

State of Search

August 2025

Michael Payne
MP Search



Executive Summary

- ❑ As we enter the AI era, traditional search is transforming into a more conversational, generative experience. AI is augmenting search, not replacing it. It's a natural extension of organising the world's information and make it more useful. This change requires a strategic mindset shift.
- ❑ This comes with some behavioural shifts which mean that the way we report and attribute will need to change.
- ❑ There is significant overlap between existing best-in-class SEO strategies and those that are effective to appear in AI search, meaning SEOs are best placed to guide you into this new era.

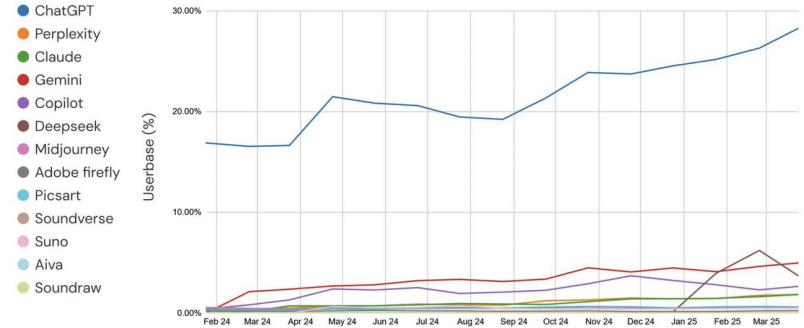


Usage Landscape

- ❑ Google received almost 14 billion searches per day through 2024, which is **up 20% against 2023 and 373x more than ChatGPT**. Even if ChatGPT is growing rapidly, it is still miniscule to Google.
- ❑ **Google still holds 93% of the global search market**, with AI search platforms at around 1%. This 1% is dominated by ChatGPT as the household name. Research also shows that the majority of users of ChatGPT are still using Google too. **It is not a case of switching behavior, more of an expansion of behavioural routes for different use cases.**
- ❑ Google traditional search is still thriving, but there are now more ways for people to find your brand. **The aim now is to identify what methods our target audience are using, and optimise accordingly.**

AI Platform Growth and Engagement

Monthly share of users of major AI websites
(USA, Jan 2024 – Mar 2025)



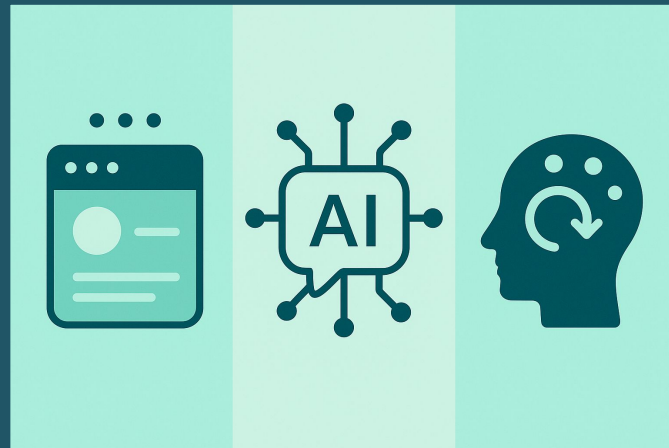
 **Datos**
A Semrush Company

Source: Datos

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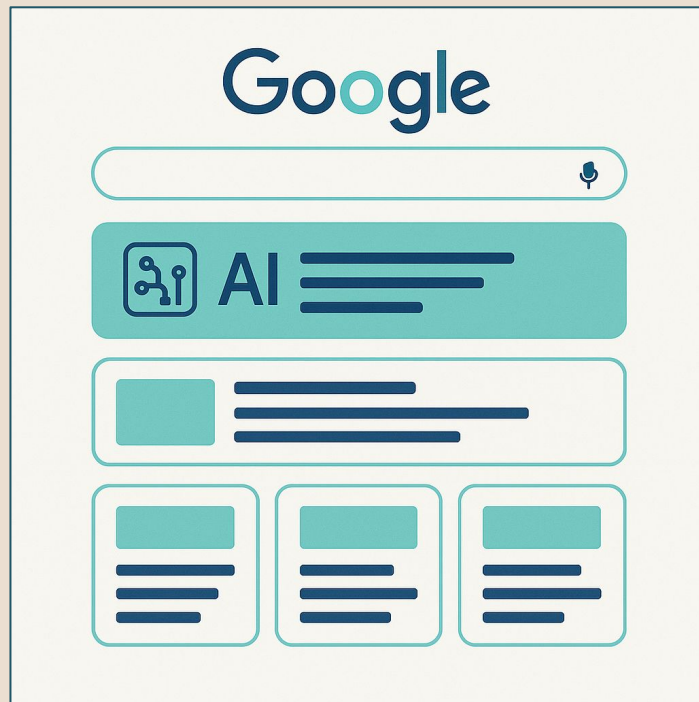
The Three Shifts Reshaping Search

