

# Search is changing forever. Are you ready?

## Our search habits are changing...

AI is now a daily habit, and the traditional journey is evolving faster than ever. Learn how to stay visible and build authentic trust in the age of AI.



**SearchPulse Q4 • 2025**



# Your personal AI expert awaits.

**Ready to explore the report in more detail?**

Download the report online to unlock exclusive access to our AI agent - your instant guide to deeper, faster insights.

[Ask anything about the findings and explore the data like never before.](#)

**TALK TO OUR AI AGENT**





As we begin the new year, one thing is clear: change in the search space isn't slowing down, it is accelerating, and with it, our need to adapt.

This fourth edition of SearchPulse continues to chart the search evolution. What we're seeing now isn't a simple shift, it's the redefinition of how, where, and why people search. AI has moved from an emerging trend to an embedded part of the journey for many, and platforms are responding fast. So too must we.

The insights in this report aren't just about what's happening, they're here to help you shape your strategy with confidence. Whether it's understanding multi-platform behaviour, zero-click environments, or AI as a shopping assistant, we're focused on giving you practical takeaways that move you forward.

Now in 2026, SearchPulse will go even deeper, breaking these behaviours down by industry to help brands understand not just the macro shifts, but what they mean in your specific sector.

Because the opportunity ahead lies not in keeping up, but in building with intention; rooted in human behaviour, informed by data, and led by a clear understanding of your audience.

Thank you, as always, for reading. We hope this fuels the start of a successful 2026 for you. Helping you to feel more ready, more resilient, and more curious about what's next.

**Becky Simms**  
CEO & Founder, Reflect Digital

# Executive summary.

I didn't think I'd be writing this next sentence so soon, but here we are. The digital landscape is no longer simply "changing"; it is undergoing fundamental re-engineering. Move over "messy middle", bye bye "traditional funnel" - the future is here. The future is **everywhere**.

The lines between traditional search, social inspiration, and the AI tools we're all using are blurring faster than you can fix a formula error in a spreadsheet.

This forces marketers, like you, to bin the old plans and rewrite strategies at lightning speed. It's not enough to just show up in search anymore.

We flagged this in our Q3 report, and the data is shouting out the same thing: You have to be strategically integrated across the **entire consumer journey**.

You need to be ready to meet consumer intent, whatever form it takes, and be present on whichever channel it is on.

Our Q4 data confirms the acceleration of this multi channel future, proving that AI has moved from a disruptive concept to an embedded reality.

**How ready are YOU for this change?**

## 1. AI adoption threshold crossed a full quarter earlier than anticipated.

- **Q4 Highlight:** The mainstream threshold? It's been passed. For the first time, a majority of the people we surveyed (52%) are now using AI search tools at least sometimes. We expected this to happen in Q1 2026.

### Q | What YOU can do...

This shift confirms AI is an essential marketing channel and signals a new baseline for consumer search behaviour. Brands must proactively incorporate AI visibility by optimising content to be concise. Include generative answer plans into your core digital strategy to maintain, or gain relevance.

## 2. Search platforms are fighting to give you the answer now

- **Q4 Highlight:** Google Search is still dominant, but its consistent decline is speeding up. Why? Users are flocking to Google's own AI products like Gemini and AI Mode.

This isn't a fight between platforms; it's a battle for the most efficient answer, and that's often happening inside the search engine before your customer ever clicks.

#### Q | What YOU can do...

The challenge has shifted from simply ranking higher in a SERP to optimising for the “zero-click” conversion. Invest in content architecture (structured data, FAQs, clear authority signals) to ensure your brand's expertise are the source powering these authoritative AI-generated answers.

### 3. AI is rapidly becoming the savvy shopper's secret weapon.

- **Q4 Highlight:** AI's application in e-commerce is clearly focused on value. The leading use cases are transactional and cost-focused: looking for deals, comparing prices, and finding discount codes. This is strongest in the crucial 25-44 age segment.

#### Q | What YOU can do...

Consumers see AI as a tool for affordability, not just convenience. If that's your core demographic, you need to optimise your product info, offers, and value propositions to be easily recommended and read by AI assistants. The brands that make finding savings frictionless with AI are the ones who are going to win serious loyalty.

We understand that navigating this new normal where AI crosses over, but still contends with deep-seated trust issues, is complex.

The brands that succeed will be those that deeply understand the intent behind the search at every funnel stage, from inspiration on social media to the final transactional click on a dedicated booking site.

