Search, Reimagined by AI
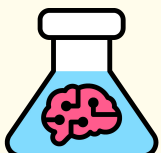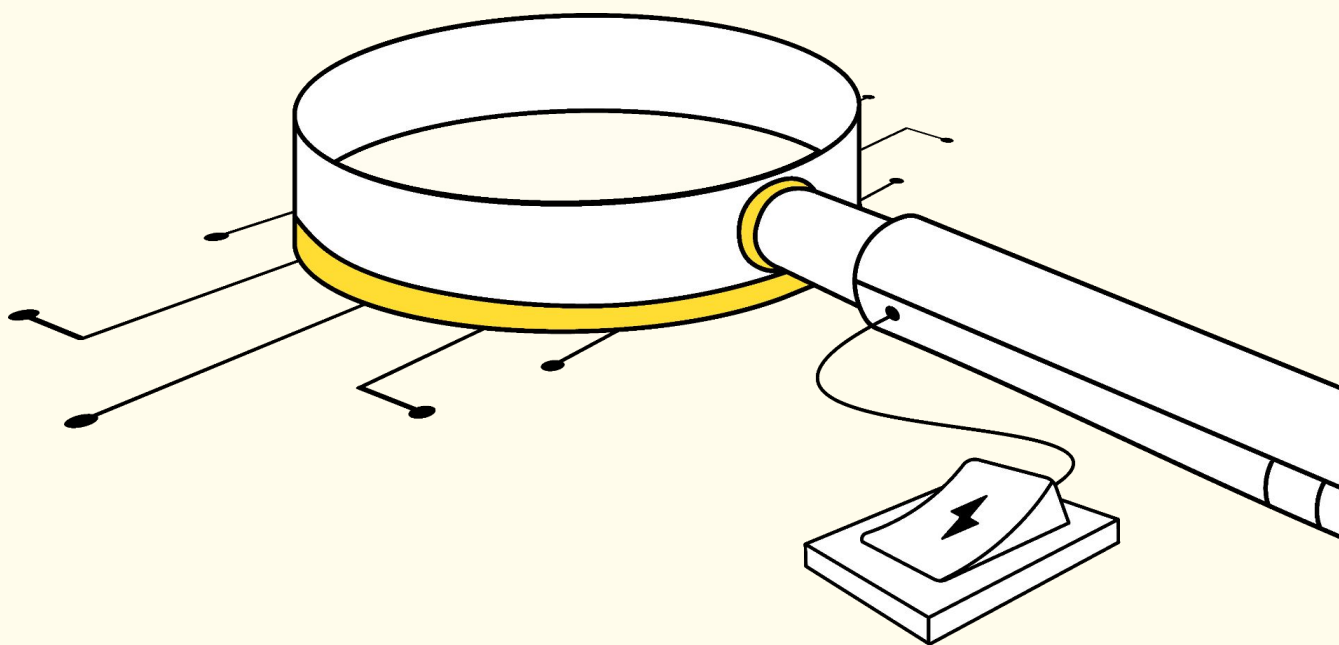
How to stay on top in a shifting landscape

brainlabs

Contents

1 AI Search & Its Evolution

AI Search refers to the integration of large language models (LLMs) — such as those powering ChatGPT, Gemini, Claude, and others — directly into the search experience. Rather than returning a traditional list of blue links, AI-powered search engines aim to synthesise information and deliver **conversational summaries**, often reducing the need for users to click through to a website.

Since ChatGPT's debut in November 2022, adoption has been rapid — reaching **500 million weekly active users by March 2025**, up from 300 million just three months earlier, and helping push OpenAI's annual run-rate to **nearly $10 billion**. This surge signalled a broad user appetite for natural-language search, prompting rapid responses from competitors.

Google launched its **Search Generative Experience (SGE)** in May 2023, later rebranded as **AI Overviews** in 2024. These results appear at the top of some search pages, offering AI-generated summaries that pull together **facts, advice, and insights from multiple sources**, often accompanied by citations or product listings. By October 2024, AI Overviews were live in over **100 countries**, and are now shaping a global redefinition of what it means to "search."