- ❑ **Google is evolving through AI Overviews.** These are a progression of featured snippets, using AI to pull answers to complex and informational queries and enhancing your SERP experience. These overviews synthesize facts, concepts, and summaries across multiple sources.
- ❑ **Generative Assistants are the new discovery gatekeepers.** All of the new AI search platforms condense your search journey, **combining sources across the web into a single comprehensive and multi-sourced answer.**
- ❑ **Complex user behaviour.** With Google moving into its AI-first era coupled with the growth of AI search methods, **online behaviour is shifting from static searching to conversational searching.** Ranking is no longer determined by exact-match phrases. It's determined by how well your content reflects and reinforces the concepts, entities, and context behind a query, **and this requires a broader remit for organic search efforts.**



AI Overviews: The New “Position Zero”

- ❑ **AI Overviews occupy prime real estate:** They almost always appear at the top of the SERP, pushing other sources down.
- ❑ **SERP Features are disintegrating:** The growth of AI overviews has caused a 64% drop in featured snippets, with other features like People Also Ask, Maps and Videos being pushed down the page. **AI overviews are becoming the catch all position zero feature**, regularly including multimodal content.
- ❑ **“Decoupling” of impressions and clicks:** This is causing “the great decoupling” where sites are experiencing stable or rising impressions but drops in clicks as searchers have less incentive to click through to websites. However, if your site is frequently referenced, it builds brand authority and implicit trust.
- ❑ **AI Overviews follow traditional guidance:** Generation of AIOs follows the exact same infrastructure, signals, and systems as traditional blue links. **The core principles of creating helpful, reliable, people-first content remain the foundation for visibility.**



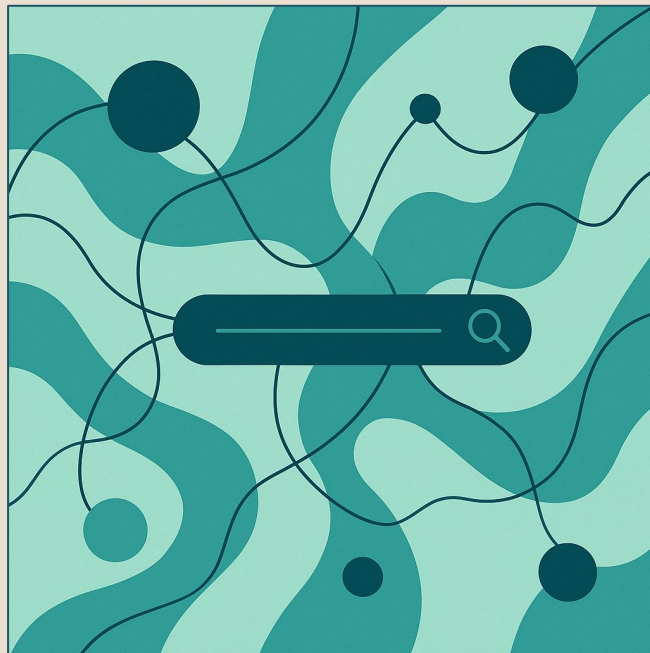
Generative Assistants: The New Search Gatekeepers

- ❑ **Key players:** Since the birth of generative AI for search, multiple players have entered the market with the frontrunners being Google Gemini, ChatGPT, Claude and Perplexity.
- ❑ **Conversational search:** The key function of these platforms is to condense multiple sources to provide a comprehensive answer to your query in one instance, and this is only going to expand. **The key difference is “answers”, not “results”.**
- ❑ **How content is used:** The difference is that in traditional search, your content comes out the same way it goes in. **In generative search, your content is manipulated and meshed with other content from other providers.**
- ❑ **Knowledge graphs:** Generative engines interpret meaning through structure, relationships and contextual signals.



