

The AI web

RACE TO
Zero
UI



Contents

The internet's newest tipping point

Generative AI is ushering in a massive shift in how people research, shop, and make decisions online. Rather than solely relying on visiting websites or sifting through search engine results, consumers are now increasingly interacting with the internet via non-traditional interfaces.

With Zero UI, the internet is no longer confined to a screen: it's becoming integrated into everyday life in more meaningful ways. At the heart of this shift is the rapid maturation of generative AI.

For marketers, this means adapting to multiple shifts at once. Rather than waiting until expectations are set, understanding the arc of adoption early allows brands to experiment, learn what consumers want, and even help define new possibilities.

The past, present, and future of the web

Before we look at the future, here's a brief recap of the internet's evolution and what each tipping point has meant for consumers and companies.

As the internet has evolved, each era has been defined by how people access and engage with information...

Early internet era (1990s)

Key traits: Access

Interaction types: Visits and downloads

Examples: Static websites, message boards

Search (2000s)

Key traits: Intent

Interaction types: Queries and results

Examples: Google, Yahoo, Bing

Mobile (mid-2000s–mid-2010s)

Key traits: Connection

Interaction types: Apps and alerts

Examples: Smartphones, app stores

Social (2010s)

Key traits: Identity

Interaction types: Followers and content

Examples: Facebook, Twitter, YouTube

Streaming (2020–present)

Key traits: Attention

Interaction types: Views and engagement

Examples: Netflix, Disney+, Prime

AI (2023–future)

Key traits: Context

Interaction types: Conversations and agents

Examples: ChatGPT, Copilot, Anthropic, Gemini

The attention economy

In the past five years, the rise of short-form video culture has shifted the focus from social connection to content consumption and attention. The feed has evolved into a constant stream of personalized entertainment where creators, audiences, and brands converge.

Algorithms, creators, and engagement metrics have defined success and reshaped the internet into a mass media experience that's endlessly scrollable and hyper-visual.

You are now here: The AI web

Today's tipping point is that generative AI transforms the internet from **searching and scrolling** to **asking and co-creating**.

Large language models (LLMs), copilots, and personalized agents (like [Brand Agents](#)) turn content into conversation, filtering the infinite web through individual context.

The result



Everything converges into a **single, dynamic experience**—a generative interface that adapts to intent, moving beyond simple responses to create fully realized, action-oriented systems.



Introducing Zero UI

Enter Zero UI (“Zero user interface”), a term that describes tech-enabled interactions that bypass traditional interfaces and instead favor AI-powered chat, voice, and smart devices like smart speakers or wearables.

This transformation will redefine how consumers interact with brands:

Consumers

...will **expect simplicity and convenience, personalized answers, and action from brands.**

People

...will **increasingly rely on talking** via AI voice assistants, chat platforms, smart devices, and multimodal search.

Brands

...will **begin to compete with context, not content.**

I truly believe we can create a calmer, more helpful, and more supportive era of technology, quite unlike anything we’ve seen before.”

Mustafa Suleyman

CEO,
Microsoft AI



Our research: Are consumers ready for Zero UI?

Microsoft Advertising surveyed **1,000 US consumers** to gauge Zero UI readiness¹, interest, and adoption, and asked what they think about the relevance of various use cases.

The findings throughout this report look at current and future adoption, consumers' trust and comfort levels, what people expect from brands, and how companies can prepare for a future without websites. For example:



Nearly
60%

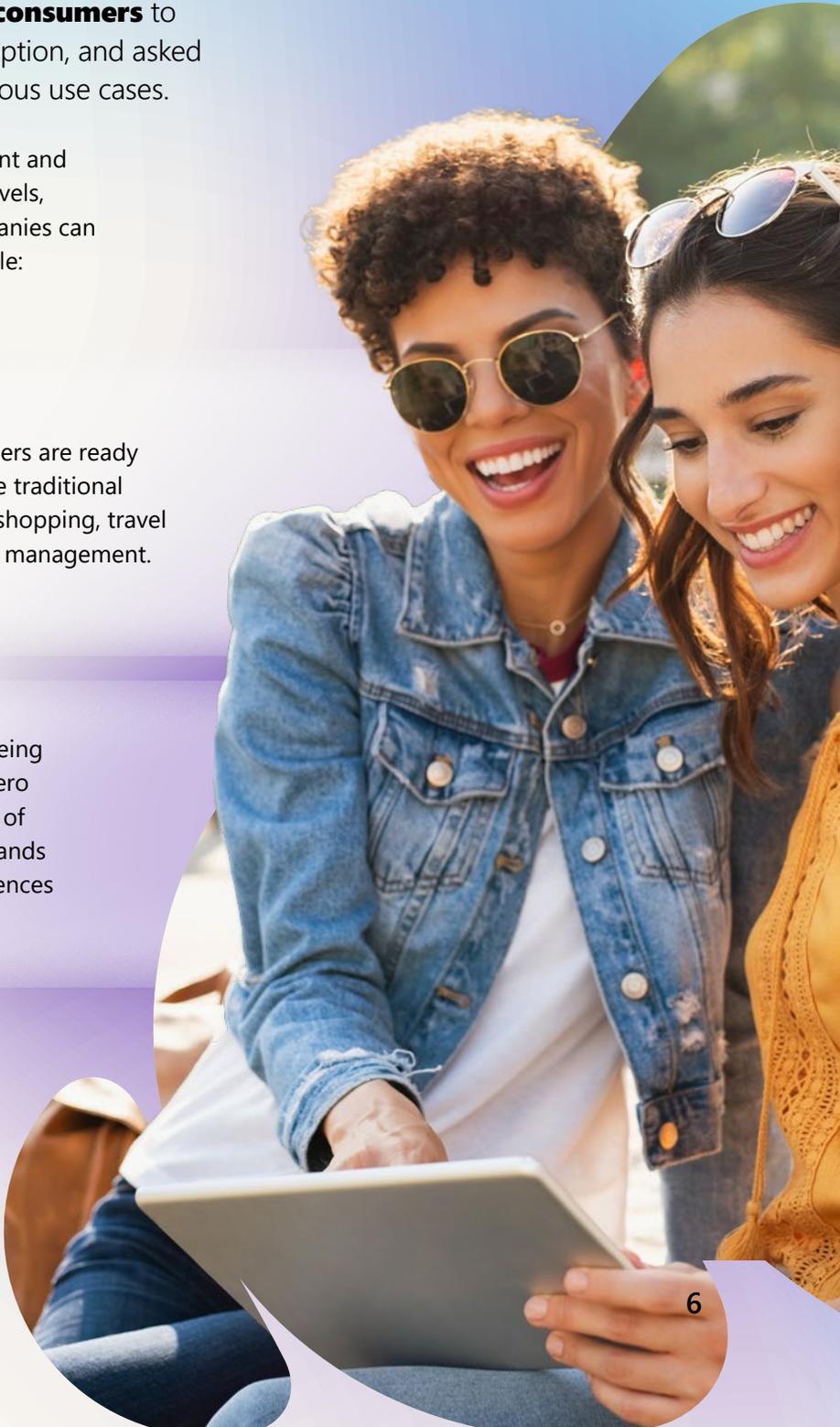
Nearly **60%** of consumers are ready for AI agents to replace traditional websites for tasks like shopping, travel planning, and financial management.



