

The Great Marketing Reshuffle

How AI is reshaping the consumer journey and what marketers can do about it.

Giacomo Iotti

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Zurich, 21.11.2025



Giacomo Iotti

- 2025: Digital Campaign New Products & AI Lead
- 2020-2024: Senior Performance Marketing Manager
- [LinkedIn posts](#) and [personal blog](#) about AI & Marketing



<https://www.linkedin.com/in/giacomoioitti/>

Agenda

- 1. The new consumer journey in the age of AI.**
- 2. The numbers behind the shift.**

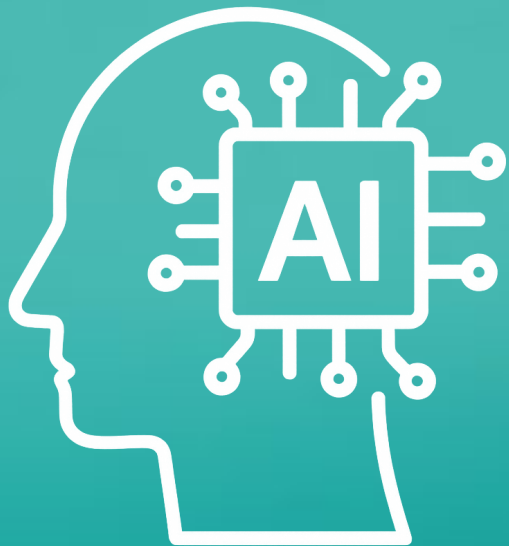
Interactive session

- 3. Are AI chatbots replacing Google?**

Interactive session

- 4. The opportunity for marketers.**

Final Q&A and interactive discussion



The new *consumer journey* in the age of AI

Take the purchase of a
wireless headset as an
example.



Consumer journey: *Pre-AI*

1 The Trigger

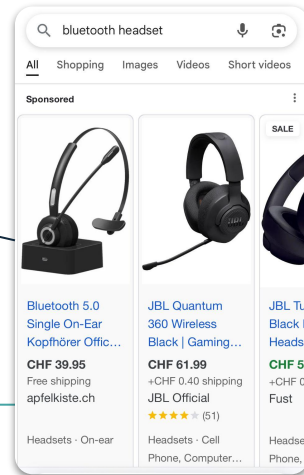
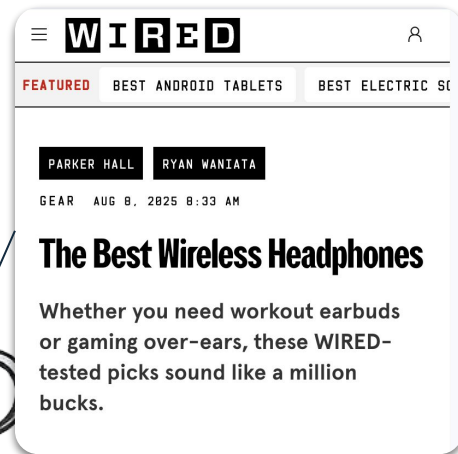
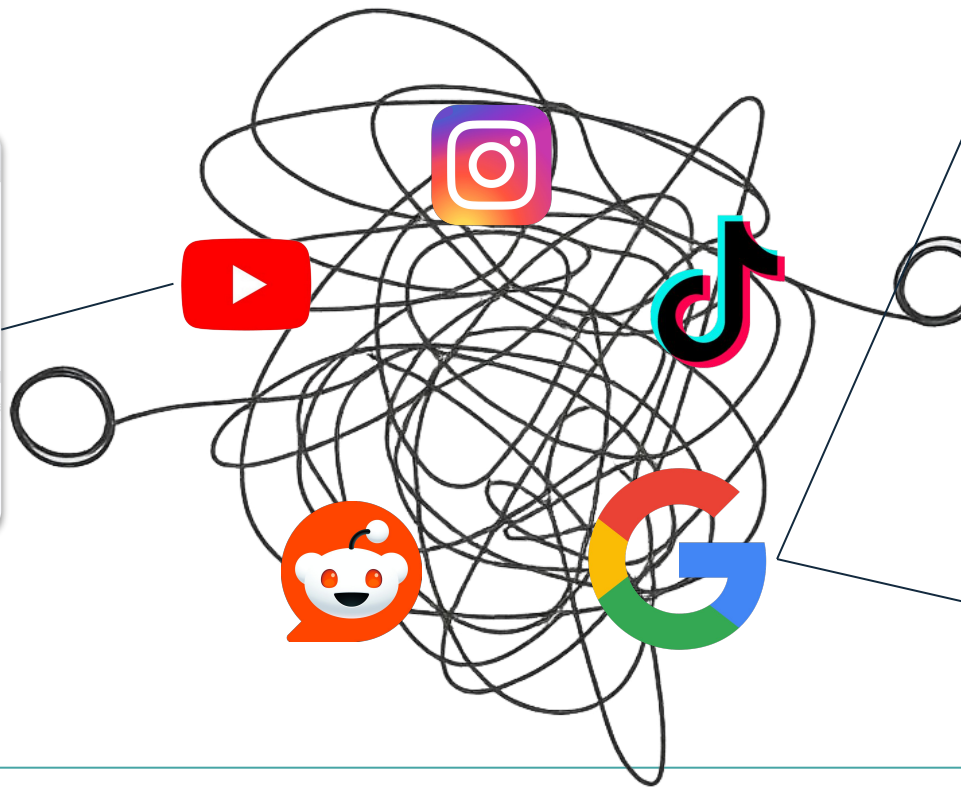
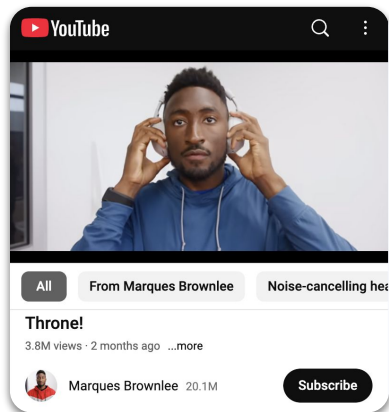
A brand's marketing positioning influences **when** and **why** purchase triggers activate.

The same wireless headset can be marketed as a *gym companion*, a *commuting essential*, or a *remote work tool*. Depending on a consumer's current "moment," a specific positioning will resonate more deeply, effectively kickstarting the purchase journey.



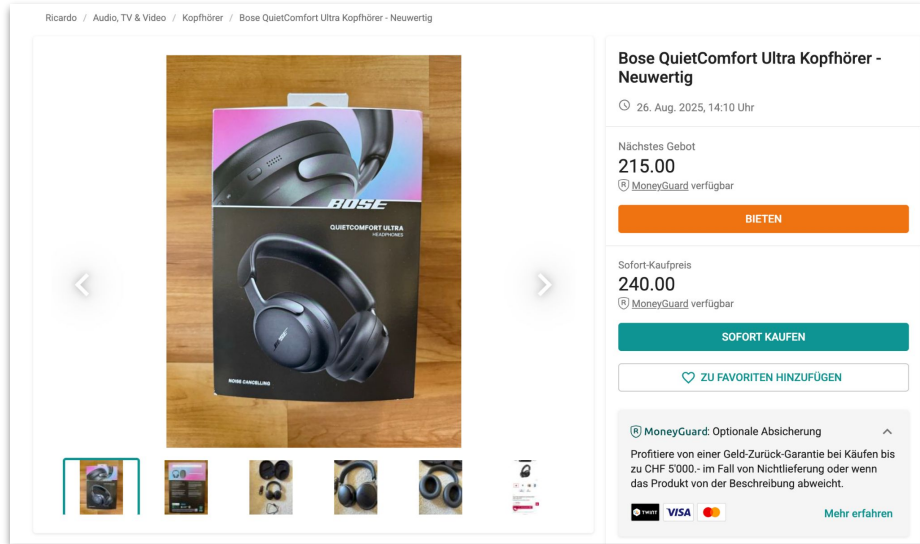
Consumer journey: *Pre-AI*

2 The Messy Middle



Consumer journey: *Pre-AI*

3 The Purchase

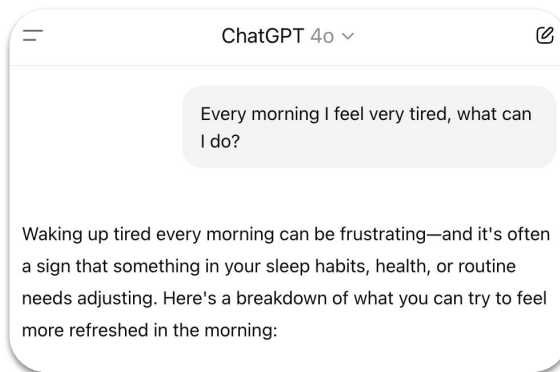


Consumer journey: *Post-AI*

1 The Trigger

A casual chat about feeling tired in the morning could suddenly lead to exploring the idea of buying a wireless headset.

ChatGPT suggests working from home more often to sleep longer. It also suggest purchasing a noise-canceling headset to improve the remote work experience.



Reevaluate Your Commute

Since you mentioned the commute is likely the problem, consider these changes:

1. Work From Home More Often (If Possible)

- Talk to your manager about a more flexible hybrid model.
- Even one or two extra WFH days can help you recharge.

2. Shift Your Hours

- Starting earlier or later could help avoid rush hour, making the commute less draining.

3. Change Your Commute Routine

- **Drive?** Try podcasts or calming music instead of stressful radio or news.
- **Public transport?** Use the time to nap lightly, read, or meditate with an app.

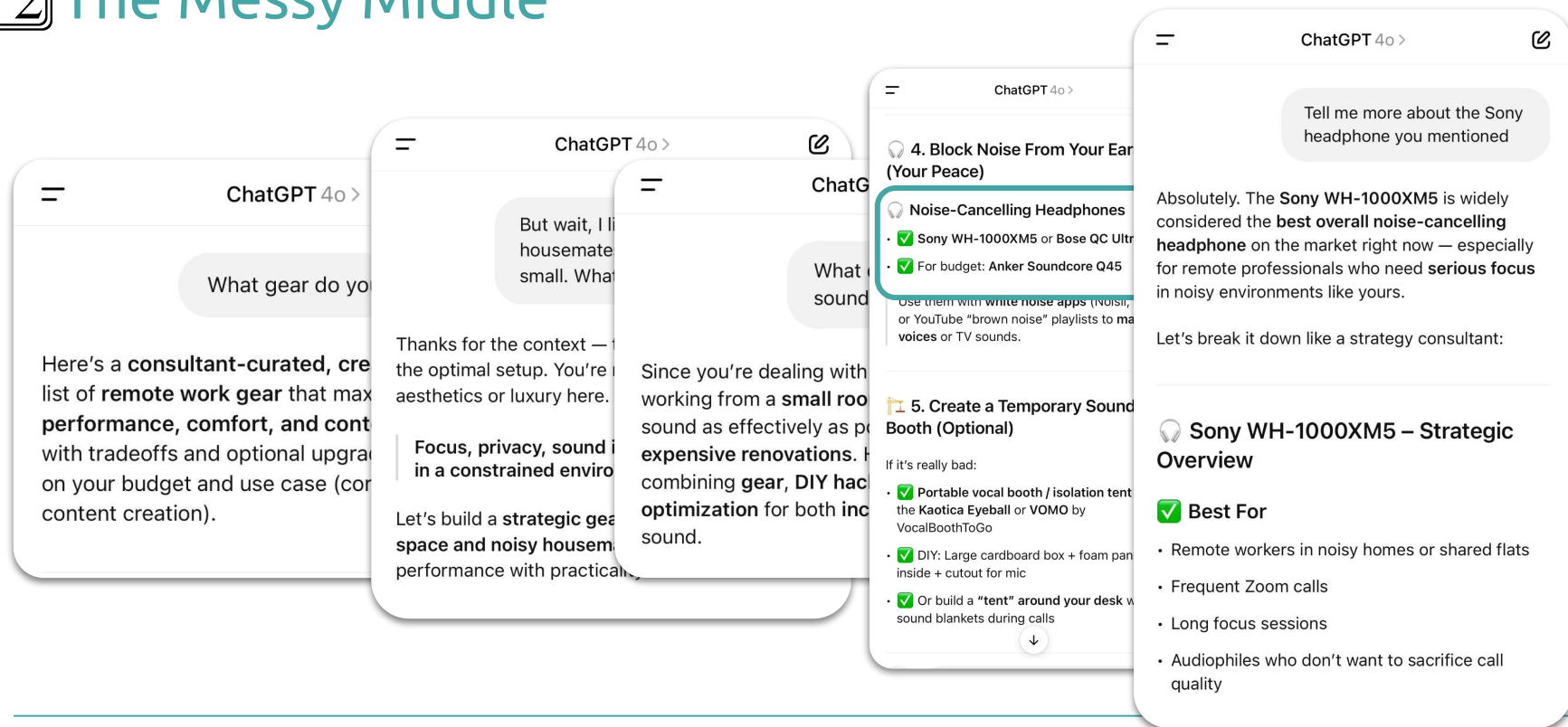
Use Commute Time Strategically

Instead of seeing your commute as lost time, try reframing it:

- As a **transition** into and out of work (mental buffer zone)
- As a **quiet moment** for personal development or mindfulness
- As a time to **listen to audiobooks or learn something new**

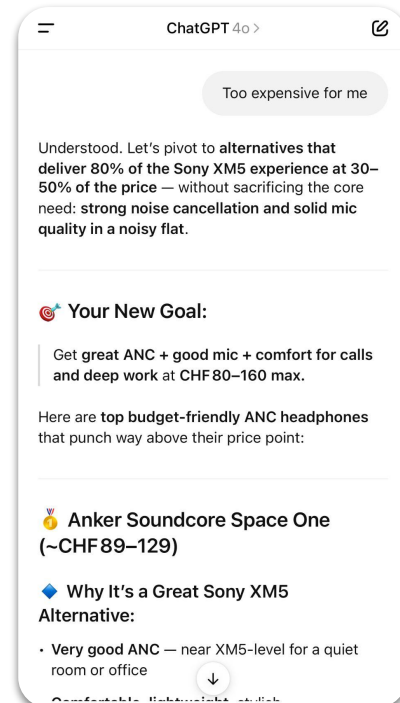
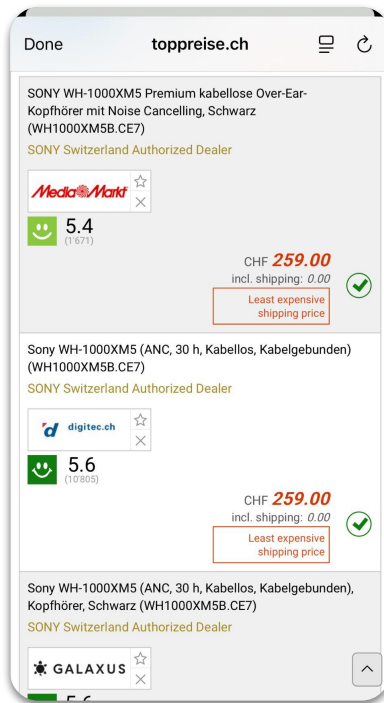
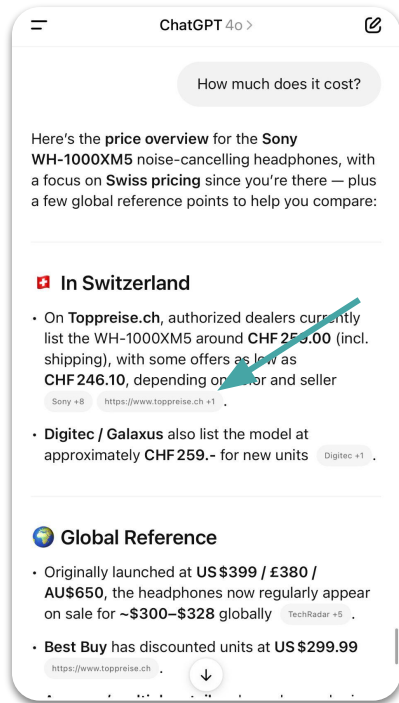
Consumer journey: *Post-AI*