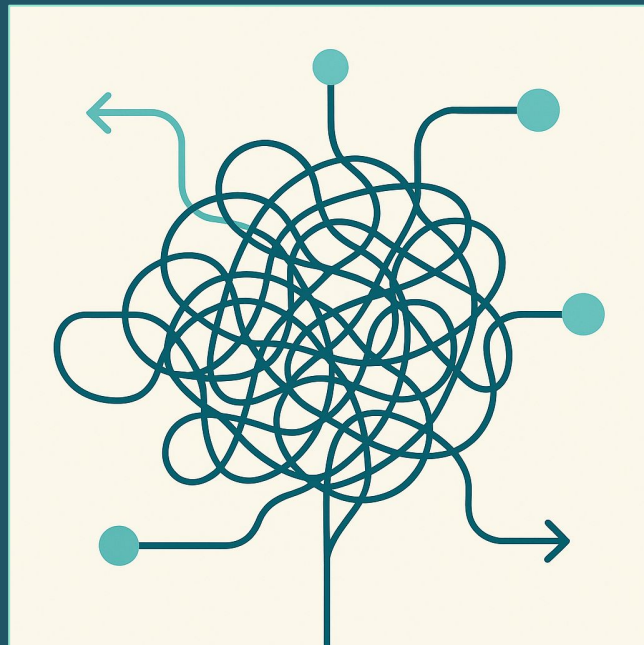
How is this Affecting User Behaviour?

- ❏ **Complex search patterns:** With multiple ways to search, the already convoluted buyer journey has become even more complex, with various new platforms that can be used as a part of the journey to conversion.
- ❏ **Rise of conversational, no-click searches:** The new AI experiences aim to answer your questions in one query, **which means a lot of searches do not result in clicks through to the websites that the information has come from.**
 - ❏ This is especially true for ChatGPT and Claude as pure answer engines, whereas Perplexity always aims to cite the content used as a generative engine.
- ❏ **Declining click-through rates from traditional organic listings:** AI overviews reduce clicks by 34.5% for the top performing page, **and nearly 60% of searches no longer result in a click.** Google's top organic CTR dropped from 28% to 19% following the expansion of AI Overviews. Position 2 dropped from 20.83% to 12.6% YoY



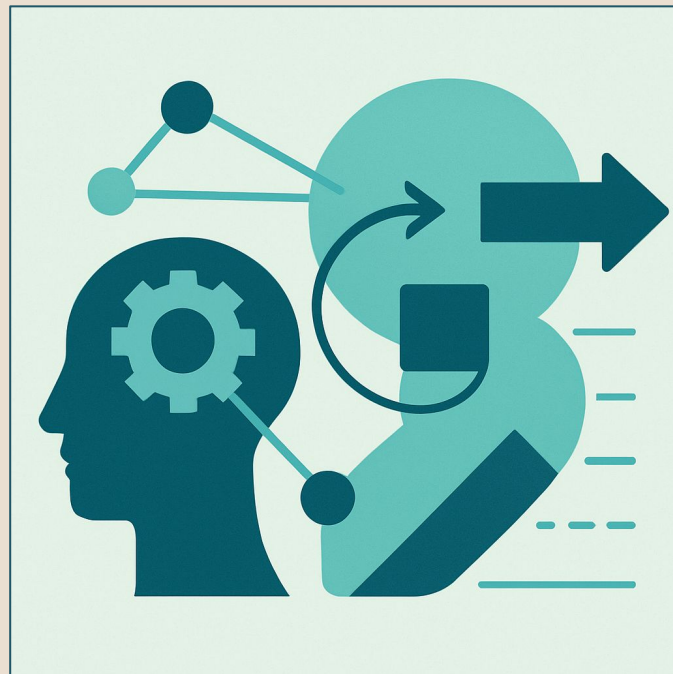
Reporting, Measurement, and Attribution Challenges

- ❑ **Google proving unhelpful:** With AI Overviews and AI Mode, **Google is grouping all clicks together with no way of breaking down per mode In Search Console**, making it impossible to monitor performance.
- ❑ **LLMs even worse:** None of the major platforms are providing any type of analytics at present, leaving marketers in the dark. The first to do this will have a good advantage in the market.
- ❑ **Attribution difficulties:** Traffic is falling, referral strings are being removed and privacy and cookie laws are tightening. **The future of channel level attribution is at risk.** Taking a more holistic reporting approach with lift-based testing may be the best route forwards.
- ❑ **New metrics:** Whilst traditional SEO metrics are still important, these will need to be broadened out to reflect the changing landscape of organic search.



