

EDGE^{EVOLVED}

Search Behavior In the Age of AI

HOW AI IS RESHAPING DISCOVERY, VISIBILITY, AND MEDIA STRATEGY

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EDGE

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EDGE is a marketing and media solutions company powered by Learfield's innovative technology and fueled by a data set of more than 125 million US consumers.

What We'll Cover Today

- 01** The Evolution of Search
- 02** AI-Driven Search Behavior
- 03** Discoverability in an AI Environment
- 04** Paid Search Impacts
- 05** Navigating the Road Ahead
- 06** Q & A

01

The Evolution of Search

FROM KEYWORDS AND BLUE LINKS TO AI-GENERATED ANSWERS AND
COMPRESSED JOURNEYS



A 20-Year Evolution of Search

FOUR DISTINCT ERAS THAT TRANSFORMED HOW BRANDS EARN VISIBILITY

The Keyword Era

2005-2012

- Search built around exact-match keywords and blue links
- SEO focused on backlinks, metadata, and keyword density
- Ranking position = visibility = traffic
- Paid search mirrored organic intent (text ads against queries)

The Semantic Era

2013-2017

- Google shifts to semantic search (Hummingbird, RankBrain)
- Search engines interpret meaning, not just keywords
- Mobile search surpasses desktop
- Featured snippets begin reducing clicks

The Experience Era

2018-2022

- Zero-click search accelerates (maps, knowledge panels, snippets)
- Search becomes visual (image, voice, YouTube)
- Consumer journeys fragment across Amazon, TikTok, Reddit
- Search becomes multi-platform, not just Google

The Answer Era

2023-Present

- Generative AI delivers synthesized answers vs link lists
- AI overviews compress multiple sources into one response
- Click-through rates decline as answers are served directly
- Brand visibility shifts from ranking #1 to being cited by AI

What Has Fundamentally Changed



1

Search moved from
navigation → interpretation
→ generation

2

Traffic is no longer
guaranteed by ranking

3

Discovery is increasingly
conversational

4

The “SERP” is being
replaced by the ANSWER

02

AI-Driven Search Behavior

HOW CONSUMER BEHAVIOR IS SHIFTING INSIDE AI-POWERED ENVIRONMENTS



Consumer Adoption at Speed and Scale

AI IS NOW WOVEN INTO THE FABRIC OF HOW CONSUMERS SEEK AND CONSUME INFORMATION

75M

RAPID ADOPTION

Google's AI Mode has already surpassed **75 million daily active users** highlighting how quickly AI-powered search interfaces are becoming part of everyday discovery.¹

75%

TRUST IS BUILDING

75% of Google AI Overview and/or AI Mode users agree they're able to make more confident decisions because of them.²

80%

AI SUMMARIES NOW THE NORM

About **80% of users** now resolve significant portions of their search directly through AI summaries or rich SERP features, reducing dependency on traditional search navigation.³

Fewer Scrolls. Faster Decisions.

AI ANSWERS ARE REDUCING NAVIGATION AND RESHAPING USER EXPLORATION BEHAVIOR

9%

REDUCED EXPLORATION BEHAVIOR

Only **9% of users** scroll to the bottom of page one, and AI answers further reduce user exploration beyond the top results.¹

3X

SEARCH IS BECOMING CONVERSATIONAL

Queries in AI Mode are **3x longer than traditional searches**, reflecting a shift toward conversational discovery.

1 IN 6

MULTI-MODAL SEARCH ADOPTION

1 in 6 AI Mode queries are now non-text (voice or image) demonstrating a rapidly growing adoption of multi-modal search.³

The Click is No Longer Guaranteed

ENGAGEMENT PATTERNS REVEAL ACCELERATING CLICK COMPRESSION IN AI-DRIVEN SEARCH

80%

ZERO CLICK SEARCH DOMINANCE

Up to **80% of searches** now end *without any external click*, reflecting users finding answers directly on the results page rather than clicking through.¹

60%

STEEP CLICK-THROUGH DECLINES

Organic and paid click-through rates can drop by **as much as 60%** when AI summaries (AI Overviews) appear, weakening the traditional link between rankings and traffic.²

13%

GROWTH OF AI OVERVIEWS

AI-generated overviews have expanded significantly — rising to **over 13% of global searches** within months — indicating AI's growing footprint in answer delivery.³

Coming Soon Now: Agentic Search

AGENTS ARE POWERING THE NEXT EVOLUTION OF DISCOVERY



PRODUCT RESEARCH

AI compares options, summarizes reviews, and recommends products based on user preferences.