2 The Messy Middle



Consumer journey: *Post-AI*

2 The Messy Middle

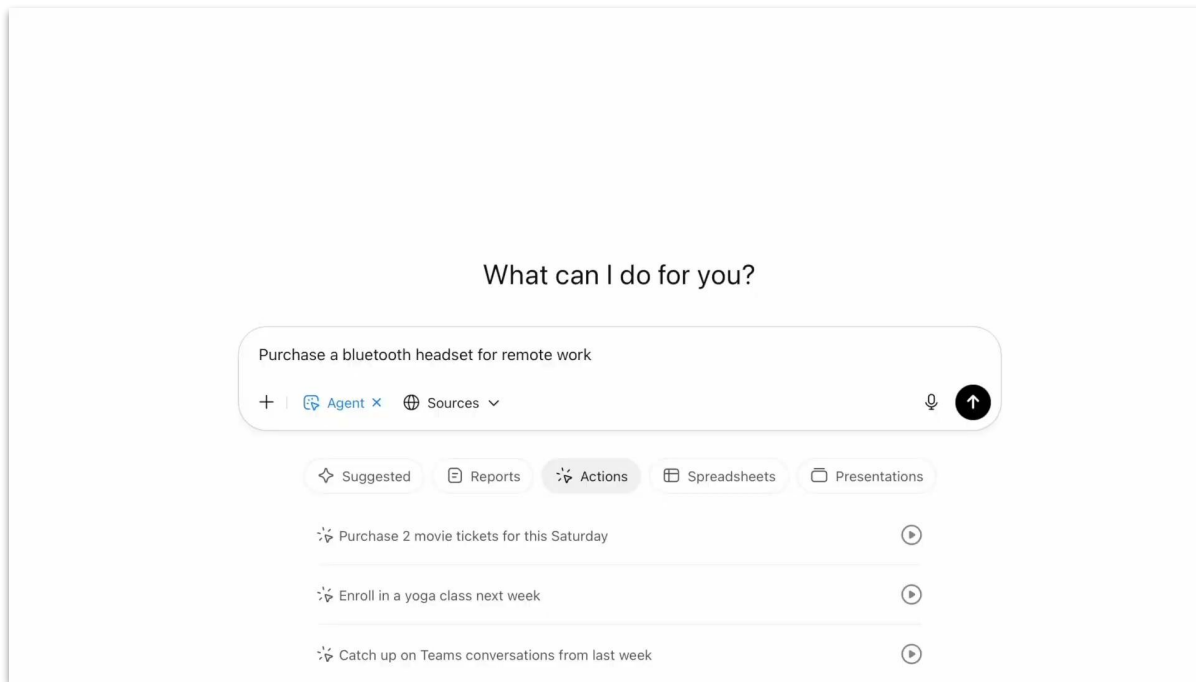


2 The Messy Middle



Consumer journey: *Post-AI*

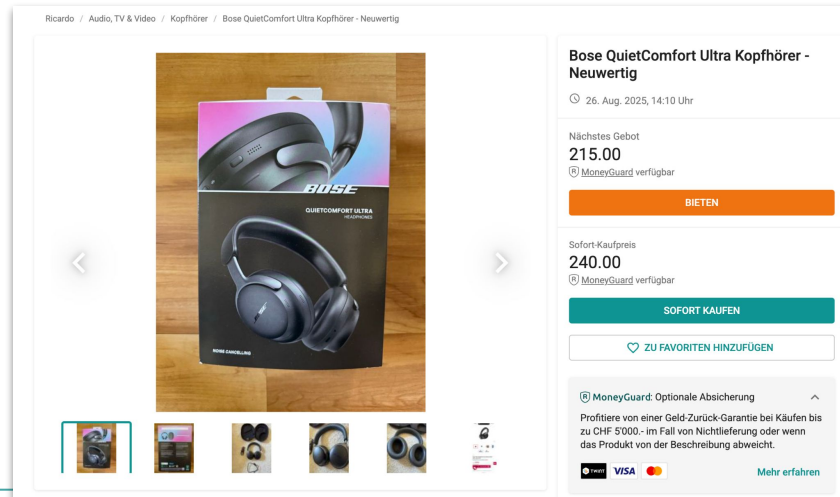
2 Even Messier Middle



3 The Purchase

Consumer journey: *Pre-AI*

Consumer journey: *Post-AI*





The numbers...

ChatGPT user-base: 10% of world population

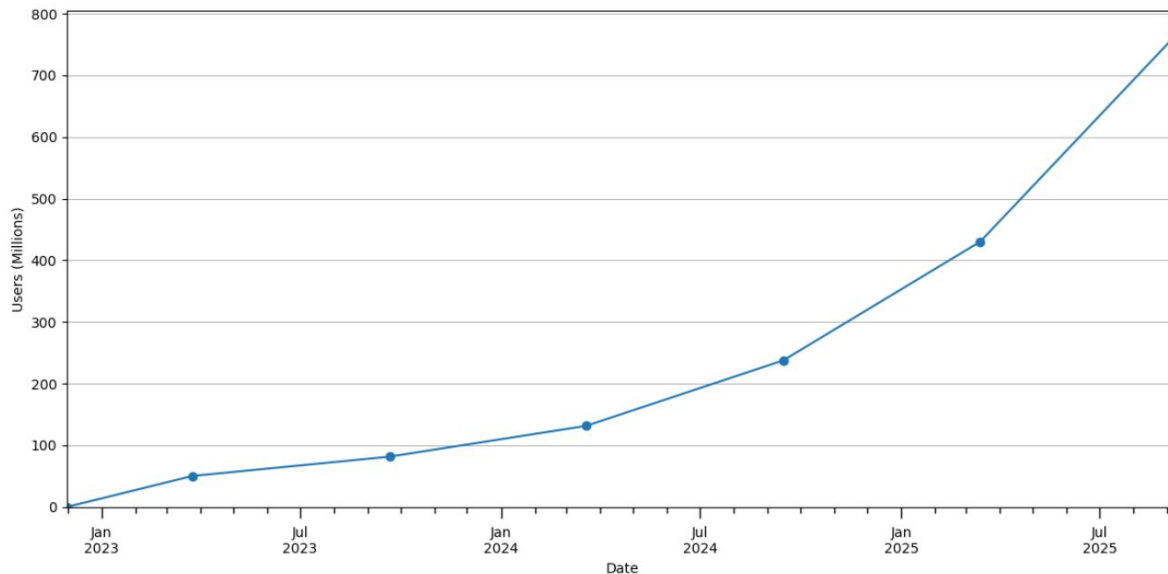
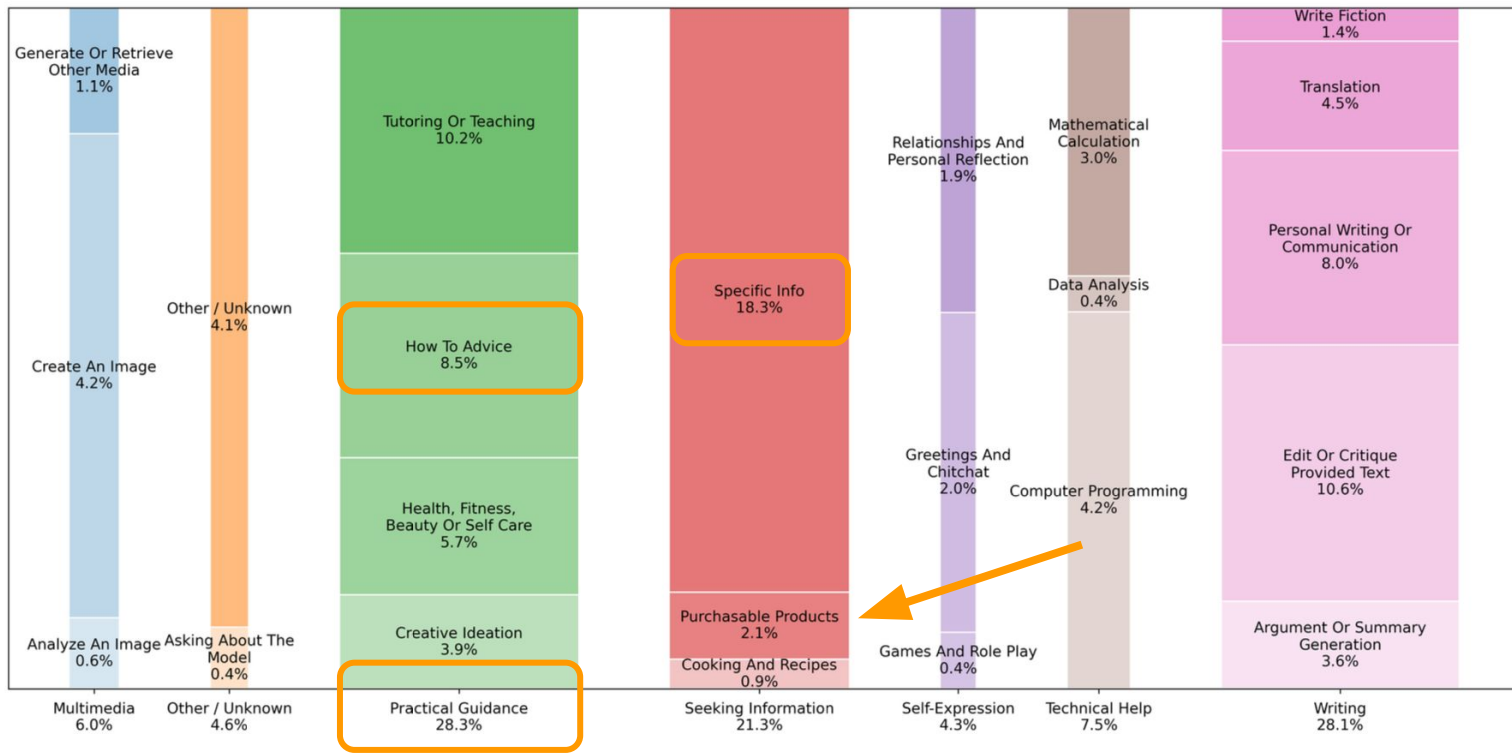


Figure 3: Weekly active ChatGPT users on consumer plans (Free, Plus, Pro), shown as point-in-time snapshots every six months, November 2022–September 2025.

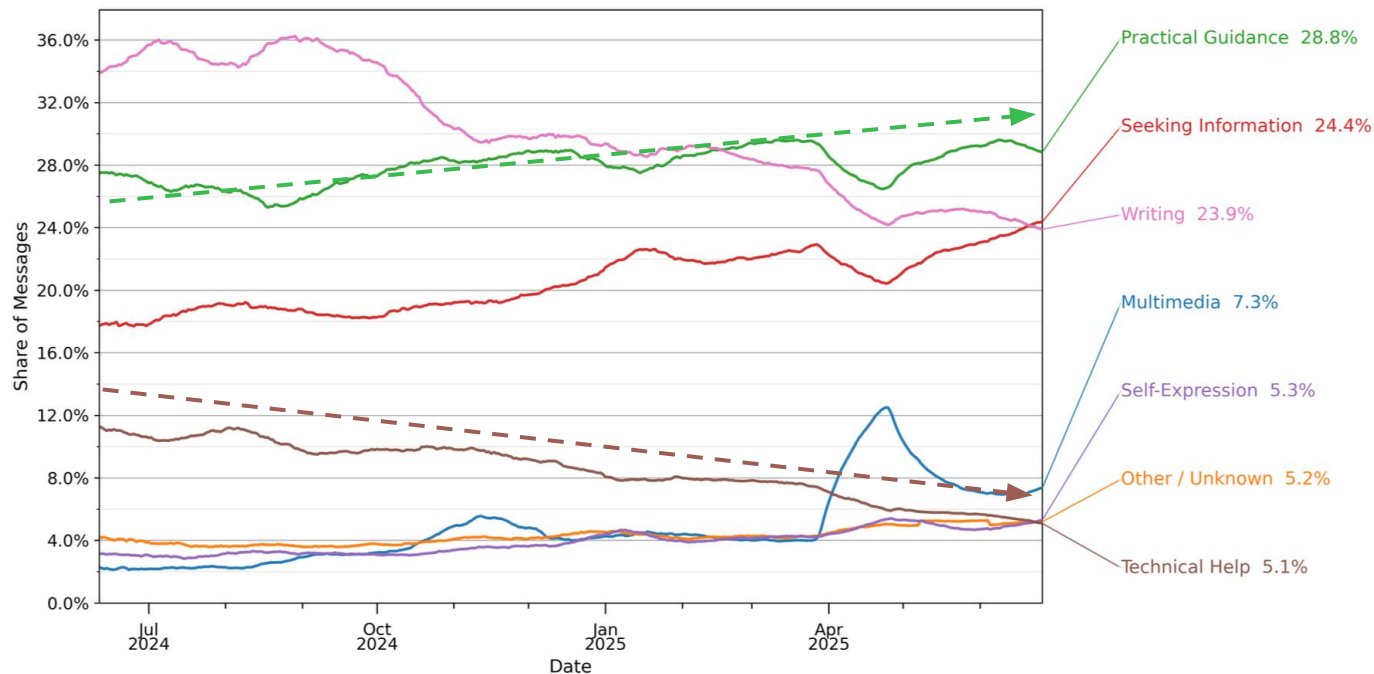
ChatGPT usage: 73% of messages for non-work

Month	Non-Work (M)	(%)	Work (M)	(%)	Total Messages (M)
Jun 2024	238	53%	213	47%	451
Jun 2025	1,911	73%	716	27%	2,627

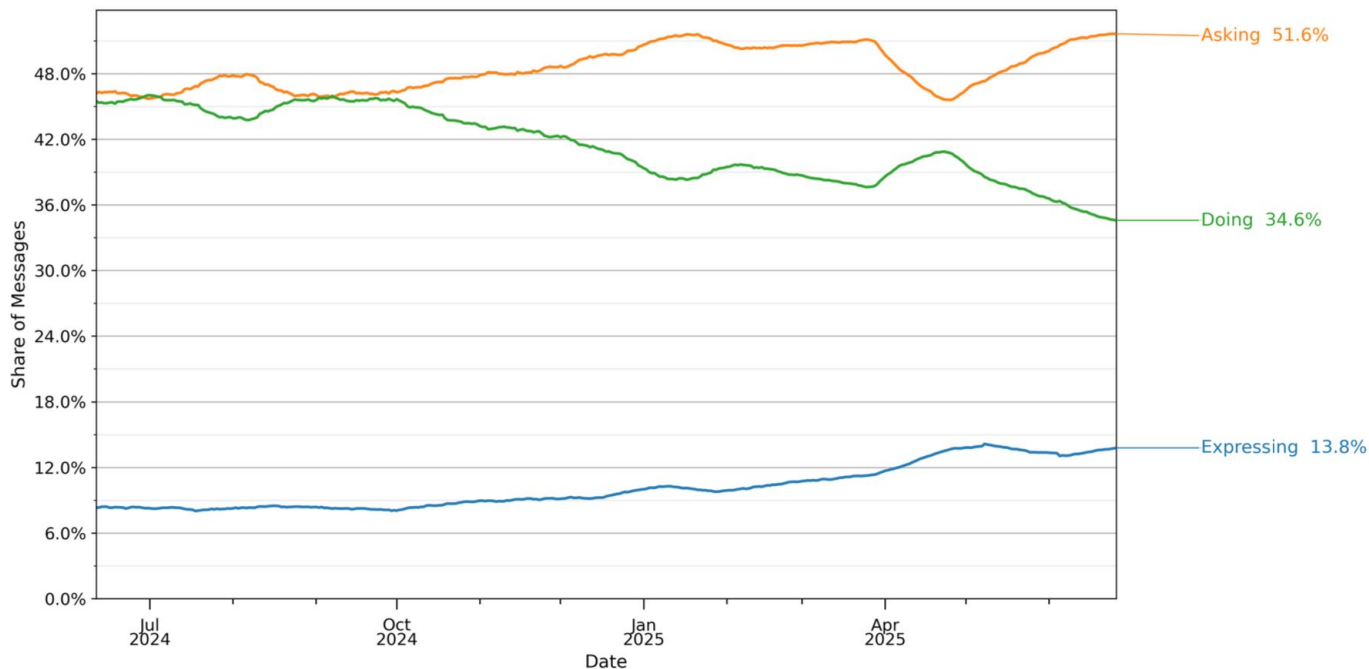
ChatGPT usage: personal assistance



ChatGPT usage: technical help is not popular

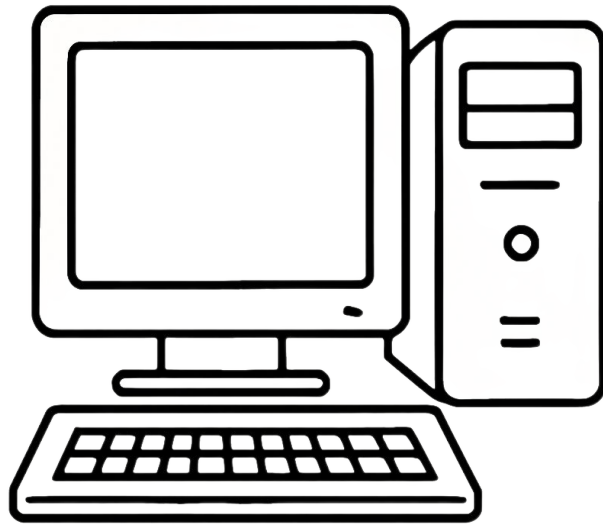


ChatGPT usage: Asking, Doing, Expressing



So...

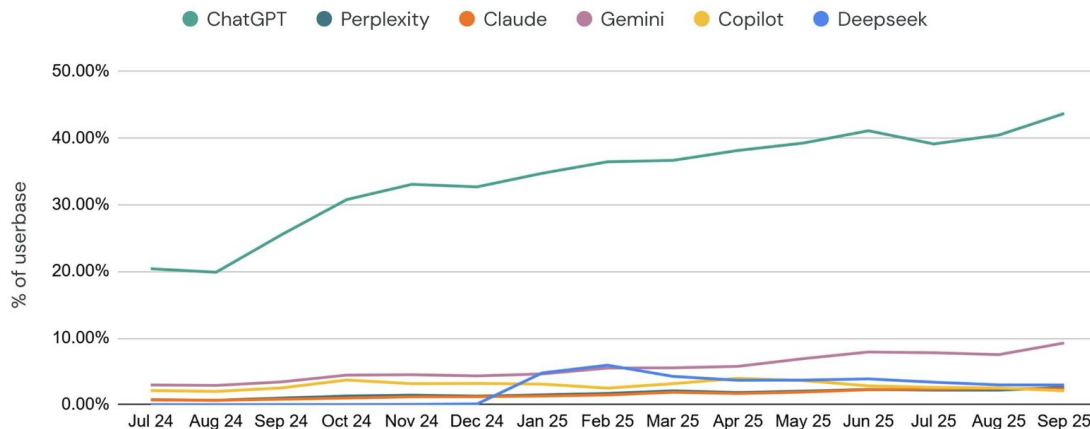
ChatGPT went from an experimental platform for tech savvy users, to a **search engine**, to a full digital **personal assistant**.



