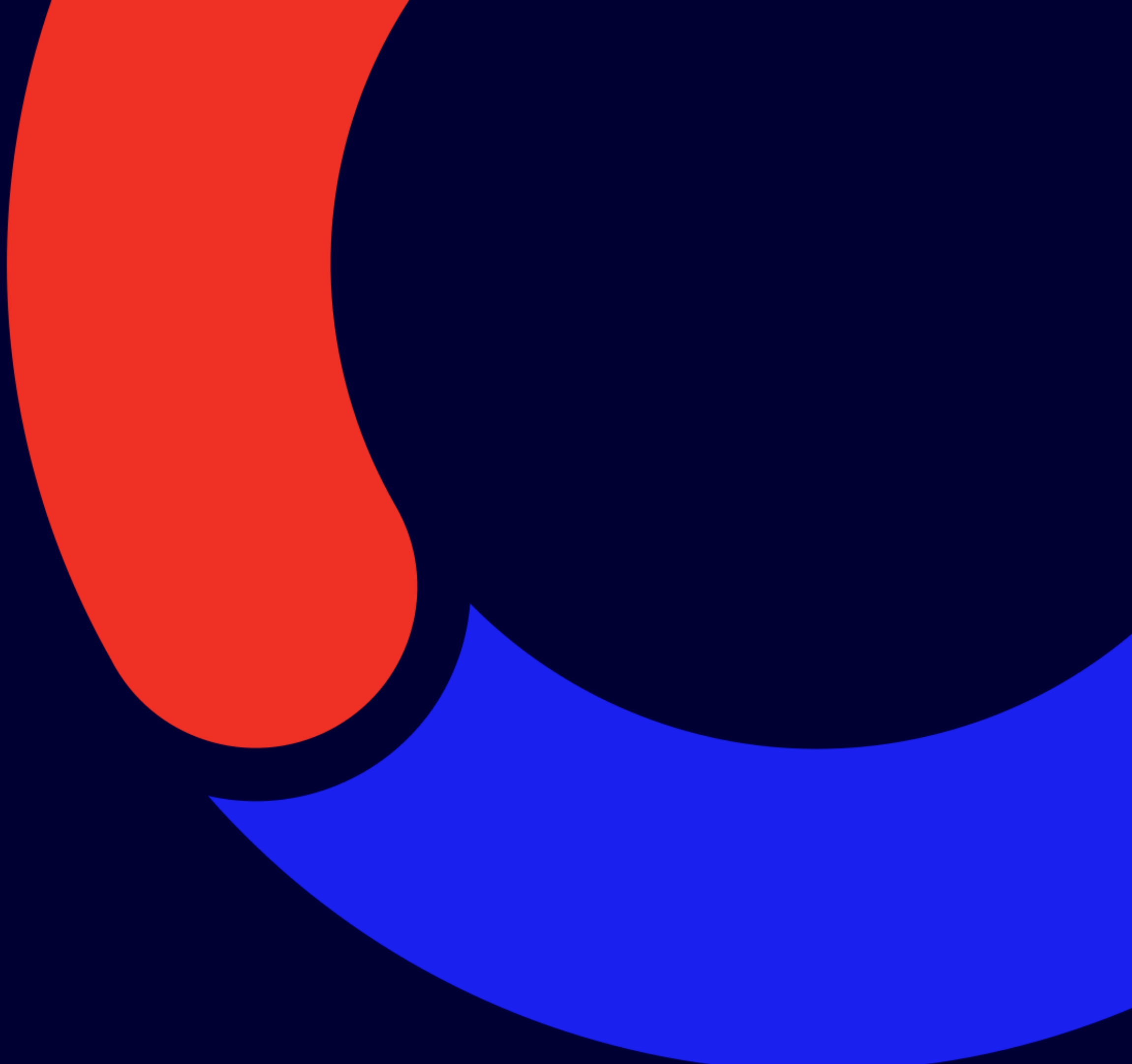




omd



Generative Search

Navigating the transition of search from channel to AI powered behavior

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WE *Create* WHAT'S NEXT

To navigate the transition to generative search build Recommendation Equity

Search Stops Finding; AI Starts Deciding

Today, search is no longer just a channel, it is a behaviour that moves across platforms depending on the task, and generative AI has rapidly become part of this behaviour.

Blending quantitative scale with qualitative depth, Omnicom Media's new global study across 20,000 respondents in 17 countries found [that 75% of consumers now say they have used some form of generative AI](#), and [63% of those users interact with AI platforms daily](#).

Daily habits create new default pathways. While ChatGPT and Gemini lead by far in terms of reach, Perplexity, Claude and Microsoft Copilot see [over 50% of their users daily](#), engraining new habits and new levels of trust.

