



**WHAT REALLY WORKS:
DESIGNING STRATEGY
AROUND BEHAVIOUR,
NOT PLATFORMS**

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**This is a
\$15bn
presentation.**

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SPORTOGRAF.COM







**Perthshire,
Scotland.**

2014.

A man named Tam O'Braan
had a story to tell.

The Wee Tea Plantation.

Clients The Balmoral. The Dorchester. Fortnum & Mason.

Claim "Favourite of the late Queen Elizabeth."

Coverage BBC podcast. National press. Industry awards.

CV Polymer scientist. Botanist. Multi-millionaire.



[News](#) / [Glasgow & West](#)

Conman jailed for three and half years for duping hotels with fake Scottish tea

Thomas Robinson bought tea from around the world and sold it on as Scottish.



But here's the thing.

It worked.

**He didn't manufacture a product.
He manufactured a default.**

And everyone in this room is about to find out exactly how, and why it matters to them.

He understood two things most marketers don't.

Default Effect

We accept what's already there.
We don't question the pre-selected option.
Google is the default. Tam exploited it.

Status Quo Bias

Switching feels costly, even when
the alternative is clearly better.
Familiarity wins. Every time.

These two forces explain your customers.

The **same psychology** that made
a man rich selling fake Scottish tea
is silently governing **how your**
customers find you right now.

Where we're going.

01

The Psychology, via Behavioural Science

Default Effect. Status Quo Bias. Delegated Choice.

02

The Data

5 quarters. 12,000 people. The behaviour behind the numbers.

03

The Fractured Funnel

Four psychologically distinct forks. One big brand problem.

04

What To Do

The Default Mapping Exercise. Take it home today.

ACT 01

The Psychology of Digital Habit

Quick question...just nod.

**How many of you Googled
something this morning?**

**Now... how many questioned
WHY you used Google?**

The Default Effect

We accept what's already there. We don't question the pre-selected option.



Browser defaults

Google ships as default on Chrome, Safari, Firefox.
Most people never change it. Not because it's best.



App store defaults

The pre-installed app wins.
Not because it's better but because switching takes effort.



Wee Tea

Nobody questioned Tam's credentials.
Credibility was the default assumption.

Status Quo Bias

Switching feels costly, even when the alternative is clearly better.

*"Google works,
why change?"*

*"Didn't get in the
habit of doing so."*

Real SearchPulse respondents. 12,000 people. Not opinion, behavioural data.



Status Quo Bias: in their own words

This isn't just about search.



Organ Donation

Opt-in countries:

4–28% donor rate

Opt-out countries:

85–90%+ donor rate



Apple ATT (2021)

Opt-in tracking:

96% chose NOT to share

Cost to Meta:

~\$10 billion



Delegated Choice.

When we let AI, algorithms, or platforms
make decisions on our behalf...

we don't escape bias. We inherit someone else's.

There's a third force reshaping search. Most brands haven't noticed it yet.

Not everyone inherited the same defaults.

Different generations. Different platforms. Different psychological anchors.
Status Quo Bias then locked each one in place.

Gen Z / Alpha

TikTok. Instagram.
Social-first from birth.

Millennials / Gen X

Google + Social.
Hybrid defaults.

Boomers +

Google.
Full stop.



