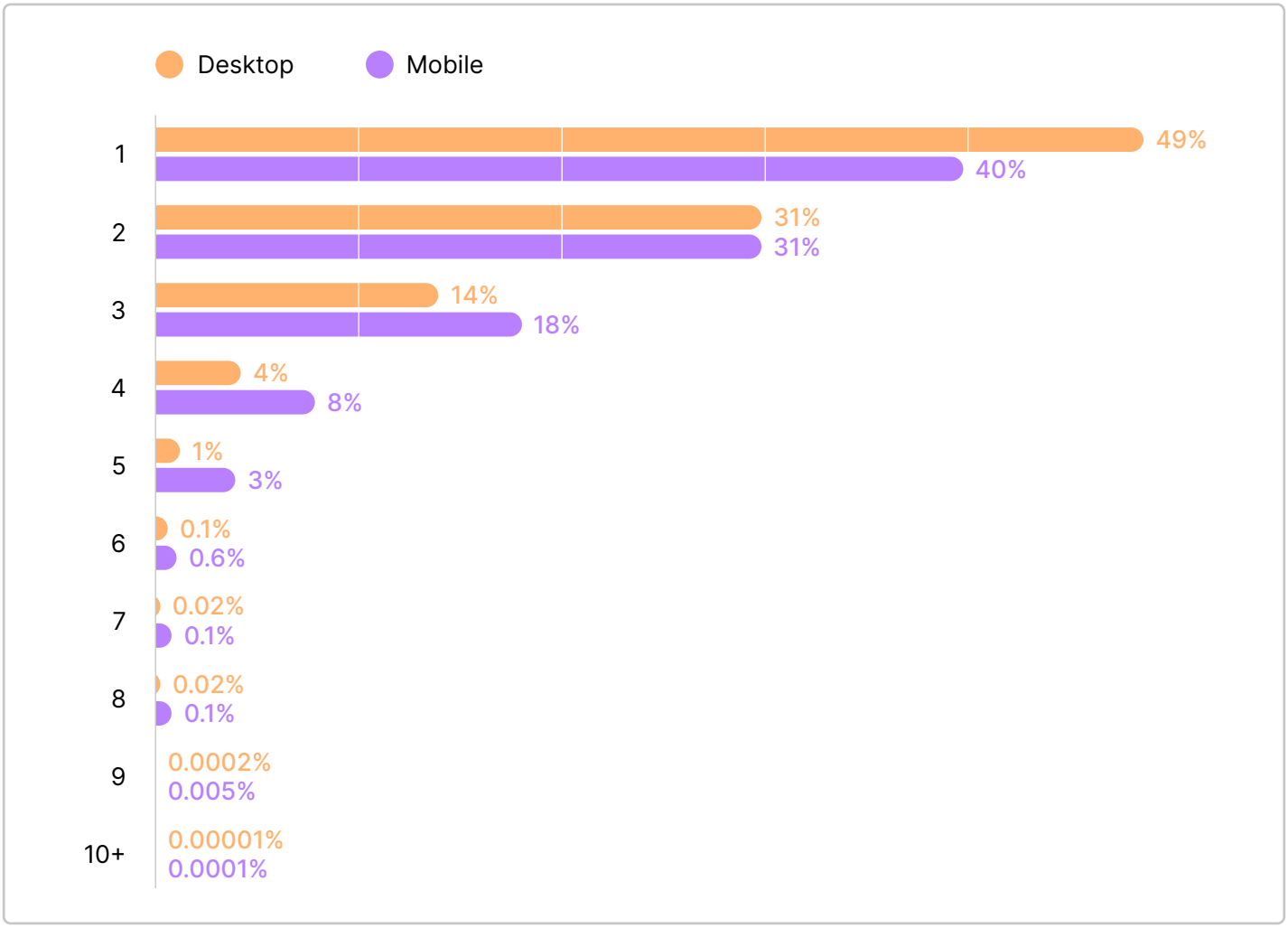
↑ 4% on desktop

↑ 56% on mobile

On the State of Featured Snippets

Despite being on the decline in 2021, they appeared on 16% of desktop SERPs and 15% of mobile SERPs. It also followed that there was long-term value in gaining Featured Snippets, as many URLs were able to retain them:

Number of Unique Domains in Featured Snippets vs Percentage of SERPs With This Number



On desktop, nearly 50% of the URLs that showed within the Featured Snippet stayed there for the entire year. On mobile, fewer achieved the same success, but it was still at a rate of 40%.

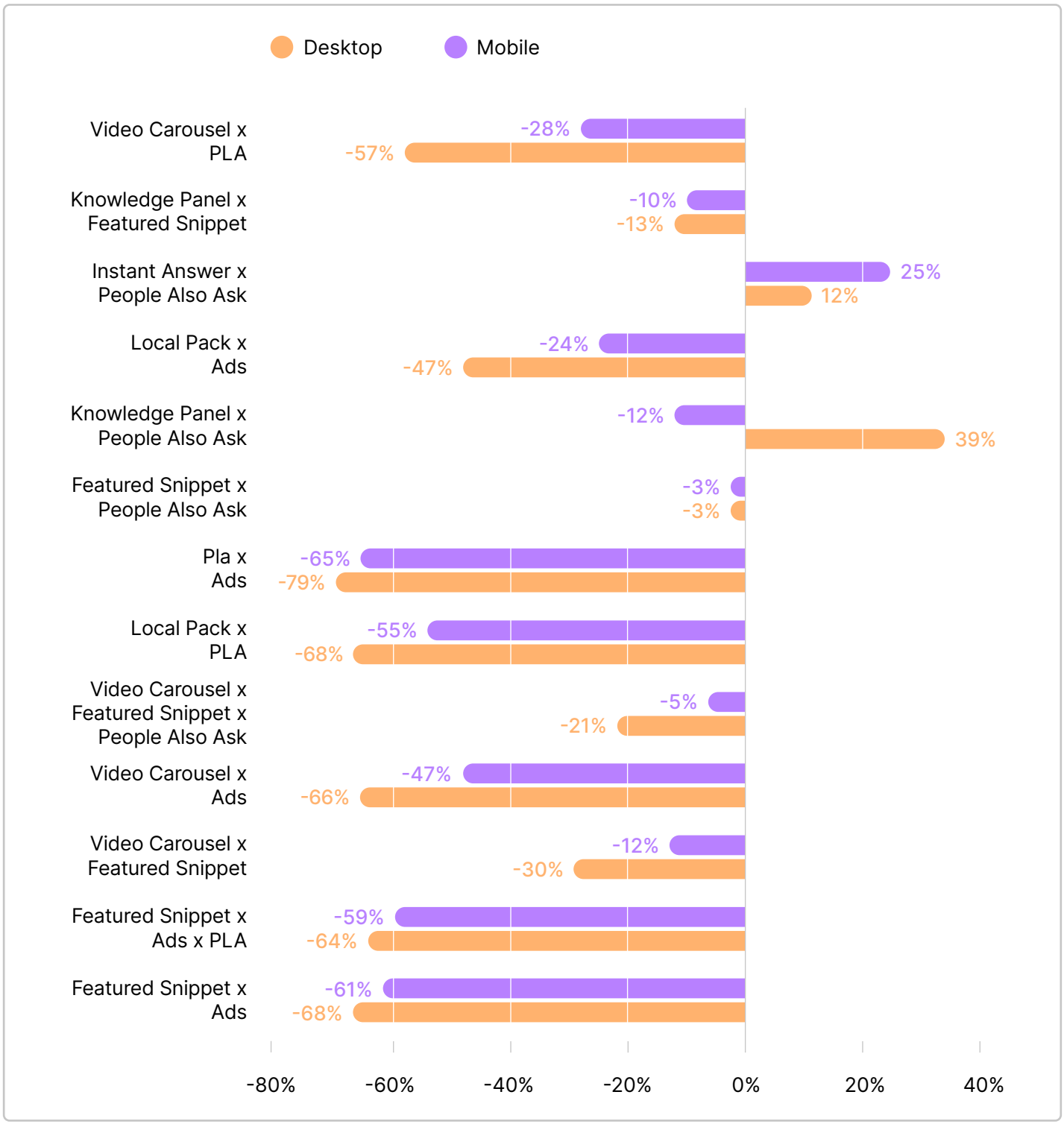
In fact, 31% of Featured Snippets only showcased two URLs over the course of the year on both mobile and desktop, which indicates the value of gaining the feature when it comes to market share of traffic.

The use of three URLs within a given Featured Snippet dropped to 14% on desktop and 18% on mobile, and dwindled significantly thereafter.

SERP Feature Pairings

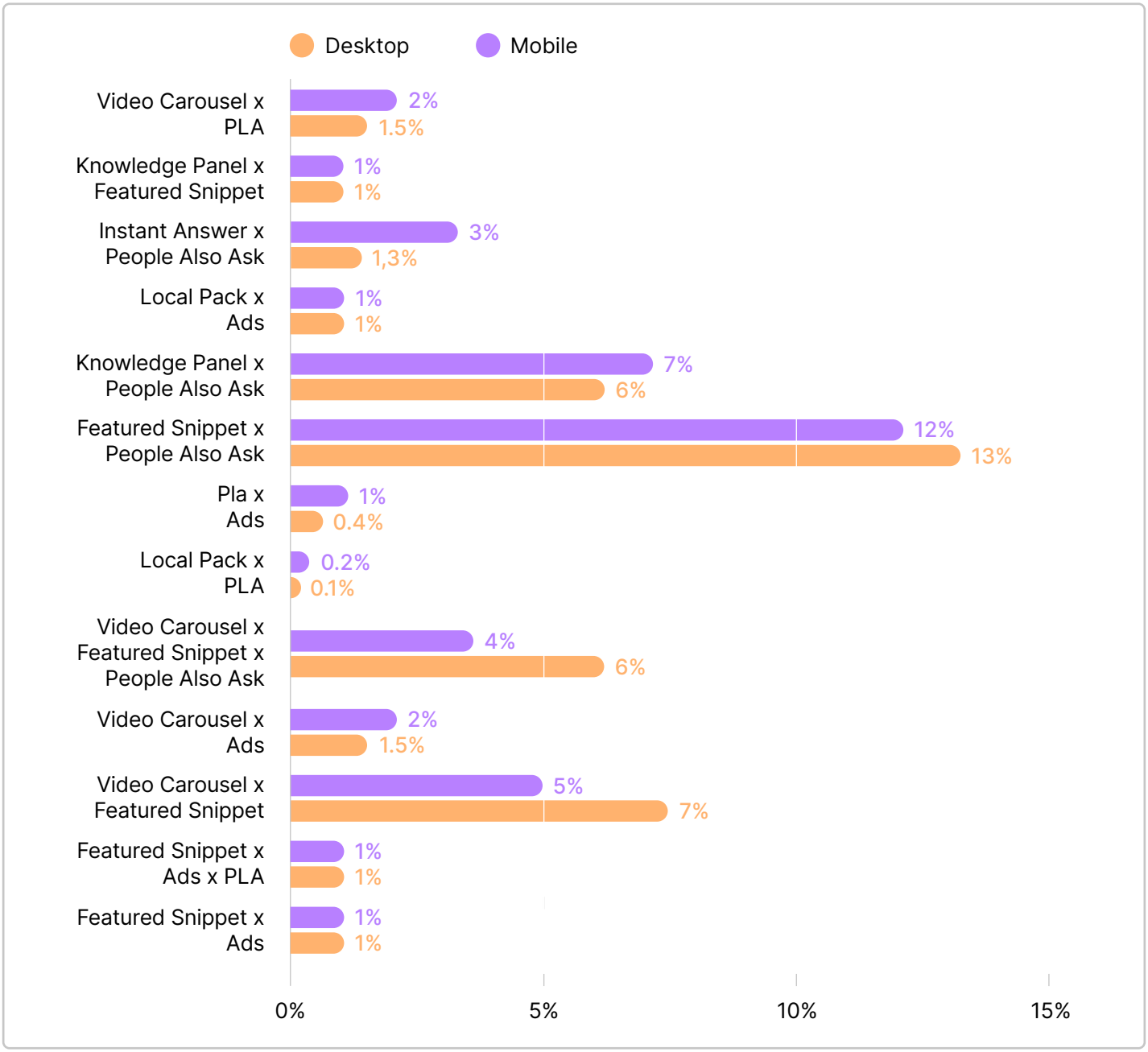
Change of SERP Features Display Frequency on SERP

Average 2020 vs Average 2021



SERP Feature Groups Display Levels

Average 2021



To find out which features were most commonly found on the same SERP, we looked at both the % of SERPs that contained various pairings of SERP features, as well as how likely these features were to be shown simultaneously in 2021 compared to 2020.

It's important to remember here that the data set we analyzed was normalized, i.e. it was not predisposed towards high-search-volume, long-tail keywords. Also, the propensity for various SERP features to appear together may vary according to the specific subset of keywords; what you see here is an average of the majority of possible feature pairings.

SERP Feature Pairing Display Levels

For the most part, when looking at how many SERPs contained various pairings of SERP features, the numbers weren't astronomical. For example, Video Carousels and PLAs appeared together on only 2.3% of desktop SERPs, and even fewer on mobile at 1.5%.

The most notable example of this was the percentage of SERPs that contained both a Search Ad and a Featured Snippet. This happened on fewer than 1% of both mobile and desktop SERPs, which is significant because Search Ads are one of the few elements that have the ability to appear above and not below a Featured Snippet.

Conversely, there were other features shown together on a significant number of SERPs; the People Also Ask feature appeared frequently alongside both Knowledge Panels and Featured Snippets. Regarding the latter, this combination appeared on 11.8% of mobile SERPs and 13.1% of desktop SERPs, making it the most common pairing in our data set.

The type of device seemed to play a small role in the bidding process that impacted these pairings. Featured Snippets, for instance, were shown with more People Also Ask features on desktop (13.1%) than on mobile (11.8%). The same was true for Featured Snippets and Video Carousels, which appeared together on 6.8% of desktop SERPs and 5.2% of mobile SERPs.

This was similar to the combination of Video Carousels and Search Ads, which appeared on 5.8% of desktop SERPs and on 4.4% of mobile SERPs.

Comparing SERP Feature Pairing Tendencies: 2020 vs 2021

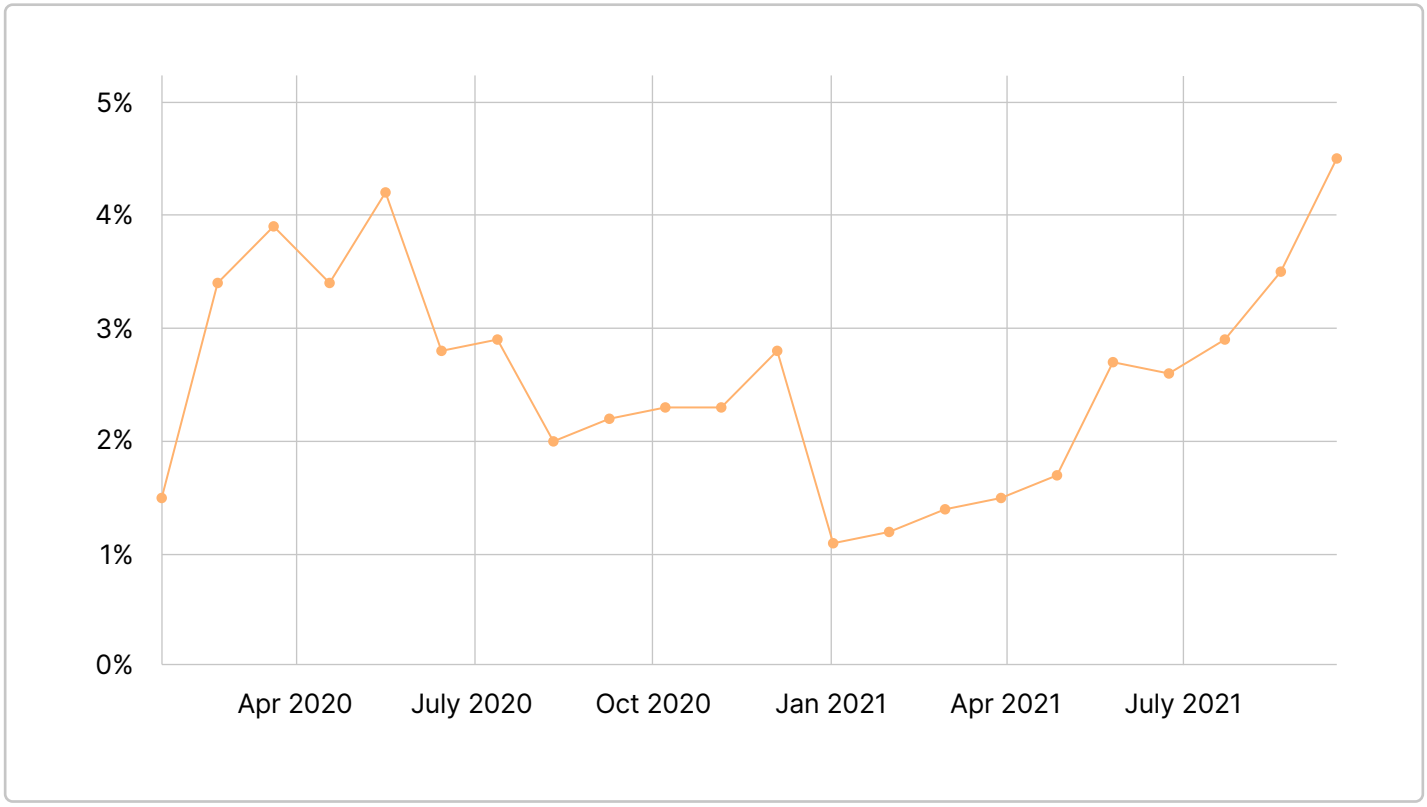
There were widespread decreases in the frequencies of SERP pairings on Google in 2021 versus the previous year. Only one pairing, Instant Answers and People Also Ask, became more frequent in 2021 than in 2020 across both devices. Knowledge Panels and People Also Ask also increased appearances as a pairing, but only on desktop.

PLAs and Search Ads, Local Packs and PLAs, Featured Snippets and Search Ads, as well as Featured Snippets, Ads, and PLAs as a trio, were all combinations that decreased in frequency by over 50% across both devices in 2021.

Of course, while the tendencies of some of these pairings may have changed dramatically in 2021, many of them show low display levels overall, so they are generally uncommon.

With that said, though, there were great fluctuations experienced with certain pairings. For example, the average display level of Video Carousels paired with PLAs might have decreased by 56.8% on desktop and 29.7% on mobile in 2021, but that represents the average across the year.

Video Carousel x Shopping Display Levels Trend



By October 2021, you can see that the pairing of Video Carousels and PLAs was higher than it had been in well over a year. While some pairings appeared to be more consistent, such as Featured Snippets and People Also Ask, there was a great deal of volatility evident in others.

SERP Title Rewrites

Methodology

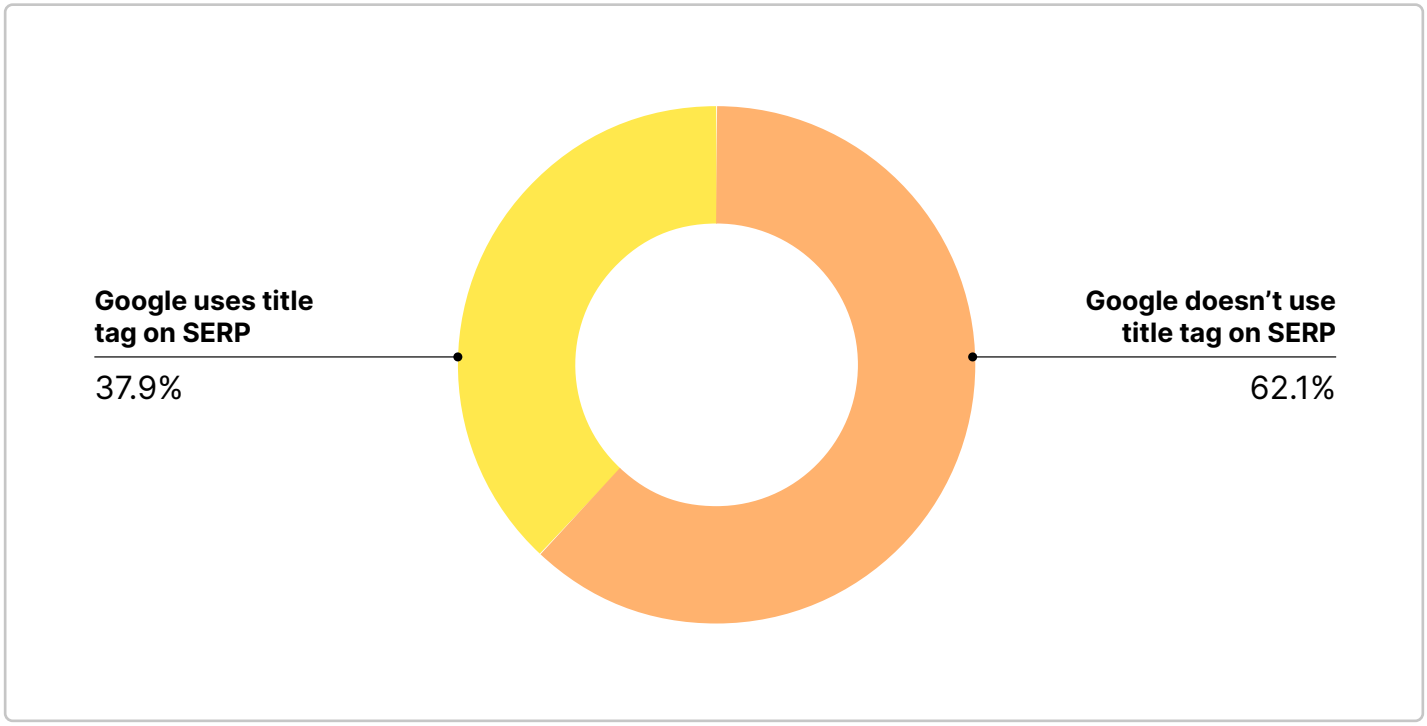
We collected data for 16,695 URLs from the SERPs. They included page titles that Google showed on its SERPs, and contents of the title tags on the associated web pages.

Towards the end of August 2021, the SEO industry began to notice that Google was rewriting a greater quantity of SERP titles than ever. Google was, in essence, ignoring the title tag associated with any given page.

The issue concerned both the number of rewrites, which Google confirmed to be true, and the quality of the rewrites, which was initially thought to be far lower than the title tags implemented by the site owners.

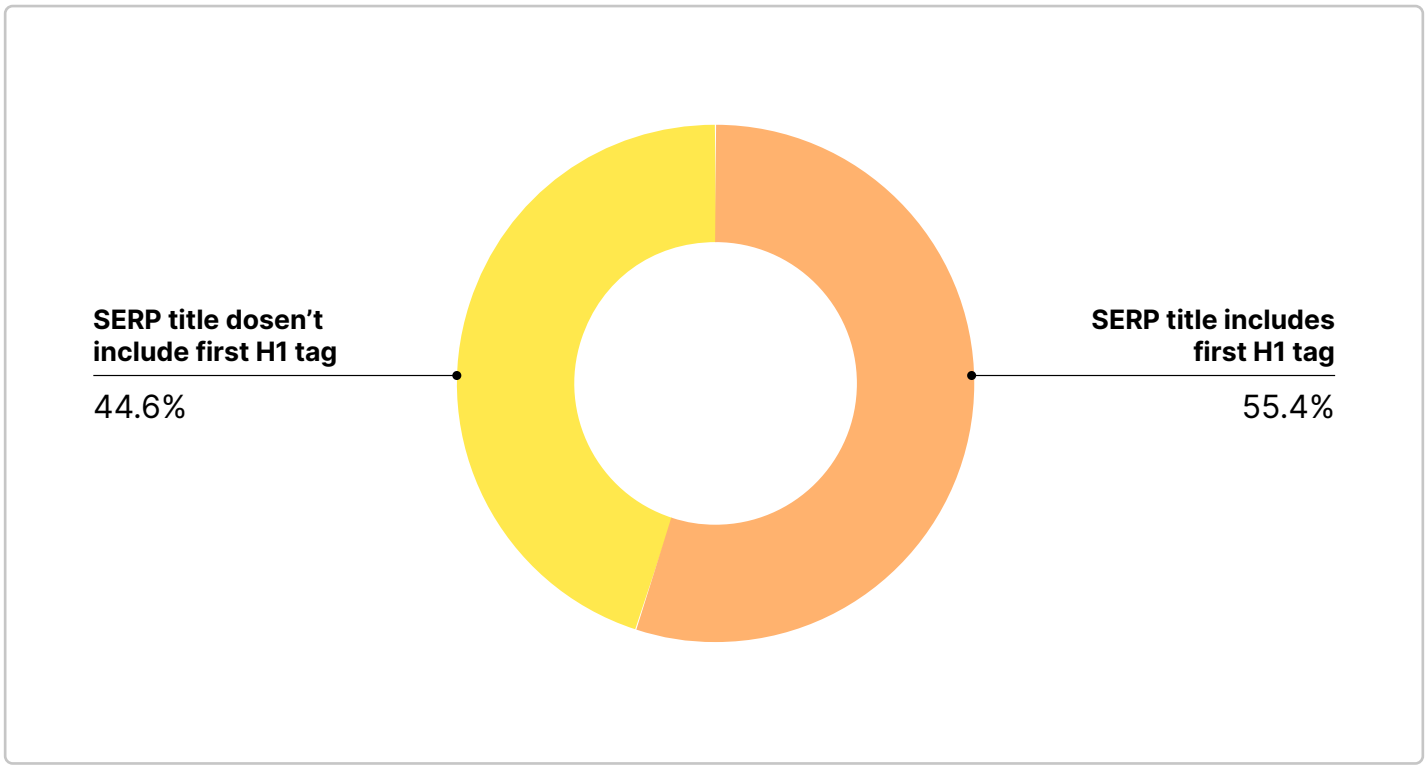
According to our data up to October 2021, Google was still ignoring title tags and rewriting the SERP title 62.1% of the time.

Google Using Title Tags on SERP



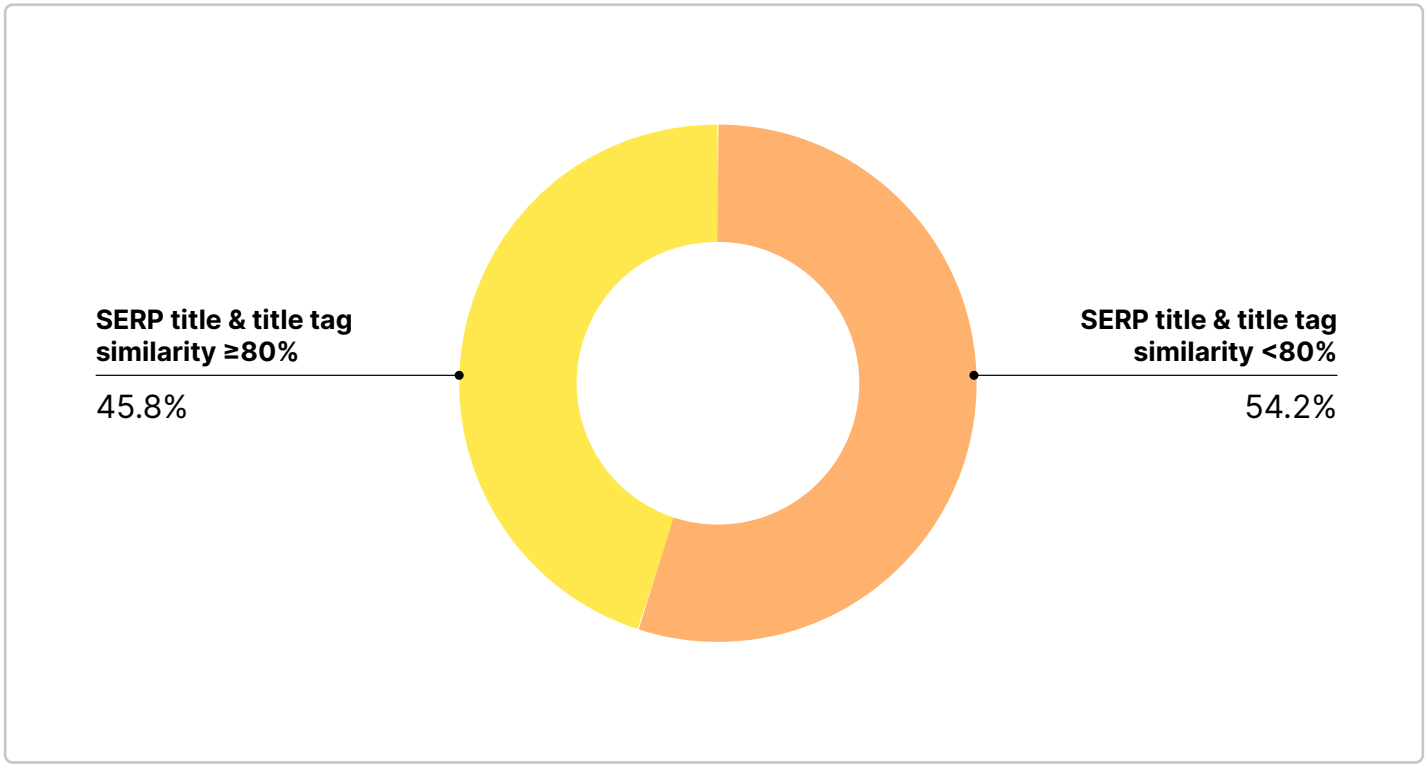
Of these instances, Google used the H1 tag found on the page as the SERP title 55.4% of the time.

