

The evolving landscape of search: SEO in the age of AI

This analysis was prepared by Staffan Lindgren, Group CTO & Chief AI Officer, and Coen van der Heijden, SEO Skill Lead at Comprend.

It brings together industry research and original analysis conducted across 2024 and 2025 to examine the evolving dynamics of search. It draws on data from leading search and SEO platforms, technical infrastructure and security providers, and independent studies analysing the impact of AI Overviews on search behaviour.

Particular emphasis is placed on Q3 2025 data to ensure relevance for strategic planning into 2026.

Introduction

Search is changing. The growing presence of AI-generated answers in Google results and the increasing use of platforms like ChatGPT and Perplexity are reshaping how people access information. These developments are altering the flow of traffic and raising questions about how businesses can stay visible.

While some in the industry frame this as the arrival of entirely new tactics, the reality is that many of the principles being repackaged under new labels are the same ones that have guided effective search strategies for years. Authority, originality, technical soundness, and a focus on meeting user needs remain central.

This article provides context on how the landscape is evolving, what these shifts mean for visibility, and why doubling down on proven fundamentals is the most reliable way forward. Drawing on insights from leading industry sources including SearchEngineLand, Ahrefs, Semrush, as the year draws to a close, we outline what has changed and what continues to matter most in 2025 and into 2026.

Executive summary: Key findings

Rapid expansion of AI Overviews:

- 55% of Google searches now show AI Overviews (up from 18% globally)
- 115% growth since March 2025 in overall coverage
- 58% of Google searches now result in zero clicks

Critical Impact on click-through rates:

Metric	With AI Overviews	Without AI Overviews	Impact
Users clicking website links	8%	15%	-47% decline
Position 1 CTR	2.6%	7.3%	-64% decline
Session ending rate	26%	16%	+63% increase

Industry-specific AI Overview coverage:

Industry	AI Overview Trigger Rate	Conversion Rate Benchmark
Healthcare/Education	~90%	N/A
Relationships	60-62%	N/A
B2B Technology	56-58%	N/A
Food & Beverage	45-48%	7%+
Beauty & Personal Care	N/A	4.82%
E-commerce	2-2.5%	2-5%
Luxury & Jewellery	N/A	~1%

Internet traffic composition:

- 31-51% of all web traffic is now automated (bot traffic)
- 71.5% of visits on some networks come from automated sources
- 93% of bots are unverified and potentially malicious

Critical traffic pattern changes (June 2025):

- 18% global decline in human traffic with increased conversion levels
- Corporate websites maintain steady traffic as AI reference sources
- Domain authority increasingly important for AI citations

June-September 2025 correlation analysis:

- Traffic redistribution rather than simple loss - authority sites protected
- Top 50 domains get 30% of AI Overview mentions - validates corporate site stability
- Three-tier system emerging - authority sites thrive, low-authority sites marginalised

Major Google technical change (September 2025):

- Google limits how ranking tools and bots can retrieve information from Google's index, likely to limit the strain on their resources
- Impression data dropped significantly around September 10, 2025, indicating that much of the data has up until now consisted of bots (e.g. rank trackers and AI platforms like ChatGPT)
- Rank tracking tools are able to provide less visibility data
- May explain part of the "great decoupling" between impressions and clicks

Bot blocking evolution:

- Over 1 billion 402 response codes sent daily by Cloudflare customers
- Companies shifting from blocking to monetising AI bot access
- Amazon blocks major AI bots while others explore licensing models

The role of Generative Engine Optimisation

Acronyms like AEO, GEO, and AIO are often presented as new, but most simply extend the principles of SEO into AI-driven contexts. The fundamentals - clarity, originality, authority, technical accessibility, and relevance - remain the deciding factors for visibility.

What's new is the environment. Search engines now generate answers directly on results pages, and platforms such as ChatGPT and Perplexity are becoming alternative gateways to information. This shifts the challenge from ranking alone to also being cited, referenced, or included in AI-generated responses.

Rather than treating GEO as a separate discipline, it's more accurate to view it as the evolution of SEO. Proven practices focusing on user intent, trustworthy content, and strong site foundations matter more than ever as AI becomes central to how people discover and consume information.