Default Effect + Status Quo Bias

**We didn't have to guess.
We went and asked 12,000
people.**

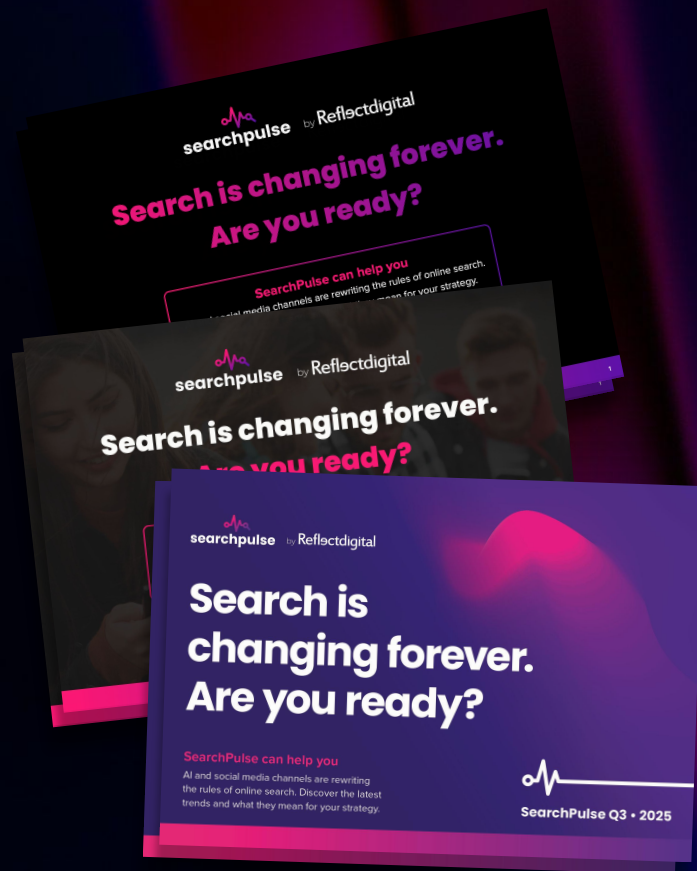
5 quarters. Nationally representative. Every data point has a psychology behind it.

ACT 02

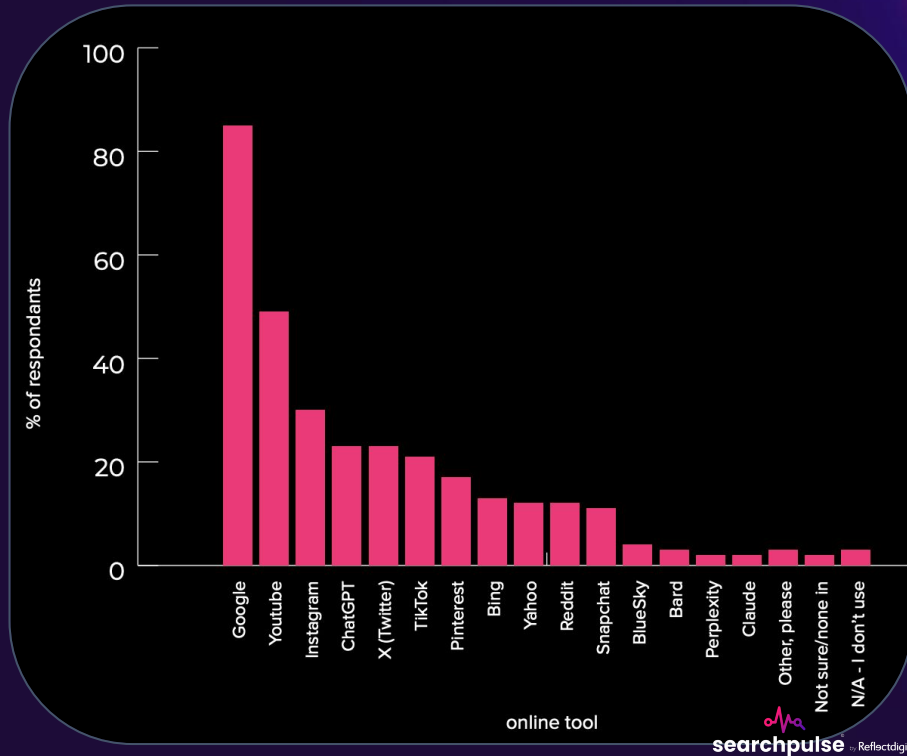
The Data.

5 Quarters of SearchPulse Research

**All of the data
you see today
is from our
SearchPulse
reports.**



8 in 10 use Google. Bing is 8th.

