



Speakers

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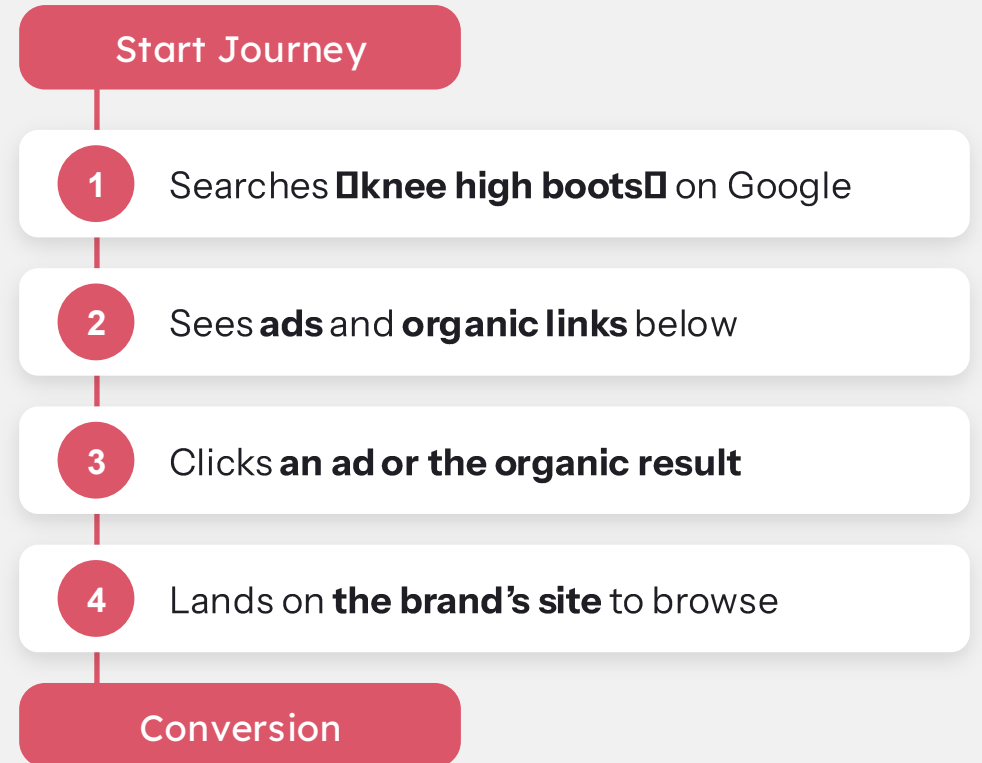
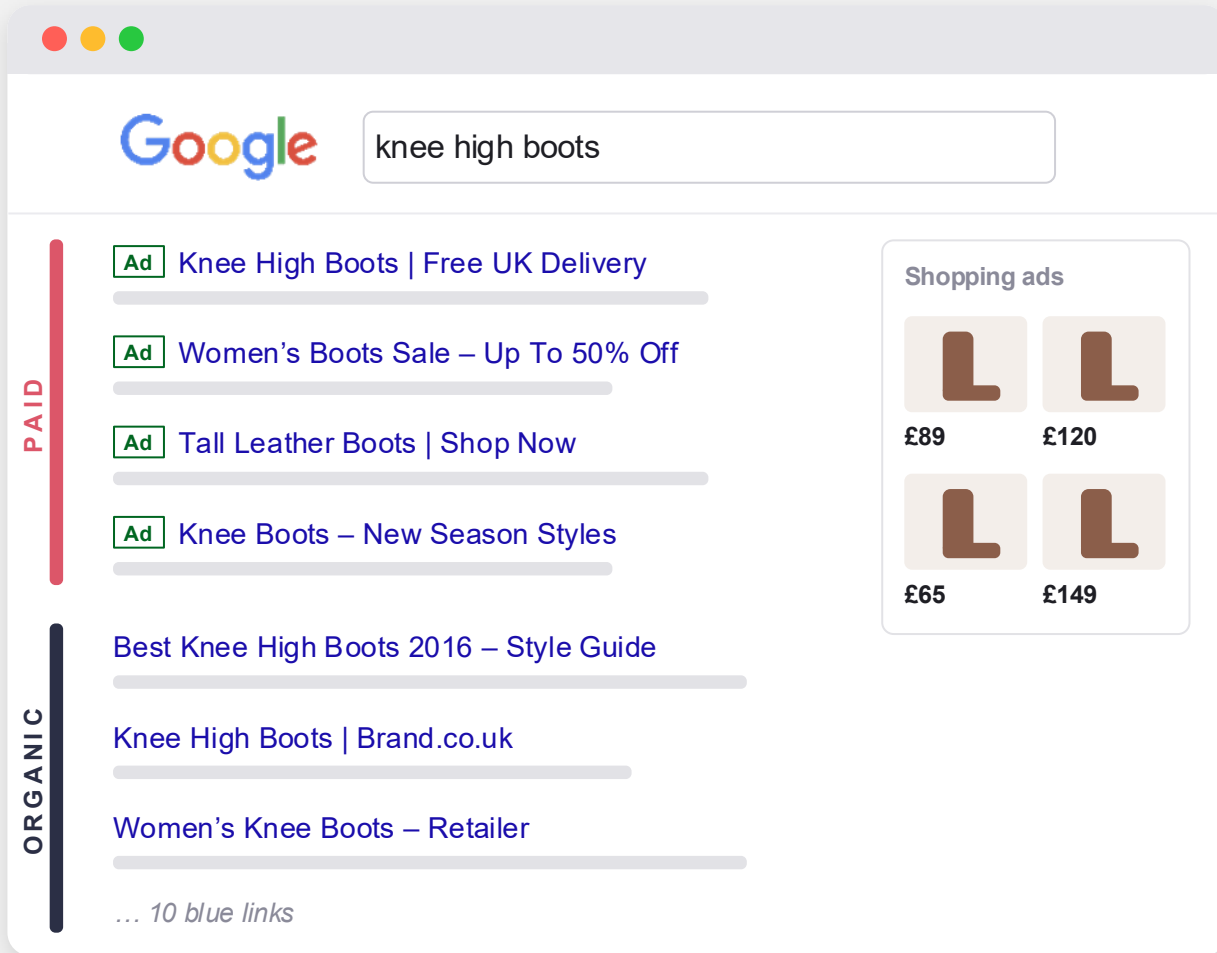