Aspect	Before	Now
Target	Traditional search engines (Google, Bing)	AI platforms (ChatGPT, Google AI Overviews, Perplexity)
End goal	Reach and influence your audience via search	Unchanged
How	Rank high in search results → Earn clicks	Be present, earn clicks and/or get cited
Important metrics	<ul style="list-style-type: none"> • Organic search traffic • Ranking position • Click-through rate 	<ul style="list-style-type: none"> + Mentions in AI platforms and AI search features + Brand sentiment

Doubling down on SEO and marketing principles in an AI-driven landscape

Rather than introducing entirely new tactics, the AI-driven search environment reinforces the importance of longstanding SEO and marketing fundamentals. What changes is the context in which they are applied and the weight they carry within AI-generated results. To remain visible, brands should double down on these proven principles:

- E-E-A-T and the Push for Originality: The concept of Experience, Expertise, Authoritativeness, and Trustworthiness (E-E-A-T) is more critical than ever. With the proliferation of AI-generated content, Google is placing a premium on originality and verifiable authorship. Brands must leverage their own data, customer reviews, and unique insights to create content that stands out. A leaked Google API document even referenced an "OriginalContentScore," underscoring the importance of authentic, human-generated content [\[2\]](#).
- Focus on user intent: The shift from keyword targeting to addressing real user needs has been ongoing for years. In 2025 and beyond, the emphasis on understanding intent is more critical than ever. Doubling down on content that answers actual user needs and interest with clarity and depth ensures alignment with both human users and AI systems.
- Technical SEO remains vital: A strong technical foundation continues to serve both users and bots. This includes optimising for structured data, creating well-organised sitemaps, ensuring clean code, and prioritising accessibility. A Google API leak has also confirmed that clicks and post-click behaviour are used in ranking algorithms, making user experience a direct ranking factor [\[2\]](#).
- Establishing brand and domain authority: Authority has always been a cornerstone of search, but AI-driven systems amplify its importance by leaning more heavily on trusted domains when generating answers. Visibility now depends not only on how a site performs technically, but also on how a brand is positioned and perceived by users, search engines, and large language models. Doubling down on brand reputation, consistency, and credibility ensures stronger inclusion and placement within AI-generated responses [\[1\]](#).

The impact of Google's AI Overviews

Google's AI Overviews, formerly known as Search Generative Experience (SGE), are having a profound impact on website traffic and user behaviour. These AI-powered summaries, which appear at the top of the search results page, are changing the way users interact with search.

Traffic and click-through rates

The data on AI Overviews' impact on click-through rates is striking and consistent across multiple studies. The most recent data from September 2025 shows the trend is accelerating. According to the latest WordStream analysis, AI Overviews now show for 55% of Google searches, representing significant growth from earlier measurements [\[14\]](#). This dramatic expansion represents a fundamental change in how users interact with search results.

Latest click-through rate impact data (September 2025):

Metric	With AI Overviews	Without AI Overviews	Impact
Users clicking website links	8%	15%	-47% decline
Position 1 CTR	2.6%	7.3%	-64% decline
Session ending rate	26%	16%	+63% increase
Overall CTR decline	-	-	34.5% average

Multiple independent studies confirm this accelerating trend. Ahrefs' analysis of 300,000 keywords found that AI Overviews reduce clicks to websites by 34.5%, with 99.2% of keywords showing CTR decline when AI Overviews appeared [\[3\]](#).

The latest DemandSage research shows that organic CTR fell by 34.5% when AI Overviews appeared, with the position 1 ranking site's CTR dropping from 7.3% to 2.6% [\[15\]](#). Most significantly, 58% of Google searches now result in zero clicks, indicating a massive shift toward answer consumption directly within Google [\[14\]](#).

However, the story is not entirely negative. While the quantity of traffic may be decreasing, the quality of the traffic that does reach websites appears to be higher. Google's own documentation states that when people click from search results pages with AI Overviews, these clicks are higher quality, meaning users are more likely to spend more time on the site [\[5\]](#). This suggests that users who click through are more qualified and have a stronger intent to engage with the content.

Industry-specific impact

The impact of AI Overviews varies significantly by industry, with the latest September 2025 data revealing clear patterns in coverage and user behaviour.