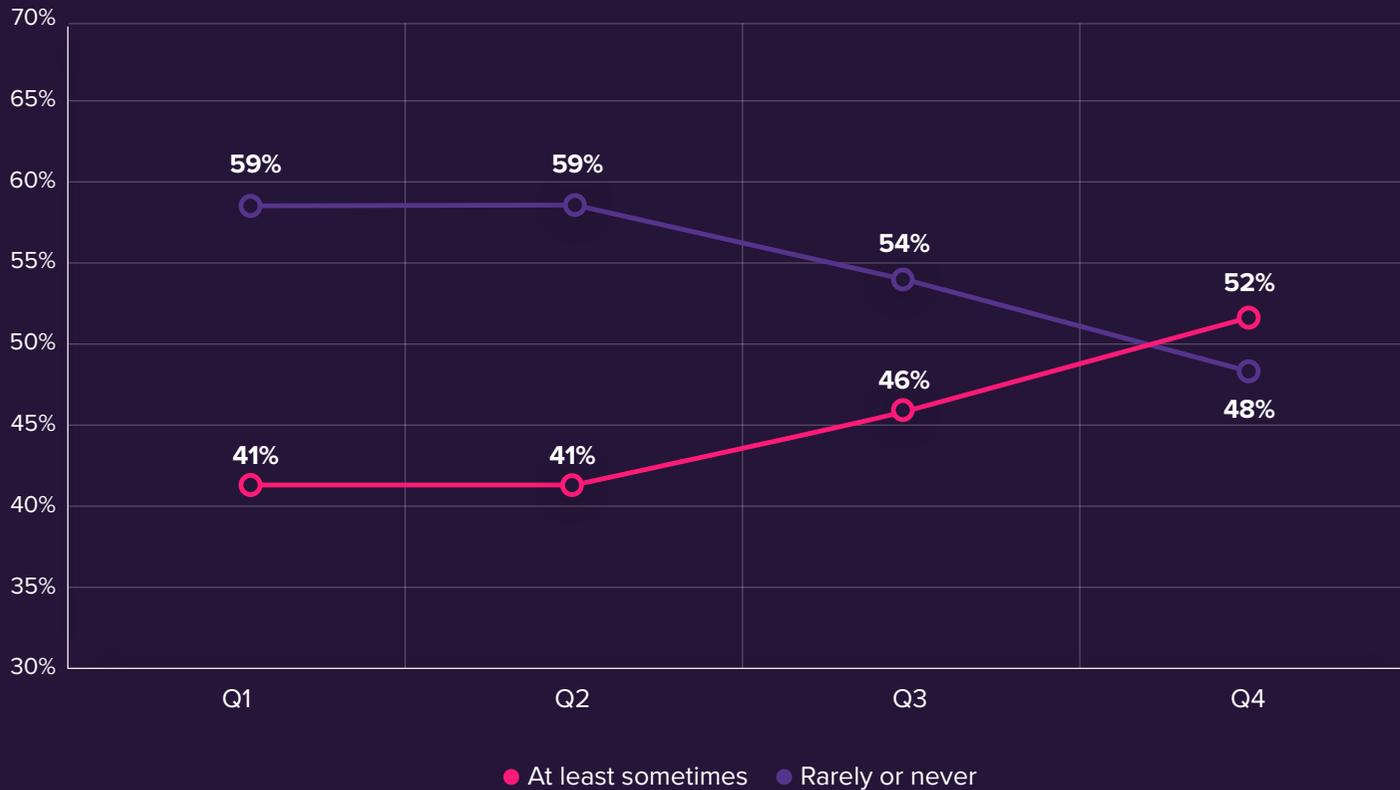
If you can ground your strategy in the human needs driving these technological shifts, you can ensure your brand remains visible, relevant, and ready for whatever future change comes next.



**Azeem Ahmad**  
Strategy Director



# AI adoption threshold crossed a full quarter earlier than anticipated.



Q3. How often, if ever, do you use AI tools, like ChatGPT, to search?,  
n=8000 | Reflect Digital SearchPulse Q4 2025

For the first time since the survey launched in Q1 2025, we are seeing more respondents using AI tools at least sometimes than rarely or not at all.

Adoption is still increasing, it appears, indicating marketing efforts that place brands in AI spaces is still a valuable (and ever increasingly so) endeavour.

# Reflect reacts.

As we predicted in Q3, albeit earlier than anticipated, the cross-over between those who, at least sometimes, use AI tools and those who rarely or never use it, has occurred. Within our survey sample, the use of AI tools now accounts for a significant proportion of total search activity for a majority of respondents.

We're no longer in the early adopter stage - we're firmly planted in AI being an 'early majority' behaviour, and regardless of how we feel about this, it's imperative that AI is a part of the overall digital strategy in some way; whether that's being visible within AI responses for search terms, or implementing AI tools on websites as it becomes an ingrained part of consumer decision making.

It's unlikely a blanket approach is the answer though. AI's use will be dependent upon intent and purchase funnel stage. But as AI platforms introduce checkout experiences, it could well be that AI becomes an integrated, end-to-end channel.