TRANSACTION SUPPORT

Users can complete purchases or place orders without leaving the AI interface.



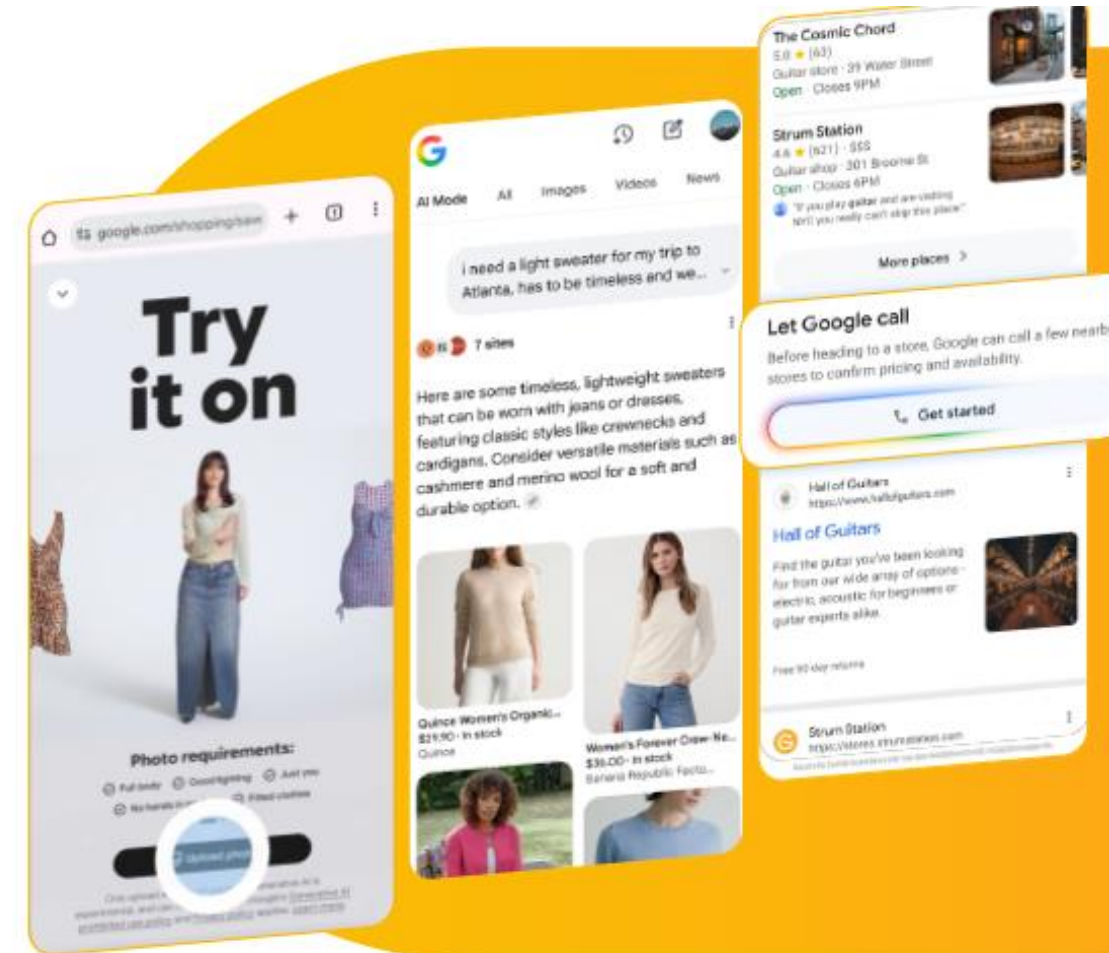
SERVICE COORDINATION

AI can call businesses, check availability, and make reservations on the user's behalf.