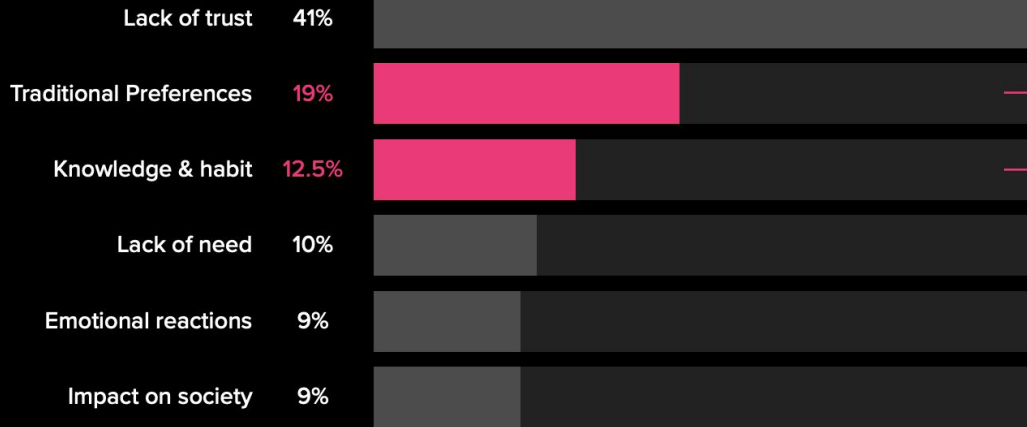


**Social media:
positions 2–7**

ChatGPT already 4th at 27%.

"Google works, why change?"

Why don't people use AI more?

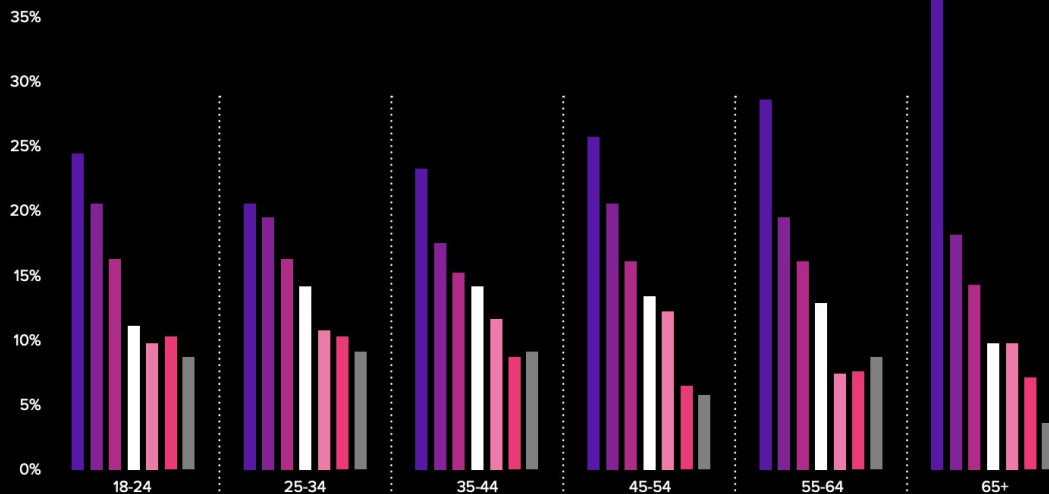


**Not rational.
Emotional.**

Authority Bias.
Confirmation Bias.
Status Quo Bias.

All live, right here, in this data.

AI use declines sharply with age.



