

The Al Search Disruption: How GEN Al is Reshaping Search Engine



- The Rise of Gen Al
- Gen Al's Impact on Search Engine
- ChatGPT vs. Google
- Google's AI Overview: Changing How We Search
- Summary and Recommendations
- Understanding Generative Engine Optimization (GEO)

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The Rise of GEN AI

ChatGPT Dominates in Daily Active user and Daily Queries

	Al chatbot	MAUs	DAUs		Queries / DAU		Daily Queries
\$	ChatGPT	>600M	~160M) 🖾	-7-8		1200M
0	MetaAl	>800M	~100M	ß	~2-3	\square	>200M
Gemini	Gemini	>350M	~35M	ß	~4		~140M
ø	Grok	NA	~15M	ß	~3-7	\square	~75M
CY	DeepSeek	~140M	~10M	ß	-3-7		~50M
贷	Perplexity	>30M	~7M	ß	~4		~30M

Note: Data as of March 28, 2025, DeepSeek excludes China usage Source: Company disclosures, SensorTower, AppAnnie, SimilarWeb, Market Intelligence estimates (Br Google RDXD-04.008

ChatGPT has the most spread usage in terms of daily queries and daily usage

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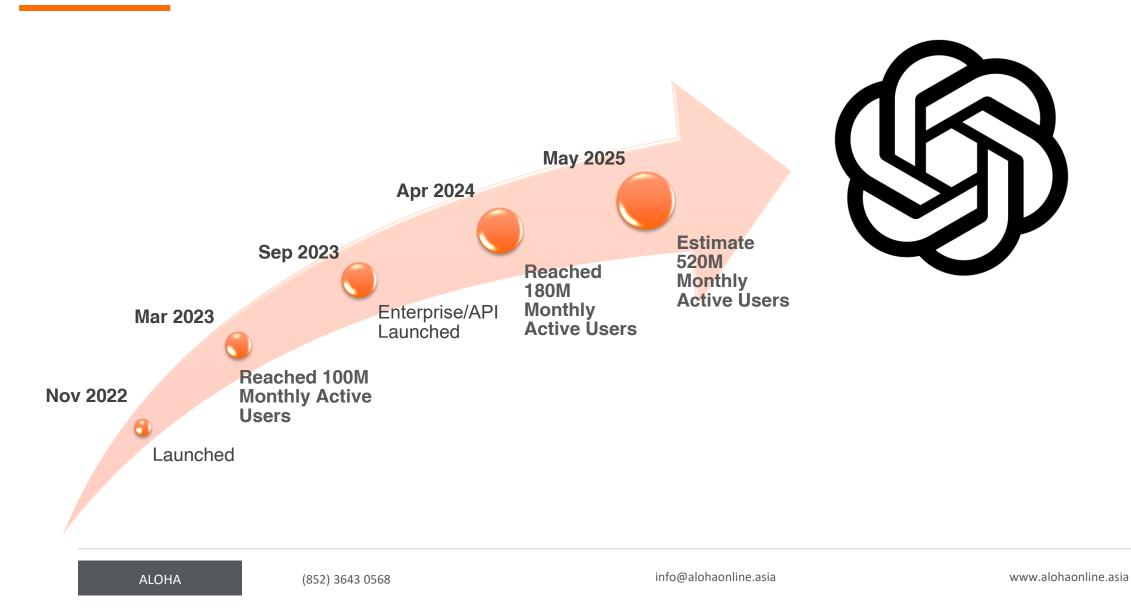
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Source: https://www.businessinsider.com/google-gemini-usage-surging-rivals-chatgpt-meta-dominating-2025-4

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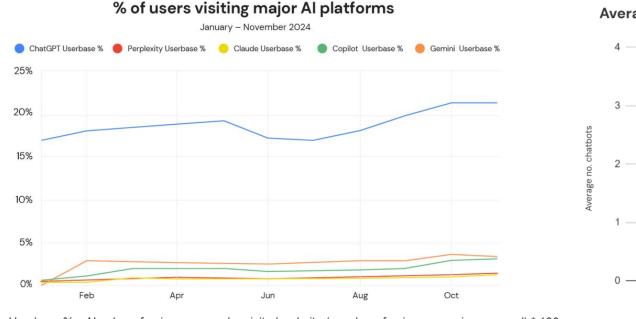
ChatGPT Gaining Popularity Since 2023



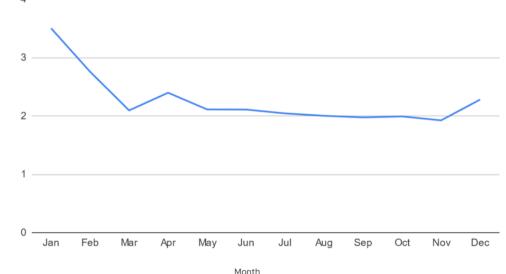
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Gen Al Consolidation: ChatGPT Emerges as the Platform of Choice



Average number of unique chatbots used, per user per month 2024



Userbase % = Number of unique users who visited website / number of unique users in our panel) * 100

- Percentage of users using ChatGPT has shown growth over 2024
- On average, users engage with two Gen AI platforms

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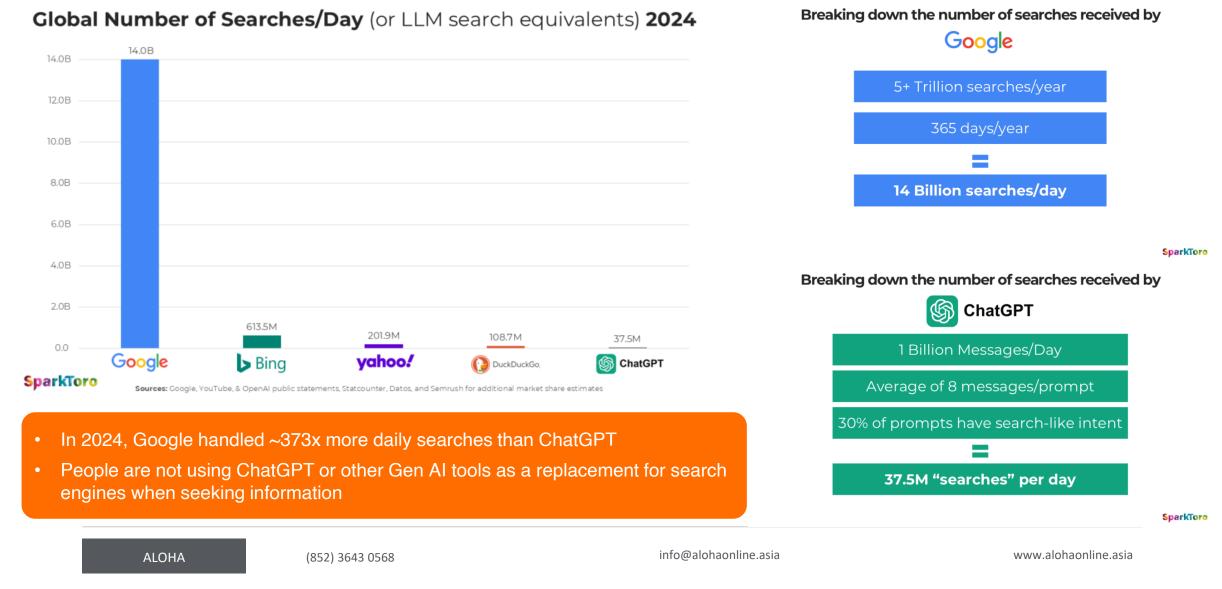
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Source: https://datos.live/blog/chatgpt-search-by-the-numbers-how-is-it-performing-in-the-search-space/