SERP Title Including H1 Tags



When we analyzed the differences, we found that 46% of all rewrites studied had an 80% similarity match or better, so a significant number of the title tags were only changed by up to 20%.

Titles Similarity Ratio



The reasons behind the changes may be to do with Google's attempts to better serve the large portion of the web that is not optimized for search.

However, it must be considered that click-through rates (CTRs) can be affected if certain keywords are removed from title tags. Our data set, which covers the top 20 results on the SERPs, showed that vast numbers of URLs may have been affected by this in 2021.

State of eCommerce

This section investigates the state of eCommerce on the SERPs by diving into Amazon's organic performance, relative to the overall organic eCommerce market, as well as its paid SERP tendencies.

Methodology

In order to analyze the state of Amazon, its competitors and market, we collected the following:

Search traffic using

Traffic Analytics

The number of PLAs via

PLA research

The number of Search Ads using

Advertising research

The number of organic keywords using

Organic Research

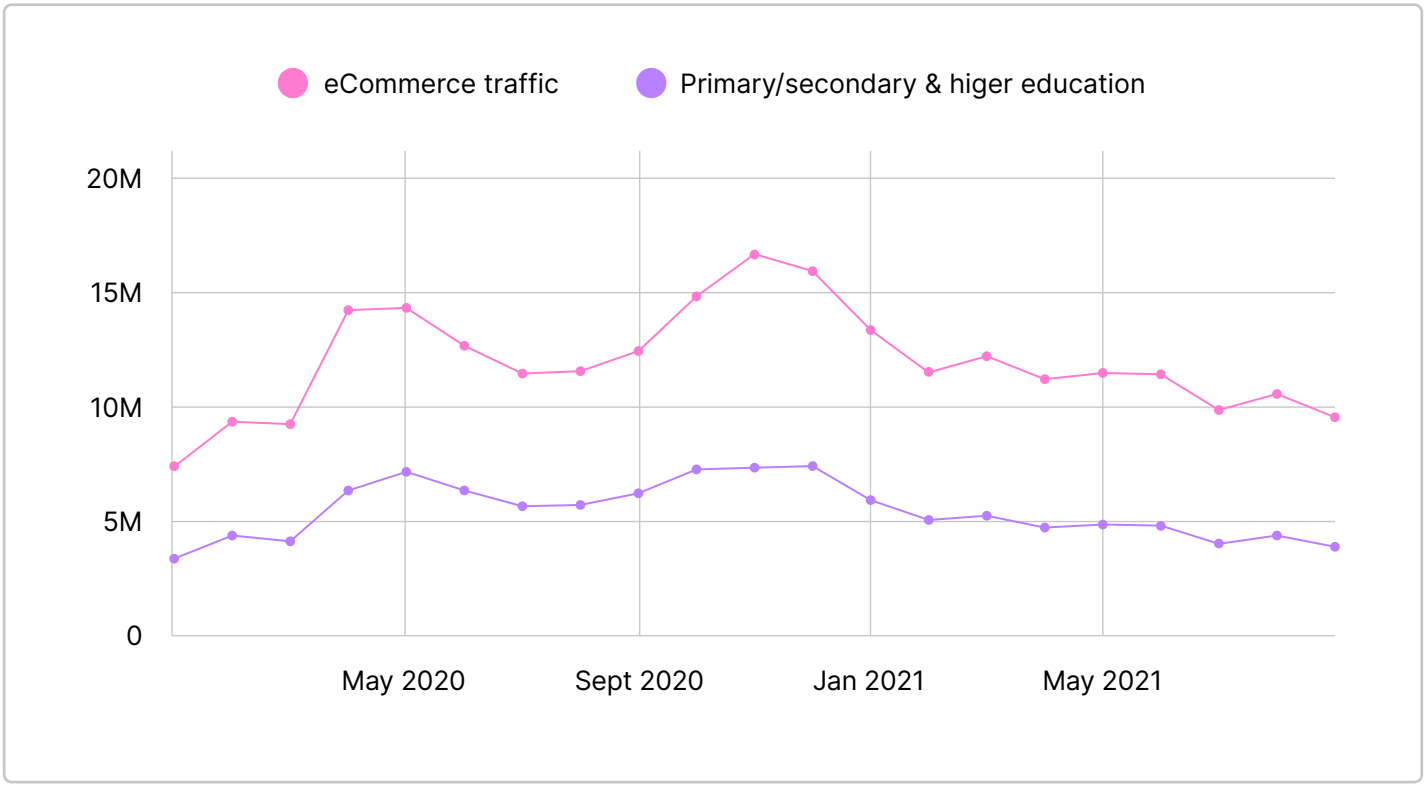
We analyzed US SERPs data for the last five months (June-October 2021) in order to check the presence of PLA and Popular Product SERP features.

The State of eCommerce in 2021

Let's start by looking at eCommerce from an organic point of view. That is, how did the amount of organic traffic that the niche pulled in during 2021 compare to 2020?

Overall, eCommerce saw a significant shrinking of its collective organic traffic. Year-on-year, the amount of organic traffic going to eCommerce sites decreased by 23.2%

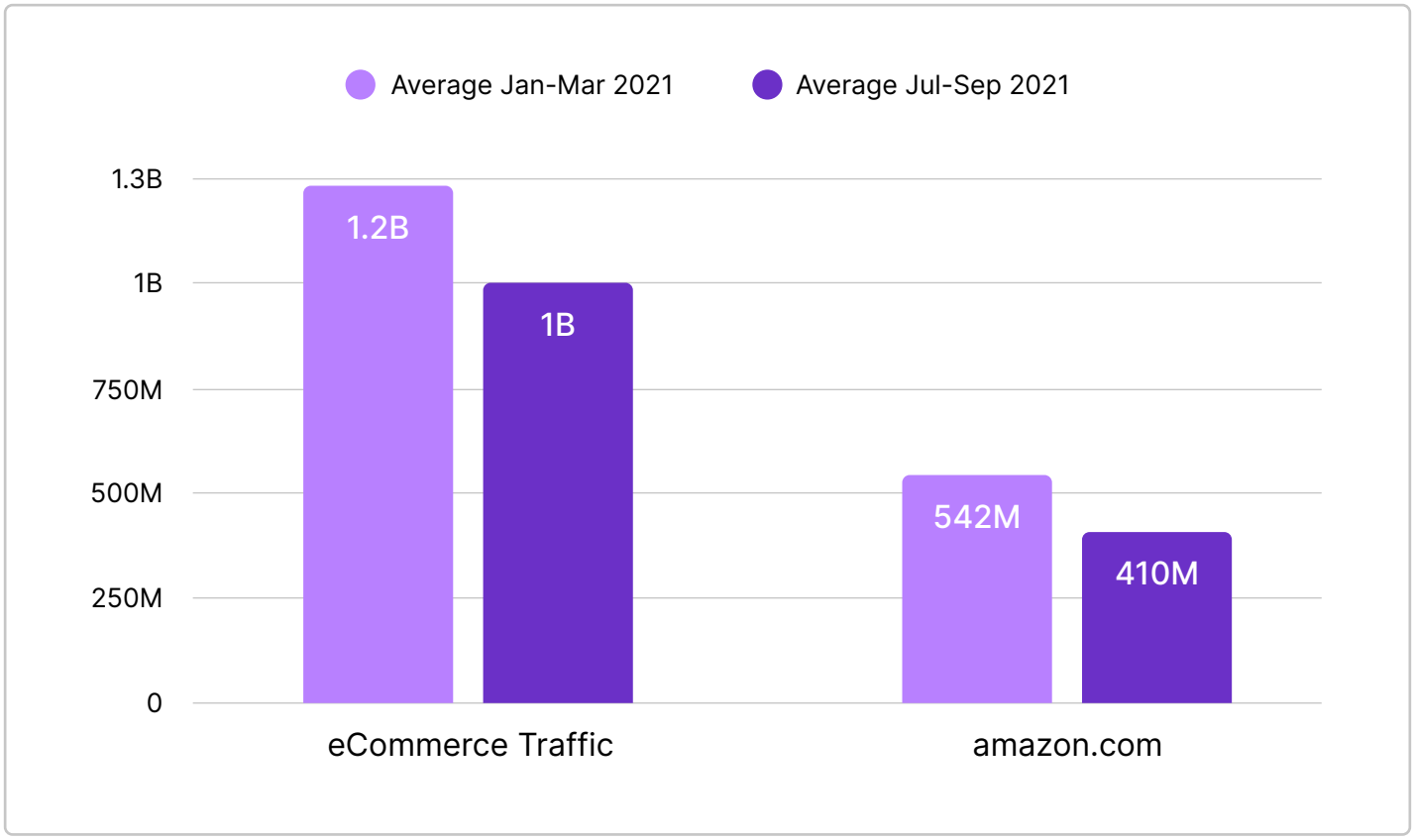
Search Traffic Trend, All Platforms



Amazon in particular saw an even more significant downturn with a loss of 37.5% of its organic traffic versus 2020. This represented Amazon losing 18.6% of its organic traffic market share.

The early months of 2021 saw organic traffic trends similar to those of 2020. However, as the summer months came around, there was a clear and substantial drop-off in organic traffic across the vertical. Specifically, there was an organic traffic loss of nearly 20% between July and September compared to the first three months of the year. This is highlighted by the traffic losses seen by the market leader, Amazon. Clearly, the market underwent a shift.

Organic Traffic: Trends 2021



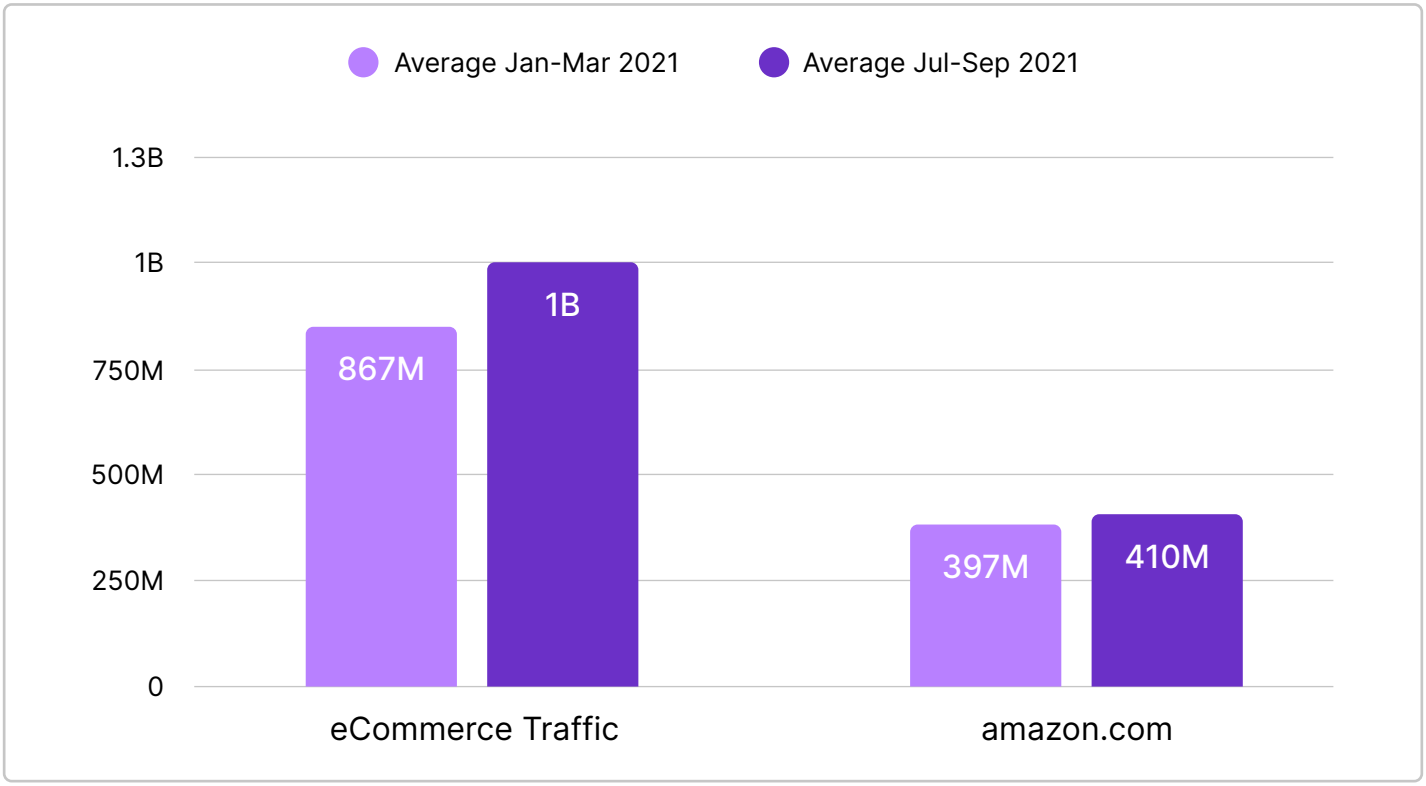
Takeaway

The decrease in organic traffic appeared to be a return to normal after the pandemic. With the most significant downward trend coming in correlation with the worldwide increase in COVID inoculations (see graph below), there is a strong case to say that the fall in organic eCommerce traffic was a result of people returning to normal life. Indeed, in many cases, it may have been caused by a return to a brick-and-mortar shopping experience.

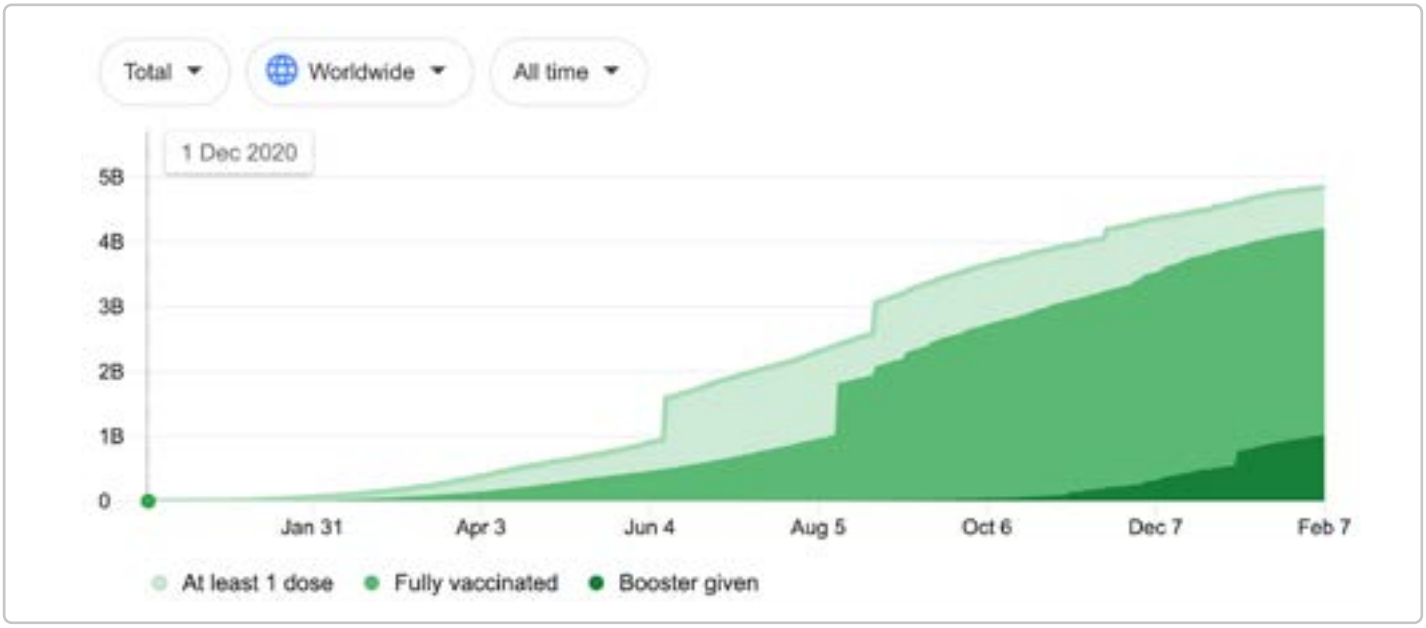
This is further supported by the traffic trends seen in 2020. Organic traffic significantly increased in April 2020 after the outbreak of COVID-19 officially became a pandemic.

In fact, the first three months of 2020 saw 15% less organic traffic on eCommerce sites than what was recorded between July and September 2021.

Organic Traffic: Trends of 2020 vs 2021



This could be an indication that the baseline for organic traffic in eCommerce has been raised as a result of the pandemic. If traffic stabilizes in this fashion, such businesses could be enjoying 15% more traffic than they were before 2020.



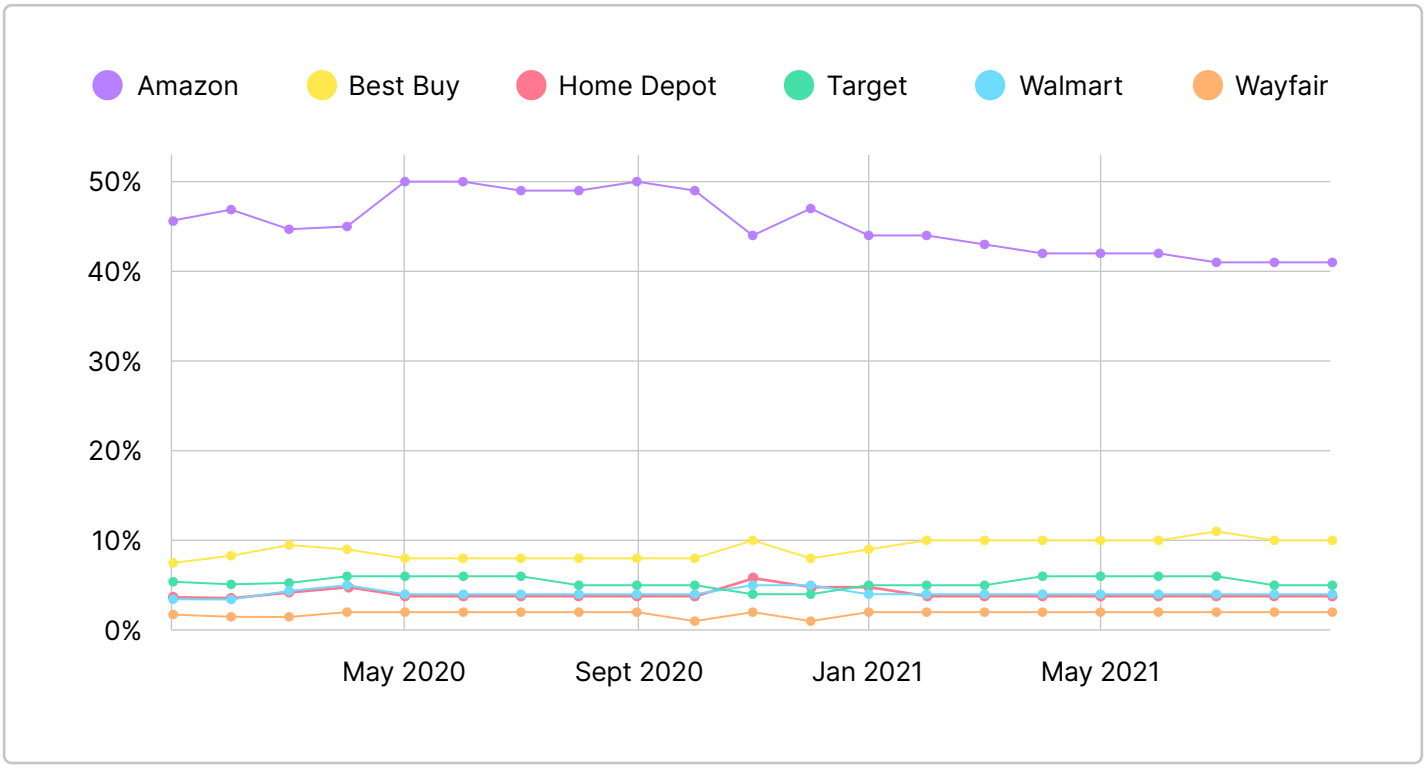
Looking at Amazon's Competitors' Market Share

One pressing question is whether the organic market share Amazon lost moved to one of its top competitors, or got divided up across the industry overall?

If we look at some of Amazon's top organic competitors, including Best Buy, Home Depot, Target, and Walmart, we see that the only one that experienced a slight trajectory shift was Walmart.

Amazon's vs Competitors: Market Share

According to Search Traffic Data



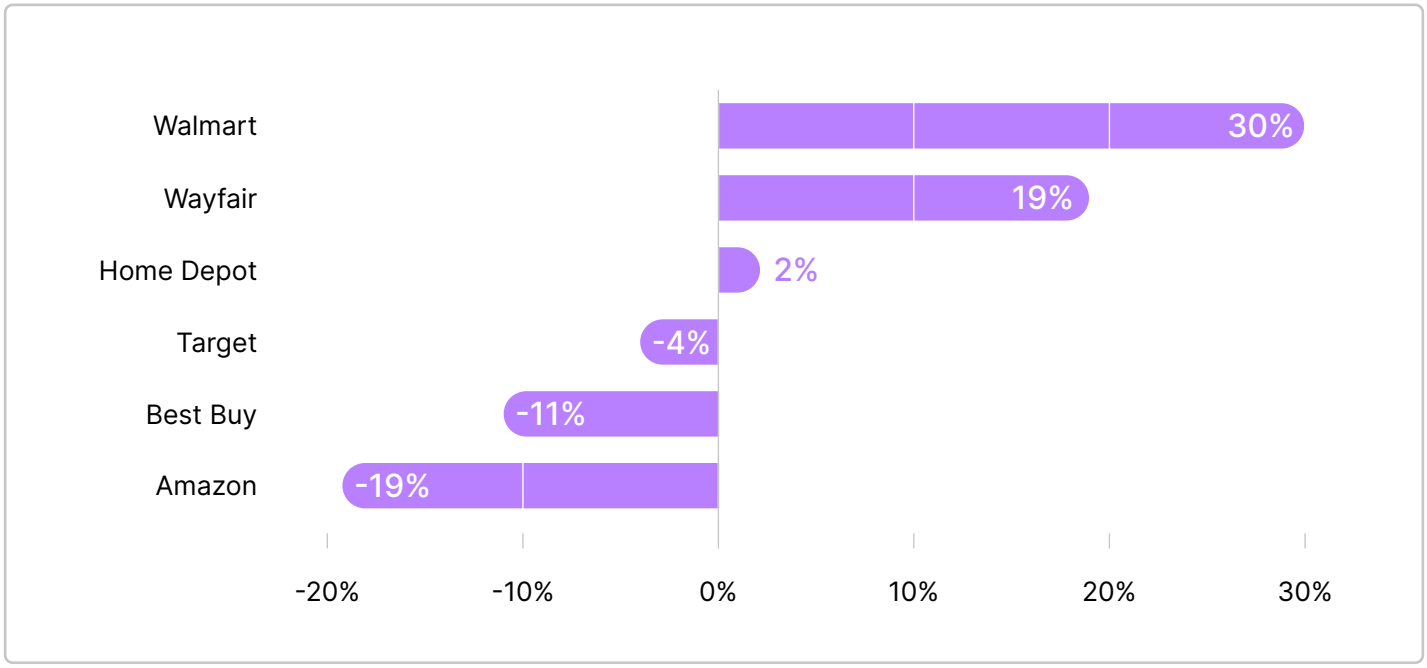
While Walmart did see its market share grow circa May 2020, the other eCommerce players saw no noticeable increase in organic market share (the chart above shows an increased market share for Home Depot and Wayfair, but those gains had eroded by the end of the data period).

It was not until February 2021 that we saw Walmart start to have a market share generally above 10%, with the exception of November 2020 when it may have benefited from Black Friday.

If we look at a 30-day period year-on-year, we can see that Walmart was the only retailer to see a significant growth trend in organic market share since 2020:

Ecommerce Market Share Change

September 2020 vs September 2021



This suggests that Walmart is Amazon's greatest organic threat, but this must be put into the wider context of Amazon already holding 300% more of the market share than Walmart.

Overall, the changes in market share were not significant enough to determine that a specific competitor overly gained from Amazon's loss; they merely indicate that the market share was instead spread across the industry.

Analyzing Amazon's Presence on the Google SERP (Organic & Paid)

Organic SERP

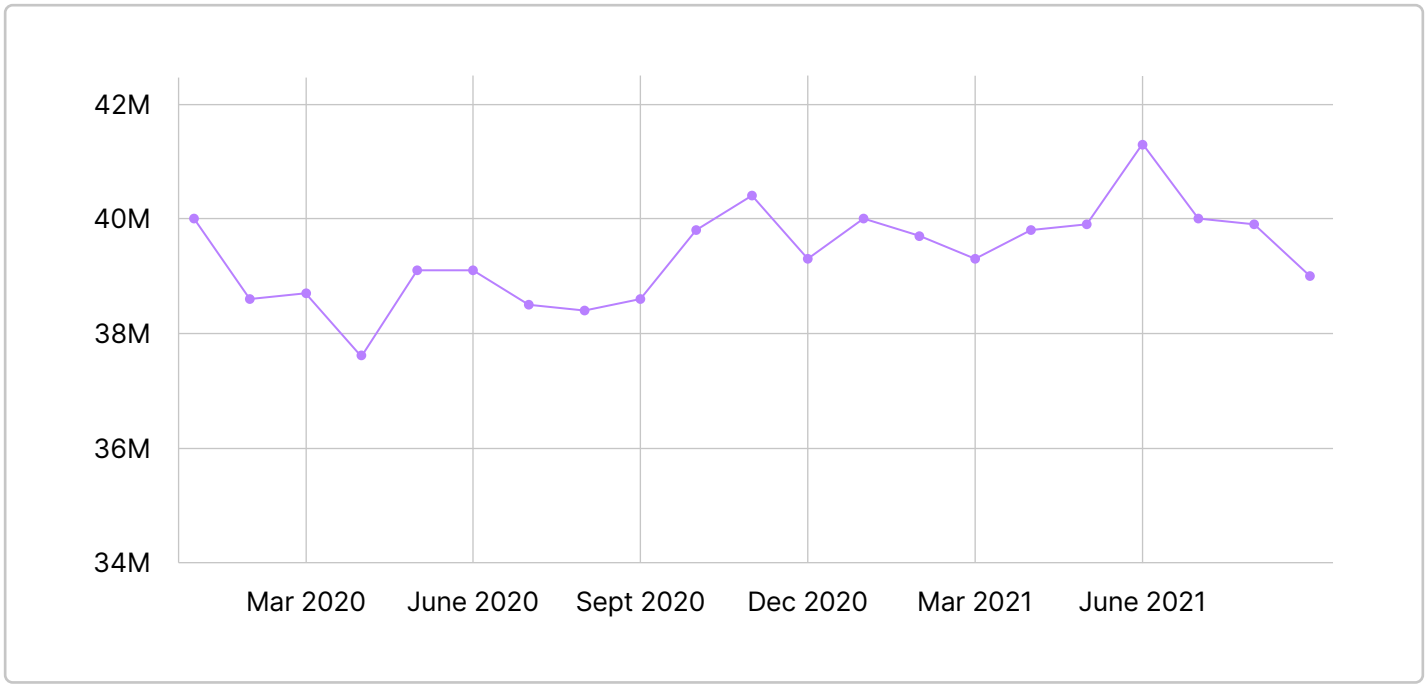
Throughout 2020, Amazon's average organic market share stood at 47%. This number dropped to just over 42% in 2021.

There are many possible reasons why Amazon lost this market share, from loss of keyword rankings for its most significant keywords to the improved organic presence of some of its competitors.

When we analyze Amazon's rankings among the top 10 results in 2020 vs 2021, we see there was no change in the number of keywords ranking among the top 10, but there was a marginal increase of roughly 2%. This would suggest that Amazon's loss of organic market share, which is measured in traffic, was not due to overall ranking loss.