Over
70%

Looking ahead, after being introduced to future Zero UI concepts, over **70%** of respondents expect brands to deliver these experiences within the next year.

1. Microsoft Advertising, Rebuilding of the Web: How Consumers Are Adopting Zero UI, FY26 Consumer Research. Based on a 15 minute online study of approximately 1,000 U.S. consumers conducted August–September 2025, examining consumer readiness, trust, adoption timelines, and use cases for Zero UI and agentic digital experiences.



Why agentic experiences matter

The design shift is also a behavioral shift, increasingly enabled by agentic systems. These interactions may be informed by personal preferences and other signals or context based on the company, use case, and situation.

SPEED OF

generative AI innovation

By 2028, **70%** of customer journeys will occur entirely through AI driven conversational interfaces (Gartner, 2024).

COMFORT WITH

conversational experiences

Smart device adoption is surging, with **30%** of consumers using voice assistants and smart home devices daily and **45%** using them weekly.

RISE OF

agentic experiences

33% expect brands to offer agentic experiences within 6 months; **27%** more within a year.

One size does not fit all: Three types of tech adopters

Not all consumers are adopting Zero UI at the same speed. Some are eagerly moving ahead with new tech products and platforms, while others remain hesitant or even resistant.

To understand consumers with varying levels of comfort, we identified three types of tech adopters:

High (30%)

Households with 5+ smart or AI-enabled devices

Moderate (40%)

Households with 2–4 devices

Low (30%)

Households with 0–1 devices



Designing and deploying Zero UI experiences people trust and use requires brands to understand each type of adopter's actions, interests, incentives, and concerns.

How tech adoption affects Zero UI readiness

Here's some of the ways consumers differed in their responses based on their level of tech adoption. This information can help brands build new consumer archetypes based on the experiences they resonate with.

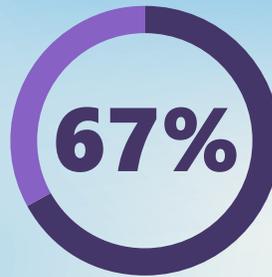
	HIGH	MODERATE	LOW
 Willingness to use Zero UI	More willing (and eager) to interact with Zero UI experiences from brands.	Split between their interest in (and willingness to try) Zero UI experiences and sticking with what they're familiar with.	Prefer visible and manual control of experiences. Still reliant on screens and traditional methods of interaction.
 What they expect from brands	Tend to have higher standards than others, for both what they want and what they're wary about.	Can benefit from more education and guided exploration.	Find ways to introduce them to assistive, low-risk features that are opt-in and easy to use.
 How to tailor Zero UI to them	Build advanced agentic experiences for tech-forward users that engage with (and even reward) their sophistication.	The key is balancing novelty and familiarity without changing too much too soon.	Spend more time simplifying setups, emphasizing safety and security, and explaining benefits and how tech works.

The race to Zero UI

The shift to Zero UI is already happening

Search is evolving from links to answers. Trust in social platforms is waning. AI models are upending the creator economy. Content is being both democratized and diluted. Instead of browsing the web, people are chatting with it.

Consumers are increasingly interested in conversational experiences, and brands are responding by investing to meet this growing demand.



67% of people either like using automation for simple tasks or “love it” for making life “easier and more efficient.



54% of people are comfortable with AI chatbots and conversational search.



61% of people are comfortable with voice commands.



More than half of websites already use schema.org to encode for SEO structure content.

Conversational experiences as stepping stones



Multimodal search and visual discovery

Consumers are searching with images and videos instead of just words.