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Gen Al's Impact on Search Engine

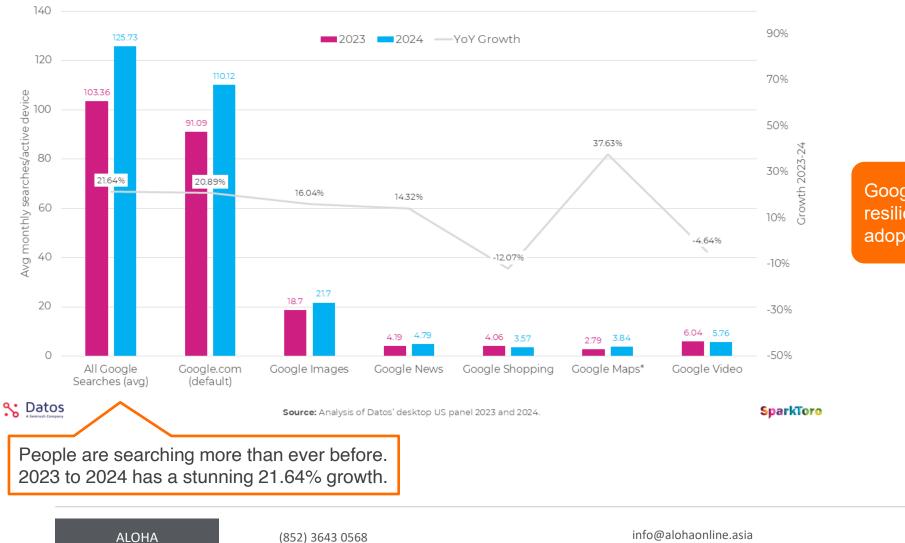
Soaring User Growth but Limited Use for Information Retrieval



Source: https://sparktoro.com/blog/new-research-google-search-grew-20-in-2024-receives-373x-more-searches-than-chatgpt/



Google's Growth Continues during 2023 - 2024



Google continues to grow, showing resilience amid increasing Gen Al adoption

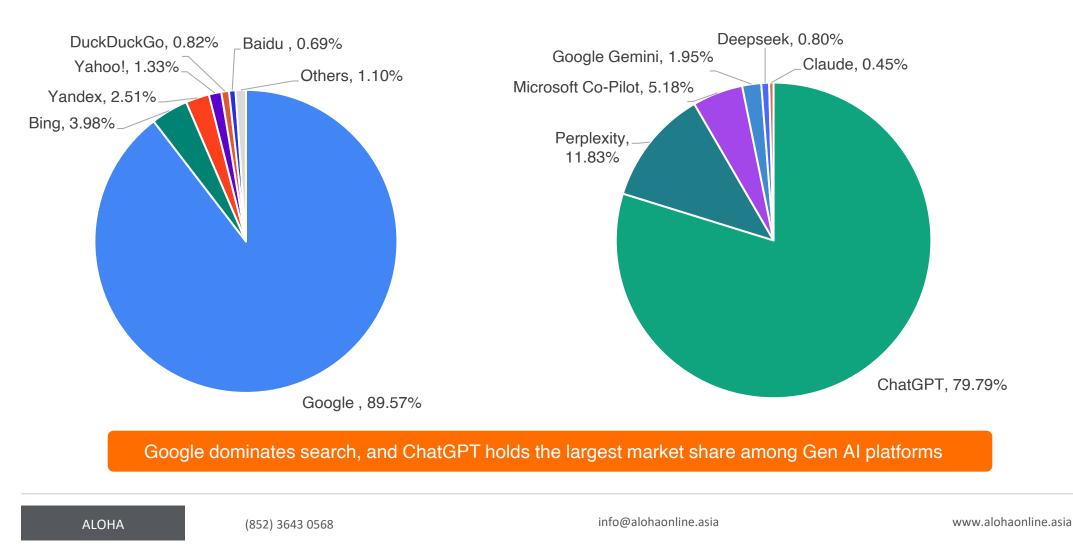
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Search Engine & GEN Al Global Market Share

Search Engine Global Market Share - May 2025

Al Chatbot Global Market Share - May 2025



Google Remains Dominant Across All Aspects

Metric	gemini.google.com	chatgpt.com	google.com
Monthly visits	527.7M	5.492B	83.79B 🙅
Monthly unique visitors	108.2M	411.4M	3.190B 🍨
Q Visits / Unique visitors	4.88	13.35	26.26 🙅
L Visit duration	00:05:43	00:07:12	00:10:22 🙅
Pages per visit	3.59	4.06	8.82 🙅
∑ Bounce rate	32.47%	30.15%	26.87% 👳
Page Views	1.894B	22.28B	739.1B 🙅

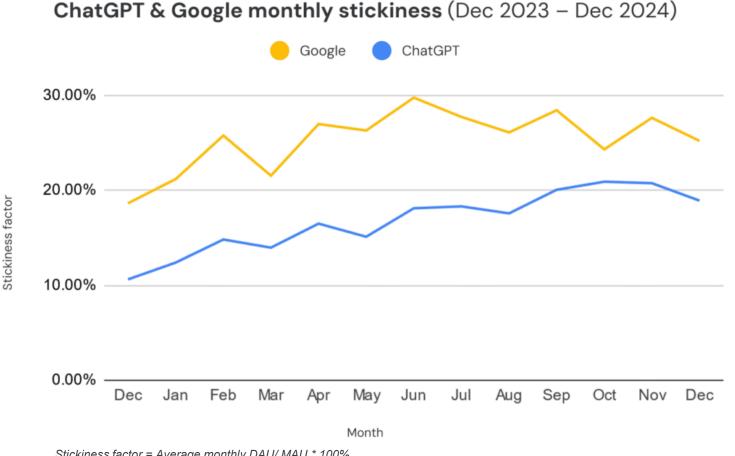
- Google receives over 15× more monthly visits than ChatGPT and over 158× more than Gemini
- Its monthly unique users are also significantly higher $-7 \times$ more than ChatGPT and 29 \times more than Gemini
- Users spend more time on Google overall, although chatbots typically involve more back-and-forth interactions