Number of Keywords Where amazon.com Ranks in Top 10

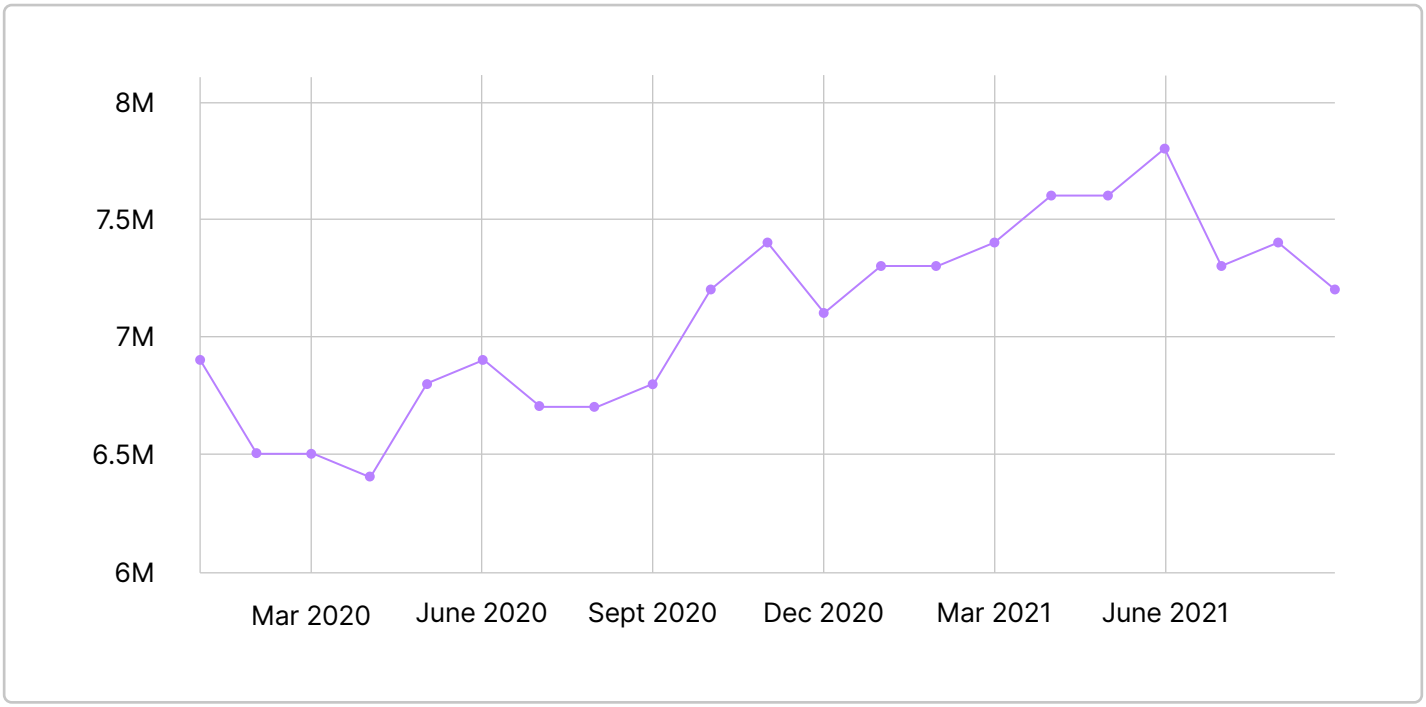
Desktop Data



When we look at Amazon's performance in terms of ranking in the top spot on the SERPs, the eCommerce giant saw an increase of 8.78% in the number of keywords that ranked number one in 2021.

Number of Keywords Where amazon.com Ranks #1

Desktop Data



Takeaway

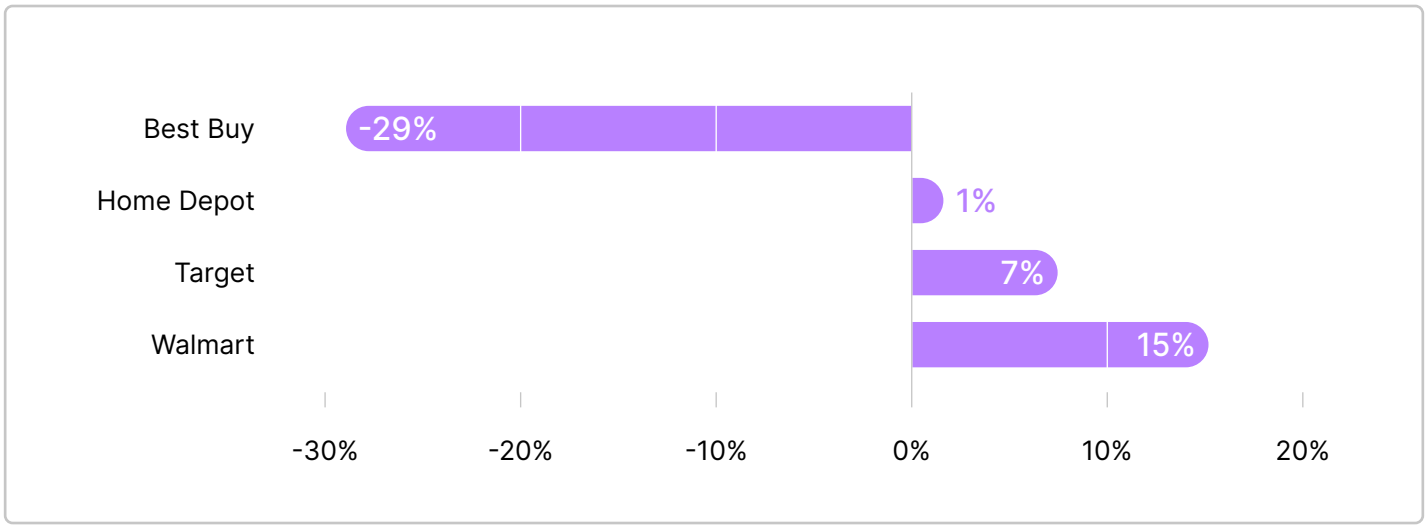
The total number of keywords for which Amazon ranks in the top 10 on the Google SERP is roughly 40M, and the total number of keywords for which it ranks number one is roughly 7.5M. With this in mind, it would appear that the aforementioned loss of organic traffic market share was most likely due to the increased presence of its competitors across the whole market.

Amazon's Competitors' Keyword Performance

For the next stage of our analysis, we looked at whether or not any of Amazon's competitors experienced significant growth from a rankings perspective.

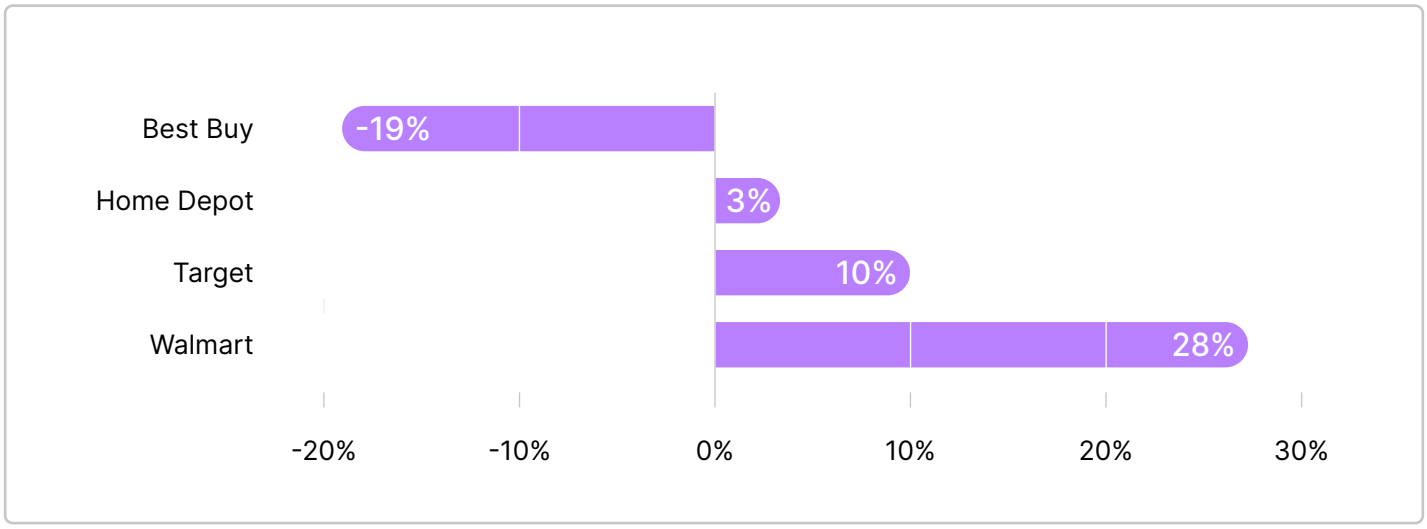
To break this down, we looked at the number of top-ranked keywords that Amazon's top competitors gained or lost by percentage in 2021 versus 2020.

Rank Losses/Gains Year-On-Year



We also looked at the number of top-10 keywords that Amazon's top competitors gained or lost in the same time period.

Top 10 Rank Losses/Gains Year-On-Year



It seemed that a lot of Walmart's market share increases came as a result of its organic efforts.

This stands in contrast to Target, which saw the number of ranking keywords increase in 2021 relative to 2020, but did not see a market share increase. This may have been because Target's new top-10 rankings were not for terms that tended to drive traffic to the site.

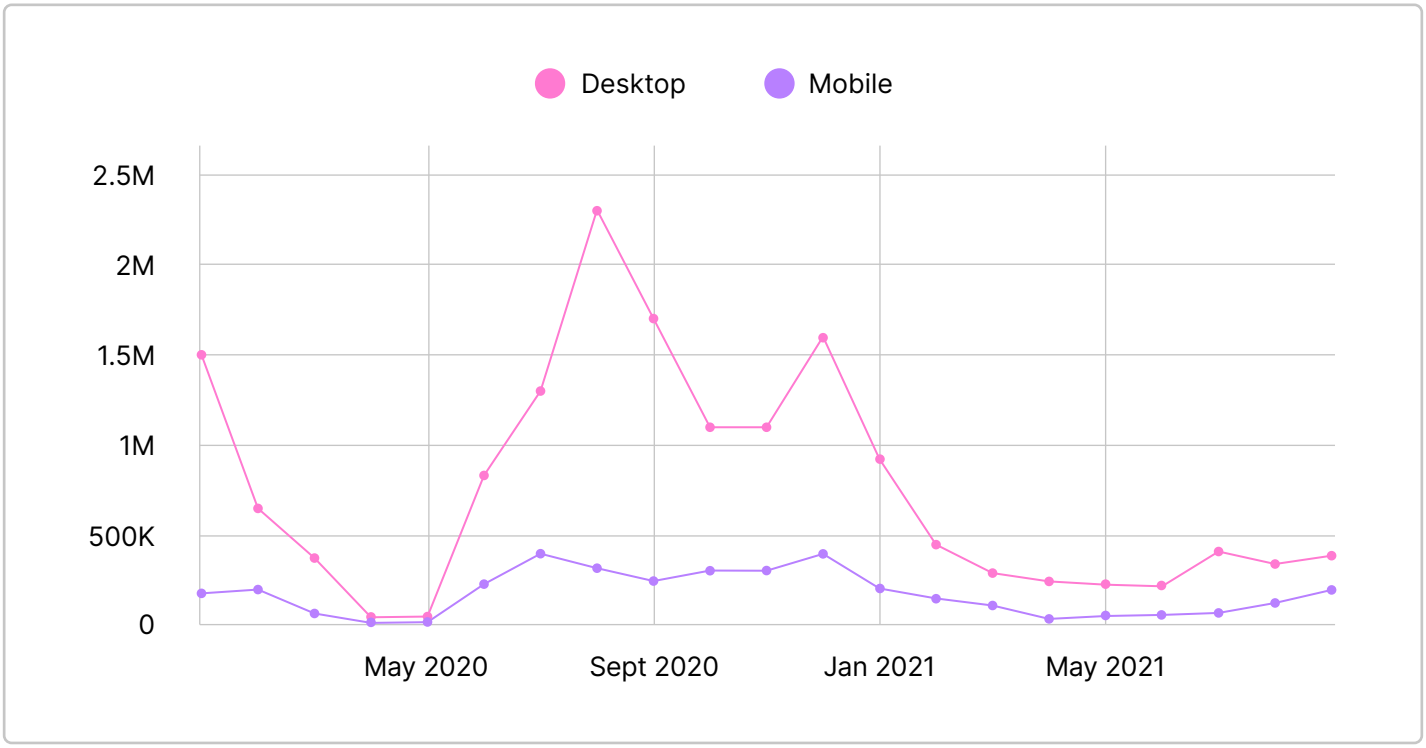
Paid SERP

Amazon's behavior on Google's paid SERP was evident in both a dramatic decrease in its focus on Google Search Ads and a dramatic increase in its emphasis on Google's PLAs.

Amazon's appearance in the Search Ads space decreased year-on-year by 62.2% on desktop and 48.5% on mobile.

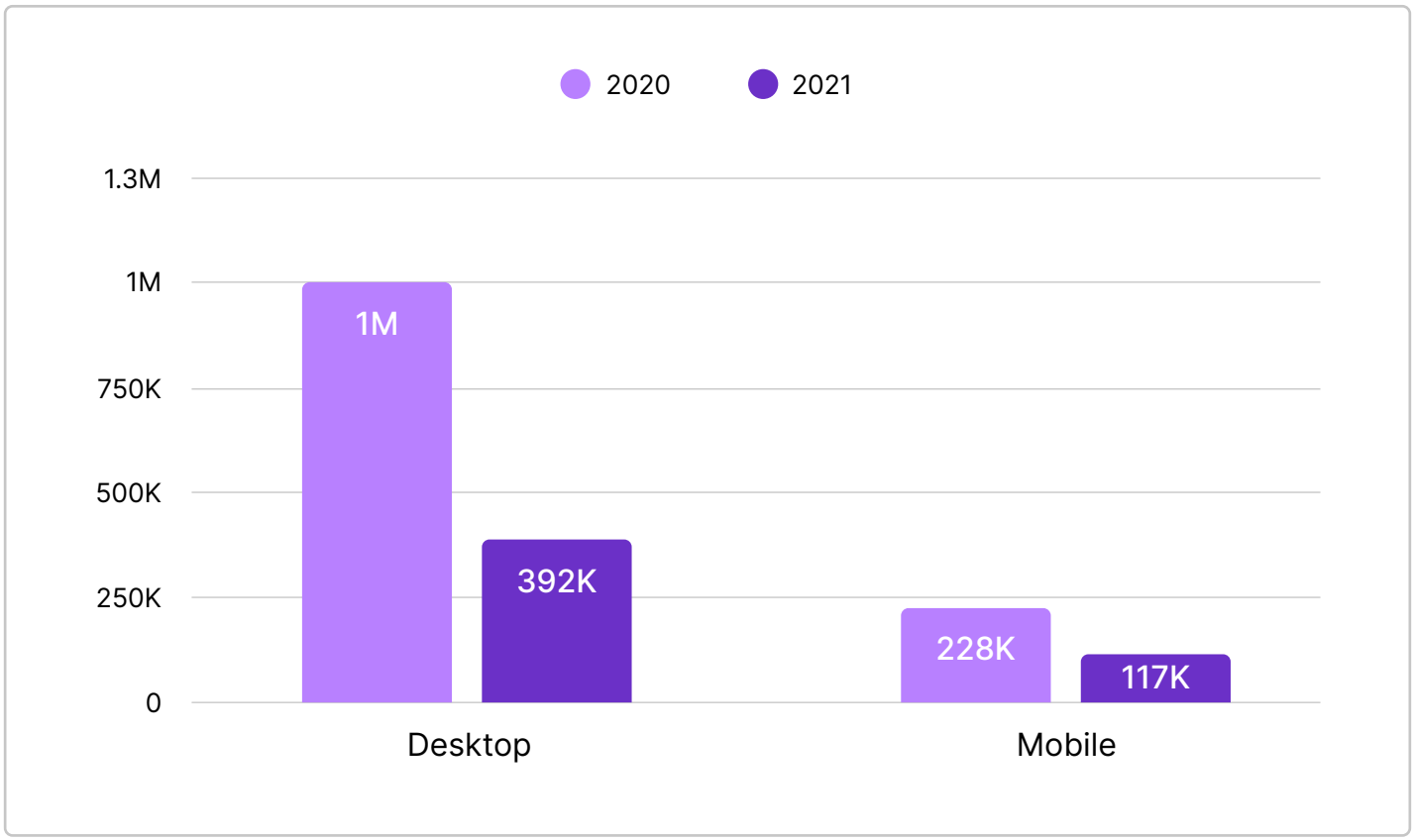
Specifically, the average number of desktop Search Ads Amazon appeared in throughout 2020 was 1,036,786, but it was only 391,795 in 2021.

Number of amazon.com Search Ads



Amazon's appearance within mobile Search Ads has traditionally been significantly lower on mobile. In 2021, Amazon's behavior in this regard became slightly more aligned as it appeared in 70% more desktop Search Ads in 2021, which stands in comparison to 78% in 2020.

Average Number of amazon.com Search Ads



Still, Amazon saw its mobile Search Ads appearances drop from 227,918 in 2020 to just 117,350 in 2021—a 48.5% decrease.

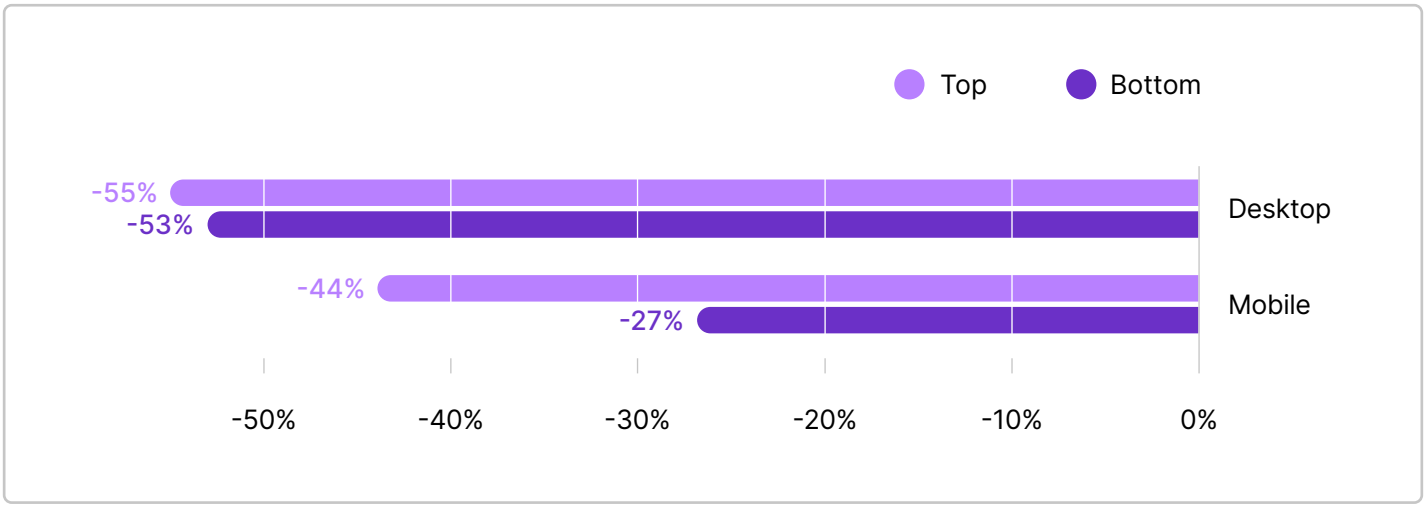
As the earlier graph shows, there was a tremendous drop-off in Amazon's Search Ads in April and May 2020. This was due to Amazon's initial overload as the world shifted to be digital-only as a result of the pandemic. Even with such low numbers during that period, Amazon still appeared in far more Search Ads in 2020 than in 2021.

However, it is important to note that Search Ad display rates were down for everyone. According to our data, Google Ads at the top of the SERP were down by:

↓ 55% on desktop
↓ 44% on mobile

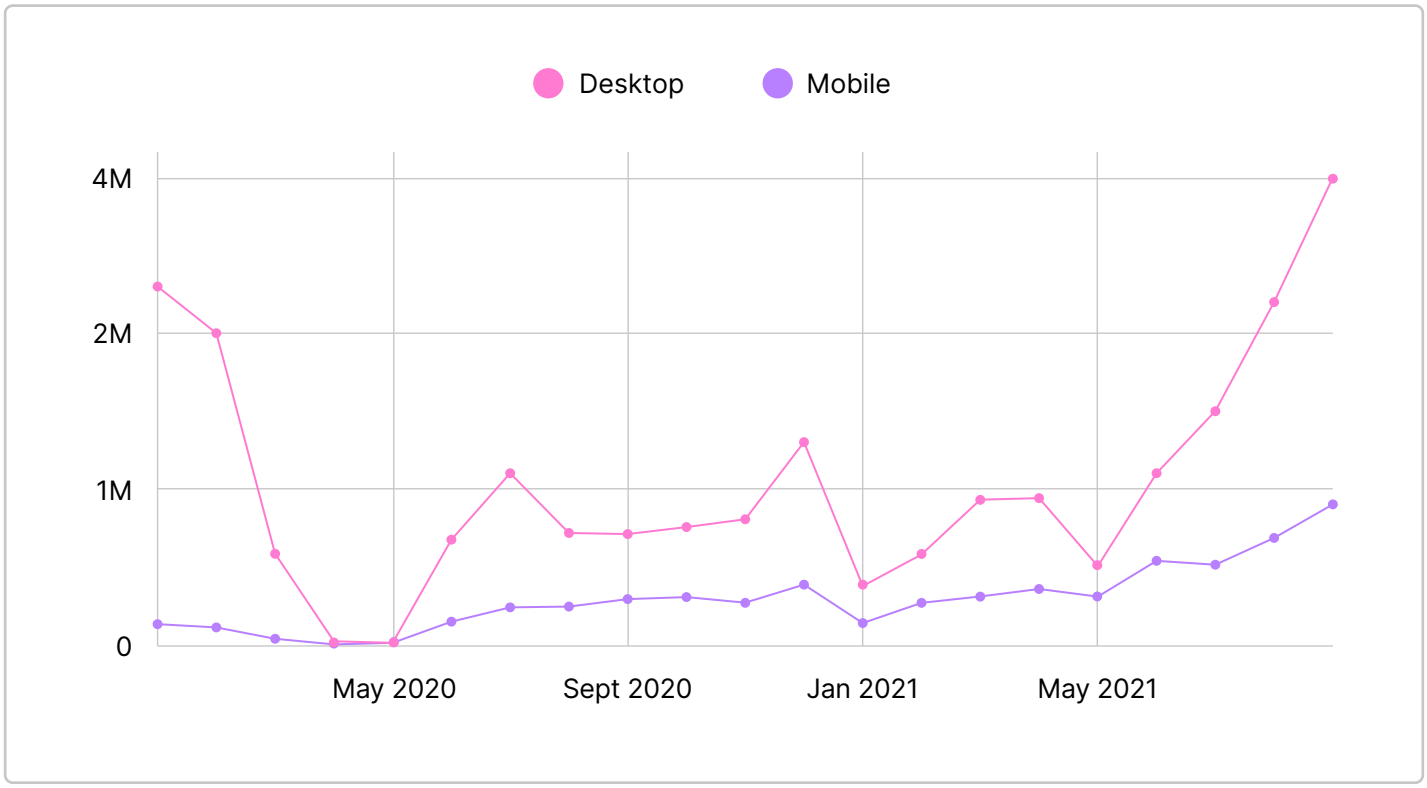
Percentage Change of Ads Occurrences on SERP

2020 vs 2021



While there was a lack of emphasis on Search Ads for Amazon, there was a far stronger focus on PLAs in 2021, which indicates the continued importance of paid activity to the online giant.

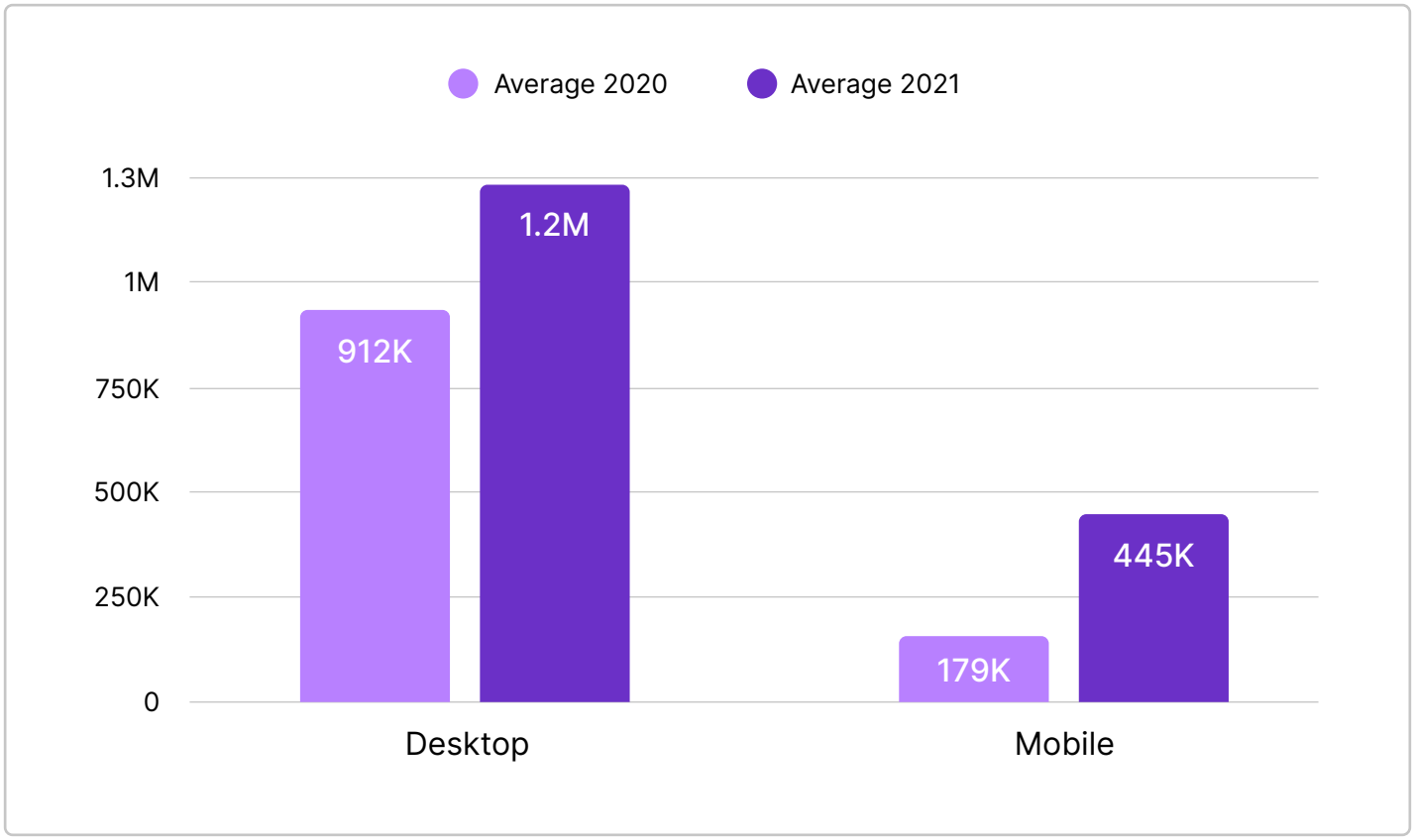
Number of amazon.com PLAs



On average, Amazon appeared in over 1M PLAs on desktop in 2021 and nearly 500K on mobile.

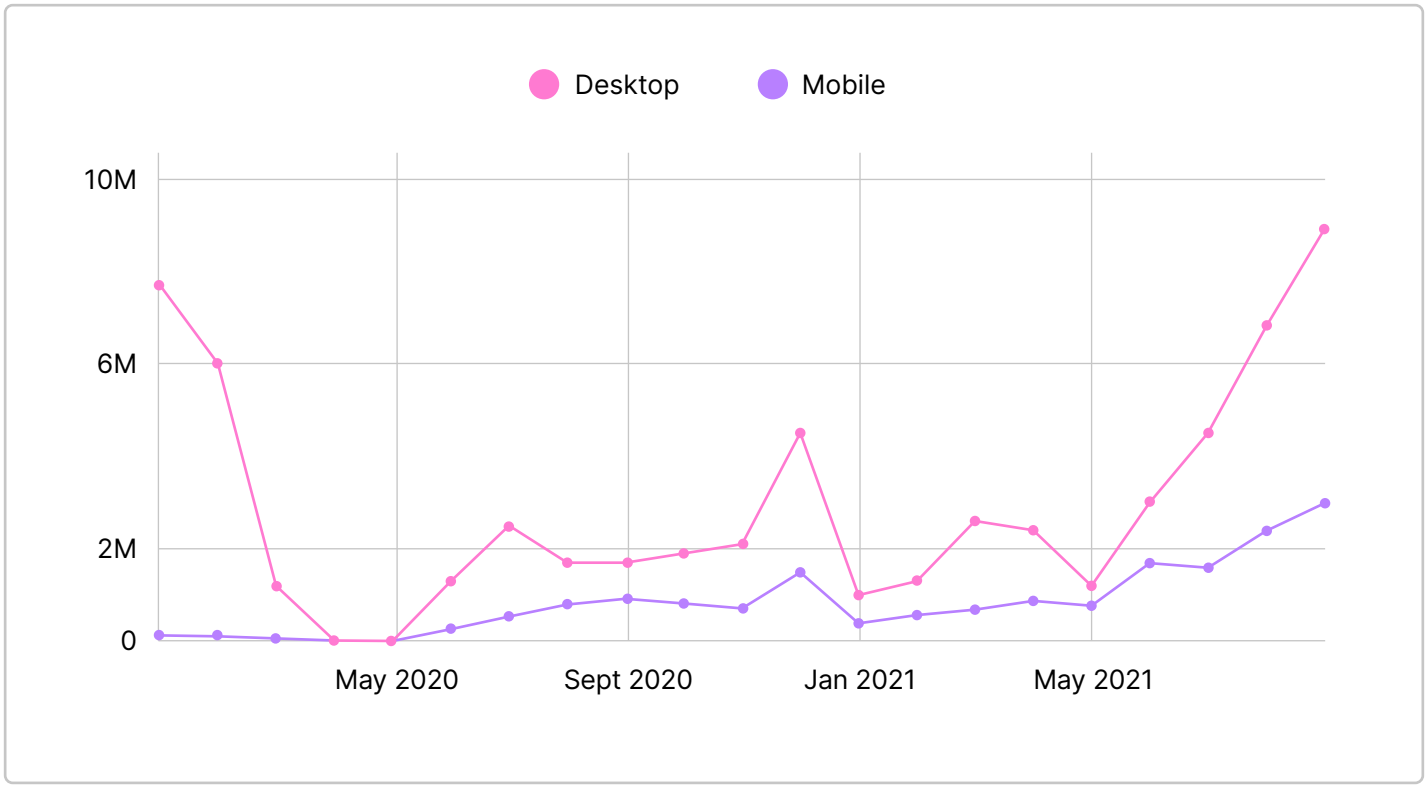
Compared to 2020, Amazon appeared in 36.8% more desktop PLAs and a whopping 148.5% more mobile PLAs in 2021.