01 Conversational Query

02 Source Attribution

03 Structured AI Answer

01 Conversational Query
Natural-language phrasing triggers AI Overviews, especially for instructional queries.

02 Source Attribution
AI Overviews cite websites that informed the AI output, offering transparency to users.
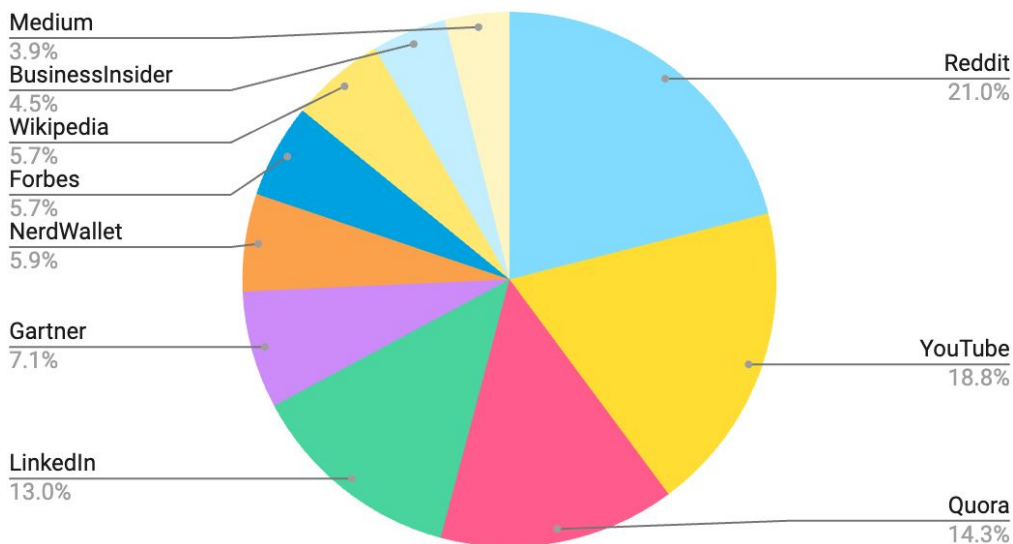
03 Structured AI Answer
AI formats the response for clarity, often providing summaries, lists, and step-by-step instructions.

This marks a shift from **indexing** the web to **interpreting** it. AI Overviews don't just point to information — they attempt to answer it directly.

Google AI Overviews Citation Patterns

Medium
3.9%

BusinessInsider
4.5%

Wikipedia
5.7%

Forbes
5.7%

NerdWallet
5.9%

Gartner
7.1%

LinkedIn
13.0%

Reddit
21.0%

YouTube
18.8%

Quora
14.3%

The nature of citations within AI Overviews also reflects a major structural change. As shown in Profound's study of 10 million citations (Aug 2024 – June 2025), Google's AI summaries **source consistently from a group of well-established platforms:**

- **Reddit (21%), YouTube (18.8%), and Quora (14.3%)** lead the way, ahead of traditional sources like **Wikipedia (5.7%)** or **Forbes (5.7%).**
- **Professional and peer-generated content** (LinkedIn, Gartner, NerdWallet) is increasingly cited, signaling a move toward more community-driven and experience-based authority.

This evolving dynamic — where **unstructured forums, video, and user-generated content fuel AI answers** — is already influencing how content should be created, structured, and optimised for visibility in generative SERPs.

As platforms like Bing + Copilot and Perplexity.ai iterate on their own models, and publishers seek compensation or visibility within AI systems, the battle for **influence within AI summaries** is becoming a key battleground for SEO.

(2) Should We Be Panicking?

