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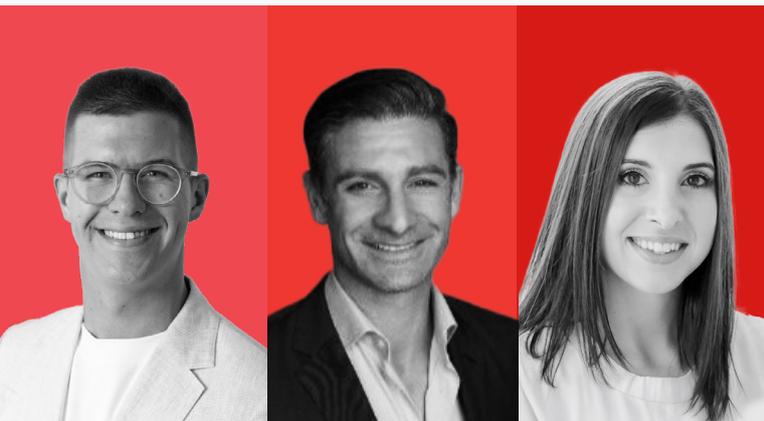
evolving search journeys

the new consumer path to
purchase

contents

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Written on behalf of the
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search is evolving, it's not dead.

In hindsight, the traditional path to purchase in search was rather simplistic. Consumers would use 'generic' keywords when they enter category research and 'brand' terms for when they are ready to purchase.

That era is now over. Propelled by advancements in AI and changes in consumer behaviour, Search has become intelligent, multi-modal and now, even agentic. The singular act of "searching" has become personalised based on each consumer's search behaviour and habits. Category research can now begin with a top of mind branded search or even through a photo. Consumers ready to make a purchase can begin with a long query based search of their exact product needs. Those seeking more granular information, are able to converse with search and go even deeper for information and understanding for what they need next.

In its place however, is a complex path to purchase which is messier and more difficult to manually predict. Another factor in the evolution is that search 'engines' are quickly becoming driven by AI and Large Language Models (LLMs) which have a completely new and different way of interpreting and representing brands in search results. From an SEO perspective, content which worked solely in the past, may need to be partnered with enhanced data extraction, to support the LLM-based search based results.

The path to purchase is messier than ever.

The search landscape is undergoing a fundamental shift as AI and LLMs become deeply embedded in the customer journey, redefining the traditional path to purchase. Consumers are no longer relying solely on traditional searches for discovery. We're at the convergence of several changes:

- > **Changing Complexity** - The conversion journey is increasingly complex with most online conversions involving multiple touchpoints and multi-modal journeys
Changing Channels - Search is no longer isolated to traditional search engines, instead we're seeing the total ecosystem of Search grow via traditional search, social search, LLMs and AI Overviews.
- > **Changing Behaviours** - through the use of AI Overviews and LLMs we're seeing longer, more conversational search queries that are complex and nuanced. We're also seeing diversification of search through generational shifts. Data from Similarweb suggests 50% of LLM users are between the ages of 18-35, demonstrating the different touch points audiences are turning to within their research and buying journeys.¹
- > **Changing Technology** - advances in technology can provide alternate ways to reach consumers and offer more options in the path to purchase. This is primarily through multi-modality such as video, image and voice, creating immediate shoppable moments.

Shopping-related chats can significantly increase the likelihood of purchase soon after the interaction, AI-assisted journeys often convert more quickly, and ads integrated within AI assistants show higher relevancy scores than traditional formats. These patterns align with wider industry data showing that multimodal, conversational experiences are reshaping consumer expectations across platforms.

There's growing industry chatter that "search is dead", however the idea that over 5 trillion searches annually ² and still growing from Google alone, would vanish overnight is simply untrue. Instead, **search is undergoing a seismic transformation** in how consumers gather information and solve our innate curiosity as humans. For more than 20 years, the path to purchase online followed a relatively linear path driven by traditional search engines.

Now, that model is evolving rapidly, shaped by AI, new platforms and changing consumer behaviors. Search is evolving, expanding across platforms, and becoming more conversational, visual, and intuitive than ever before. The search journey is no longer linear, it's dynamic. Research from Microsoft finds that 3 in 4 users say AI assistants complement traditional search versus replace it. ³

Agentic search is no longer a distant prospect, it is already live in the US, where consumers can complete restaurant bookings via OpenTable and purchase tickets through StubHub and Ticketmaster directly in AI mode. While still nascent, these real-world integrations highlight how AI-driven agents are starting to move from simply suggesting options to directly facilitating transactions. For brands, this shift underscores the urgency of ensuring that sites and feeds are structured in ways that AI agents can easily read, act on, and transact against.

search is diverse and visual.

One of the biggest fundamental changes in search behaviour over the last 5-10 years which has impacted the path to purchase has been the phrases and keywords we actually use to search. The era of the two-to-three word keyword is now being replaced by a new conversational and natural dialogue between humans and machine. This is not a niche trend, this is the new normal.

This is only being accelerated by user adoption of LLM's and natural language processing (NLP). As consumers become conditioned by their experience with generative AI platforms like ChatGPT, Microsoft Copilot and Google's Gemini, they will in turn become more comfortable and confident in using natural language when they search. We also see that Search is moving from Information to Intelligence.