The new rules of search: Are SERPs
disappearing to AI?

The new rules of search

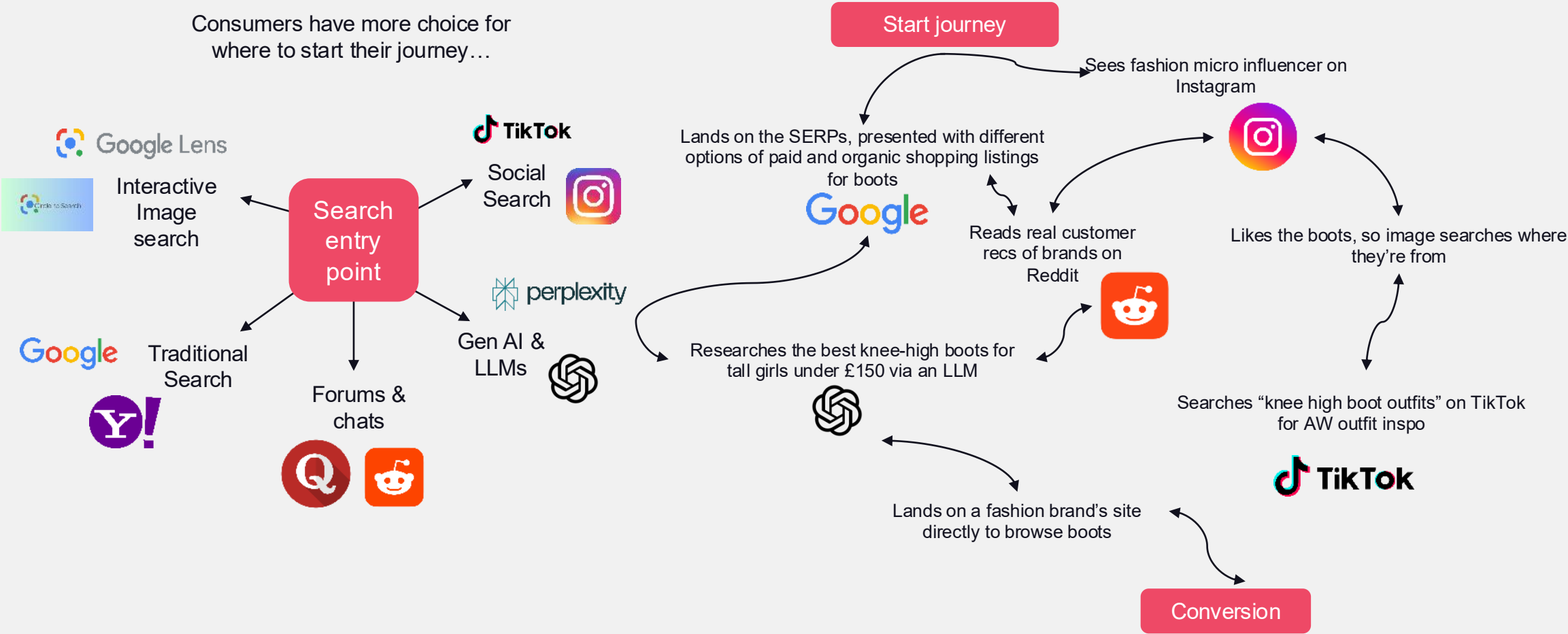
What the SERPs used to look like...