- Looking for information related to research
- To search for work purposes
- Learning a new skill or process
- Doing product research before purchase
- Looking for inspiration
- Booking a trip or event
- Looking for an event in my local area

72%

of 65+ never used AI

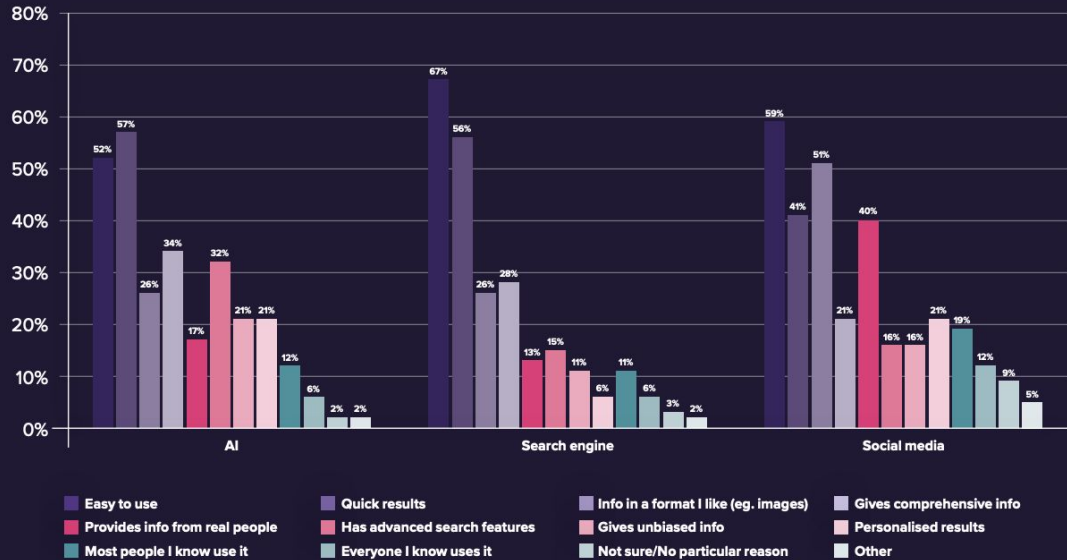
vs 12% of 18–24s.

Not preference. Psychological divide.

Different defaults baked in at different life stages.

 Status Quo Bias at population scale

Platform choice depends on what you're looking for.



“Search is a journey.”

Google first.
Social for inspiration.
AI for depth.

Mere Exposure Effect:
platforms appearing repeatedly
become trusted automatically.

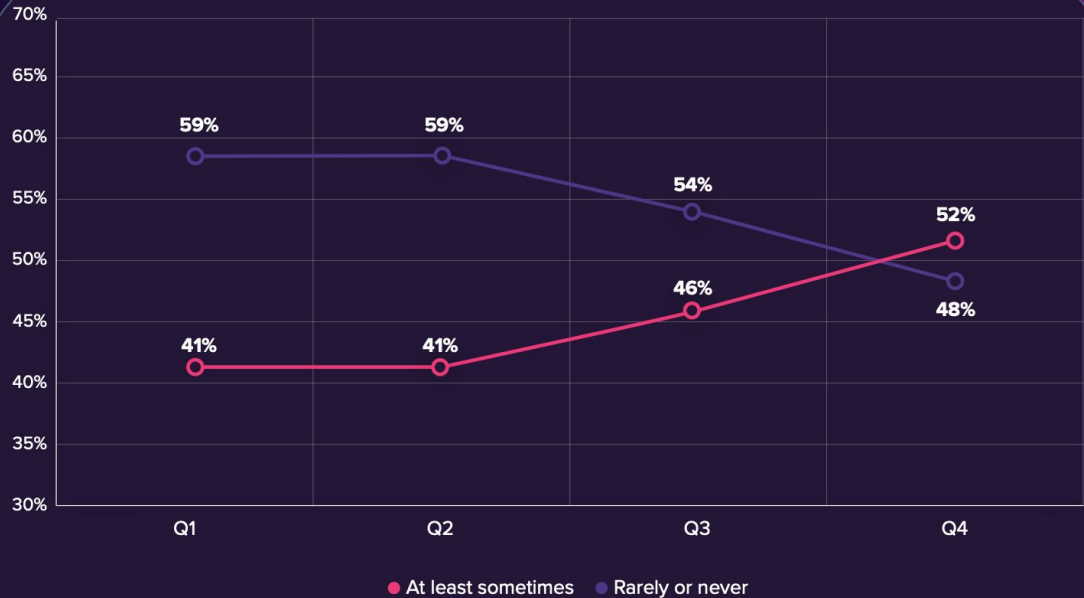
Q4 2025 · THE MAJORITY THRESHOLD

52%.

