Industry Report

21 Digital Marketing Experts on How AI Search Overviews are Changing Their Industry in 2025

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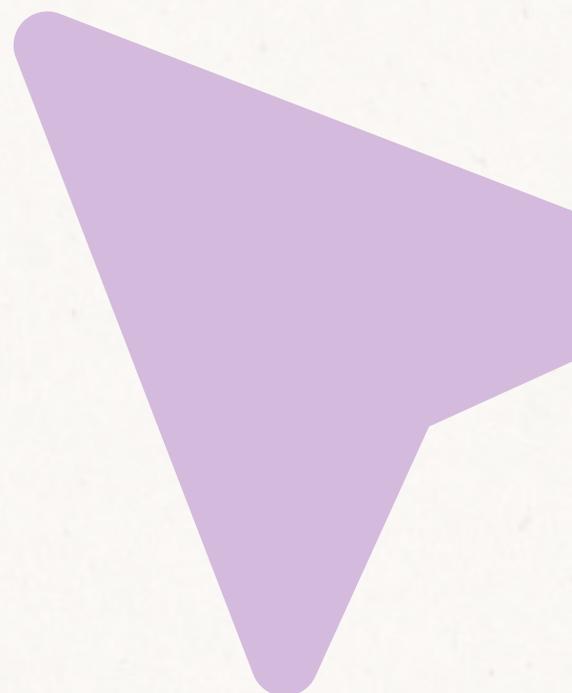**Kristen Ding**

SECTION OVERVIEW

INTRODUCTION: CURRENT SEARCH BEHAVIORS

Generative AI-powered search tools like Google AI Overviews continue to change the digital search ecosystem, made up of search engine companies like Google, consumers, and digital marketers.

FOR CONSUMERS

GenAI search reduces friction: instead of clicking through a list of ranked links, they receive a direct, AI-generated answer to their question. In web search, this is called a "zero-click" result—when the answer appears directly on the results page.

A recent industry report found that 80% of consumers now rely on zero-click results in at least 40% of their searches, reducing organic web traffic (search results that an advertiser did not pay for a consumer to see) by an estimated 15% to 25%.

Google (AI Overviews) and **Microsoft** (Bing Generative Search) both launched their GenAI search products in 2024. These new search products are the most recent example of a 15-year practice of reducing click-through rates. Google, for example, has provided features like rich snippets—restaurant reviews or social media profiles displayed separately from links directly in search results (introduced in 2009)—and the Knowledge Panel (2012) to display concise summaries from sources like Wikipedia.

FOR BRANDS + THEIR MARKETING PARTNERS

GenAI search continues to reduce digital ad revenue by diverting user attention away from ad-supported websites and limiting exposure to paid ad placements. The financial impact of this reduction in ad-supported search revenue is already visible. For example, Penske Media Corporation (PMC)–which owns publications like Rolling Stone, Billboard, and Variety–filed an antitrust lawsuit in September of 2025 against Google that alleges Google's AI Overviews use PMC's content without permission to generate search summaries, which resulted in a reported 20% decline in their overall traffic and more than a one-third drop in affiliate revenue.

But in the digital search market, Google dominates.
In 2025, Google Search is the most visited website in the world, and holds 90% of the share of the global search engine market.

This dominance leaves digital marketers to determine strategies within the limitations of the current search market. One common framework that is useful for navigating digital marketing strategy is the PESO model–Paid, Earned, Shared, and Owned media.

INFORMATIONAL CONCERN

Digital marketing experts expressed concern about how GenAI overviews are reshaping the information landscape that marketers rely on. They worry that AI systems may alter consumer behavior depending on the type of consumer intent, and how much data marketers can access about those behaviors.

