omd

Rapid Response

Generative and Agentic Consumer Experiences

Tracking Changing Consumer Behavior in the Context of Rapidly Advancing Technology

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WE Create WHAT'S NEXT

Continued Expansion of AI impact

OpenAI's Developer Day (DevDay2025) this week shed light not only on a wide variety of new AI surfaces for brands to exploit but also on the continued shift in mass consumer behavior.

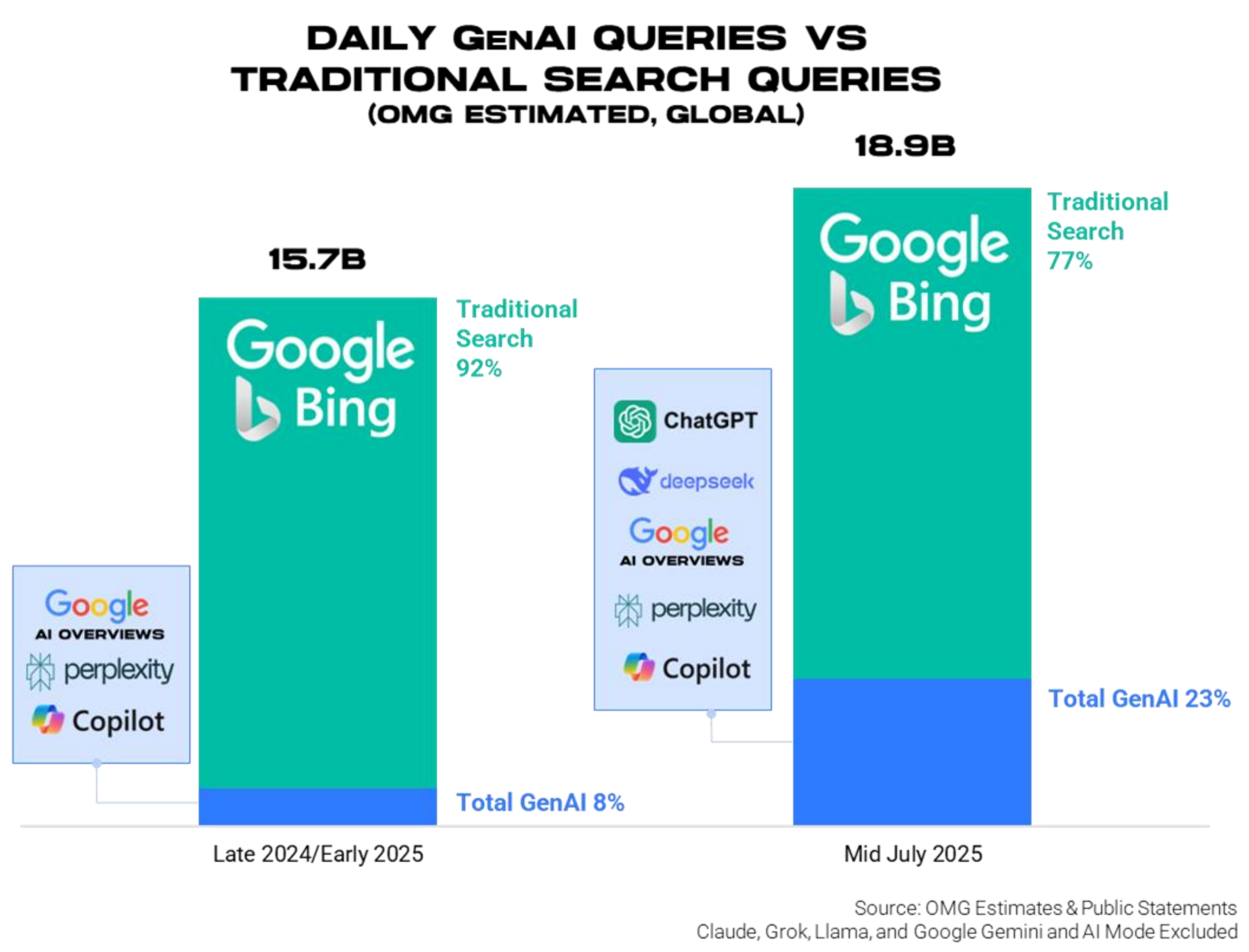
800 million people per week now use ChatGPT, doubling from 400 million weekly users in February 2025. This is driven by an expanding set of business and consumer use cases. While the API processes over 6 billion tokens per minute, powering a wide variety of third-party services.