ChatGPT represents most users of AI bots

ChatGPT is the undisputed leader of the AI chatbot market. Therefore it represents the way *a typical user* interacts with AI.

Share of desktop users using AI in the EU & UK



Monthly % of userbase = $\frac{\text{Number of unique users visiting the domain's webpages (monthly) at least once}}{\text{Total number of unique panel users (monthly)}} \times 100\%$

SparkToro

Source: Datos

Datos
A Semrush Company


News!

Find an hotel in Milan city center, one night, next Saturday, two people, max CHF 150, minimum 8.0 rating.


Thought for 8s >

Booking.com

15 Nov - 16 Nov - 2 travelers



Hotel Margot
★★★★
Exceptional - 101 reviews
Room service Bar
Non-smoking rooms
From CHF 142 / 1 night
Includes taxes and fees
[View on Booking.com](#)



Hotel Midway
★★★★
Excellent - 3,511 reviews
Room service
24-hour front desk
From CHF 151 / 1 night
Includes taxes and fees
[View on Booking.com](#)

11:30

ChatGPT 5 >


Can you help me find a great housewarming gift for my friend? maybe handmade, ceramic dinnerware, in white and tan under \$100

Here's a curated selection of ceramic bowl sets in white and tan tones under \$100, with an emphasis on handmade, earthy, or minimalist styles. These would make great gifts or additions to your own tableware.

11:30

ChatGPT 5 >

Purchase complete

 Dinnerware Set by BlancPottery
Quantity: 1

Estimated delivery Monday, September 29

Sold by Etsy \$81.47

View details

New Tab

ChatGPT 5.1

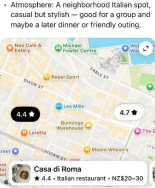
Ask ChatGPT or type a URL

- Agent mode — Ask ChatGPT to perform complex tasks in the browser
- Find the best restaurants near me — Find highly rated restaurants
- Compare phone plans and pick the best deal — Research current
- Find movies and shows I recently viewed — Scan my recent browsing and surface movies and shows I viewed or

Set as default browser

11:30

Join "Italian restaurants" chatgpt.com

 Casa di Roma
4.4 • Italian restaurant • NZ\$20-30

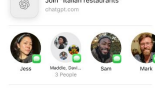
If you like, I can put together 5-7 more Italian or pasta-friendly restaurants across Wellington with gluten-free menus, and we can check pricing and group-friendly spaces. Would that be helpful?

Ask ChatGPT

Tap the people icon of a new or existing chat

11:30

Join "Italian restaurants" chatgpt.com

 Join "Italian restaurants" chatgpt.com

Invite one or more people

11:30

Search

ChatGPT

Library

GPTs

Projects

Group chats

Italian restaurants

Plant suggestions

House party ideas

Your chats

Backpacking weekend trips

Astrology signs compatibility

Animal volunteer opportunities

Stephen

Find group chats in the sidebar

11:30

Search

ChatGPT

Library

GPTs

Projects

Group chats

Italian restaurants

Plant suggestions

House party ideas

Your chats

Backpacking weekend trips

Astrology signs compatibility

Animal volunteer opportunities

Stephen

Begin your group chat

Interactive session:

- Pair with the person next to you.
- Take out your phone or laptop.
- Open ChatGPT or your favourite AI chatbot.
- Ask questions about your partner's business.
 - ◆ Start by asking about the product or service.
 - “What is the best website for {product/service} in {country}?”
 - “What is the best website for {product/service} in {city}?”
 - ◆ Then ask about their business specifically.
 - “Is {business} good for this {product/service}?”
 - “What do you think of {business}?”
 - ◆ Ask to navigate to their website and complete an action. Ideally with the GPT Agent.
 - Navigate to {website} and {action}?”

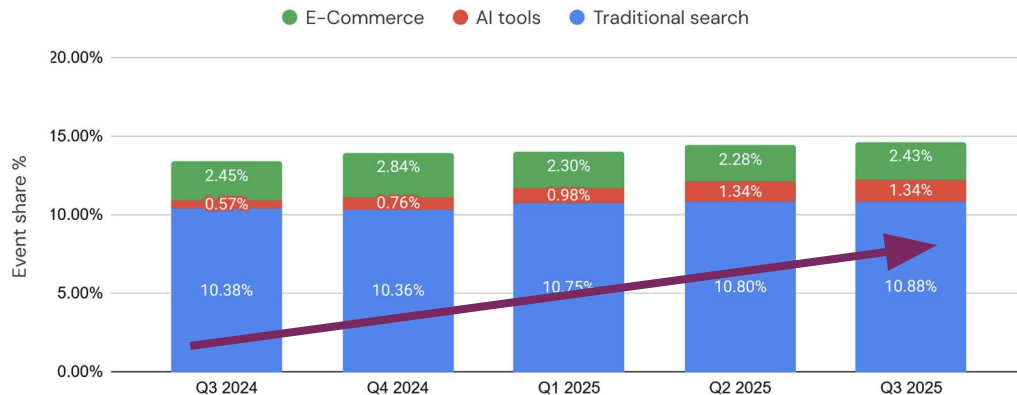
Are AI chatbots replacing Google?



Short answer: no

Share of usage of traditional search engines increased in the past year, although at a slower pace than AI tools (chatbots).

Search, AI, and E-Commerce platform visits in the EU & UK



Quarterly Events Share (%) = Quarterly visits to domain's webpages / Total quarterly webpage visits across entire panel * 100%



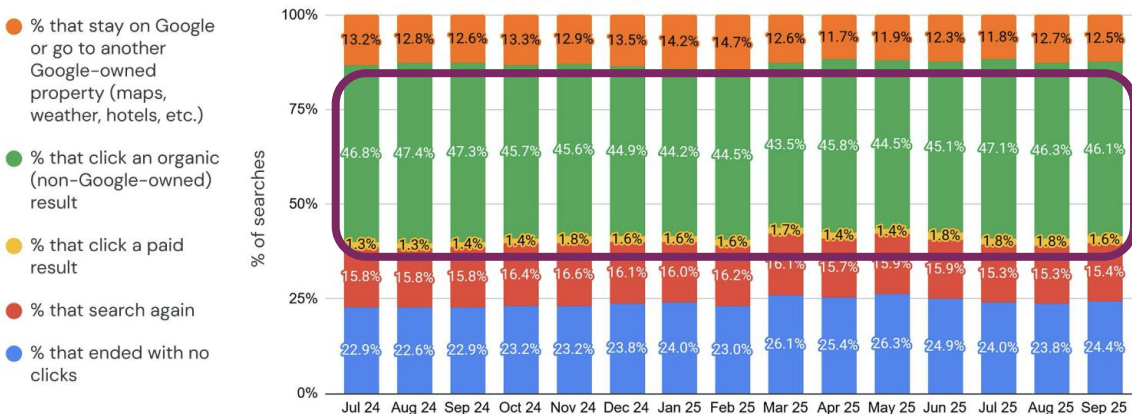
Source: Datos



Long answer: no, but user behaviour is changing

As of Sept '25, just 47.7% of Google clicks left google.com, down from 48.7% in Sep '24.

Distribution of Google EU & UK desktop search clicks over time



SparkToro

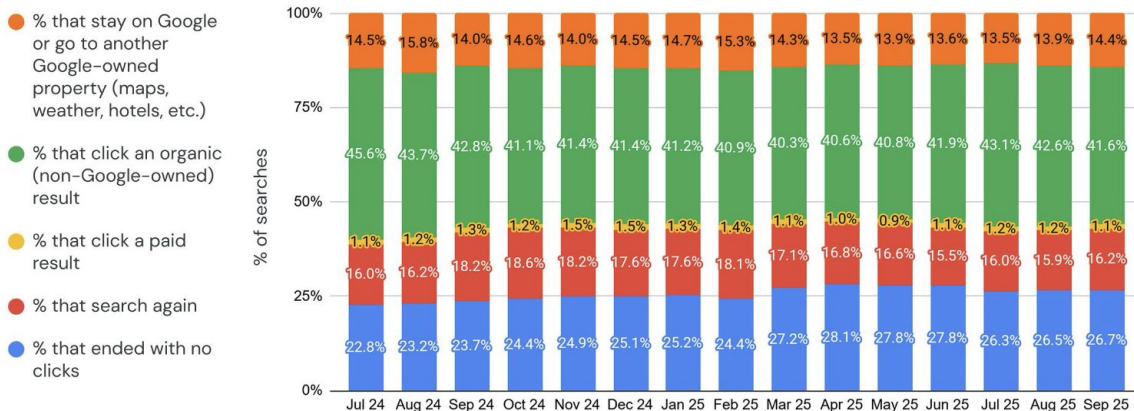
Source: Datos

Datos
A Semrush Company

Long answer: no, but user behaviour is changing

In the US, Google is sending even fewer clicks away. In Sep '25, only 42.7% of clicks left google.com.

Distribution of Google US desktop search clicks over time



SparkToro

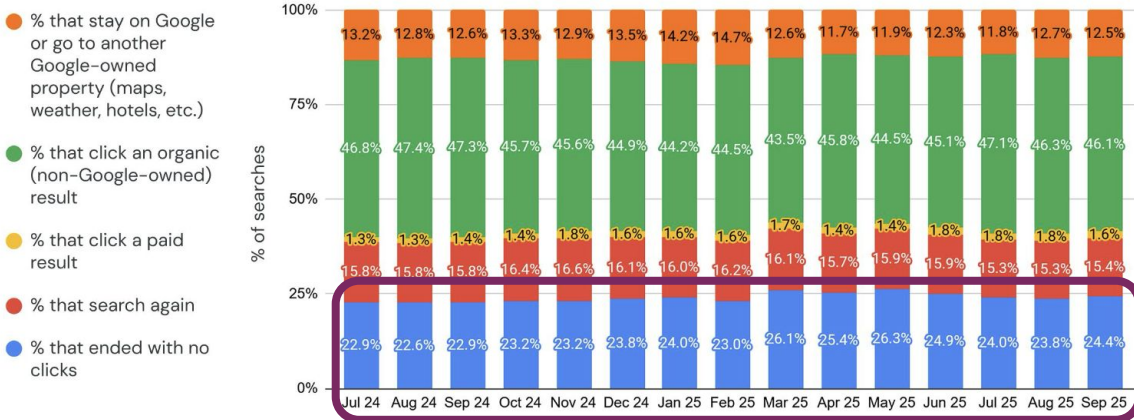
Source: Datos

Datos
A Semrush Company

The rise of “zero clicks”

Google searches that ended with **no clicks at all**, are on the rise. From 22.9% in Sep '24 to 24.4% in Sep '25.

Distribution of Google EU & UK desktop search clicks over time



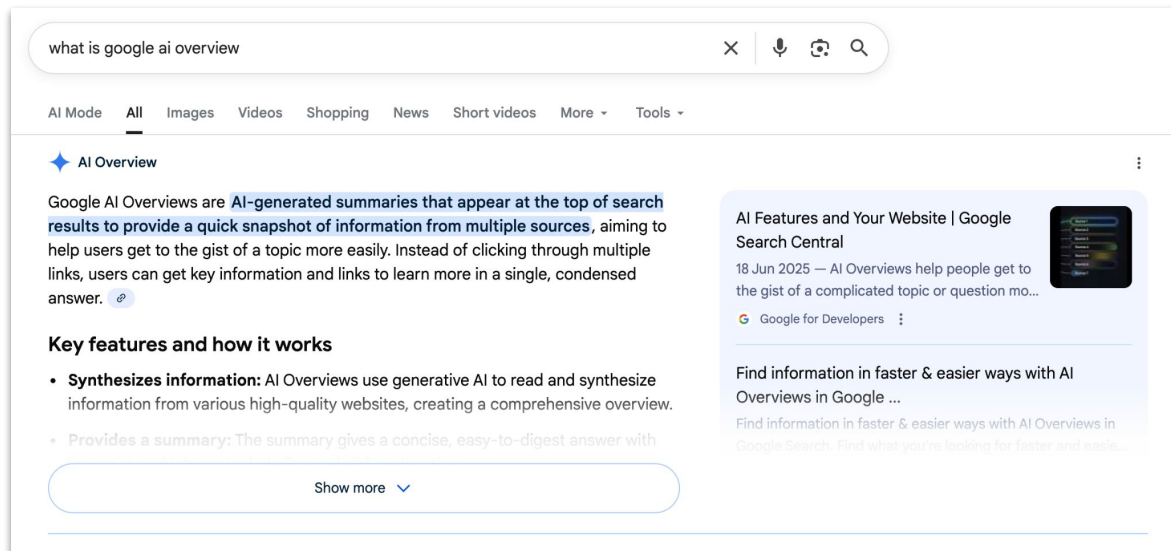
SparkToro

Source: Datas

Datos
A Semrush Company

The rise of “zero clicks”: Google AI Overviews

Google now embeds a chatbot on its homepage. Users might read the answers without clicking on any results.



The rise of “zero clicks”: Google AI Overviews

Google CTRs (both organic and paid) dropped significantly compared to last year.

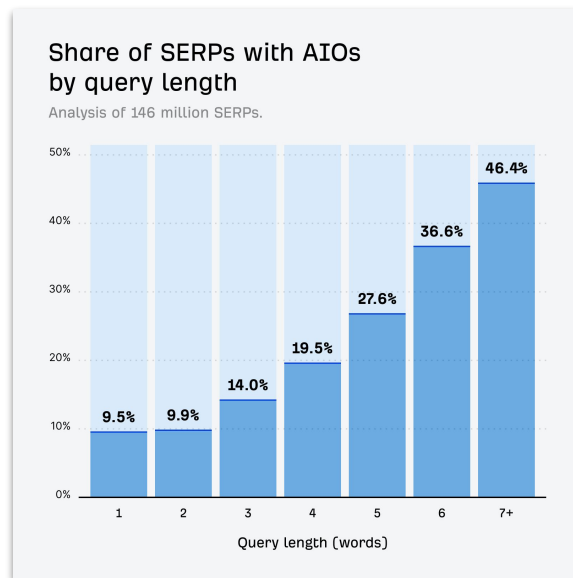
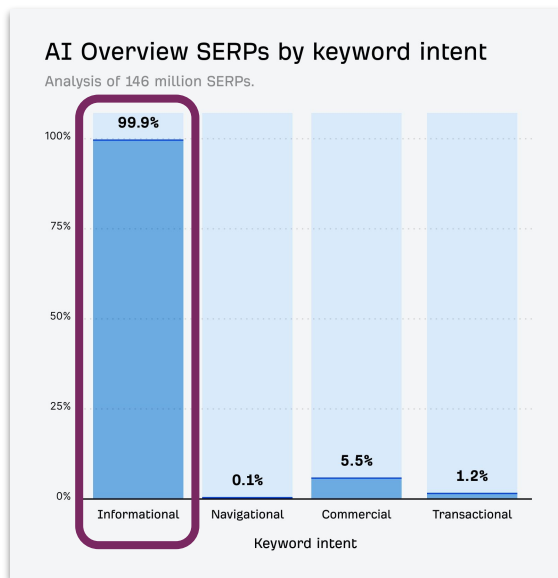
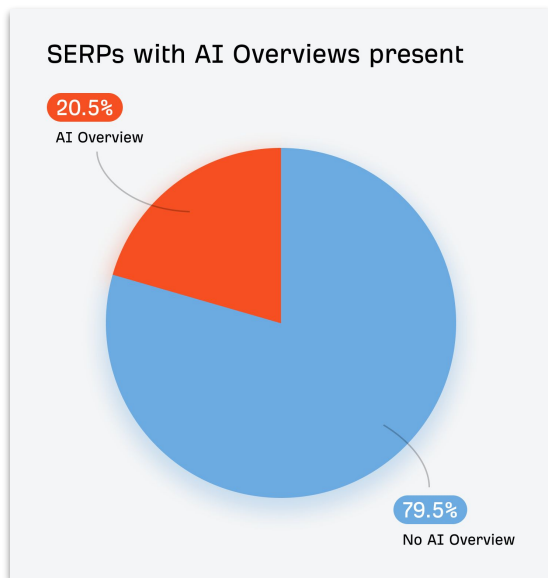
When AIO is shown, CTR almost halves, for organic and paid results.

