

AI in Search: Redefining Success in a Changing Discovery Landscape

NOVUS



The arrival of generative AI in search is fundamentally changing how people find and interact with information online, impacting both paid and organic channels.

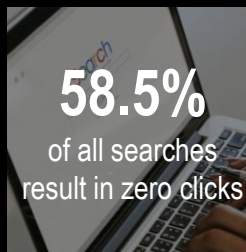
Platforms like Google's Search Generative Experience (SGE, also called the AI Overview), Microsoft's Copilot, ChatGPT, and Perplexity are no longer simply pointing users toward relevant sites. Instead, they're delivering full, synthesized answers directly on the search results page or within the LLM's native environment.

This shift compresses the traditional funnel and reduces opportunities for click-through—but visibility remains critical. It's just moving from ranked links to being a part of the "conversations" people are having.

"Zero-Click" search behavior

One of the most profound changes is the acceleration of "zero-click" search behavior – the scenario where users don't have to click any external links to answer their questions / queries.

This trend is in effect today, per *SparkToro's 2024 study* based on Datos/SEMRush clickstream data. It shows that in the U.S., 58.5% of searches result in zero clicks.



These numbers mark a sharp trend away from referral traffic. If single-digit drops in site traffic send your business into red alert, prepare yourself – *publishers whose businesses* rely on traffic are under existential threat and the behavior shifts seen with users encountering AI summaries mean that other categories will soon follow.

In fact, users who encounter an AI summary are *50% less likely to click* through to another site. It's a clear signal that brands must re-evaluate how visibility and impact are measured beyond traditional click-based metrics.

Changes to the Status Quo

Measurement is becoming murky

As AI mediates more of the search experience, referral data will erode—and much of the traffic that actually does make it through the zero-click experience will be attributed broadly as "direct" traffic in site analytics software when coming from sources like ChatGPT or Perplexity. Brands must adapt by modeling from a dwindling source of specific data, like branded keyword traffic, and testing those models against the general "direct" traffic.

Alongside this shift, success metrics overall must evolve. Traditional site KPIs such as sessions, click-through rates, and conversion rates no longer tell the full story. In the AI era, there is measurable value in simply being present—often without a click. Think of it as akin to branding impressions in display or connected TV — except with AI responses, the audience isn't passive. They're leaned in, actively seeking an answer, and the critical difference is that brand exposure is paired with the implicit trust of AI's response. That makes the exposure itself a signal of intent.

Visits lose value as answers replace links

Not every visitor to your site demonstrates purchase intent today. Many users are simply checking account details, retrieving quick info, or browsing without buying.

The strategic focus needs to shift toward identifying site flows that drive incremental business and then working backward to the referring search queries that feed those paths. For example, if the only traffic that drives business outcomes goes through a few particular product overview pages, through a pricing sheet, and ultimately delivers a conversion, then recalibrating around those particular visits, as opposed to site traffic overall, will be important.

The intelligence gained will help prioritize AI Optimization (AIO – think SEO for AI) on audience and content segments that truly move the needle.

Paid search will change—but won't disappear

Search ads will still play a role, but they're evolving. Perplexity, for instance, is experimenting with "sponsored follow-up questions"—ads integrated seamlessly into AI-generated answers, clearly labeled and generated by the platform itself.

Business Insider reports that 40% of users click on these suggested follow-up questions, though ad revenue remains under 0.1% of total income. Google knows what they're doing in the ad business, and are already featuring paid ads in a small percentage of their AI Overview responses – advertisers don't even have to make any changes to their ad campaigns. It's being tested automatically.

The question remains, however – how much will an ad that links outside of the SGE or AI conversation be attractive to an evolving consumer base? The answer to that likely revolves around maintaining relevancy to the topic at hand.

Shift Your Marketing Mindset

Recalibrate your strategy

This shift affects the broader marketing mix. Paid media that rely on site-based remarketing may see volume drops, while mid-funnel channels like online video (OLV) need to be viewed through the messaging lens of "what user questions do we anticipate next?" Strategy must be nimble to capture evolving consumer intent and react quickly to be relevant.

Diversification becomes essential

With traditional search traffic less reliable, brands should strengthen visibility across other discovery channels: social search, retail media, influencer partnerships, content syndication, and even affiliate content sites like Wirecutter, Nerd Wallet, or CNN Underscored, all of which are cited sources of Generative AI. AI search should be treated as one key component—not the only one—in a surround-sound marketing strategy.

41%

Of consumers have used TikTok for search, up to 64% for Gen Z

Optimizing for AI: AIO

AIO ushers in a shift from keyword-centric tactics toward building contextual authority. In AI-powered conversational environments, users pose multi-step questions, and responses are synthesized from multiple sources.

Brands that succeed will do four things:

- 1 Target popular FAQs.** Answering the top questions increases chances of being surfaced in AI summaries.
- 2 Use compelling visuals.** Google's SGE favors explanatory images for technical topics, driving both visibility and engagement.
- 3 Include rich multimedia.** Pages with video are often ranked more favorably in AI overview contexts.
- 4 Offer clear comparisons.** Structured comparisons like "X vs Y" are easy for AI to digest when answering queries such as "which is better?"

Steps to Stay Ahead

Immediate next steps:

- Audit purchase-intent site flows and the search queries fueling them
- Start tracking AI visibility and exposure metrics
- Start the conversation now within your organization to begin integrating AI-era KPIs into your reporting

Long-term focus:

- Develop authoritative, structured content with depth across text, visuals, and video
- Prepare creative strategies aligned with AI-informed insights
- Diversify traffic sources to reduce reliance on traditional search clicks

Brands that thrive in this evolving landscape will adapt swiftly, measure creatively, and understand that visibility isn't just clicks—it's the influence exerted at the moments that matter most.



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