Strategic Mindset Change

- ❑ This industry shift can be simplified down to a broadening of options available to search. We are moving from asking “what keyword should I optimise for to appear in Google?” to **“where do my customers search for me and what questions should I answer?”**
- ❑ The shift means that instead of being presented with lots of options and having to complete multiple searches, **the AI is combining sources to deliver a comprehensive answer to our searches.** We need to ensure we appear in the multi-source answer amongst other sites, and that our part is so compelling that they remember us.
- ❑ This change in dynamic means **we need to track new AI-based metrics.** With the lack of analytics from the key players, this pushes us to gap fill with third-party tools providing synthetic prompt data to give an indication of performance and progress.



**So what do we need to do
to be visible across all
methods of search?**

Ongoing Importance of Google

- ❑ With the continued growth in searches and most sites having Google as one of their primary traffic drivers, **it is important not to discount Google from our ongoing efforts.**
- ❑ **Sites that historically perform well in Google Search also perform well in AI overviews, Perplexity and ChatGPT,** showing synergy between the recommendations we should apply for each.
- ❑ Google's AI Overviews and AI Mode are pulling from Google's own index to generate answers, and there is now data available to show **that both ChatGPT and Perplexity also utilise Google's API to pull out data at scale for use in their own software.**
- ❑ If your site is not crawled, indexed or discoverable already via organic search, **you're at a disadvantage for appearing in AI search platforms.**



Significant Overlap with Traditional SEO

Despite the hysteria that SEO is dead and GEO is a completely different discipline, there is considerable overlap between an AI-first strategy and a traditional SEO strategy, with the below pillars applying for both:

- ❑ **Create unique and helpful content**
- ❑ Make your site **technically healthy and easy to crawl**
- ❑ Prove you deserve to appear through **E-E-A-T**
- ❑ Build backlinks from **authoritative and relevant sources**
- ❑ Implement effective **international SEO** measures (global businesses only)
- ❑ Implement effective **local SEO** measures (local businesses only)
- ❑ Use data to determine **tests and tweaks**

SEO teams approaching their work the right way are at a major advantage for encouraging content and brands to appear in AI search results.

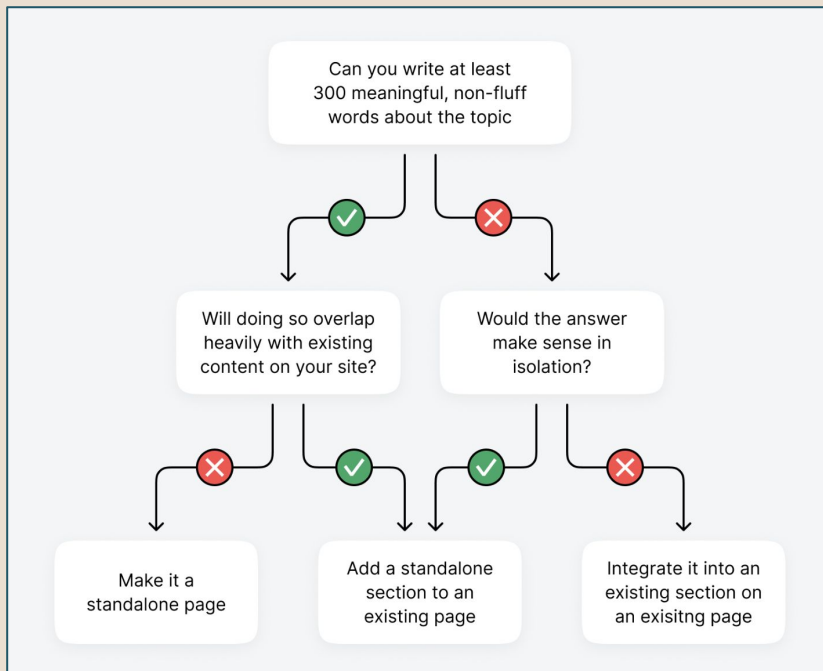
Few professionals are more qualified to help lead clients into the future of AI search than those with experience earning visibility in search engines.

