

Hakuhodo DY ONE's Next Generation Search Lab piONEer releases the AI Search White Paper 2026

Tokyo, March 2, 2026 – Hakuhodo DY ONE, Inc. is pleased to announce that its Next Generation Search Lab piONEer has released the AI Search White Paper 2026, which brings together research and analysis findings on AI search.



Generative AI is now an indispensable tool, having become deeply embedded in daily life and across business. The search sector has seen rapid uptake of AI search services, which automatically synthesize search results in response to text queries and summarize them in plain language. Many people now use AI search regularly. Against this backdrop, platform companies are, in addition to expanding search ad placements, launching generative AI-driven search ads and AI search services. These developments mean that advertisers need to adopt a different approach to search ad management from that they have followed in the past.

The Next Generation Search Lab piONEer is committed to provide guidance to the industry in response to these changes. By tracking and studying the latest developments in AI search, it is taking steps to enable businesses to effectively leverage AI search in their marketing strategy. As part of the activities of HCAI Professionals, a team of AI professionals spanning the Hakuhodo DY Group, it has just released the AI Search White Paper 2026, which assesses the state of AI search and analyzes its impact on the advertising industry. Following on last year's AI Search White Paper 2025, this publication presents independent research findings on AI search service usage, shares basic facts about AI search services and forecasts future trends, and assesses the impact on traditional search ads.

■ Summary of the AI Search White Paper 2026

With the spread of generative AI, people's search behavior is now at a major turning point. The AI Search White Paper 2026 analyzes, from our own unique perspective, how people's use of AI search has evolved over the year since the previous survey in March 2025. It provides a complete picture of where AI search stands today, from the latest usage trends to its potential for advertising.

1. Overview of AI search and features of major AI search services

AI search is defined, and the features of major AI search services are described.

2. The state of the AI search market and recent trends

The share of monthly sessions is broken down by search engine and AI search service, and the number of app sessions is compared. Trends in services in the AI search sector are also examined.

3. Impact on traditional search and SEO and action to take in response

The importance of AI optimization (AIO)—optimizing content for AI search—is stressed, and the impact of AI Overviews on Google Search ads is considered.

4. Risks and precautions for businesses using AI search services

Issues related to AI search are identified, such as potential infringement of privacy and copyright concerns. Precautions are offered for businesses using AI search.

5. Nov. 2025 survey findings: Uptake of AI search services among users and changes from the previous survey

The increase in AI search service usage is traced, and specific use situations are identified. Users' views of generative AI are analyzed, along with issues facing the technology. The impact of AI search on search behavior and the advertising market is projected, and its future potential is assessed.

◇AI Search White Paper 2026 <https://oneder.hakuhodody-one.co.jp/blog/ai-search-trend-2026>

■ Next Generation Search Lab piONEer

The Next Generation Search Lab piONEer is a cutting-edge research project dedicated to exploring the potential new horizons that AI search and AI search services open up for advertising. It aims to research and develop new advertising strategies and solutions for the era of AI search. Spearheaded by a team of media experts from Hakuhodo DY ONE, it also brings together the expertise of three other teams: experts in the SEO and AIO field, technology development experts specializing in R&D on the latest AI technology, and AI strategy planning experts specializing in researching AI in advertising and converting it to business use. Drawing on the wealth of experience and knowledge that Hakuhodo DY ONE has built up over the years in the SEM market (search ads and SEO), the Next Generation Search Lab piONEer brings innovation and value to advertising in the AI search era.

<https://www.hakuhodody-one.co.jp/service/marketing-lab/pioneer/>

< Corporate Information >

■ Hakuhodo DY ONE Inc. <https://www.hakuhodody-one.co.jp/en/>

Hakuhodo DY ONE leverages its expertise and know-how in digital advertising, cultivated since the early days of internet advertising, to provide integrated digital marketing services. With strengths in marketing strategy formulation, creativity, advanced operational management, technological development, and close relationships with media companies and platforms, we offer comprehensive support for digital-driven marketing strategies and technology utilization to both Japanese and international clients.

As we move forward as the "Digital Core" of the Hakuhodo DY Group, we aim to become the industry's leading digital marketing company by consolidating the group's knowledge and resources and combining high-level expertise with strong proposal capabilities.

By positioning ourselves as an Integrated Strategy Partner, we will continuously challenge and advance ourselves to be our clients' one and only "ONE" for their sustainable growth and enhancement of corporate value.

Location : Akasaka Biz Tower, 5-3-1 Akasaka, Minato-ku, Tokyo 107-6316, Japan
Representative : Yuzo Tanaka, Chairman of the Board, Representative Director
Hiroto Kosaka, President, Representative Director
Shareholders : 100% owned by the Hakuhodo DY Group
Employees : 3,172 (April 1, 2025, forecast)
Start of integration : April 1, 2024
Business : Planning, consulting, agency operations and investment activities
related to all aspects of digital marketing

For inquiries regarding this News Release

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