The emergence of AI-powered results in search — particularly with the rollout of Google's AI Overviews — has stirred anxiety across the SEO and publishing communities. The fear is familiar: if generative summaries answer users' questions directly, will anyone still click through to our websites?
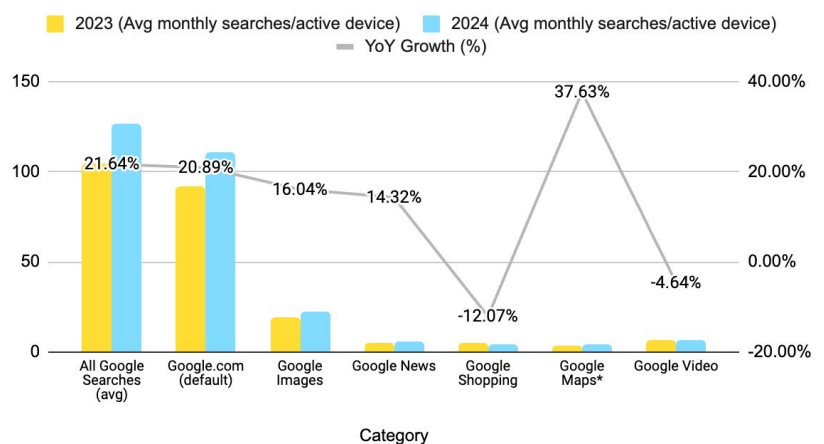
But while this shift is undeniably significant, *the data and direction suggest that panic may be premature — or at least misplaced.*

Search Volumes Are Still Growing

Despite fears that AI would cannibalise traditional search, usage is not declining. In fact, it's increasing.

According to SparkToro's analysis, Google searches grew 21–22% year-over-year between 2023 and 2024. That's billions more queries — and more signals of intent. The rise in generative tools has not replaced search; if anything, it has retrained users to ask more complex, natural-language queries, expanding the total volume of interactions with search engines.

Growth of Google Searches from 2023-2024

Legend: ■ 2023 (Avg monthly searches/active device) ■ 2024 (Avg monthly searches/active device) — YoY Growth (%)

Data points (YoY Growth %): All Google Searches (avg) 21.64%, Google.com (default) 20.89%, Google Images 16.04%, Google News 14.32%, Google Shopping -12.07%, Google Maps* 37.63%, Google Video -4.64%

Google's Take: An Evolution, Not a Revolution

In May 2024, Sundar Pichai described AI Overviews as **"one of the most successful launches in Search in the last 10 years."** But he also emphasised that this was not a sudden upheaval, but rather the latest step in a much longer journey:

> *"Search has been evolving continuously — from ten blue links to featured snippets to voice search and now generative results. This is part of that trajectory, not a break from it."*
>
> *— Sundar Pichai, Google I/O 2024*

Search engines have long been moving toward **answer-first experiences.** AI Overviews simply take that progression further — with more synthesis and conversational tone.

A Measured Approach: Regulation, Quality & Risk

Crucially, Google is not rolling out AI Overviews indiscriminately. The company has applied **strict safeguards in high-risk categories** such as health, finance, legal advice, and elections. As reported by Wired and BrightEdge, Google **deliberately reduced the frequency of AI Overviews shortly after launch**, particularly when responses risked hallucination or misinformation.

This indicates a company aware of the stakes — and one that is pacing its changes accordingly.

Redefining Success: Beyond the Click

Much of the panic in SEO stems from the growing share of **zero-click searches** — those that resolve a user's query directly on the results page, with no need to visit a third-party site. But as Rand Fishkin, co-founder of SparkToro, argues, that metric can be misleading:

> "Zero-click searches have grown … but traffic was always a vanity metric — **sales are what really matter.** If you're optimising for brand awareness, visibility, or direct conversions, your strategy needs to evolve with the SERP."
>
> — *Rand Fishkin*

What's emerging is a new kind of SEO performance model — one that values **impressions, AI inclusion, and brand exposure** alongside click-throughs. For many brands, being cited or synthesised in an AI Overview can still drive long-term value, even if it doesn't always register in GA4.

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3 · The Biggest Changes: Rise in Zero-Click & the 'Crocodile' Curve