DECISION ASSISTANCE

AI synthesizes large volumes of information and delivers a clear recommendation.



What This Means For Brands

STRATEGIC IMPLICATIONS FOR VISIBILITY, DISCOVERY, AND DECISION INFLUENCE



THE CUSTOMER JOURNEY IS SHIFTING

- Search increasingly ends in answers, not clicks.
- Fewer steps separate question from decision.
- Discovery is becoming conversational, not navigational.

KEY TAKEAWAY: Brands must win earlier — before the click ever happens.



AI IS DRIVING BRAND DISCOVERY

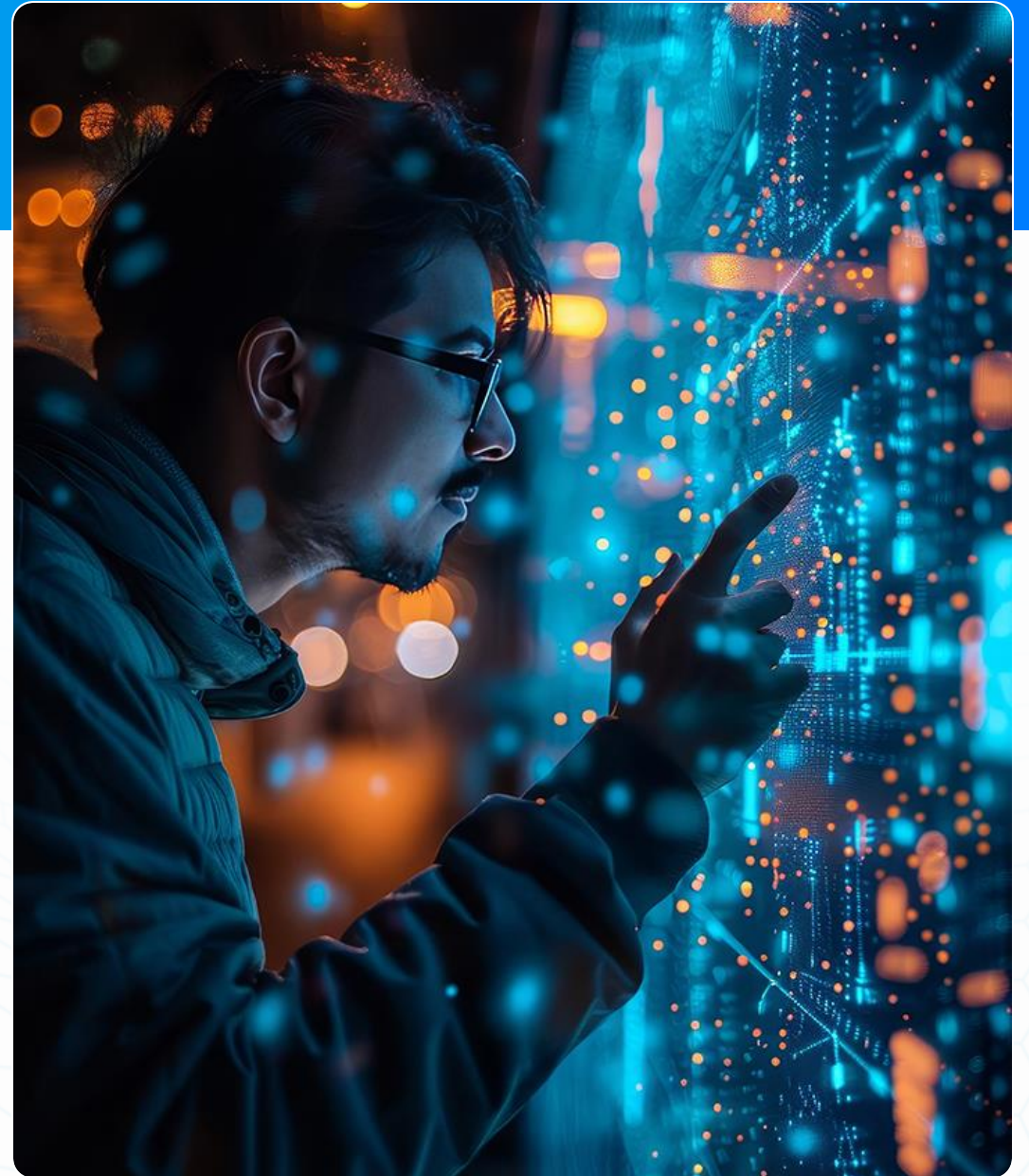
- AI summaries influence which brands are surfaced first.
- Inclusion in AI answers matters more than ranking #1.
- Visibility is shifting from websites to AI interfaces.