AI Overview trigger rates by industry (September 2025):

Industry	AI Overview Trigger Rate	Change from 2024
Healthcare	~90%	Approaching saturation
Education	~90%	Approaching saturation
Relationships	60.54% - 62.38%	New category leader
B2B Technology	56.38% - 57.52%	Growth from 36% to 70%
Insurance	48.70% - 51.86%	Growth from 17% to 63%
Food and Beverage	45.62% - 47.66%	Moderate coverage
News and Politics	3.76% - 4.50%	Low coverage
E-commerce	2.14% - 2.48%	Declined from 29% to 4%
Fashion and Beauty	1.34% - 1.46%	Minimal coverage

The data shows that Google is most aggressive with AI Overviews for informational queries (healthcare, education, relationships) while remaining cautious about transactional queries (e-commerce, fashion). This suggests Google is prioritising user education and information discovery over commercial intent preservation [\[8\]\[15\]](#).

Conversion rates and user behaviour

The impact on conversion rates reveals a nuanced picture that challenges traditional assumptions about traffic volume and business success. Conductor's analysis revealed that despite significant traffic drops of up to 60% on some pages, conversions only fell slightly [4]. This aligns with the idea that the traffic reaching websites is more qualified and has higher intent.

Furthermore, Ahrefs' data shows that for their own site, AI search visitors convert 23x better than traditional organic search visitors [3]. This highlights the potential for higher conversion rates from the more targeted traffic that comes from AI-driven search. The data suggests a fundamental shift from quantity-based to quality-based traffic metrics.

Recent Google technical changes (September 2025)

A significant development occurred in September 2025 that has major implications for SEO tracking and analysis. Google disabled the `&num=100` URL parameter around September 10, 2025, which previously allowed SEO tools to retrieve 100 search results in a single request [16]. This change has several important implications:

Impact on SEO Industry:

- Google limited how ranking tools and bots can retrieve information from Google's index, likely to limit the strain on their resources
- Many rank-tracking tools experienced disruptions, missing rankings, or error states
- Desktop impressions in Google Search Console dropped significantly around September 10
- The change may explain part of the "great decoupling" between impressions and clicks

Theory on Impression Inflation: Industry experts suggest that previous desktop impression spikes may have been artificially inflated by bots from SEO and AI analytics tools loading pages with 100 results, which would register many more impressions than normal 10-result pages. This technical change forces a re-evaluation of historical traffic data and may provide a more accurate baseline for future measurements [16].

Understanding internet traffic: Human vs. automated activity

A critical aspect of analysing current traffic trends is understanding the composition of internet traffic itself. The 17% growth in worldwide internet traffic reported by Cloudflare includes both human and automated traffic, with bot activity representing an increasingly significant portion of overall web activity.

The rise of bot traffic

Recent data reveals a dramatic shift in the composition of internet traffic. According to Cloudflare's Application Security Report, 31.2% of all application traffic processed by their network is bot traffic, a percentage that has remained relatively consistent at around 30% over the past three years [\[11\]](#). However, other studies suggest the proportion may be even higher and growing rapidly.

The 2025 Imperva Bad Bot Report marks a significant milestone: for the first time in a decade, automated traffic has surpassed human activity, accounting for 51% of all web traffic in 2024 [\[12\]](#). This trend is accelerating, with some networks reporting even higher percentages. DreamHost's network data shows that 71.5% of visits come from automated sources, meaning robots now outnumber humans 3 to 1 on the internet [\[13\]](#).

AI bots and agentic traffic

The growth in bot traffic is increasingly driven by AI systems. Cloudflare's data shows significant increases in AI bot and crawler activity throughout 2024, with bots voraciously consuming content to train ever-evolving AI models. The top AI bots tracked include Bytespider, ClaudeBot, GPTBot, OAI-SearchBot, and PerplexityBot, all showing varying levels of activity throughout the year [\[6\]](#).

This AI-driven bot traffic represents a new category of "agentic traffic" - automated systems acting on behalf of AI platforms to gather, process, and understand web content. Unlike traditional web crawlers that simply index content, these AI bots are actively learning from and synthesizing information for use in generative AI responses.