The Zero-Click Explosion

The most visible and immediate consequence of AI Overviews is the sharp **decline in user clicks**. As Google shifts from showing blue links to **answering questions directly within the results page**, the need to visit a website diminishes — particularly for top-of-funnel and factual queries.
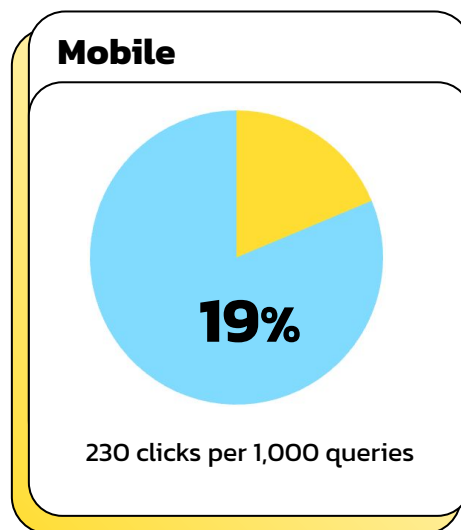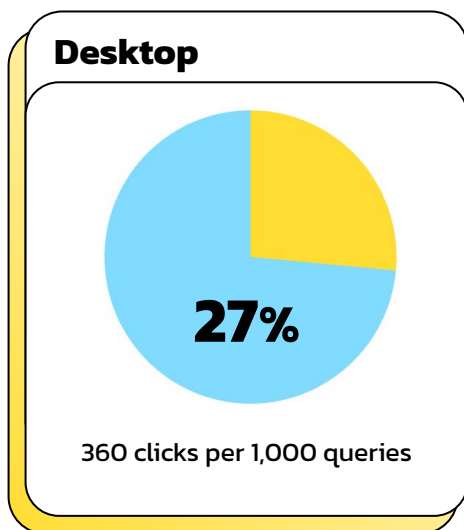
According to SparkToro's analysis, by the end of 2024, approximately 59% of U.S. searches ended without a single click. The effect is even more pronounced on mobile, where screen space is limited and AI modules dominate the visual hierarchy:

59% of searches end without clicks

Desktop

27%

360 clicks per 1,000 queries

Mobile

19%

230 clicks per 1,000 queries

This growing share of **zero-click searches** is redefining what success in search looks like — especially for publishers and brands that previously relied on high visibility in organic listings.

Click-Through Rates Are Declining

BrightEdge reports that while **search impressions are up 49% year-on-year, click-through rates have dropped by 30%** across industries — a trend attributed largely to AI Overviews, featured snippets, and other SERP features that **satisfy user intent without requiring a website visit**.

This shift reflects a growing disconnect: **content is still being surfaced, but not necessarily engaged with in traditional ways.**

The "Crocodile" Curve in Search Console

In practical terms, marketers are now observing what's known as the **"crocodile effect"** in Google Search Console. This describes a widening gap between **rising impressions and declining clicks** — a visual divergence that resembles the open jaws of a crocodile.

Impressions

Clicks

Jul 2024   Sep 2024   Nov 2024   Jan 2025   Mar 2025
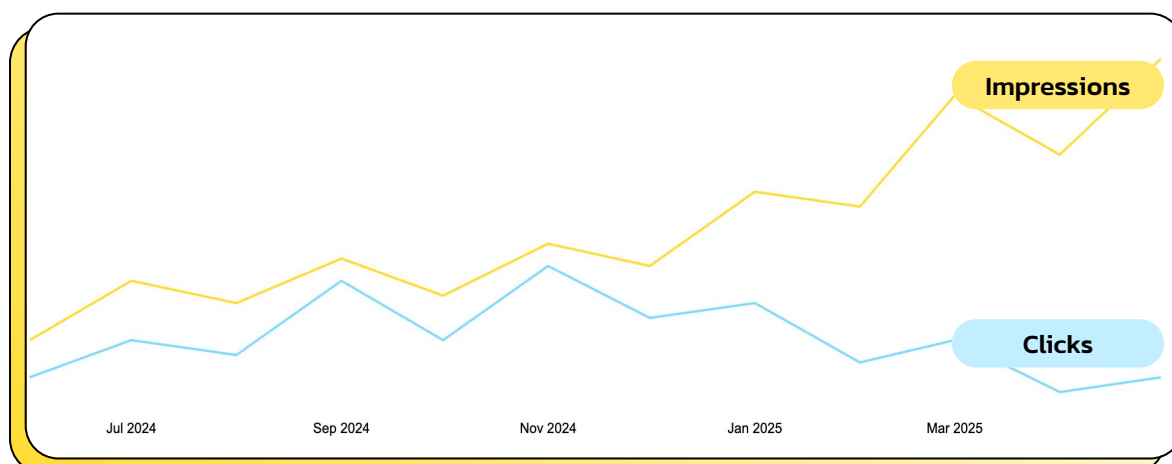
This phenomenon is especially visible in top-of-funnel content, where AI Overviews now "answer the question" without a click. For SEO practitioners, it presents a paradox: your content may be working — it's being seen and synthesised — but not driving measurable traffic.