Paid & Organic CTR Trends — 12 Months (Oct'24-Sep'25)

DATE (MONTH YEAR)	ORGANIC CTR AIO NOT SHOWN	ORGANIC CTR AIO SHOWN	PAID CTR AIO NOT SHOWN	PAID CTR AIO SHOWN
SEP 2025	1.62%	0.61%	13.04%	6.34%
AUG 2025	1.43%	0.58%	14.52%	5.58%
JUL 2025	1.33%	0.57%	14.1%	3.26%
JUN 2025	1.72%	0.61%	14.99%	10.35%
MAY 2025	2.08%	0.76%	14.42%	11.5%
APR 2025	2.77%	0.86%	15.82%	13.03%
MAR 2025	3.12%	0.82%	15.53%	11.12%
FEB 2025	3.14%	0.73%	15.48%	10.51%
JAN 2025	2.53%	0.72%	15.83%	10.36%
DEC 2024	2.37%	0.82%	12.77%	11.8%
NOV 2024	2.19%	1.15%	13.44%	13.44%
OCT 2024	2.8%	1.19%	16.6%	14.92%

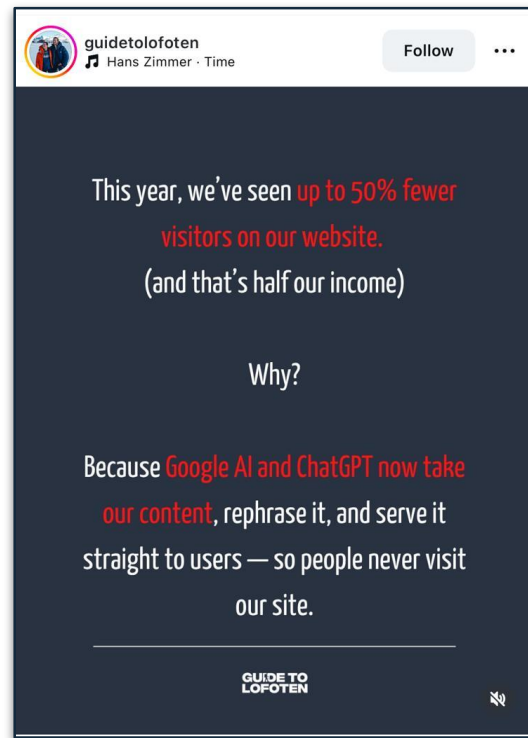
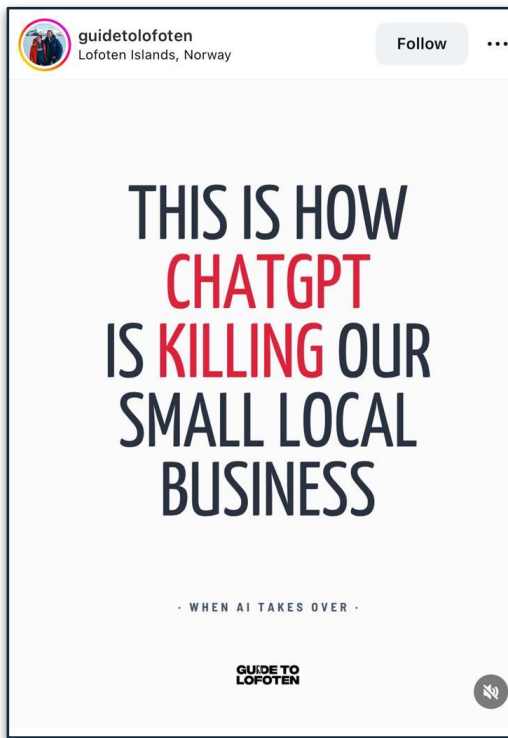
The rise of “zero clicks”: Google AI Overviews

Google AI Overviews is shown on 1 in 5 searches. Especially for long queries and almost exclusively for informational queries.



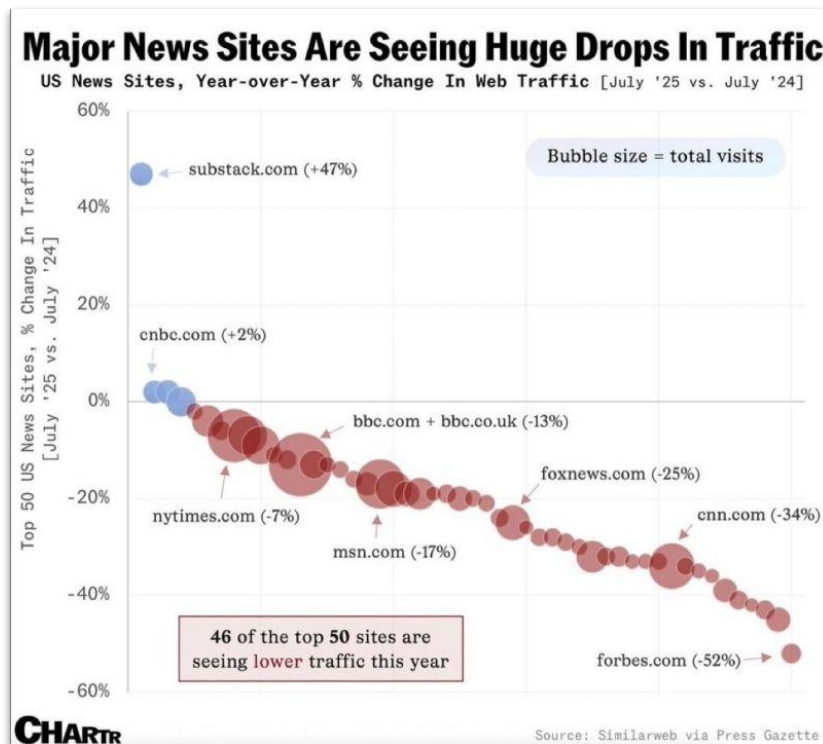
Zero clicks: traffic drop for informational sites

This Norwegian travel blog claims to have lost 50% of its traffic to AI chatbots.



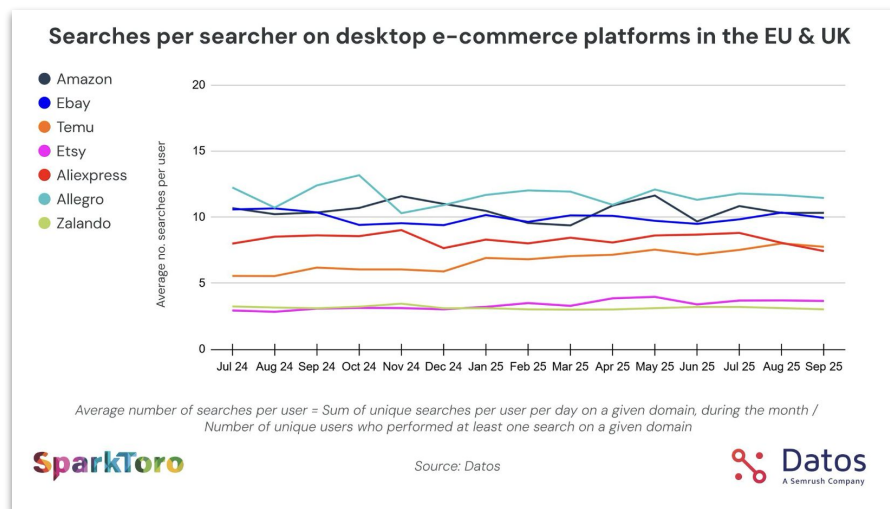
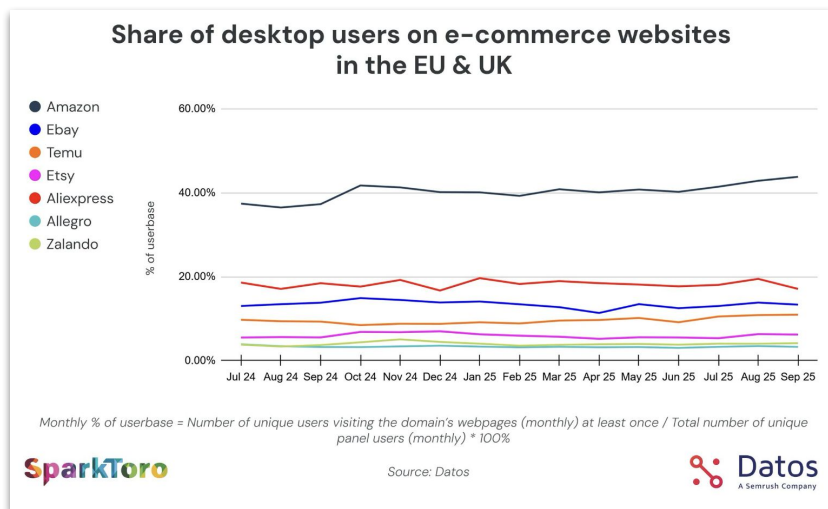
Zero clicks: traffic drop for informational sites

All major US news publishers are losing traffic.



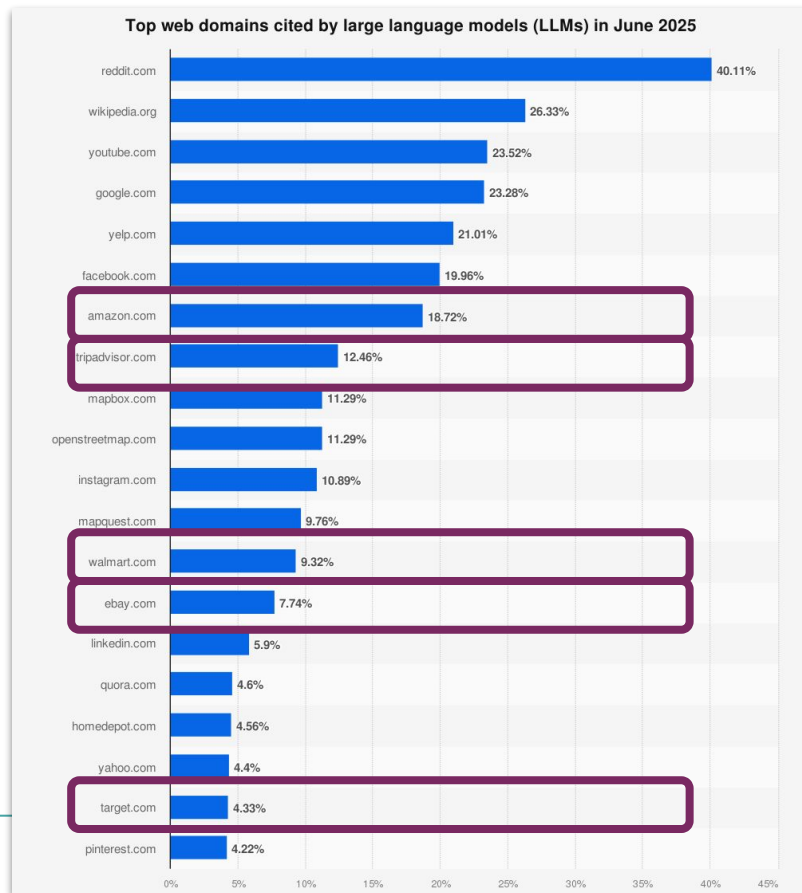
Zero clicks: marketplaces are resilient

Large eCommerce websites are not losing usage share. Also, they're not losing engagement on their platform (searches per user).



Top cited domains: AI favours large platforms

Among the 20 most cited domains by LLMs, 6 are eCommerce or travel platforms, like Amazon, TripAdvisor, Walmart and eBay.



Classifieds: the safest corner of the internet



Marc Walder • 1st
CEO and Managing Partner Ringier AG | Founder digitalswitzerland
1mo •

Generative AI is quietly rewriting how people search, compare and decide: from homes and cars to jobs.

According to [Morgan Stanley](#)'s report "Classifieds in the Age of Generative AI" (Oct 3, 2025), classifieds remain the safest corner of the European internet: strong network effects, loyal users, recurring revenue. But "safe" doesn't mean static.

As AI assistants like ChatGPT start directing up to 17% of traffic to property portals, the discovery journey is shifting from websites to conversations.

For marketplace leaders, the challenge is clear: protect proprietary data and direct relationships, yet stay open enough to collaborate where the user journey begins - increasingly inside AI ecosystems.

The winners will blend both worlds: the trust and depth of their own platforms with the intelligence and reach of generative AI.

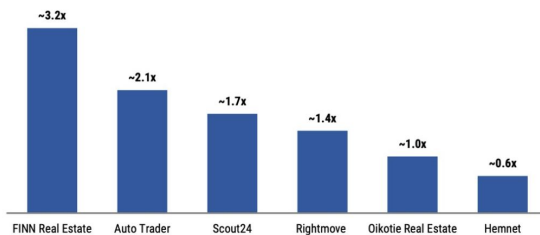
[#Ai](#) [#Classifieds](#) [#jobs](#) [#realestate](#) [#cars](#)

Exhibit 1: AI scorecard: Assessing AI Risks and Resilience in Classifieds

Company	Defensiveness of vertical mix	Listing advantage versus #2 player	Dealer/agent integration	AI tool adoption	Proprietary data	Total
Scout24	5	4	5	5	5	24
AutoTrader	4	5	5	5	5	24
rightmove	5	4	4	4	4	21
Vend	3	5	3	3	4	18
Hemnet	5	3	3	3	4	18

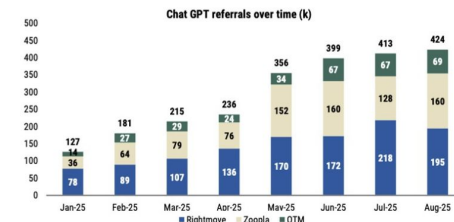
Source: Morgan Stanley Research estimates. Scale: 0 being the least attractive with 5 being the most attractive.

Exhibit 2: Listing advantage versus #2 competitor



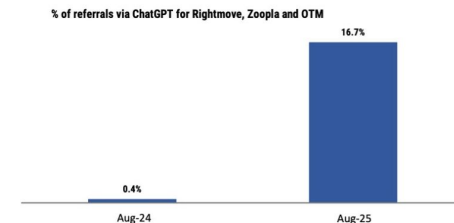
Source: Morgan Stanley Research, Company information

Exhibit 3: Chat GPT referrals have increased 234% YoY...



Source: Similarweb, Morgan Stanley Research

Exhibit 4: ...now accounting for ~16% of total referrals in August 2025



Source: Similarweb, Morgan Stanley Research

The opportunity



Interactive session:

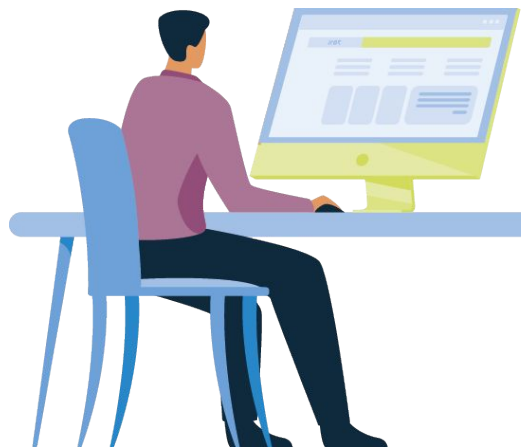
Can you think of any specific marketing opportunity in this new AI scenario?

Clicks  **business**

Two opportunities



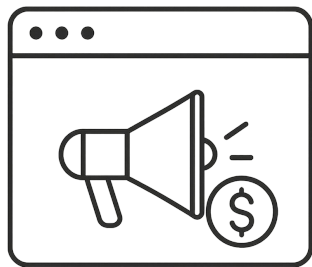
Strategy



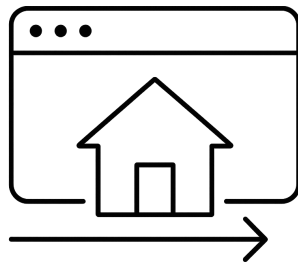
Technology

Strategy

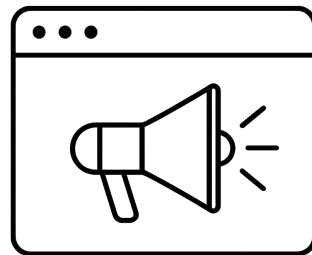
Consider AI chatbots as a **new channel**, or **new “audience”**.
Use this popular media framework to leverage the new channel.



Paid



Owned



Earned

Strategy: Paid Media

Wide reach across channels

Spread your message across **many channels**. Online and offline.

Soon AI chatbots will sell ads.
Be there too.

Creativity

Focus on ***creativity*** and ***new ideas***.

With AI, producing advertising assets is easy and cheap. Being creative is the best way to stand out.

Bottom-Line KPIs

Focus on bottom-line KPIs like ***revenue or profit growth***.

Leave AI to handle the rest.

Strategy: Owned & Earned Media

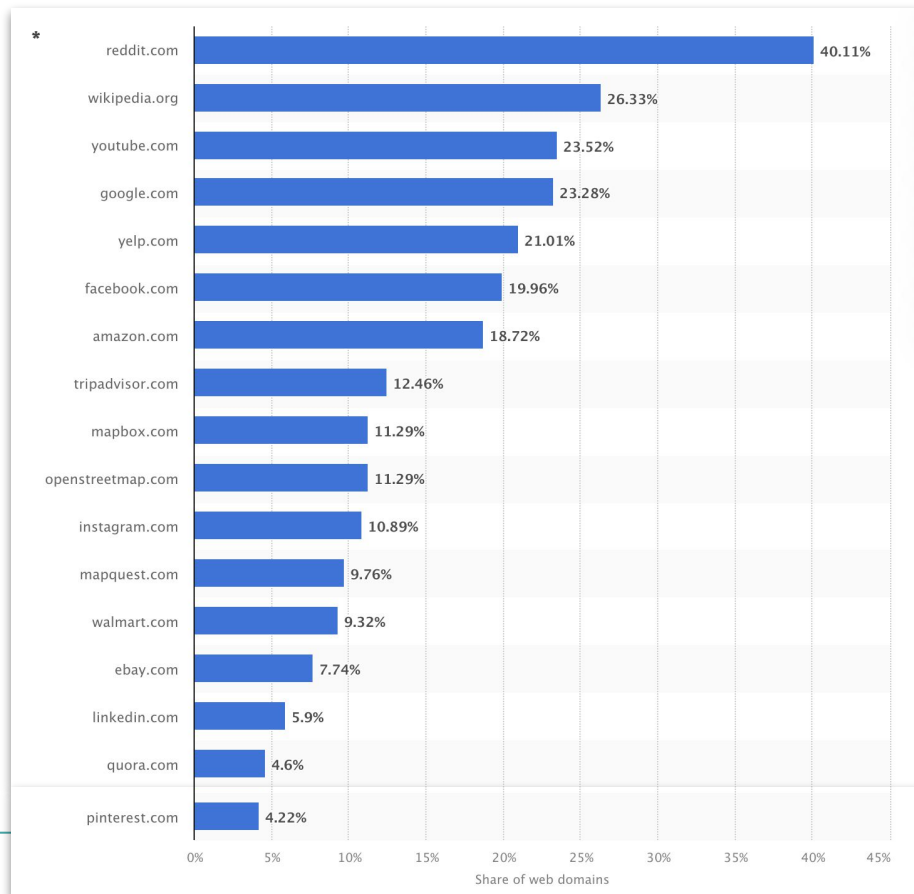
Spread your brand's “*distinctive assets*” and message across many channels.