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ChatGPT vs. O O O O Google

ChatGPT Gaining Traction (US) – Monthly Stickiness



- Google still leads in user stickiness, with a higher DAU/MAU ratio (25.35%) compared to ChatGPT (16.78%)
- ChatGPT is gaining traction quickly, with steady growth in daily usage throughout 2024
- Stickiness for ChatGPT has increased faster, rising from 6.56% to 8.29%, signaling growing user integration into daily routines

Stickiness factor = Average monthly DAU/ MAU * 100%

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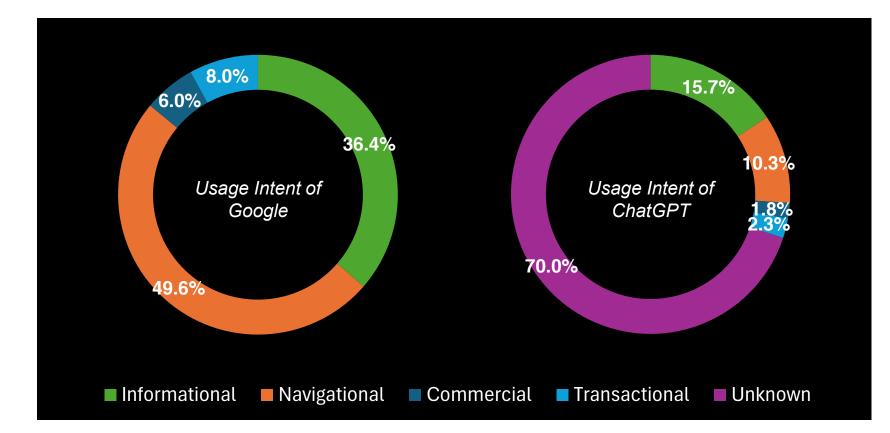
Google's Internal Memo Hints AI Emphasis

High level takeaways

- Lots of interest from Liz Reid, Nick Fox, Vidhya, etc about quantifying Gemini adoption's impact to Search and Ads. They specifically asked about the results of the Assistant Upgrade LE, which I punted but promised to share early next week.
 - They generally do care about ChatGPT's impact to Search and Ads too
 - Nick's main point: "we have 3 options: (1) Search doesn't erode, (2) we lose Search traffic to Gemini, (3) we lose Search traffic to ChatGPT. (1) is preferred but the worst case is (3) so we should support (2)"
 - Vidhya essentially said that analysis keeps telling them we aren't losing Search/Ads traffic yet, but she feels like this is inevitable, and we should prepare for Gemini's success. She wants to accelerate monetizing Gemini with Ads ASAP... "writing is on the wall"
- Discussion on use cases in Gemini led to lots of questions around Gemini monetization strategy
 - Desire from Vidhya, Shashi, and others to more explicitly come up with a connected strategy, e.g. thinking about when Gemini should kick back to Search, build out Shopping solutions, etc
 - Maria mentioned and pinged after about exploring opportunities to build in Shopping experiences in the Gemini user experience more explicitly

- While the narrative may not be fully factual, if Google's internal leadership sees it as a risk, we must objectively acknowledge the behavioral shift
- Rising concern about ChatGPT stealing Search traffic—leaders see this as inevitable and are pushing to monetize Gemini faster
- Search engines aren't going away—but change is inevitable, whether driven by external platforms or initiated by Google itself

ChatGPT Usage Intent is Largely Unknown



Google users are taskoriented, with strong navigational and informational intent

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 ChatGPT usage is 70% unknown, likely driven by non-search tasks such as image generation, summarization, coding, and content creation

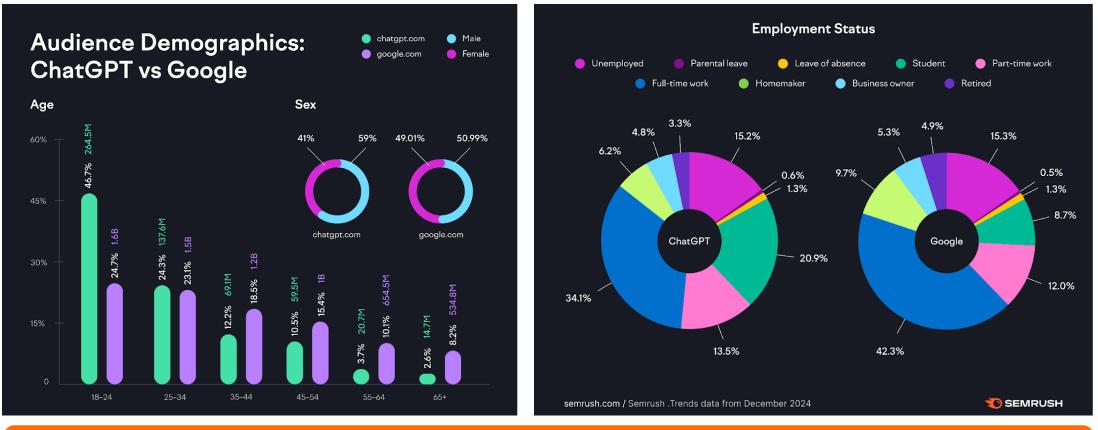
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Demographic: ChatGPT Attracts Younger Audience



- ChatGPT skews younger: 46.7% of its users are aged 18 24
- Google has a stronger presence among mature users: 18.3% are aged 55 and above
- Students make up a larger share of ChatGPT users: 20.9% vs. 8.7% on Google

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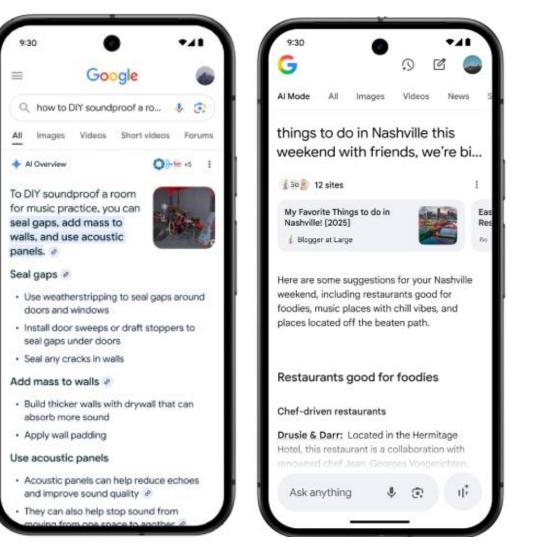
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Google's Al Overview: Changing How We Search



Google's Introduction of AI Overview and AI Mode



What are they?