For the first time, more people use AI search than don't.

AI has moved from Early Adopters to Early Majority. A full quarter ahead of projections.

Something shifted in Q4.



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

The lines are crossing.

Right now.
While you're in this room.

Statistically significant
($p < 0.05$).

New defaults are being set.

Whose are they?

Why people choose a platform.

Emotional



We want to know what others are doing and feel like we belong.

Social Proofing/Norms

People tend to conform to the actions or opinions of others when they are uncertain about what to do.



We want to express our own identity and individuality.

Personalisation

People are more receptive to messages and content that target their identity and preferences.

External



We want to be right and rely on who or what is trustworthy.

Confirmation Bias

People tend to seek out information that aligns with previous beliefs.

Personal



We want to make things easier for ourselves.

Choice Overload

People tend to place higher value on things they helped create.

Rational

Same holiday destination. Four completely different funnels.

Under 25

TikTok
every stage

25-44

ChatGPT
+ OTAs

45-54

Google
throughout

55+

Travel agents.
Word of mouth.



Default Effect across generational cohorts

Same destination. Four completely different funnels.

	Inspiration	Consideration	Booking	Deals
18 to 24	<ol style="list-style-type: none"> TikTok Instagram YouTube 	<ol style="list-style-type: none"> TikTok ChatGPT 	<ol style="list-style-type: none"> TikTok ChatGPT Booking.com 	<ol style="list-style-type: none"> TikTok Instagram
25 to 34	<ol style="list-style-type: none"> TikTok Instagram YouTube Booking.com 	<ol style="list-style-type: none"> Instagram ChatGPT Booking.com Google Search 	<ol style="list-style-type: none"> Instagram ChatGPT Booking.com Tripadvisor Google Search 	<ol style="list-style-type: none"> Instagram ChatGPT Booking.com Google Search
35 to 44	<ol style="list-style-type: none"> Instagram YouTube Booking.com Tripadvisor Google Search 	<ol style="list-style-type: none"> YouTube ChatGPT Tripadvisor Booking.com Google Search 	<ol style="list-style-type: none"> YouTube ChatGPT Tripadvisor Booking.com Google Search 	<ol style="list-style-type: none"> ChatGPT YouTube Tripadvisor Booking.com Google Search

Q1 2026 · A REGIME CHANGE

For the first time ever...

TikTok overtook Google for 18–24s.

Q1 2026.



New defaults forming. This is the Default Effect in motion.

One year later. Google's grip is loosening. Users aren't leaving, they're expanding.

Online tools used for search, Q1 2025 vs Q1 2026



What online tools, if any, do you use to search regularly? n=4,000

People aren't leaving Google.

They're leaving the link-based SERP.

They want answers. Not links to answers.

This is Delegated Choice, and it's happening inside Google itself.

ACT 03

The Fractured Funnel.

The funnel hasn't broken. It's psychologically forked.



**Traditional
Searcher**



**Streamlined
Searcher**



**Multi-platform
Searcher**



**Digital
Explorer**

The funnel hasn't broken. It's psychologically forked.

FORK 1

Gen Z / Alpha

No Google default.
Social-first from day one.

Trust = peer validation

FORK 2

Millennials / Gen X

Hybrid. Google-anchored
for high-stakes.

Trust = authority

FORK 3

Boomers +

Status Quo Bias locked in.
Years of habit.