**The time for asking questions is over, now you need to take action.**

**Ed Cox**

Behavioural Insights & Analytics Lead





**The real battle in search is winning attention before a click, by knowing how your audience behaves.**

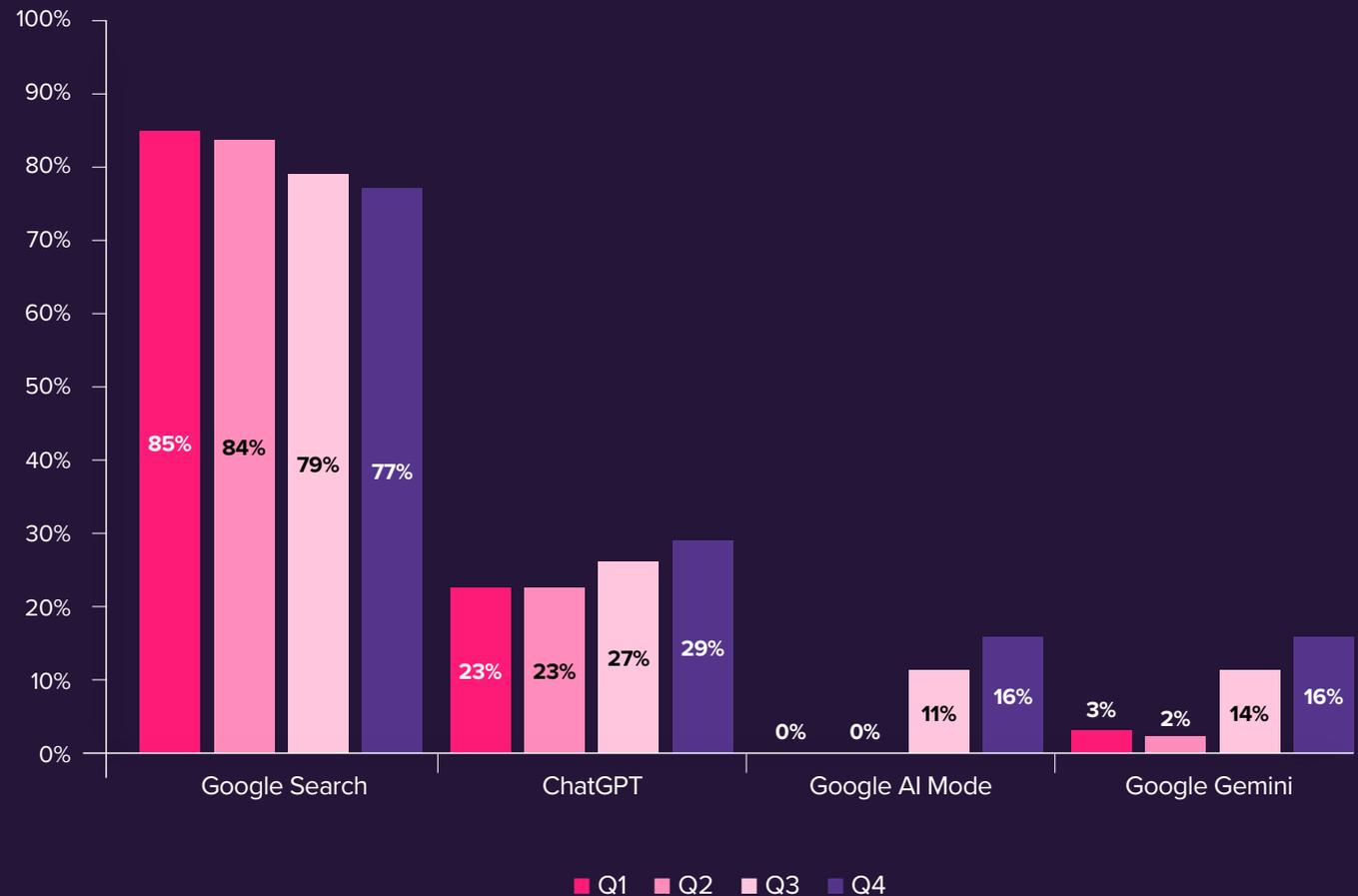
# Google Search use is steadily declining, and it's changing how your customers find you.

Now we have a full year of data, we can see some interesting trends that have been consistent quarter-on-quarter.

Google Search does appear to be in steady decline, despite still holding a significant advantage over second-placed YouTube.

Conversely, ChatGPT has seen a QoQ steady increase and is now used by just under 30% of respondents.

Google AI mode and Gemini have also seen increases QoQ, although Gemini's figures are inflated as the first two surveys labelled it 'Bard', which was already a retired branding.



Q1. What online tools, if any, do you use to search regularly?,  
n=8000 | Reflect Digital SearchPulse Q4 2025

# Strategic insight.

Users aren't leaving Google, they are leaving the 10+ link SERP to experience faster, conversational AI summarised experiences. The main goal is now no longer a click through to your website, but to be visible within the AI answers.

## 🔍 | What YOU can do...

Future proof your content for AI answers. Think about structured data across your content - and focus on **E-E-A-T signals**, as authoritative sources are often preferred for AI summaries.



## E-E-A-T: Experience, Expertise, Authoritativeness, & Trustworthiness.

It's a framework used by Google to evaluate the quality of content and websites.

Content that demonstrates real-world experience, expert knowledge, credible sources, and overall trustworthiness is more likely to perform well in search.