Rapid growth rates in AI service adoption and impact on consumer journeys are illustrated in new research: Generative Engine Optimization (GEO) – The New Paradigm for Discovery in the GenAI Era, released this week by OMG North America.

It shows that usage has reached a mass scale, with 75% of users employing some form of AI, and 46% using it daily. In younger cohorts, it is used by almost all; Gen Z (92%) and Millennials (88%) lead adoption, with Gen X (69%) and Boomers (47%) following.

85% of consumers agree that AI has already changed how people search; 39% report shifting most of their searches from traditional engines to GenAI, with 47% of Gen Z and 55% of Millennials.

This represents a significant shift in the landscape in which people search.



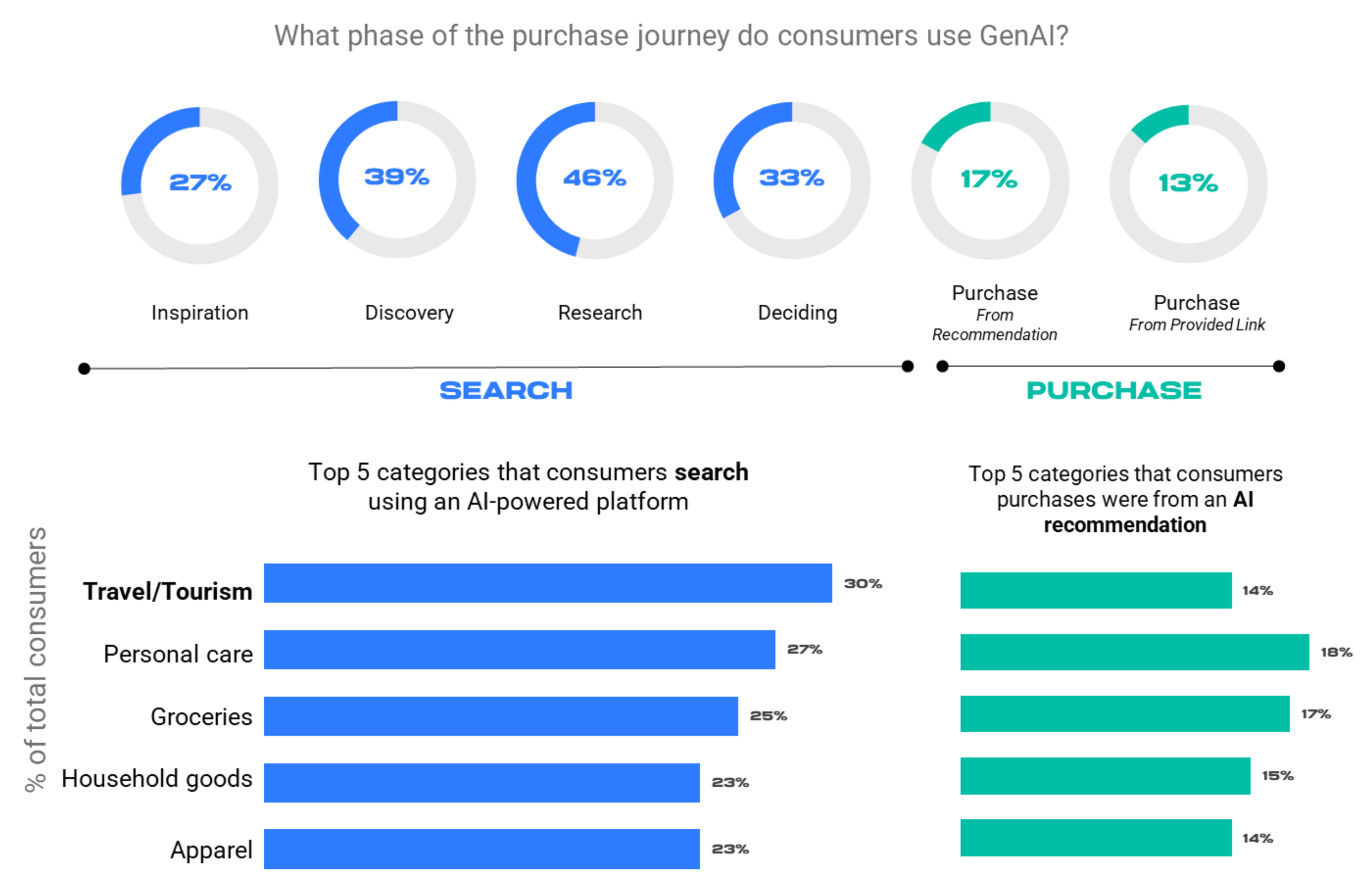
Data points modeled in the report indicate that 23% of queries each day are GenAI-based queries, if we include Google AI overviews or AI mode alongside ChatGPT, DeepSeek, Perplexity, and Copilot. AI Overviews are now mainstream: 50% almost always check them first, and 65% expect answers from them (20% exclusively; 45% mixed).