Trust = simplicity

FORK 4

AI Delegated

Platform-agnostic.
Growing fast. Invisible.

Trust = whoever trained it

**“Azeem, how do
these humans
search?”**



62%

of 18–34s
search via
social media

🧠 **Default Effect > social-first from birth**

They never had a Google default.

→ TikTok overtook Google for 18–24s > Q1 2026

→ Avg 5 search platforms daily (vs 2.1 for 65+)

→ 14% use TikTok for mental health advice

→ 25% use TikTok for dating & relationship advice

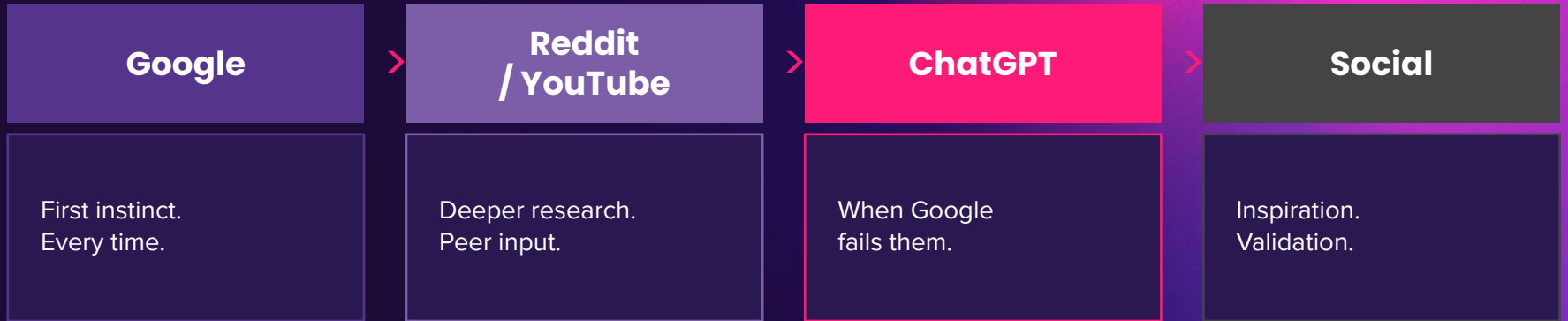
→ Gen Z avg 5-word long-tail search queries

→ Peer validation beats authority every time

✓ **Visual-first** ✓ **Platform-native** ✓ **Multi-platform**

Hybrid. The most complex fork to reach.

Their search journey:



- AI usage peaks at 25–34 > highest of any cohort
- 58% replaced search with AI for product research (up from 25% in 2023)
- 25–44 most likely to use AI for shopping (57%)
- Still Google-anchored for high-stakes decisions



Confirmation Bias + Authority Bias

Status Quo Bias compounded by decades.

*"It's all got too much too quickly
and it's getting too intrusive."*

*"Sometimes it's a struggle. Modifying a search to ask
the correct questions can be frustrating."*

