



aFactor

RESEARCH & PERSPECTIVES

The Future of Search

Will AI replace search engines, or transform them from within?

Evidence, expert views and scenarios for 2028 and 2031



Prepared by aFactor

Research cutoff: 1 October 2026

Global outlook, with a dedicated India perspective

EXECUTIVE JUDGMENT

Search survives. Its interface changes.

The most probable future is a combination of conversational answers, visible sources and task completion, delivered by both search engines and standalone assistants.

Will large language models take over?

They are likely to take over a growing share of the interaction: asking, clarifying, comparing and summarising. That does not mean they replace the indexes, live data, publishers and transaction systems needed to produce useful answers. Nor does it imply that standalone chatbots capture every user journey.

Will people stop going to search engines?

Some tasks will move. The evidence does not support a near-term, universal abandonment of search engines. Many users already combine both approaches, while incumbent search products are themselves becoming conversational. The distinction between an AI assistant and a search engine is becoming less clear.

Is Google at risk?

Yes: it could lose valuable starting points, control of commercial recommendations and some profit per task. But distribution, search infrastructure and the ability to add AI to an established habit give it a strong route to adaptation. Revenue resilience today is evidence of capacity to compete, not immunity from disruption.

aFactor base case

By 2031, AI-mediated experiences could lead about three-quarters of general-purpose information-seeking journeys in our central planning scenario. Much of that activity would still occur inside search engines. The split is aFactor judgment, not measured market share or expert consensus.

Sources: [3], [7], [9], [38]. Forecast definitions and alternatives: pages 28-30.

GUIDE TO THE REPORT

A market in transition

Read pages 2 and 28-31 for the principal judgment and forecasts; use the evidence chapters to examine the basis for them.

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Charts use published observations unless explicitly labelled as aFactor scenarios. Reference numbers are clickable in the source register.

Five measures that must not be confused

The strongest conclusions come from triangulation. No single public dataset measures all search-like activity across engines, assistants, apps and devices.

Measure	What it tells us	What it cannot establish
People / reach	Whether someone uses a service.	How much searching they move from one service to another.
Queries / prompts	The number of interactions counted by a provider or panel.	Comparable task volume: one journey can generate many prompts or machine queries.
Information-seeking journeys	A person trying to answer one question or complete one discovery task.	A global share today: no harmonised public series was found.
Website referrals	Visits sent to another website.	All demand satisfied inside an answer, app, map or shopping surface.
Revenue / profit	Commercial value captured by a provider.	User preference or volume independently of prices, ad load and costs.

The report uses three distinct evidence labels

Observed: surveys, tracked behaviour and experiments. Company-reported: financial results, usage claims and product policies. aFactor analysis: our interpretation and conditional scenarios. Expert opinions are identified separately; they are not treated as measurements.

FORECAST BOUNDARY

Our shares refer to the primary interface in general-purpose information-seeking journeys. They exclude creation-only chats, machine-generated searches and discovery wholly inside specialised social, retail or work apps. This keeps the comparison coherent, while leaving a meaningful part of total discovery outside the model.

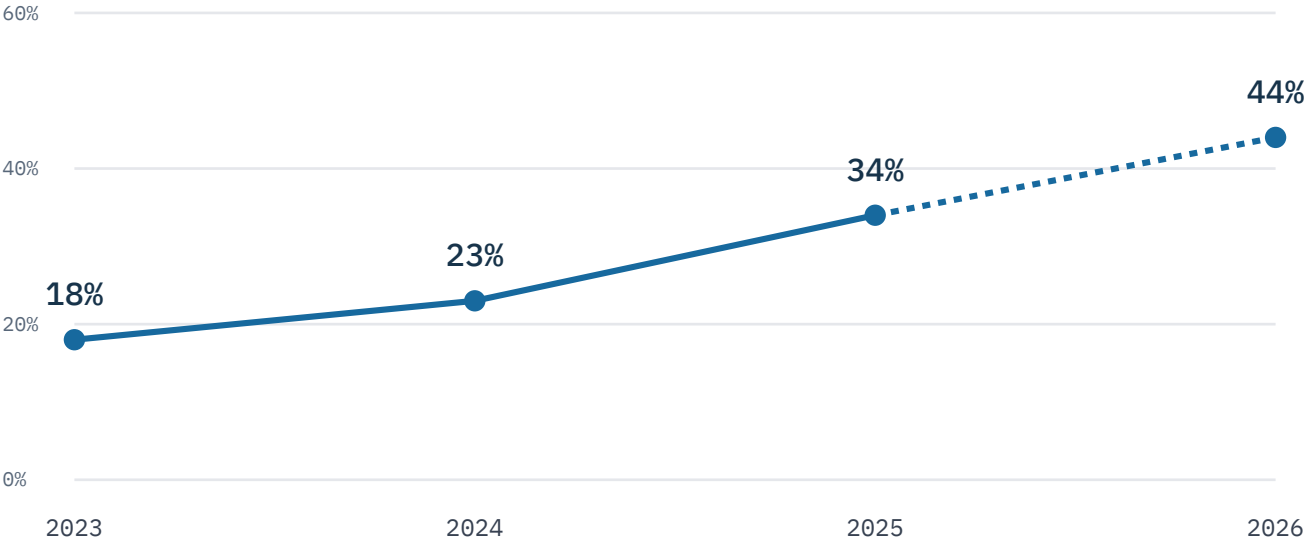
Sources: [1], [4], [5], [6], [7]. This taxonomy and forecast boundary are aFactor analytical choices.

01 / EVIDENCE

AI use is becoming a mainstream habit

Survey evidence shows rapid adoption. It does not show that an equivalent proportion of traditional searching has disappeared.

US ADULTS WHO HAVE EVER USED CHATGPT



49%

use any AI chatbot

24%

use chatbots daily

42%

use them to find information

Pew surveyed 5,119 US adults in February 2026. The dotted segment marks a question-wording change, so the series should be read as evidence of growing reach, not a perfectly consistent adoption index. All three cards use US adults as the denominator. [1]

INTERPRETATION

Trial, daily habit and search substitution are separate milestones. A user can adopt AI for explanation or writing while continuing to use Google for navigation, local services and verification. The next decisive measurement is the share of tasks they move.

Sources: [1]. US, not global. Survey fieldwork precedes publication by roughly four months.

People are adding AI before abandoning search

Overlapping use is a strong sign of coexistence, but it cannot tell us how the allocation of tasks is changing.

95% of ChatGPT users also used Google

Similarweb estimates for May 2026; also about 95% in September 2025. [3]

What coexistence actually means

A person may ask an assistant to compare approaches, use Google to locate an official page, then visit a retailer to check stock. Counting that person as a user of both services is correct. Inferring that neither service has lost any task share would be incorrect.

Semrush signal	Reading	Caution
34.5%	Share of observed ChatGPT prompts with web search enabled, February 2026.	This is a tool-use proxy, not the share of prompts that seek information.
21.6%	Google accounted for this share of outbound ChatGPT referrals in February.	Denominator is referrals, not all ChatGPT prompts or sessions.

aFactor interpretation

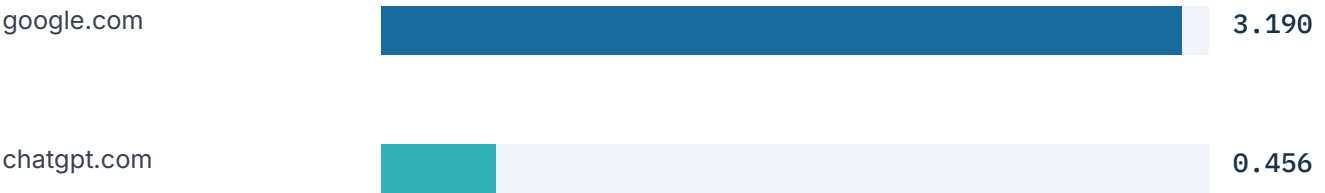
The likely transition is task-by-task. Explanatory questions move readily to conversation; verification and destination-finding often remain elsewhere. Google can lose an early research step while retaining the final commercial click, or the reverse. Both matter commercially.

Sources: [3], [4]. Commercial measurement providers; panel definitions and product instrumentation differ.