Trust is rising but remains conditional; consumers still rank traditional search (86%) higher than AI Overviews (68%) or GenAI platforms (61%), but both AI figures have increased sharply year-over-year. Privacy remains the sticking point; 49% are skeptical that their data/history will be used ethically, so brands need to build trust carefully.

A Quantifiable Impact on Purchase Journeys

AI utility is currently strongest in the upper-funnel. People use it for product familiarization (46%), discovering options (39%), and inspiration (27%).

Only 17% say they have purchased based on a GenAI recommendation (vs. 45% search; 40% social). This is likely a function of immature technology, as credible ways to get agents to buy on our behalf have not yet existed. This barrier is disappearing. Google's Agent Payments Protocol (AP2) and OpenAI's Agentic Commerce Protocol (ACP) both seek to become the way in which trusted agentic commerce is delivered.



Adoption differs by category; travel is a standout as complex logistics and highly personal preferences make the category uniquely AI-ready. Higher price points mean fewer people are prepared to transact yet, with sectors such as personal care and groceries leading in lower-funnel agentic decisions.

The headroom for advertising formats is large; the report states that only 1% of gen AI search queries occur in ad-supported environments. As markets mature, this will need to change.

The most immediate challenge is to gain visibility in AI search environments, be they AI-powered traditional search, e.g., Google AI Overviews, searching within a chat interface (e.g., ChatGPT), an AI native search engine like Perplexity, or AI-powered commerce, e.g., Amazon Rufus.

The OMG GEO report describes 4C's for brands to understand and innovate around;