Real SearchPulse respondents, 55–65+ cohort

✓ Traditional SEO ✓ YouTube for learning ✓ Simplicity = trust



Status Quo Bias > deeply entrenched

72%

of 65+ never used AI

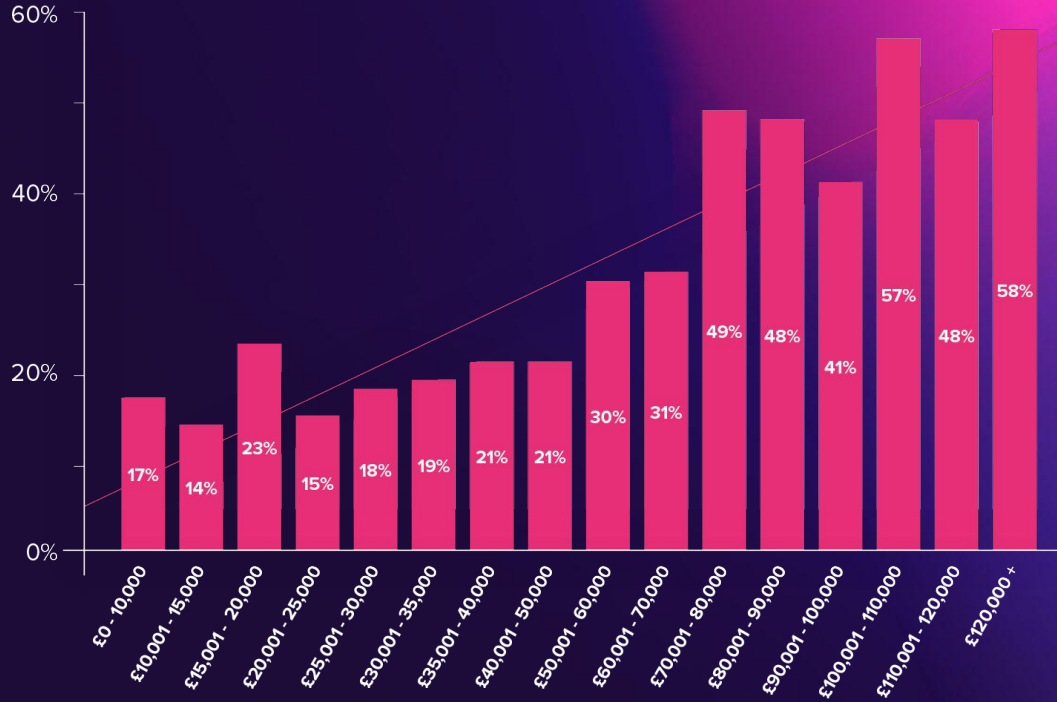
2.1

avg platforms (vs 5 for 18-34)

80%+

Google dominance for 45+

The invisible fork. And the fastest-growing.



Delegated Choice > invisible by design

The invisible fork. And the fastest-growing.

Most people consuming Google AI Overviews don't know they're using AI.

They read the answer. They're satisfied. The decision is delegated without their awareness.

2x

High-income users
(£70k+) more likely
to use ChatGPT

\$750bn

Consumer spend through
AI search globally
by 2028 (McKinsey)

96%

iOS users who chose
not to share data
(Apple ATT)



ACT 04

What To Do.

Your novel actionable.



60%

Traditional Searcher

These make up the users of the baseline revenue you will lose if your SEO fundamentals slip.



28%

Streamlined Searcher

These are the “messy middle” conversions you lose when search and social messaging misalign.



10%

Multi-platform Searcher

These are the next generation of buyers who are entirely blind to you if you ignore native social search.



2%

Digital Explorer

These are your highest-value leads, currently being handed to competitors by AI agents.



Delegated Choice > invisible by design

Real talk.

**Who in this room is optimising
for more than two of these
forks?**

If you're single-fork, you're already losing ground.

Your audience's four search personas.

From 5 quarters of SearchPulse. Every customer falls into one of these.

60%

Traditional Searchers

Google-led.
Autopilot.
Habit-locked.

 Status Quo Bias

28%

Streamlined Searchers

Google +
Social.
Aesthetic validation.

 Mere Exposure Effect

10%

Multi-Platform Searchers

TikTok/Instagram
as primary search.

 Social Proof

2%

Digital Explorers

AI-first.
Highest income
(£120k+).

 Delegated Choice

The Default Mapping Exercise.

Three questions. One page. Immediate clarity on where to show up.

1

Which persona is your primary audience?

Traditional (60%) · Streamlined (28%) · Multi-Platform (10%) · Digital Explorer (2%)

→ Identifies which bias you're fighting

2

Which platform are they using for your category?

Use SearchPulse motivation map: Crowd-Sourcing / Taste-Tuning / Fact-Finding / Streamlining

→ Identifies the channel mix

3

What trust signal does that persona need?