Search still has a much larger audience

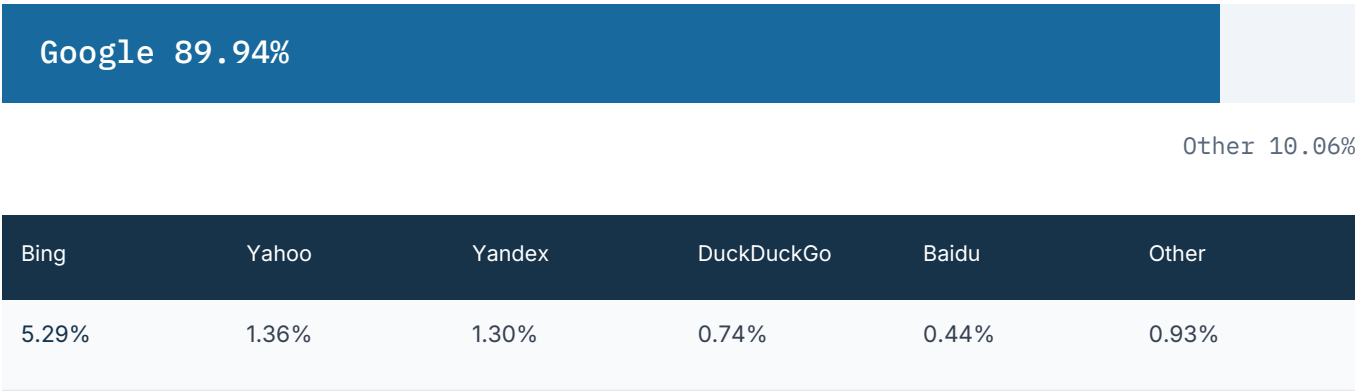
Comparable audience estimates are more useful than juxtaposing one company's weekly users with another company's monthly users.

MONTHLY UNIQUE WEBSITE VISITORS, BILLIONS



Average, December 2025-February 2026. DataReportal compilation of Similarweb estimates. Values measure people visiting these websites, not searches or answer quality. [5]

GOOGLE'S POSITION AMONG MEASURED SEARCH-ENGINE REFERRALS



Statcounter, worldwide, provisional September 2026 snapshot retrieved 1 October. Closed assistant answers are not included in this engine-referral denominator. Google's approximately 90% here is therefore not its share of all information-seeking. [6]

THE IMPLICATION

A large installed habit makes rapid incumbent adaptation plausible. It also means relatively small percentage shifts can represent substantial traffic and revenue. Neither audience scale nor engine-referral share provides a clean forecast of future conversational search.

Sources: [5], [6]. Website and app audiences overlap and must not be added. Statcounter values may revise.

01 / EVIDENCE

The click is under more pressure than the query

An engine can keep answering questions while sending fewer visitors to the websites that supply the information.

CLICKS ON A TRADITIONAL SEARCH RESULT



1%

clicked a source link
inside the AI summary

Pew observed browsing by 900 US adults in March 2025.

Standard-result clicks occurred on 15% of visits without an AI summary and 8% with one. Source links inside summaries attracted a click on 1% of visits with summaries. [2]

A material signal, with an important limit

This is an observational comparison. Queries that trigger summaries differ from queries that do not. Results were reconstructed in April, rather than captured exactly as each user saw them in March. It would be wrong to turn the difference into a universal, causal estimate of publisher traffic loss.

BUSINESS CONSEQUENCE

The risk is not simply fewer searches. It is fewer visits per answered question, combined with greater concentration of the remaining referrals. A publisher, advertiser and search provider can therefore experience very different outcomes during the same transition.

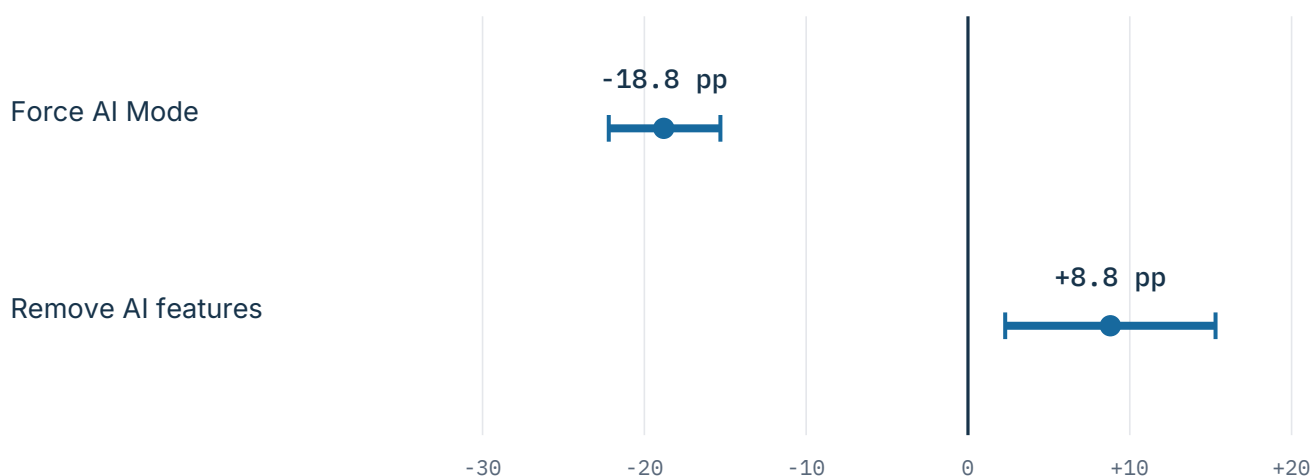
Sources: [2]. The 7-percentage-point difference is not a 7% relative decline. No causal claim is made.

01 / EVIDENCE

A field experiment tests what the interface changes

Recent causal evidence strengthens the concern about outbound clicks, while also showing why forced adoption cannot stand in for organic demand.

CHANGE IN CLICKTHROUGH RATE VS. CURRENT GOOGLE EXPERIENCE



Points are estimated percentage-point effects; bars show 95% confidence intervals. Current Google, including its existing AI features, is the comparison condition. [15]

What was tested

Wang and co-authors studied 1,100 US Chrome users over 10 days. The August 2026 preprint reports reduced clickthrough and user friction when participants were routed into AI Mode. Hiding AI features increased clickthrough.

HOW MUCH WEIGHT TO PUT ON IT

The experiment tests one interface intervention, not long-run voluntary adoption or worldwide traffic. It says little about factual accuracy. Treat this preprint as provisional evidence that needs replication.

Sources: [15]. Preprint; historical experiment, not a live audit of all October 2026 products.

What we can conclude today

The signals are consistent with growing AI adoption and declining outbound attention. They are less conclusive about total search demand or the eventual winner.

Proposition	Assessment	Why
AI is becoming part of everyday discovery.	Strong support	Adoption surveys, product rollouts and referral measurements point in the same direction.
Everyone is leaving Google for chatbots.	Not supported	Observed overlap and audience scale are inconsistent with a universal exit.
AI answers can reduce website clicks.	Strong directional support	Observational evidence is reinforced by an early field experiment.
Total information-seeking demand is shrinking.	Unresolved	There is no harmonised measure of tasks, prompts and machine-generated subqueries.
Google's search business is already collapsing.	Not supported	Latest reported Search & other revenue is growing; longer-run economics remain exposed.
Visible citations guarantee correct answers.	Not supported	A 2025 Tow Center news-identification audit found widespread citation errors. It is a historical, task-specific test. [17]
Standalone assistants will dominate by 2031.	Plausible alternative	Would require durable habits, distribution access and reliable commercial execution.

THE CENTRAL DISTINCTION

An interface can lose clicks before its owner loses revenue. A service can gain users without displacing an equivalent number of searches. A model can become more capable without its provider gaining a durable distribution advantage. These are different transitions, with different timelines.

Sources: [1], [2], [3], [5], [7], [15], [17]. Assessments are aFactor synthesis, not a statistical meta-analysis.

The future splits by task, not just by brand

Users choose the quickest credible route to an outcome. Different search intentions therefore migrate at different speeds.

Task	Likely interface	Why it persists or moves
Explain, summarise, brainstorm	Assistant-led	Conversation reduces the effort of reformulating and combining information.
Compare complex options	Hybrid / assistant	Synthesis helps; users still need alternatives, provenance and fresh facts.
Find a known website or document	Results / direct navigation	The desired output is often a destination, not a generated explanation.
Local service, opening hours, stock	Hybrid with live data	Maps, merchant records and transaction feeds matter as much as prose.
News, contested or consequential topics	Hybrid with visible sources	Recency, disagreement and accountability make source inspection valuable.
Buy, book or submit	Agent plus approval	Execution needs identity, permissions, price confirmation and recovery paths.
Discover taste, communities or lived experience	Social / specialist plus AI	Human context and first-hand material can remain the attraction.