Voice interactions

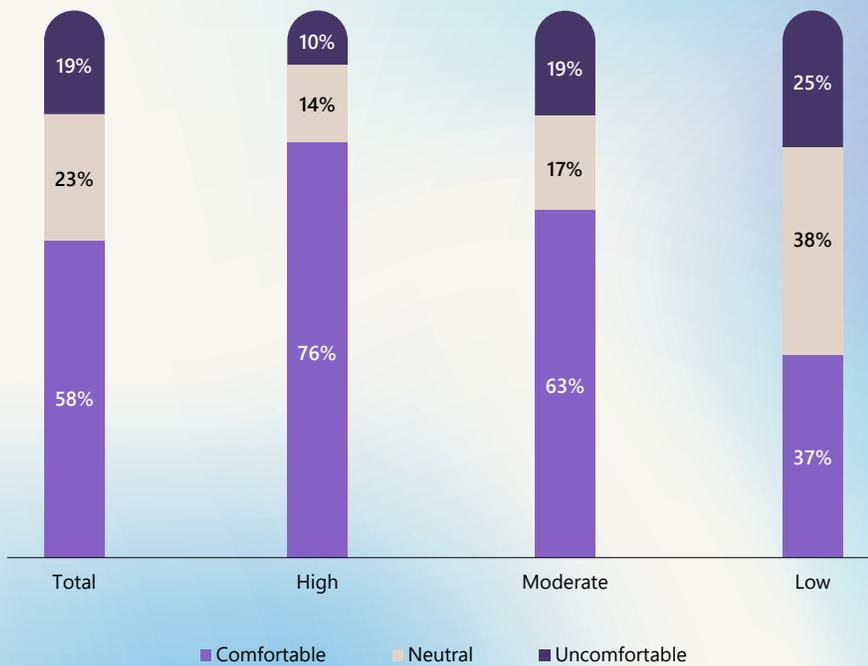
People are moving on from just playing music, setting timers, and making calls via voice assistants and smart speakers. Some are also using them for commerce—like buying products, sending money, and re-ordering items—with adoption highest among tech-forward users.



Agents

The majority of consumers express comfort with using AI agents instead of traditional websites.

Comfort with agentic experience



Major shifts defining the race to Zero UI

To sum it all up, these changes are powering several major shifts that advertisers must recognize:

KEYWORDS → CONVERSATIONS

Search results are changing from links to answers.

PERFORMANCE → PRESENCE

Utility now matters more than impressions.

PLATFORMS → PROTOCOLS

Endpoints and access are key for new audiences.

STATIC → AMBIENT

Experience and presence is prioritized over each event.

IMPRESSIONS → ACTIONS

Being seen is less important than being useful.

BLIND TRUST → EARNED TRUST

Consumers require privacy, control, and transparency.

INPUTS → INTENT

What people press is less valuable than inferring what they express.

VISIBLE → INVISIBLE

Traditional UI fades away in favor of voice, chat and agents.

AUTONOMY → AUTOMATION

Control is less driven by users and more delegated to agentic systems.



The stakes are high for brands

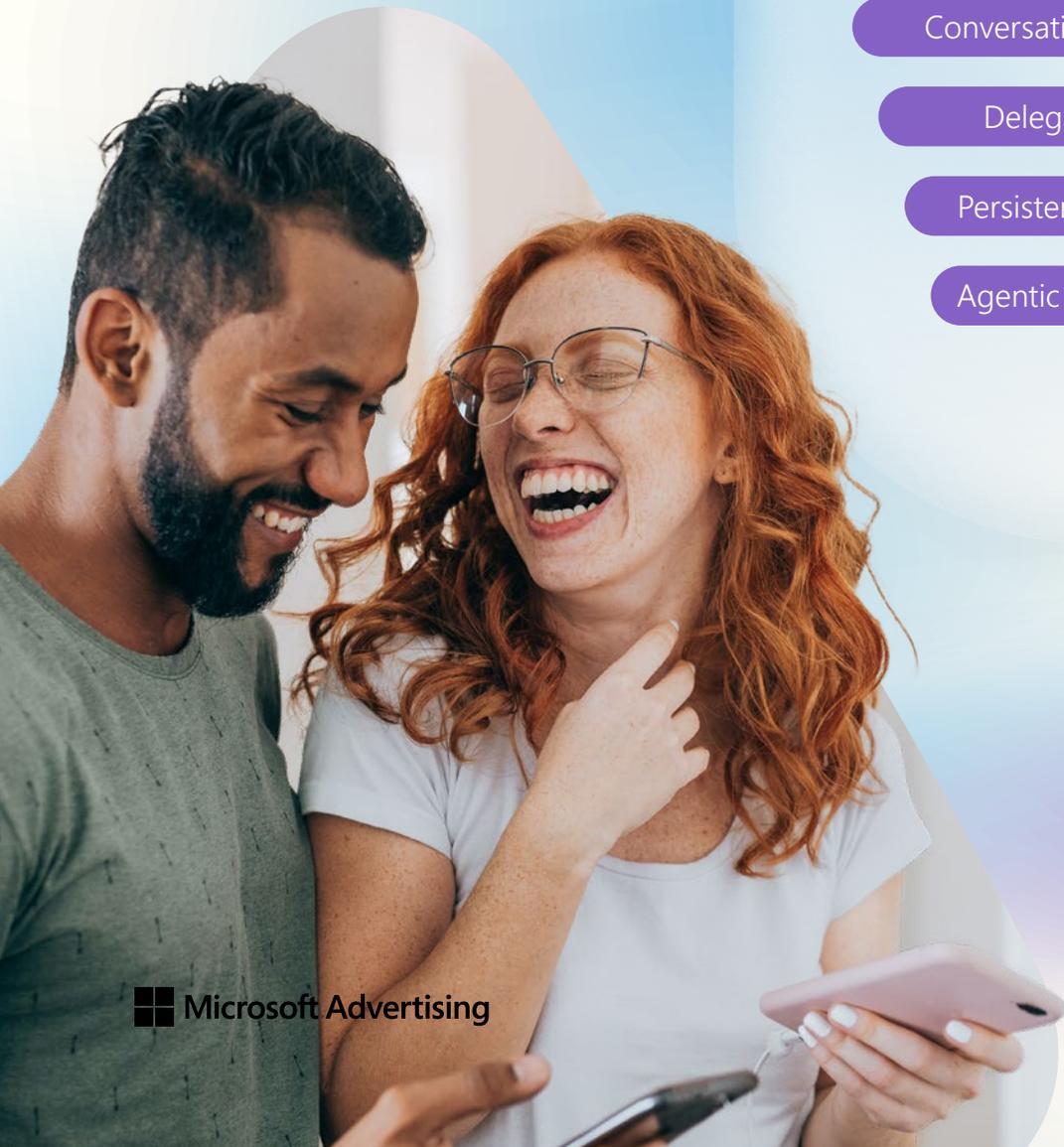
From theory to reality: The potential of Zero UI might seem theoretical, but AI agents are already changing how people search, research, and shop.