The implication? **Visibility no longer guarantees engagement**. Winning the impression is no longer the same as winning the visit.

For brands and publishers, adapting to this new model means rethinking SEO performance — placing greater value on **brand inclusion in AI answers, structured content that feeds LLMs, and SERP real estate beyond just links**.

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4 · Who's Most Affected? and Where AI Steps In

The impact of AI Overviews isn't evenly distributed. **Industries that rely heavily on top-of-funnel, informational content** — particularly those offering general knowledge, advice, or educational materials — have been the most disrupted by the rise of AI-powered search summaries.

Industries Hit the Hardest

According to BrightEdge's industry breakdown of AI Overview coverage (May 2024 to May 2025), sectors like **Healthcare, Education, and B2B Tech** have seen the steepest increases in AI result penetration:

All content © Brainlabs APAC 2025
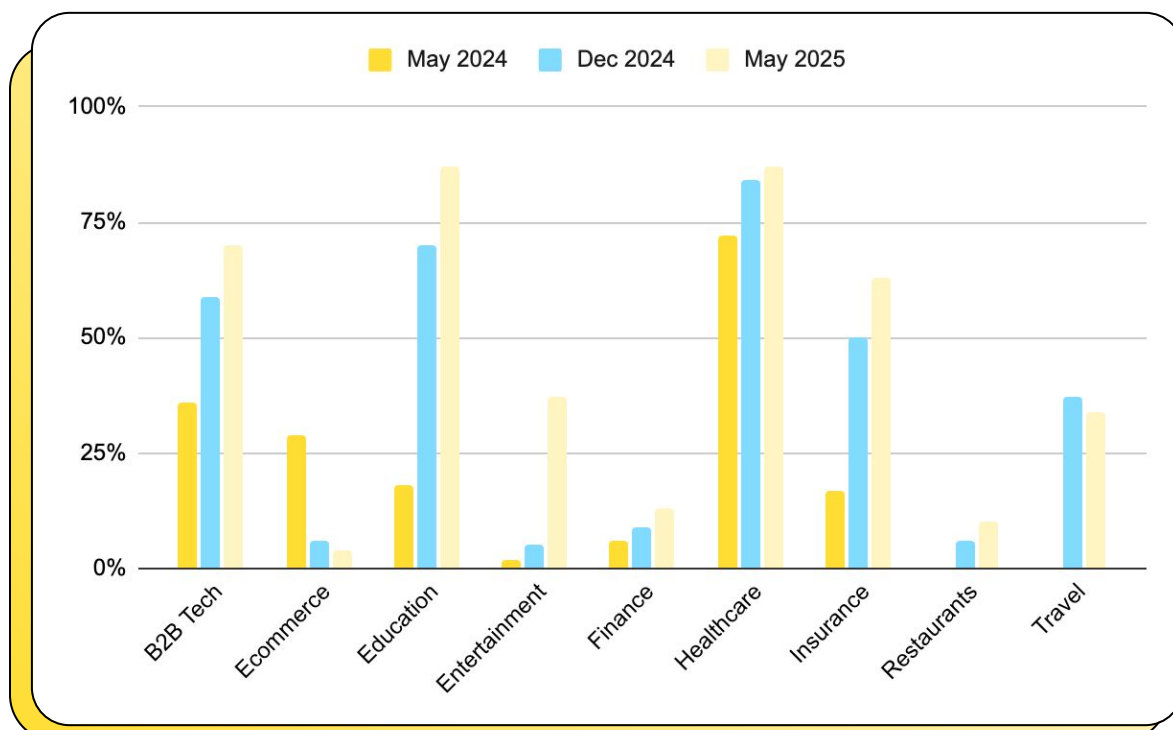
Healthcare

surged from 72% in May 2024 to **87% by May 2025**, becoming the most exposed industry to AI Overview formatting.