In short, experts are uncertain about how AI search will change both the type of information consumers look for and the amount of actionable information available to marketers

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1、 CONSUMER INTENT
AI-generated summaries for quick answers, but the impact varies by intent

2、 CONSUMER INFORMATION AMOUNT
Tradeoff between faster insight generation versus fewer behavioral signals

3、 WHAT AI KNOWS ABOUT MARKETERS
Marketers must optimize for rules that can change without warning

1. CONSUMER SEARCH INTENT

Experts observed that AI-driven search is changing how brands are discovered online, but its effects vary by type of consumer intent. Traditional search behavior is often categorized as informational, commercial, or navigational. AI-generated overviews are unlikely to eliminate clicks entirely, because consumers with commercial or navigational intent will still seek direct access to products or services on specific websites.

Instead, AI search primarily decreases clicks for consumers with informational intent. Additionally, AI overviews may potentially alter the types of questions consumers ask. So while AI may streamline discovery for informational queries, it may not replace the direct engagement that drives commercial or navigational searches.

AI SUMMARIES AND GENAI CONTENT ARE MORE PREFERABLE BY CONSUMERS.

Consumers increasingly prefer AI-generated summaries for quick answers, but the impact varies by intent: AI replaces clicks for informational queries, while commercial and navigational searches still push users to traditional results.

> " *AI definitely has affected search... **People won't go through ten different websites anymore.** They'll read the summary and believe it.* "

—— A senior product and growth leader in enterprise AI + data technology

" *We saw a 49% decrease in click-through rate… the primary driver is zero-click searches where the user gets the answer in the AI overview.* **"**

—— A senior leader in digital marketing + AI-driven search strategy

While AI-driven search is often discussed as a single phenomenon, its impact varies significantly depending on consumer intent. Rather than eliminating engagement altogether, AI primarily reshapes how and when consumers seek information—changing the role of traditional search results across different stages of the funnel.

" *There's three main types of intent: information intent, commercial intent, navigation intent. Information intent has become an extremely low click-through environment…* **Why would they click? They never wanted to. Now they don't have to. But commercial intent—case studies, portfolios, who you are—still requires website visits… The idea of zero click search is absurd… lots of phrases never had website intent, but many still do.* **"**

—— A senior consumer insights and brand strategy leader

" *When I'm looking at a restaurant, I browse the menu first…* **AI changes how people get that information before deciding where to go.** **"**

—— A senior consumer insights and brand strategy leader

AI-generated summaries increasingly act as a pre-filter in the decision journey. By surfacing synthesized information early, AI shapes which brands enter consideration, compressing discovery while amplifying the importance of how brands are represented within AI outputs.

" *Separate your organic traffic into commercial intent and information intent… now you're going to be much more relaxed…. Watch conversion rates from AI sources versus traditional search sources. When someone comes through a website after doing a conversation with AI… they feel very qualified when they land on the page* "

—— A senior consumer insights and brand strategy leader

" *AI search is becoming more exploratory… you enter a prompt, get possible results, and refine them. But our current habits are ingrained, and we're not fully there yet.* "

—— A marketing and technology educator and doctoral researcher

" *Yes, there's a rise in zero-click behavior… in top-of-funnel behaviors. But decision life cycles vary by products. Booking a trip requires more content than buying groceries. Conversion doesn't need to drop; how customers land on a product is evolving.* "

—— A senior marketing + growth leader

Taken together, **these shifts suggest that AI search does not eliminate demand, but redistributes influence across the funnel**. As discovery becomes more mediated by AI, success is less about maximizing clicks and more about ensuring visibility, credibility, and clarity at the moments.

2. CONSUMER INFORMATION AMOUNT

Experts emphasized a paradox in how AI search affects the flow of consumer information. On one hand, AI-generated overviews reduce visibility into user behavior–marketers receive fewer clicks, impressions, and direct signals about how consumers interact with search results. On the other hand, generative AI tools provide new kinds of insights by producing two types of data with potential value: synthesized, and unbiased data. This tension leaves open important questions about what types of consumer information are being decreased versus increased in the age of AI search.

AI OVERVIEWS ARE CHANGING THE AMOUNT OF INFORMATION ON CONSUMERS MARKETERS CAN GET.

Consumers increasingly prefer AI-generated summaries for quick answers, but the impact varies by intent: AI replaces clicks for informational queries, while commercial and navigational searches still push users to traditional results.