KEY TAKEAWAY: Visibility now depends on being surfaced by AI, not just ranked by search.

03

Discoverability in AI Environments

WINNING INCLUSION WHEN AI BECOMES THE PRIMARY
INTERFACE.



SEO is evolving from ranking optimization to answer optimization.

“AI-powered search engines and chatbots don’t operate on the same rules. Many AI tools synthesize results in real time... It’s no longer about being first on a list — it’s about being selected as the answer.”

- Jeffrey Herzog, CEO, Avenue Z

The Role of Search Engines Has Changed

Then



Search as a way finder

Now



Search as a consultant

What AI Prioritizes

OPTIMIZE TO BE SELECTED, NOT JUST RANKED

In an AI-driven search environment, visibility depends less on where you rank and more on whether your content is chosen as the answer. Traditional SEO chased clicks; modern optimization chases inclusion.

Brands must build structured, authoritative content that AI systems can extract, trust, and associate with the topics they want to own.



CLEAR, STRUCTURED, INTENT-DRIVEN CONTENT

- Content must directly answer specific user questions in a format that AI systems can easily parse, extract, and summarize.



AUTHORITY AND CREDIBILITY SIGNALS

- AI prioritizes sources that demonstrate expertise, trustworthiness, and strong third-party validation.



DEPTH, COMPLETENESS, AND CONTEXTUAL RELEVANCE

- Superficial answers lose to comprehensive explanations that fully address the topic and related queries.



STRONG BRAND-TOPIC ASSOCIATIONS

- Your brand must consistently appear alongside relevant subject matter so AI understands what you are definitively “known for.”