This is aFactor's functional assessment, not a measured allocation of current queries. Movement can happen inside Google just as it can happen from Google to ChatGPT, Claude or Grok. A single purchase journey may use several rows.

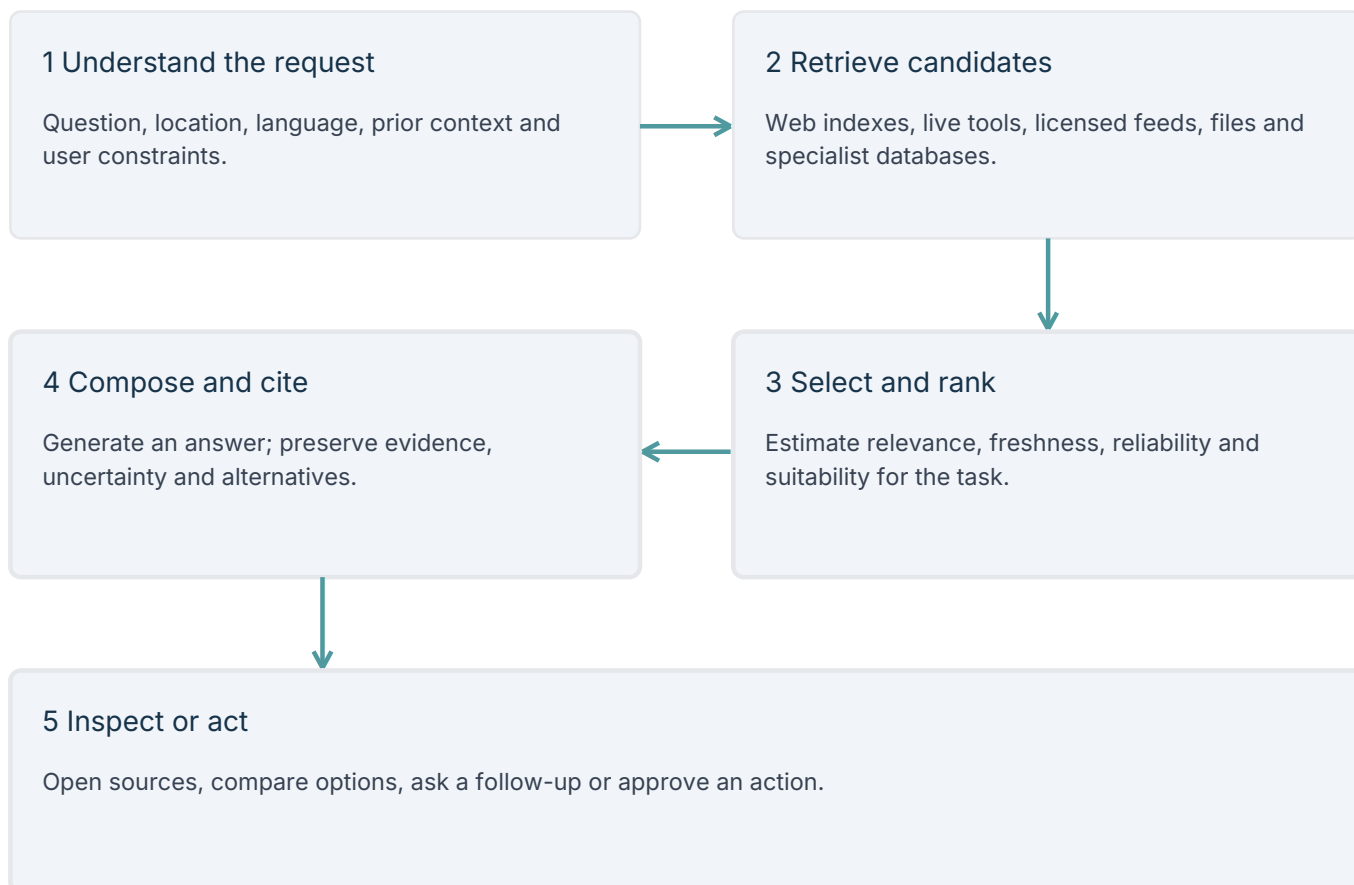
A USEFUL TEST

Ask what the user is trying to obtain: an explanation, a trustworthy source, a range of alternatives, or a completed action. The more a product matches that outcome without adding verification work, the more likely it is to become the preferred starting point.

Sources: [9], [22], [34], [38]. Task allocation and implications are aFactor analysis.

An AI answer still needs a search system

A language model is one component of a larger information service. Retrieval, ranking and source access remain strategically important.



Where the model changes the process

The system may turn one user question into multiple retrieval queries and combine the results. Google describes this as query fan-out. OpenAI's original search architecture also drew on third-party search and direct content relationships. The visible interface can change while the need to find and evaluate current information remains. [34,38]

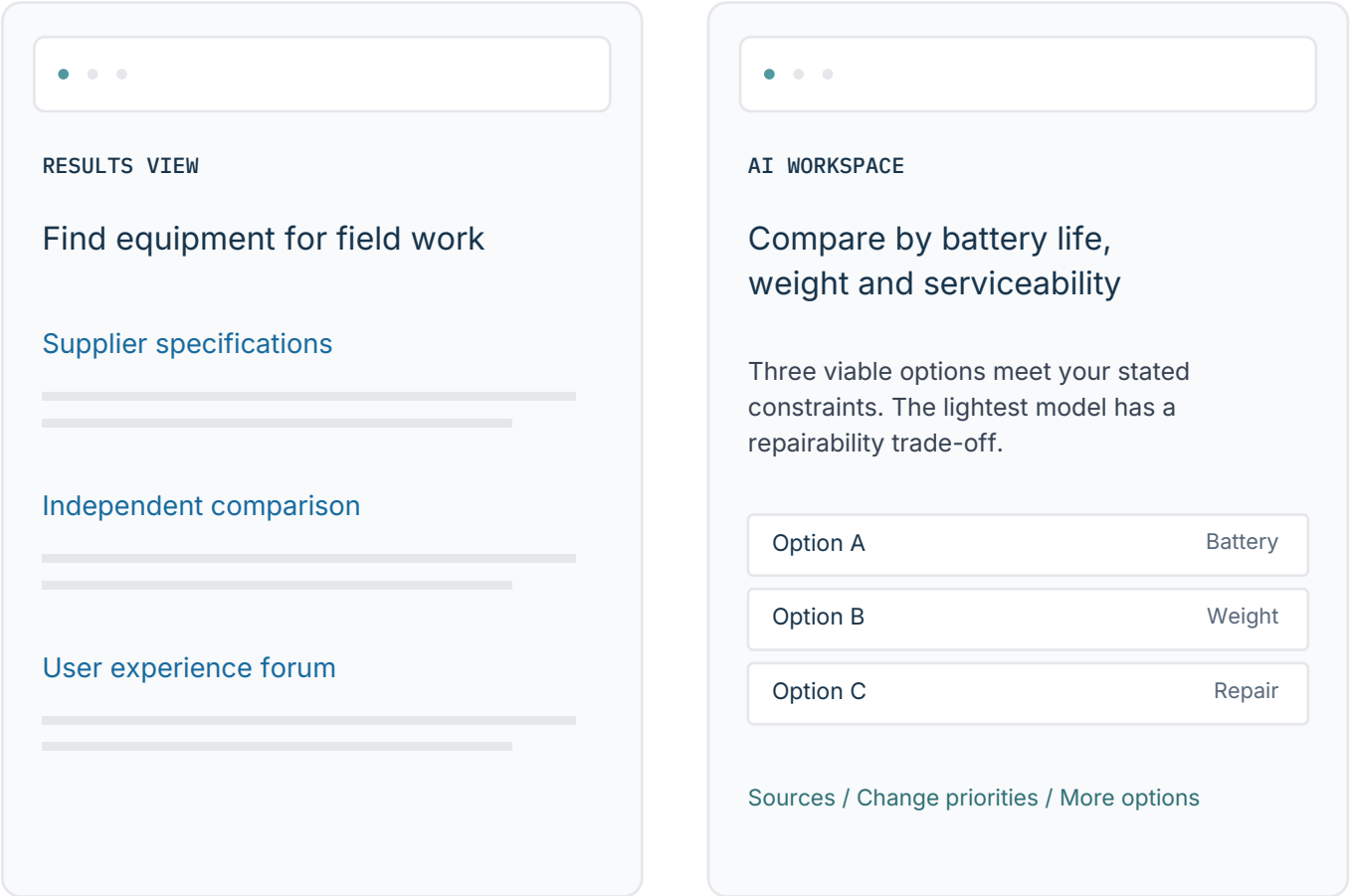
WHERE CHOICE CAN NARROW

Options can disappear before generation: a source may be inaccessible, omitted from retrieval or down-ranked. They can also disappear during synthesis. A citation list reveals some evidence; it does not prove that the candidate set was complete or that every sentence follows from it.