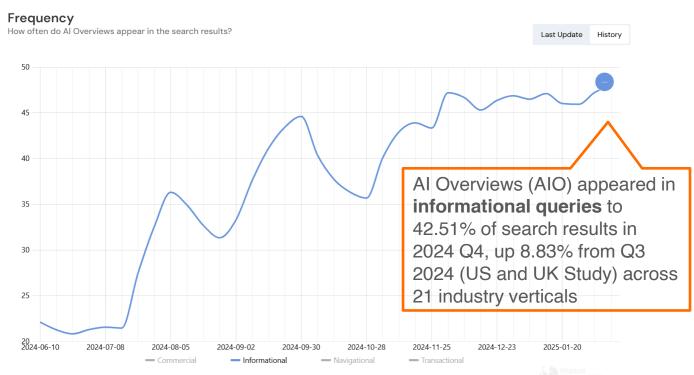
- Al Overview generates a concise, Al-powered summary at the top of a search results page, directly answering the query using information pulled from the web
- AI Mode While not always labeled "AI Mode" publicly, it refers to when a Google product (like Search or Android's Gemini Assistant) switches into a more conversational, assistant-style interaction, powered by large language models like Gemini 1.5

Current Availability

- Al Overview available in over 200 markets and more than 40 languages (Hong Kong included since May 20, 2025)
- AI Overview support added to Chinese, Arabic and more as of May 20, 2025
- AI Mode is currently available in English to users 18 and over in USA
- As of June 2025, AI Overviews and AI Mode data are included in overall search traffic in Google Search Console – data will not be separated from web search

Source: https://blog.google/products/search/ai-overview-expansion-may-2025-update/, https://developers.google.com/search/docs/appearance/ai-features, https://blog.google/products/search/google-search-ai-mode-update/, https://support.google.com/websearch/answer/16011537?hl=en&co=GENIE.Platform%3DAndroid

March 2025 Advanced Web Rankings Presence & CTR Study



- **Informational queries** are ones where users are looking for information or answers to questions. Often include words such as what, when, where, how, etc.
- CTR impact is different across industries, devices and query lengths
- On Desktop main drop is from queries with four or more keywords especially 2nd and 3rd position
- On Mobile 1-word queries saw an increase in CTR for top position

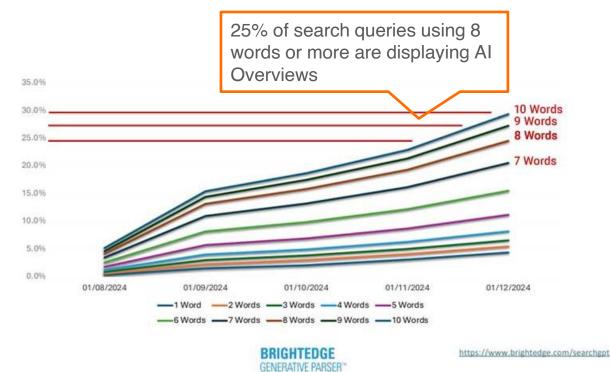
Source: https://www.a	advancedwebranking	a com/bloa/ctr-ac	oale-2024-a4

Industry	Position(s)	CTR cl desktop	nange mobile	Search demand change	
	1st =	-1.87 pp	+1.46 pp		
Careers	2nd	-1.41 pp		+334.36%	
	3rd	-1.06 pp	-		
Shopping	1st	-1.39 pp	-1.96 pp	+142.88%	
	1st	-2.96 pp	-		
Family & Parenting	2nd	-2.12 pp	-1.52 pp	+117.72%	
	3rd	-1.39 pp			
	1st	+5.94 pp	Ð-		
Education	2nd	-2.15 pp	-1.80 pp	+91.51%	
-	3rd	-1.29 pp	-		
Law, Government, & Politics	1st	+7.39 pp	+6.96 pp	+68.66%	
Food & Drink	1st 🔤	Þ	+1.67 pp	+52.32%	
Hobbies & Interests	1st+2nd+3rd	-9.39 pp	-3.78 pp	+48.45%	
	1st	-1.34 pp	-1.54 pp		
Society	2nd	-1.18 pp	-1.11 pp	+29.94%	
-	3rd	-	-1.01 pp		
Sports	1st+2nd	-3.41 pp	25	+26.85%	
Business	+ 1st	+2.27 pp	劃 <u>-</u>	+26.75%	
Style & Fashion	1st	+3.57 pp	+1.70 pp	+26.05%	
Automotive	1st+2nd+3rd	-6.34 pp	-	+18.44%	
Personal Finance	1st+2nd	-6.32 pp	-5.97 pp	+17.79%	
Pets	1st		+3.66 pp	+9.89%	
Travel	1st	-	+1.66 pp	+5.64%	
Real Estate	1st+2nd	-6.24 pp	-3.91 pp	+3.00%	