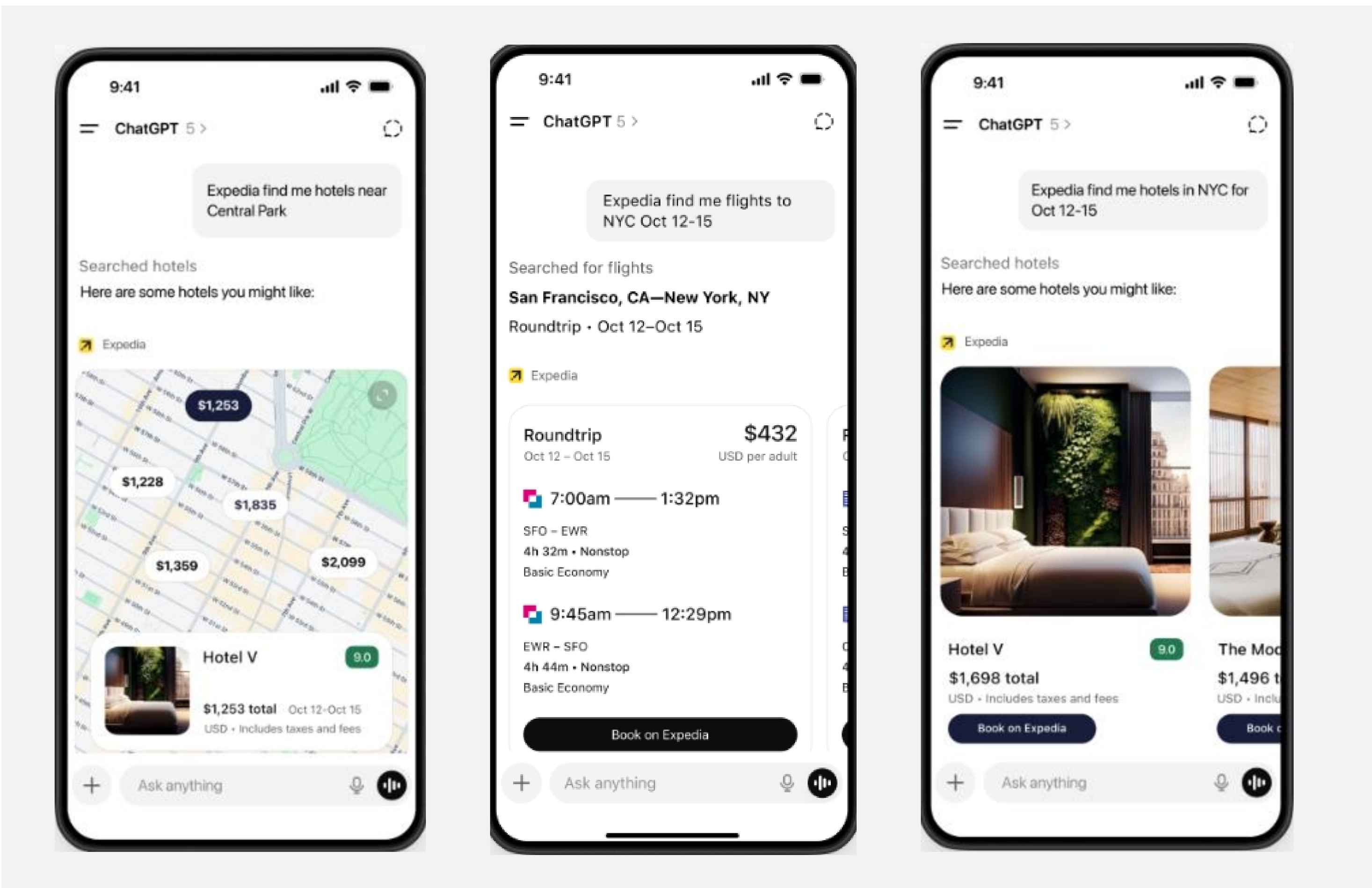
- Design AI logic around **consumer** intent
- Extract digital **content** with intent
- **Code** for AI with care
- Build an ecosystem of trust, as **credibility** is foundational to GEO

We introduce a set of principles and tactics to make GEO a roadmap to deploy meaningful changes for clients. This is especially important as AI moves beyond disrupting existing behaviors and formats to deliver entirely novel touchpoints and experiences.

New Surfaces for Consumers and Brands

The OpenAI DevDay 2025 showcased a wide variety of innovations that will shift the way that brands and customers interact.

Apps in ChatGPT enable brands to not only appear in the model's response, but they can also be the response. Apps can be called by name (a new task for paid media?) or surfaced by the model if they are deemed the most relevant (a new GEO task).



Travel brands, such as Expedia, have been among the first to capitalize on this opportunity, releasing their integration on launch day.

Some have commented that the Apps in ChatGPT feature is a shift towards a model that has been dominant in Asia. Super-apps, such as WeChat, integrate services from multiple brands, large and small, around a single identity, technology, and payment architecture.

If consumer behaviors in EMEA and the Americas follow those seen in Asia, then brands will need to embed themselves in many 3rd party consumer interfaces, being mindful of the increased potential for consumer switching. Brands can develop their own solutions to integrate with ChatGPT using the OpenAI Apps SDK.

The reverse is also now possible, as ChatGPT can be integrated into a brand asset with the new ChatKit, which is part of AgentKit —a set of tools designed to build custom agents around GPT model capabilities, such as this interactive world.

Perhaps the most significant release to understand and utilize is the new Agent Builder. This is a no-code visual canvas to design and version multi-agent workflows. It connects private files to MCP servers through defined workflows and in accordance with enterprise guardrails.

Just as custom GPTs have enabled the chat modality to impact enterprise tasks, the Agent Builder will both democratize and enable agentic workflows across various enterprise tasks and consumer need states.

What Does this Mean?

AI is shifting 'search' from summaries to agentic workflows; planning trips, assembling shopping lists, or optimizing large purchase decisions.