Number of amazon.com PLAs



The number of keywords that took Amazon into the PLA went up from an average of 2.55M on desktop in 2020 to 3.54M. On mobile, it went from 489K to 1.33M PLA keywords.

Number of amazon.com PLA Keywords



However, here we have to temper the data with the drop in PLAs that occurred for two months in 2020, as this was an unexpected event. Even after removing the significant drop in PLA appearances and keywords that occurred in April and May 2020, we get:

- A **13.98% increase** in desktop PLA appearances
- A **107.06% increase** in mobile PLA appearances
- A **15.31% increase** in the number of keywords producing PLAs for Amazon on desktop
- A **126.30% increase** in the number of keywords producing PLAs for Amazon on mobile

Those are still extremely significant shifts in Amazon's paid SERP landscape.

The display rates for PLAs were actually down across the board by 52% on desktop and 34% on mobile in 2021, which makes it all the more significant that Amazon managed to appear in so many more PLAs.

Takeaway

The increase in Amazon's PLA numbers across desktop and mobile is most substantial as the summer months of 2021 set it. Thus, are we looking at a continuing upward trend for Amazon PLAs in the months to come? Is this Amazon's response to Google's increased focus on its shopping properties?

Amazon's increased emphasis on mobile is also significant to note. Is this a reflection of Amazon undervaluing the mobile user historically or is Amazon responding to a market shift? That is, is Amazon noticing that users are less averse to converting on mobile relative to the past (as mobile lacks the same sort of "fuller" viewport that might entice more conversion on dekstop).

State of Local

This section covers the local SEO landscape. As opposed to purely focusing on "traditional" local SEO information, we also analyzed how businesses reacted to COVID-19 by analyzing the attributes found within local listings.

Methodology

We took data for 12,933 locations of 9,751 different brands. These data include numbers of reviews, average ratings, and information about Google Business Profile attributes usage.

To begin with, we analyzed 13K random local listings in order to characterize and categorize them by niche industry. We categorized them not according to business categories in Google Business Profile, but according to a more universal listing of industries.

Of the listings analyzed, there was a clear local disposition towards:

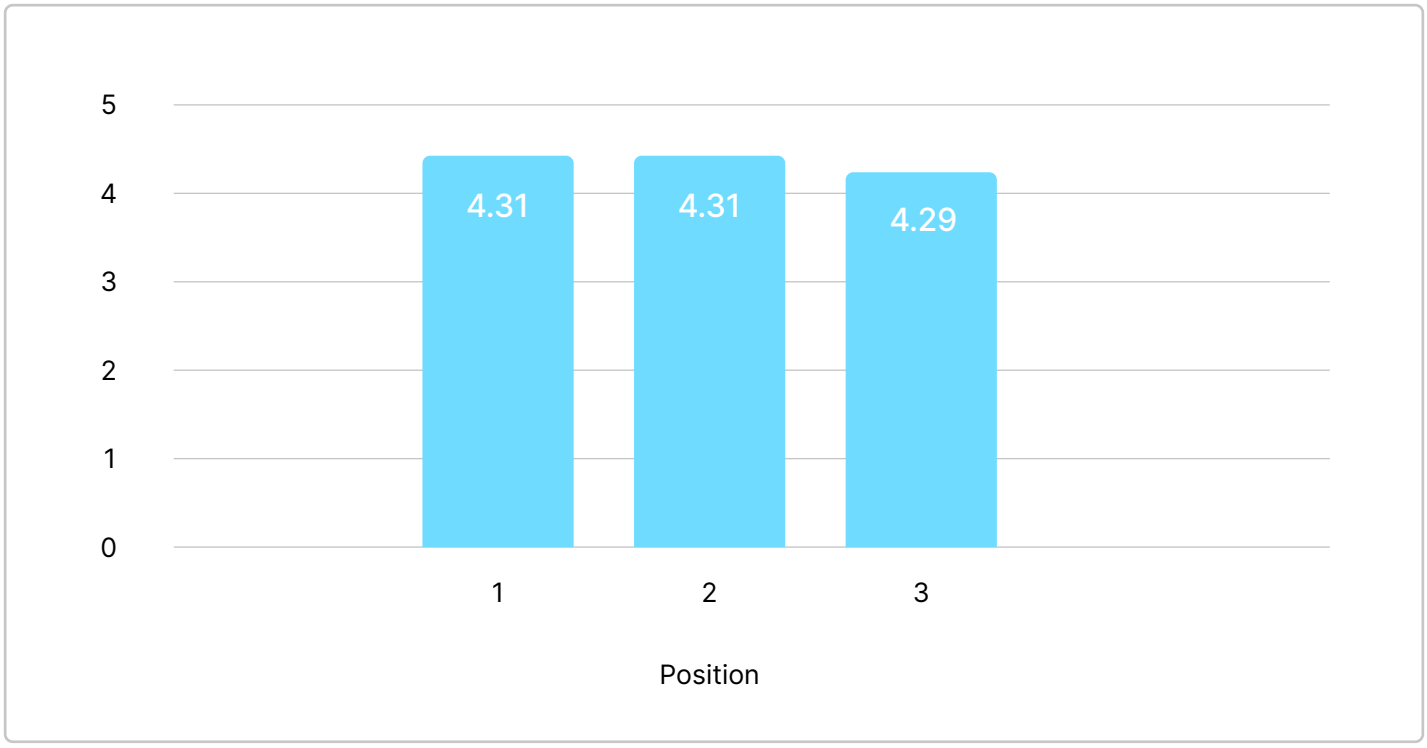
- Contractors
- Health & Medicine providers
- Legal Services
- Business Services
- Home & Garden retail outlets

Number of Reviews & Average Rating

Overall, we analyzed 5,624 keywords that were strongly related to local businesses to see how the top listings on both Google Maps and in the Local Pack stacked up in terms of reviews. The top listings on Google Maps had an average review rating above four.

Average Rating

Google Maps

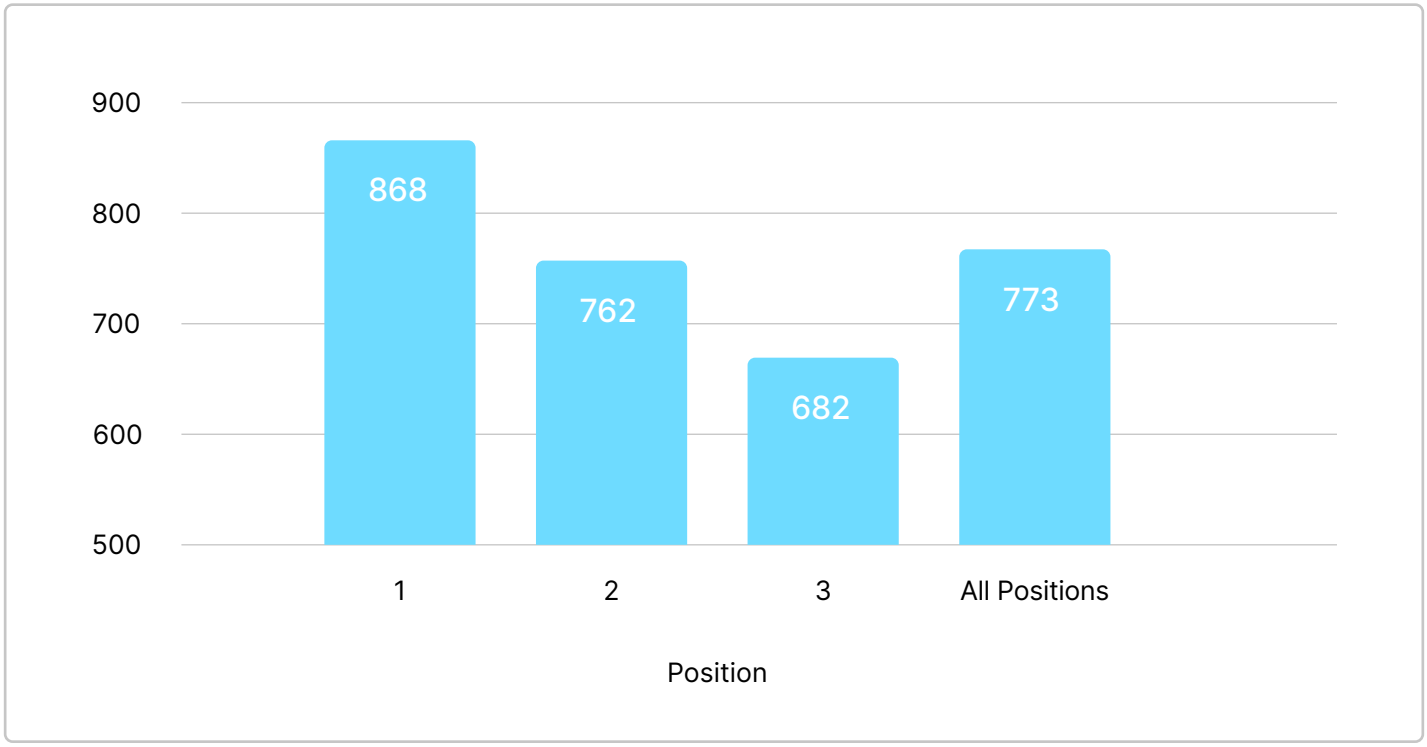


This is very similar to the average rating of the top Local Pack listings, although the average rating was slightly higher there.

The number of reviews contained within the top local listings was perhaps even more pertinent. On Google Maps, the top-ranking listing contained well over 800 reviews.

Average Numbers of Reviews

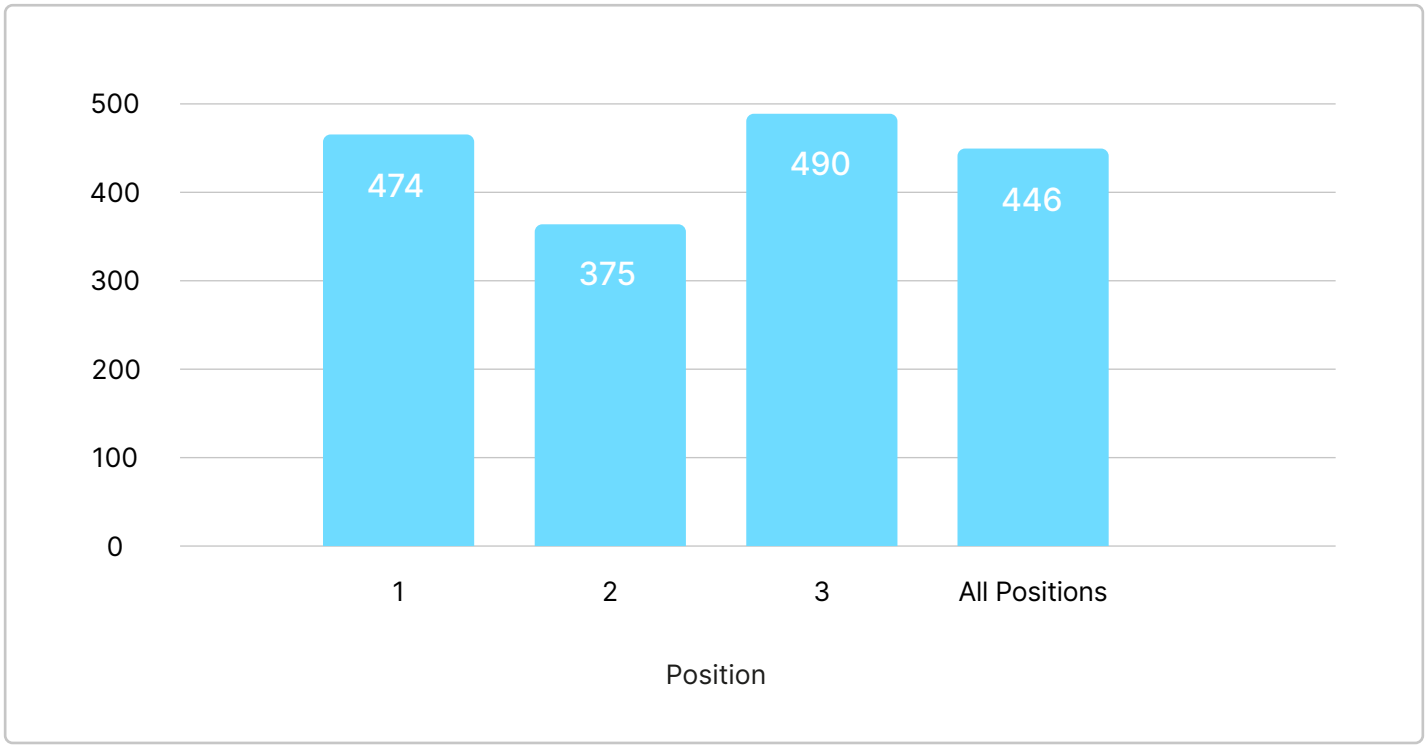
Google Maps



By comparison, the number of reviews within the top Local Pack listing was almost half of that seen within Google Maps.

Average Numbers of Reviews

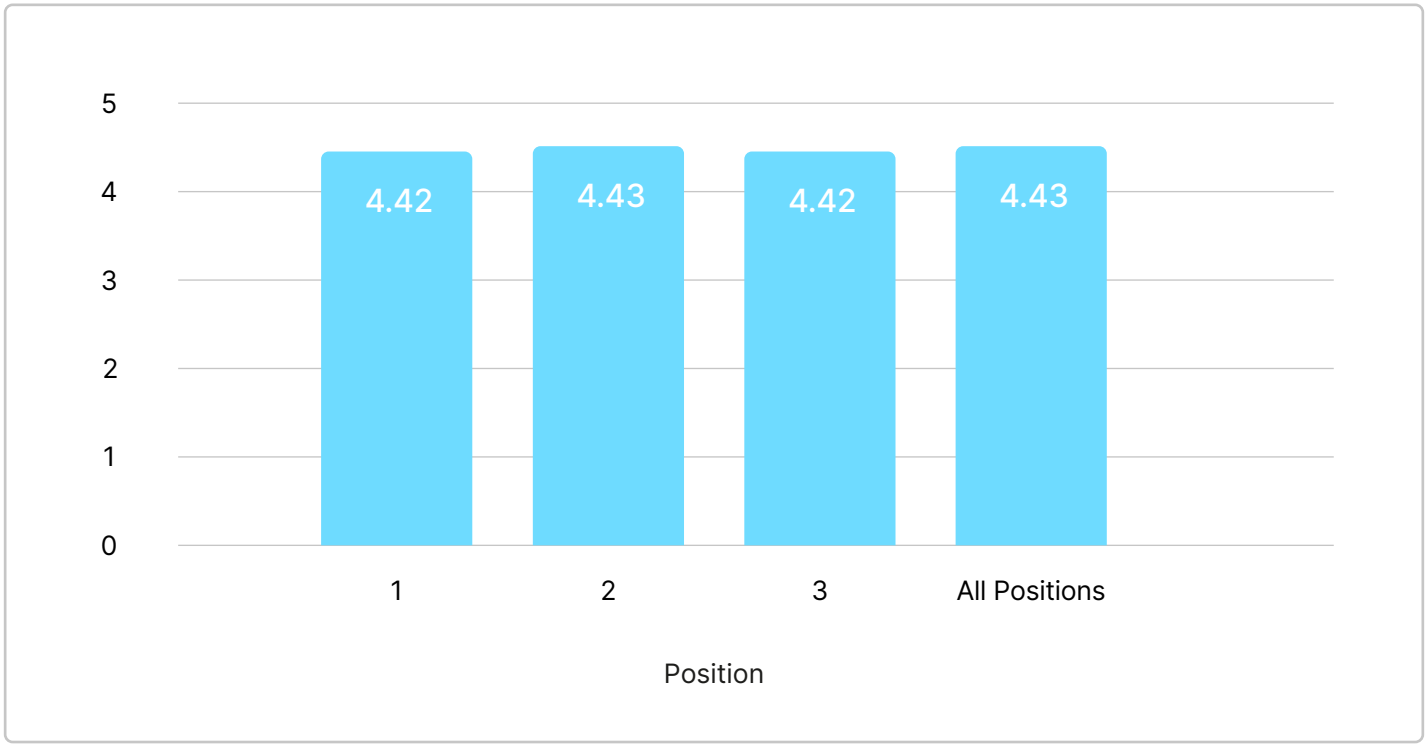
Local Pack (Desktop)



In the Local Pack, the second listing contained significantly fewer reviews than the third listing, but the third listing actually contained more than the first.

Average Rating

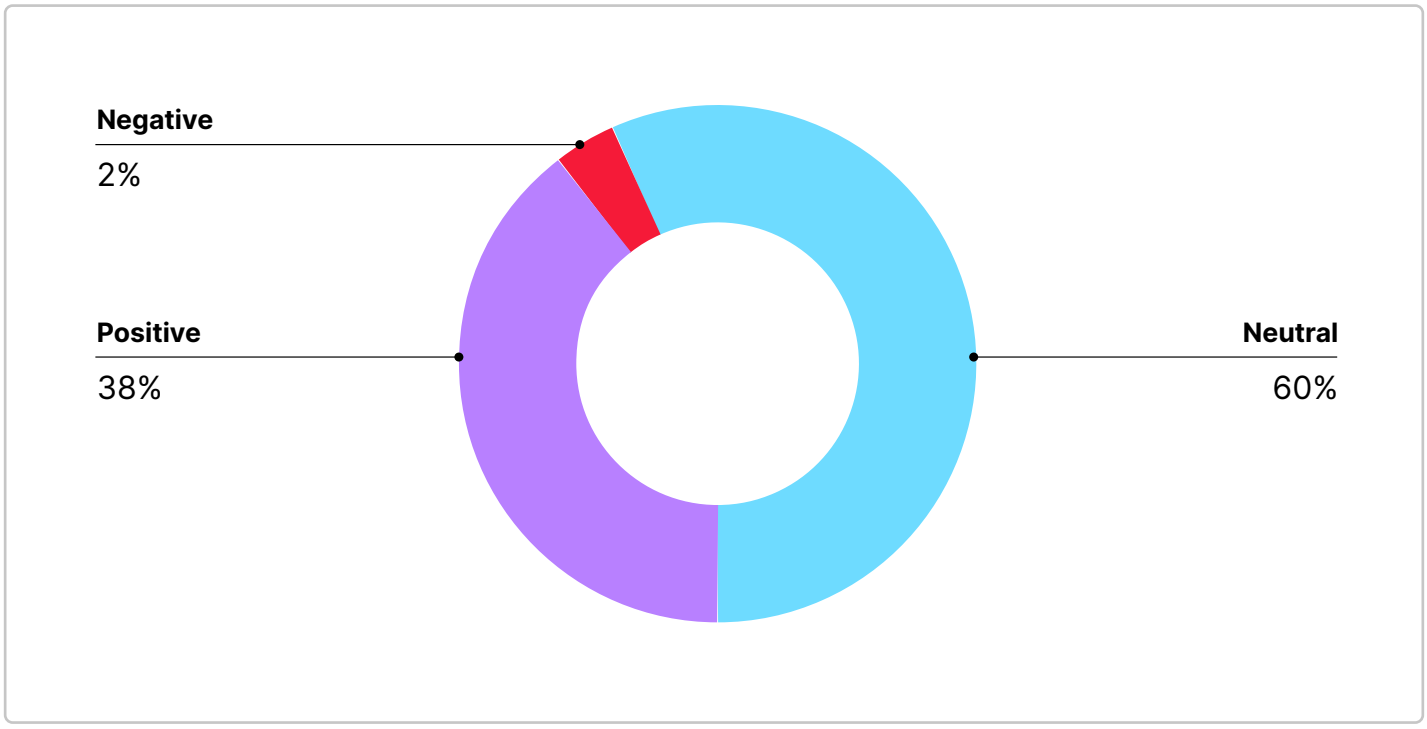
Local Pack (Desktop)



Of these reviews, the vast majority appear to be either positive or of a more neutral nature.

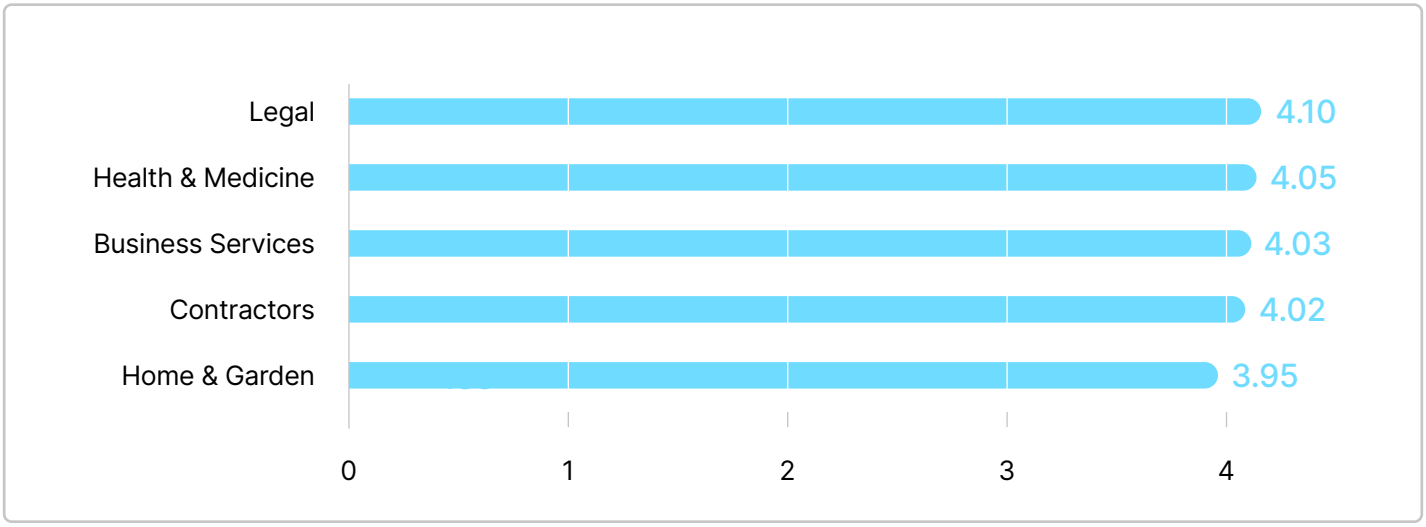
Share of Tone of Voice in Reviews

Local Pack (Desktop)

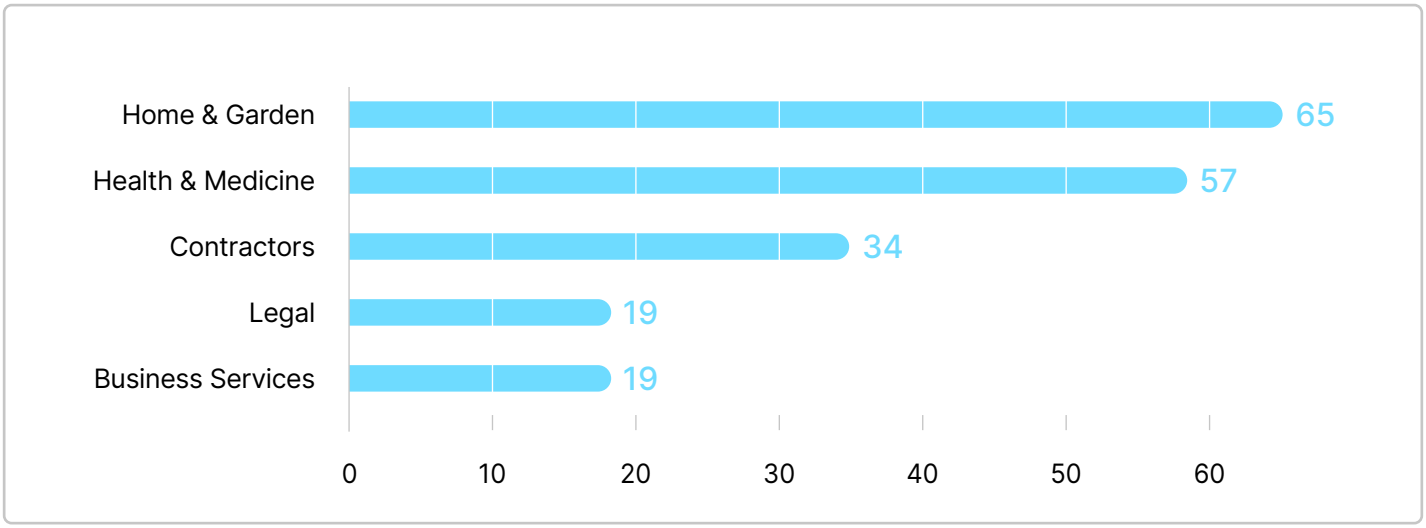


Only 2% of the reviews found within the Local Pack listings were classified as negative. This indicates that top listings typically contain reviews that are overly positive or of a more factual nature, i.e. neither positive nor negative, but merely statements of fact.

Average Rating by Category



Average Number of Reviews by Category



When looking at the top five categories in our data set, we saw that, while all categories had an average rating of almost four or above, the average number of reviews amongst businesses differed greatly. Both Legal and Business Services had an average number of reviews that fell below 20, while Home & Garden businesses averaged at 65.

How Close Were Local Listings to the Searcher in 2021?

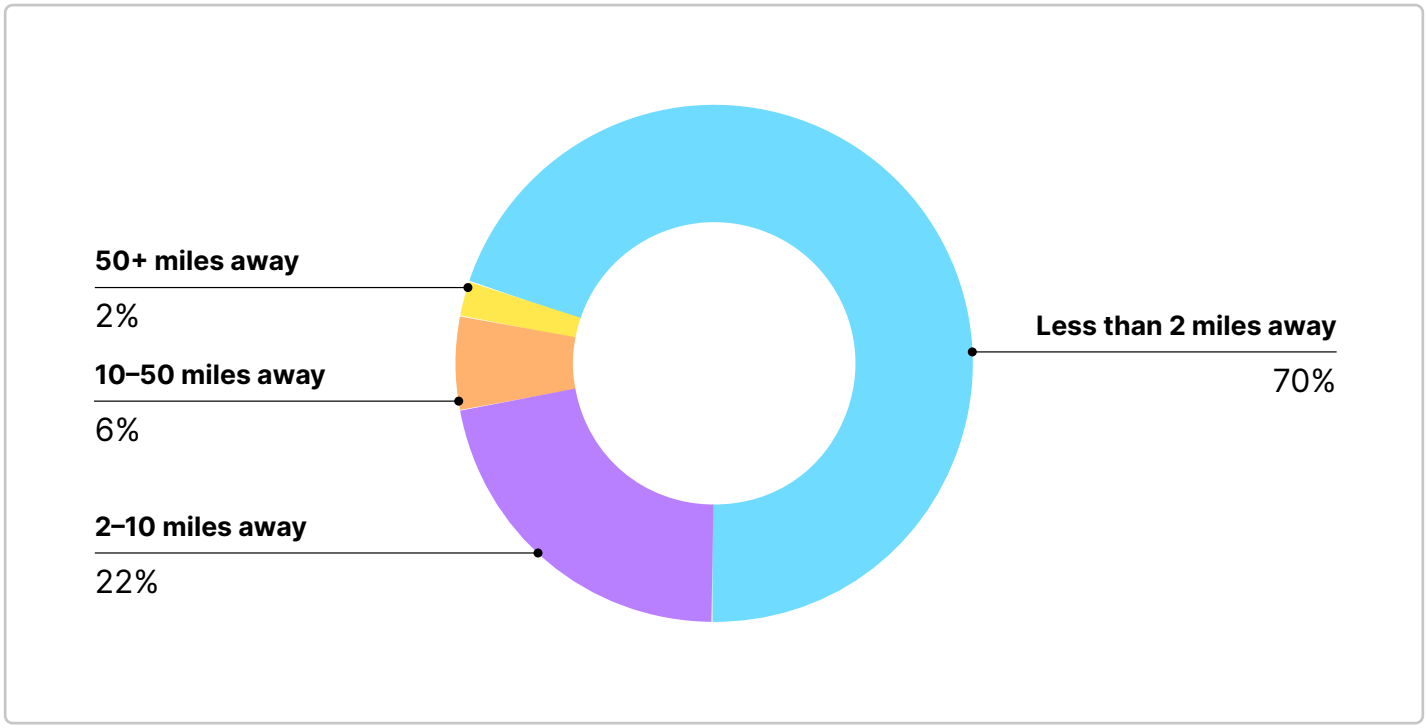
One of the major questions surrounding local SEO is the usefulness of listings Google shows users. Simply, on average, how close to the searcher are the locations Google offers in its local results? The implications of this are obvious and pertinent to any local business.

To investigate this, we analyzed the results shown within both Google Maps and the Local Pack. While the data for reviews differed to an extent between the Local Pack and Google Maps, what we discovered regarding proximity was far more uniform.

Starting with the Local Pack, we saw that the overwhelming majority of local listings shown to users were within two miles of the searcher's location; only 6% of listings were more than 10 miles away.