Sources: [34], [38]. Diagram is aFactor's simplified conceptual architecture; actual implementations differ.

From a list of destinations to a workspace

The emerging product combines a useful answer with the ability to inspect sources, change assumptions and continue the task.



Illustrative interface concepts created by aFactor. These are not screenshots or claims about any current product.

The product decision is how much control to expose

A concise recommendation can save effort. It can also conceal why the shortlist was chosen. A better interface lets the user inspect the evidence, alter constraints and expand the candidate set without starting again. More links alone do not resolve the problem if they are difficult to notice or evaluate.

DIRECTION ALREADY VISIBLE

Google's 2026 announcements combine conversational follow-ups with previews, source links and new interactive surfaces. This suggests a hybrid product trajectory. The existence of a feature is not evidence that users notice it, trust it or use it. [9,10]

Sources: [9], [10]. Original schematic; no provider endorsement or simulated performance data.

The next contest is over completed tasks

An assistant that researches, compares and executes can capture more of a journey than an engine that only points to another website.



Constraint	What has to improve
Reliable execution	Current stock, final prices, permissions, authentication and robust exception handling.
User confidence	Clear approval before commitments; records of what was chosen and why.
Commercial access	Merchant connections and data rights that cover a useful range of alternatives.
Economics	The value of a completed task must justify retrieval, inference and support costs.

aFactor expectation

Delegation should expand first where tasks are bounded, reversible and supported by reliable tools. Complex purchases and consequential decisions are likely to retain user checkpoints. Search may become less visible as a separate activity while remaining essential inside the agent.

Sources: [9], [19]. Execution pathway and adoption constraints are aFactor analysis, not a product reliability benchmark.

Experts agree on change, not on the end state

These are published positions, not interviews conducted for this report. Their different incentives and measurement choices explain some of the disagreement.

Voice	Published position	aFactor reading
Alan Antin / Gartner [11]	Predicted a 25% fall in traditional search-engine volume by 2026 as AI and virtual agents expand.	A clear displacement thesis, but difficult to score from the public baseline.
Sundar Pichai / Google [8]	Describes AI as expanding search demand and enabling more complex questions.	Consistent with incumbent adaptation; company claims need independent task-level validation.
Eli Goodman / Semrush [4]	Frames observed ChatGPT use as additional activity layered onto existing discovery habits.	Useful behavioural evidence; the firm also sells visibility and marketing products.
Benedict Evans [12,13]	Emphasises new information filters, product differentiation and distribution over model capability alone.	Helps explain why better models do not mechanically imply one winning interface.
Nic Newman / Reuters Institute [14]	Flags referral risk and the need for distinctive journalism.	A strong ecosystem warning; referral loss is not the same as query decline.
Sinan Aral and co-authors [16]	Historical AI-search comparisons raise concerns about source concentration and information diversity.	Efficiency and breadth can pull in different directions; results are not universal across today's systems.

COMMON GROUND

Discovery is becoming more conversational, and the allocation of attention is changing. The unresolved questions are who owns the starting point, how much value flows back to sources and whether new activity offsets displaced clicks. There is no defensible single expert-consensus percentage for 2031.

Sources: [4], [8], [11], [12], [13], [14], [16]. Positions are paraphrased; preprints and commercial research are identified in the source register.

How to evaluate the headline predictions

A forecast is only testable when its population, metric, baseline and time horizon are clear.

-25%

Gartner's 2024 prediction for traditional search-engine volume by 2026. [11]

Test	Finding
Is the metric comparable?	Engine queries, website visits, outbound clicks and information-seeking journeys are different quantities.
Is there an auditable baseline?	The public Gartner release does not supply the full underlying series needed to reproduce the forecast.
Do current revenue results settle it?	No. Revenue can grow through prices, mix and monetisation even if volume falls.
Does audience overlap settle it?	No. Someone can remain a Google user while moving a substantial number of tasks to an assistant.
What would settle it?	Consistent task-level panel data, plus comparable engine volume over the stated period and geography.

Our assessment

The available evidence does not validate a blanket collapse narrative. It also cannot decisively falsify a volume forecast with an incompletely specified baseline. We therefore avoid replacing one striking prediction with another apparently precise but unmeasurable claim.

FORECAST DISCIPLINE

Ask what was counted before treating query growth or referral loss as proof of substitution.

Sources: [7], [8], [11]. Assessment is aFactor analysis. No claim is made that Gartner's forecast has been conclusively proved or disproved.

Google has a business to defend, and resources to adapt

The latest financial results are inconsistent with a search business already in collapse. They do not reveal the long-run economics of AI answers.

GOOGLE SEARCH & OTHER REVENUE, US\$ BILLION



+16.8%

year-on-year growth

52.8%

of Alphabet Q2 2026 revenue

Calculated from Alphabet's reported Search & other revenue of \$54.190 billion and \$63.271 billion, and Q2 2026 total revenue of \$119.796 billion. Search & other is a reporting category; these figures are not a standalone Search profit statement. [7]

What the results do and do not mean

A growing revenue base can fund product changes, distribution and infrastructure. It also gives Google time to adapt. But advertising yield can conceal shifts in user behaviour, and group-level margins do not disclose the cost of each AI search journey.

THE STRATEGIC RISK

Google could preserve its audience while earning less from a completed task, paying more to answer it, or losing the stage where a shortlist is formed. Equally, better answers and new commercial formats could increase value per journey. The financial outcome depends on this balance.

Sources: [7]. Growth and revenue share are aFactor calculations; rounded for display.

Google's risk is erosion, not inevitable extinction

Its strengths are substantial, but each is being challenged by changes in behaviour, economics or market rules.

Source of strength	What could weaken it	What to watch
Distribution and habit	Users begin complex research in assistants; default access becomes more contestable.	Default-service selection and the share of tasks beginning outside Google.
Search and local infrastructure	Alternative retrieval providers, licensed feeds and specialist data improve.	Freshness and completeness of answers in local and commercial tasks.
Advertiser relationships	Assistants own the shortlist and direct the transaction through another route.	Advertiser returns and spending on conversational discovery.
Ability to put AI inside Search	Interface friction, distrust or crowded commercial answers reduce satisfaction.	Repeat use, task success and source inspection, not rollout announcements alone.
Scale and investment capacity	Inference, content access and distribution costs outpace new revenue.	Value per completed task after all direct service costs.

The more plausible competitive picture

Google remains a major search and answer provider in the base case. Its position becomes less exclusive as users maintain several assistants and specialist services. Winning AI inside Google is economically different from winning all AI activity across the Internet.

A USEFUL BUSINESS EQUATION

Profit from a journey depends on commercial value captured minus the cost of serving, acquiring and supporting that journey. Better models help only if they improve this equation or defend a strategically valuable user relationship.

Sources: [7], [9], [25], [26]. Moats, risk pathways and watchpoints are aFactor analysis; no investment-price forecast is offered.

The competitors are pursuing different positions

Model quality matters, but access, workflow fit, trust and distribution can matter just as much. This is a strategic comparison, not a model leaderboard.

Provider / surface	Position in search	Key uncertainty
Google Search / Gemini	Combines incumbent retrieval and distribution with AI answers and conversational interaction. [9]	Can it keep commercial value and user trust as the interface becomes more synthetic?
ChatGPT	Search is part of a broader assistant experience, spanning research, creation and task execution. [38]	Can a broad assistant become a durable discovery gateway with sustainable monetisation?
Claude	Web-grounded assistance with an explicitly ad-free product position. [21,22]	Can a subscription and enterprise-oriented proposition capture mass discovery habits?
Grok	An assistant with live web-retrieval tools and citation capabilities. [23]	Can retrieval quality, trust and everyday utility sustain use beyond initial access?