# ChatGPT and Gemini are democratising GenAI use.

**ChatGPT and Gemini** are becoming more accessible.

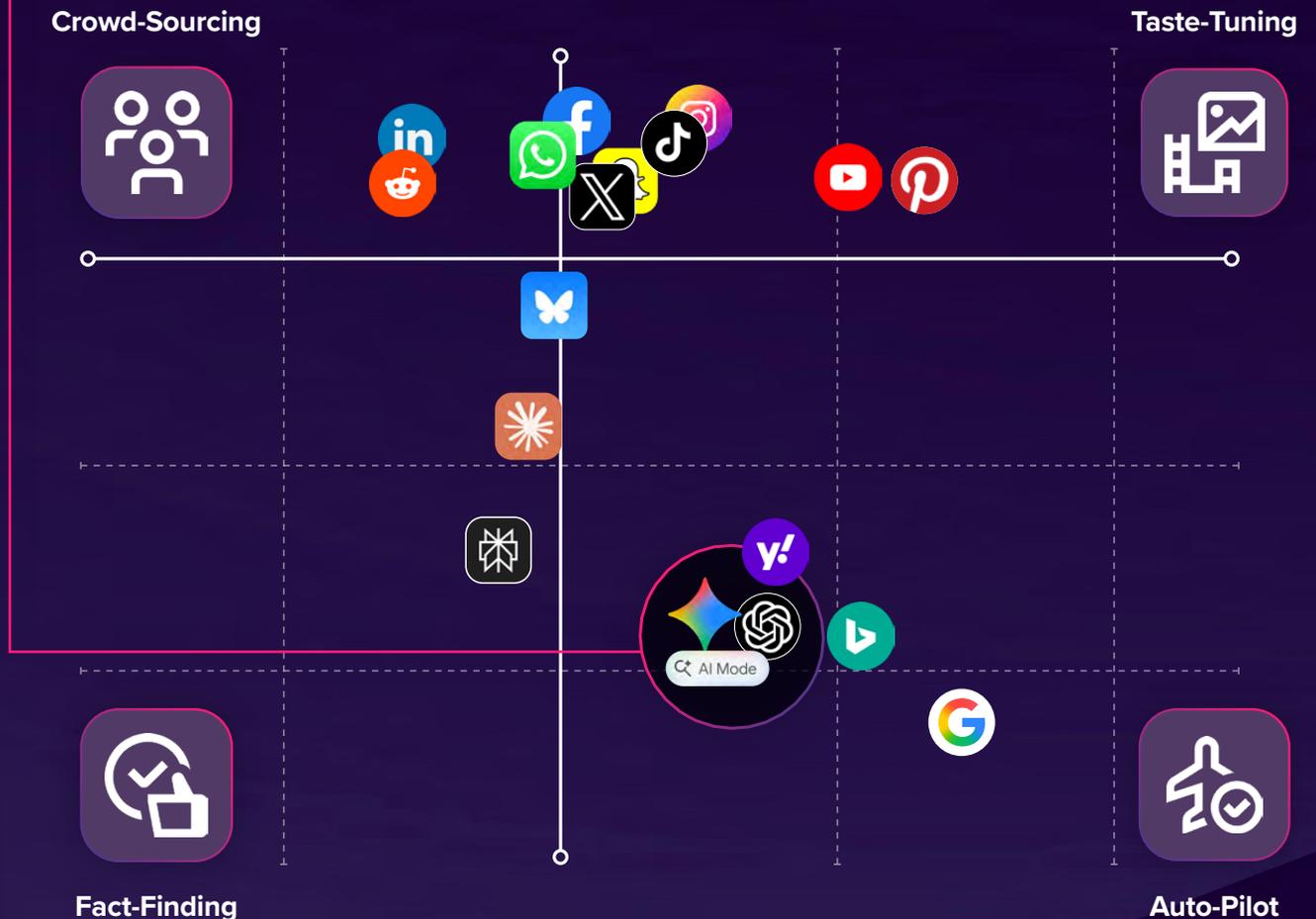
Users of these 'Mainstream AI' platforms are recognising that they get search results faster and are getting a more personalised search experience.

With more use and familiarity that AI will provide personal responses, it's likely that users will also consider these AI platforms on more 'personal' terms and become more trusting of these platforms.

**Visibility in ChatGPT and Gemini is therefore becoming more important for brands,** especially for driving awareness for the general public.

Dive deeper into the **Four Human Drivers of Search Behaviour.**

[READ BLOG](#)





### Defaults

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People tend to stick to the 'default' choice and prefer to carry on behaving as they have always done

The **Default Effect** has been one of the reasons the use of Google Search has remained so strong.

As Google Search changes and incorporates more and more AI-generated content, the effect starts to work in the other direction.

Rather than **people moving towards AI**, **AI may be moving towards people** and increasing their usage.