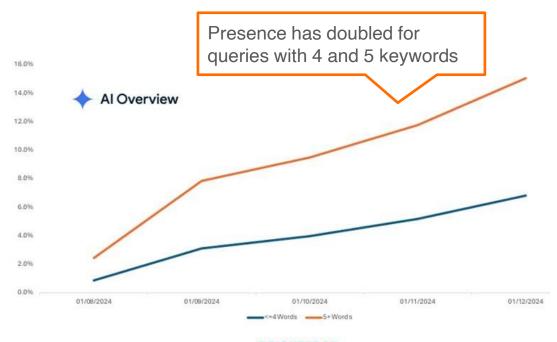


January 2025 BrightEdge – Presence Study

Al Presence Growth is more evident for long-tail queries



Presence for queries with 4 and 5 keywords has grown significantly

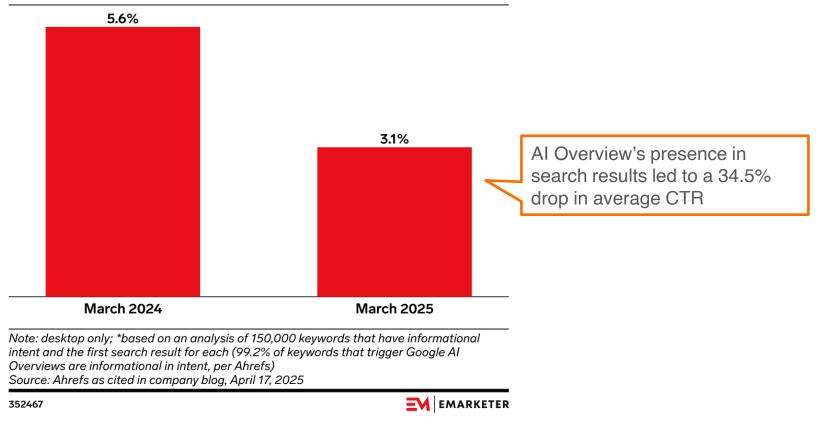




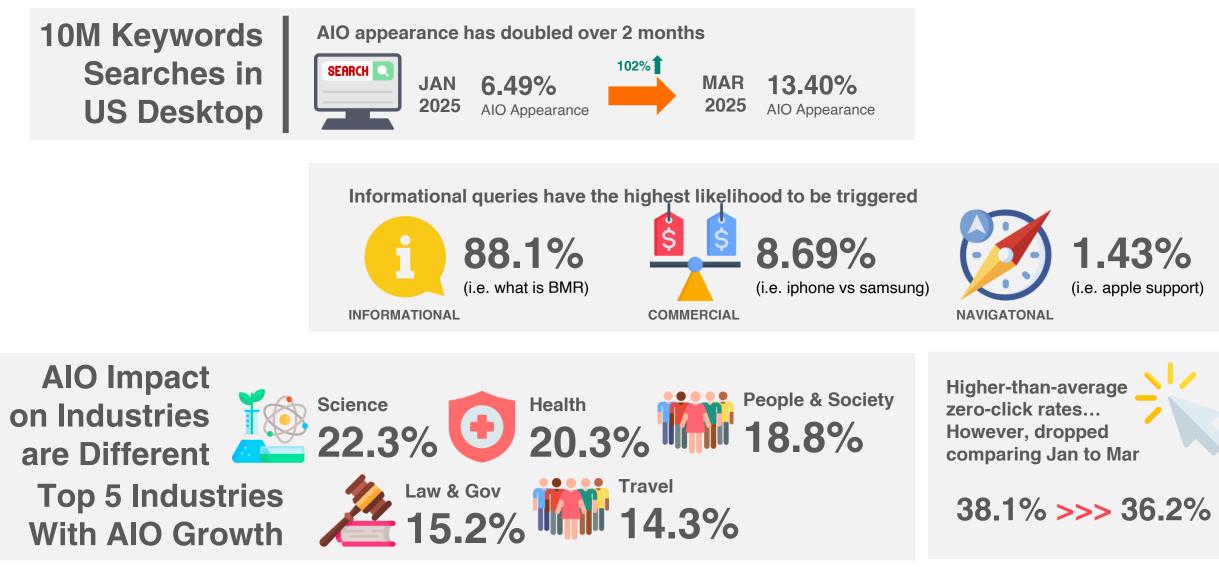
April 2025 Ahrefs Presence & CTR Study

Google Search CTRs of Top Pages Have Fallen Since AI Overviews' Launch in May 2024

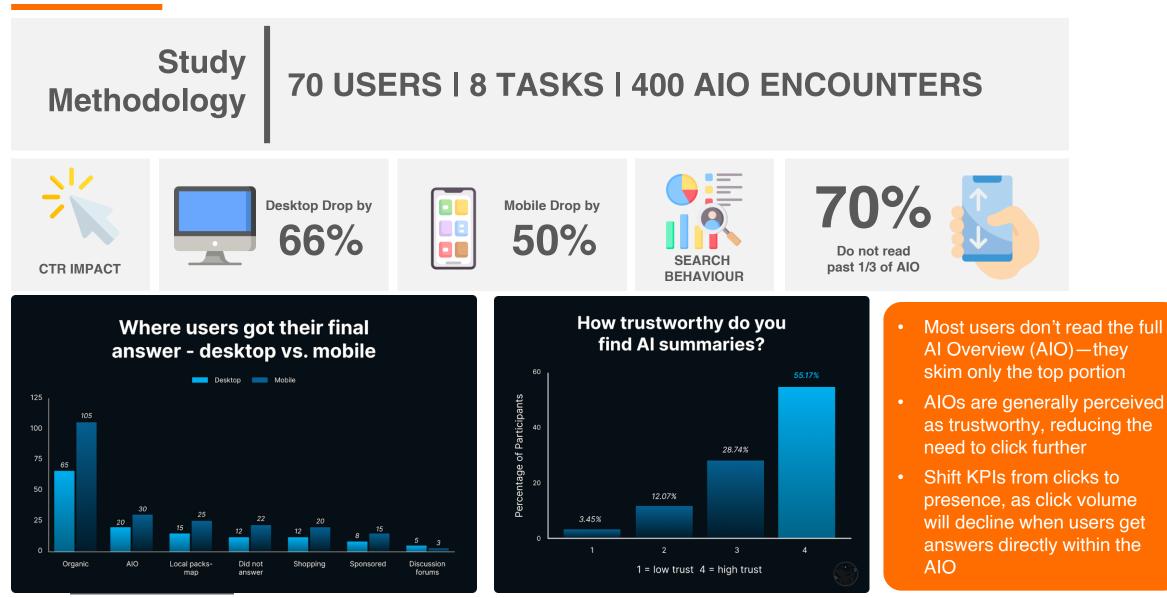
average clickthrough rate (CTR) worldwide of top-ranking Google Search results*, March 2024 & March 2025



May 2025 Semrush & Datos Presence & CTR Study



Growth Memo Presence & CTR Study



Source: https://www.growth-memo.com/p/the-first-ever-ux-study-of-googles, https://searchengineland.com/google-ai-overviews-user-behavior-study-455511

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Summary and Recommendations



Key Takeaways

- 1. Google Search remains a major traffic source it continues to be the dominant platform
- 2. Al adoption is rising while market share is still small, the user base is growing rapidly
- 3. Al adoption is highest among younger users particularly students aged 18 24
- 4. ChatGPT is the leading early mover currently holds a significant lead in market share
- 5. All has the greatest impact on informational queries a large share of Al interactions fall into this category
- 6. Google will evolve features like AI Overview will reshape how SEO operates
- 7. Behavior will shift with search engine changes AI Overview is expected to reduce CTR and click-through volume
- 8. Old KPIs must evolve focus on terms where AI content appears and emphasize visibility over clicks
- 9. Trial and error is essential there's no proven playbook; **prioritize optimizing relevant content** pages over lowengagement pages (e.g., homepage)





Adoption Best Practice

Official Google Documentation – SEO Best Practices:

- 1. Ensure **crawling is allowed** via robots.txt and any CDN (Content Delivery Network) or hosting infrastructure
- 2. Make content easily discoverable through internal links within your website
- 3. Provide a strong page **experience** for users
- 4. Ensure important content is available in textual form
- 5. Support textual content with high-quality images and videos, when applicable
- 6. Ensure your structured data matches the visible text on the page
- 7. Keep your Merchant Center and Business Profile information up to date

https://developers.google.com/search/docs/appearance/ai-features





Adoption Best Practice: Other Points to Consider

- 1. Identify AIO-triggering terms via API-based tracking no direct method exists
- 2. Consider **language-specific differences** e.g., Chinese keywords were only recently supported, and triggers may vary by language
- 3. Align with query intent answer clearly and directly to increase AI pickup
- 4. Use proven content formats such as How-Tos, Comparisons, Top 10s, and Guides
- 5. Add unique value include proprietary data, expert quotes, and timely insights
- 6. Structure for AI readability use clear headings, bullet points, tables, and FAQs
- 7. Be concise and intent-aligned avoid fluff; use precise, relevant terms
- 8. Optimize rich media add descriptive alt text to images and transcripts to videos
- 9. Build off-site authority earn mentions and backlinks from high-authority platforms

https://www.wordstream.com/blog/ai-overviews-impact-on-seo, https://searchengineland.com/google-ai-mode-actionable-tips-456897, https://www.tryprofound.com/guides/answer-engine-optimization-aeo-guide-for-marketers-2025

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Understanding Generative Engine Optimization (GEO)

Gemini & ChatGPT Comparison

The following are some key similarities and differences between Gemini and ChatGPT

Focus Area	Gemini	ChatGPT
Data Handling	Naturally understand and work with many types of content like text, pictures, code, sound, and video — all within one system. It also connects smoothly with Google tools like Calendar, Docs, Sheets, and Gmail	Uses different systems to handle various types of input (like text and images) and then generates the results. This setup helps ChatGPT produce detailed, high-quality writing and creative content, and it offers many ways to customize what you get
Real-Time Information Access	Web-connected—uses Google's vast database, including web pages and internal data	With the new web search feature, ChatGPT can access and incorporate real-time information
Integration	Built into Google Workspace (Docs, Gmail, etc.) and other Google Cloud products	Works with Microsoft products (Copilot), Slack, Zapier, Notion, and other third-party apps
Search Integration	Google Search to get up-to-date information	ChatGPT Search to fetch real-time data (now, available for ChatGPT Plus and Team subscribers; limited for a free plan)

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By using the Gen AI platform SDKs, we can analyze how Gen AI interprets and responds to users' queries

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Example 1: Searching for Details of an Individual

gemini_response = gemini_get_response_web_search(
 google_api_key = gemini_api_key,
 prompt = "aloha seo general manager",
 model = "gemini-2.5-flash-preview-05-20"

```
openai_response = openai_get_responses_reasons(
    openai_api_key=openai_api_key,
    prompt="aloha seo general manager",
    model="o4-mini",
    city="Hong Kong"
)
```

Gen Al at test:

- Gemini Flash 2.5
- ChatGPT/OpenAl

Prompt:

 Aloha SEO General Manager 🙆 АСОНА ——

Example 1: Providing Details on an Individual

The General Manager of Aloha SEO is Ivan Leung. He is also a Co-Founder of Aloha Group Limited, a Hong Kong-based SEO and digital marketing technology company with offices in Hong Kong and Taipei.

Ivan Leung has been instrumental in Aloha's development of proprietary SaaS SEO technology platforms and has steered the company to join the Leading Enterprises Acceleration Programme (LEAP), a program for high-potential tech start-ups by HKSTP.

He has also commented on the company's efforts to make SEO tools approachable for marketers, understanding the bridge between IT and marketing. Aloha, founded in 2016, aims to help clients establish their organic search digital foundation and expand their digital reach using search data and insights 🖾 асона 🗕



Example 1: Behind the Scenes (Gemini Flash 2.5)

<pre>Penderber_content: csystewn.container (in arightight.entropyn content-mailty acquest space and space</pre>

Aloha SEO General Manager

Gemini Flash 2.5 Performed a Google Search



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 \leftarrow C (O https://www.google.com/search?q=Aloha+SEO+General+Manager&client=app-vertex-grou... O

News Videos Short videos Forums Shopping More -

Led Aloha's SEO unit to the award utilizing a multi-regional retainer SEO account in the Finance

Aloha is a Hong Kong SEO and digital marketing tech company founded in 2016 by a team of

【轉知】Gear up for the future! 3月25日線上講座 - 國際事務處

During the weekend, our General Manager Ivan Leung was at # ... During the weekend, our General Manager Ivan Leung was at #HKUSPACE to share about #SEO and

Ivan Leung, General Manager of Aloha a Trailblazing SEO and Digital Marketing Start-Up with Offices

passionate digital experts specializing in SEO, data analytics and ... 12

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other digital marketing tactics. While students have gained.

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Aloha SEO General Manager

Google

industry. 🗹

Colliers

LinkedIn · Ivan Leung 780+ followers Ivan Leung - IAB Hong Kong Hong Kong, Hong Kong SAR · IAB Hong Kong

LinkedIn · Aloha Group 1.3K+ followers Aloha Group

All Images × 🌷

Example 1: Behind the Scenes (Gemini Flash 2.5)

<pre>"grounding_supports": [{ "confidence_scores": null, "grounding_chunk_indices": [0, 1], "segment": { "end_index": 195, "end_index": 195, "end_index": 195, "stargenent": { "stargenent: {</pre>	Grounding Chuck Used: #0 & #1	<pre>"grounding_chunks": [{ "retrieved_context": null, "web": { "domain": null, "title": "hkbu.edu.hk", "uri": "https://vertexaisearch.cloud.google.co AUZIYQG6pDxuE09Vx5DhDWGYIYHj29TzN11KtIt7UeyD10 1ypGrtsPvCiL0x95qcDhWsC_cv5PrEe-tfzbFE4YMNnsI</pre>
<pre>"confidence_scores": null, "grounding_chunk_indices": [0], "segment": { "end_index": 442, "part_index": 198, "tart_index": 198, "text": "Ivan Leung has been instrumental in Aloha's development of proprietary SaaS SEO technology platforms and has steered the company to join the Leading Er tech start-ups by HKSTP" }</pre>	Grounding Chuck Used: #0	<pre>} }, { "retrieved_context": null, "web": { "domain": null, "</pre>
	Grounding Chuck Used: #2	<pre>"title": "iabhongkong.com", "uri": "https://vertexaisearch.cloud.google.co AUZIYQEkMnpOvbY0jSjRvVa-KAGxrlUrQaA2YxC9Kov3 } }, { "retrieved_context": null,</pre>
<pre>}; { confidence_scores": null, "grounding_chunk_indices": [1], "segment": { "end_index": 744, "end_index": 744, "starget_index": 588, "starget_index": 588, "starget_index": 588, "starget_index": "Aloha, founded in 2016, aims to help clients establish their organic search digital foundation and expand their digital reach using search data and ins }</pre>	Grounding Chuck Used: #1	<pre>2 - "web": { "domain": null, "title": "marketing-interactive.com", "uri": "https://vertexaisearch.cloud.google.co AUZIYQFt0oXZ7s0R5QsJLlpQ7XZDFxlj-b6EXiAiUk0jFk } }</pre>