The market extends beyond these four

Bing, specialist answer products, browsers, retailer search, social platforms and workplace tools can all retain useful discovery roles. Some win by serving a narrower context very well. Others supply infrastructure that an assistant uses without becoming the visible consumer brand.

WHY A SINGLE WINNER IS NOT THE BASE CASE

Switching between assistants can be easy, while the best service may vary by task. Personal context and workflow integration may create loyalty, but source access and distribution remain separate advantages. Several interfaces can coexist even if underlying models become increasingly similar.

Sources: [6], [9], [13], [21], [22], [23], [38]. Feature scope changes quickly. No comparative accuracy or current model-version claims are made.

Answers are becoming a commercial surface

Payment can fund access, determine ad placement or influence the transaction route. These mechanisms should be distinguished from editorial ranking.

Advertising

Revenue for reaching users during discovery.

Risk: commercial messages look like impartial advice.

Subscriptions

Users or employers pay for capability and access.

Risk: the service still selects sources and applies product priorities.

Commerce / referral fees

Revenue linked to a lead, sale or booking.

Risk: eligible partners define an artificially narrow market.

Licensing / enterprise

Content, data or workflow agreements fund supply and deployment.

Risk: access arrangements shape which evidence is available.

What providers say

OpenAI has expanded ChatGPT advertising and described a September 2026 test of clearly labelled, opt-in Sponsored Agents. Anthropic has publicly committed to keeping Claude free of advertising and paid placements. These are different business positions; neither statement independently establishes that every answer is neutral. [19-21]

WHAT CANNOT BE INFERRED

A brand appearing in an answer is not, by itself, evidence of a payment. It may reflect relevance, popularity, retrieval coverage, partnerships or model behaviour. The useful disclosure is whether money or another material commercial relationship affected inclusion, order or the next action.

Sources: [19], [20], [21]. Tests and policy commitments should not be mistaken for independently audited product behaviour.

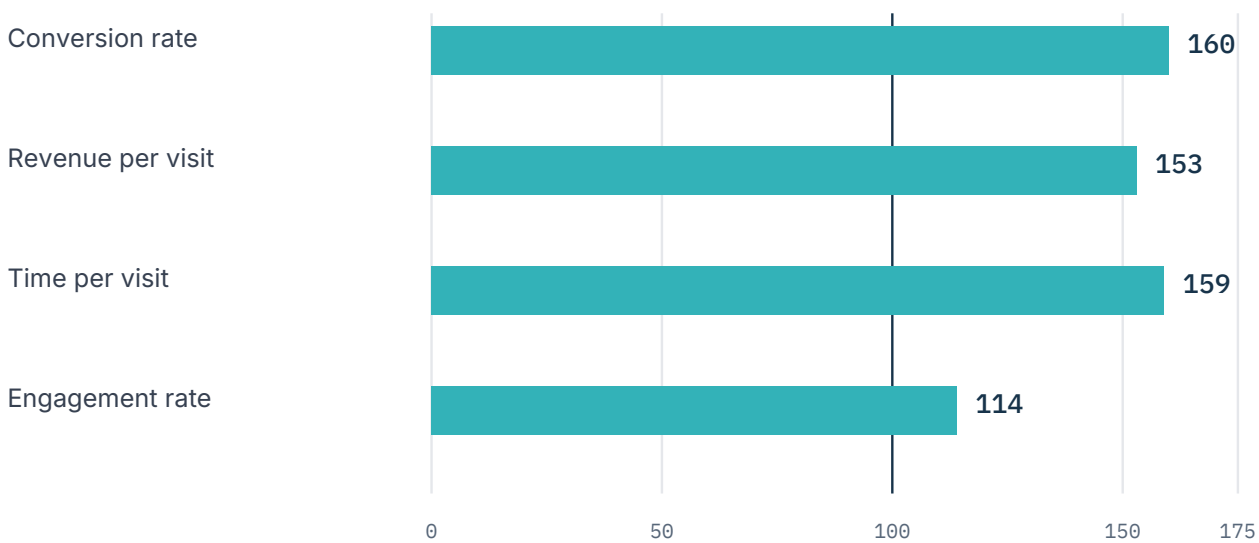
03 / COMPETITION & VALUE

Smaller traffic streams can still carry high intent

AI referrals may arrive later in the decision process, after comparison has already occurred. Their quality matters as well as their quantity.

US RETAIL: AI-REFERRED VISIT OUTCOMES, JULY 2026

Index: non-AI traffic = 100 for each metric



Adobe Digital Insights reports AI-referred retail visits converting at a 60% higher rate and producing 53% more revenue per visit than non-AI traffic. In travel, AI conversion was still 1% lower. These are relative differences, not percentage-point changes. [18]

Why the result needs care

The comparison is observational. People who choose an assistant, click a recommendation and reach a retailer may have stronger purchase intent before they arrive. The result does not prove that replacing a non-AI visit with an AI visit causes conversion to rise. Nor is the comparator Google alone.

DECISION FOR BUSINESSES

Measure contribution margin and customer quality by journey, alongside referral volume. A fall in low-intent visits can coexist with useful AI referrals; it can also leave a business with too little reach. Optimise for both discoverability and the economics of the customers who arrive.

Sources: [18]. aFactor index conversion: $100 \times (1 + \text{reported relative difference})$. No causal uplift is claimed.

The open web faces an uneven exchange

If answer providers capture attention while source producers lose visits, the economics of producing original information become harder.

GOOGLE ORGANIC REFERRALS TO NEWS SITES



Index, November 2024 = 100. Chartbeat data for more than 2,500 sites, reported by the Reuters Institute: global referrals fell 33%. The portion attributable to AI is uncertain. [14]

Publishers expect further pressure

Surveyed media leaders anticipate a 43% decline in search referrals over three years. This is an expectation, not a measured decline or a forecast of total search volume. It is separate from the historical chart. [14]

Response	Opportunity	Trade-off
Distinctive reporting and expertise	Become difficult to substitute.	Costly to produce; distribution can remain concentrated.
Direct relationships	Subscriptions, communities and recurring visits.	Requires a reason to return independent of search.
Licensing and access controls	Negotiate value for machine use.	May favour larger suppliers and narrow accessible evidence.

THE WIDER FEEDBACK LOOP

Cloudflare documents a changing mix of machine access. If original publishing becomes less economical, answers can become less diverse or current. Source funding is therefore part of search quality. [24]

Sources: [14], [24], [39]. Copyright, retrieval permission, model training and attribution are related but distinct issues.

There will not be one global transition speed

Language, device habits, local data and access conditions can change which interface works best. US-heavy evidence should not be treated as an Indian or worldwide baseline.

Dimension	Why it changes the outcome	India-facing implication
Language and wording	A prompt's language and interpretation can change the retrieved candidates and the framing of an answer.	Evaluate local-language and mixed-language tasks separately; test whether useful local sources survive translation.
Local, current information	Service availability, prices and opening hours depend on live, granular records.	Assistants need reliable merchant and local-service data, not only general web knowledge.
Access and affordability	Cost, latency, device integration and connectivity affect repeat use.	A free, fast, familiar interface may beat a more capable but less accessible one.
Vertical discovery	Retail, video, community and work apps already contain valuable intent and context.	Some journeys can shift within those services without appearing in general-search statistics.

A diversity issue, not just a translation issue

Aral and co-authors' historical comparison of AI search across many countries raises concerns about source concentration. The practical question is whether an answer gives users access to credible local evidence and relevant disagreement, rather than merely fluent prose. The paper is a preprint and does not establish performance for every present-day system. [16]