Future search will deeply understand your intent, context, and nuances, **not just the words you type**

Future search will deeply understand your intent, context, and nuances, not just the words you type. Leveraging advanced AI, it will provide highly relevant and personalised results, anticipating your needs and delivering precise answers even for complex, natural language queries. Think of it as having a truly smart assistant that knows what you're looking for, even when you're not entirely sure how to ask.

While the shift to conversational search is significant, another profound impact on the path to purchase in search has been the shift from text based results to visual results. This is part of the next evolution of Search as it becomes multi-modal. The consumer journey has now become a rich experience driven by visual media. It's no longer just about what you type and say, but also about what you see. This is driven by consumers' overwhelming user preference for visual content and AI's ability to interpret and understand video and visual content.

As discussed in our previous paper, [Social Search: The Discovery Revolution](#), social and video media is also quickly becoming a visual search medium with 24% of people now saying they primarily use social and video media to search online.

Within Google and Microsoft Search environments, products like AI overviews, featured snippets, organic shopping results, image packs and video cards are all examples where the SERP's have been transformed from text to visually diverse and rich media environments.

the new path to purchase.

With the emergence of LLMs and the rise of social search we're seeing search behaviour become platform agnostic, additionally we're seeing more complex queries emerging. Whilst there is greater usage of LLMs during the discovery path to purchase, data shows ⁴ that people who have conducted research on platforms like ChatGPT are still more likely to return to search for their identified brand to conclude their purchase.

This means that with these increasingly complex paths to purchase, digital marketers need to adapt strategies to ensure content is not only keyword-optimised but also structured and contextually rich enough for generative engines to understand and surface when audiences are conducting their research phase on these platforms, as well as ensuring that content is fit for channel for those audiences searching via social platforms.

Integrating Generative Engine Optimisation (GEO) is no longer optional, it's vital for making sure your content is readable, indexable, and persuasive across new AI-driven surfaces. This also elevates the importance of high-quality onsite and offsite content, which together fuel paid search effectiveness by enabling AI-powered ad formats to dynamically pull relevant assets in real time. Marketers should consider thinking about content strategies holistically, blending SEO, GEO, content marketing and paid search strategies to ensure brand visibility across both traditional SERPs and the emerging AI and social interfaces guiding customer decisions.

At the same time, the fundamentals of good content remain central to discoverability and brand resonance. Even as SEO evolves into GEO and AI-native search surfaces diversify, quality content that audiences want to engage with continues to underpin effective strategies. Rich, relevant, and authoritative information fuels AI systems as much as it supports human users reinforcing that while technology changes the mechanics of discovery, trusted content remains a constant foundation of effective search experiences.

So, is Search 'dead'? Far from it, however, it is evolving at a pace that we have not seen in its 20+ year existence. Search still represents a huge opportunity and understanding this new landscape is critical for brands to survive and grow in an AI-native world.

The modern consumer journey is no longer a linear path down a list of links on the search engine results page (SERP), instead it's a fluid, conversational, and increasingly visual experience across a diverse range of platforms and user experiences. Understanding this new landscape is critical for brands to survive and grow in an AI-native world.

implications and actions for agency and brands.

These insights also point to the importance of designing for natural language interaction and multimodal discovery, building modular AI-ready assets, and using automation tools to adapt creative and targeting in real time. Marketers should optimise for a diverse set of search and discovery environments without relying too heavily on a single provider's ecosystem.

The new consumer path to purchase in search is already creating a large impact on brands who are not set up for success for this new era. To be found, considered, and chosen in this new AI-driven landscape, brands must look beyond what has worked in the past and start to re-think their content strategies, front end experiences and back-end data infrastructures.

Here are 5 implications of this new era and actions for agencies and clients to discuss and incorporate in their strategies moving forward.

1. **Content built for SEO now needs to be re-strategised for how it performs in Generative Experiences**

ACTION - Conduct a comprehensive audit of existing content to identify gaps and opportunities for Generative Engine Optimization (GEO)

PRIORITY - High

2. **With diversified search entry points, brands need to show up in more environments, more often.**

ACTION - Develop a “fit-for-channel” content strategy that extends beyond traditional search engines. Invest in creating and optimizing visual content for platforms like YouTube and social media platforms like TikTok.

PRIORITY - High

3. **Zero-click Search is on the rise in this new AI-driven landscape**

ACTION - Redefine content success metrics to account for information consumption without website clicks. Focus on optimising for featured snippets, AI overviews, and direct answers.

PRIORITY - High

4. **For Retail & eCommerce brands, the importance of quality product feeds is only increasing.**

ACTION - Ensure product information is comprehensive, accurate, and frequently updated with high-quality data, even for fields that were previously “optional” such as materials or patterns.

PRIORITY - High

5. **Agentic AI-driven search has arrived in early forms and, though still nascent, is set to further disrupt purchase paths.**

ACTION - Focus on making your website readable and actionable for AI agents that will increasingly perform tasks and make purchasing decisions on behalf of consumers.

PRIORITY - Medium

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