However, there is no 'default AI' yet, with people choosing AI platforms by task. On average people use [2.4 AI platforms](#), with significant uplift in some markets for local brands such as Naver, You and Line.

Gen AI platforms are task specific



"I choose tools based on what I need at that moment for quick facts official websites or a real-time information Google feels faster and more reliable ... but when I need an explanation, rewriting translation or help organizing ideas ChatGPT works better."

This pace of adoption is unprecedented. In just three years, generative AI has become one of the fastest behavioural shifts in digital history, outpacing the early adoption curves of previous internet technologies.

The result is a fundamental shift in expectations. Traditional search returns options, while generative AI returns an [answer](#). However, amid the rapid pace of change, consumer trust is still recalibrating.

A clear credibility gap remains: [40% are concerned about accuracy and reliability](#), [38% worry about misinformation and deepfakes](#), and a further [38% cite data privacy as a key concern](#).

There is a growing need to build 'Recommendation Equity', which is the degree to which a brand is structurally trusted, interpretable, and credible enough for the right product or service to be surfaced by AI when a consumer asks a relevant question.

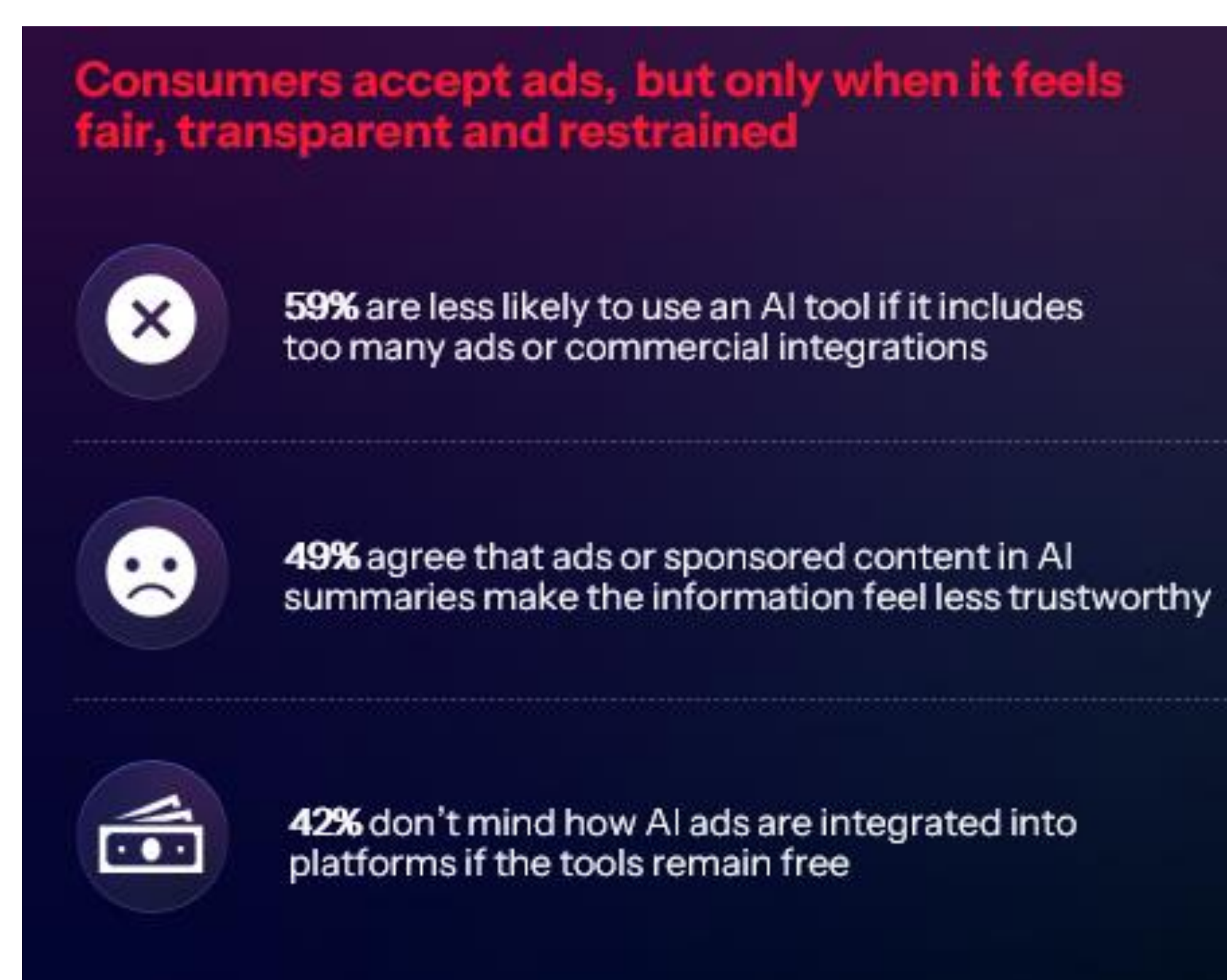
Ad Markets Accelerate in AI's Slipstream

Influence is increasingly won before purchase. [AI's influence is strongest at Inspiration and research stages](#), meaning it is setting the consideration set before consumers reach the platforms where brands have historically invested. Brands that only optimize for the checkout, or for the click, are arriving after the decision has been shaped.