Many of the same tactics that generate AI search visibility turn out to be common SEO approaches, only now wearing a shiny new "AI" hat.

Source: [Search Engine Land](#)

The Truth Behind the New Tactics

- ❑ **Fanning out content:** This is a new fancy way to say topic clustering. It's the process of creating content to cover related areas to your original piece of content, **to fully champion the subject area**. You can however use AIs to determine what is in the cluster.
- ❑ **Content chunking:** This is the process of splitting your content into small bite size chunks to make it easy for AIs to understand and pull out. **However, chunking is not a lever you can optimize directly**. Chunking happens inside model pipelines, none of which respond to our content layout. **The system, not our formatting choices, decides what counts as a "chunk" and how it's sliced**. It is best practice to use headings to separate out content, but not to specifically "chunk" it.



Source: [Ahrefs](#)

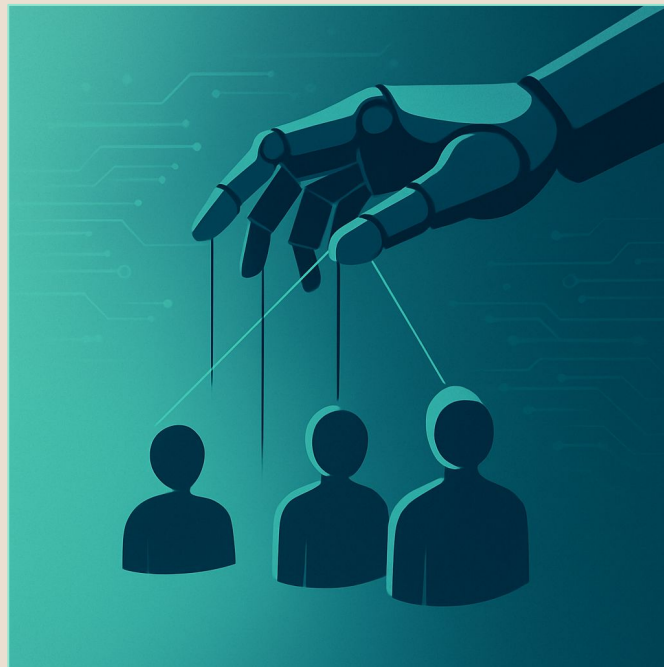
Areas with Increased Emphasis

- ❑ **Content coverage and type:** The more content we have and how well we answer queries, **the more likely we will appear in AI search results.** Think comprehensive guides that go beyond surface-level information, whitepapers that leverage your company's unique insights and data, and case studies showcasing real-world applications and results. AIs love stats!
- ❑ **Structured data:** AIs have been proven to use structured markup to determine the purpose of content, so this is essential.
- ❑ **Multi-modal content:** AIs show more than just HTML content, so ensuring you have the relevant content type available is paramount.
- ❑ **E-E-A-T:** AIs use the same authority signals that Google has for years, so ensuring you demonstrate expertise, experience, authority and trust has never been more important
- ❑ **Semantic HTML:** [These AI systems don't browse your site. They don't scroll. They don't click. They parse.](#) Making our HTML code make sense, makes this easier.
- ❑ **User-generation platform focus:** Reddit and Quora have long been pain points for SEOs, but they are two of the most successful sites in AI search platforms to provide an opinion piece. Ensuring we are a part of the conversation on those platforms is becoming more important.