Quality and intent of bot traffic

Not all bot traffic is created equal. Cloudflare's analysis reveals that 93% of bots they identified were unverified and potentially malicious, while only 7% were verified legitimate bots such as search engine crawlers [\[11\]](#). The Imperva report indicates that 37% of all bot traffic is malicious, designed for harmful purposes such as DDoS attacks, credential stuffing, or inventory hoarding [\[12\]](#).

Traffic and conversion rate analysis

Understanding these traffic composition changes provides crucial context for analysing performance metrics:

- Global traffic growth context: Cloudflare's reported 17% growth in worldwide internet traffic includes both human and automated activity. Given that bot traffic represents 31-51% of all traffic and is growing rapidly, a significant portion of this growth is likely attributable to increased automated activity, particularly from AI systems [\[6\]](#).
- Page speed and conversions: Page speed remains a critical factor for both user experience and conversion rates. A B2B site that loads in 1 second has a conversion rate 3 times higher than a site that loads in 5 seconds. Furthermore, 53% of people will leave a page if it takes longer than 3 seconds to load on their mobile device [\[7\]](#).
- AI vs. traditional search traffic: While AI-driven search is growing rapidly, traditional search still dominates human-directed traffic. Google sends 345x more traffic to websites than ChatGPT, Gemini, and Perplexity combined. However, AI traffic has increased 9.7x in the past year, and now accounts for 0.1% of web referral traffic [\[3\]](#).

Critical traffic pattern changes (June 2025)

Recent data from June 2025 reveals significant shifts in traffic patterns that provide crucial context for understanding the current search landscape:

Human traffic decline with conversion Improvement:

- 18% global decline in human traffic (measured as page views by humans, though bots acting as humans in browsers likely included)
- Increased conversion levels despite the traffic decline
- This pattern suggests that while overall traffic volume is decreasing, the quality and intent of remaining traffic is improving

Corporate websites as AI reference sources:

- Traffic remains steady to "corporate websites" indicating they function as references for AI systems
- Corporate sites serve as authoritative sources when AI services provide transparent sourcing
- Domain authority increasingly important as AI systems preferentially cite established, credible sources
- Brand recognition and trust becoming key factors in AI citation patterns

This data supports the growing importance of domain authority over individual page authority, as AI systems appear to favour content from established, trustworthy domains when generating responses and citations.

Correlation analysis: June vs. September 2025 findings

The June 2025 traffic decline data provides crucial context for understanding the September 2025 AI Overviews impact data. When analysed together, these datasets reveal a clear pattern of traffic redistribution rather than simple traffic loss.

Traffic decline correlation:

Metric	June 2025	September 2025	Correlation
Human traffic decline	18% global decline	34.5% CTR decline with AI Overviews	Accelerating trend
Conversion rates	Increased despite decline	23x better for AI search visitors	Quality over quantity confirmed
Corporate website traffic	Remained steady	Top 50 domains get 30% of AIO mentions	Authority sites protected
Zero-click searches	Not measured	58% of searches result in zero clicks	Explains traffic destination

The corporate website protection effect:

The June 2025 finding that "traffic remains steady to corporate websites" is now validated by September 2025 data showing:

- The top 50 domains on Google get nearly 30% of all AI Overview mentions [\[14\]](#)
- 40% of sources shown in AI Overviews would rank in spots 11-20 rather than the top 10 [\[14\]](#)
- Google appears as a source in nearly 44% of all AI-generated Overview answers [\[14\]](#)

This suggests that while overall traffic declines, established corporate domains are being preferentially cited and protected in the AI-driven search ecosystem.

Domain authority validation:

The correlation between June and September data strongly supports the shift toward domain authority:

- 1 June 2025: Corporate websites maintain steady traffic as AI reference sources
- 2 September 2025: Top domains receive disproportionate AI Overview citations
- 3 Implication: AI systems are creating a "citation aristocracy" favouring established brands

The quality traffic hypothesis:

The June 2025 observation of "increased conversion levels despite traffic decline" is now explained by September 2025 findings:

- AI search visitors convert 23x better than traditional organic search visitors [\[3\]](#)
- Only 8% of users click website links when AI summaries are present, but these are highly qualified clicks [\[15\]](#)
- Users who click from AI Overviews spend more time on sites according to Google [\[5\]](#)

Traffic redistribution pattern:

The data suggests a three-tier redistribution:

- 1 Tier 1 (corporate/authority sites): Maintain or increase traffic through AI citations and high-quality referrals
- 2 Tier 2 (mid-tier sites): Experience moderate decline but benefit from improved conversion rates
- 3 Tier 3 (low-authority sites): Face significant traffic decline as AI systems bypass them entirely

Strategic implications:

This correlation analysis reveals that the June 2025 "18% decline with increased conversions" was an early indicator of the fundamental shift we're seeing accelerate in September 2025. Companies with strong domain authority are not just surviving but potentially thriving in the AI-driven search landscape, while those without established credibility face increasing marginalisation.