Education

jumped from just 18% to **87%**, a dramatic 69-point increase, suggesting that general academic queries are increasingly answered by AI.

B2B Tech

rose from 36% to **70%**, reflecting the shift in how complex technical explanations are being summarised by AI models.

Insurance & Entertainment

also saw notable jumps, with Insurance climbing from 17% to **63%**, and Entertainment (formerly negligible at 2%) now at **37%**.

eCommerce & Restaurants

remained comparatively insulated, with eCommerce dropping to just 4% and Restaurants only reaching 10% — indicating that **AI Overviews are currently less likely to interfere in transactional or hyper-local queries**.

Query Theme – Where AI Overviews Appear Most

Beyond industry classifications, **thematic query intent** is a strong indicator of AI impact:

Informational Queries

have around a **25% likelihood** of triggering an AI Overview. These include "what is…", "how to…", "why does…" style searches.

Health–related Queries

show **extremely high coverage** — corroborated both by BrightEdge's 87% industry data and other studies placing it around 58–63%.

Food & Beverage

especially **recipe and ingredient-related** searches, remain some of the most consistently covered in AI Overviews.
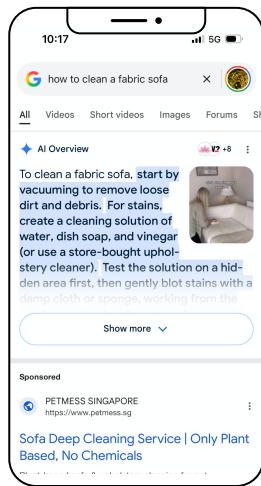
News & Politics

are notably **underrepresented** in AI Overviews, likely due to concerns about hallucination, misinformation, and the need for real-time content accuracy.
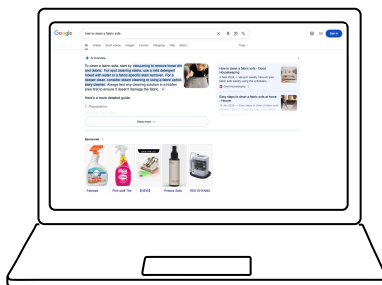
Device Split – Mobile vs Desktop

The user's device also affects the visibility and clickthrough dynamics:

On **mobile**, AI Overviews often occupy more prominent real estate. Combined with shorter attention spans and space constraints, this results in **~77% of queries ending in zero clicks**.

On mobile,
77%
of search queries end in zero clicks

On **desktop**, users are more likely to scroll and explore full SERPs, meaning **about 50% of clicks** still go to organic listings — offering a greater opportunity to capture traffic beyond the Overview.

On desktop,
50%
of search queries click into organic results

5 · How is Strategy Changing?

As AI Overviews reshape the SERP experience, SEO strategy must evolve from simply "ranking well" to **earning presence, trust, and action** across a fragmented search landscape. The new playbook is about designing content and structure for every part of the funnel — and across both human and AI interpreters.

Top-of-Funnel (Informational)

At the awareness stage, AI Overviews are most prominent — summarising broad queries and pulling from multiple sources. Winning visibility here is no longer about #1 rankings, but about **being cited and synthesised.**

› How to adapt?

01

Structured Content for AI Comprehension

Use clear headings, concise paragraphs, bullet points, and consistent terminology to make your content easier for LLMs to parse and cite.

02

Deploy FAQ Schemas & Named Entities

Mark up your content using structured data so that Google understands the context and relevance of each section.

03

Create GEO (Generative Optimised) Content

Think like a model — provide crisp definitions, authoritative explanations, and unambiguous facts. Aim to be the "source of truth" for AI tools.

Even if clicks don't follow, **brand exposure within AI Overviews** can drive downstream awareness, search demand, and trust.

Mid-Funnel (Consideration)

This is the phase where AI results **appear intermittently** — often supplementing, but not replacing, traditional organic listings. Users here are comparing solutions, asking nuanced questions, or navigating options.

› **How to adapt?**

01
Balance AI & Traditional SEO Strategy

Google may show an AI Overview above product comparison results — but often still prioritises classic blue links here. Optimising for both is key.