Distance Distribution

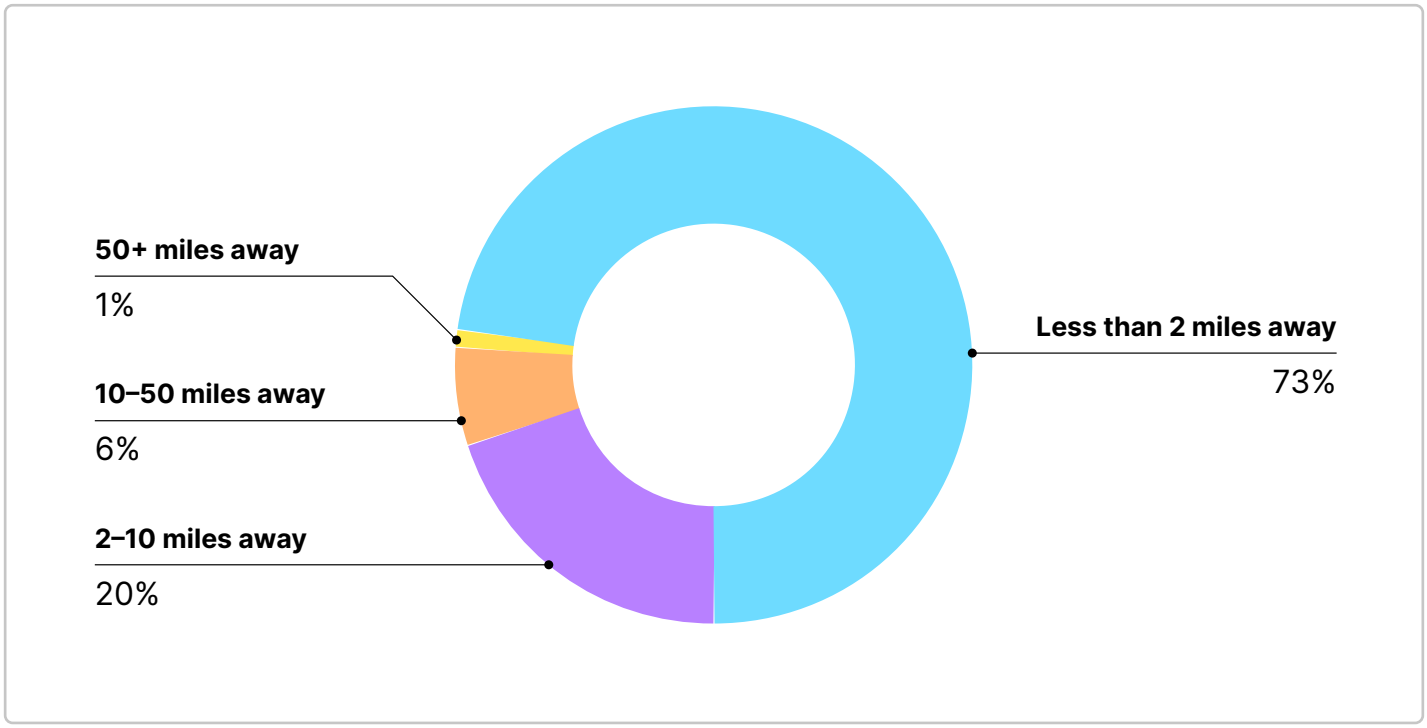
Local Pack (Desktop)



Statistically speaking, this was almost exactly what we saw in Google Maps, too:

Distance Distribution

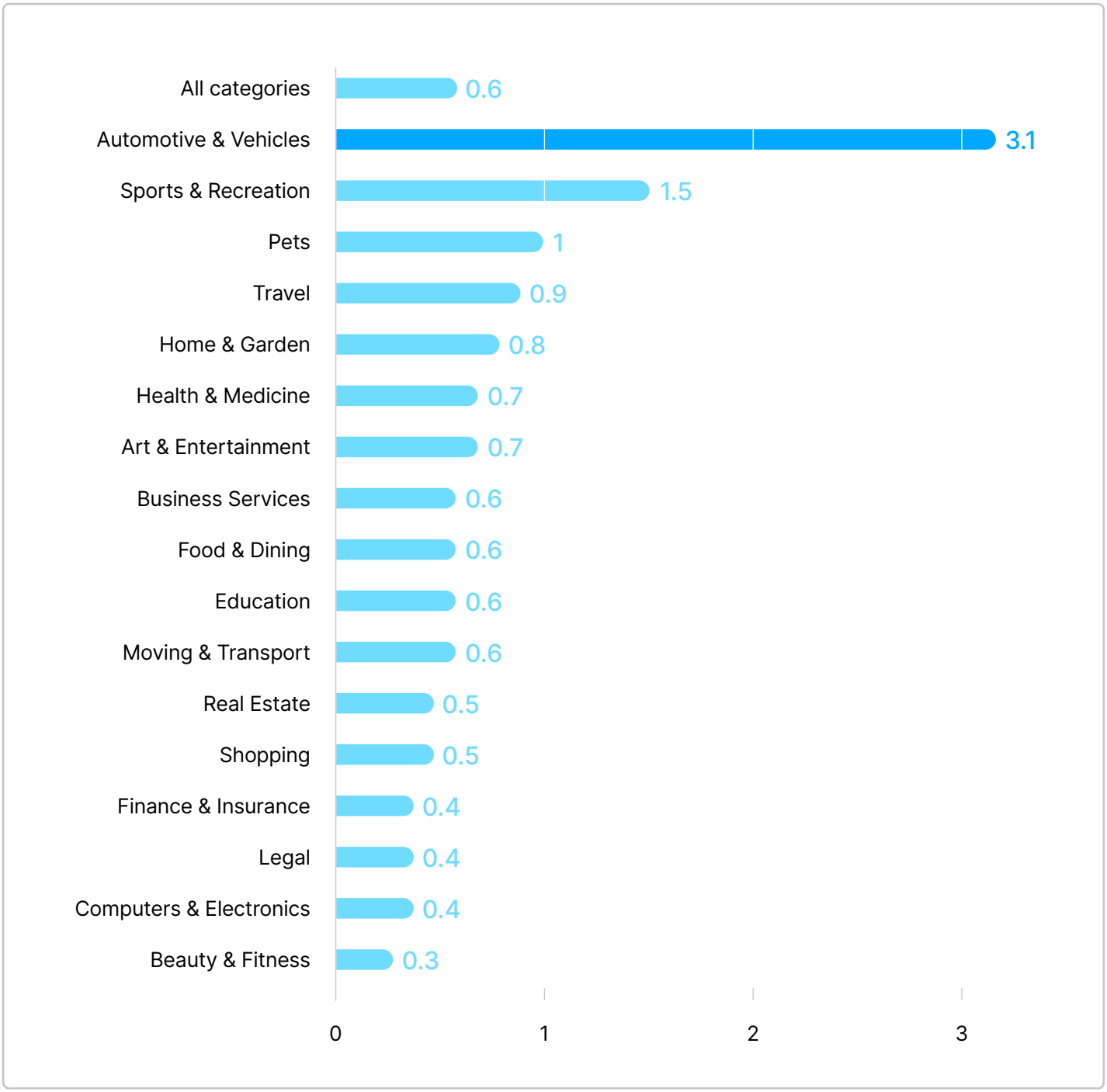
Google Maps



This similarity didn't apply to all verticals and businesses, though. While the median distance across the board was 0.6 miles, some industries diverged from it.

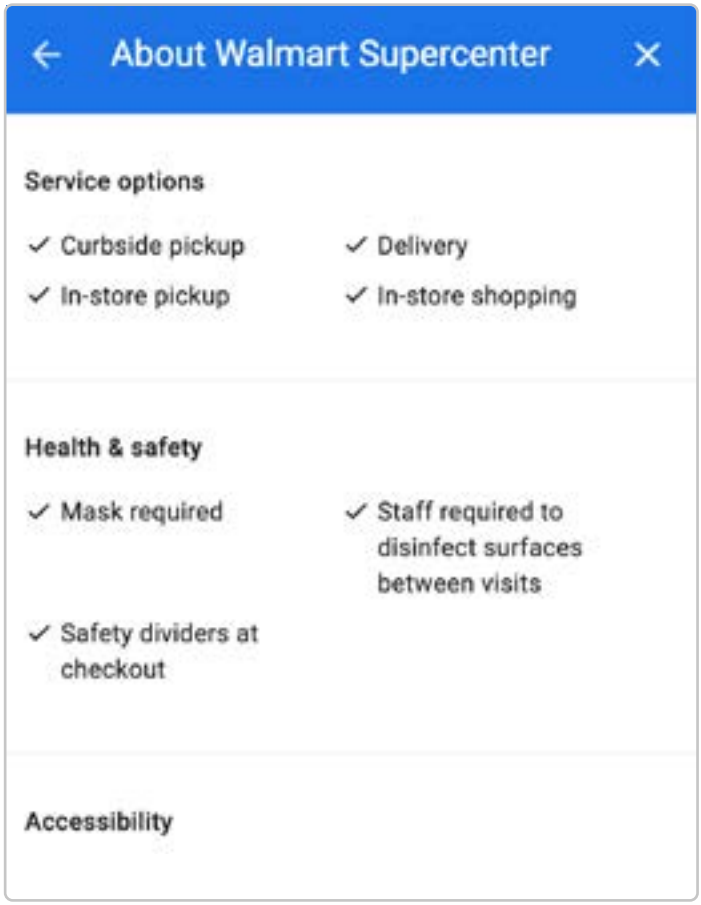
Categories by Distance of Places

Google Maps



The most notable case was with Automotive listings, which had a median distance of 3.1 miles on Google Maps.

An Analysis of the Attributes Found within Google's Local Listings

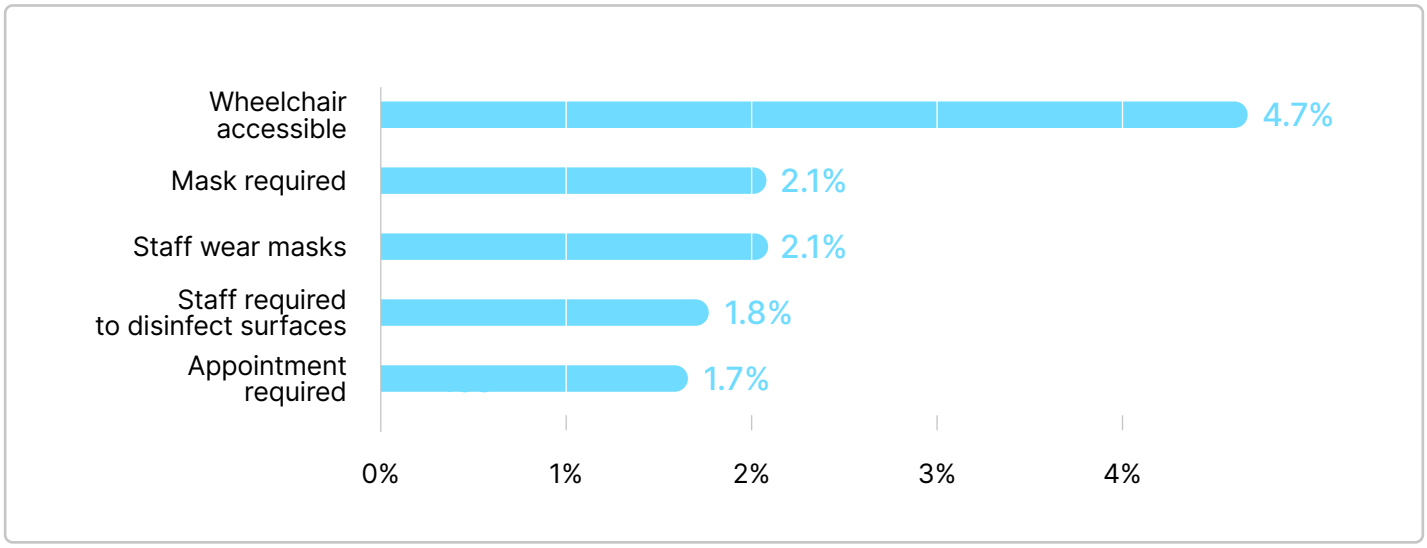


The attributes businesses can use for their profiles in Search and Maps have come to the fore as a result of the COVID-19 pandemic. They have been an important way of informing potential customers of health and safety stances and approaches during such a difficult time, such as mask-wearing requirements and safety partitions at checkouts.

In total, we analyzed 13K local listings to determine which attributes were most common for different business types.

We found that four of the top five most common attributes were COVID-19-related.

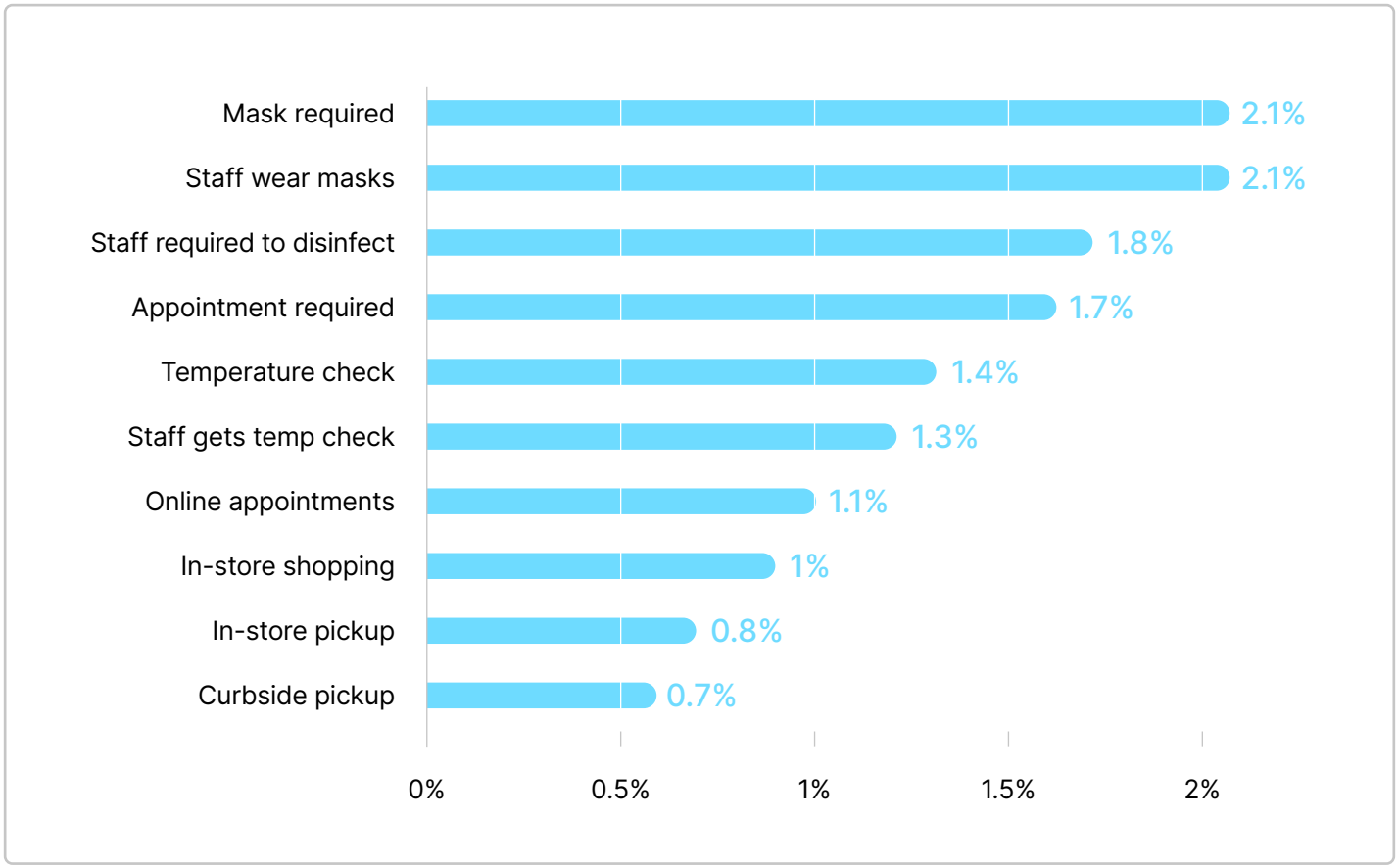
Most Popular GMB Attributes



What stood out here was the number of businesses listing their wheelchair-friendly premises. In fact, this was the most used attribute in 19 out of the 23 different categories we studied, with average usage in 4.7% of listings.

Additionally, the “Appointment required” attribute turned out to be more common than “Curbside pickup,” which didn’t make the top five.

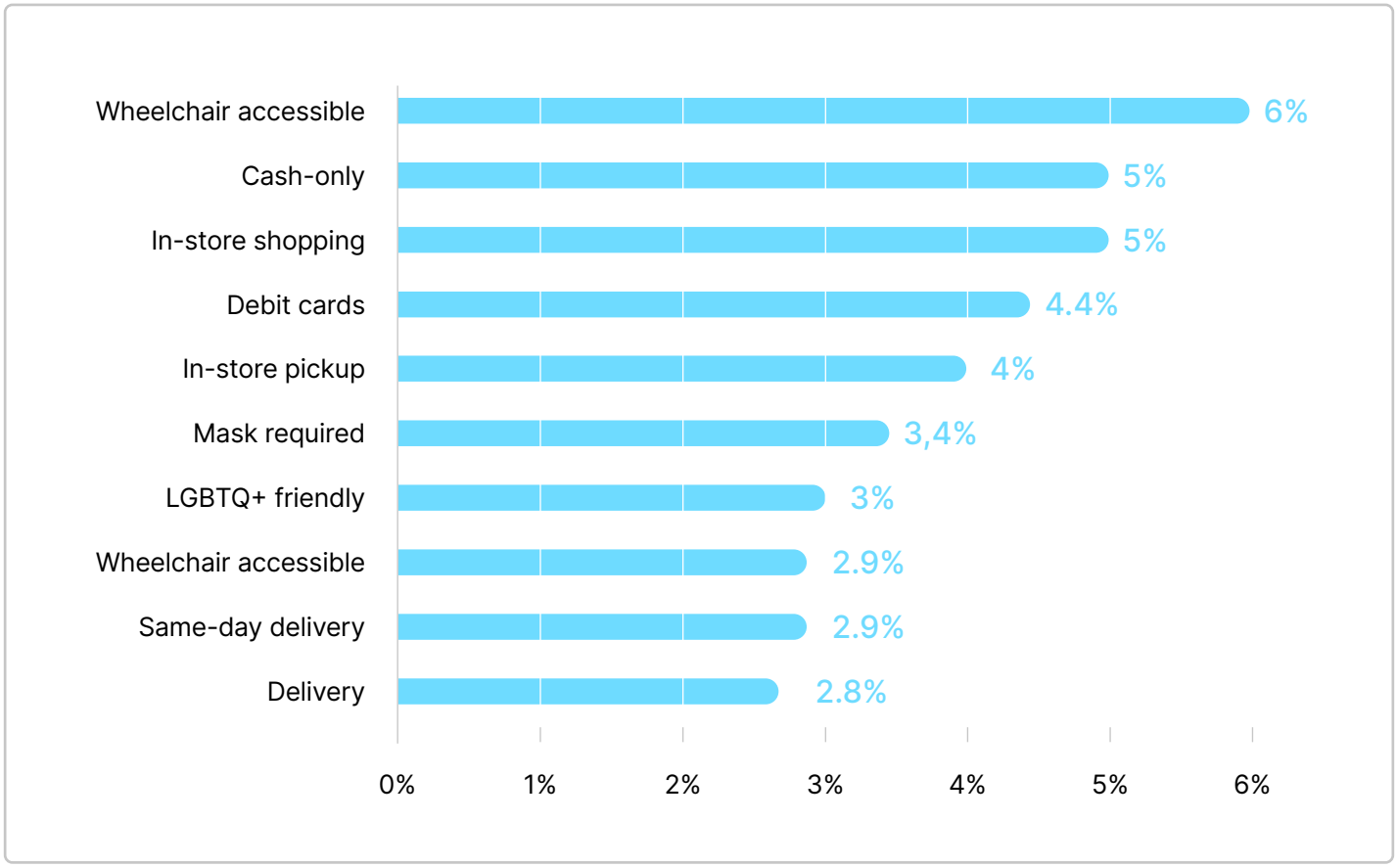
Most Popular COVID-Related GMB Attributes



However, it's important to keep in mind that attribution popularity proved to be industry-specific; there was a great deal of variance in attribution usage throughout our data set.

For example, retail shopping businesses employed more attributes that related to payment methods and the shopping experience itself than others, i.e. “In-store pickup” and “In-store shopping.” These attributes were employed in over 4% of the Shopping listings we analyzed, with a drop-off in the frequency of other attributes thereafter.

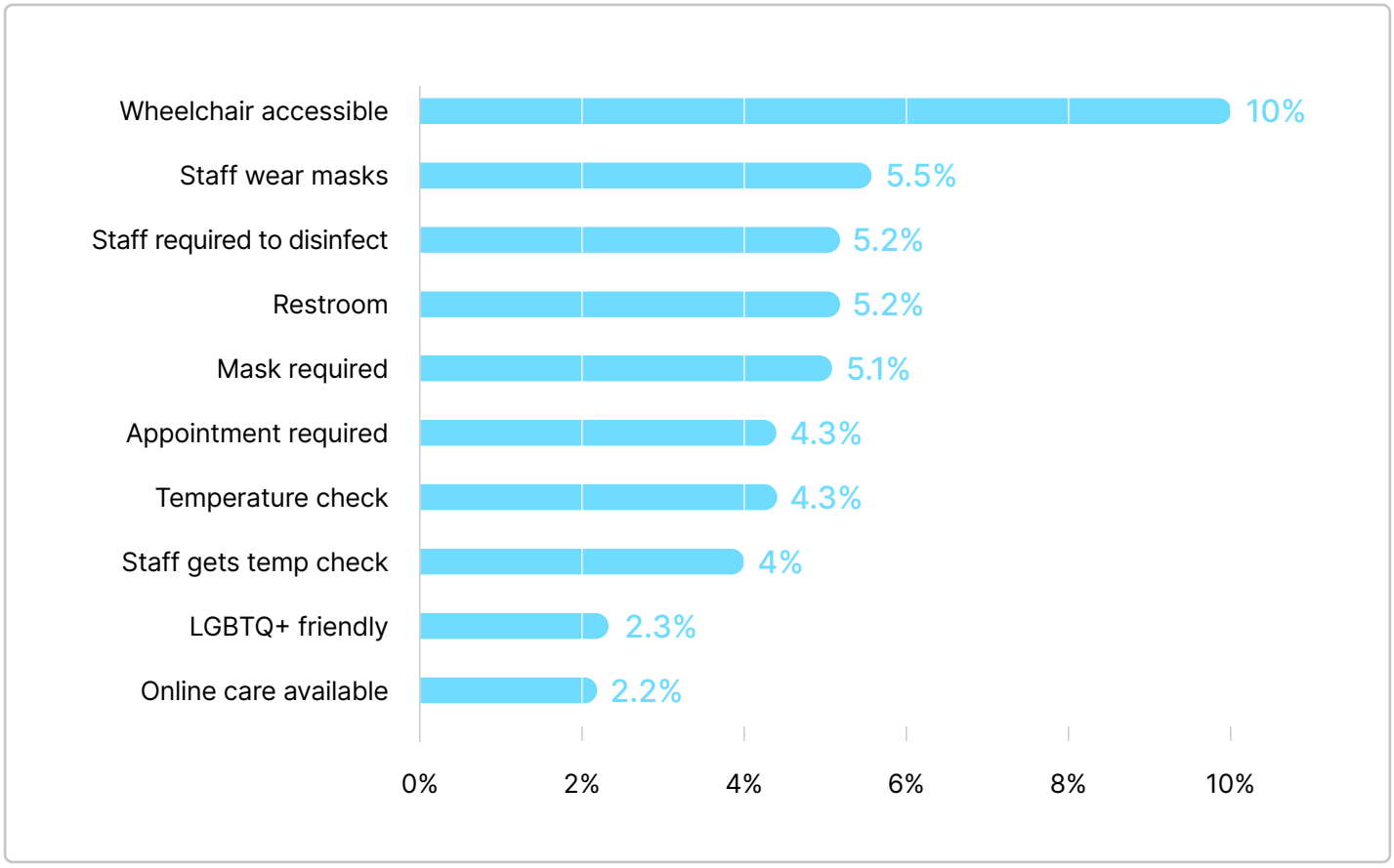
Most Popular GMB Attributes—Shopping



It also seemed that more retailers offered in-store pickup than delivery services, according to our data.

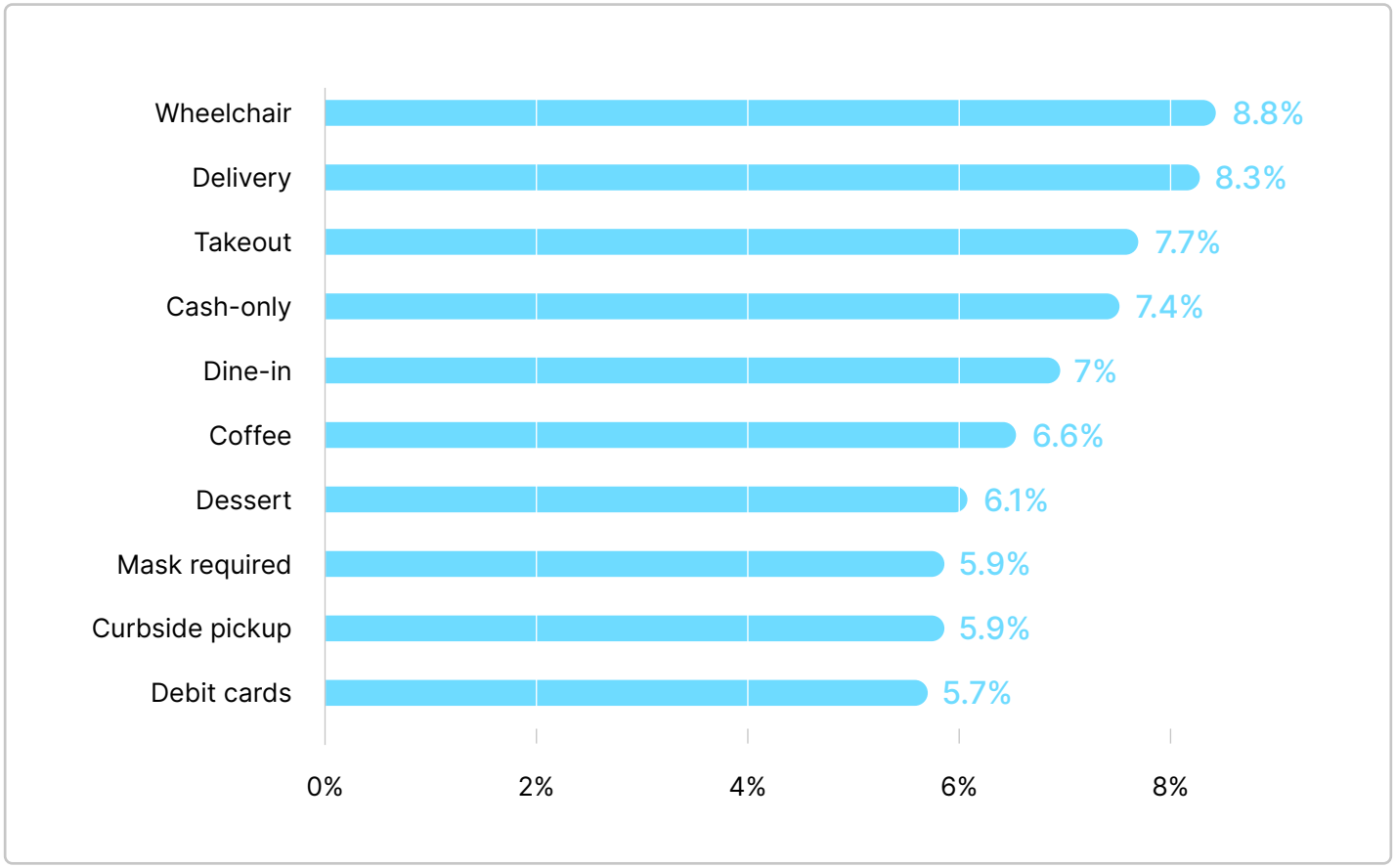
Establishments in Health & Medicine also relied heavily on COVID-19-related attributes, such as wheelchair accessibility, but sometimes to a greater degree than other industries. The wheelchair accessibility attribute was utilized by 10% of medical-related establishments, compared to only 6% of retail shopping listings.