# There is an increasing demand for user-generated information through community platforms like Reddit.

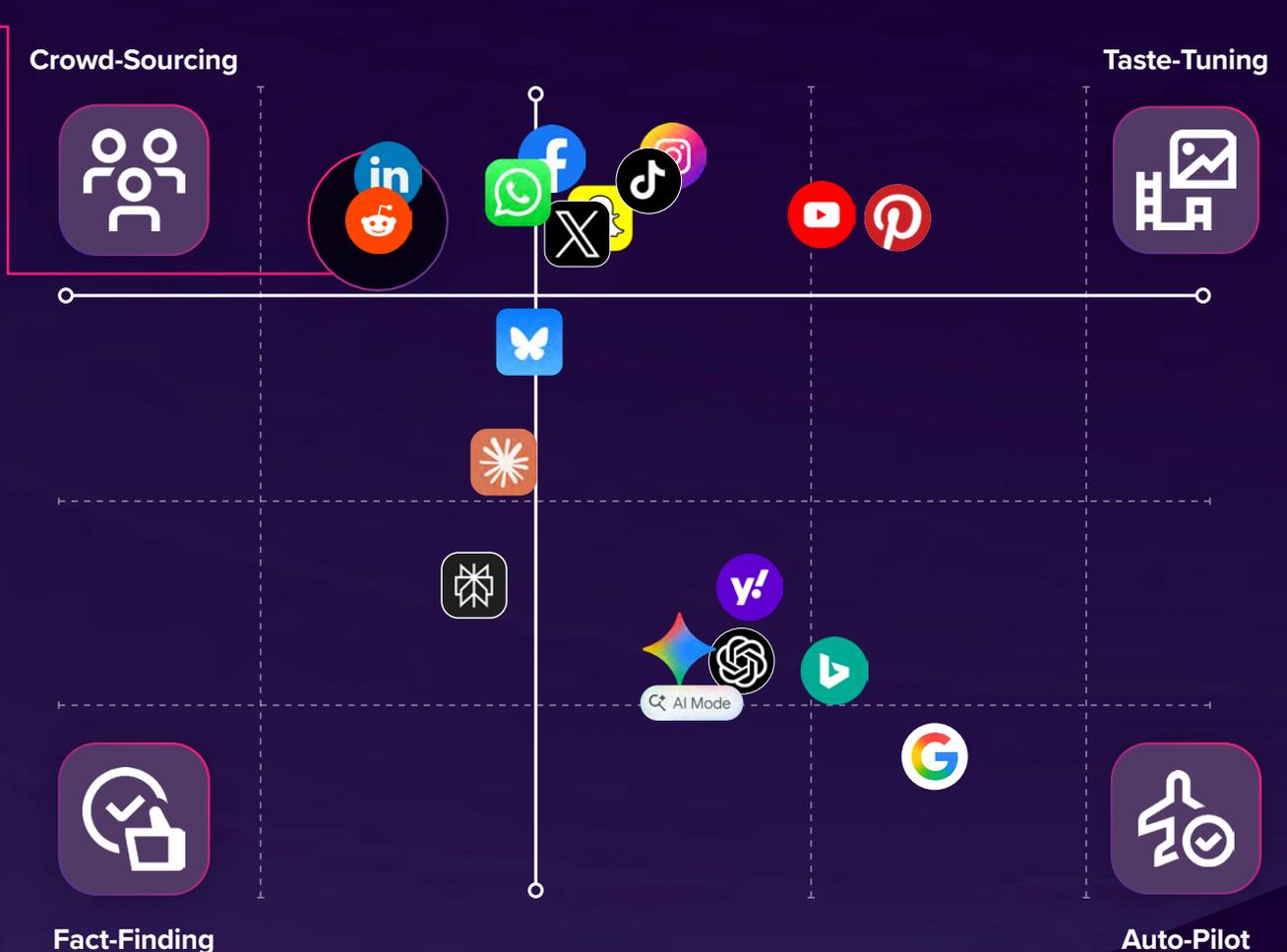
Users are increasingly turning to Reddit for real, peer-to-peer information, making it the fastest-growing social media platform in the UK since 2024 (Ofcom Online Nation 2025)<sup>1</sup>.

At the same time, Reddit remains a contentious space for brands. Its community-first culture means it must be approached carefully. Yet, with growing distrust of AI-generated content, Reddit is becoming an important platform for building trust and validating decisions.

It's also a major source of human data for AI training and one of the most cited sites in AI responses<sup>2</sup>, making it high-impact, if handled right.

1. <https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/online-research/online-nation/2025/online-nations-report-2025.pdf?v=409414>

2. <https://pressgazette.co.uk/news/reddit-claims-top-spot-as-most-cited-domain-in-ai-generated-answers/>