User adoption isn't happening all at once or in the same ways. With an evolving marketing funnel that's less linear, brands need to know when, how, and why consumers are using generative AI to build engagement and trust.

Old funnel



New funnel



How brands can prepare for agentic consumers

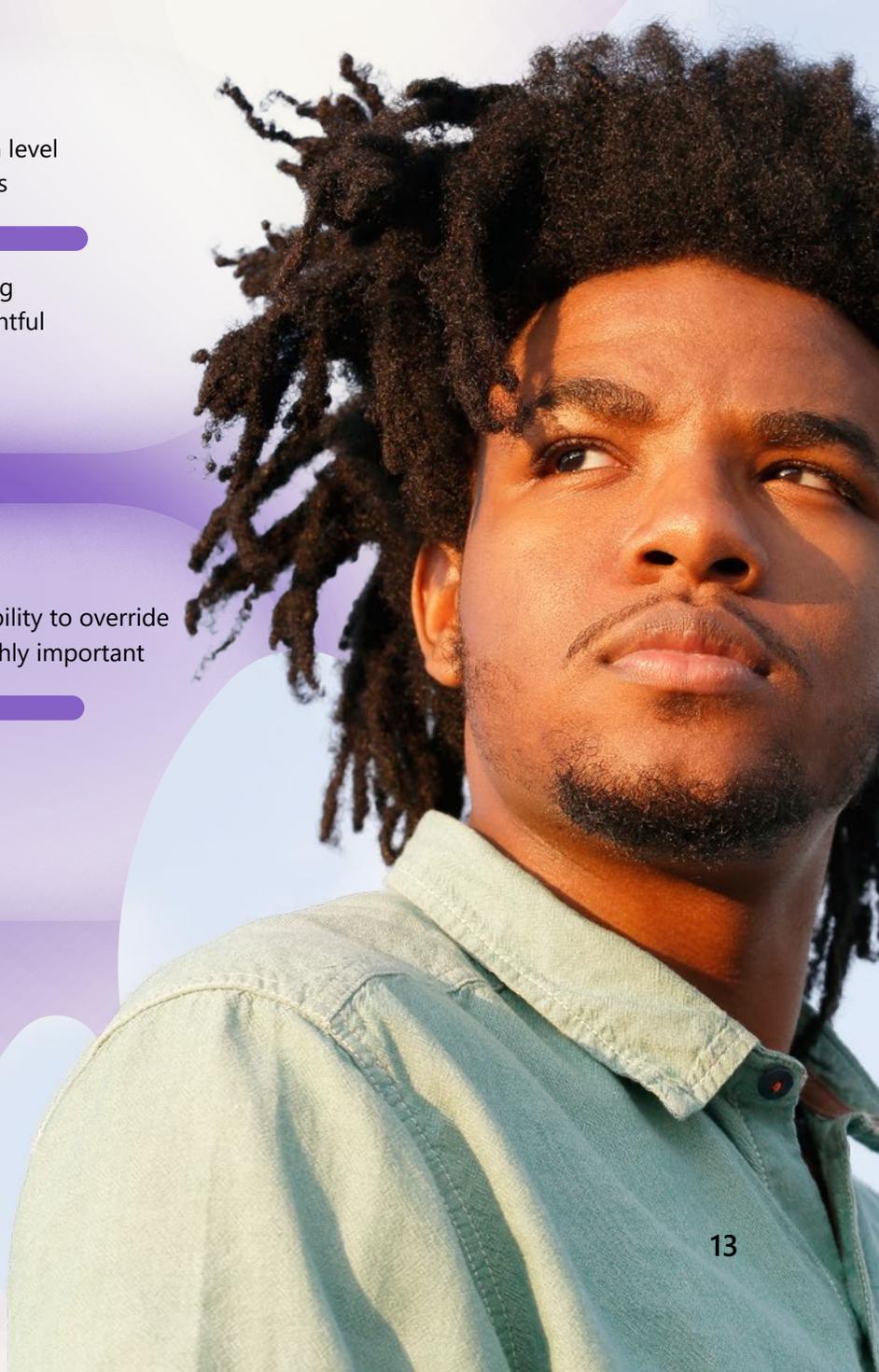
We found that:

38% of consumers have a high level of trust in Zero UI systems

This leaves the majority with concerns, meaning marketers need to ensure they're being thoughtful about how they're providing opportunities to include user control in early rollouts.

over **2/3** of respondents say the ability to override or stop automation is highly important

Manual approval, the ability to review or undo actions, and strong privacy protections are critical to building comfort and trust.