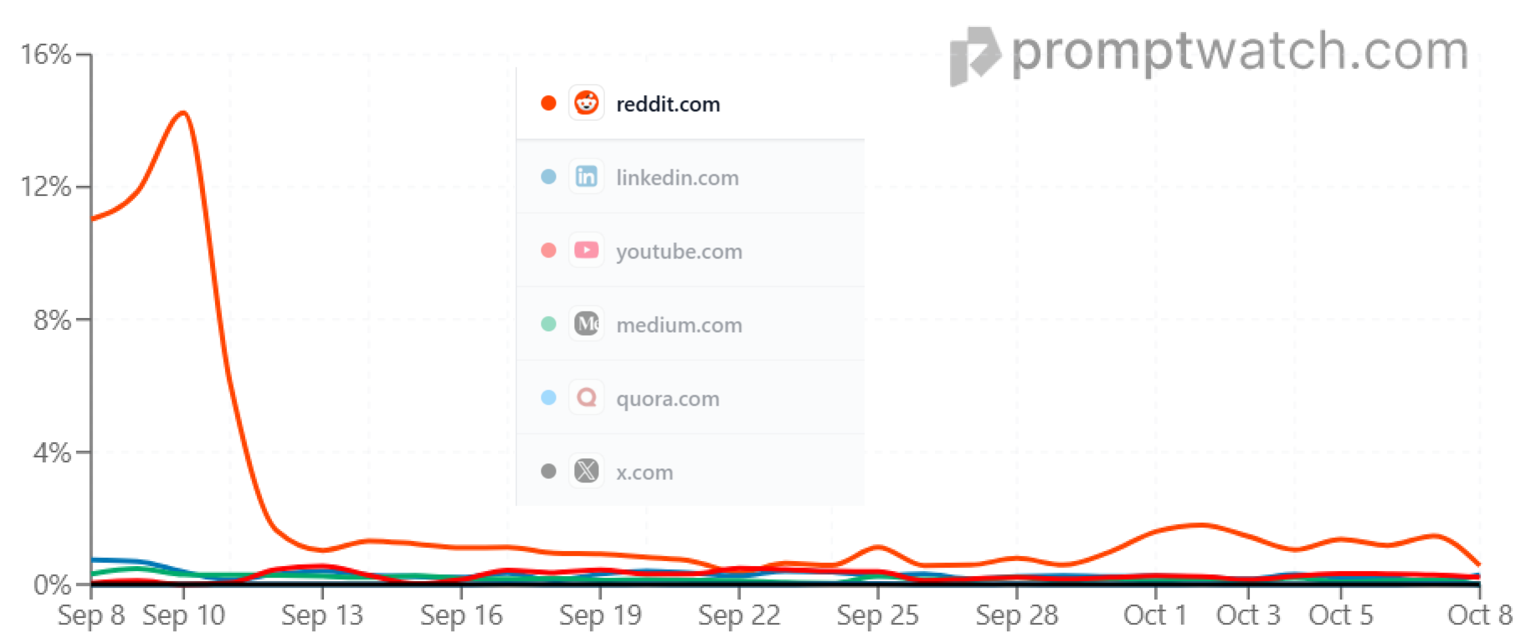
Paid monetization will emerge in time. We can expect AI providers to experiment with skippable units, utility widgets, and embedded commerce; however, given user sensitivity to "sponsored outputs " relevance, and utility will be the enabler of admission.

OpenAI plans to open up revenue sharing to the four million developers already active on the platform, so we can expect a plethora of new ideas to engage consumers through utility, value, content, and purpose. Brands will play a key role in scaling the best of these.

In the near term, organic inclusion is the focus; our 4C's (Consumers, Content, Code, Credibility) GEO framework turns theory into repeatable practice via visibility audits, content/tech tactics, and credibility programs.

Winning brands will be those that speak with clear intent, stepwise structure, render the most empowering answers, and supply machine-readable proof (through schema, citations, and authoritative third-party validation).

These are dynamic reactive processes, as sources of authority are volatile, as evidenced by a sudden drop in Reddit citations for ChatGPT in September.



Over time, "presence metrics" (e.g., Overview share, assistant mentions) will sit alongside performance metrics in standard dashboards, connecting upper-funnel AI visibility to downstream paid and organic conversion.

As AI becomes the place and way people search, early movers will set model priors and reap compounding returns as model capabilities continue to evolve. Brands will need expert guidance to navigate this shift.

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