aFactor judgment

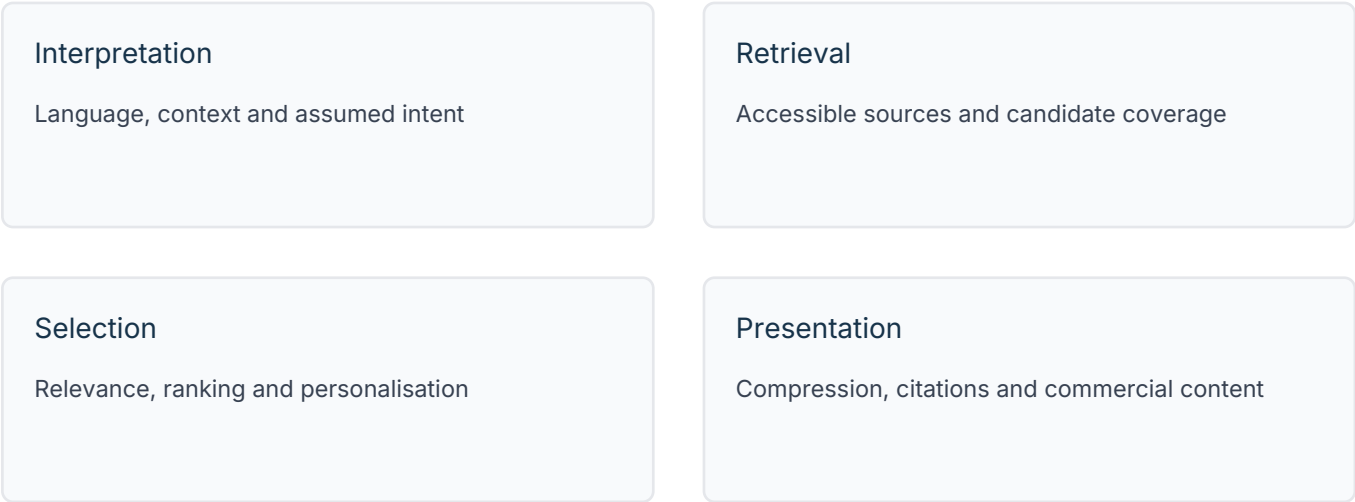
Voice and conversational interfaces may lower the effort of formulating a search. Their advantage will be smaller where recognition, local coverage or verification is weak. We therefore offer a common strategic direction but no unsupported country-by-country market-share forecast.

Sources: [16]. Geographic implications are aFactor hypotheses. This review found no harmonised public journey-share series for India.

Meaningful choice needs an inspectable shortlist

Every search interface selects and orders information. AI synthesis can make those selection decisions harder to see, especially when it presents a single confident recommendation.

WHERE OPTIONS CAN DISAPPEAR



Useful transparency	What it should enable
Why these options?	Explain the main criteria and material constraints; let the user change them.
What was considered?	Show credible sources, relevant alternatives and limits in coverage or freshness.
Did payment matter?	Identify sponsorship, affiliate incentives and material commercial relationships.
Can I challenge the answer?	Offer correction, different assumptions, source inspection and an accessible route to more choices.

There is no universal rule requiring every search or chatbot answer to list every possible option. Duties depend on the jurisdiction, service and activity. The more practical direction is intelligible selection, recognizable commercial influence and a meaningful route to alternatives. [25-33,40-42]

Sources: [17], [25], [26], [28], [30], [31], [32], [40], [41], [42]. The design framework is aFactor's recommendation; it is not a statement that all elements are already mandatory.

Competition policy is reaching the AI search layer

The direction is broader than choosing a default search engine: regulators are addressing data access, distribution and the power to control a user's route to information.

Jurisdiction / status	Action	Likely market effect
US Remedies ordered	The 2025 general-search judgment restricts exclusive distribution arrangements involving Google Search, Chrome, Assistant and Gemini, and provides for specified data access and search syndication. [25]	Creates openings for rivals. It does not automatically change user habits or prohibit every distribution payment.
EU Measures adopted	July 2026 DMA measures specify Android interoperability for AI assistants and access to relevant Google search data, including for eligible search-capable chatbots. Privacy safeguards remain central. [26]	Can reduce barriers to competing assistants and retrieval services; implementation quality will matter.
EU Challenge pending	Reuters reported on 30 September that Google asked the EU court to suspend the data-sharing order. [27]	Timing is contested. A request for a stay is not a granted stay.
EU Designation made	The Commission designated ChatGPT a Very Large Online Search Engine under the DSA in August 2026, with additional obligations due by January 2027 according to its notice. [42]	Shows that conversational products can fall within search-related oversight rather than sit outside existing categories.

aFactor reading

Competition may increasingly turn on access to the device, the user's context and the data needed to answer well. These measures could help independent assistants, but compliance costs can also favour firms with substantial resources. Rules alone do not guarantee effective entry.

Sources: [25], [26], [27], [42]. Status as of 1 October 2026. The US search case is distinct from Google's ad-tech litigation.

The UK and India illustrate different policy stages

Some measures are already imposed, while others remain consultations, studies or recommendations. Treating them as equivalent would overstate the current rules.

UNITED KINGDOM

Publisher control: an imposed requirement

In June 2026, the CMA required effective controls over the use of publisher content in Google's AI search features and model fine-tuning, alongside clearer attribution. Google has nine months to implement the changes, with important elements expected earlier. The requirement is in place; complete implementation should not be assumed. [28]

Consumer choice: still a proposal

The CMA's September consultation proposes choice screens that can include eligible AI assistants. Consultation runs until 9 October, with a final decision expected later in 2026. This is a useful signal of policy direction, not a settled universal design requirement. [29]

INDIA

Consumer protection already provides a starting point

India's dark-pattern guidelines include disguised advertising and manipulative interface practices. Their relevance to a particular AI service depends on the facts and applicable scope; they do not create a general requirement to display every possible option. [32]

Competition analysis is developing

The CCI's AI market study recommends measures including transparency and self-audits, while examining concentration and barriers to entry. A market-study recommendation is not a new binding AI-search code. The near-term direction is closer scrutiny using existing powers alongside policy development. [33]

aFactor expectation

Regulators are likely to focus on conduct users can understand and authorities can test: misleading commercial recommendations, exclusionary access, publisher terms and the usability of choice. The balance and pace will differ by jurisdiction.

Sources: [28], [29], [32], [33]. Selected jurisdictions relevant to the report; this is not an exhaustive survey of every country's law.

Transparency is moving toward observable behaviour

The useful question is whether people can understand and challenge a recommendation, not whether they can see every internal computation.

Policy track	Position at the cutoff	aFactor expectation
AI interaction and labelling	EU Article 50 transparency rules apply from August 2026, with specified transitional treatment for marking pre-existing systems. [30]	More visible AI notices and provenance signals; not an entitlement to complete model reasoning.
Commercial influence	FTC native-ad guidance and India's dark-pattern framework already address misleading presentation of advertising. [31,32]	Sharper scrutiny of sponsorship, affiliate incentives and blurred paid/editorial boundaries.
Ranking explanations	EU P2B rules provide a precedent for explaining key ranking factors and remuneration effects. The Commission has proposed repeal while retaining guidance relevance. [40,41]	Service-specific duties may evolve; no assumption that every chatbot inherits the same rules unchanged.
Source rights and funding	Copyright analysis distinguishes training, retrieval and outputs. A citation is not itself a complete permission or compensation framework. [39]	More licensing, access controls and disputes, rather than one uniform global payment rule.

What effective oversight could examine

Audits can test whether sponsorship is recognisable, whether source claims are supported, whether alternatives change when a user changes criteria, and whether language or geography systematically alters access to relevant options. Complaint handling and repeatable external tests may be more useful than a generic assurance of neutrality.

LIMITS TO THE FORECAST

Transparency can improve accountability without eliminating bias or concentration. Excessively burdensome rules can impede smaller entrants, while vague rules can be easy to satisfy cosmetically. Practical enforcement and measurable user outcomes will determine the effect.

Sources: [30], [31], [32], [39], [40], [41]. Expectations are aFactor analysis. P2B repeal is described as a proposal, not an accomplished change.

The base case is hybrid convergence

aFactor's most plausible direction: AI becomes the usual interface for more tasks, while search engines remain substantial hosts of those experiences.

Planning scenarios, not measured shares. Rounded allocations for the primary interface used in general-purpose information-seeking journeys.

2028 / CENTRAL SCENARIO



2031 / CENTRAL SCENARIO



■ Conventional results ■ AI within search ■ Standalone assistants

By 2031, the central allocation implies...	Share
All AI-mediated interfaces combined (45 + 30)	75%
All engine-hosted interfaces combined (25 + 45)	70%

WHAT THIS ANSWERS

LLMs and search are likely to coexist, but not as two static products. The central case has conventional result-led journeys becoming a minority while AI-enabled search engines remain important. A 70% engine-hosted share would not mean 70% for Google; provider ownership is a separate question.

aFactor judgmental scenario. No fitted model, statistical confidence interval or measured 2026 global baseline. Method: pages 29-30 and 33.

Three futures, with coherent proportions

Each row is a complete scenario that sums to 100%. The alternatives express uncertainty more honestly than an apparently precise single projection.