Foster **online PR**:

What truly matters is people talking about you, *unsolicited*. AI listens and takes note.

Don't spam though! :)

**Top domains cited by LLMs, Statista (June 2025)*



Technology

AI-driven advertising is here.
Don't resist it, embrace it!

Leverage AI to reach users in
every stage of the consumer
journey.

Performance Max
Demand Gen
AI Max



Advantage+



Smart+



Tik Tok

Performance+



Technology:

The **agentic web** is here. Optimise your website for it.

Backend

Technical **SEO best practices**, with a twist:

- Consider allowing AI agents to access your website.
- Implement schema markup for all pages.
- Implement llms.txt (≠ robots.txt).
- Consider API entry points for popular agents.

Front End

Follow **accessibility best practices**:

- accessibility for humans = accessibility for AI agents.
- Full keyboard support
- & much more

Follow **modern UX best practices**:

- Typing in filters
- Pagination (no infinite scroll)
- Non-blocking cookie banner and modals
- & much more

Conclusions:

AI is reshaping the consumer journey.

- While the purchase moment stays on-site, the trigger and messy middle are moving inside AI conversations.

The new AI-driven consumer journey generates fewer clicks and site visits.

- “Informational” businesses are the most vulnerable. They’re already seeing decline in traffic.
- However, transactional sites, aggregators and marketplaces are resilient and possibly thriving.

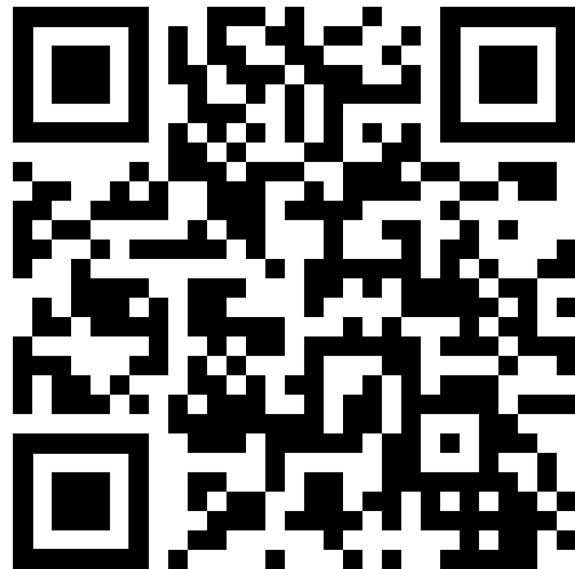
Leverage new opportunities.

- Consider AI chatbots as your new “audience”.
- Leverage the right mix of paid, owned and earned media across many channels, to reach users in all steps of the consumer journey, whether on or offline, inside or outside of AI chatbots.
- Use AI to your advantage. AI-driven media campaigns and website optimisation.
- First-mover advantage for brands that adapt their strategy first.

Thank You!

Giacomo Iotti

Digital Campaign New Products & AI Lead @ SMG



<https://www.linkedin.com/in/giacomoioitti/>

Interactive session:

Can you share experience from your
industry/company?

Appendix & Sources

Appendix

Study by OpenAI

[How people are using ChatGPT,](#)
September 2025

ChatGPT has almost 800M weekly active users, equal to 10% of world's population, or 1/3 of Instagram users.

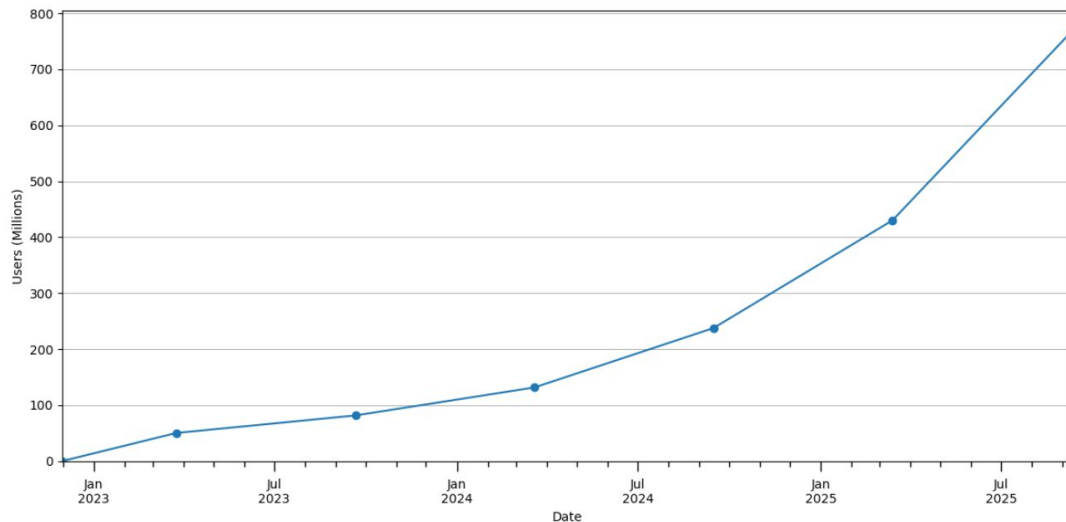


Figure 3: Weekly active ChatGPT users on consumer plans (Free, Plus, Pro), shown as point-in-time snapshots every six months, November 2022–September 2025.

Appendix

Study by OpenAI

[*How people are using ChatGPT,*](#)
September 2025

As of July 2025 **73% of ChatGPT consumer queries were unrelated to work;** while both work-related and non-work-related queries have been increasing, non-work queries have been increasing **faster**.

Month	Non-Work (M)	(%)	Work (M)	(%)	Total Messages (M)
Jun 2024	238	53%	213	47%	451
Jun 2025	1,911	73%	716	27%	2,627

Table 1: ChatGPT daily message counts (millions), broken down by likely work-related or non-work-related. Total daily counts are exact measurements of message volume from all consumer plans. Daily counts of work and non-work related messages are estimated by classifying a random sample of conversations from that day. Sampling is done to exclude users who opt-out of sharing their messages for model training, users who self-report their age as under 18, logged-out users, deleted conversations, and accounts which have been deactivated or banned (details available in Section 3). Reported values are 7-day averages (to smooth weekly fluctuation) ending on the 26th of June 2024 and 26th of June 2025.

Appendix

Study by OpenAI

[How people are using ChatGPT,](#)
September 2025

Nearly 80% of all ChatGPT usage falls into three broad categories, which we call Practical Guidance, Seeking Information, and Writing. **Practical Guidance is the most common use case** and includes activities like tutoring and teaching, how-to advice about a variety of topics, and creative ideation. Seeking Information includes searching for information about people, current events, products, and recipes, **and appears to be a very close substitute for web search.**

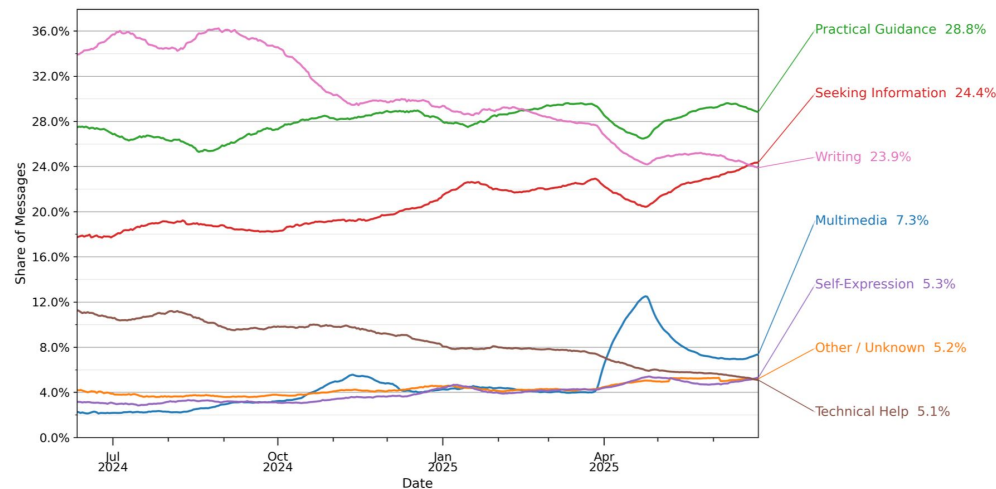


Figure 7: Share of consumer ChatGPT messages broken down by high level conversation topic, according to the mapping in Table 3. Values are averaged over a 28 day lagging window. Shares are calculated from a sample of approximately 1.1 million sampled conversations from May 15, 2024 through June 26, 2025. Observations are reweighted to reflect total message volumes on a given day. Sampling details available in Section 3.

Appendix

Study by OpenAI

[How people are using ChatGPT,](#)

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Nearly 80% of all ChatGPT usage falls into three broad categories, which we call Practical Guidance, Seeking Information, and Writing.

Practical Guidance is the most common use case and includes activities like tutoring and teaching, how-to advice about a variety of topics, and creative ideation. Seeking Information includes searching for information about people, current events, products, and recipes, ***and appears to be a very close substitute for web search.***

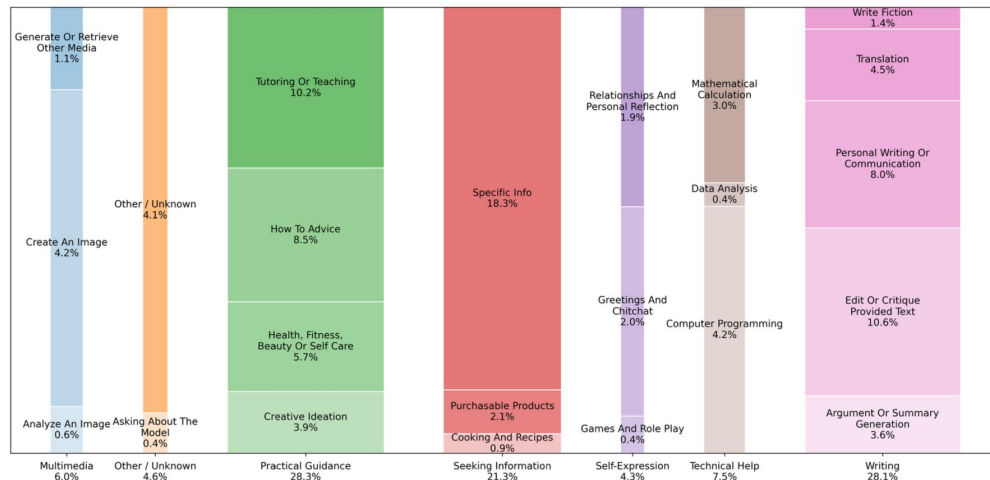


Figure 9: Breakdown of granular conversation topic shares within the coarse mapping defined in Table 3. The underlying classifier prompt is available in Appendix A. Each bin reports a percentage of the total population. Shares are calculated from a sample of approximately 1.1 million sampled conversations from May 15, 2024 through June 26, 2025. Observations are reweighted to reflect total message volumes on a given day. Sampling details available in Section 3.

Appendix

Study by OpenAI

How people are using ChatGPT,
September 2025

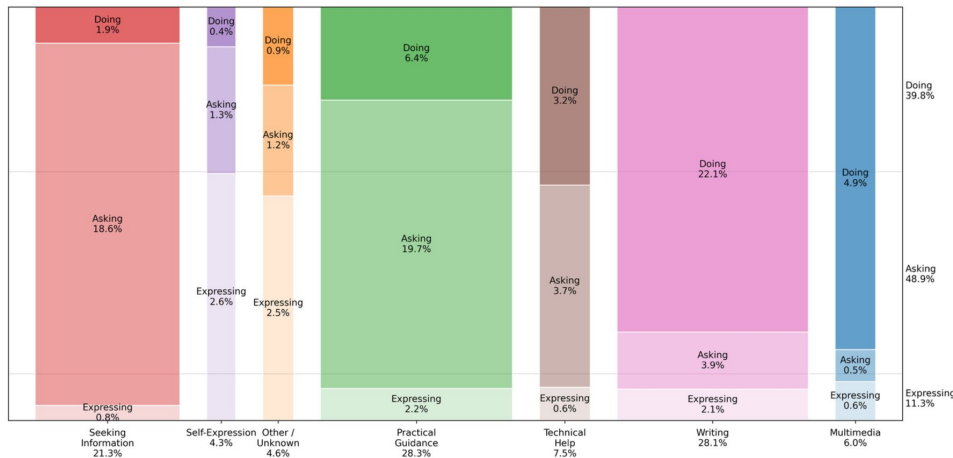


Figure 10: Breakdown of Conversation Topics by Asking/Doing/Expressing category, with topic columns sorted by relative share of "Doing" messages. Prompts for these automated classifiers are available in Appendix A. For a detailed breakdown of conversation topic contents, see Table 3. Each bin reports a percentage of the total population. Shares are calculated from a sample of approximately 1.1 million sampled conversations from May 15, 2024 through June 26, 2025. Observations are reweighted to reflect total message volumes on a given day. Sampling details available in Section 3.

Appendix

Study by OpenAI

[How people are using ChatGPT,](#)
September 2025

In July 2024, usage was evenly split between Asking and Doing, with just under 8% of messages classified as Expressing. **Asking and Expressing grew much faster than Doing** over the next year, and by late June 2025 the split was 51.6% Asking, 34.6% Doing, and 13.8% Expressing.

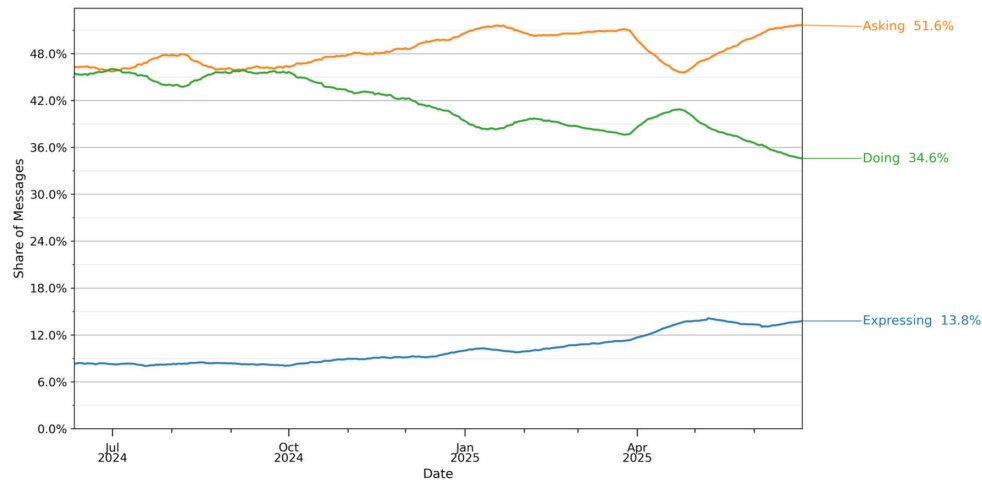


Figure 12: Shares of messages classified as Asking, Doing, or Expressing by an automated ternary classifier. Values are averaged over a 28 day lagging window. Shares are calculated from a sample of approximately 1.1 million sampled conversations from May 15, 2024 through June 26, 2025. Observations are reweighted to reflect total message volumes on a given day. Sampling details available in Section 3.

Appendix

Study by OpenAI

[How people are using ChatGPT,](#)
September 2025

Asking and Expressing are mostly non-work tasks, while Doing is split roughly 50/50.

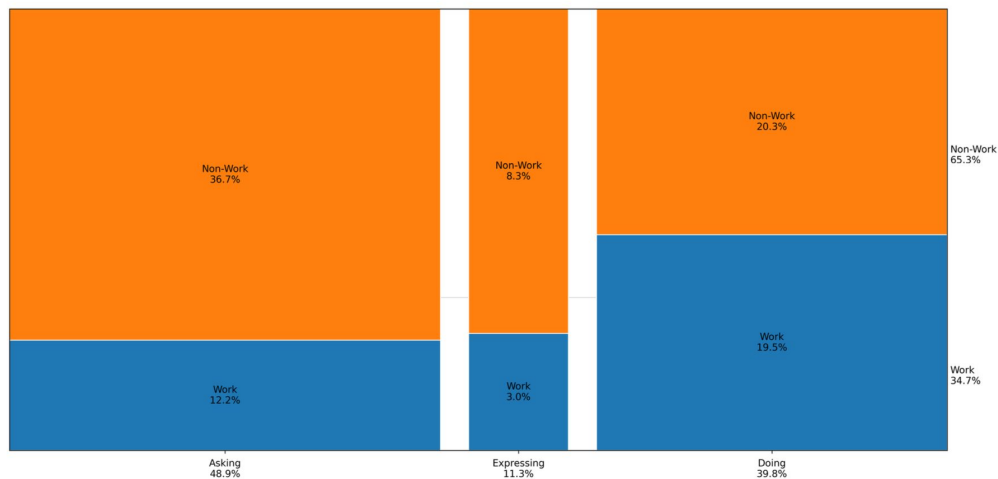


Figure 13: Shares of Asking, Doing, and Expressing messages split by work vs. non-work. See A to review the prompts used by the automated classifiers. The annotations on the right show the shares of work and non-work for the full sample. Each bin reports a percentage of the total population. Shares are calculated from a sample of approximately 1.1 million sampled conversations from May 15, 2024 through June 26, 2025. Observations are reweighted to reflect total message volumes on a given day. Sampling details available in Section 3.