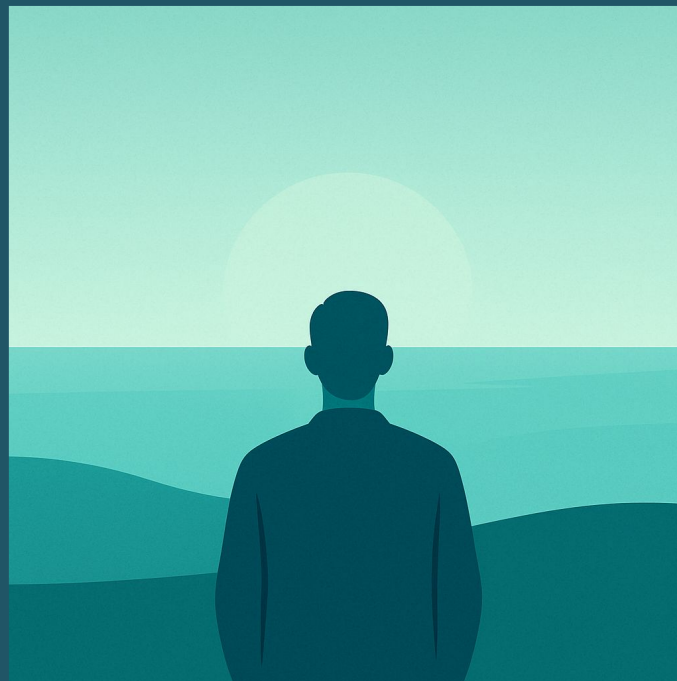
The Return of Black Hat

- ❑ **There are currently ways to manipulate AI platforms into showing your content**, or into repeating a particular phrase in answers. This is done through having lots of sites answer the same question in the same way about your brand.
- ❑ This is because AIs are probabilistic whereas search engines are deterministic. **This means that they show what is probably the best information**, as opposed to determining the nuance behind it. A repeated phrase appearing all over the web qualifies as high probability to be correct. **However, doing this could be detrimental to traditional SEO efforts, and it is likely the AI platforms over time will stamp out this vulnerability.**
- ❑ On top of this, there is an enormous amount of fake AI performance claims all over the internet. **Don't be fooled by a chart going up as in the AI era, these are super easy to fake.**



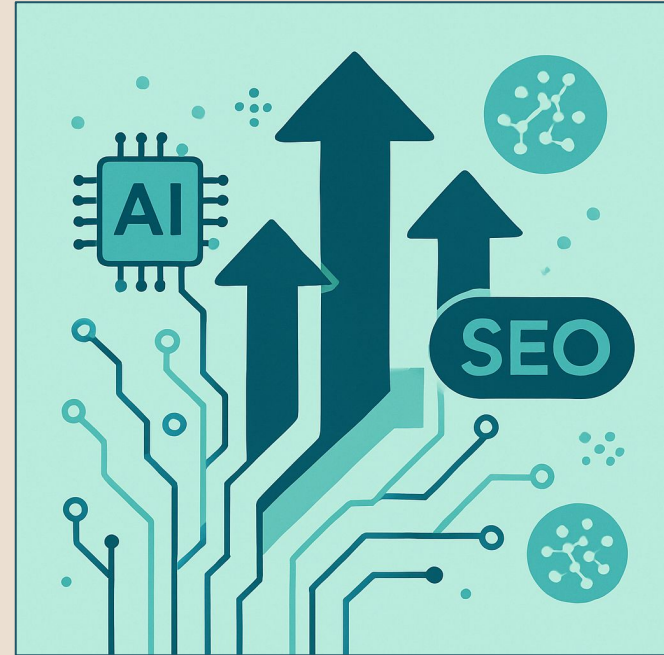
Looking to the Future

- ❑ As AIs become increasingly intelligent, how to appear will likely change and as such **it is important to keep horizon scanning**. AI platforms will also increase the personalisation and tailoring available to users.
- ❑ Agentic AI will become the new norm in the years to come, where **AIs act as agents on our behalf to complete purchase journeys, bookings and lead forms**.
- ❑ While Google has historically warned us against marketing to bots, the new environment basically requires that we consider bots as a primary consumer because the bots are the interpreters of information for the end user. **In other words, users may not see your website at all.**



Next Steps

- ❑ As we move into the new era of organic search, it is important that **we now optimise our sites for the methods of search our target audience use.**
- ❑ This includes **adapting existing SEO strategies.** This is evolution, not revolution.
- ❑ Our reporting also needs to be updated **to include AI search metrics, which I now have software to implement.**
- ❑ **How MP can help:** Strategy, consultation, execution & comprehensive reporting.



Contact MP

[LinkedIn](#)

E: michael@mp-seo.com

T: +447877385024