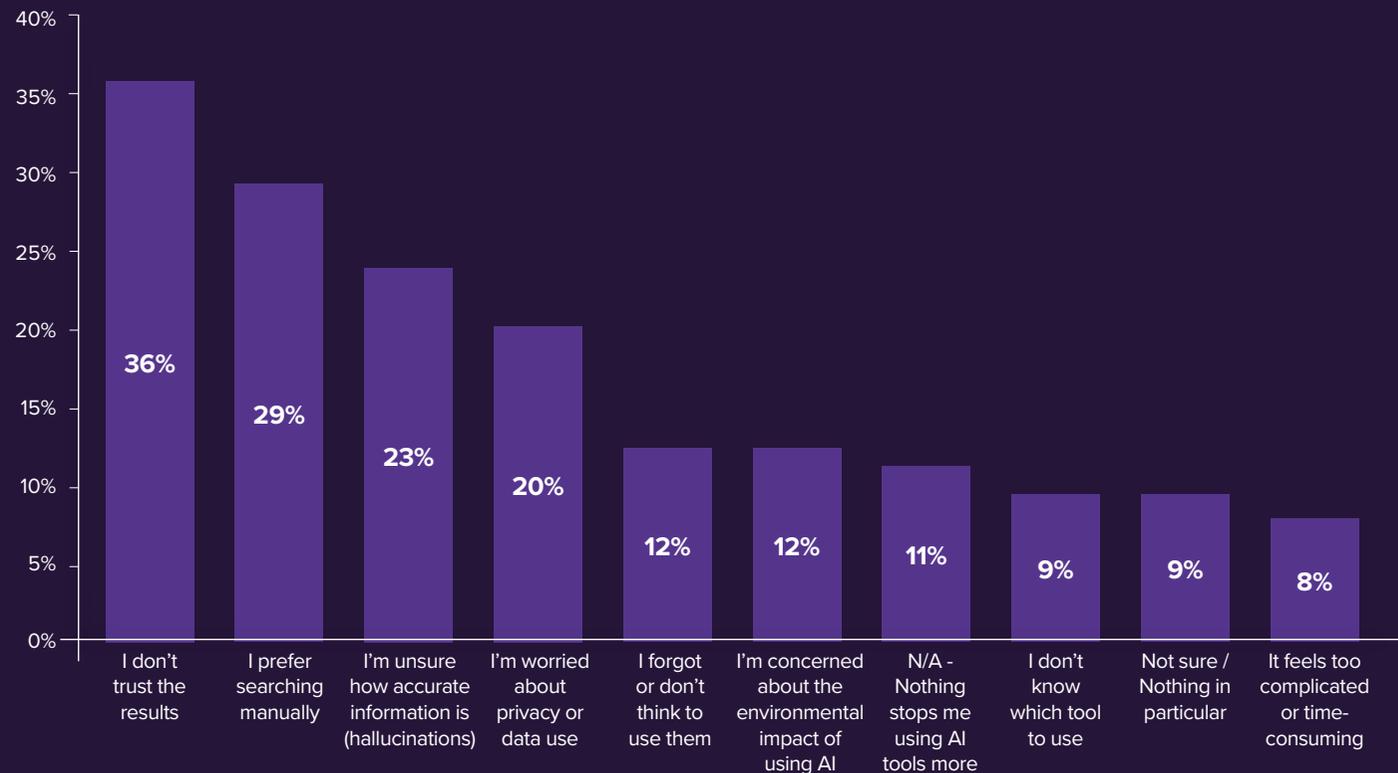
# Despite more people using AI search platforms, trust remains a key barrier.

As we found in previous quarters, **trust** remains the top barrier to AI.

Despite the increasing preference for mainstream AI, there is still a preference for **manual search** for some.

People are also concerned about **accuracy (hallucinations)** and **data privacy**.

When rolling out AI content, it's important to be transparent about how AI has been used.



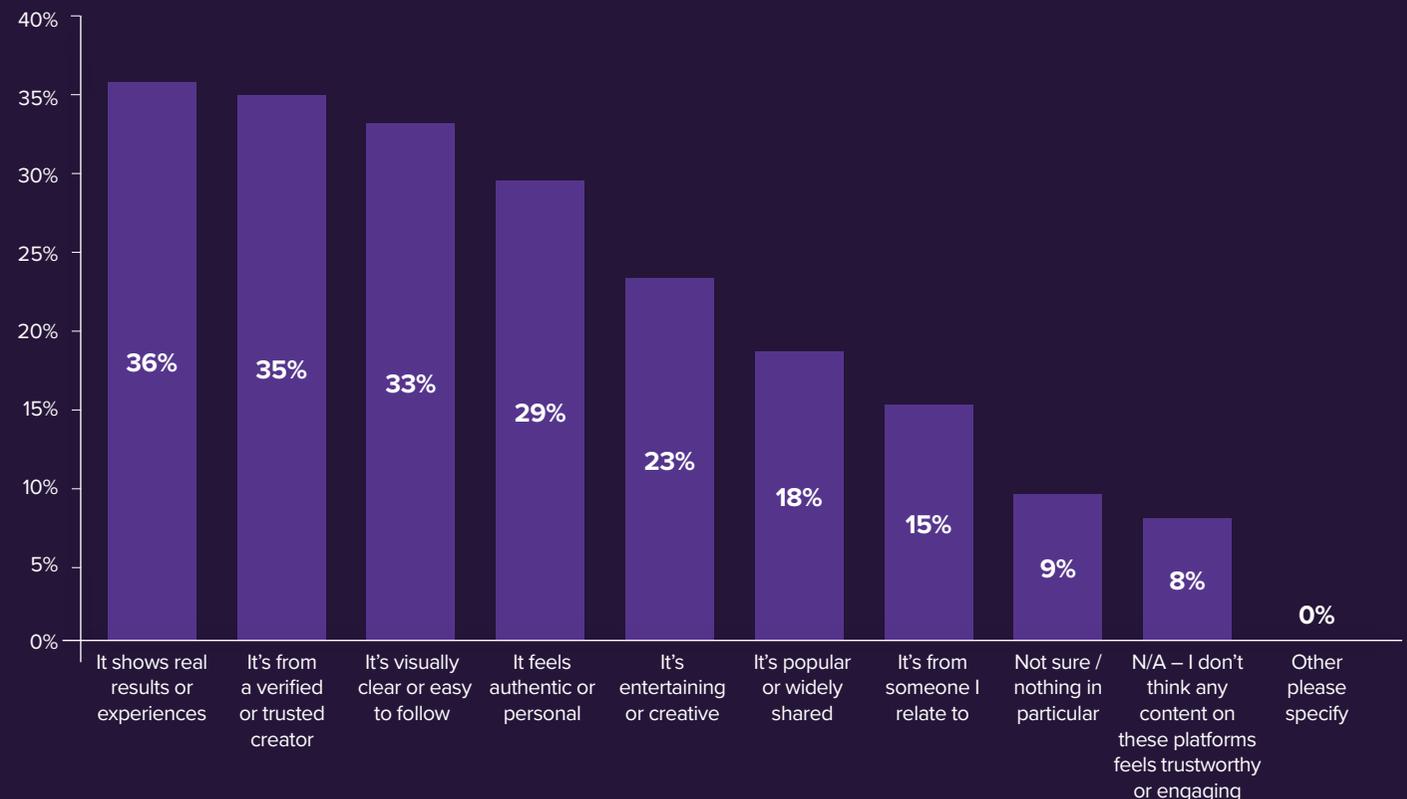
Q4. What, if anything, stops you from using AI tools for searching online or searching online more?  
n=1322 | Reflect Digital SearchPulse Q4 2025