Appendix

Study by OpenAI

[How people are using ChatGPT,](#)
September 2025

Most tasks are about getting information and making decisions.

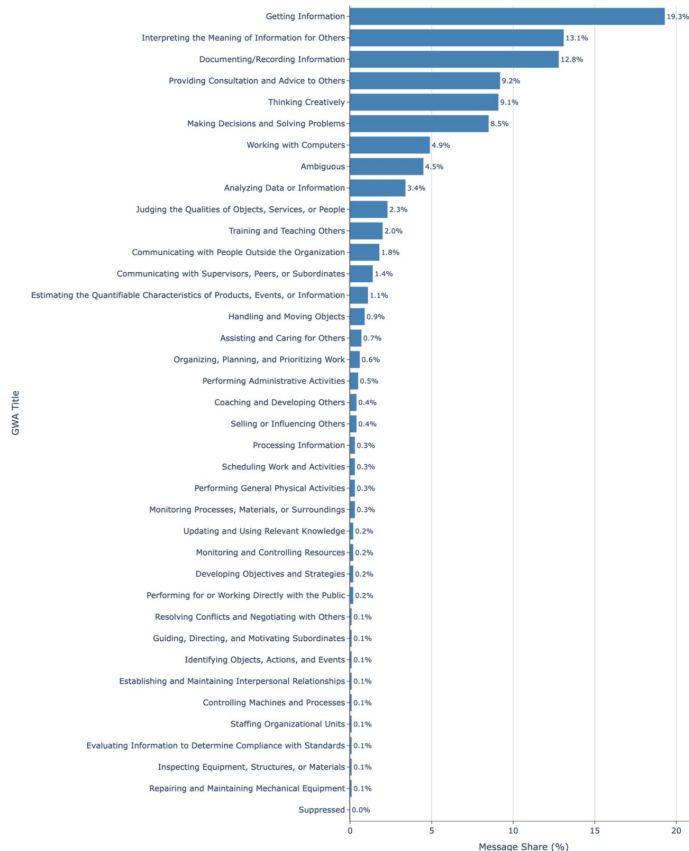


Figure 14: GWA Shares of 1.1M ChatGPT Messages. Messages are classified as pertaining to one of 332 O*NET IWAs, or *Ambiguous* using the prompt provided in the Appendix. IWAs were then aggregated to GWAs using the O*NET Work Activities taxonomy. Message sample from May 15, 2024 through June 26, 2025. We do not show the shares for the following GWAs as there were fewer than 100 users sending messages for each category and group them into *Suppressed*.

Appendix

Study by OpenAI

How people are using ChatGPT,
September 2025

ChatGPT has become a mainstream consumer product, used by men and women in the same way.

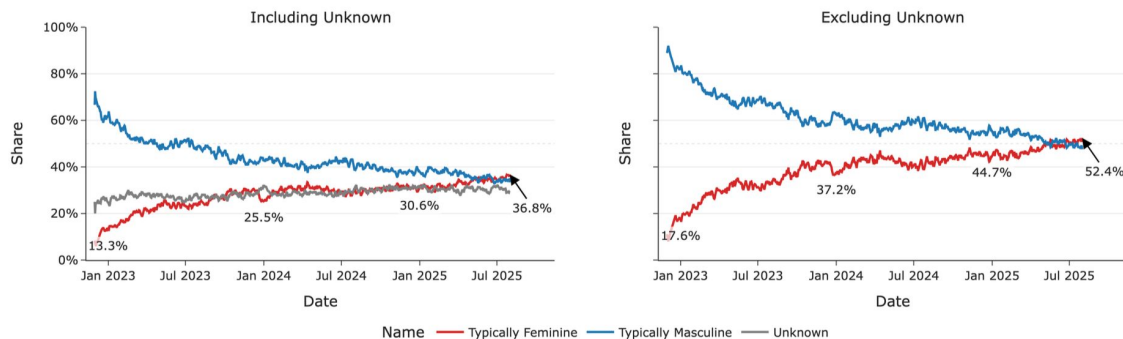


Figure 18: Breakdown of weekly active users by typically masculine and typically feminine first names. We draw on a uniform sample of 1.1M ChatGPT accounts, subject to the same user exclusion principles as other datasets we analyze. Note that this is a separate sample than those described in Section 3. First names are classified as typically masculine or typically feminine using public aggregated datasets of name-gender associations.

Appendix

Study by OpenAI

[How people are using ChatGPT,](#)
September 2025

ChatGPT has become a mainstream consumer product. Now evenly spread across all GDP levels. Growing particularly in low income countries.

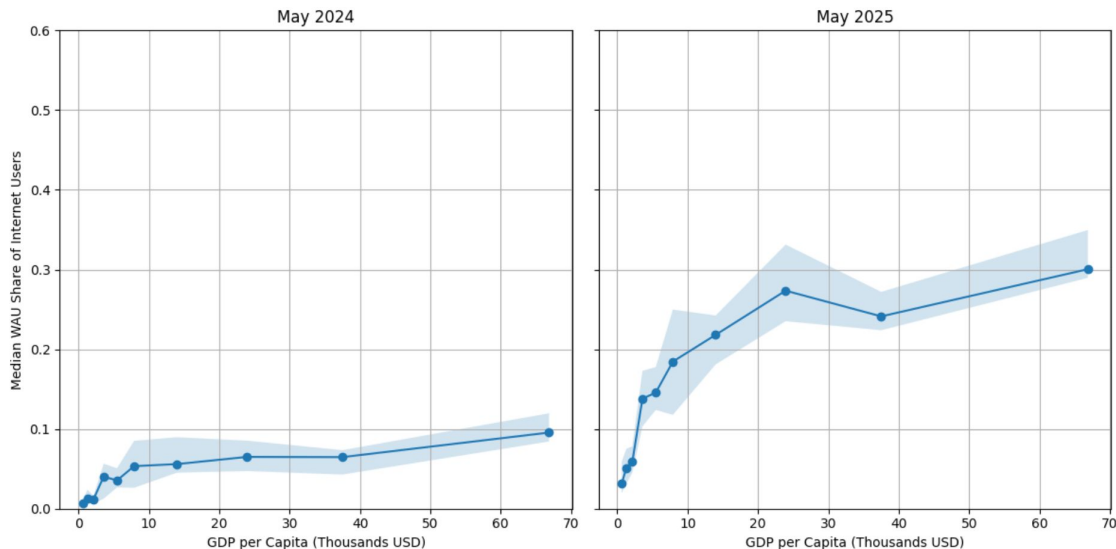


Figure 21: ChatGPT Weekly Active Users as Share of Internet Population vs GDP decile, May 2024 vs May 2025. Point estimates are medians within each decile. Internet Using Population uses 2023 estimates from the World Bank. Shaded regions indicate the interquartile range (25th–75th percentile) of country values within each GDP decile.

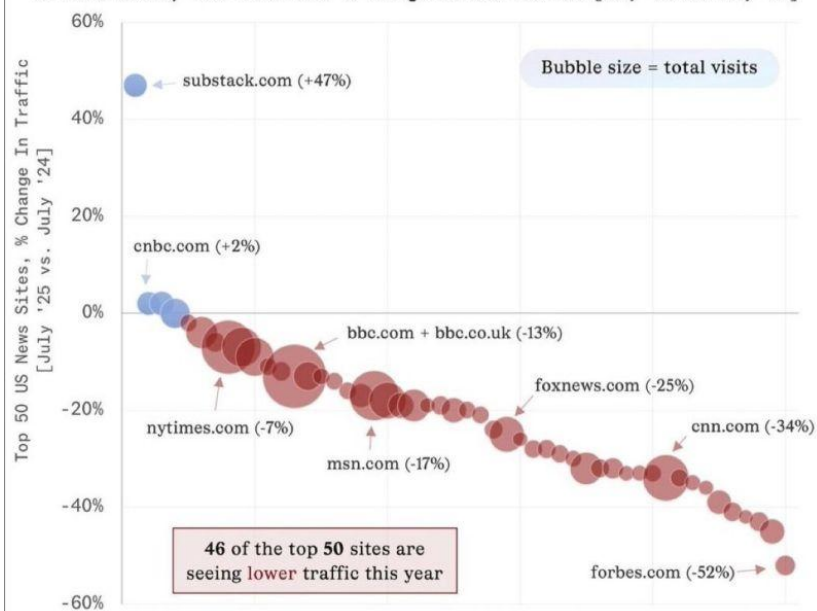
Appendix

US news websites, by Press Gazette

[Top 50 news websites in the US in October: Ten biggest sites see YoY traffic decline,](#)
August 2025

Major News Sites Are Seeing Huge Drops In Traffic

US News Sites, Year-over-Year % Change In Web Traffic [July '25 vs. July '24]



CHARTR

Source: Similarweb via Press Gazette

Appendix

Study by Seer Interactive

[AIO Impact on Google CTR:](#)
[September 2025 Update,](#)
[November 2025](#)

AI Overviews significantly affects CTRs for both organic and paid search. CTRs for both organic and paid decreased in the past year.

Paid & Organic CTR Trends — 12 Months (Oct'24-Sep'25)

DATE (MONTH YEAR)	ORGANIC CTR AIO NOT SHOWN	ORGANIC CTR AIO SHOWN	PAID CTR AIO NOT SHOWN	PAID CTR AIO SHOWN
SEP 2025	1.62%	0.61%	13.04%	6.34%
AUG 2025	1.43%	0.58%	14.52%	5.58%
JUL 2025	1.33%	0.57%	14.1%	3.26%
JUN 2025	1.72%	0.61%	14.99%	10.35%
MAY 2025	2.08%	0.76%	14.42%	11.5%
APR 2025	2.77%	0.86%	15.82%	13.03%
MAR 2025	3.12%	0.82%	15.53%	11.12%
FEB 2025	3.14%	0.73%	15.48%	10.51%
JAN 2025	2.53%	0.72%	15.83%	10.36%
DEC 2024	2.37%	0.82%	12.77%	11.8%
NOV 2024	2.19%	1.15%	13.44%	13.44%
OCT 2024	2.8%	1.19%	16.6%	14.92%

seerinteractive

STUDY: AIO IMPACT ON CTR | OCT'25 UPDATE

Appendix

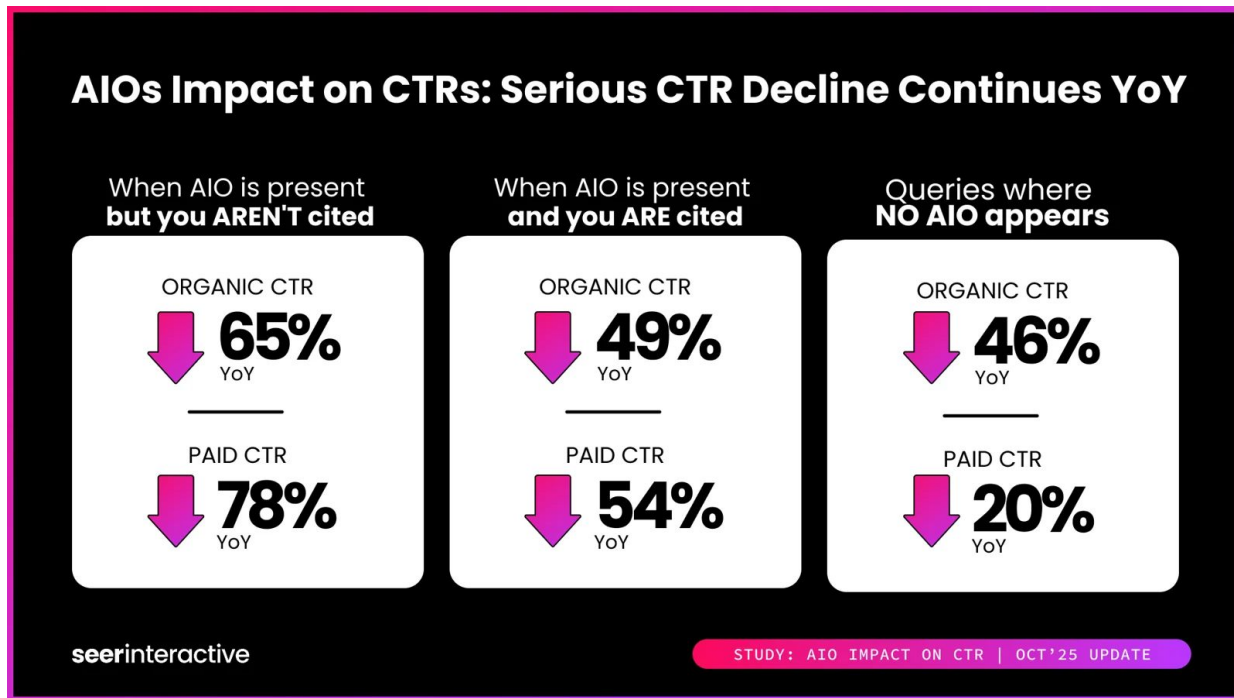
Study by Seer Interactive

[AIO Impact on Google CTR:](#)
[September 2025 Update,](#)

November 2025

Q3 2025 vs Q3 2024

CTRs are down across the board. But less so when AIO cites your brand. It could be because it means you're a stronger brand, or people actually click on citations more. Even when AIOs don't dominate the SERP, traditional organic results are struggling to maintain click-through rates for **informational or educational** queries.



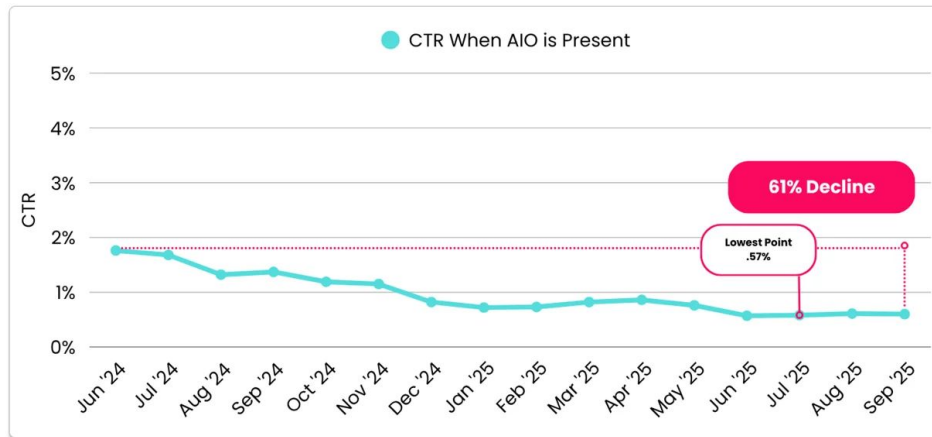
Appendix

Study by Seer Interactive

[AIO Impact on Google CTR:](#)
[September 2025 Update,](#)
November 2025

The decline in CTR for queries with AIO is consistent through the period, with a particular drop around mid-2025.

Organic CTR for Queries with AIOs has Declined 61%



seerinteractive

STUDY: AIO IMPACT ON CTR | OCT '25 UPDATE

Appendix

Study by Ahrefs

[What Triggers AI Overviews? 86 Factors and 146 Million SERPs Analyzed](#),

November 2025

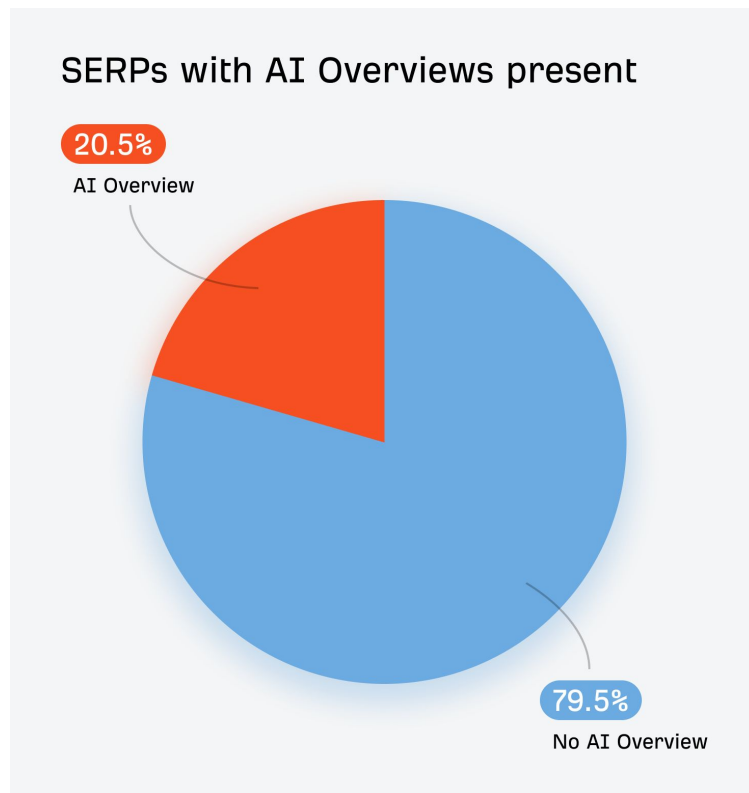
- AIOs appear on 21% of all keywords.
- 99.9% of AIOs appear on Informational intent keywords
- AIOs are 1.9x more common for non-branded keywords than branded keywords
- AIOs appear on 46% of 7+ word queries
- AIOs appear for 57.9% of all question queries
- 44.1% of life-important medical or financial queries trigger an AI Overview
- Only 6% of news queries trigger an AI Overview
- The categories with highest AIO share are Science (43.6%), Health (43.0%), Pets & Animals (36.8%), and People & Society (35.3%).
- The categories with lowest AIO share are Shopping (3.2%), Real Estate (5.8%), Sports (14.8%), and News (15.1%).
- Only 4% of NSFW queries trigger AIOs
- Only 7.9% of local searches trigger an AI Overview

Appendix

Study by Ahrefs

[What Triggers AI Overviews? 86 Factors and 146 Million SERPs Analyzed](#),
November 2025

AIOs appear on 21% of searches.