The evolution of bot blocking: from restriction to monetisation

A significant shift is occurring in how companies approach AI bot traffic. Rather than simply blocking all automated access, many organisations are exploring monetisation opportunities and selective access controls.

The shift from binary blocking:

- Over one billion 402 response codes sent daily by Cloudflare customers, indicating widespread desire to communicate with AI crawlers rather than simply block them
- Content creators moving beyond the binary choice of block vs. allow all access
- New HTTP 402 "Payment Required" responses enable licensing negotiations before content access

Major company actions:

- Amazon quietly blocks AI bots from Meta, Google, Huawei, and other major tech companies
- Amazon's stance is notable given that competitors like Walmart and eBay have not implemented similar restrictions
- E-commerce sites becoming more selective about which AI systems can access their product data

Emerging monetisation models:

- Pay-per-crawl systems allowing content creators to automatically monetise AI access
- Custom 402 response messages such as "To access this content, email partnerships@yoursite.com"
- Structured licensing terms communicated directly to AI crawlers through HTTP responses

Market response:

- 20% of websites use Cloudflare for security and traffic management, giving significant leverage over AI bot access
- Publishers including Yahoo, Quora, and Medium implementing new protocols to prevent unauthorised AI copying
- Reddit operates on contractual/paid access model rather than blanket blocking, suggesting commercial viability

This evolution suggests that companies are recognizing the potential value of AI bot traffic while demanding fair compensation and control over how their content is used in AI training and responses [\[19\]](#).

Latest conversion rate benchmarks by industry (September 2025)

Understanding current conversion rate benchmarks is crucial for businesses adapting to the new search landscape.

The latest data from September 2025 reveals significant variations across industries:

E-commerce conversion rates by Industry (2025):

Industry	Conversion Rate	Key Characteristics
Food & Beverage	7%+	Highest converting; low-risk purchases, subscriptions
Beauty & Personal Care	4.82%	Habitual purchases, high loyalty, replenishment cycles
Fashion & Footwear	2-4%	Sizing uncertainty, trend-driven, moderate performance
Pet Care	2-4%	Necessity-driven, veterinary influence, autoship options
Electronics & Appliances	3%+ (accessories)	Wide range; accessories quick, appliances research-heavy
Electronics & Appliances	~2% (big-ticket)	Specification comparisons, warranty considerations
Home & Furniture	1.5-2%	Research-heavy, logistics complexity, fit questions
Luxury & Jewellery	~1%	High-ticket, extended consideration, trust requirements

Global E-commerce average: The overall global average conversion rate falls between 2% and 5%, influenced by factors such as product type, pricing, and shopping experience [\[17\]](#).

Key insights:

- Lower-ticket items (food, beauty) achieve higher conversion rates but lower average order values
- Higher-ticket items (luxury, furniture) have lower conversion rates but higher average order values
- Subscription and auto-ship options significantly improve repeat conversion rates
- AR tools and detailed product information help reduce uncertainty for big purchases [\[17\]](#)

AI Overviews growth and regional data (September 2025)

The expansion of AI Overviews has been rapid and global. The latest data reveals both the scale and regional variations in adoption:

AI Overviews growth metrics:

- 115% growth since March 2025 in overall coverage
- Keyword share doubled since March 2025
- Expanded to 200 countries and 40 languages in May 2025
- 55% of Google searches now show AI Overviews (up from 18% globally)

Regional AI Overview coverage (September 2025):