# To build trust, brands should lean into what works on multimedia led platforms.

Showing ‘reality’ is important to be considered trustworthy or engaging. Brands should focus on **authenticity** with multimedia platforms and avoid AI-generated content.

**Creator verification** is also important. Emphasise the credentials and trustworthiness of the people and brands behind the content.

Using **clear and easy to understand** visuals is also important. Taking advantage of design principles in visual formats can set content apart from text-based AI summaries.



Q5. When using multimedia platforms (i.e. platforms that use a combination of text, audio, video) for information or ideas, what, if anything, makes content on these platforms feel trustworthy or engaging?n=1292 | Reflect Digital SearchPulse Q4 2025

# Three ingredients for building trust in the age of AI distrust.

1

## Establish brand credibility through social proof and authority.

When using AI in content and digital experiences, use visual cues for trust such as brand logos and maintain a strong brand design or tone of voice to remain familiar to the audience, especially your customers.

2

## Be transparent about where AI is used, and where it might fall short.

Explain when AI is being used in content and digital experiences, what it can and can't do, and avoid over-claiming or over-promising what it can do for the audience.

Being transparent can empower the audience to make the decision whether to keep engaging or not.

3

## Combine AI with human expertise and support.

Make it easy for the audience to access real people:

For content and thought pieces, ensure that the reader can link the ideas to a real person, someone they can identify with and respect.

For chatbots, reassure customers that they can still reach out to real people who can listen to and empathise with them, through telephone numbers or prompts that can connect them to a live agent.

# Reflect reacts.

We've defined the ingredients for trust, now we must apply a reflective and critical lens of how we use AI in our workflows too. Now that digital environments are quickly becoming saturated with AI content, trust is no longer just about being accurate, that is quickly and easily accessible now. Connection and affinity are just as important, we all seek out a human connection, it's how we function and still needs to be present within brands, as it helps us to verify our trust.

So, the next time you head towards an AI tool, ask yourself this...

## Does this sound/look like 'us'?

When using AI generative tools for your content, you pose the risk of falling into the sea of sameness, looking and sounding just like everybody else. The major risk here is that your unique

brand becomes vague and simply quite generic. Would your audience recognise this content as yours if you were to place it on a competitor's site?

If the answer is no, be sure to stick to your own authentic tone of voice. Maintain a sense of authority that holds its own DNA - make it ownable.

**Tip:** Use AI as the drafter, not the director, when composing content.

## Does the use of this AI content reflect our values?

We've seen huge pushbacks when brands misjudge this, most notably the recent Christmas advert by Coca-Cola, which was completely made with AI. The brand had built up huge affinity, nostalgia, and personal sentiment with this ad over the years.

Critics labelled it as 'soulless,' and 'ill-judged', proving that - while AI might be efficient and even innovative - its efficacy plummets if the audience feels cheated out of human connection with said brand.

**Tip:** Remember the efficacy as well as the efficiency. If the use of AI undermines the emotional connection, or integrity of your brand, the production savings might not be worth the brand damage.

**AI is a great tool and your brand existed before it, let's make sure your brand can still thrive in the future with AI too.**



**Nathan Denny**  
Graphic Designer  
& Creative Strategist

# You have the opportunity to plan the right messenger for different parts of your brand story.

## Brand



### Your voice

What you stand for and want to be remembered for.

## User Generated Content



### Their voice

What your audience is saying and sharing about you.

## Influencer



### Trusted voice

People who add credibility and humanise your brand story.

## Media



### Amplified voice

Platforms and publications that extend your reach and authority.

# Strategic insight.

Human credibility is the clear opposite to AI distrust.

The more people use AI to generate cookie cutter content that feels very impersonal, the more obvious it is that genuine, human led content will skyrocket in performance.

## Q | What YOU can do...

Amplify User Generated Content and social proof by leaning into raw, authentic human voices, which could include your own employees.

Subject matter experts and real team members build far more trust than polished celebrity content.

**Your budget should go towards credibility and genuine expertise, not fame.**



# Key takeaways.

1

## Optimise for AI-driven answers

Use structured data and focus on E-E-A-T signals to ensure your content is authoritative and trusted by AI and search platforms.

2

## Define your messenger strategy

For every piece of content you plan you have a choice to decide how it reaches your audience. Think about the messenger as being as important as the platform itself.

3

## Allocate your budget wisely

Invest in credibility and genuine expertise, not just fame, to strengthen trust and drive action.