The platforms recognize this issue too, with Google signalling a 'two-track' future, describing [Search as a web connection product](#), and Gemini as a productivity/creation assistant. Acknowledging they could converge, diverge, or be replaced by "a third product altogether.

As commercial integrations accelerate through ads, sponsored recommendations, and agentic solution rollouts, this tension intensifies. This acceleration also collides with trust sensitivity that remains. When AI shifts from advising to selling, the credibility equation changes. With [53% of consumers saying they don't really trust brands' motivations for using AI](#), consumers begin to question is this answer helpful, or if it is paid.

Consumers don't reject ads outright, 42% don't mind how [ads are integrated if AI platforms remain free](#), and 41% think [sponsored links in AI summaries will help discovery](#). However, they reject opaque or excessive commercialization; 59% are less likely to use an AI tool if it [includes too many ads](#), and 49% say sponsored content makes information feel [less trustworthy](#). Useful, labelled, and restrained are the design principles to follow.



This underpins the importance of multimodal discovery. As indexing expands beyond text, the winners will be those who ship [consistent product/brand narratives](#) across video, creators, podcasts and community because that is what will be "understood" and retrieved, building trust.

The challenge of building 'Recommendation Equity' is the situation that search investment was in [circa 2005](#). The brands that moved early then built advantages that compounded for a decade.

What This Means for Advertisers

Our research describes the new economics: AI compresses exploration, and consumers report “seeing fewer brands but feeling more confident deciding.” That is the opposite of the historical SERP model, where visibility could still translate through clicks.

The tech experts in our study believe the biggest transformation will be in how consumers find brands/products (60%). Looking at the current landscape, only [38% of Google AI Overview](#) citations now come from top-10 organic results, down from 76% in mid-2025. Traditional SEO rank is no longer a reliable proxy for AI visibility. A further [80% of citations](#) by ChatGPT, Perplexity, and Copilot [don't rank in Google's top 100 at all](#).

Engine	Top Citation Source	Monthly Scale	Web Search Trigger
Google AI Overviews	Reddit (21%), YouTube (18.8%)	Billions of queries	Always on
ChatGPT	Wikipedia (47.9%)	30B+ prompts/month	31% of prompts
Perplexity	Reddit (46.7%)	1.2–1.5B queries/month	Always on
Claude	.gov/.edu/primary sources	Growing rapidly	Variable by plan

Looking to the future, the [GEO market](#) is valued [at \\$848 million today](#) and projected to reach [\\$33.7 billion by 2034](#), with [54% of US marketers](#) planning to implement it within the next three to six months, delivering

- Structured [data and schema so AI can parse content hierarchy](#), with product and brand truth expressed in machine-readable formats like [schema markup](#).
- On-topic copy: AI prefers content that communicates its purpose with clarity and [clean commerce data](#) that AI agents can consume at the product level.
- Ecosystem presence: if more than [95% of links cited in AI outputs are from non-paid media](#), then earned credibility; reviews, expert mentions, forums, and creator validation become an input to AI visibility, not just reputation management.

To build ‘Recommendation Equity’ aligned to today’s search environment, it needs to be a [cross-functional](#) solution. OM’s [AI Optix framework](#) translates this into five connected disciplines: Consumer Behavior, Credibility, Content, Commerce, and Code.