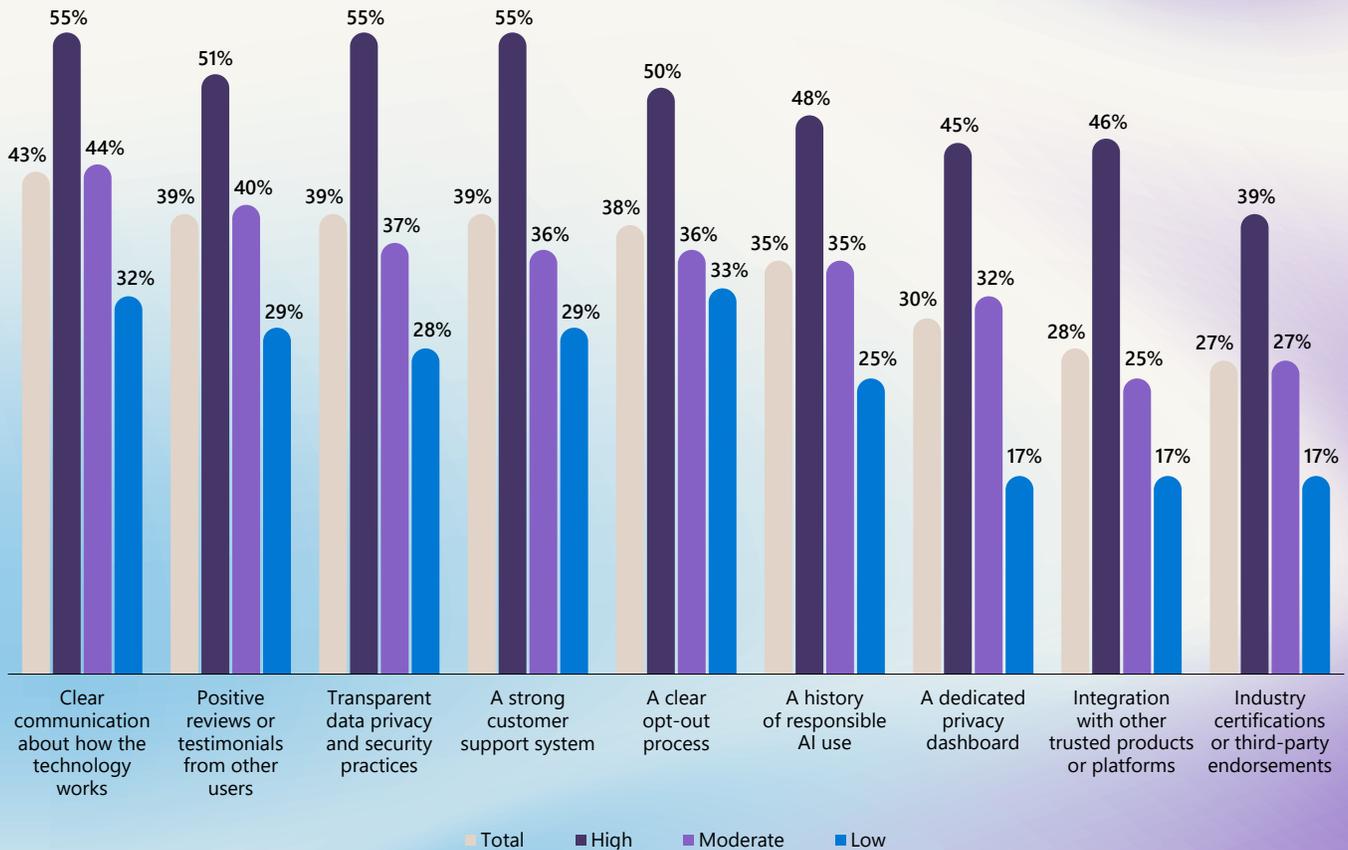
Consumer expectations for credible Zero UI brands

Consumers expect certain fundamentals to be in place before they trust a brand's Zero UI experiences.



Overall, respondents most want **clear communication, positive reviews from others, transparent privacy and security practices, and strong customer support**, among other expectations as seen here.