- The final response is composed of multiple smaller answers
- Each "Grounding Chunk" containing supporting content and its source

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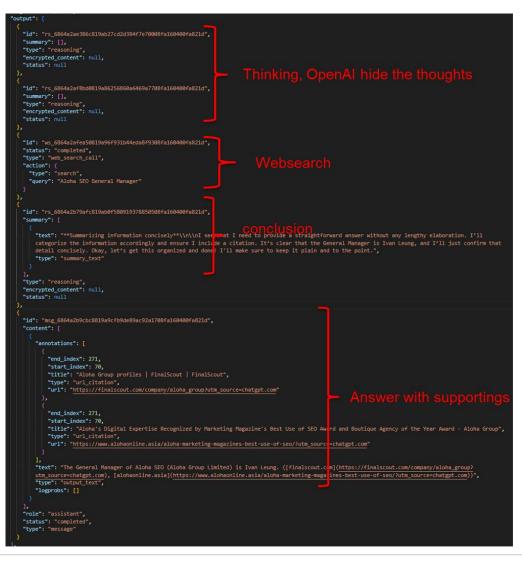
Example 1: Behind the Scenes - Ranking of the Supporting (Gemini Flash 2.5)



Example 1: Behind the Scenes (ChatGPT/OpenAl)

ChatGPT/OpenAl

 followed a similar chain of reasoning



Example 2: Asking a Time-sensitive Question

gemini_response = gemini_get_response_web_search(
 google_api_key = gemini_api_key,
 prompt = "2025 Fifa Club World Cup Winner",
 model = "gemini-2.5-flash-preview-05-20"

```
openai_response = openai_get_responses_reasons(
    openai_api_key=openai_api_key,
    prompt="2025 Fifa Club World Cup Winner",
    model="o4-mini",
    city="Hong Kong"
```

Gen Al at test:

- Gemini Flash 2.5
- ChatGPT/OpenAl

Prompt:

2025 Fifa Club
 World Cup Winner

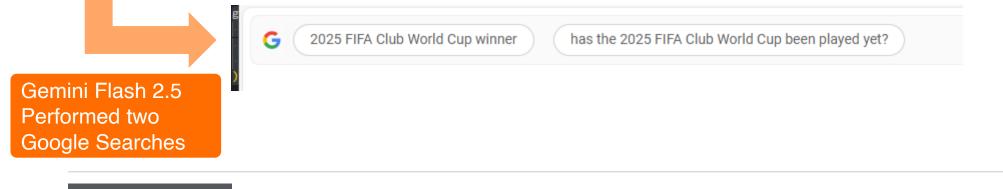


Example 2: Answering a Time-sensitive Question

The 2025 FIFA Club World Cup winner has not yet been determined, as the tournament is currently in progress. The competition commenced on June 14, 2025, and is scheduled to conclude on July 13, 2025, in the United States

Example 2: Behind the Scenes (Gemini Flash 2.5)

"search_entry_point": {
11 0 4.02.75 5.52 1.9814.36-4.36C31.22 9.43 27.81 8 24 8c-5.93 0-11.01 3.4-13.45 8.3615.03 3.85A8.86 8.86
0 1 24 14.14z\" fill=\"#EA4335\"/>\n \n <div class='\"gradient-container\"'><div< td=""></div<></div>
<pre>class=\"gradient\">\n \n <div class='\"carousel\"'>\n <a class='\"chip\"' href='\"https:</pre'></div></pre>
vertexaisearch.cloud.google.com/grounding-api-redirect/
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google.com/grounding-api-redirect/
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AByNidJ2R1S8KgJx06UBUqfVTwlhjgQHvBwKHngtdvFPW0quUqhCmgzaUaTUqUXfwvmvqa4ohSoJE24fLImGV6qAppYCoz6psZPUSXrBr1
ui0Q7NcttZXWsfa9VdMXLjVMKg_RyraVNwE=\">has the 2025 FIFA Club World Cup been played yet?\n \n </td

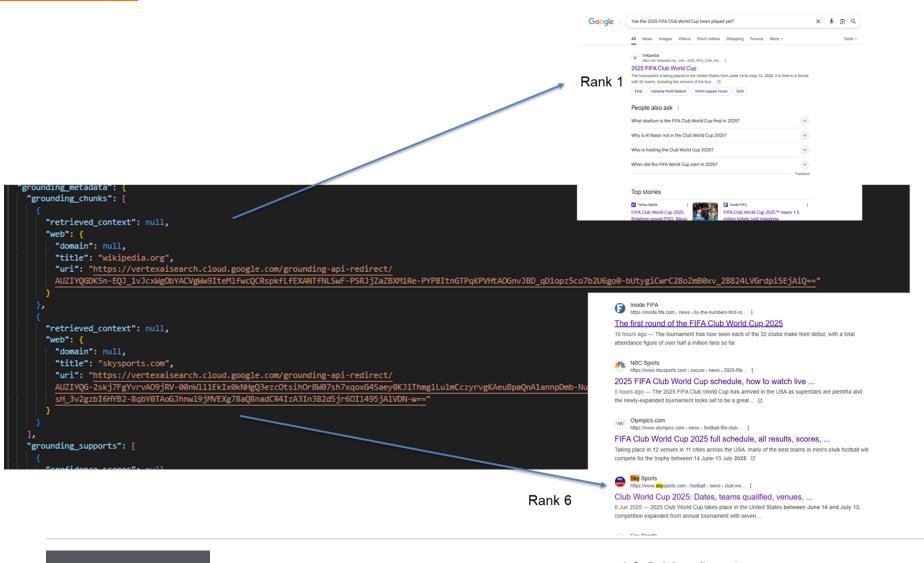


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Example 2: Behind the Scenes (Gemini Flash 2.5)

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"grounding_chunk_indices": [
0,	
1	
J, "segment": {	
"end_index": 220,	
"part_index": null,	
"start_index": 109,	
"text": "The competition commenced on June 14, 2025, and is scheduled to conclude on July 13, 2025, in the Unite	d States"
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Example 2: Behind the Scenes - Ranking of the Supporting (Gemini Flash 2.5)