Most Popular GMB Attributes—Health & Medicine



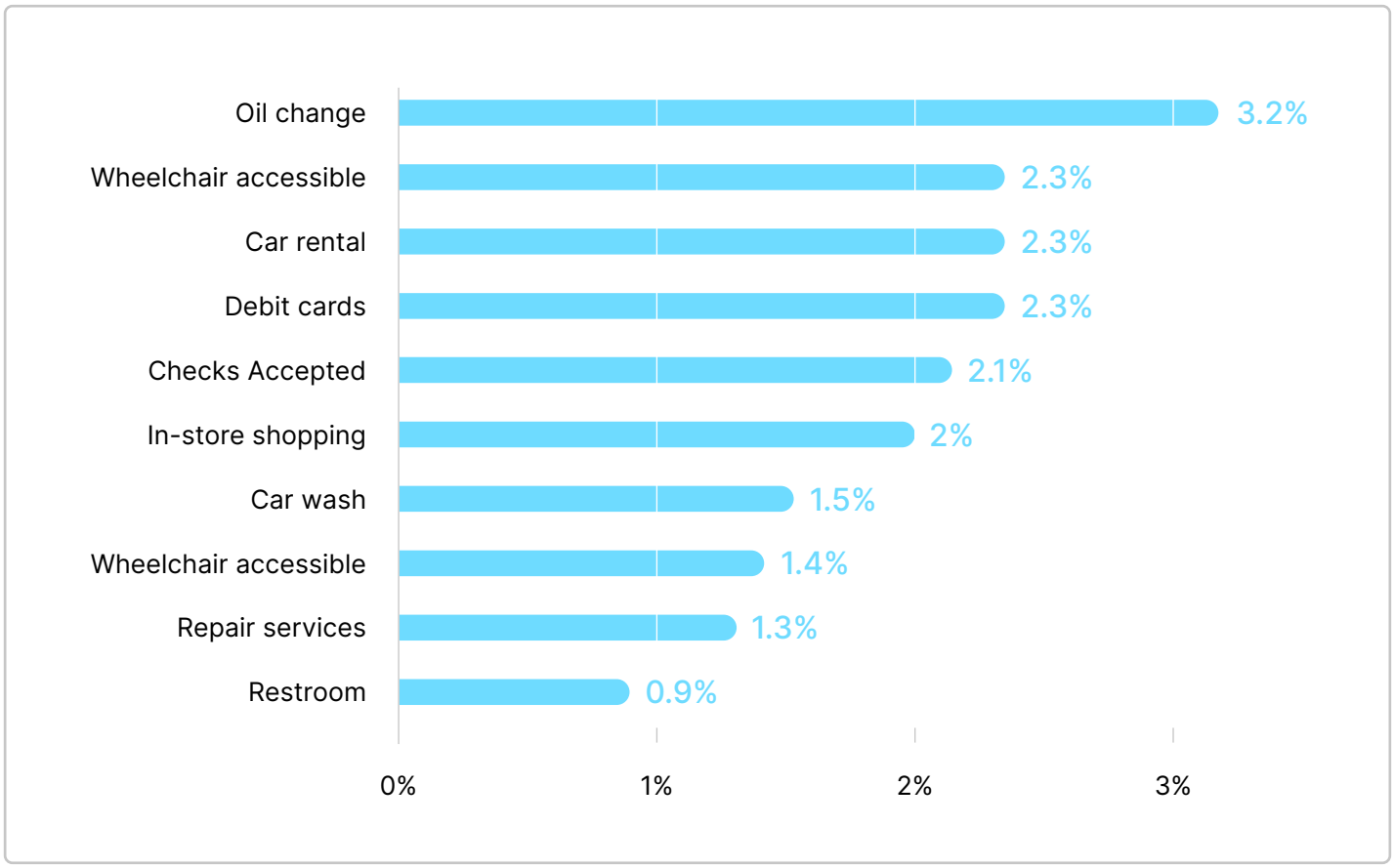
The industry-specific trend across these attributes was also evident with Food & Dinings businesses:

Most Popular GMB Attributes—Food & Dining



The Automotive industry followed a similar pattern, but the top attributes were less common than those in the aforementioned industries. This might help those businesses that choose to utilize them stand out more from the competition.

Most Popular GMB Attributes—Automotive & Vehicles



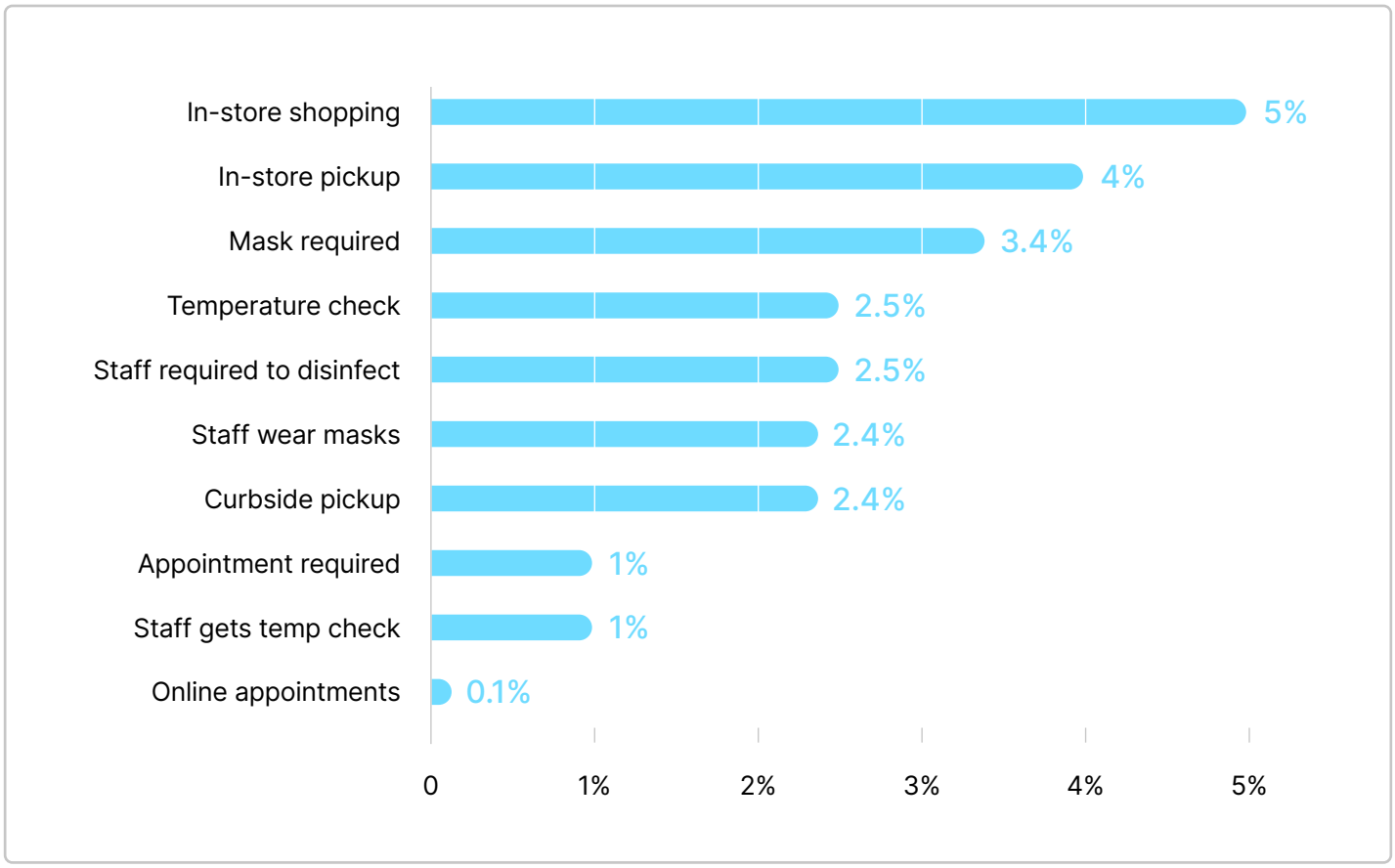
As you can see from the above, industry-specific attributes naturally become the most utilized in each area. Any businesses that don't employ them put themselves at risk of falling behind.

COVID-19-Related Attributes

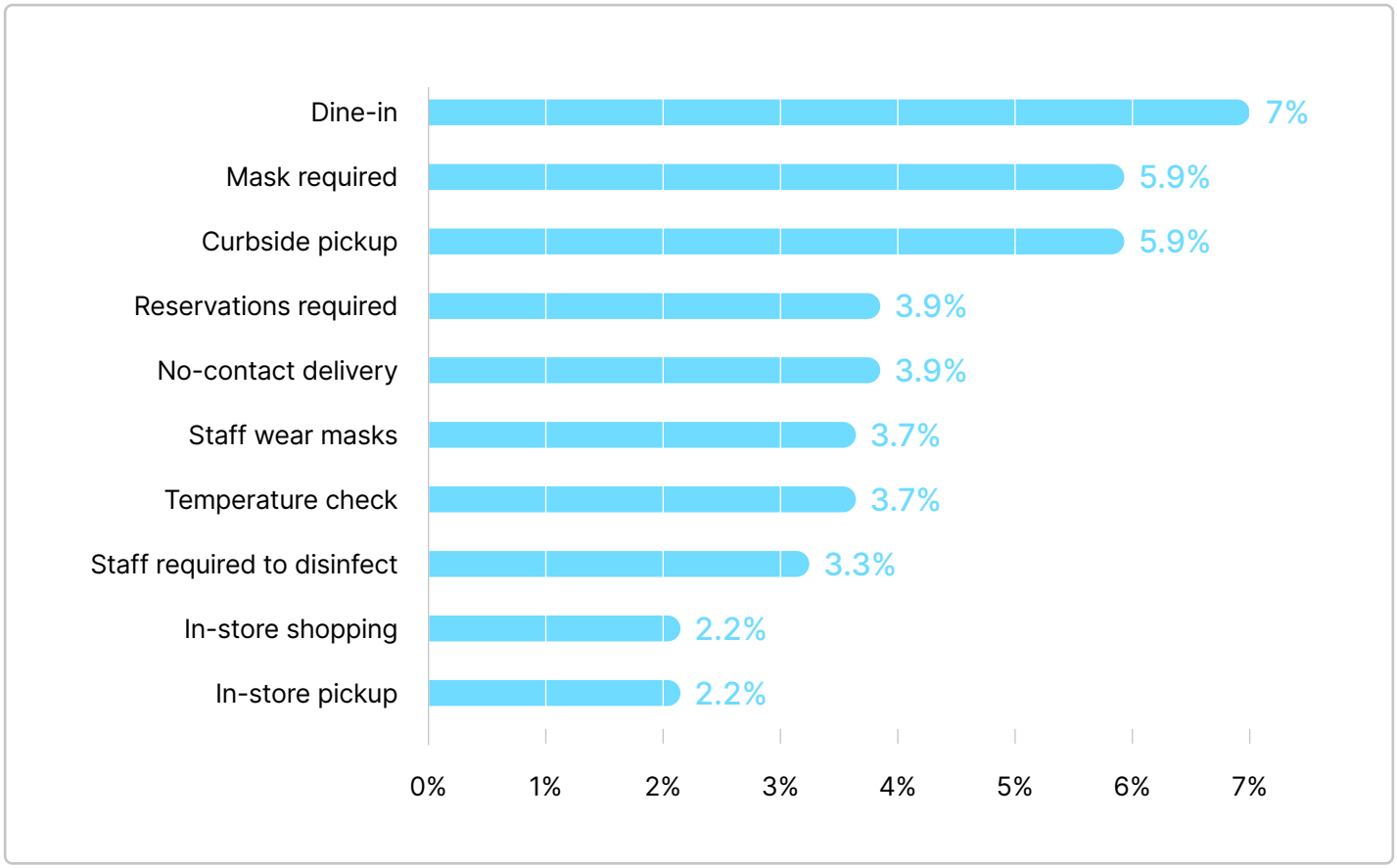
Industry-specific attributes also came into play when we analyzed updates related to the pandemic.

Comparing retail outlets to eateries, there was a difference in the prioritization of even some of the more universal attributes, such as “Curbside pickup.”

Most Popular COVID-Related GMB Attributes—Shopping



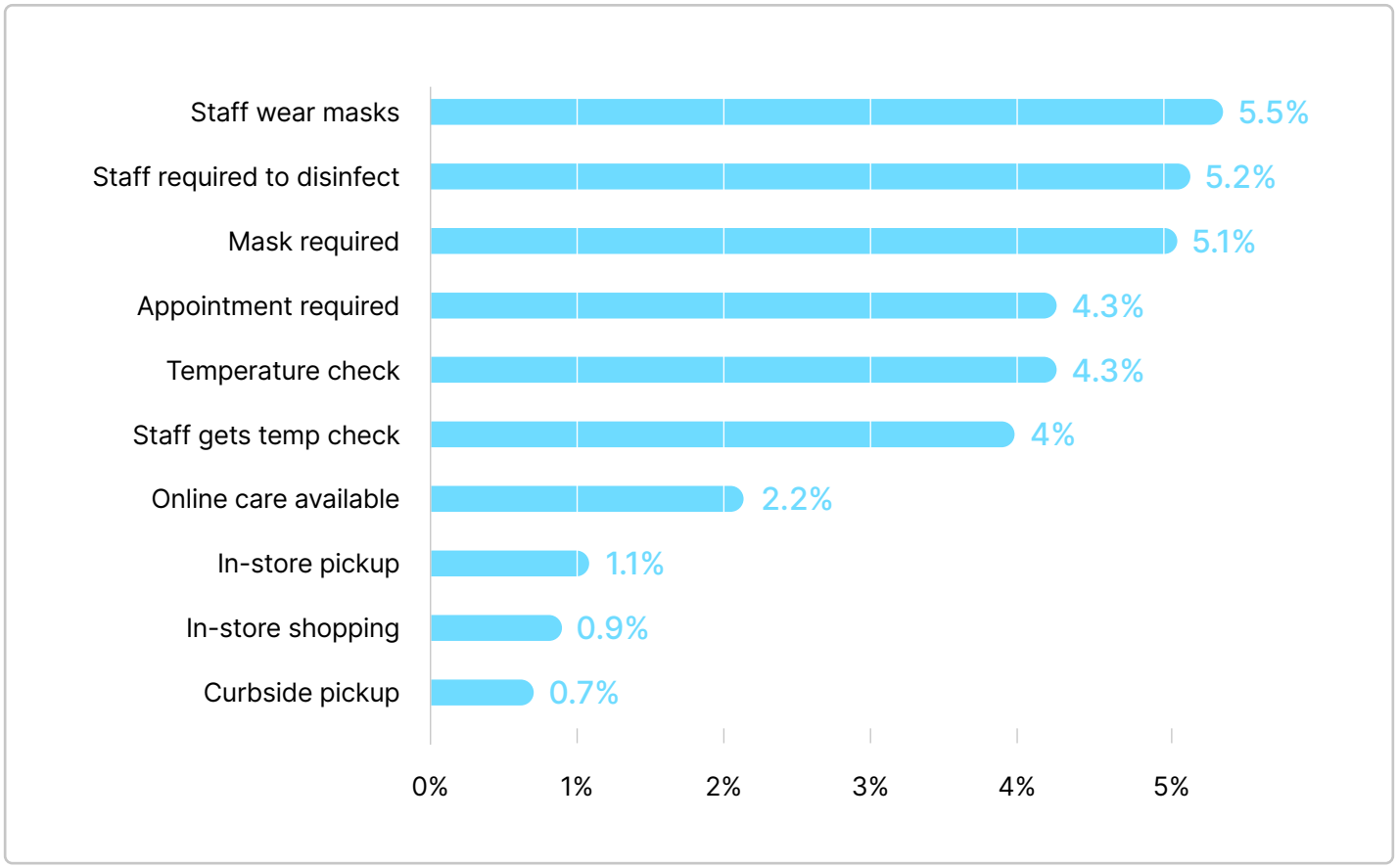
Most Popular COVID-Related GMB Attributes—Food & Dining



This comparison highlights the precise point of these attributes: catering to the needs of your potential consumers. It was clearly more important for Food & Dining businesses to offer contactless delivery of consumables than it was for retail businesses. The same applied to the need for reservations, too.

Insofar as medical establishments were concerned, the focus on sanitization came to the fore; such attributes were more prominent in Health & Medicine than they were for Food & Dining by nearly two percentage points. The likes of “Online care” (2.23%) were also important attributes in this case, as more and more businesses and patients sought socially distanced interactions.

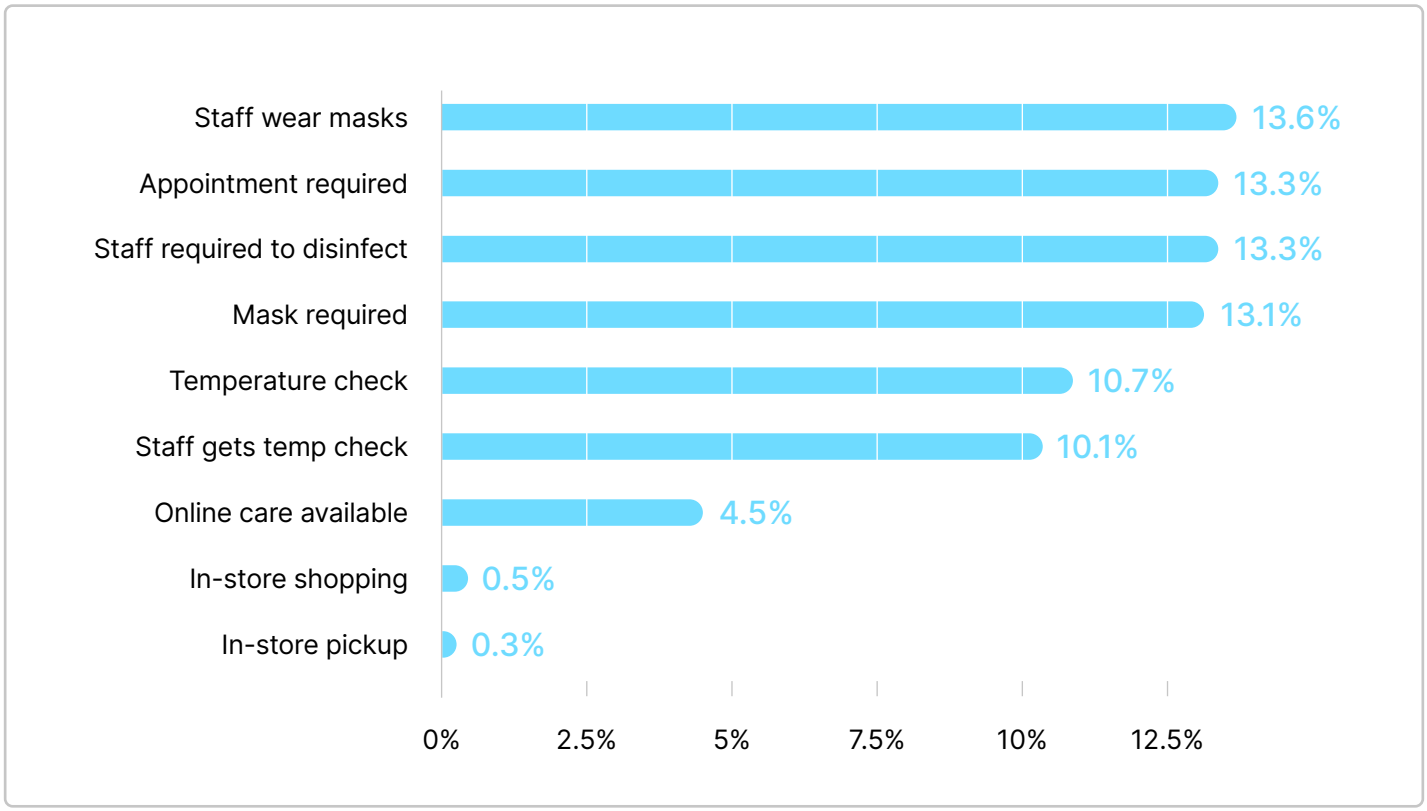
Most Popular COVID-Related GMB Attributes—Health & Medicine



The focus on staff was particularly evident here, as businesses tried to reassure customers that their establishments were safe.

The same types of details were also abundant in the Beauty & Spas category, but to an even greater degree than those in the medical field; a range of staff-related attributes appeared on more than 10% of listings in this area.

Most Popular COVID-Related GMB Attributes—Beauty & Spas



State of Technical SEO: Site Audit Stats

Methodology

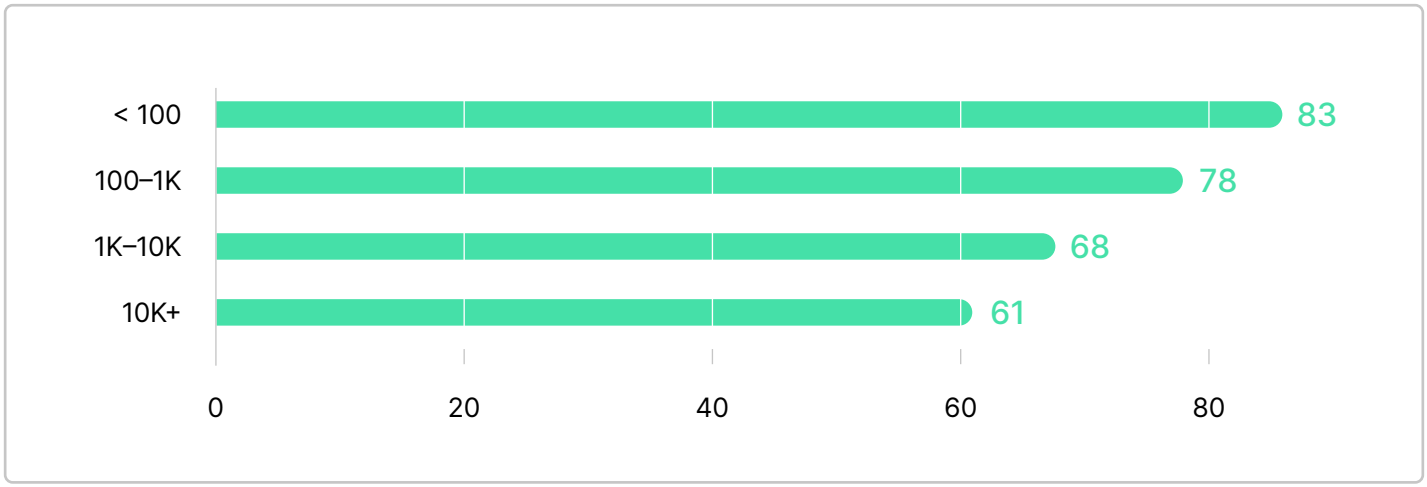
We gathered Site Audit results for 247K domains (311M pages crawled in total) and broke them down by domain size into four categories. These data include all the information about site health issues found amongst those analyzed in our data set.

Google must be able to crawl your site properly to index and rank its pages. Not every technical issue impedes Google's crawling and indexing to such an extent, but creating a site that makes this process as seamless and consistent as possible is vital to search success. In this section, we analyze the trends related to the technical health of a website via the issues detected by our Site Audit tool.

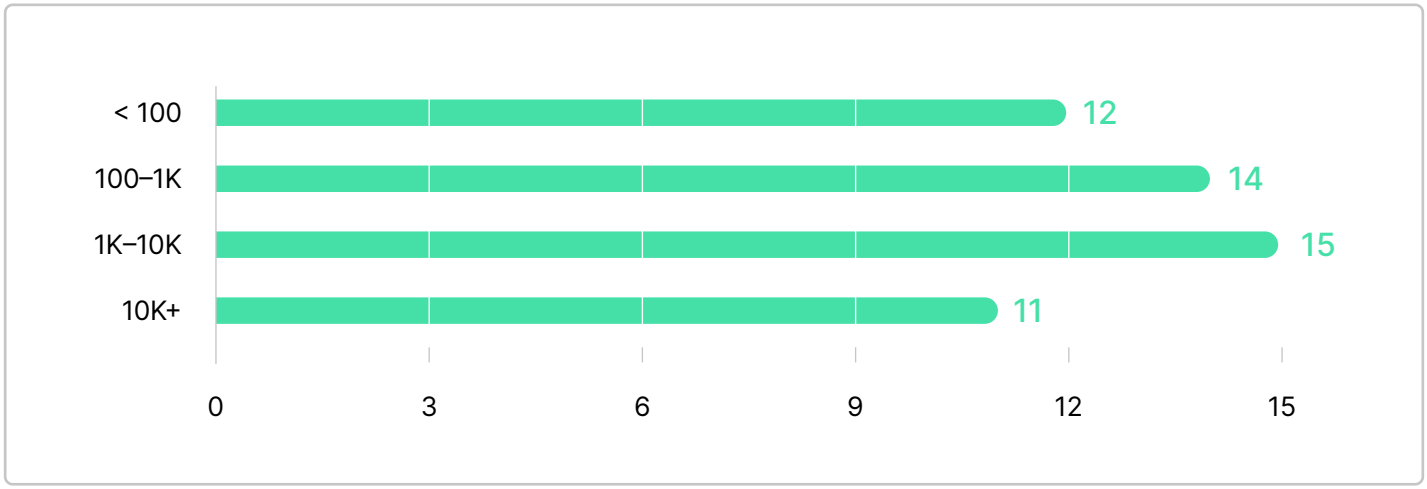
To analyze the technical SEO state of our chosen sites, we broke up our analysis according to size; our groups comprised sites with fewer than 100 pages, with 100-1K pages, with 1K-10K pages, and finally sites with 10K+ pages. In total, we analyzed nearly 250K domains and over 300M pages.

Here are our headline findings:

Average Health Score

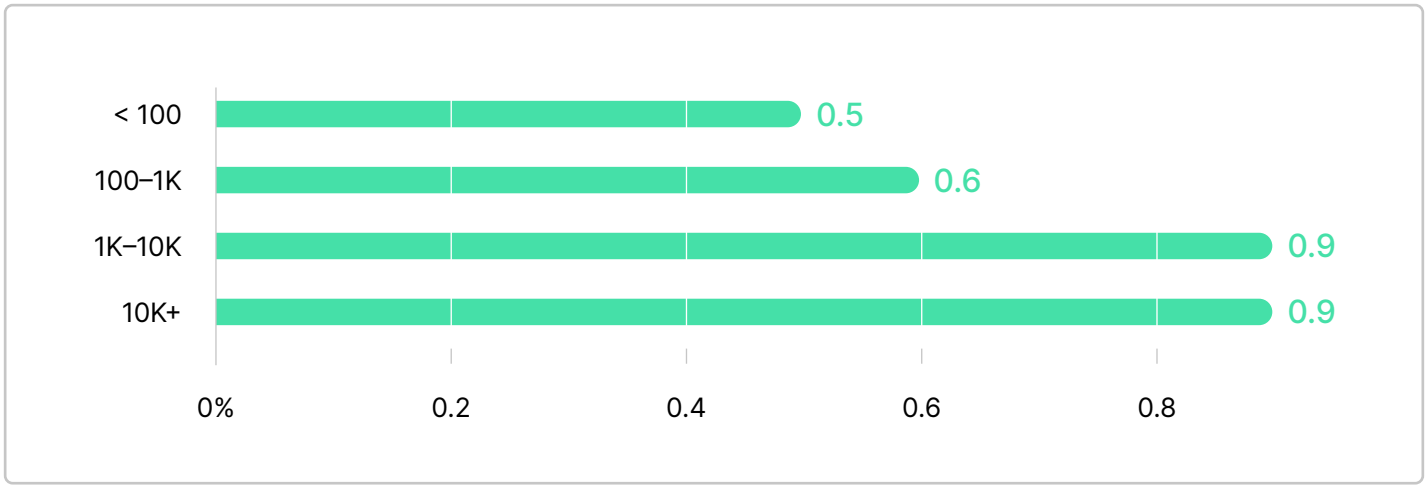


Average Number of Issues per Page



On average, sites of all sizes fell into the same bracket of 10-15 issues per page, with the number of issues slightly increasing as the number of pages increased until we reached the largest group. It follows that the larger a site becomes, the more likely it is to face issues, but there are many factors to consider so it is by no means definitive.

Average Number of Errors per Page

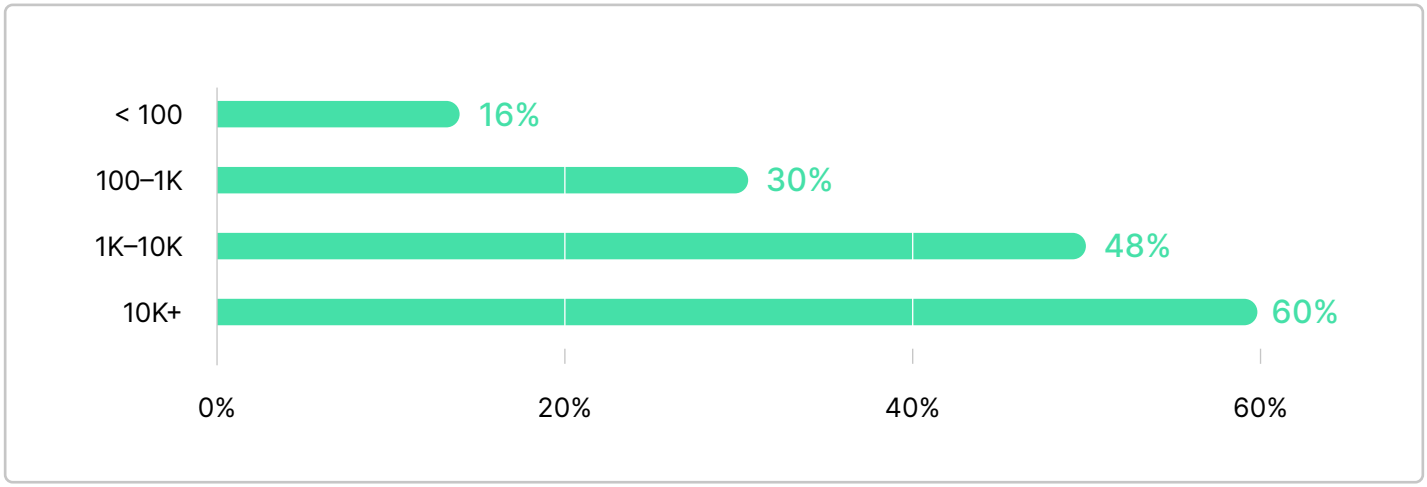


This trend was followed by the average number of errors per page, too, but the average number never actually exceeded one in our data set.

Hreflang Tags

The implementation of hreflang tags helps Google understand which pages to present to users in certain countries, insofar as other languages are required. The data show that larger sites were more likely to suffer from hreflang issues than smaller ones:

Share of Domains With Hreflang Issues



Naturally, the likes of product catalog additions and expansions into new markets come into play here, so it's crucial that businesses maintain hreflang tags as they grow if they are to appeal to new users in various languages.