Appendix

Study by Ahrefs

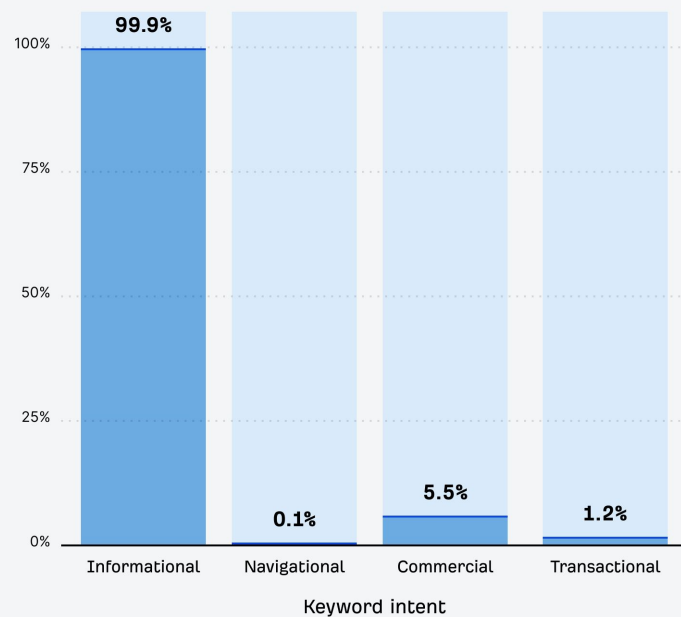
[What Triggers AI Overviews? 86 Factors and 146 Million SERPs Analyzed](#)

November 2025

99.9% of AIOs appear on Informational intent keywords.

AI Overview SERPs by keyword intent

Analysis of 146 million SERPs.



Appendix

Study by Ahrefs

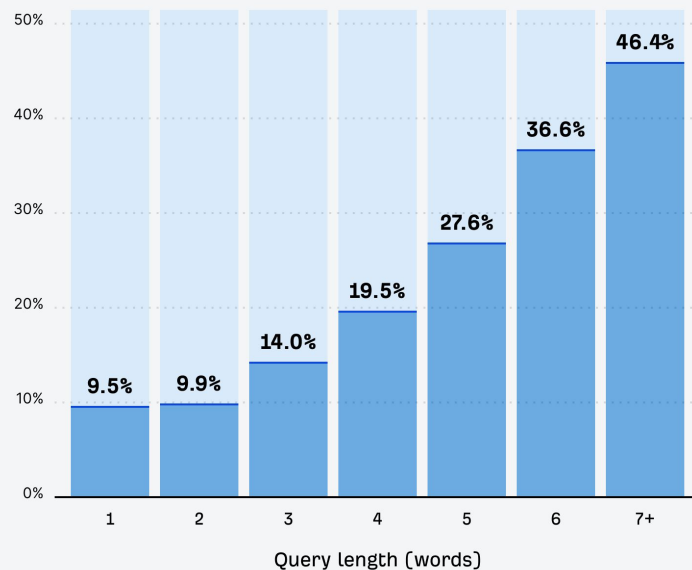
[What Triggers AI Overviews? 86 Factors and 146 Million SERPs Analyzed](#)

November 2025

AIO and AI Chatbots in general are good for making long conversations. For single-word navigational queries, including and especially brand names, traditional search is still more common.

Share of SERPs with AIOs by query length

Analysis of 146 million SERPs.



Appendix

Study by Ahrefs

[What Triggers AI Overviews? 86 Factors and 146 Million SERPs Analyzed,](#)

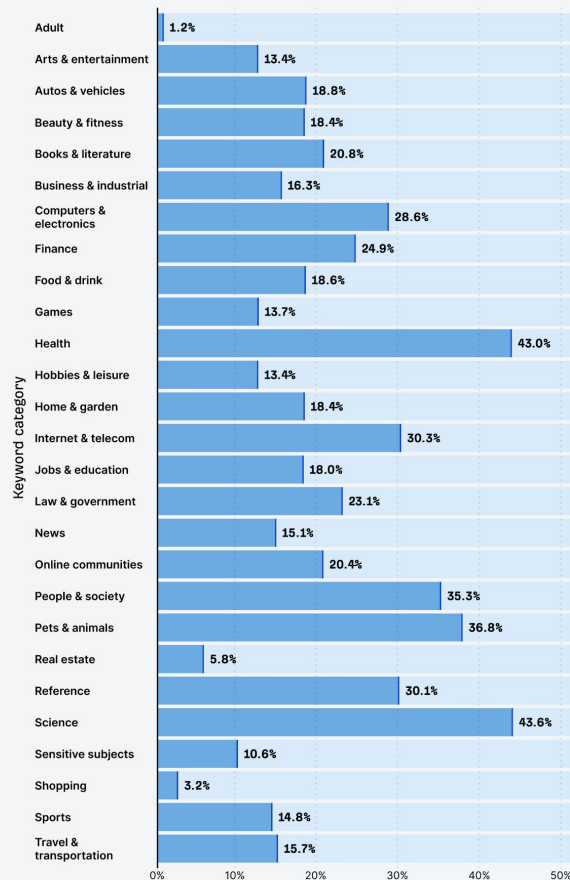
November 2025

Science (43.6%)
Health (43.0%)
Pets & Animals (36.8%)
People & Society (35.3%)
Internet & Telecom (30.3%)
Computers & Electronics (28.6%)

Shopping (3.2%)
Real Estate (5.8%)
Sports (14.8%)
News (15.1%)

Share of SERPs with AIOs by keyword category

Analysis of 146 million SERPs.



Appendix

Study by Ahrefs

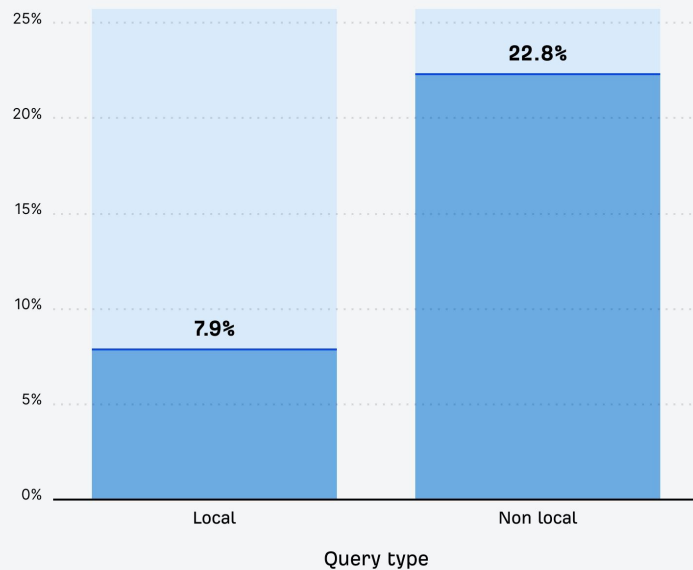
[What Triggers AI Overviews? 86 Factors and 146 Million SERPs Analyzed](#)

November 2025

Only 7.9% of local searches trigger an AI Overview

Share of SERPs with AIOs by query type

Analysis of 146 million SERPs.



Appendix

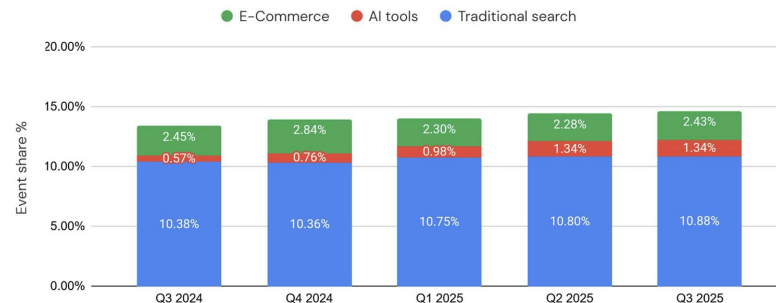
Study by Datas & Sparktoro

[State of Search Q3 2025: Behaviors, Trends, and Clicks Across the US & Europe, Q3 2025](#)

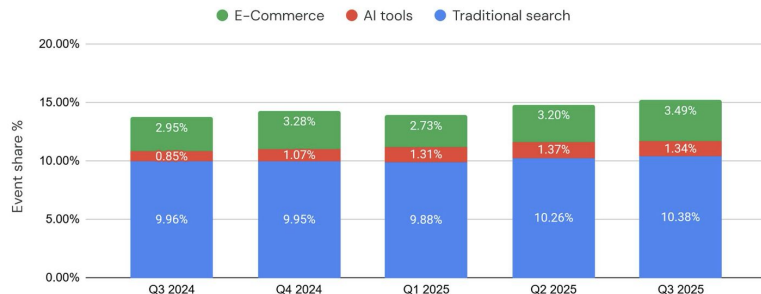
“The highpoint for both traditional search engines and AI tools hitting in September 2025 is further confirmation that AI usage isn’t cannibalizing Google/ Bing/ Yahoo/ DuckDuckGo. I strongly suspect that in years ahead, we’ll come to think of AI tool usage like social media – an entirely new category of its own.”

The point is: higher usage but fewer clicks.

Search, AI, and E-Commerce platform visits in the EU & UK



Search, AI, and E-Commerce platform visits in the US



Quarterly Events Share (%) = Quarterly visits to domain's webpages / Total quarterly webpage visits across entire panel * 100%

SparkToro

Source: Datas

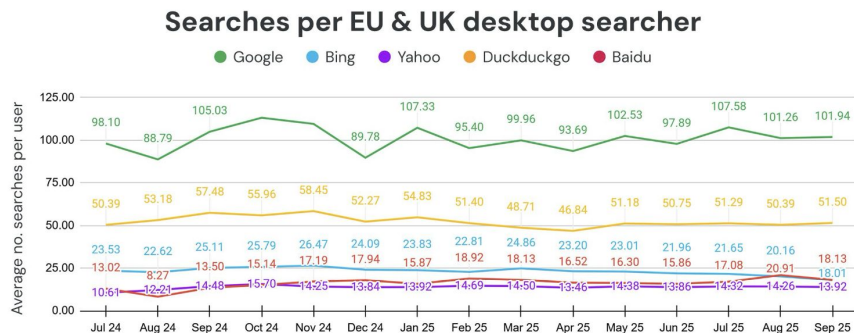
Datos
A Semrush Company

Appendix

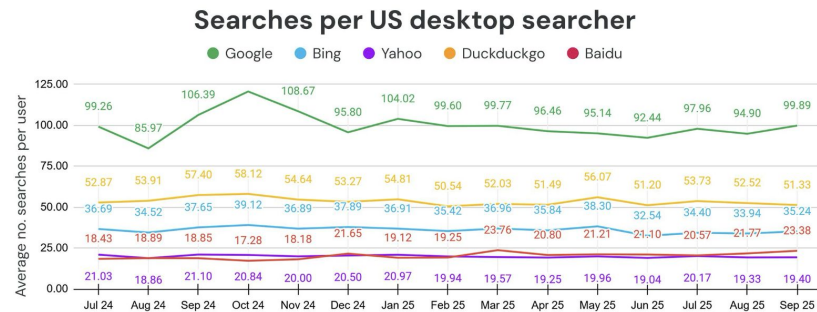
Study by Datos & Sparktoro

[State of Search Q3 2025: Behaviors, Trends, and Clicks Across the US & Europe,](#)
Q3 2025

Fairly stable amount of avg monthly searches.
Traditional search engines keep attracting users and searches. However, many of them now show AI answers.
It's not about higher or lower usage, it's about different behaviour.



Average number of searches per user = Sum of unique searches per user per day on a given domain, during the month /
Number of unique users who performed at least one search on a given domain



Average number of searches per user = Sum of unique searches per user per day on a given domain, during the month /
Number of unique users who performed at least one search on a given domain

SparkToro

Source: Datos

Datos
A Semrush Company

Appendix

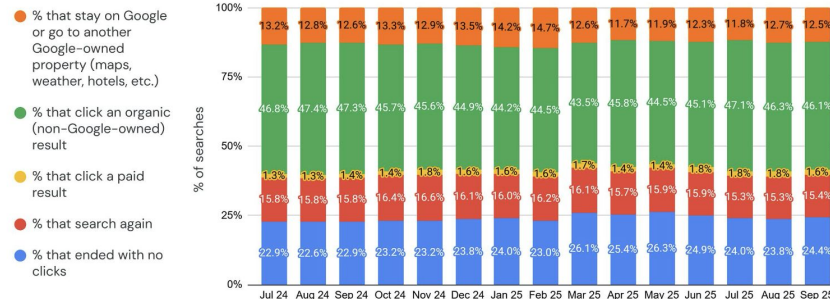
Study by Datos & Sparktoro

[State of Search Q3 2025: Behaviors, Trends, and Clicks](#)
[Across the US & Europe](#),
Q3 2025

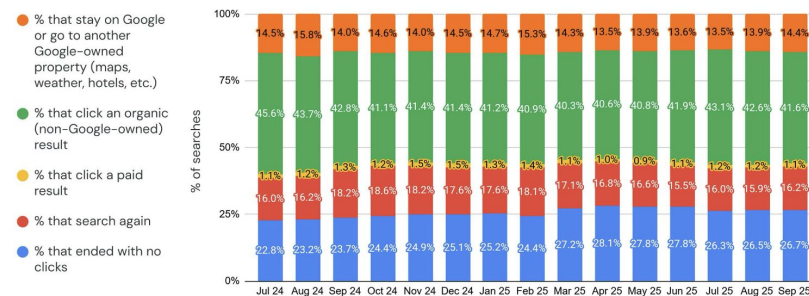
“The new normal promises to stay in the low 40s for percent of desktop searches that **send traffic to anyone but Google themselves**. Hopefully, a lot more marketers are thinking about how to influence people directly in the search results.”

Rand Fishkin, SparkToro Co-Founder and CEO

Distribution of Google EU & UK desktop search clicks over time



Distribution of Google US desktop search clicks over time



SparkToro

Source: Datos

Datos
A Semrush Company

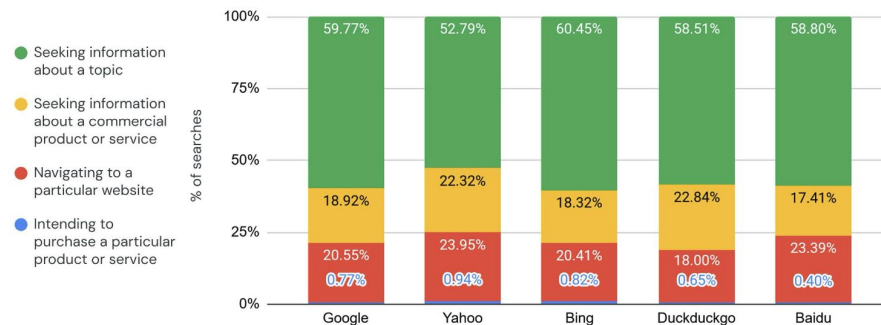
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Study by Datos & Sparktoro

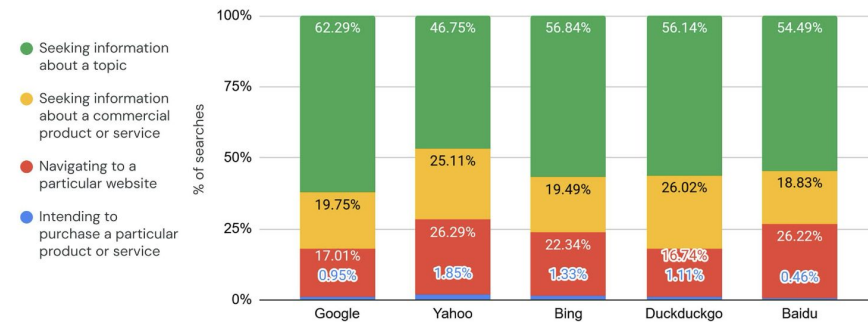
State of Search Q3 2025: Behaviors, Trends, and Clicks
Across the US & Europe,
Q3 2025

>60% of queries on Google are informational. This is where the AI game is played.