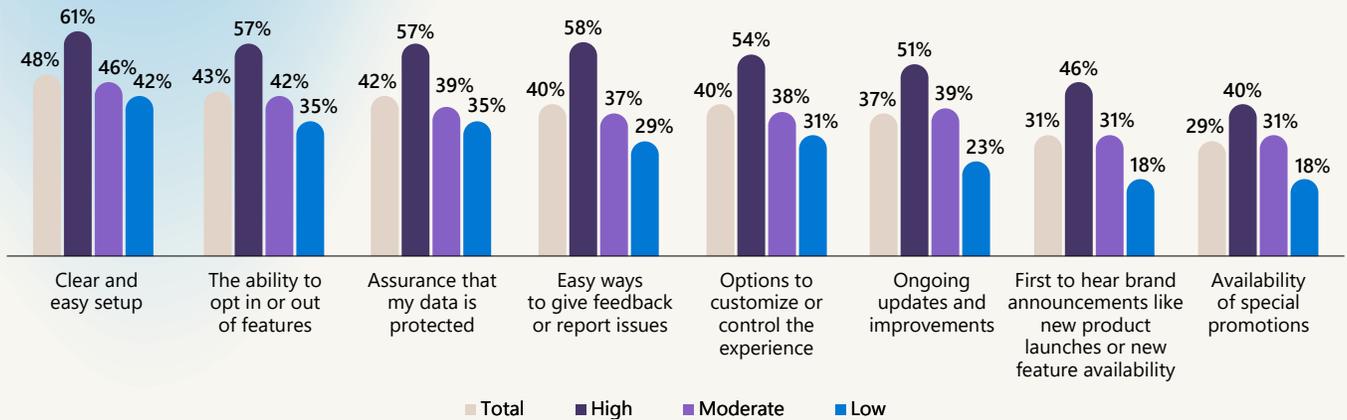
Expectations for brand readiness



Consumer expectations for valuable Zero UI experiences

Once those non-negotiables are in place, consumers expect brands offering Zero UI experiences to provide simplicity in setup, flexibility in opting in or out of features, and assurance of data security, among other preferences seen here.

Expectations for Zero UI experience

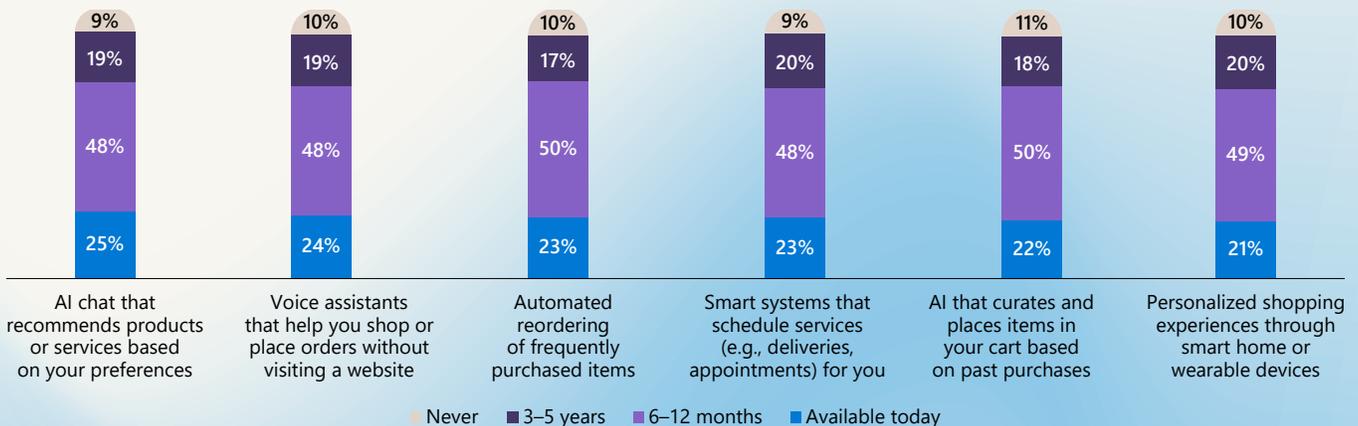


Consumer expectations for timing of Zero UI features

Knowing when consumers expect various Zero UI experiences is as important as understanding what they want and how they want it.

Here are six features most consumers expect brands to offer now or within the next year to help with shopping or digital services:

Timeline expectations



Brand verticals expected to lead Zero UI adoption

Consumers expect Zero UI now and in the near term. Yet the timing of when they are ready to see—and engage with—Zero UI experiences changes based on what aspect of everyday life they're navigating.

Here's when consumers expect brands in the following industries to start offering these types of experiences:

Current expectations

A year from now

GROCERY

31% of consumers expect them today

44% in the next 6–12 months

APPAREL AND ACCESSORIES

24% of consumers expect them today

48% in the next 6–12 months

HEALTH AND WELLNESS

24% of consumers expect them today

50% in the next 6–12 months

TRAVEL

21% of consumers expect them today

52% in the next 6–12 months

FINANCIAL SERVICES

20% of consumers expect them today

48% in the next 6–12 months

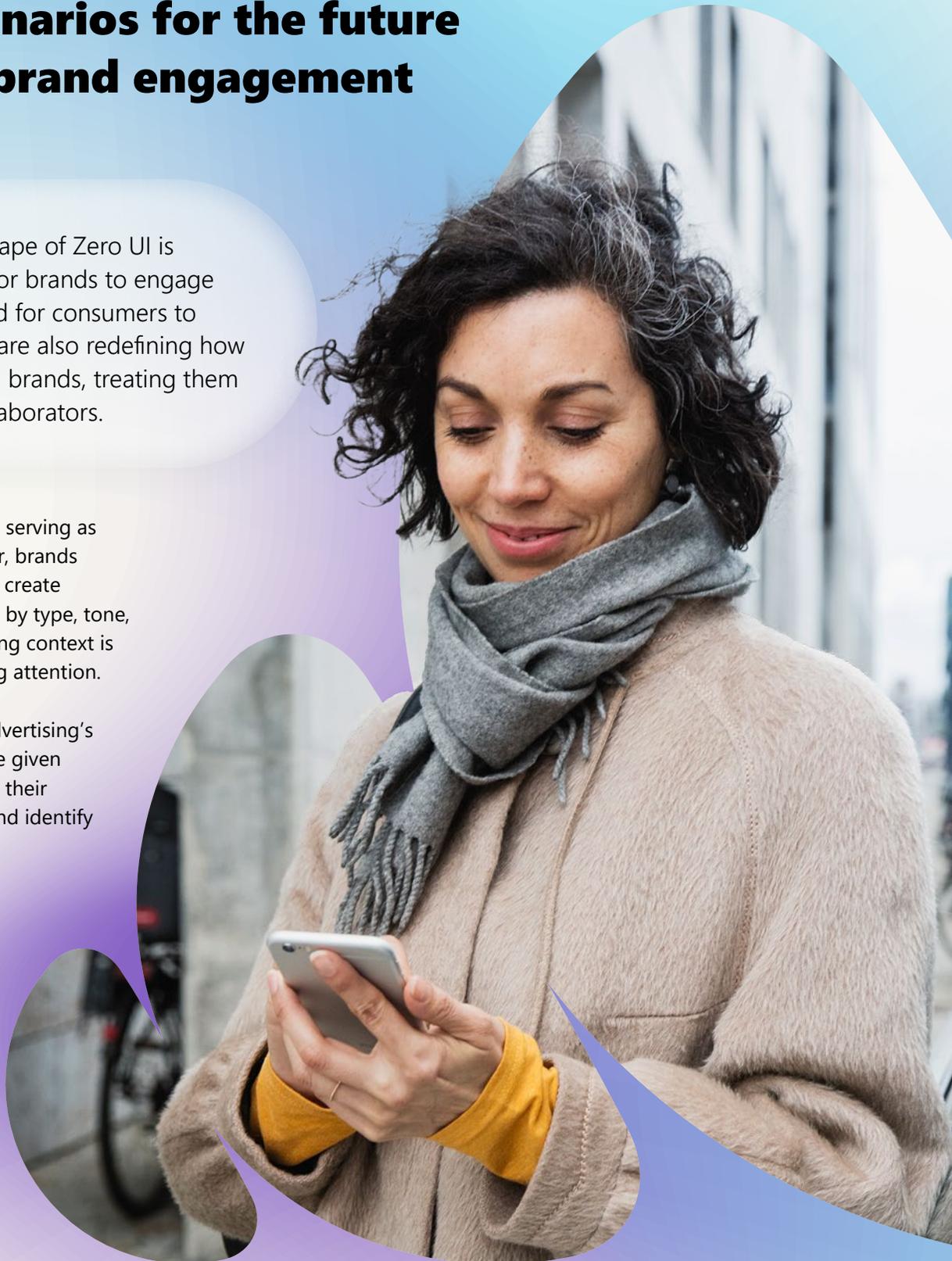


Scenarios for the future of brand engagement

The evolving landscape of Zero UI is creating pathways for brands to engage with consumers, and for consumers to respond. The shifts are also redefining how people engage with brands, treating them as curators and collaborators.

Instead of a homepage serving as the universal front door, brands have an opportunity to create conversations that vary by type, tone, and topic. Understanding context is as important as winning attention.

As part of Microsoft Advertising's survey, consumers were given five scenarios to gauge their comfort with Zero UI and identify what would improve it.

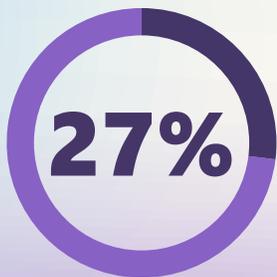


Brand scenario: Travel shopping via chatbot

As Zero UI changes how people research and plan trips, survey participants were shown a hypothetical travel brand called "EcoTrails," which offered a chat-based interface experience instead of a traditional homepage.



58% of respondents said they would be comfortable interacting with an AI agent in this way

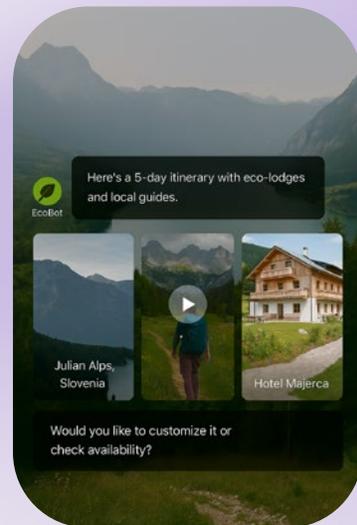
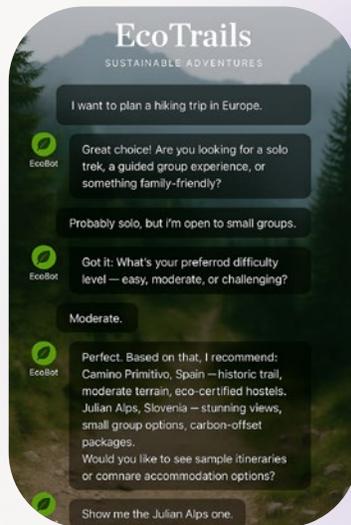
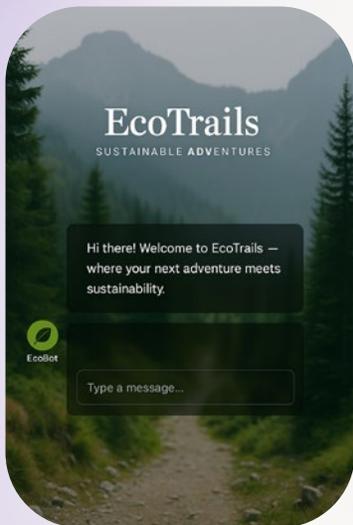