Winning the New Discoverability Game

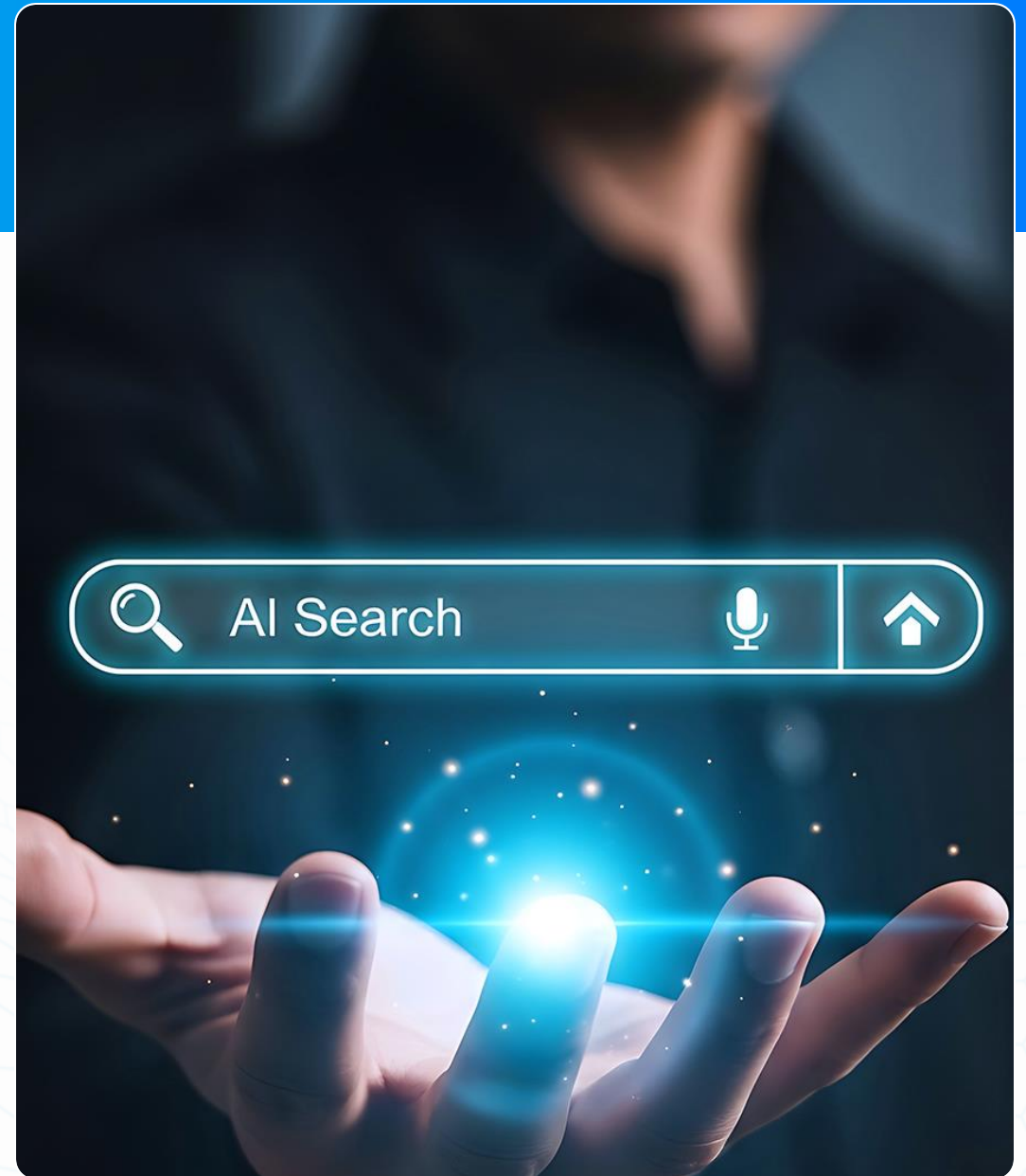
FOUR-STEP FRAMEWORK TO ENSURE YOUR BRAND IS STRUCTURED, TRUSTED, AND CONSISTENTLY SELECTED IN AI ANSWERS



04

Paid Search Impacts

HOW AI-NATIVE MONETIZATION IS RESHAPING
SPONSORED VISIBILITY



Paid Search is Evolving

SPONSORED VISIBILITY WILL LIKELY INTEGRATE DIRECTLY INTO AI RESPONSES.



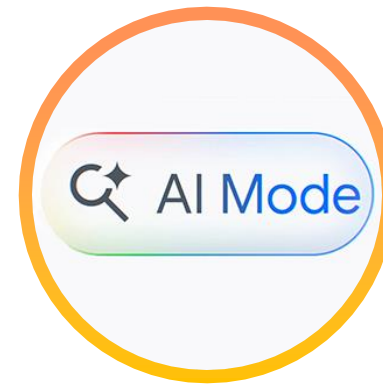
GOOGLE AI OVERVIEWS

Google now serves ads above, below, and within AI Overviews, blending sponsored content directly into generative answers via existing Search, Shopping, and Performance Max campaigns.



CHATGPT SPONSORED PLACEMENTS

ChatGPT is testing contextual sponsored placements below AI-generated answers, signaling experimentation with AI-native monetization.



GOOGLE AI MODE

Google is testing sponsored listings inside its Gemini-powered AI Mode, integrating ads directly within conversational AI responses.