Structured Data

Methodology

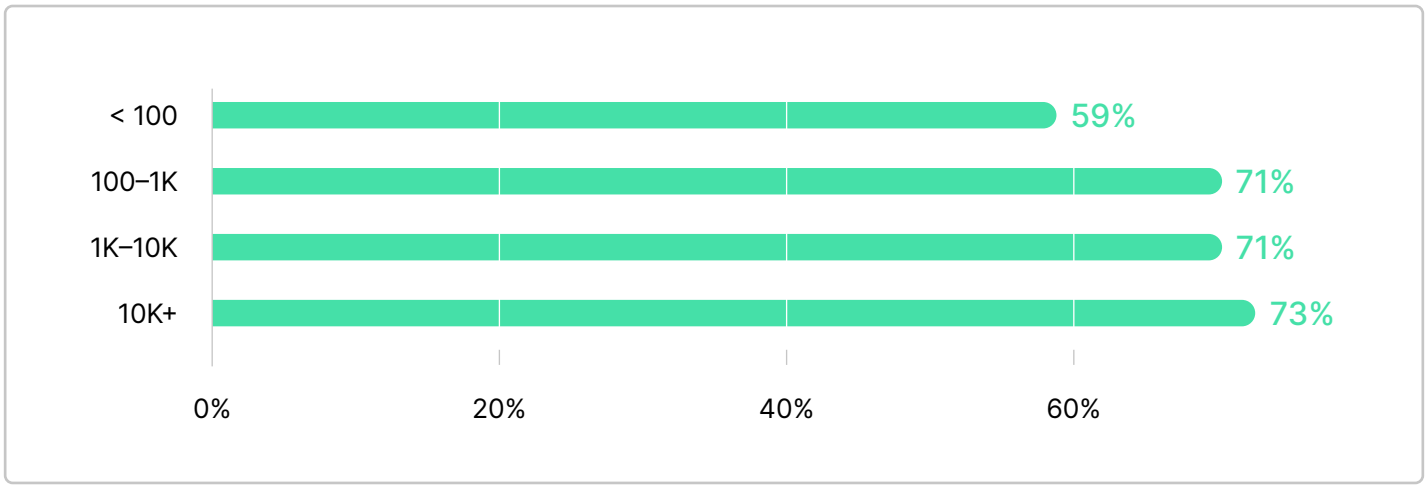
We took Site Audit results (from our structured data report) for 277K domains (314M pages crawled in total) and broke them down by domain size into four categories. This includes all the structured data information found amongst those analyzed in our data set.

Aside from the technical issues that impact how bots understand, crawl, and index a page, one of the most important aspects of site health concerns structured data markup.

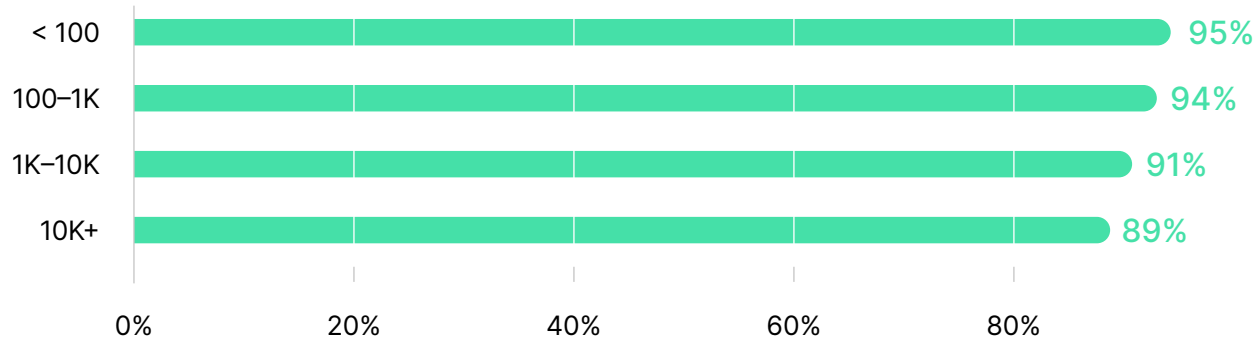
The markup code added to a page not only helps bots better understand its content, but also determines whether or not a page appears as a rich result on the SERP (it is not, of course, guaranteed).

Let's start with a top-level look at the state of structured data on the web:

Share of Domains Which Implemented Structured Data



Average Share of Valid Structured Data Items



Sites with fewer than 100 pages were considerably less likely to have implemented structured data; 13% fewer had done so than those with 100 pages or more. There are two factors that may have been relevant here:

1. A lack of knowledge of structured data and capacity to implement it

2. The nature of the sites in question and the relevance of structured data to them

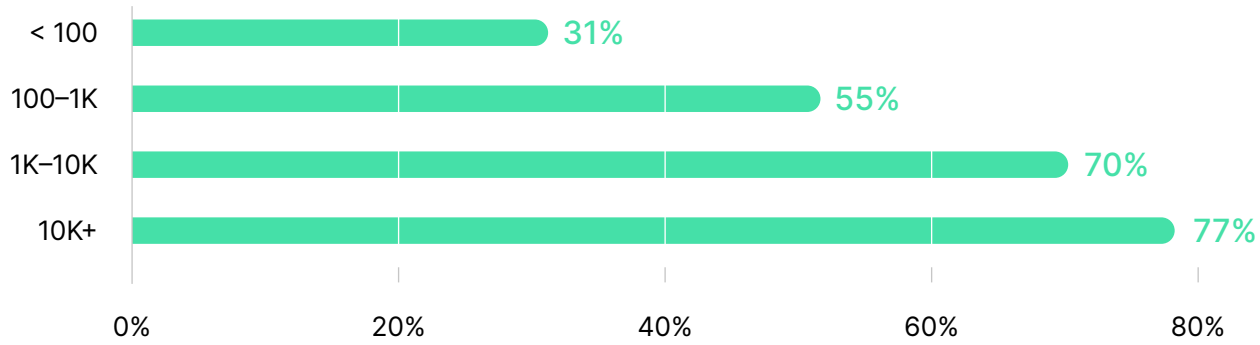
When it came to the presence of valid markup, we didn't find a significant difference across our groups, which indicated that proper implementation was not a cumbersome task for owners of any size of site.

Structured Data Format

Structured data can be added to a page either by using JSON-LD or microdata. The main difference is that microdata gets added to the actual HTML of the page, whereas JSON-LD utilizes scripts that are added to the page's header. The latter is Google's preference, according to John Mueller, but we analyzed the commonality of both implementations in our study.

Here, we see the percentage of sites per domain size that contained any form of structured data:

Share of Domains That Contained Any Form of Structured Data

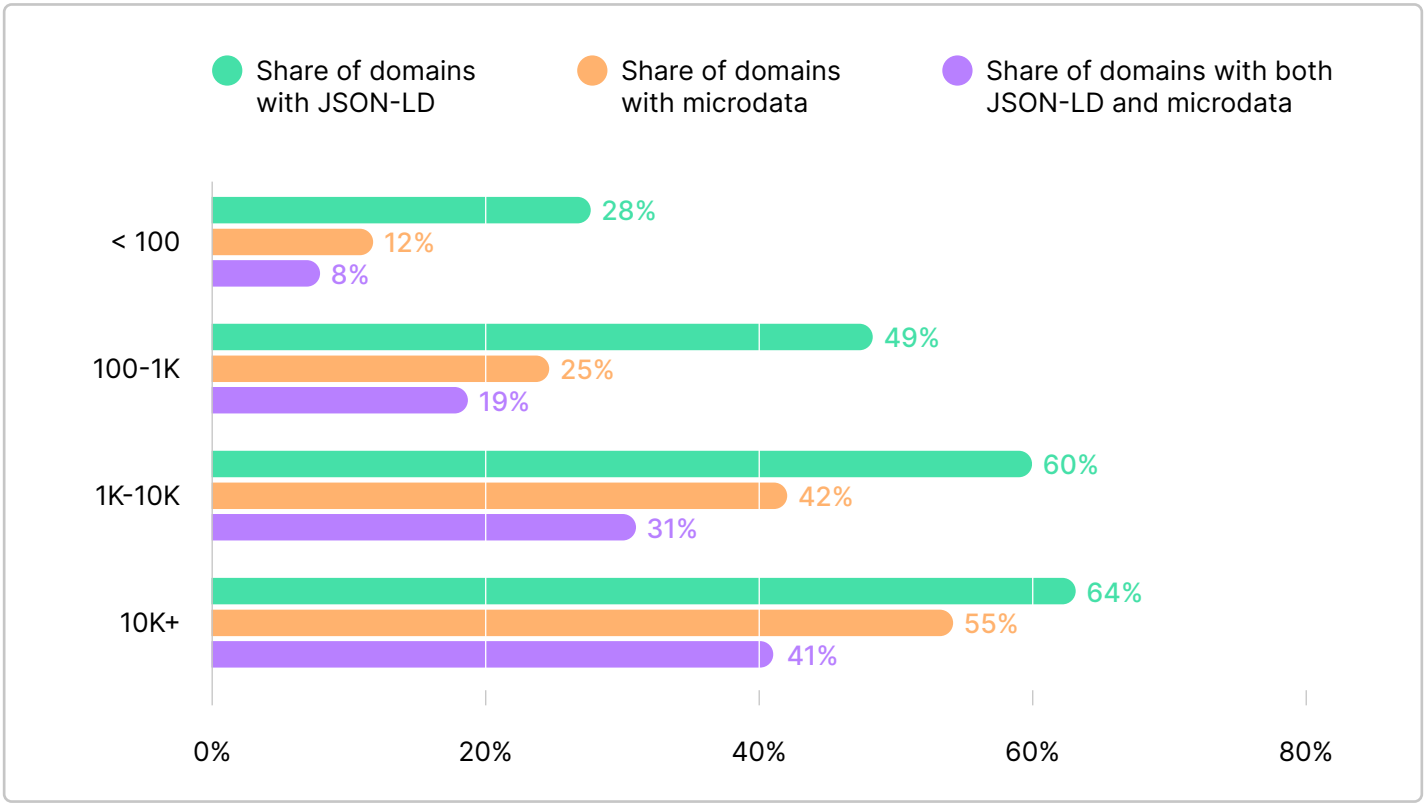


On average, fewer than 50% of websites contained structure data markup of any kind. The implementation of markup is not vital for every site, but the trend here shows that the larger a site becomes, the more likely it is to contain structured data. At least 70% of sites with more than 1K pages had, on average, some form of markup implemented, whether it be JSON-LD or microdata.

In contrast, sites with fewer than 100 pages were, on average, 55% less likely to implement structured data, while sites with up to 1K pages were 22% less likely to do so.

Smaller sites that might already have a harder time competing, such as those in the eCommerce space, may be further impeding their organic success by not having markup to achieve rich results in the SERPs. It may be down to a lack of knowledge or capacity more than it is to relevance in many cases, but this represents an opportunity for some small businesses to gain ground in organic search.

Different Forms of Structured Data Usage



Google's preference for JSON-LD didn't necessarily mean that sites shunned other options. On average, nearly 24% of sites implemented structured data via microdata. Moreover, there was a clear split between smaller and larger sites in terms of implementation levels; those with fewer resources and perhaps less access to knowledge and technical expertise might be less likely to implement structured data as a result.

Once a site hit the 1K-10K-page mark, it was 260% more likely to utilize microdata than a site with fewer than 100 pages. On average, 48.12% of sites with 1K pages or more made use of microdata. Although, based on the trend displayed in the chart, one would have to imagine that sites closer to 1K pages would be less likely to utilize microdata than those closer to 10K pages.

An average of 43.28% of all sites used JSON-LD to implement structured data, making it 84% more common than microdata in our data set. Sites containing 1K or more pages implemented JSON-LD over 60% of the time on at least one of their pages.

There was also a significant gap amongst sites below the 100-page mark, with only 28% of them having utilized JSON-LD.

Overall, only 17.64% of sites contained both formats, while that number jumped to 30% or more when we looked at sites with over 1K pages. Sites with over 10K pages displayed a jump of more than 10 percentage points to 41.49%.

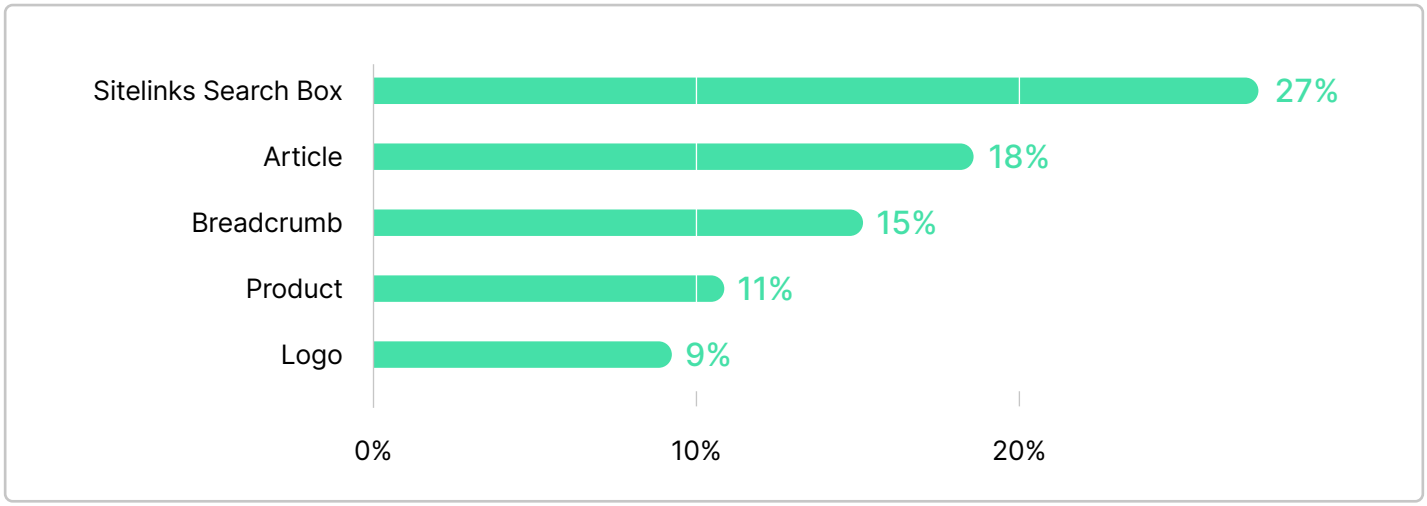
What is at play here is that larger sites are facing more complex scenarios that might require data sourcing from third parties, such as reviews, or adding new attributes to long-standing existing markup in legacy situations.

The Most Common Uses of Markup

There are many schemas that sites can utilize for markup in Search. The ones that are supported by Google can impact how the URL appears on the SERP and, therefore, improve performance of the likes of CTR.

Here's a list of the most common markups we picked up across all site types and sizes:

Most Popular Structured Data Items for All Websites

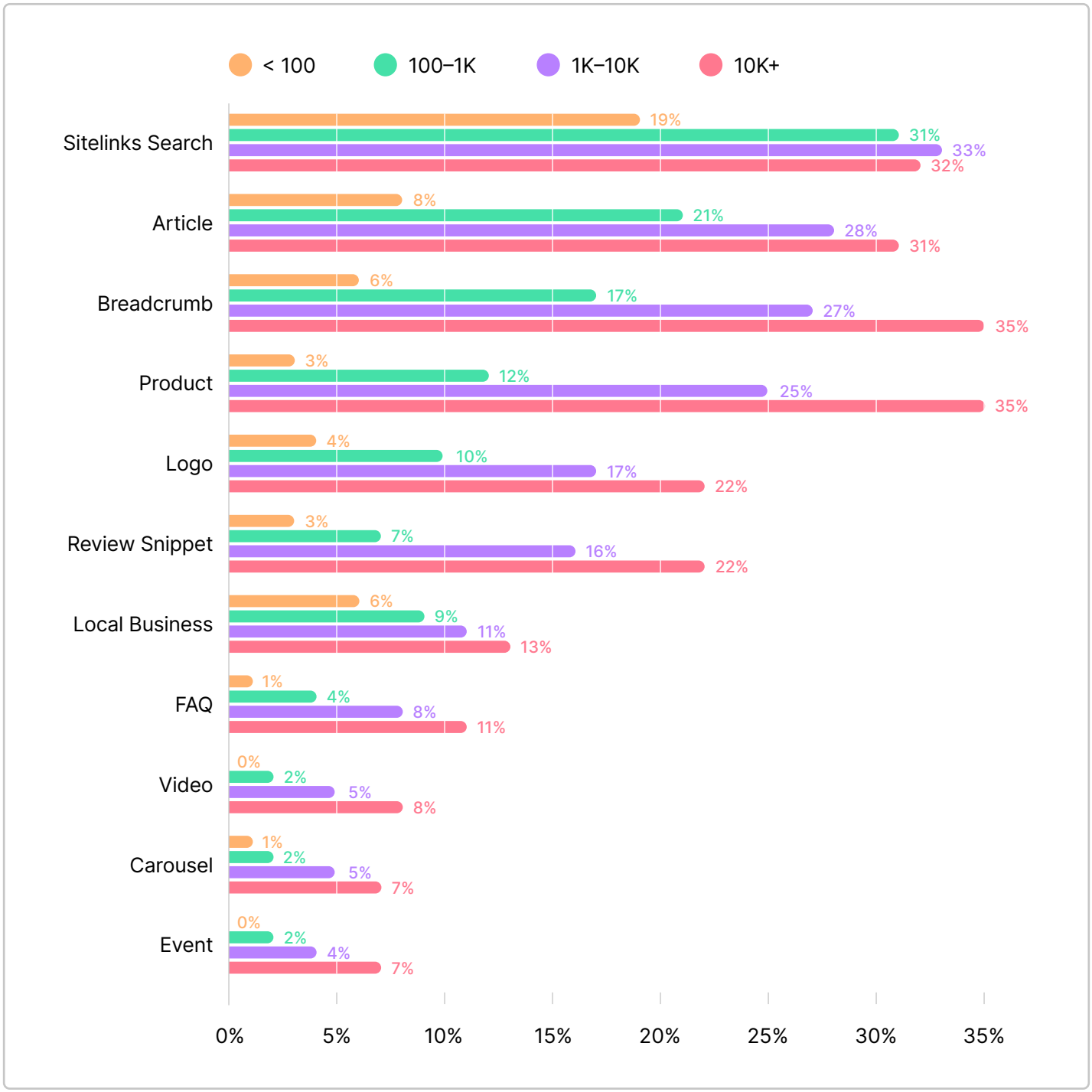


Article markup, for instance, could apply to most blog posts or news articles, while breadcrumbs or product markup could help navigational elements appear on the SERP. These items appeared in 17.95%, 15.24% and 11.09% of all site listings analyzed respectively.

Sitelinks search box, which allows pages to appear with a search box on the SERP, appeared in 26.95% of results in our data set. This item can come as standard with some CMSs and plug-ins, so it can be built in automatically.

As you might suspect, the commonality of the various markups depended on the size of the sites in question:

Popular Structured Data Items



The sitelinks search box markup, for instance, was not as commonly used as the product and breadcrumb markups amongst sites with more than 10K pages. Here are some other noteworthy trends:

Breadcrumbs usage increased as sites became larger.

Additional navigation options in the SERPs make the search experience easier for users.

Sites <100 pages lacked article and product markup.

Under-optimized pages, even on small sites, are restricted in terms of organic visibility.

Sites <100 pages lacked Local Business markup.

Optimizing for local listings is crucial for small businesses, especially when you consider that many local businesses have sites that are well under 100 pages in size.

Fewer than 10% of sites made use of FAQ markup.

While larger sites are more likely to have implemented FAQ markup based on our data, it's clear that there's an opportunity for more sites to gain from the additional visibility this feature, along with the 'How-to' markup, can bring.

Overall, the largest sites took greater advantage of structured data markup than smaller ones. Even sites that contained 1K-10K pages hadn't implemented the foundational markups typically found on larger sites, such as review snippets.

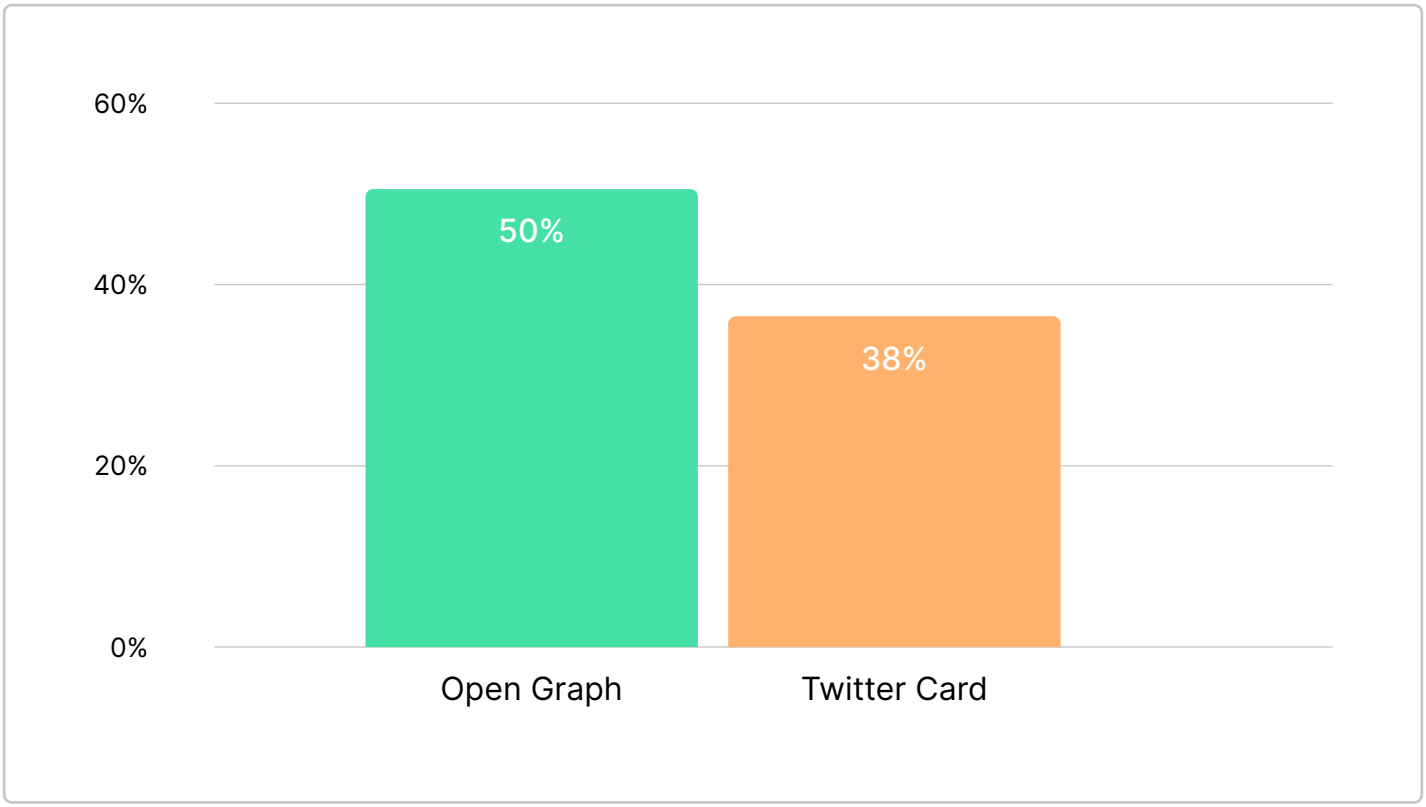
State of Social Sharing Markup

When it comes to enhancing URL appearance, the ability to add code to a page in order to produce richer results applies not only to SEO, but also to social media.

This is most often seen via the Open Graph protocol, originally created by Facebook to indicate elements like page title or description, or Card markup on Twitter, which allows control of images when adding URLs to tweets.

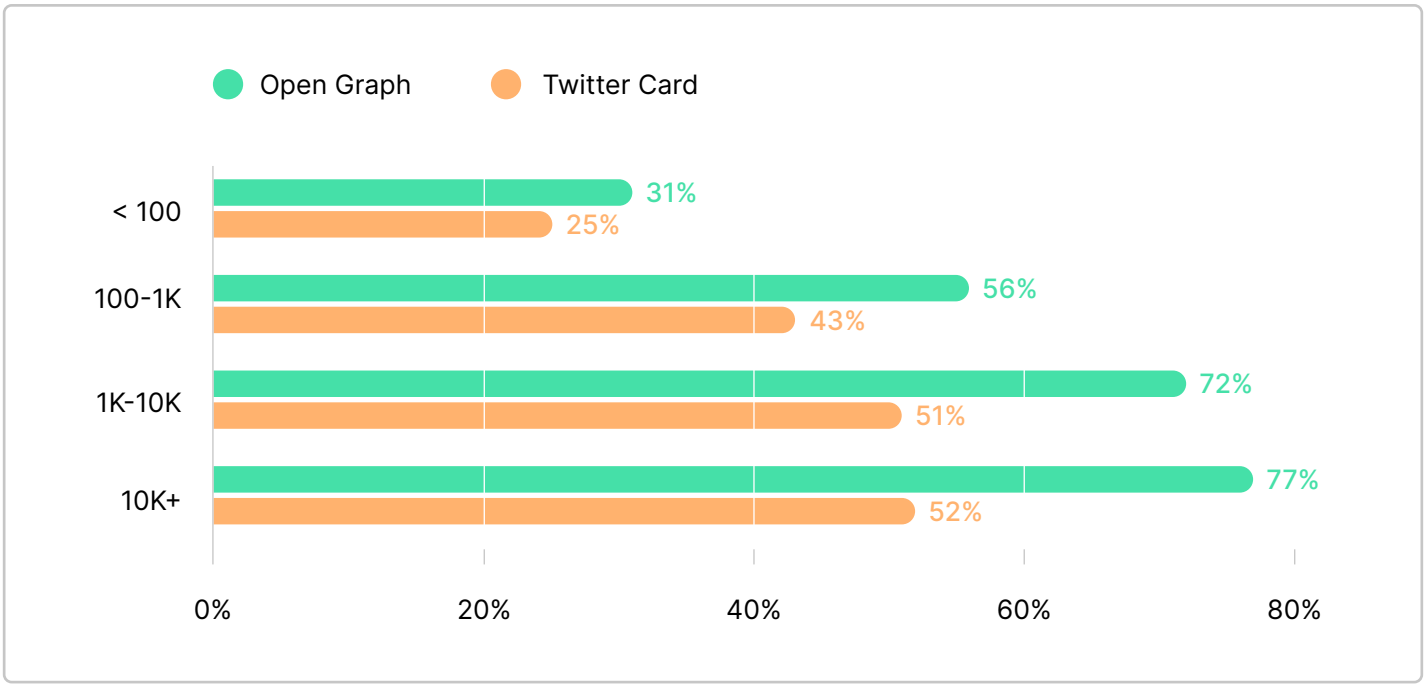
Here's a look at how common these two forms of markup were found to be in our study:

Share of Domains With Specific Metadata Elements



The utilization of the Open Graph protocol was roughly 30% more common than Card markup on Twitter.

Open Graph and Twitter Card



The trend with social markup follows that of the aforementioned markup for search engines. Sites with under 100 pages were 59% less likely to employ the Open Graph protocol and 52% less likely to utilize Twitter Card markup than sites with 10K+ pages.

Core Web Vitals

Methodology

We took 2,520 random keywords from the Semrush Sensor US database for both desktop and mobile. These keywords were from different categories and had different search volumes. For each of these keywords, we collected the top 10 results from the SERPs.

For all these links, we collected data for three metrics of the Core Web Vitals (CWV): Largest Contentful Paint (LCP), First Input Delay (FID) and Cumulative Layout Shift (CLS). We used lab data and field data (definitions here ↗) to conduct our analyses, with Total Blocking Time (TBT) used instead of FID for the former, where field data did not exist). In total, we analyzed lab and field CWV data on 24K URLS for mobile and desktop during October 2021. More details on how the CWVs are assessed can be found here ↗.

For historical analysis, we collected data for about 1.7M desktop and 324K mobile URLs using the Site Audit tool and our time range for this was June 2021 (when the Core Update took place) to September 2021.