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Example 2: Behind the Scenes (ChatGPT/OpenAI)

Step 1: Understanding the question

• The LLM recognized that the tournament ends in July, and yet to have the winner. OpenAI decided to confirm the date





Example 2: Behind the Scenes (ChatGPT/OpenAl)

"id": "ws 6864a37548648198a7ae984ad79a00ce08bb7e87b79ea9c7", "status": "completed", "type": "web search call", "action": { "type": "search", "query": "2025 FIFA Club World Cup final date"

Step 2: Finding supporting information

 The LLM did a web search with the query "2025 FIFA Club World Cup Final date" to confirm its first thought (search engine is unknown)

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Example 2: Behind the Scenes (ChatGPT/OpenAl)

"id": "rs_6864a38b0b1c81989ae9b282dc76419108bb7e87b79ea9c7", "summary": [

"text": "**Clarifying the FIFA Club World Cup**\\n\\nThe Wikipedia page doesn't list a winner for the FIFA Club World Cup final because it's scheduled for July 13, 2025, which is still in the future. Since it's happening after July 2, no winner is known yet. The user likely expects past results, but I need to clarify that the tournament is ongoing from June 14 to July 13, 2025, and the final will take place on that date at MetLife Stadium. If the user is confused about the timeline, I can help clarify that too.",

"type": "summary_text"

"text": "**Summarizing the FIFA Club World Cup**\\n\\nThe tournament runs from June 14 to July 13, 2025, with the final set for July 13 at MetLife Stadium. As of July 2, there is no winner because the tournament is still ongoing. The user might expect results, but the final has not yet occurred. If they were thinking of the 2023 winner, that's not applicable either. I'll clarify that the winner will be determined after the final and include important details and sources in my response.",

"type": "summary_text"

"type": "reasoning", "encrypted_content": null, "status": null

Step 3: Providing the answer

• Using the search results, the LLM confirmed its initial assumption and generated the answer

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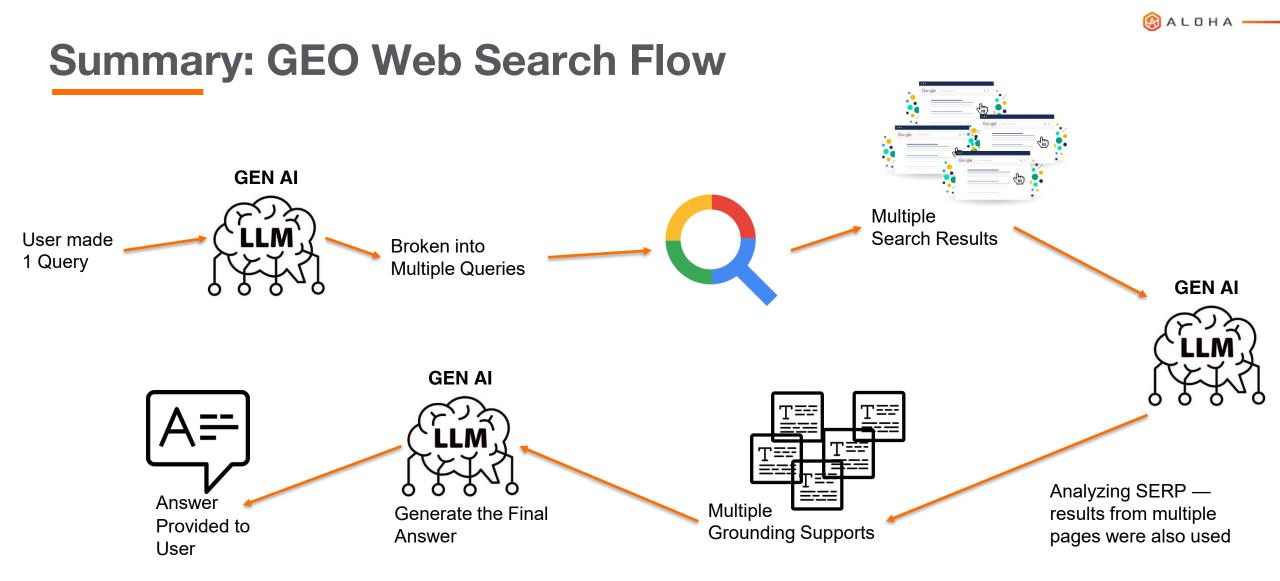
Example 2: Behind the Scenes (ChatGPT/OpenAl)

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Step 4: Answering the question

• Providing a URL citation

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*LLM = Large Language Model (LLM) is a type of artificial intelligence (AI) technology designed to understand, generate, and manipulate human language

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Source: https://searchengineland.com/google-ai-overviews-13-searches-455057



Key Takeaways

- As with traditional SEO, optimizing for related keywords & Topics remains
 essential
- Different AI models use **different search engines** as their knowledge base, so it's important to **optimize across multiple platforms**
- **Titles and meta descriptions may be less influential**, as AI can access and evaluate the full content of search results
- High rankings don't guarantee AI usage **content quality and relevance** are what matter most



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Search Engine for each Al

Al Search Engine	Underlying Search Engine / API	Large Language Model	Notes
ChatGPT	Microsoft Bing Web Search API	ChatGPT (OpenAl LLM)	ChatGPT's live web search is powered by Bing's index and API, providing up-to-date answers with source citations. This integration started in 2023 and is now broadly available to all users.
Gemini Search	Google Search API	Google Gemini 2.0 Flash	Uses Google's search infrastructure combined with Gemini LLM for real- time AI-powered search and grounded answers.
Perplexity Al	Custom built- in search engine	GPT-4, Claude 3, Mistral, custom models	Performs daily web indexing with multiple LLMs, providing real-time info and citations from its own search index.
Bing	Bing Search Engine	GPT-4 (OpenAl)	Microsoft's Bing integrates GPT-4 to offer conversational AI search, blending traditional search with generative AI responses.

Citation

- <u>https://www.searchenginejournal.com/bing-integrates-with-</u> chatgpt/487638/
- https://blogs.bing.com/search/may_2023/Bing-at-Microsoft-Build-2023
- <u>https://www.thurrott.com/cloud/283485/build-2023-microsoft-announces-bing-search-integration-into-chatgpt</u>
- <u>https://blogs.microsoft.com/blog/2023/02/07/reinventing-search-with-a-new-ai-powered-microsoft-bing-and-edge-your-copilot-for-the-web/</u>
- <u>https://www.cnbc.com/2023/02/07/microsoft-open-ai-chatgpt-event-</u> 2023-live-updates.html

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Thank you!



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