44%

Of consumers surveyed report trusting AI responses over search ads.¹

50%

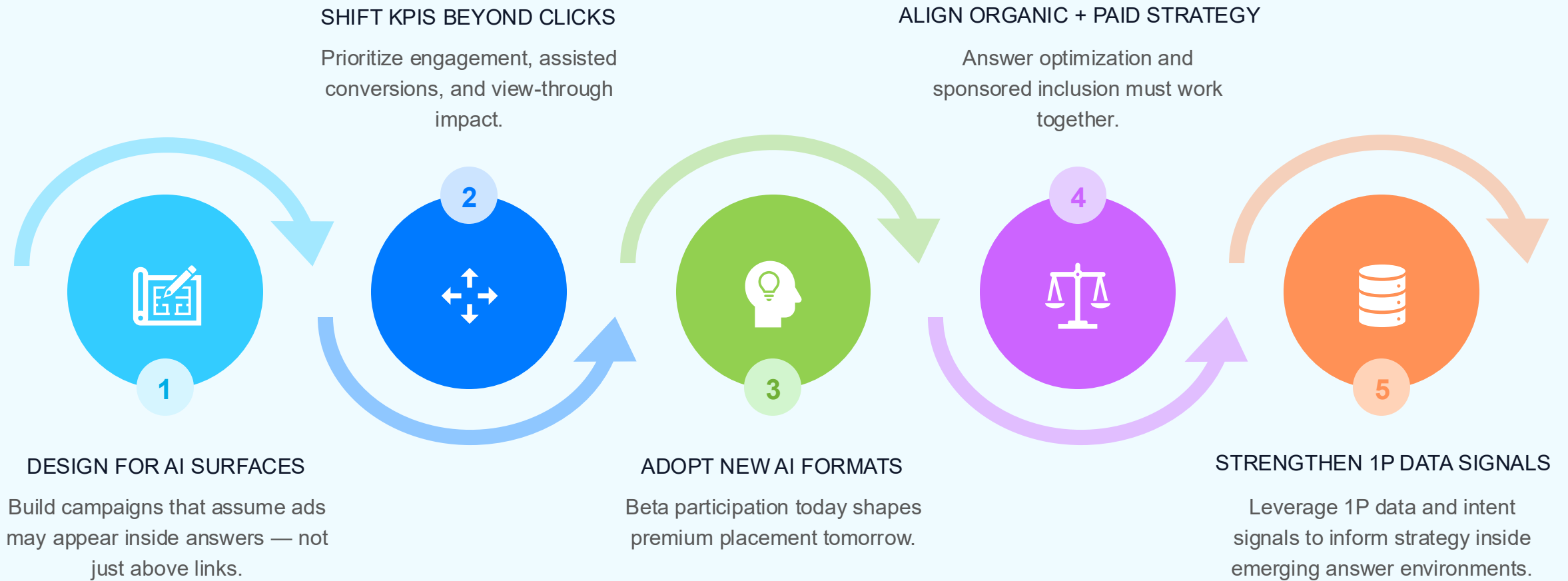
Increases in anticipated AI ad spend reported by brands over the next 3 years.²