Gen Z: peer validation · Millennial/GenX: authority · Boomer: simplicity · AI-first: citation volume

→ Identifies content & positioning

What it looks like, in practice.

Fashion Retailer > 18–35 year olds

Persona split

38% are NOT Google-first (10% Multi-Platform + 28% Streamlined)

Search motivation

Inspiration-led (Taste-Tuning) → Social Media is the primary discovery channel

Bias at play

Mere Exposure Effect > the brand appearing repeatedly becomes trusted automatically

Trust signal

Peer validation + visual proof → UGC, creator content, social proof at scale

Channel mix

TikTok (discovery) · Instagram (inspiration) · Google (intent) · AI (comparison)

Remember Tam O'Braan?

**He didn't build a better
product.
He built a better default.**

Remember that lemon face?

You accepted a default that I set in 90 seconds.

Your customers accept theirs over a lifetime.



Your customers' defaults are being reset **right** **now.**

The question isn't whether the funnel has fractured.
It has. The question is...which fork are YOU showing up on?



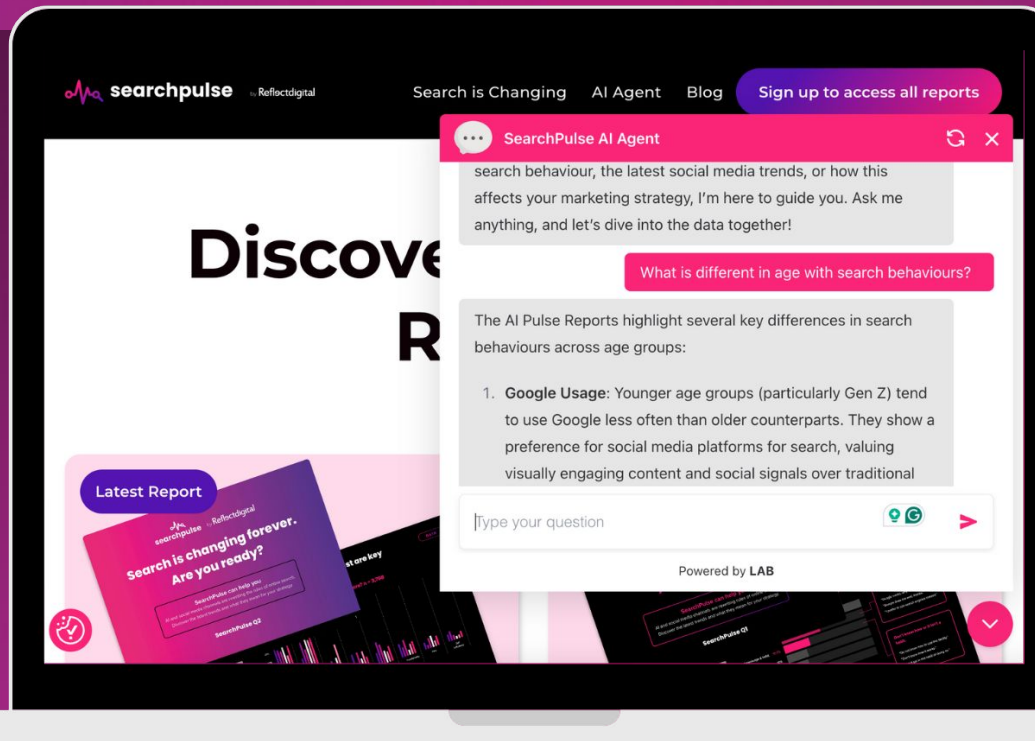
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New front door to the internet: Winning in the age of AI search

October 16, 2025 | Article

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Half of consumers use AI-powered search today, and it stands to impact \$750 billion in revenue by 2028—what is your strategy and activation plan for gen AI engine optimization?

 McKinsey & Company – Listen to the article: New front door to the internet: Winning in the age of AI search

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