**As we pass the threshold this quarter, we also need to start thinking about trusting agents to research and buying for people.**

Check out Becky's article for Search Engine Land.  
**Your Next Customer Might not be Human.**



**Becky Simms**  
CEO & Founder,  
Reflect Digital

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# Our prediction for Q1 2026.

## From searching to transacting, we'll see the rise of delegated choice.

Let's be real: the disruption isn't coming; it's already here. Our Q4 data confirms we've smashed through the adoption threshold a full quarter early, **with 52% of users now utilising AI tools regularly.**

I predict that Q1 2026 will be the tipping point where this familiarity moves into action. That means shifting consumer behaviour from "help me find" to "buy it for me".

This creates a new battleground I'll call "Delegated Choice." The fight is no longer just for the SERP; it's for the "decision gate," where AI agents filter the noise and present a single, vetted option for human sign-off.

If you aren't the first result picked by the agent, you are effectively invisible.

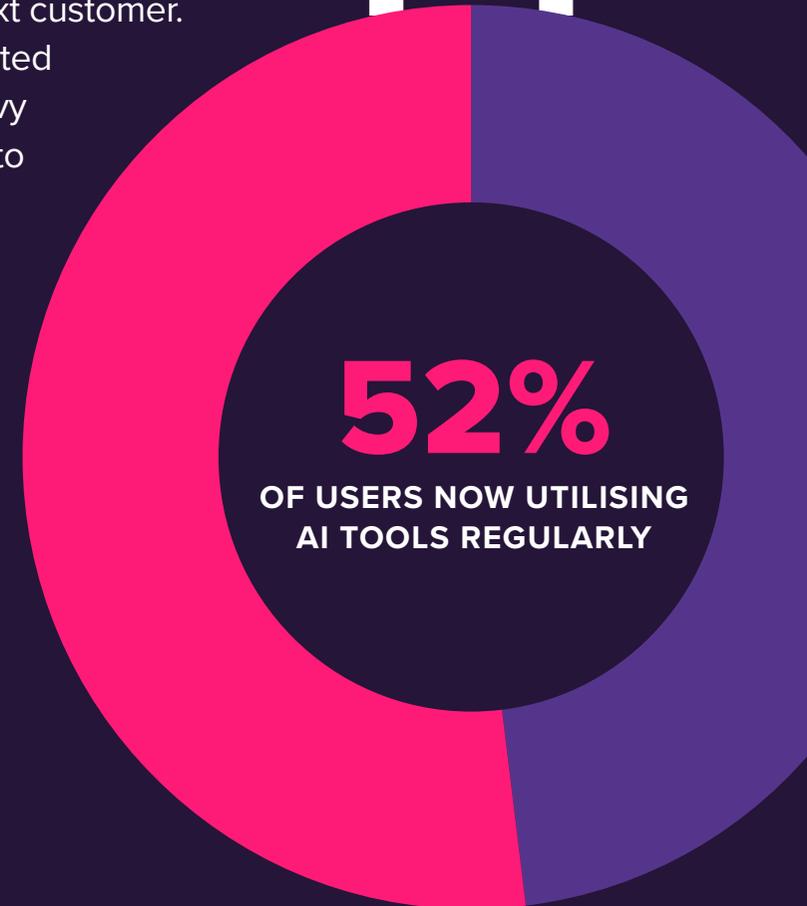
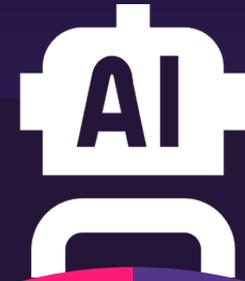
## The biggest risk right now?

You might be blocking your next customer. Our research shows that outdated bot protection and friction-heavy checkouts are causing agents to abandon sites immediately.

To capture this revenue, brands must urgently move to becoming "agent-ready," optimising their infrastructure to welcome the non-human buyer.



**Azeem Ahmad**  
Strategy Director



# What now? Don't let the competitors find your customers first.

Search behaviour isn't shifting in one predictable way. It's fragmenting across platforms, formats, and moments of intent, and it does so differently for every industry and audience.

Speak to our Strategy Director, Azeem, to see how we can create a SearchPulse report tailored directly to your audience's needs and secure your search advantage - before your competitors!

[BOOK A MEETING](#)



searchpulse

**Azeem Ahmad**  
Strategy Director



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## Reflect Digital is the digital marketing agency your customers will thank you for hiring.

Putting our clients' customers first, we work closely with ambitious global brands and eCommerce businesses who are looking to better understand their audience's motivations and evolving search behaviours.

Our strategies blend behavioural science, AI-powered insights, and marketing creativity to deliver next-generation search experiences. We believe in designing for emerging behaviours, not just today's best practices.

In short, we help businesses move beyond siloed channels to a place where the right message meets the right person at the right time, in a way that builds trust, nudges action, and drives growth.

Since we were founded in 2011, we've received many awards and recognitions, including **Agency of the Year 2024**, **Employer of the Year 2025**, **Campaign's Best Places to Work 2025**, and **Best Integrated Campaign 2024**, among others.

Demonstrating both our commitment to our team and delivering truly exceptional campaigns for our clients.





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