> *Clicks from which types of key phrases are declining?... Top line traffic is down and that's totally normal. Google used to be 10 blue links. Not anymore.*

–– A senior product and growth leader in enterprise AI and data technology

> **"** *Keyword rankings and referral traffic from ChatGPT, Gemini, Copilot… are less than 1%, but the impact is greater than that. We look at referral traffic from ChatGPT, Gemini, Copilot… less than 1%, but the impact is greater.* **"**

—— A senior leader in digital marketing and AI-driven search strategy

AI search introduces a visibility paradox for marketers. While fewer clicks, impressions, and referral signals appear in traditional analytics, consumer exposure to brand-related information does not decline at the same rate. Instead, information consumption shifts upstream into AI-generated synthesis, outside standard measurement frameworks.

> **"** *For large datasets… people plug everything into GPT to get a summary quickly…ChatGPT's data comes from Wikipedia, LinkedIn, and older articles… new marketing efforts may take years to appear.* **"**

—— A senior product and growth leader in data technology

> **"** *Traditional search just passively delivers results. But AI search… asks 'Is this what you were looking for?' and prompts next steps.* **"**

—— A marketing and technology educator and doctoral researcher

Rather than reducing the amount of consumer information, AI restructures how information is surfaced and absorbed. Generative systems prioritize synthesis over breadth and established sources over recency, compressing discovery while introducing lag for new or updated brand signals. As a result, marketers face less observable data, even as AI plays a larger role in shaping consumer understanding and next steps.

3. WHAT AI KNOWS ABOUT MARKETERS

AI search forces a shift in how marketers think about visibility. Optimization no longer centers on ranking for queries on a results page. It centers on whether a brand becomes part of a model's internal understanding of a topic. This change moves influence upstream, away from links and toward how AI systems absorb and reuse information.

Many marketing teams still operate under legacy search logic. Keyword placement, page rank, and traffic volume remain default success metrics. These assumptions limit preparedness for generative engine optimization, where exposure depends on being referenced, summarized, and reframed by language models rather than clicked.

GEO BECOMES THE LEADING LOGIC, WHICH MAKES CONTENT MORE IMPORTANT

Experts agree that AI systems learn from structure, authority, and semantic clarity, not marketing intent. Brands compete less on visibility alone and more on how models interpret, organize, and reproduce their content. This creates new risks around framing, technical literacy, and long-term relevance as AI systems evolve faster than traditional optimization playbooks.

" *The biggest barrier is awareness—marketers still think in terms of ranking for keywords, not being referenced by a language model.*

"

—— A senior marketing operations and digital transformation leader

" *If I see Cleveland Clinic or Mayo Clinic cited… I look at how they structured content. That tells me what AI is learning from.* **"**

—— A senior leader in digital marketing and AI-driven search strategy

Brands remain anchored to legacy SEO logic, even as AI systems learn from structure, authority, and repeatable patterns rather than keyword optimization. Visibility increasingly depends on whether content is legible and reusable by language models, not whether it ranks on a results page.

" *Brands need to think not only about being visible, but how they are framed in the model's answer.* **"**

—— A senior marketing operations and digital transformation leader

" *Visibility isn't just about SEO anymore…it's about semantic authority and inclusion in the model's training context.* **"**

—— A senior AI and MarTech strategy leader

As AI synthesizes information, brand meaning becomes shaped by how models assemble and contextualize content. Presence alone does not ensure control. Brands compete on how they are represented within AI-generated narratives and conceptual associations.

> **"** *Most content teams don't understand how LLMs work... they don't know structured data, embeddings, or scraping.* **"**

—— A senior marketing operations and digital transformation leader

> **"** *By the time we finish optimizing for ChatGPT, the algorithm may have changed completely.* **"**

—— A marketing and technology educator and doctoral researcher

These challenges are intensified by limited technical fluency and rapid system change. Without clear insight into model behavior or stable optimization rules, marketers face uncertainty around how to influence AI systems, reinforcing the need for durable semantic authority rather than short-term tactics.