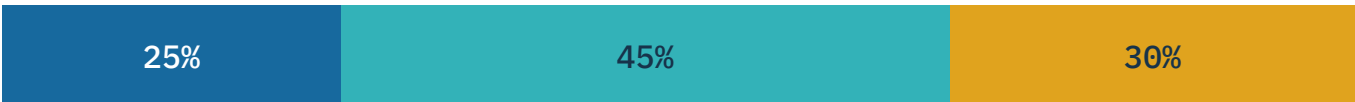
■ Conventional results ■ AI within search ■ Standalone assistants

GRADUAL CHANGE / 2031



Trust, cost and execution limits keep result-led behaviour substantial; AI remains useful but less dominant.

HYBRID CONVERGENCE / 2031



Incumbents integrate AI successfully, while standalone assistants gain recurring research and planning tasks.

ASSISTANT-LED MARKET / 2031



Assistants win default access and reliable execution; users increasingly start and finish tasks inside them.

HOW TO READ PLAUSIBILITY

Hybrid convergence is the base case because it fits incumbent adaptation and growing assistant use. These are credible alternatives, not statistical bounds. The evidence does not support precise numerical probabilities.

All percentages are aFactor scenario assumptions, rounded to five points. This is not an expert-consensus forecast.

Why these proportions are plausible, and uncertain

The evidence supports the direction more strongly than the magnitude. The allocations are designed for planning, not presented as an econometric prediction.

The reasoning behind the base case

First, an existing search habit gives engines a fast route to distributing AI. Second, assistants offer clear convenience for synthesis and iterative questions. Third, navigation, live local information, verification and source-seeking remain useful. Together these support a large AI share, a continuing engine role and a substantial assistant market.

Why the numbers are rounded

No public, harmonised baseline exists for our unit of analysis. We therefore use coarse five-point allocations rather than extrapolating website visits into global task share. The percentages encode the relative strength of the mechanisms above. They are a transparent aFactor judgment; the data do not uniquely determine them.

SENSITIVITY AROUND THE 2031 BASE CASE

Change in assumption	Illustrative allocation*	Mechanism
Assistants win more default access	25 / 35 / 40	Ten points move from engine AI to standalone assistants.
AI becomes easier inside engines	15 / 55 / 30	Ten points move from conventional results to engine AI.
Reliable execution takes longer	35 / 45 / 20	Ten points remain result-led rather than moving to assistants.

*Conventional results / AI within search / standalone assistants; each sums to 100%. These are sensitivity illustrations, not additional probability estimates.

Geography and the longer horizon

Supporting behaviour data are disproportionately US and connected-market evidence. India and lower-resource languages could follow different paths. Beyond 2031, device-level agents or specialist ecosystems may change the categories themselves, making numerical shares less useful.

Sources: [1], [3], [5], [9], [15], [25], [26]. The scenario is not calibrated to adoption percentages or company usage claims. Assumptions should be refreshed as comparable journey data become available.

The indicators that should change our view

Watch outcomes rather than launch announcements. A useful monitoring system separates demand, value, reliability and access.

Indicator	Signal toward assistant-led search	Signal toward continued hybrid search
Starting and finishing point	Repeated tasks begin and end in assistants, including commercial tasks.	Users regularly return to engines or primary sources to complete the task.
Task success and correction	Lower verification effort and reliable action completion.	Users need frequent corrections, external checks or manual recovery.
Distribution choices	Users select assistants as defaults and retain them after prompts.	Choice screens have limited durable impact on engine habits.
Commercial performance	Sustainable advertiser or transaction value after service costs.	Monetisation remains weak or harms trust and retention.
Source ecosystem	Diverse, current content remains accessible with viable supply economics.	Licensing fragmentation and restrictions narrow useful coverage.
Geographic breadth	Comparable gains across languages, regions and device classes.	Adoption remains concentrated in selected tasks and populations.
Regulatory implementation	Interop and data access enable credible alternative services.	Delayed, contested or difficult implementation limits practical entry.

SUGGESTED REVIEW CADENCE

Refresh the evidence quarterly, and reconsider the scenario allocations annually or after a major distribution change. The most valuable new input would be a representative panel tracking complete information-seeking journeys across engines, assistants and specialist services.

aFactor monitoring framework. These are decision signals, not claimed current measurements.

Prepare for a mixed discovery environment

The appropriate response is to build capabilities that remain useful across the plausible scenarios, while testing where behaviour is actually changing.

For whom	Practical priorities	Measure success by
Businesses and brands	Keep product facts current; make original expertise accessible; test representative user questions across interfaces.	Qualified demand, contribution margin, accurate representation and customer retention.
Publishers and creators	Strengthen distinctive work and direct relationships; evaluate licensing and access controls alongside discoverability.	Revenue per audience relationship and the cost of producing information worth returning for.
Search and AI providers	Make source inspection and alternatives usable; distinguish commercial content; preserve user control over actions.	Task success, trust, repeat use and sustainable source relationships.
Researchers and regulators	Study whole journeys and realistic language contexts; test disclosure and choice in practice.	Whether users understand the service and can obtain a different, credible outcome.
Individuals and professionals	Use synthesis for orientation; inspect primary sources for consequential decisions; compare options before acting.	Time saved after verification, rather than fluency or answer speed alone.

Visibility work should remain grounded

Google's official guidance says established SEO fundamentals continue to apply to its AI features. That supports accessible, reliable information and clear site structure. It does not justify promises of guaranteed citations or a universal formula for appearing in every model's answers. [34]

aFactor's concluding judgment

Search will increasingly feel like a conversation and sometimes an action. Engines, assistants and specialist services will share that work. The strategic priority is to understand which tasks move, who captures their value and whether the underlying information ecosystem remains trustworthy.

Sources: [34]. Recommendations are aFactor synthesis, not guarantees of ranking, commercial return or regulatory compliance.

Evidence standards and calculation notes

Research cutoff: 1 October 2026. This is a public-source synthesis, not an original consumer survey, product benchmark or commissioned expert interview programme.

How the review was conducted

We compared primary financial disclosures, official product documents, survey research, observed browsing, academic studies, commercial analytics, published expert commentary and regulator materials. The source register gives dates, links and important qualifications. The report prioritises direct evidence over repeated media summaries of the same dataset.

Evidence / calculation	Definition or limit
Adoption and clicks	Pew adoption is US adult self-report; click evidence concerns a separate browsing panel. The populations and dates must not be merged.
Traffic and audiences	Similarweb and DataReportal estimates are not independent confirmations. Website and app users overlap. Referral share excludes answers without outbound clicks.
Commercial research families	Adobe acquired Semrush in April 2026. Related vendor evidence should not be counted as fully independent simply because it has different brand names. [37]
Financial calculations	Revenue growth = $(63.271 / 54.190 - 1) \times 100 = 16.76\%$. Search & other revenue share = $63.271 / 119.796 \times 100 = 52.82\%$.
Normalised charts	Publisher index = $100 \times (1 - 0.33) = 67$. Adobe indices add the reported relative premium to a non-AI baseline of 100.
Scenario accounting	Classify a journey by its primary resolving interface, not every touchpoint. A Gemini app journey can be standalone; a Google AI Mode journey is engine-hosted. Legal classifications may differ.

Material limitations. Public evidence is uneven across countries and languages, product changes are rapid, panel instrumentation is incomplete and several studies are historical or preprints. The future proportions are judgmental. None of the scenarios should be read as a measured global baseline or a statistical confidence interval.

Sources: [1], [2], [3], [5], [7], [14], [15], [18], [37]. All charts were redrawn by aFactor from identified data or explicitly labelled assumptions.

Sources 01–09

Primary material is prioritised. Titles are clickable; dates distinguish publication, measurement period and retrieval where needed.

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- [01] Pew Research Center | 17 Jun 2026
[Americans and AI 2026: Chatbots, Smart Devices and Views on Impact](#)
US survey; fieldwork 17–23 Feb 2026. Question wording changes affect trend comparison.
-
- [02] Pew Research Center | 22 Jul 2025
[Google users are less likely to click on links when an AI summary appears](#)
Observed browsing, March 2025; results reconstructed in April. Association, not causation.
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- [03] Similarweb | 2026; accessed 1 Oct
[Is AI replacing search?](#)
Estimated audience overlap through May 2026. Use of both services can mask task substitution.
-
- [04] Semrush | 7 Apr 2026
[ChatGPT Search Insights: 17 Months of Data](#)
US clickstream, Oct 2024–Feb 2026; instrumentation and panel coverage matter.
-
- [05] DataReportal | 2026
[Digital 2026 Mid-Year Global Update Report](#)
Similarweb-derived website and app audience estimates; these audiences overlap.
-
- [06] Statcounter Global Stats | Sep 2026 snapshot
[Search Engine Market Share Worldwide](#)
Provisional September values retrieved 1 Oct; referred-pageview metric, not all search tasks.
-
- [07] Alphabet / SEC | 22 Jul 2026
[Alphabet Announces Second Quarter 2026 Results](#)
Company financial disclosure; Search & other is a reported revenue category.
-
- [08] Sundar Pichai / Google | 22 Jul 2026
[Alphabet earnings: Q2 2026](#)
Management commentary. Claims about AI-driven query growth are company-reported.
-
- [09] Liz Reid / Google | 19 May 2026
[Search at I/O 2026](#)
Product announcements and rollout direction; availability varies by feature and market.
-

All links accessed or verified by 1 October 2026.