02
Reddit & Community Content Matter

As seen in AI citation data, platforms like Reddit (21% share of citations) and Quora (14%) are highly influential. These forums often shape AI responses and SERP inclusion. Consider participating in or optimising for these sources.

03
Invest in Rich, Interactive Content

Tools like comparison tables, cost calculators, "which is best for me" quizzes, and in-depth guides prompt users to click and explore — essential for moving users from impression to consideration.

This part of the funnel offers a **click opportunity**, especially if the content builds confidence and reduces friction.

Bottom-of-Funnel (Conversion)

AI Overviews rarely interfere here — and that's a good thing. Transactional, high-intent queries (e.g., "buy X," "book Y," "sign up for Z") are less likely to trigger generative summaries, meaning traditional SEO and paid listings retain dominance.

› How to adapt?

01
Double Down on CTR-Enhancing Elements

Pricing schema to show cost upfront.

Availability/inventory markup to display urgency and stock.

Trust signals like ratings, secure checkout badges, and return policies.

02
Simplify Conversion Paths

Ensure mobile-first UX, fast loading speeds, and seamless checkout flows.

03
Use Paid & Organic in Tandem

Bidding on branded or high-converting terms reinforces visibility, especially where organic performance might be impacted by competitor schema or vertical-specific SERP features.

Bottom-of-funnel remains a **defensible zone** — but only if you're technically sharp and friction-free.

6 — Rethinking the Value of SEO: What We Should Start Doing Now

The rise of AI Overviews and zero-click searches forces a fundamental question: **What does success in SEO really look like today?**

For some brands — especially publishers and media — **clicks remain the lifeblood**. Traffic equals ad revenue. For others — like SaaS companies, ecommerce, and B2B services — the goal isn't traffic for its own sake. It's **qualified demand, conversions, and brand trust**.

In this new landscape, **SEOs need to rethink their KPIs**. It's not just about getting more visits — it's about winning attention where it matters, and driving value from the visibility you do earn, whether or not it results in a click.

Here's how to adapt:

Audit Zero–Click Exposure

Use Google Search Console to identify **high-impression, low-click queries**. These are likely candidates for AI Overviews or feature-rich SERPs.

Ask: Is this query still worth targeting for traffic — or should I shift focus to influence, visibility, or brand recall instead?

Optimise for AI Overviews

To show up in AI summaries, structure your content with **bullet points, clear headings, FAQ schema, and factually concise answers**.

Even if it doesn't result in a click, being cited by AI helps build **brand credibility and recall**.

Focus on Outcomes, Not Just Visits

For product-led and service-led brands, clicks are just a means to an end. Refocus your SEO goals on **actions that matter**:

- Conversions
- Lead generation
- Demo sign-ups
- Store visits
- Assisted sales influence

This may mean investing less in traffic-heavy blog posts and more in **high-intent landing pages, product FAQs, and mid-funnel resources**.

Build Rich Mid–Funnel Content

Don't just answer — **engage**. Use:

- Interactive tools (calculators, configurators)
- Comparison pages
- Explainer videos
- Downloadable guides

These help **differentiate your brand** in a landscape where information is increasingly commoditised by AI.

Track Category–Level AI Impact

Some industries are hit harder than others. Regularly monitor how often your queries are generating AI Overviews or rich results.

Ask: Is my space mostly navigational and transactional — or is AI eroding my traffic share?

Diversify Beyond Google

Relying solely on Google clicks is increasingly risky. Explore **alternative surfaces**:

- Social search (TikTok, Reddit, YouTube, Pinterest)
- Email marketing
- Owned apps
- On-site communities

The future of discovery is multi-platform — and Google is no longer the only gatekeeper.

Explore AI Partnerships

Large LLM providers are beginning to **license content and sources**. Consider whether your brand should play in this space — especially if you're a knowledge authority in a niche.

Continuously Test & Adapt

SEO success will depend more than ever on **agility**. Test:

- Schema variations
- Snippet formats
- Headline structures
- Internal linking models
- Content layout for AI readability

Let data — not assumptions — guide what to scale and what to sunset.