ORGANIZATIONAL CONCERN

A second major concern centers on how AI is changing the organization of marketing work. While many see the potential for AI to increase efficiency and collaboration, in practice it appears to be fragmenting workflows and discouraging teamwork.

Instead of integrating AI seamlessly into existing processes, experts described a growing tension within and between marketing teams as they adapt to these new tools.

1、 INTERNAL COLLABORATION
Marketing Teams Ability to Collaborate with Each Other using AI Tools

2、 EXTERNAL COLLABORATION
Marketing Teams Ability to Collaborate with External Teams Using AI Tools

1.MARKETING TEAMS ABILITY TO COLLABORATE WITH EACH OTHER USING AI TOOLS

Experts described a growing organizational tension as AI tools become part of marketing workflows. Ideally, AI could support shared creativity and strengthen collaboration across teams. However, participants reported the opposite trend: AI adoption is often siloed, with individuals experimenting on their own rather than integrating tools into collective processes. This fragmentation can weaken coordination within departments and reduce opportunities for learning and feedback. In this way, rather than fostering collaboration, AI may inadvertently discourage it—both internally among marketing teams and externally with clients or partner organizations.

INTERNAL COLLABORATION

Inside marketing teams, AI speeds up ideation, helps unify complex brand narratives into clearer and coherent messages, and is increasingly used naturally in everyday tools.

> "
> But internally, again, I think that anything that accelerates our ideation, our creative processes, I think that's where AI really comes into play… so that we have **more space to do creative writing, creative execution**, uncovering the truths and the insights around our consumers and **finding stronger strategies to reach them**. "

—— A marketing professional in the CPG sector

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AI would be really helpful in **creating the context**... we do a lot of things for transportation, we provide a lot of financial services... but where we're the most powerful is when we are a full bundled product... taking all of those things that we do and **creating a succinct, in-context search result** that... condenses down and **shows what value this company provides**... is what it (AI) can provide.

"

—— A senior marketing professional in B2B SaaS and financial services

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In any case... it's informal, though... a lot of **platforms have already integrated it**... So we use HubSpot, for example, as our content management system and our CRM, our customer relationship management system and HubSpot, have already integrated AI in a number of ways. Adobe is integrated AI, so we're definitely using it within our systems already.

"

—— A nonprofit marketing and business development leader

THE COMPLEXITY OF INTERNAL COLLABORATION

Inside marketing teams, AI speeds up ideation, helps unify complex brand narratives into clearer and coherent messages, and is increasingly used naturally in everyday tools.

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We have a diligent publishing process... the staff writer that writes our news story is not the one that actually publishes it to our website... we may use AI for brainstorming or SEO research but **not for public content**, because for the audience that we're serving in physicians, the details matter... **one missed word could hurt our credibility**.

"

—— A digital strategy leader in the healthcare sector

"

We're trying to make a decision on an enterprise tool... people have decided to use AI on their own time or for their specific use cases... we're in that crawl place where we're just learning and understanding what we know and what we don't know... then we'll get to make a decision on a tool and hopefully progress to a walk stage... It's being **used in various degrees across our enterprise**.

"

—— A senior marketing professional in B2B SaaS and financial services

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Now here's the issue—**it wasn't scalable**. That entire campaign came from one person... who understood how to express Wendy's brand personality online... AI can enable her to scale herself... feed the brand voice into the system—'This is how I want it to sound.' **AI lets her extend herself and keep the brand personality consistent across platforms**. But the brand still has to be the **catalyst**... AI won't pick up small, fast-moving cultural signals unless a human says, 'That's funny—go make fun of that.'

"

—— A digital marketing and education professional

2.MARKETING TEAMS ABILITY TO COLLABORATE WITH EXTERNAL TEAMS USING AI TOOLS

As AI enters cross-organizational workflows, its impact on external collaboration has become increasingly complex, reshaping how teams initiate, manage, and even define their work with partners. While these tools promise faster alignment and smoother exchanges, experts described a more complicated reality in practice – one where AI subtly shifts the structure and expectations of collaboration across organizational boundaries.