Paid and organic shared one page. Each step was a lot more trackable.

The new rules of search

...and what they look like now



The new rules of search

The paid inventory space is also increasing

New paid inventory since the rise of AI

Ads inside AI Overviews **US only**

Ads in AI Mode **US only**

AI-powered Shopping ads **Rolling out**

Direct offers **Pilot**

Conversational & Highlighted Answer ads **Testing**

ChatGPT ads **Live in UK**

Google has already recommended to use AI Max, broad match and Performance Max, to maximise coverage within Google's AI spaces, but reporting capabilities of this is still not confirmed.



What **impact** is this having?

Organic traffic is continuing to drop

AI use is going up

- **88% of informational keywords** brought back AIOs
- Around **35% of UK customers use LLMs during online shopping**
- At least **1 in 5 consumers** begin research with LLMs

Traffic is going down

- **Organic traffic growth fell from 26% to 4%** after Google's AI search rollout
- Organic click-through rates can fall by around **40% when AI Overviews are present**
- The common pattern is that informational queries suffer most, while commercial-intent searches tend to hold up better

The customer journey has changed

- **21% of US web users** visited ChatGPT at least once a month
- **13% of UK respondents** said they now favour AI-powered tools over traditional search engines for general queries

The new rules of search

Meanwhile, the paid auction is
getting busier, more
competitive and an attribution
mess

\$63.3bn

Google revenue in Q2 2026,
up by over +17% YoY!! (crazy)

+17%

More paid search spend YoY
for roughly flat clicks

+35%

More advertisers competing
in search query auctions

25%

of the time challenger
industries lost ad visibility
when an AI Overview showed

What it means for paid



Ads are moving into the answer

Google now serves ads inside AI Overviews and is testing new formats in AI Mode. US first, other markets will likely flow.



Access runs through automation

Eligibility hinges on PMax, AI Max and broad match, so less keyword control and more trust in Google's AI.



Measurement gets murkier

AI Overview ads sit under 'Top ads' with no split, and search terms can show inferred intent, not the real query.



A 2nd paid auction is opening

ChatGPT ads went live in the UK in June 2026, sold direct by OpenAI, what happens if the search takes you to Google? Is still unknown.

What can we do about it?

Optimise ourselves to **appear everywhere**

A connected channel approach to organic search in a dynamic landscape when **appearing everywhere** is crucial to winning both in **traditional search** and **AI**.



Power of brand

LLMs surface social content, and weight this and mentions/referring domains via digital PR – being omnipresent and having a connected strategy is key for ranking in LLMs and Google.

Content

Write for LLMs with correct information architecture, answer specific questions, and anticipate follow up questions.

Trust

Leveraging influencers and experts for E-E-A-T.

Technical

The foundations of SEO lay the basis for visibility, and **schema mark-up** becomes more important

Connecting with paid

Sharing insights across copy and shopping listings ensure you're answering customers' needs, helping to drive visibility.

The new rules of search

Tailor your organic strategy around the **LLMs that are important to you**

Best practice SEO combined with the focus areas of your priority LLMs will help you to appear everywhere organically.

