

Google I/O 2025: As Google pushes AI Mode in Search, will it help ease antitrust pressure?

At this year's I/O developer conference, Google's AI search-related announcements largely echoed its arguments in the ongoing antitrust remedies case.

Google's experimental AI Mode feature in Search, that enables deeper and more complex search queries, is now rolling out to all users in the US to start with. The announcement came during the opening keynote of Google's annual I/O developer conference held in Mountain View, California on Tuesday, May 20, and focused on showing off the company's latest advancements in AI, Android, augmented reality, and more.

Over the coming weeks, users in the US will start to see a new AI Mode tab in Google Search and as a button in the search bar within the Google app.

While Google on Tuesday drew the curtains back on several new AI products, including the company's most advanced image and video generation models, AI Mode in Search was the big news to come out of I/O 2025 for two main reasons.

Google has long dominated the search engine market, shaping the structure of the internet through the rise and fall of content driven by its search engine. But this dominance has come under threat recently with the rise of AI chatbots that have emerged as a viable alternative to looking up information online.

In this context, AI Mode is billed to be the future of Google Search as it moves away from showing users a list of blue links on a web page to providing an end-to-end search experience. However, Google is also facing a prominent antitrust challenge where the US government is pushing for the company's search business to be broken up after a district court ruled last year that Google had an illegal monopoly of the online search market.

AI Mode is powered by a custom version of Google's Gemini 2.5 frontier model. "AI Mode is where we'll first bring Gemini's frontier capabilities, and it's also a glimpse of what's to come," Elizabeth Reid, vice president and head of Google Search, said in a blog post.

Searching in AI Mode is different from the typical search on Google as users can dive deeper into the web by asking follow-up questions and finding hyper-relevant content that matches their search query, according to Google. In order to display more helpful responses with web links, AI Mode relies on a query fan-out technique, where AI breaks down the search query into sub-topics and further initiates a multitude of search queries on the user's behalf.

At I/O, Google also announced new capabilities of AI Mode that will become available to approved users under Google Labs in the coming weeks and months.

One such feature is Deep Search, where AI Mode uses the same query fan-out technique to issue hundreds of searches and gather information across sources in order to generate an 'expert-level' research report with citations. This entire process will take minutes, Google claimed.

With Search Live, users can have a back-and-forth vocal conversation with the AI chatbot about what they see on their phone screen or through their phone's camera. AI Mode will also come with certain agentic capabilities. For instance, when a user asks to book tickets or make restaurant reservations in AI Mode, it will kick off a query fan-out process by scanning several sites and presenting the user with various options.

AI Mode will also provide a better shopping experience for users by showing them products and product details in an easy-to-browse panel, along with a virtual try-on feature, AI agent-driven price tracking, and autonomous checkout. This suggests that Google is going toe-to-toe with challengers like OpenAI which recently rolled out its own shopping update to ChatGPT.

In addition, AI Mode will also have the capability to analyse datasets and real-time information to generate graphs, charts, and other visualisations.

During the Google antitrust search remedies trial, AI prominently featured in the arguments made by both sides.

The US Department of Justice (DOJ) essentially argued that Google's new AI search products were just another way to lead users to its search engine and thereby extend its dominance of the online search market. It also warned that Google would come to dominate the AI space, the same way it has dominated the search market, if the court did not take any action.

Google, on the other hand, argued that there is growing competition in AI by pointing to the successes of OpenAI's ChatGPT and others. It called witnesses like Eddy Cue, an Apple executive, who suggested that AI was shrinking the antitrust threat posed by Google in search. Cue's testimony, however, tanked Google parent Alphabet's stock by eight per cent after he revealed that search volume to its Safari browser (which runs on Google's search engine) had declined for the first time in 22 years.

To reassure shareholders on the threat posed by AI chatbots, Google quickly issued a statement saying that overall queries in Search have continued to grow, and that users are accessing its search functionality in different ways.

At Tuesday's I/O event, Google's announcements largely echoed these arguments. It re-emphasised that "there's been a profound shift in how people are using Google Search" with more than 1.5 billion people using visual search via Google Lens every month. "In our biggest markets like the US and India, AI Overviews is driving over 10 per cent increase in usage of Google for the types of queries that show AI Overviews," it said.

However, the accuracy of AI-generated search results is still under question as large language models (LLM) are prone to hallucinations. There are also concerns that Google may further eat into click-through rates as it leans more heavily on AI-generated search results. This would be bad for publishers and content creators who rely on traffic from Google Search.

In terms of privacy, AI search engines could increase user tracking to gather more detailed feedback in order to improve search results. For instance, AI Mode has a personalised context setting which enables it to pull information from other connected Google apps like Gmail to show tailored results. However, Google has said that this will be an opt-in feature, and that users can choose to connect or disconnect the apps with AI Mode at any time.