Sources 10–18

Primary material is prioritised. Titles are clickable; dates distinguish publication, measurement period and retrieval where needed.

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- [10] Google | 6 May 2026
[New ways to explore the web with generative AI in Search](#)
Company description of citations, previews and source-discovery features.
-
- [11] Gartner / Alan Antin | 19 Feb 2024
[Search engine volume forecast: 25% decline by 2026](#)
Prediction; public release lacks a fully auditable baseline and measurement series.
-
- [12] Benedict Evans | 23 Nov 2025
[AI, networks, and mechanical turks](#)
Independent strategic commentary on new information filters and product structures.
-
- [13] Benedict Evans | 19 Feb 2026
[How will OpenAI compete?](#)
Strategic opinion about durable differentiation and distribution, not a market-share forecast.
-
- [14] Nic Newman / Reuters Institute | 12 Jan 2026
[Journalism, media, and technology trends and predictions 2026](#)
Publisher survey and Chartbeat referral data; news publishers do not represent all websites.
-
- [15] Wang, Gleason, Bart, Wilson & Metaxa | 18 Aug 2026; preprint
[AI in Search Reduces Publisher Referrals Without Improving User Experience: Experimental Evidence](#)
1,100 US Chrome/Google users; 10-day experiment. Forced use differs from voluntary adoption.
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- [16] Sinan Aral, Haiwen Li & Rui Zuo | Feb 2026; preprint
[The Rise of AI Search: Implications for Information Markets and Human Judgement at Scale](#)
24,000 queries across 243 countries; historical outputs, 2024–25. Scope and ratings limit inference.
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- [17] Tow Center / Columbia Journalism Review | 6 Mar 2025
[We compared eight AI search engines. They are all bad at citing news](#)
News excerpt-identification audit; not a current error rate for every AI search task.
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- [18] Adobe Digital Insights | Aug 2026
[AI Traffic Trends Report](#)
July 2026 referral outcomes. AI/non-AI comparisons are observational and affected by user intent.
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All links accessed or verified by 1 October 2026.

Sources 19–27

Primary material is prioritised. Titles are clickable; dates distinguish publication, measurement period and retrieval where needed.

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- [19] OpenAI | 16 Sep 2026
[Reimagining advertising with AI](#)
Sponsored Agents and ad customization described as tests; company policy, not an independent audit.
-
- [20] OpenAI | 31 Aug 2026
[Expanding access to AI with ChatGPT ads](#)
Company account of advertising expansion. Report does not infer paid organic rankings.
-
- [21] Anthropic | 4 Feb 2026
[Claude is a space to think](#)
Public commitment to an ad-free Claude experience; policy is not proof of viewpoint neutrality.
-
- [22] Anthropic | 20 Mar 2025
[Claude can now search the web](#)
Primary source for web retrieval and citation functionality; launch-era description.
-
- [23] xAI documentation | Accessed 1 Oct 2026
[Web Search](#)
Primary developer documentation on live web retrieval; not a comparative quality benchmark.
-
- [24] Cloudflare | 1 Jul 2026
[The agentic Internet: bot report](#)
Crawler classifications within Cloudflare traffic, not a census of the whole Internet.
-
- [25] US Department of Justice | 2 Sep 2025; updated 2026
[Department of Justice wins significant remedies against Google](#)
General-search antitrust remedies; distinct from the separate ad-tech litigation.
-
- [26] European Commission | 16 Jul 2026
[Google AI interoperability and search-data sharing under the DMA](#)
Binding specification measures; implementation and litigation affect timing.
-
- [27] Reuters | 30 Sep 2026
[Google asks EU court to suspend data-sharing order](#)
Reports an application for suspension; not evidence that a stay was granted.
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All links accessed or verified by 1 October 2026.

Sources 28–36

Primary material is prioritised. Titles are clickable; dates distinguish publication, measurement period and retrieval where needed.

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- [28] UK Competition and Markets Authority | 3 Jun 2026
[Fairer deal for publishers in Google search](#)
Conduct requirement imposed; nine-month implementation period.
-
- [29] UK Competition and Markets Authority | 23 Sep 2026
[Proposals allowing choice over search service](#)
Consultation until 9 Oct 2026. Proposed choice screens include eligible AI assistants.
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- [30] European Commission | Updated 29 Jul 2026
[Quick facts: transparency rules for AI systems](#)
Article 50 timing and transitional provisions; obligations differ by actor and use case.
-
- [31] US Federal Trade Commission | 2015; accessed 1 Oct 2026
[Native Advertising: A Guide for Businesses](#)
Existing guidance on recognizable advertising and clear, prominent disclosure.
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- [32] India, Press Information Bureau | 22 Jul 2025
[Consumer protection and dark-pattern guidelines](#)
Government account of the 2023 guidelines, including disguised advertisements.
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- [33] Competition Commission of India / PIB | 6 Oct 2025
[Market study on artificial intelligence and competition](#)
Study and recommendations on transparency, self-audits and competition; not a new binding AI code.
-
- [34] Google Search Central | Accessed 1 Oct 2026
[AI features and your website](#)
Official guidance on eligibility, query fan-out and established SEO practices.
-
- [35] aFactor | Accessed 1 Oct 2026
[Organization website](#)
Organizational context only; not independent evidence for market forecasts.
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- [36] aFactor | Internal document
[Brand Guidelines v3](#)
Source for institutional positioning.
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All links accessed or verified by 1 October 2026.

Sources 37–42

Primary material is prioritised. Titles are clickable; dates distinguish publication, measurement period and retrieval where needed.

- [37] Adobe | 28 Apr 2026
[Adobe completes Semrush acquisition](#)
Used to avoid treating related commercial data sources as fully independent.

- [38] OpenAI | 31 Oct 2024; updated 2025
[Introducing ChatGPT search](#)
Primary account of web search, citations and third-party search/content inputs.

- [39] US Copyright Office | May 2025; pre-publication
[Copyright and AI, Part 3: Generative AI Training](#)
Policy analysis, not a binding court ruling or a universal resolution of fair use.

- [40] European Commission | Updated 2 Jul 2026
[Platform-to-business trading practices](#)
Notes proposed P2B repeal and continuing relevance of ranking guidance; distinguish proposal from law.

- [41] European Union | 20 Jun 2019
[Regulation \(EU\) 2019/1150, Article 5](#)
Ranking-parameter and remuneration transparency precedent; coverage is service-specific.

- [42] European Commission | 31 Aug 2026; updated 4 Sep
[ChatGPT designated under the Digital Services Act](#)
ChatGPT designated a VLOSE; Commission gives January 2027 for additional obligations.

READING THE SOURCE BASE

A source can be authoritative about its own figures or policy without being independent about market consequences. Financial disclosures support reported results; product announcements support product direction; commercial analytics and preprints require methodological care. The scenario judgment remains aFactor's.

ABOUT THE REPORT

Prepared by aFactor

An evidence-led perspective on technology, industry change and the capabilities people need to navigate it.



aFactor

Career transformation.
Future industry leadership.

About aFactor

aFactor is an institution for career transformation and future industry leadership, with offices in Pune, Mumbai and Delhi. Its brand framework emphasises capability, portfolio-backed competence and the development of serious professionals. This report applies a clear, practical lens to an industry transition with consequences for businesses, institutions and individuals. [35,36]

Research and presentation

Prepared from public sources, with original synthesis, charts, diagrams and illustrative interfaces. No expert interviews or direct product accuracy tests were conducted for this report.

Publication details

October 2026 edition

Research cutoff: 1 October 2026

Title: The Future of Search

Prepared by: aFactor

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Sources: [35], [36].