In short: **stop chasing clicks, and start chasing value**. The best SEOs in 2025 won't just rank — they'll shape outcomes across the funnel, regardless of whether the user ever lands on their site.
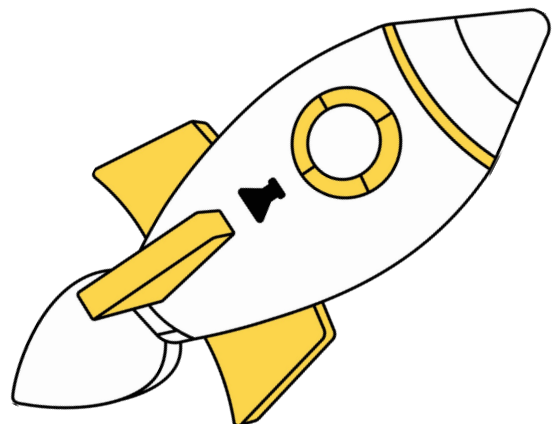
7 Closing Thoughts

SEO is no longer just a game of rankings and clicks — it's a battle for visibility, trust, and relevance in an AI-shaped landscape.

Winning today means showing up where it counts, even if the click never comes. The brands that thrive won't be the ones chasing traffic — they'll be the ones shaping outcomes, building credibility, and meeting users wherever intent lives — AI summaries, forums, video, or the search box itself.

The future of search isn't less valuable — it's just less linear. And the smartest SEOs are already adapting.

> *"It's neither going to be a disaster and it's neither going to be an AI paradise."*
>
> – Michael Bonfils, SEM International

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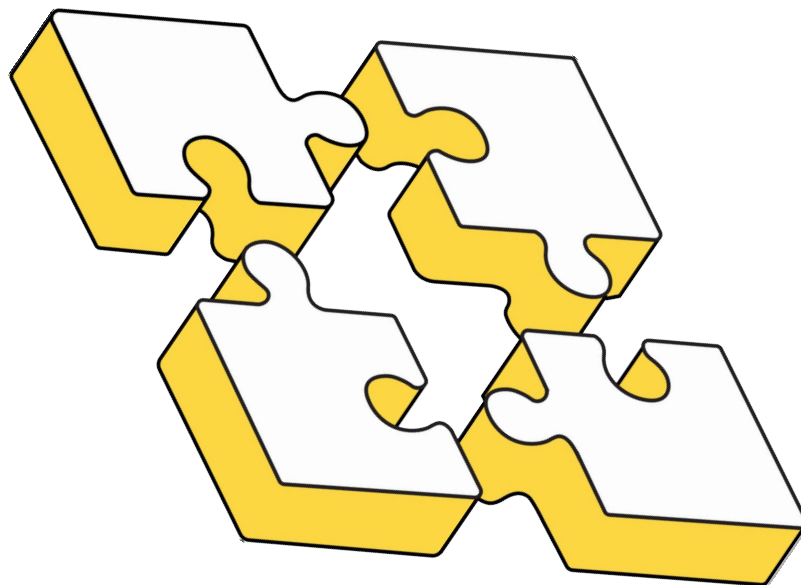
Robin is a versatile performance marketer with extensive experience working with blue-chip clients such as Google, Unilever, Amazon, and Netflix, as well as in-house experience at TikTok.
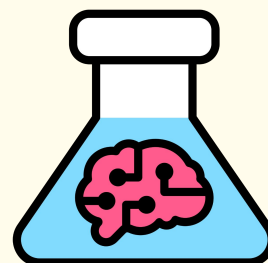
Throughout his career, Robin has led projects spanning Content, CRO, CRM, and Creative, while maintaining a strong passion for Search Marketing. With a deep understanding of the full marketing mix, he delivers high-impact SEO projects that drive significant results and enhance cross-channel performance.

About Brainlabs

Brainlabs is the Real Intelligence agency with a global footprint in APAC, North America, Europe and LATAM. We plan and buy media that delivers profitable and sustained business impact, and also drive measurable, sustainable growth.

What's our formula? Superteams of Brainlabbers, fueled by data and enabled by technology.

Connect with us today to find out more!

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