\$29B

Annual AI search revenue expected by 2029.³

Rewiring Your Paid Search Strategy

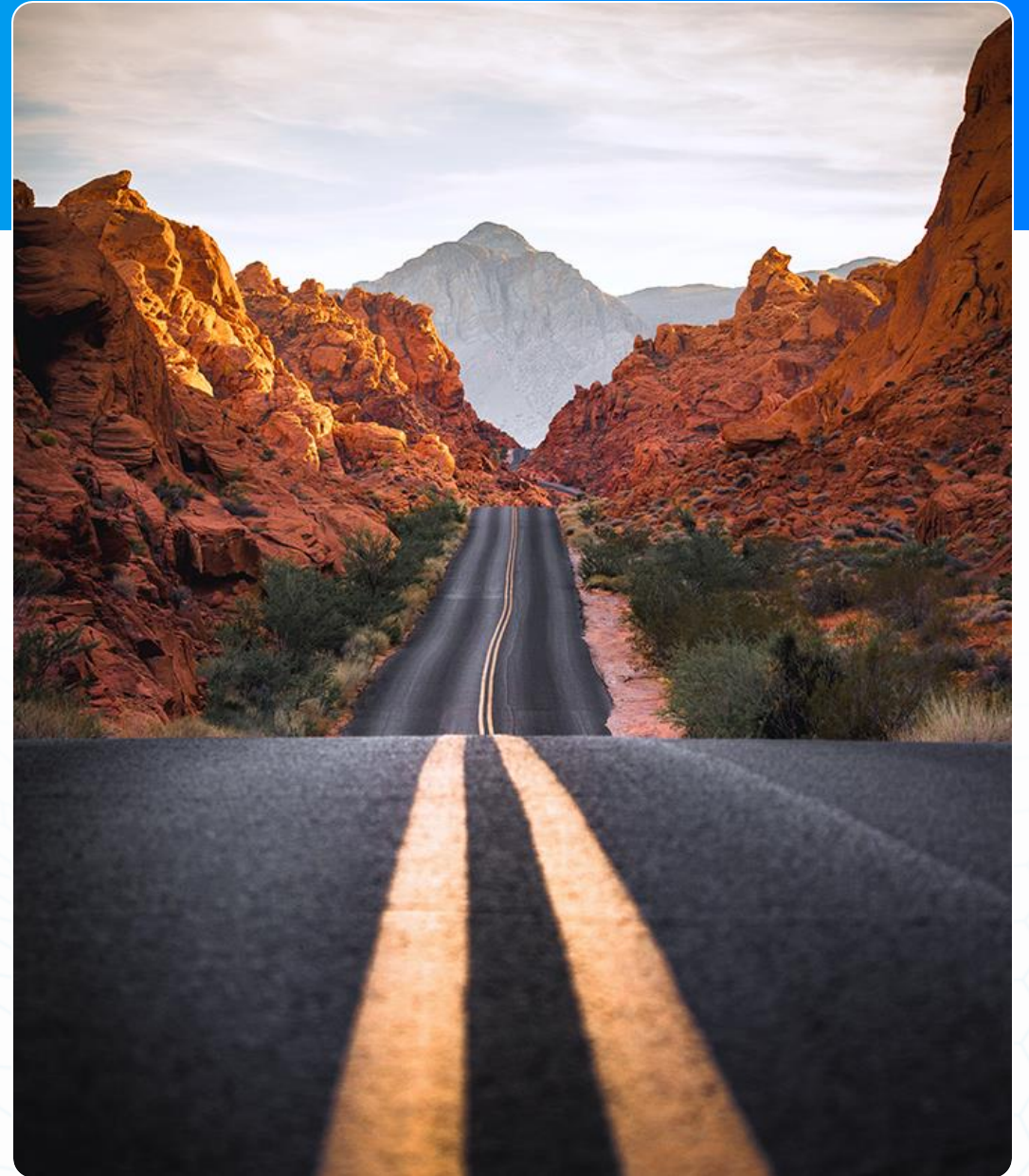
WINNING PAID SEARCH NOW REQUIRES AI-NATIVE STRATEGY



05

Navigating The Road Ahead

IMMEDIATE STRATEGIC MOVES FOR COMPETING IN AN
ANSWER-FIRST ECOSYSTEM.



What Brands Should Do Now

SPONSORED VISIBILITY WILL LIKELY INTEGRATE DIRECTLY INTO AI RESPONSES.

MEASUREMENT

Shift from last-click performance to engagement signals, assisted conversions, and view-through influence inside AI-driven journeys.

1P AUDIENCE INTEL

Strengthen audience data and intent modeling to inform bidding, targeting, and personalization within AI answer environments.

Rebuild

Redefine

Integrate

Invest

Prioritize

ANSWER VISIBILITY

Audit your top-performing content and re-architect it for AI extraction, citation, and inclusion — not just rankings.

ORGANIC AND PAID

Align answer optimization (AEO) with emerging AI-sponsored placements to ensure visibility whether inclusion is earned or paid.

CATEGORY INTENT

Map the decision-driving questions in your space — then systematically build content authority around them.

The Last Word

The brands that adapt fastest will own the answers — not just compete for the clicks.

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