Region	AI Overview Trigger Rate	Key Characteristics
United States	~28% average	Highest coverage globally; mature rollout
Canada	20-25% estimated	AI Mode launched August 2025
Europe (EU/UK)	15-20% estimated	Cautious rollout due to EU AI Act
Asia	10-15% estimated	Varies by country and language support
South America	5-10% estimated	Limited rollout in major markets

European market impact:

- Organic clicks dropped from 47.1% to 43.5% in EU/UK when AI Overviews present
- 7.6% decline in organic clicks in European markets
- Position 2 often outperforms Position 1 when AI Overviews are present [\[18\]](#)

User demographics and behaviour:

- 81% of AI Overview queries are performed on mobile devices
- 25–34-year-olds use AI Overviews most frequently on mobile
- 50% of the time, AI Overviews serve as the final answer for this demographic
- Queries with 8+ words are 7x more likely to trigger an AI Overview
- 99.2% of keywords triggering AI Overviews have informational intent [\[14\]](#)[\[15\]](#)

Screen real estate impact:

- AI Overviews occupy 42% of desktop screens and 48% of mobile screens
- SERPs with AI Overviews show 96% fewer sitelinks, 84% fewer videos, and 75% fewer knowledge panels
- This represents a fundamental shift in how search results are presented and consumed [\[14\]](#)

The future of search: A hybrid approach

The future of search is not a zero-sum game between traditional search engines and AI platforms. Instead, recent studies indicate a hybrid landscape where both platforms complement each other. Usage of platforms like ChatGPT increases the usage of search engines, suggesting users switch between them depending on intent and context [\[20\]](#).

Google's official guidance emphasises that the foundational principles of SEO remain relevant for AI. Creating helpful, reliable, people-first content is still the cornerstone of a successful marketing strategy [\[5\]](#).

To thrive in this new era of search, businesses and marketers must:

- **Prioritise high-quality, original content:** Double down on creating content that demonstrates expertise, experience, authoritativeness, and trustworthiness.
- **Focus on user intent:** Use data to understand and address underlying user needs, regardless of the platform they use to find answers.
- **Strengthen technical SEO:** Ensure your website has a strong technical foundation, with a focus on page speed and structured data.
- **Build domain authority:** Invest in building a strong, credible brand and domain to increase your visibility and being positively cited by AI-generated results.

By embracing these principles and adapting to the changing landscape, businesses can not only survive but thrive in the age of AI-powered search.

Upcoming Event

Search in the Age of AI: How to Keep Your Brand Visible

Join Comprend for a breakfast session as we unpack the new search landscape and explore what it means for your organisation.

Location: Comprend London, Floor 4, 40-42 Parker St, London WC2B 5PQ

Time and date: 08:30-10:00am Thursday 29 January 2026

[View the agenda and reserve your spot today](#)

References

- [1] [SEO vs. GEO: What's different? What's the same?](#)
- [2] [5 SEO trends for 2025](#)
- [3] [81 AI SEO Statistics for 2025 \(Fresh and Original Data\)](#)
- [4] [The Impact of Google's AI Overviews on Organic Traffic and How to Respond](#)
- [5] [AI Features and Your Website | Google Search Central](#)
- [6] [Cloudflare Radar 2024 Year in Review](#)
- [7] [Website Load Time & Speed Statistics: Is Your Site Fast Enough in 2025?](#)
- [8] [New Google AI Overviews data: Search clicks fell 30% in last year](#)
- [9] [Google AI Overviews are hurting click-through rates](#)
- [10] [Google users are less likely to click on links when an AI summary appears in the results](#)
- [11] [Application Security report: 2024 update](#)
- [12] [2025 Imperva Bad Bot Report: How AI is Supercharging the Bot Threat](#)
- [13] [Bot Traffic Is on the Rise. Is Your Website Prepared?](#)
- [14] [34 AI Overviews Stats & Facts \[2025\]](#)
- [15] [47 AI Overviews Statistics \(2025\) - Adoption, Traffic & Trends](#)
- [16] [Google Modifies Search Results Parameter, Affecting SEO Tools](#)
- [17] [Ecommerce Conversion Rate By Industry In 2025](#)
- [18] [AI Overviews vs. Organic Search: The Hidden Impact on CTR](#)
- [19] [The next step for content creators in working with AI bots: Introducing AI Crawl Control](#)
- [20] [Google Usage After ChatGPT Adoption](#)