EXTERNAL COLLABORATION

AI improves early-stage external collaboration by allowing marketers to quickly produce mock-ups and share ideas with partners.

> "
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> AI quick turnaround and come up with a mock up, but we want it to be **internal facing**, primarily because not everything will be **branded**, and it might not follow **brand and compliance guidelines**… when we're trying to just sell in ideas, it's a good approach to take so that we don't have to wait for that longer lead time or charge agency hours. So it's a great way to **pull together** any **ideas** that we have and, like, showcase how it comes to life without committing resources.
>
> "

—— A marketing professional in the CPG sector

THE COMPLEXITY OF EXTERNAL COLLABORATION

AI introduces a set of new frictions in cross-organizational work, from the impersonal tone of AI-generated communication to tighter confidentiality and authorship restrictions, and even the risk that AI's decision-support capabilities may narrow the role traditionally played by external partners.

" Yeah, that's the piece. It could really hurt you if you end up sending out an email sequence that comes across as **tone deaf** and **impersonal and clearly auto generated**… it could actually do **harm** if you have **a close relationship with somebody**, and they start getting these auto generated emails and they're like, What? "

—— A nonprofit marketing and business development leader

" We're a consultancy, which means that we work with client data and client information all day long, which is **highly confidential**… making sure that we're not intentionally or unintentionally sharing confidential data or information that could be used or spread through… this kind of **guideline** is, like, very necessary, and it's desperately needed… every user is very concerned about, like, how to properly use AI, and how could AI be **safe to use** whenever we want to. "

—— A nonprofit marketing and business development leader

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We have not yet used it in content creation… beyond consumer **privacy concerns and just authenticity**… we do have the second largest continually published medical journal… We want to take their lead, learning from how they're navigating intellectual property concerns, authorship concerns… We don't use it in content creation, but we use it for understanding our go-to-market strategy in this new world where AI and zero-click searches are more relevant… We feel very strongly that **authorship** is very important.

"

—— A digital strategy leader in the healthcare sector

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In a corporate enterprise, you have a full team—legal, strategy, finance, all that. But in startups, if you want legal advice, you have to pay a lawyer out of pocket… Now, I'm not saying AI replaces legal counsel, but it can help you think through an issue enough to know whether you need to engage one… They're not just 'search engines'—they're **decision-support systems**.

"

—— A digital marketing leader in a major health system

DISCUSSION AND FUTURE RESEARCH DIRECTION

The findings from these interviews point to several promising directions for future research on how AI search technologies are reshaping marketing practice.

First, questions remain about how AI-generated search results will influence consumer search intent. Future studies could examine which types of intent—informational, commercial, or navigational—are most affected by AI overviews, and whether entirely new forms of intent emerge as consumers engage with conversational, generative interfaces. Understanding these shifts will be critical for marketers seeking to anticipate changes in audience behavior and align their strategies accordingly.

Second, future research should explore the changing amount and quality of consumer information available to marketers. Experts described a dual effect: AI search reduces access to traditional behavioral data but expands opportunities to generate synthetic or model-based insights. Empirical work is needed to identify what kinds of consumer information are being gained through generative tools and what types are being lost, as well as how these changes influence targeting, measurement, and strategic decision-making.

DISCUSSION AND FUTURE RESEARCH DIRECTION

Finally, the findings raise further questions about the organizational effects of AI integration within marketing departments. While AI has the potential to facilitate collaboration, the interviews suggest it may instead be encouraging individual or siloed experimentation. Future research should investigate how AI adoption affects a marketing team's ability to collaborate both internally across roles and functions and externally—with clients, agencies, and partners.

1
Informational Concern RQ:
Which type of consumer intent will be affected by AI Overviews?

2
Informational Concern RQ:
What specific consumer info we get more?

3
Informational Concern RQ:
What specific consumer info we get less?

4
Organizational Concern RQ:
How does AI affect marketing department's ability to collaborate internally?

5
Organizational Concern RQ:
How does AI affect marketing department's ability to collaborate externally?

IMC
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THANK YOU