In June 2021, Google began a slow roll-out of the Page Experience Update. At the center of the update were Google's Core Web Vitals, which became ranking factors in its search engine:

LCP	Largest Contentful Paint. A metric that tracks the loading speed of web pages
FID	First Input Delay. A metric that tracks how long it takes for a visitor to interact with a web page
CLS	Cumulative Layout Shift. A metric that tracks the stability of visual elements of a web page

CWV & Rankings

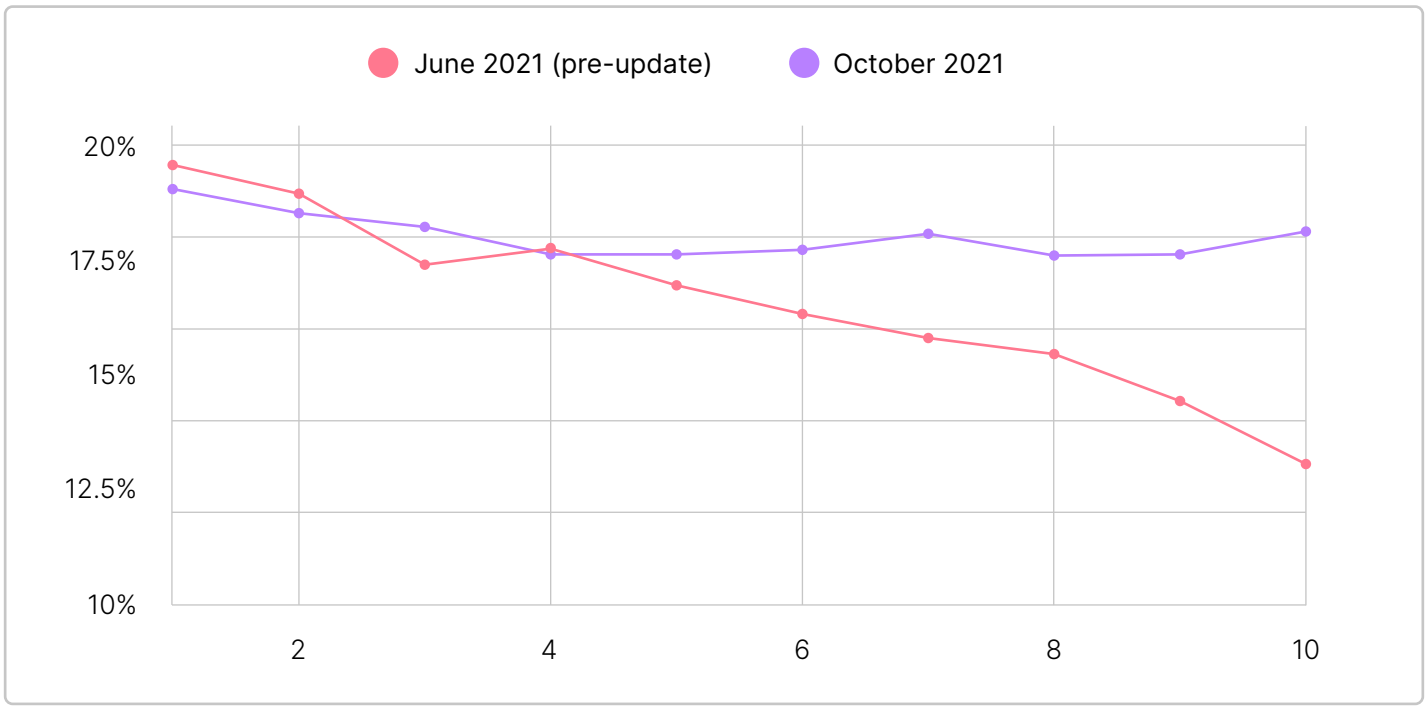
First and foremost, let's zoom in on the impact on rankings seen before and after the update.

Here, we looked at the percentage of URLs that passed CWV with a score of “Good” or better (on mobile—field data) both before and after the update.

This is not an exact causation, but the chart below reflects the correlation found between CWV and ranking:

Share of URLs With “Good” CWV Scores in Each Ranking Position

Mobile Field Data



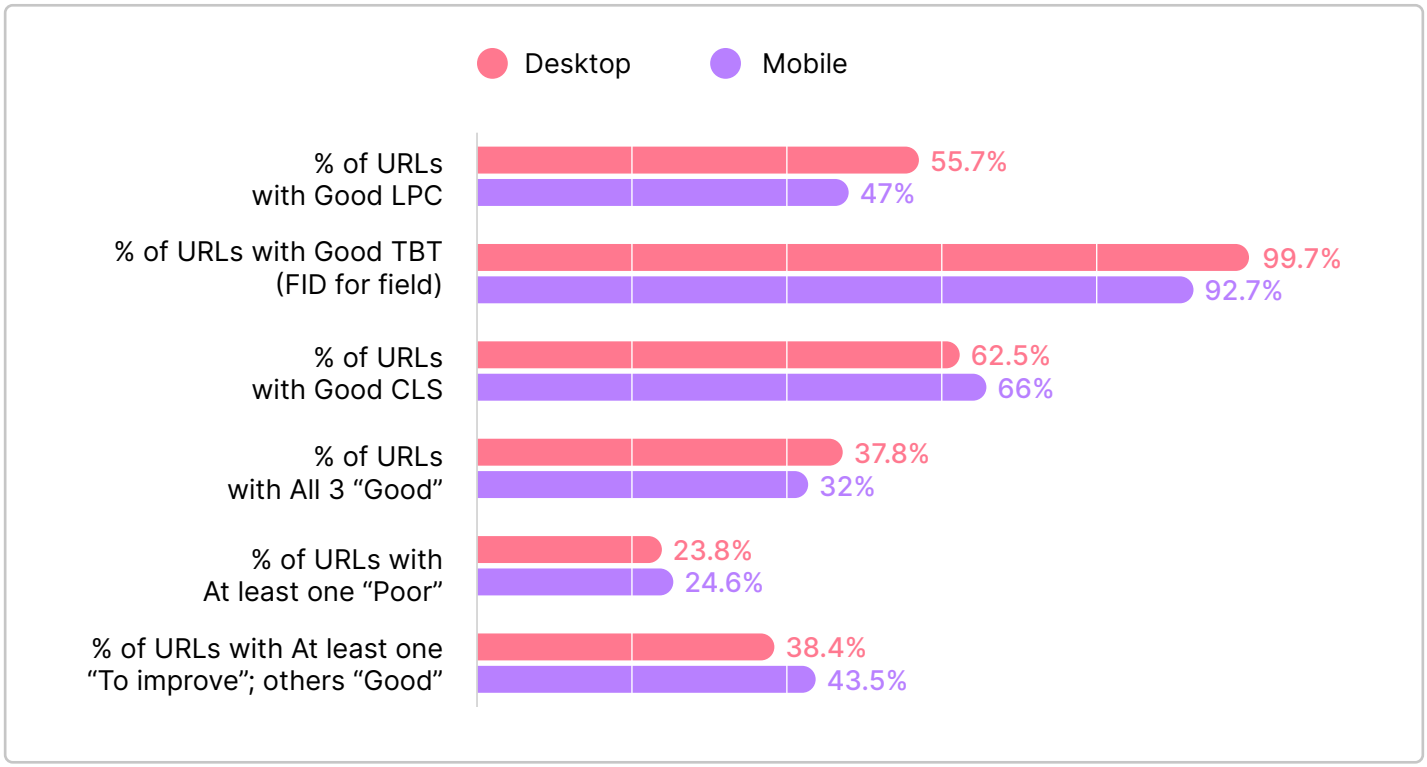
There did not seem to be any significant correlation between ranking and passing CWV, as the percentage of URLs that passed in some cases actually decreased. However, from positions one to eight, the differences in pre- and post-update numbers were marginal at best, so it wasn’t clear that CWV impacted rank across the board. Even if the data had pointed to such an impact, it would not have been possible to create a hard conclusion due to the correlative nature of the data.

Core Web Vitals: How Many URLs Passed?

To analyze how many URLs passed the CWV tests, we broke down desktop and mobile URLs according to field data and whether or not they passed any one of the metrics.

Share of URLs With "Good" CWV Scores per Metric

Field Data, October 2021



As of October 2021, only 32% of URLs tested passed CWV with scores for LCP, FID and CLS on mobile.

FID had the highest success rate, as 92.7% of the URLs studied passed the threshold on mobile. Over 60% of URLs did not have an issue with CLS, but there wasn't as much success with LCP, only 47% did not have an issue with LCP.

On the desktop side of things, a greater percentage of sites passed CWV. Over 60% of desktop URLs passed CLS, essentially all URLs passed FID, and significantly more desktop sites passed LCP as compared to mobile.

Across devices, about 25% of the URLs tested performed within the "Poor" range for at least one of the three metrics. A further 38.4% of desktop URLs and 43.5% of mobile URLs had one metric in the "yellow" (AKA marked "To Improve") for one metric, while they passed the other two.

Comparing Field Data to Lab Data: The CWV Gap

In order for Google to register that the performance data captured by the browser for a specific URL should be counted, it must accrue a certain amount of traffic.

However, many sites do not meet the threshold needed to produce field data. Instead, they need to rely on lab data.

The problem is twofold:

1

FID is dependent on user interaction. Unless Google is tracking actual user data, i.e. field data, FID must be simulated with an entirely different metric; the common practice is to use Total Blocking Time (TBT).

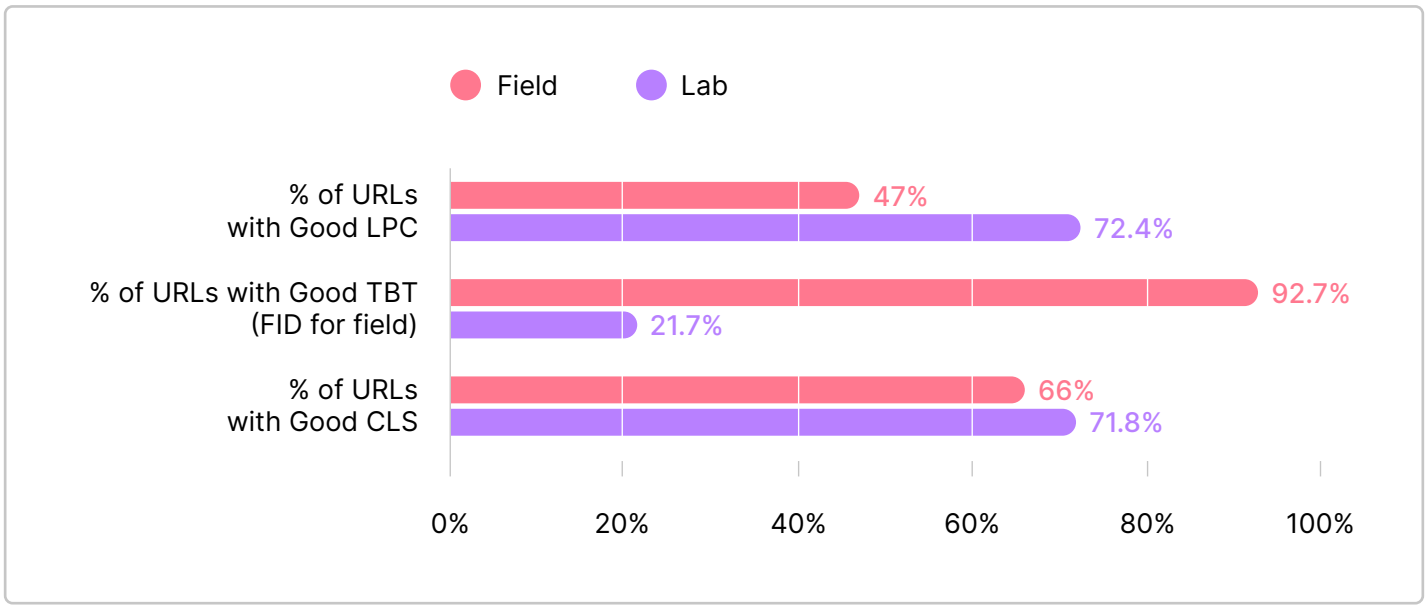
2

Google simulates mobile performance as if the user was on a 3G device. This means that for those locations in which 4G is the norm, lab data will indicate a worse performance than what users actually experience.

Here's how lab data stacked up against field data on mobile:

Percentages of URLs With "Good" CWV Scores

Mobile Data, October 2021



There was clearly a greater propensity to pass CWV when field data was implemented. In fact, on average, it was 52% more likely that a URL would pass CWV when field data was being utilized instead of lab data on mobile.

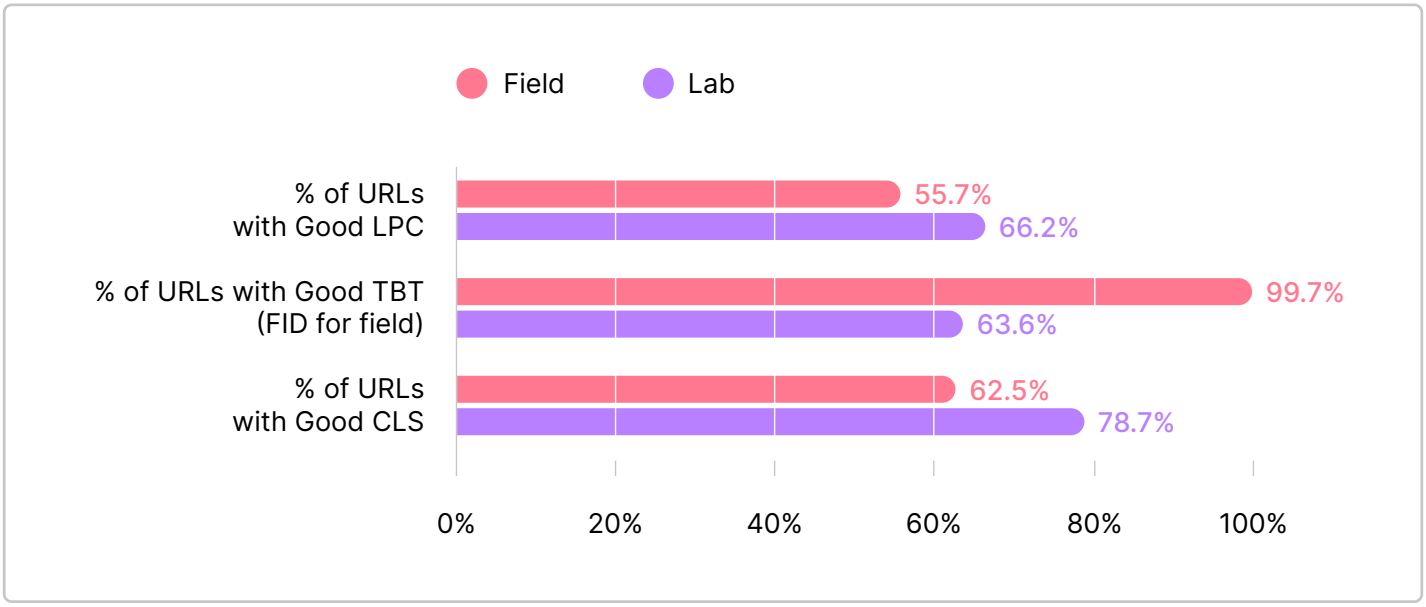
Looking at the data per metric, we saw that:

- **54% more URLs** passed LCP when utilizing lab data
- **9% more URLs** passed CLS when utilizing lab data
- **76% fewer URLs** passed when TBT was the metric, not FID

On desktop, the numbers between field and lab data were far closer, which was most likely due to the simulated data being more similar in terms of device speed than they were on mobile.

Percentages of URLs With "Good" CWV Scores

Desktop Data, October 2021



In total, there was a marginal difference between the sites that passed CWV on desktop when comparing lab and field data (37.8% vs 32%).

When we looked at TBT vs FID results, there was a pass rate difference of 36% on desktop (as of October 2021, 99.7% URLs passed the FID thresholds and 63.6% passed TBT). On mobile, however, the gap was much wider at 76% (92.7% passed FID, but only 21.7% passed TBT).

For LCP, only 18% more URLs passed with lab data on desktop, compared to 54% on mobile. Moreover, the gap between CLS using lab vs field data widened on desktop, with 26% more URLs passing lab data, as opposed to 9% on mobile.

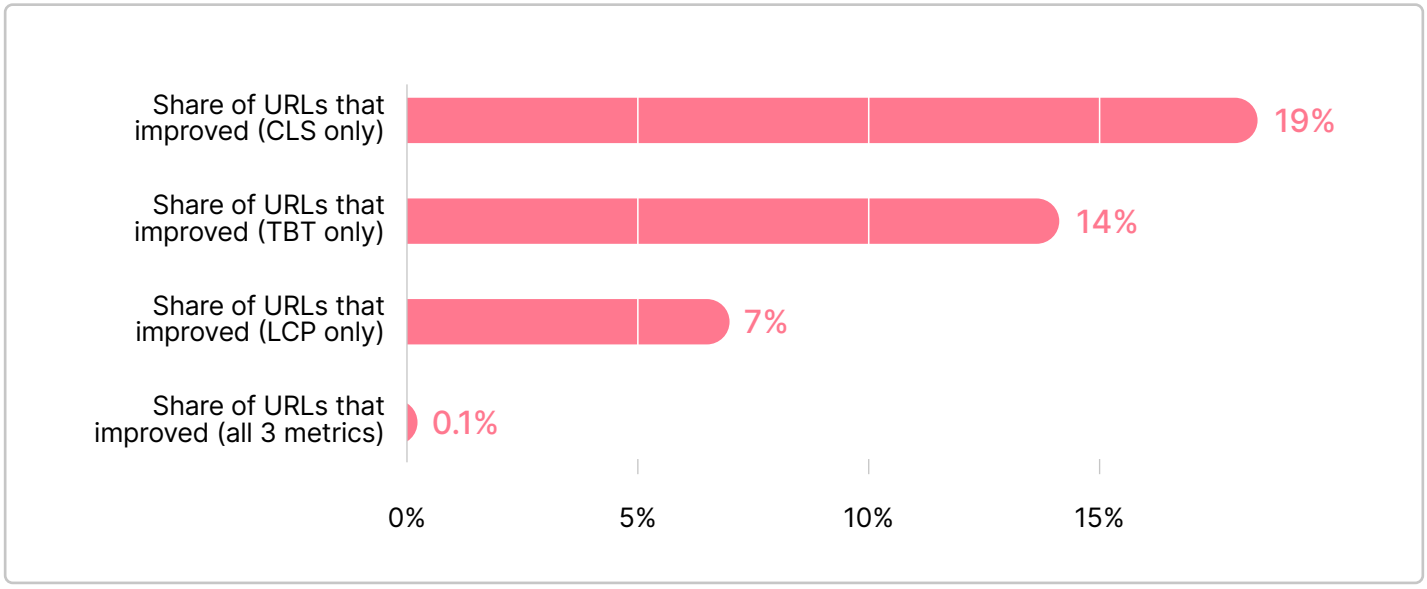
Using lab data on mobile may not be a good indicator of whether or not a site would pass CWV, but lab scores on desktop might provide a more accurate picture of how it would perform if field data were to be utilized.

Core Web Vitals: How Difficult Is It to Move from Poor to Passing Scores?

To understand the possibilities of improving web experiences, we took lab data for both mobile and desktop and analyzed the percentage of improvements that resulted in moving from a “Poor” score to a “Good” score, from a “Poor” score to a “To Improve” score, and from a “To Improve” score to a “Good” score.

Mobile URLs

Share of URLs Showing Improvement Between Thresholds on Mobile

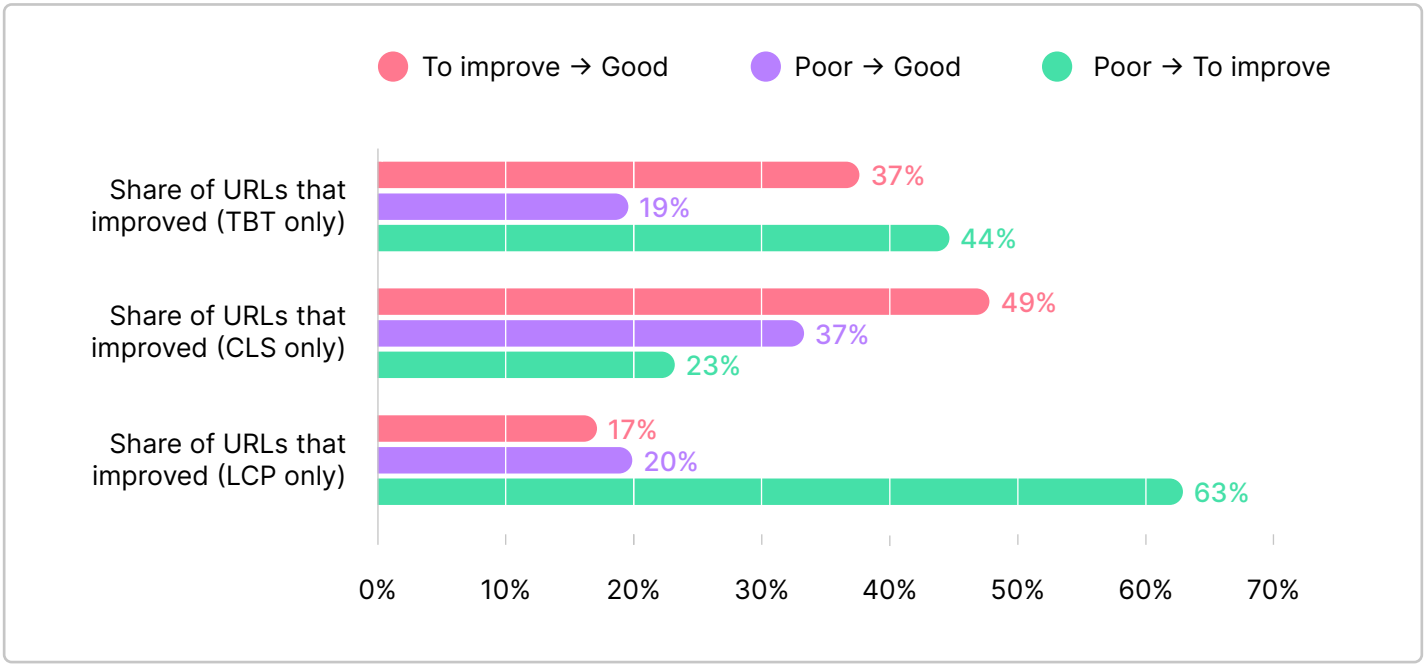


Out of all the URLs that we analyzed on mobile, only 0.1% showed improvement of any kind for all three metrics studied (LCP, CLS, and TBT to simulate FID). However, there were some improvements on individual metrics, with LCP proving the most difficult to alter.

The question is: how significant were these improvements?

To understand this, we looked at the percentage of improved URLs and the level of improvements made based on the three scoring categories.

Share of URLs Showing Shifts Between Thresholds on Mobile

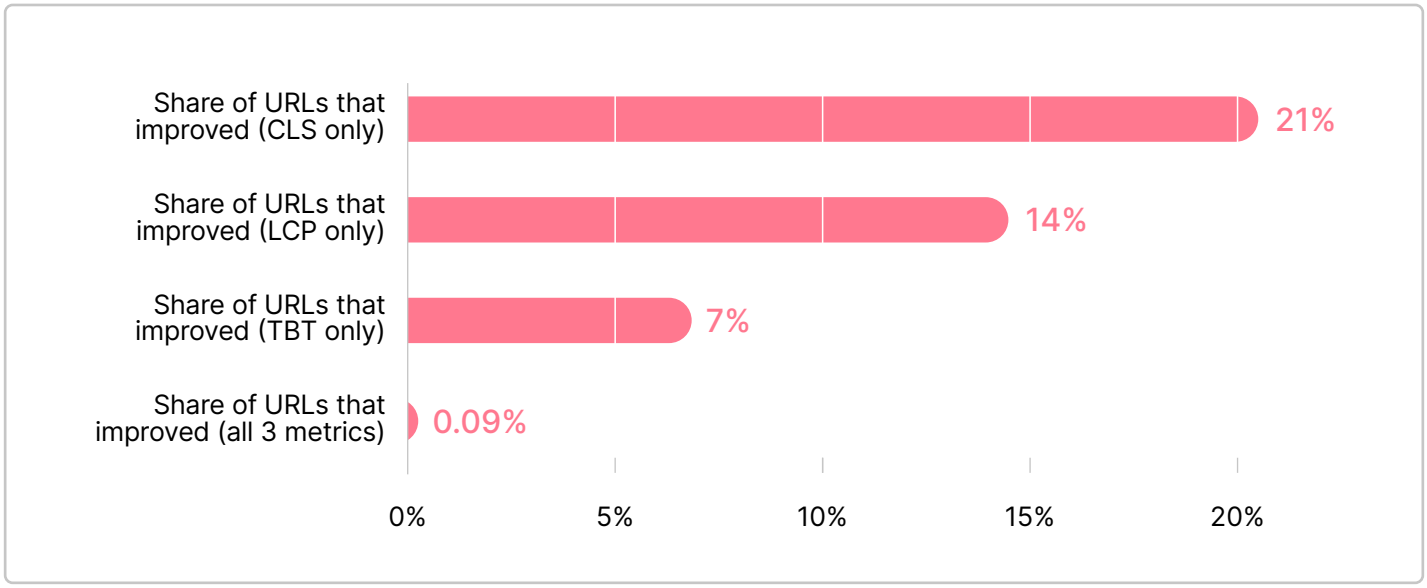


With regard to TBT, moving straight from a “Poor” score to a “Good” score was the most difficult to accomplish. Most of the improved URLs either moved from “Poor” to “To Improve” (44%) or from “To Improve” to “Good” (37%).

On LCP, most of the improvements took the URL from “Poor” to “To Improve” (63%), while CLS seemed to experience the greatest improvements to a “Good” score, whether the URL started at
“To Improve” (40%) or “Poor” (37%).

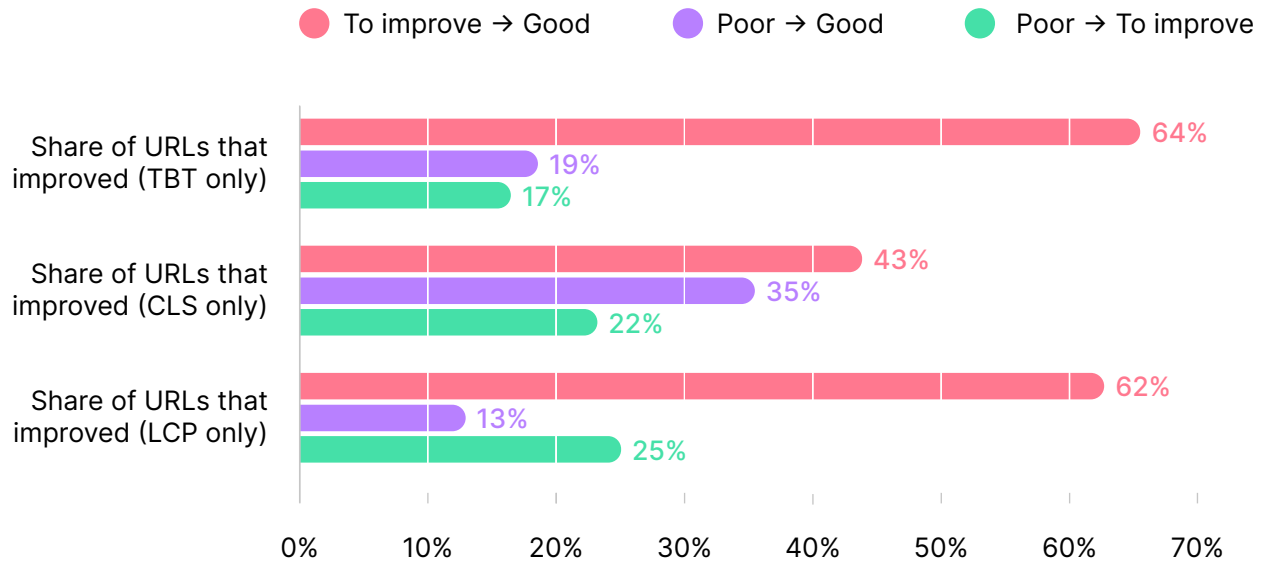
Desktop URLs

Share of URLs Showing Improvement Between Thresholds on Desktop



On desktop, the same amount of URLs showed improvement across all three metrics when compared to mobile: a mere 0.1%. There was, however, a noticeable difference in the percentage of URLs that were able to show some level of improvement in CLS and, more notably, LCP.

Share of URLs Showing Shifts Between Thresholds on Desktop



As with mobile, CLS displayed the greatest leap from “Poor” to “Good” (35%), while both TBT and LCP had huge movements from “To Improve” to “Good” (64% and 62% respectively).

Conclusion: The State of Search

The release of the COVID-19 vaccine has put the world on a new trajectory. It's also reset the organic marketing landscape. People are still spinning up new sites, just perhaps not with the same gusto as they did during the height of the pandemic. Organic traffic was up overall in 2021 but saw a downturn that began with the slowly reopening world.

Understanding that we are not operating in the same context as we were during the height of the pandemic, at least on the organic side of things, is vital for forecasting organic growth or for understanding your performance over the past year.

At the same time, it also means a lot is still left unresolved. Where will the dust settle when all of this is said and done? While it's highly unlikely that the organic landscape will return to what it was pre-COVID, we still don't know to what extent it won't. What will the new normal be?

The implications are endless and apply to whatever area of SEO or organic marketing you find yourself operating in. For the local SEO, how important will COVID-related attributes be in the future? Has the world set a new standard of hygiene expectation that will make these attributes important for years to come? Is that the new normal?

Will organic market share open up for eCommerce sites? Will Amazon continue to lose its grip on the SERP? Even if it does, will Google Shopping step in to replace it or will the average site have a real shot? Here too, what's the new normal in this space? How will competition grow? Will users still look towards digital options to the same extent? Will they still expect things like curb-side pickup even when the pandemic has passed us by?

Keep careful track of changes in patterns but don't rush to conclusions. Now more than ever it's important to carefully track what's happening to your site and what's happening within the ecosystem itself. The sands are still shifting and no one knows how it will all ultimately play itself out. Monitoring the situation carefully, more carefully than ever, is the best thing you can do for the success of your site or your client's site.

Mordy Oberstein

Author of the Report

Mordy is a renowned contributor to the SEO industry and has authored numerous studies on a variety of Search related topics. His widely shared insights have helped the SEO community better understand how Google's algorithm has evolved and how it often treats sites. A frequent speaker at industry conferences, Mordy is also the host of the SEO Rant Podcast and the co-host of the Edge of Web's weekly news podcast as well as the organizer behind Twitter's #SEOchat.

We love your feedback!

Did you enjoy the State of Search 2022?

We'd love to hear your thoughts. If you have any feedback or questions about our report, write to us at search2022@semrush.com

Thanks for reading!