Categorization of EU & UK desktop search intent in Q3 2025



Categorization of US desktop search intent in Q3 2025



SparkToro

Source: Datos

Datos
A Semrush Company

Appendix

Study by Datos & Sparktoro

[State of Search Q3 2025: Behaviors, Trends, and Clicks Across the US & Europe, Q3 2025](#)

Top domains visited from EU & UK desktop traditional search engines

Q3 2024		Q3 2025	
1 Youtube	9 Steampowered	1 Youtube	9 Tiktok
2 Wikipedia	10 Tiktok	2 Reddit	10 Steampowered
3 Reddit	11 LinkedIn	3 Wikipedia	11 Fandom
4 Facebook	12 Chatgpt	4 Facebook	12 LinkedIn
5 Amazon	13 Github	5 Amazon	13 Ebay
6 Instagram	14 X	6 Instagram	14 Github
7 Microsoft	15 Ebay	7 Chatgpt	15 X
8 Fandom		8 Microsoft	

Source: Datos



Top domains visited from US desktop traditional search engines

Q3 2024		Q3 2025	
1 Youtube	9 LinkedIn	1 Youtube	9 Chatgpt
2 Reddit	10 Tiktok	2 Reddit	10 Microsoft
3 Amazon	11 Quora	3 Amazon	11 LinkedIn
4 Wikipedia	12 X	4 Wikipedia	12 Ebay
5 Facebook	13 Steampowered	5 Facebook	13 X
6 Instagram	14 Ebay	6 Instagram	14 Walmart
7 Microsoft	15 Imdb	7 Fandom	15 Steampowered
8 Fandom		8 Tiktok	

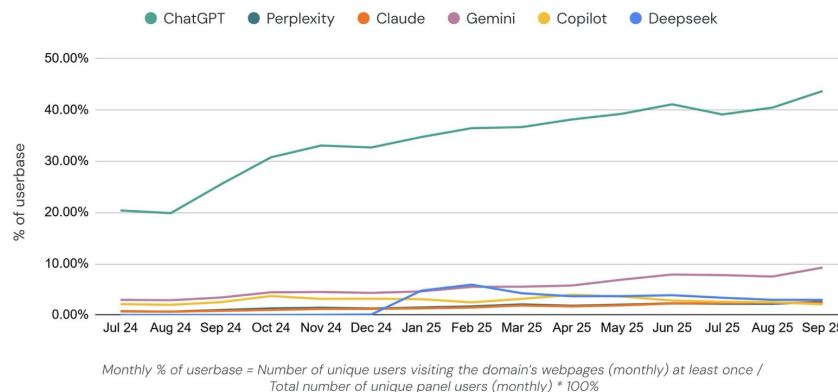
Appendix

Study by Datos & SparkToro

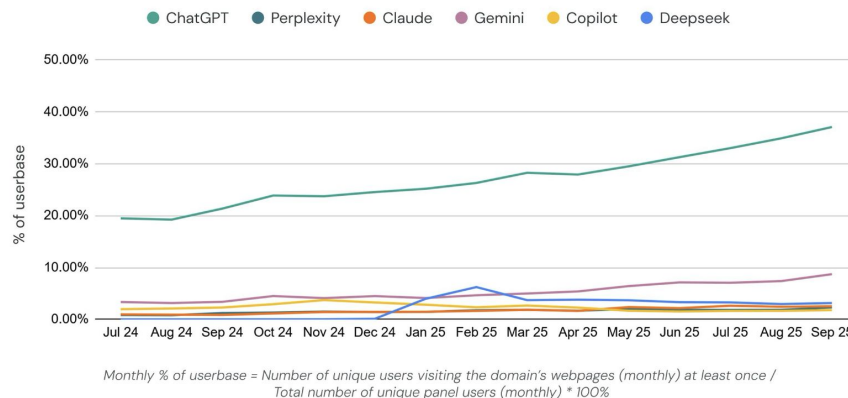
[State of Search Q3 2025: Behaviors, Trends, and Clicks Across the US & Europe, Q3 2025](#)

ChatGPT is the clear leader among AI Chatbots.
Gemini is growing, but still far behind.
Europe has higher GPT adoption than US.

Share of desktop users using AI in the EU & UK



Share of desktop users using AI in the US



Source: Datos

Appendix

Study by Datos & Sparktoro

[State of Search Q3 2025: Behaviors, Trends, and Clicks Across the US & Europe, Q3 2025](#)

AI chatbots send traffic to a wide variety of domains, highlighting their diversified use cases.

Top domains visited from EU & UK desktop AI tools

Q3 2024

1 Google	9 Bing
2 Youtube	10 Wikipedia
3 Github	11 Canva
4 Facebook	12 Chatgpt
5 Microsoft	13 Instagram
6 LinkedIn	14 Reddit
7 Amazon	15 Gemini
8 Whatsapp	

Q3 2025

1 Google	9 Chatgpt
2 Youtube	10 Instagram
3 Github	11 LinkedIn
4 Amazon	12 Whatsapp
5 Facebook	13 Canva
6 Reddit	14 Gemini
7 Wikipedia	15 Nih
8 Microsoft	

Source: Datos



AI-driven browsing expands its use cases

AI activity is not confined to general Q&A or content creation. The top AI destination domains, including GitHub, Wikipedia, NIH.gov, and Amazon, illustrating how AI is increasingly being used for coding, research, shopping, and professional learning. In both the US and Europe, traffic patterns show users leveraging AI tools as starting points for task-specific exploration, suggesting that AI has become embedded in the broader ecosystem of discovery and decision-making online.

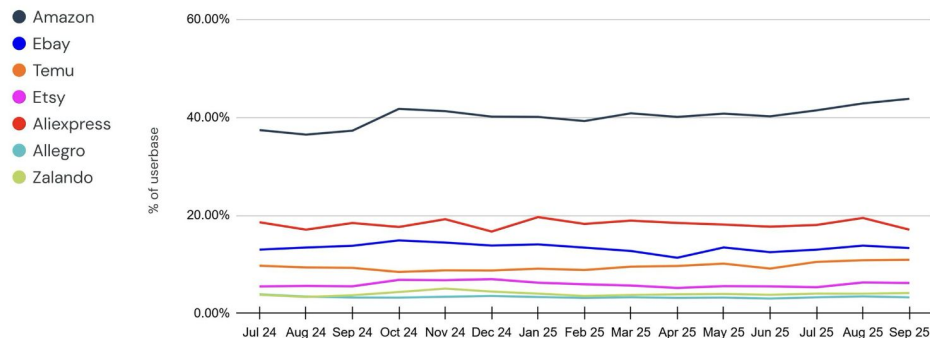
Appendix

Study by Datos & SparkToro

[State of Search Q3 2025: Behaviors, Trends, and Clicks Across the US & Europe, Q3 2025](#)

AI is not “stealing” users from eCommerce platforms.
Transactions still need to happen on-site.

Share of desktop users on e-commerce websites in the EU & UK



Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100%

SparkToro

Source: Datos

Datos
A Semrush Company

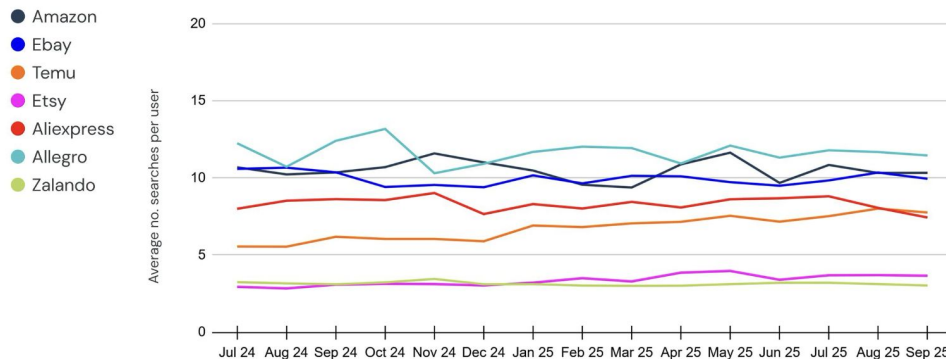
Appendix

Study by Datas & Sparktoro

[State of Search Q3 2025: Behaviors, Trends, and Clicks Across the US & Europe, Q3 2025](#)

On-platforms engagement remains steady.
More AI chatbot usage doesn't translate to lower ecommerce engagement.

Searches per searcher on desktop e-commerce platforms in the EU & UK



Average number of searches per user = Sum of unique searches per user per day on a given domain, during the month /
Number of unique users who performed at least one search on a given domain

SparkToro

Source: Datas

Datos
A Semrush Company

Appendix

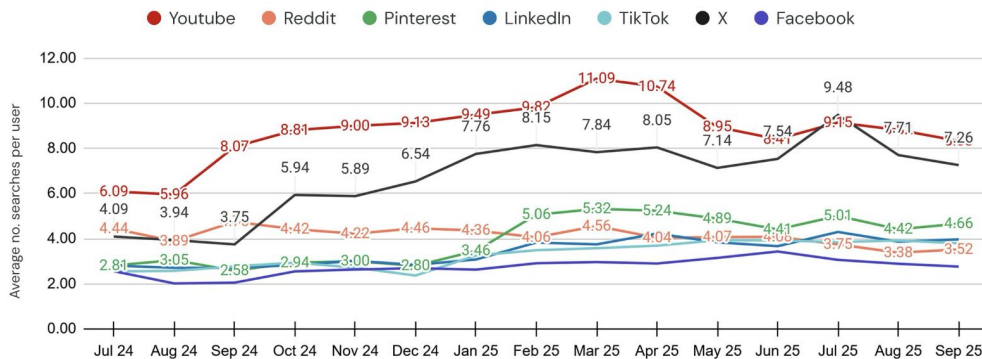
Study by Datos & Sparktoro

[State of Search Q3 2025: Behaviors, Trends, and Clicks Across the US & Europe, Q3 2025](#)

Same goes for social and entertainment platforms.

Actually, it seems in-platforms searches have increased, especially on YouTube and X.

Searches per EU & UK desktop user on content platforms



Average number of searches per user = Sum of unique searches per user per day on a given domain, during the month /
Number of unique users who performed at least one search on a given domain

SparkToro

Source: Datos

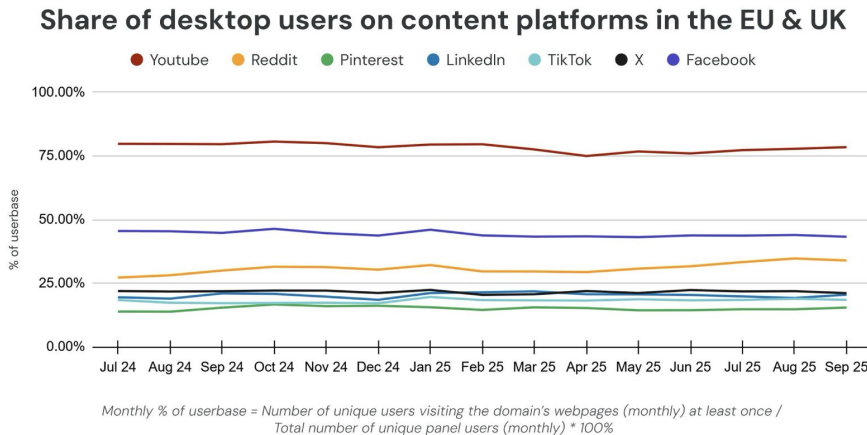
Datos
A Semrush Company

Appendix

Study by Datos & SparkToro

[State of Search Q3 2025: Behaviors, Trends, and Clicks Across the US & Europe, Q3 2025](#)

Reddit is almost matching Facebook in Europe. It has already surpassed it in the US.



SparkToro

Source: Datos

Datos
A Semrush Company

Rand's Take

Those Reddit numbers are shocking. I doubt anyone would have predicted 2 years ago that Reddit would overtake Facebook in desktop visits in the US and nearly match them in the EU and UK. As a marketer, I've personally found myself investing more in Reddit—the reach is undeniable, and the influence on other platforms (search engines, AI tools, and what people talk about on social media/in the press) makes it a must-participate, even in B2B.

Rand Fishkin
SparkToro Co-founder & CEO



Appendix

The Messy Middle (Google, 2020)

[The Messy Middle, Google Research](#)

Exposure:

always-on backdrop of a consumer's perceptions of brands and categories. It is influenced by advertising, word-of-mouth, etc.

Triggers:

what moves a consumer from a passive to an active buying state.

The messy middle:

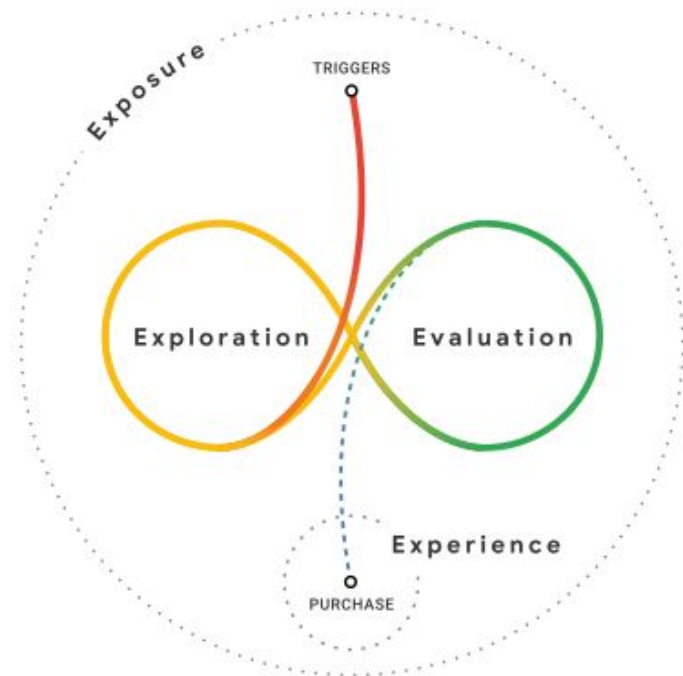
loop between the user's state of exploration and evaluation.

Purchase:

the act of the purchase in itself.

Experience:

the post-purchase interaction with the product, which feeds back into the consumer's future exposure.



Appendix

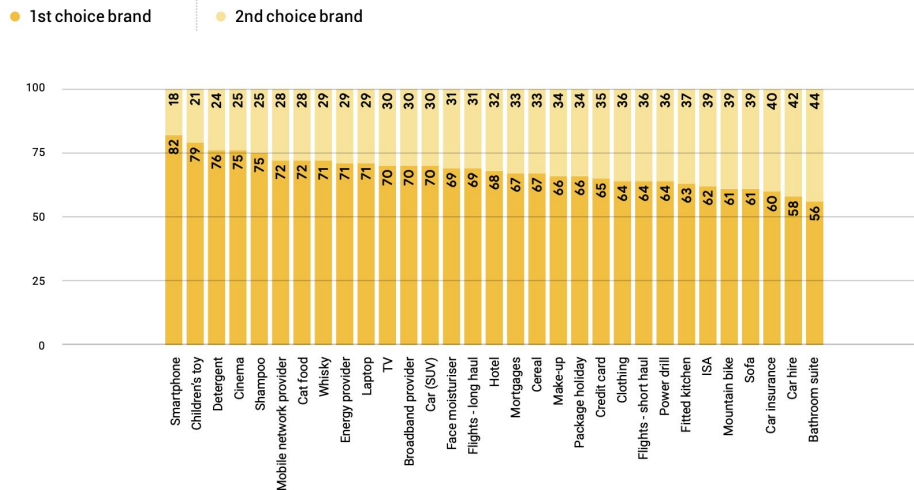
The Messy Middle (Google, 2020)

[The Messy Middle, Google Research](#)

The power of just showing up, aka being “omnipresent”:

“Simply giving the shopper the option to choose their second choice brand was enough to entice 30% away from their initial choice.”

Figure 5



Transfer of preference from first choice to second choice brand after introduction of second choice brand, all categories.

Appendix

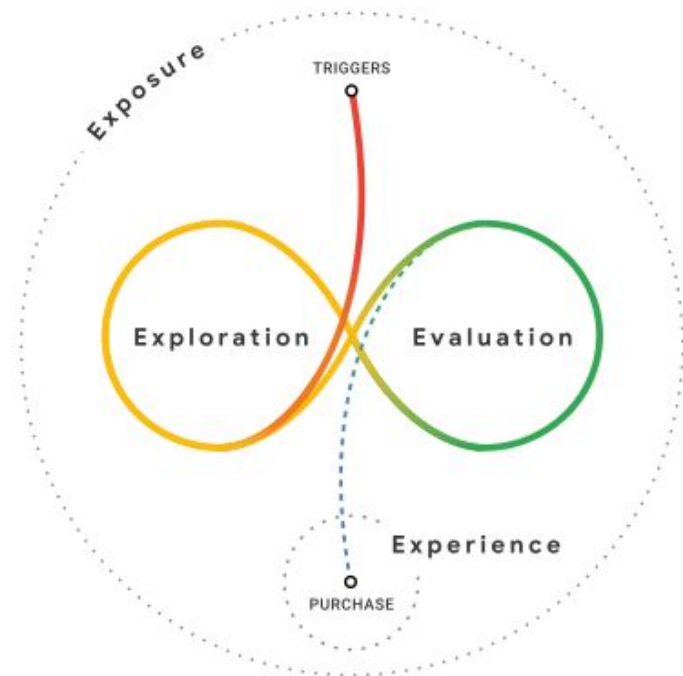
The Messy Middle (Google, 2020)

[The Messy Middle, Google Research](#)

*“The “messy middle” is also a good way to describe how marketing has evolved over the past decade or two, with the **polarisation between branding and direct response** creating a gap into which all sorts of valuable consumer behaviour goes unrecognised and underserved.”*

“Getting comfortable with the messy middle could ultimately help bridge organisational divides that our research suggests mean more to marketing departments than they do to consumers.”

*“Branding and performance, traditionally divided in many marketing organisations, **actually overlap in the messy middle.**”*



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