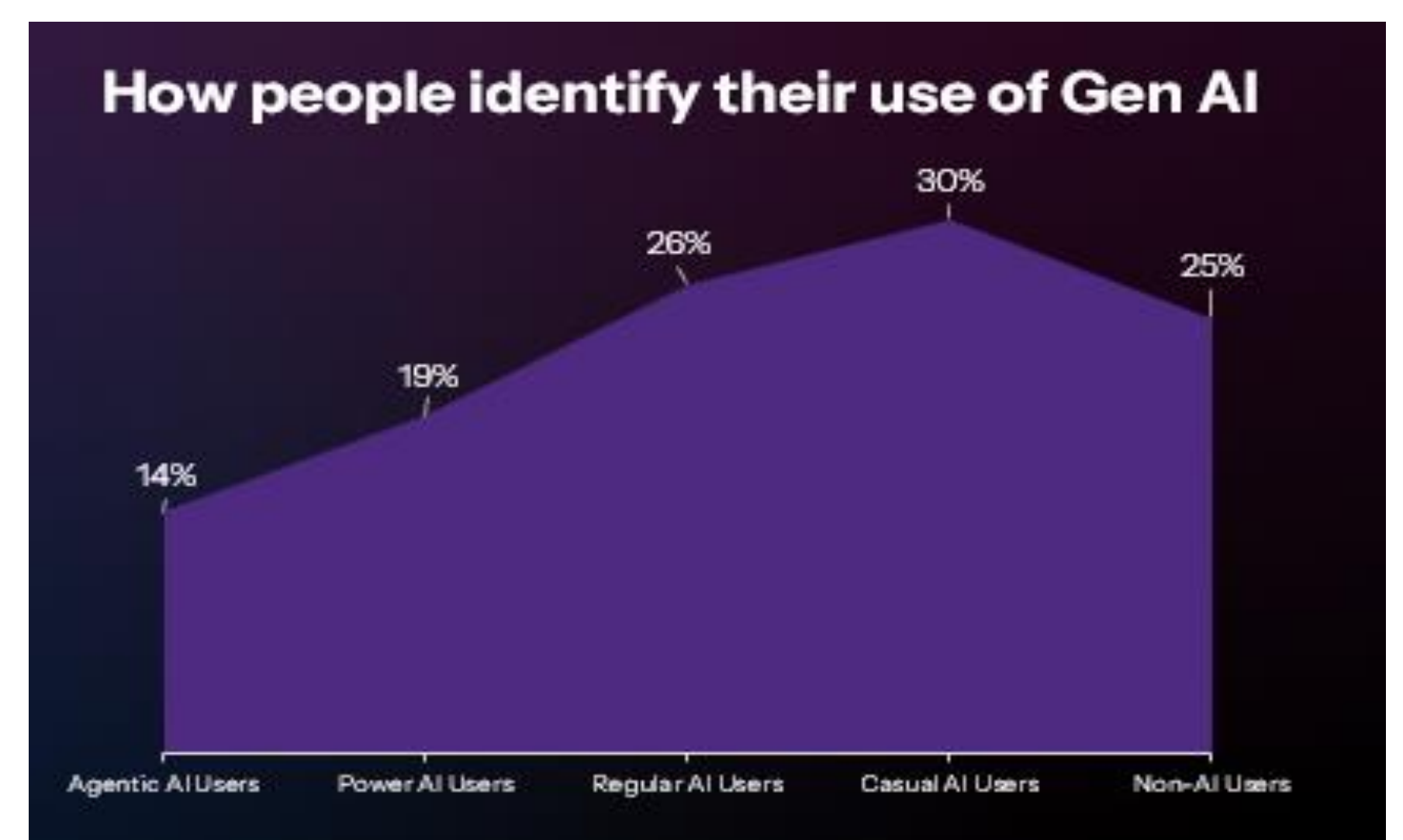
This solution looks at both the human elements, such as mapping the “AI Journey Map” alongside search and social playbooks and understanding consumer prompts, as well as measuring inclusion, tone and sentiment (not just impressions) and tracking discoverability and recommendation across the different Generative AI platforms.

Recommendation Equity, Not Ranking

GEO is not the end destination. It is the bridge to the [next challenge: Agentic Experience Optimization](#), evolving from just being cited in AI answers to being included in the agent decision policies that act autonomously on behalf of users.

If agents [reshape the web’s traffic model](#), brands will need a plan for “machine-to-machine” influence, where “agents are doing a lot of interaction on the internet” and “agents are talking with each other.” The same premise is seen in media execution, with agentic workflows and protocols like the [Ad Context Protocol](#).

We can now see a path to where search, commerce, and advertising converge into a single machine-mediated transaction. Our research shows that window is open now. The [14% who are already acting agentially](#) are the leading indicator. The question is not whether the mass market follows. It is whether a brand is interpretable and trusted enough to be recommended when it does.



What to do now:

- Understand how consumers are seeing, engaging, and trusting your brand across AI.
- Audit [‘AI interpretable’ assets](#): schema, product catalogues, FAQs, comparison pages, and top 50 ‘category definition’ queries.
- Build credibility inputs: creator partnerships, review velocity, authoritative mentions, because [recommendation is trust at scale](#).
- Run inclusion testing across ChatGPT/Gemini and AI Overviews-like surfaces, tracking: (a) presence, (b) framing, (c) comparative outcomes, (d) [citation sources](#).

The key question is no longer “Are we optimizing for ranking?” It’s “Are we building recommendation equity?” - Brands will need to navigate the trust, content and measurement redesign required for AI-mediated discovery because the foundations built now will determine who gets recommended later.



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