ChatGPT

- Social and community influence
- Third-party listicles
- Brand mentions

Research-led purchase journeys, like travel

Gemini

- Entity clarity
- Clear service pages, structured FAQs, and pricing information

Retail, fashion and travel sectors

AI Mode & AI Overviews

- Supporting content strategy
- Brand mentions and referring domains
- Social search strategy with emphasis on YouTube

Ecommerce sectors

Claude

- E-EAT
- Thought-leadership content with first-party data
- Domain authority of cited sources

B2B, research-heavy, and compliance-focused sectors

Perplexity

- Fresh and new content
- Brand mentions and referring domains
- Positive community sentiment

B2B research, healthcare, and finance sectors

The new rules of search

Paid media rules for the new rules of search

AI hasn't shrunk the auction, it's just changed what wins.



Feed the platforms better signals

Broad match, AI Max and PMax are your ticket into AI answers. But the algorithm is only as good as what you feed it: clean conversion data, rich product feeds, and strong assets.

Audit your data you feed into the platforms.



Defend your brand when it counts

AI Overviews often name competitors, even on searches for your own brand. Brand campaigns are cheap insurance, so keep them live and watch who else is bidding.

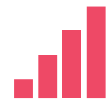
Check brand SERPs and auction insights



Test new auctions and diversify spend

Search now happens in ChatGPT, AI Mode and social, not just on Google. ChatGPT ads are already live in the UK. Test early, before the auction gets crowded.

Set a test budget with one clear success metric



Build a robust measurement framework

Pricier clicks means each one has to earn its place. With journeys looping through AI, social and search, last-click can't show what's working. But incrementality can.

Run geo or holdout tests to measure true lift

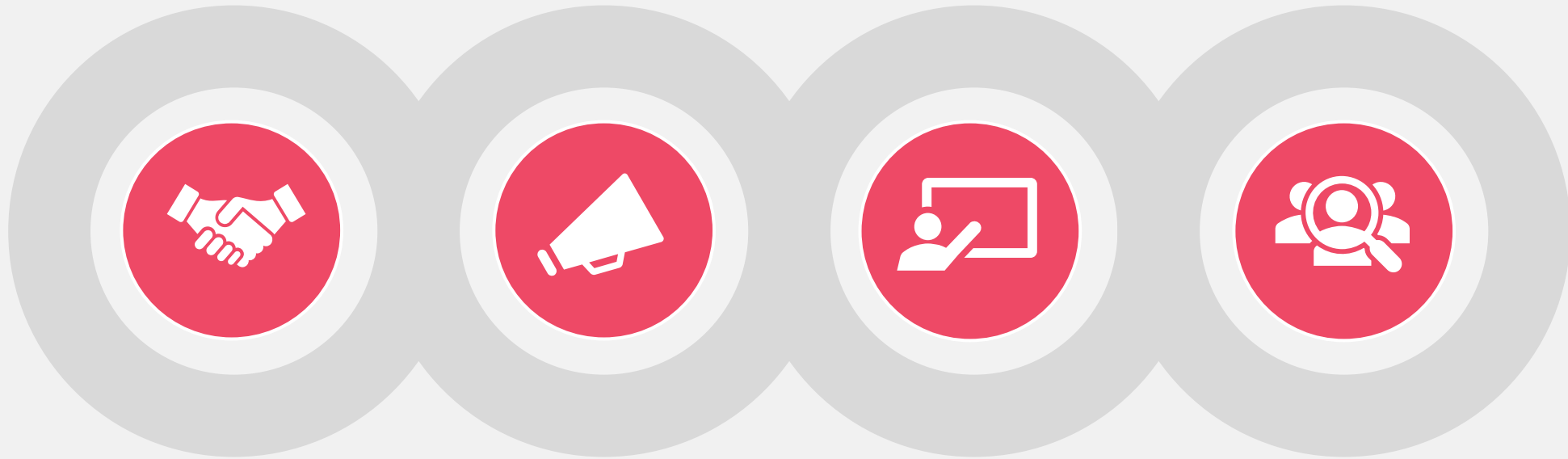
So, are the SERPs
disappearing?

NO! They're just fragmenting

The brands that win will show up wherever the search happens: in the answer, under it, and in the auction.

The new rules of search

But you need to **adapt to be visible everywhere**, so you can...



**...build
authority and
trust**

**...increase
brand
awareness**

**... own the
conversation**

**...capture
potential
customers**

Thank you for listening.

Feel free to connect with us on LinkedIn!



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