Respondents were split on whether they preferred the agent vs. a traditional website, with 27% feeling neutral



However, 51% of tech-forward users preferred the agent to a traditional website

ECOTRAILS EXAMPLE



Brand scenario: Car shopping via voice assistant

In this scenario, consumers imagined car shopping with a voice assistant instead of a car website or dealership visit. When they imagined giving a voice prompt with key criteria—such as a fuel-efficient SUV under \$40,000—the assistant offered options as well as follow-up questions and to schedule test drives.



of respondents said they would be comfortable with this experience



would be likely to try it if it were available today

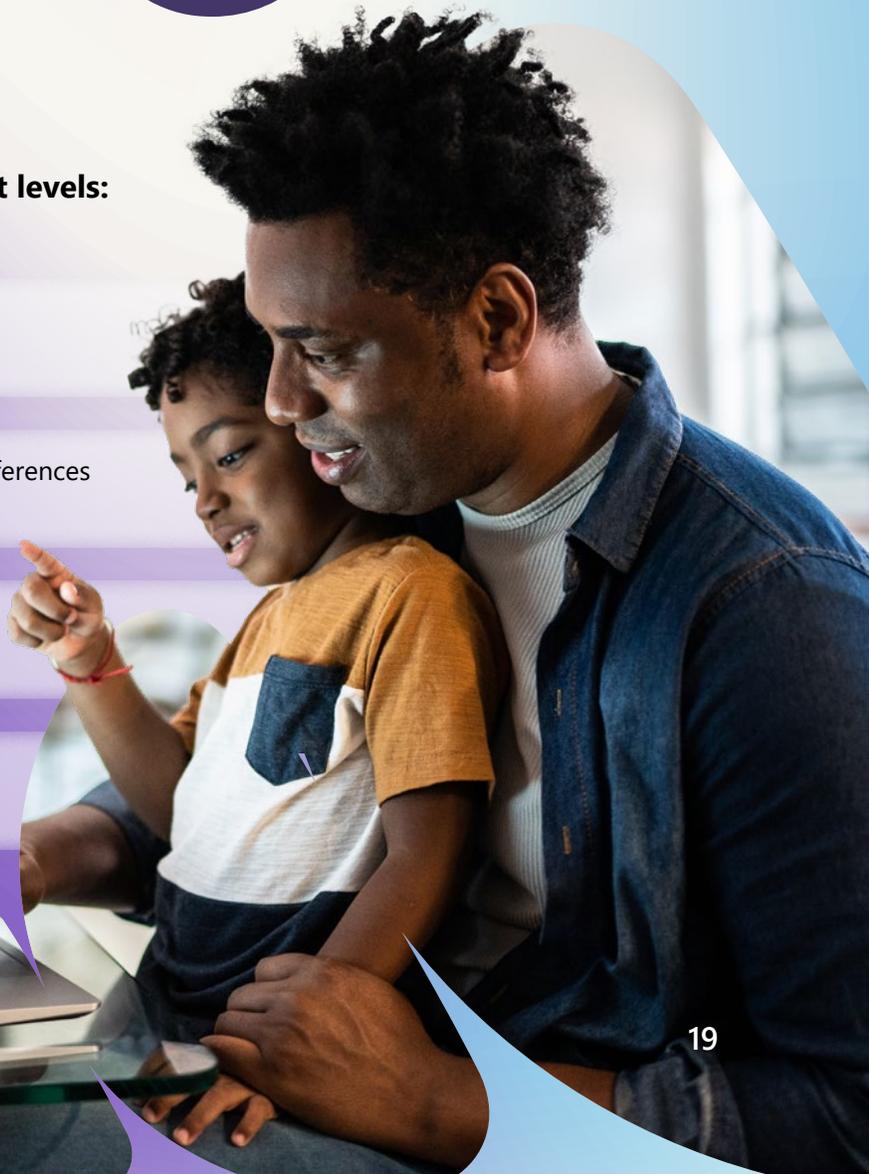
When asked what would increase comfort levels:

41% Having the option to review information visually

41% Ensuring personal data and preferences are kept private and secure

41% Having the ability to speak with a human if needed

38% Having the ability to override or adjust choices at any time



Brand scenario: Wardrobe shopping via voice assistant

Instead of browsing fashion websites or social feeds, consumers imagined relying on a voice assistant to help update their summer wardrobe. The agent would curate outfits based on size, budget, preferences, and past purchases, highlight price points and sustainability features, and offer options like sending items to a shopping cart, phone, or Pinterest board for review.



58% of respondents said they would be comfortable with this experience



59% would be likely to try it if it were available today

When asked what would increase comfort levels:

41% Having the ability to review and edit the cart before purchase

39% Having full control over budget, brands, and styles

37% Receiving outfit previews before they're added to the cart

35% Knowing how the assistant uses my past preferences/purchase history



Brand scenario: Grocery shopping via a smart pantry

Consumers envisioned a smart pantry that automatically reorders essentials from their preferred stores when items are low. The agent would also manage deliveries and payments.



of respondents said they would be comfortable with this experience



would be likely to try it if it were available today

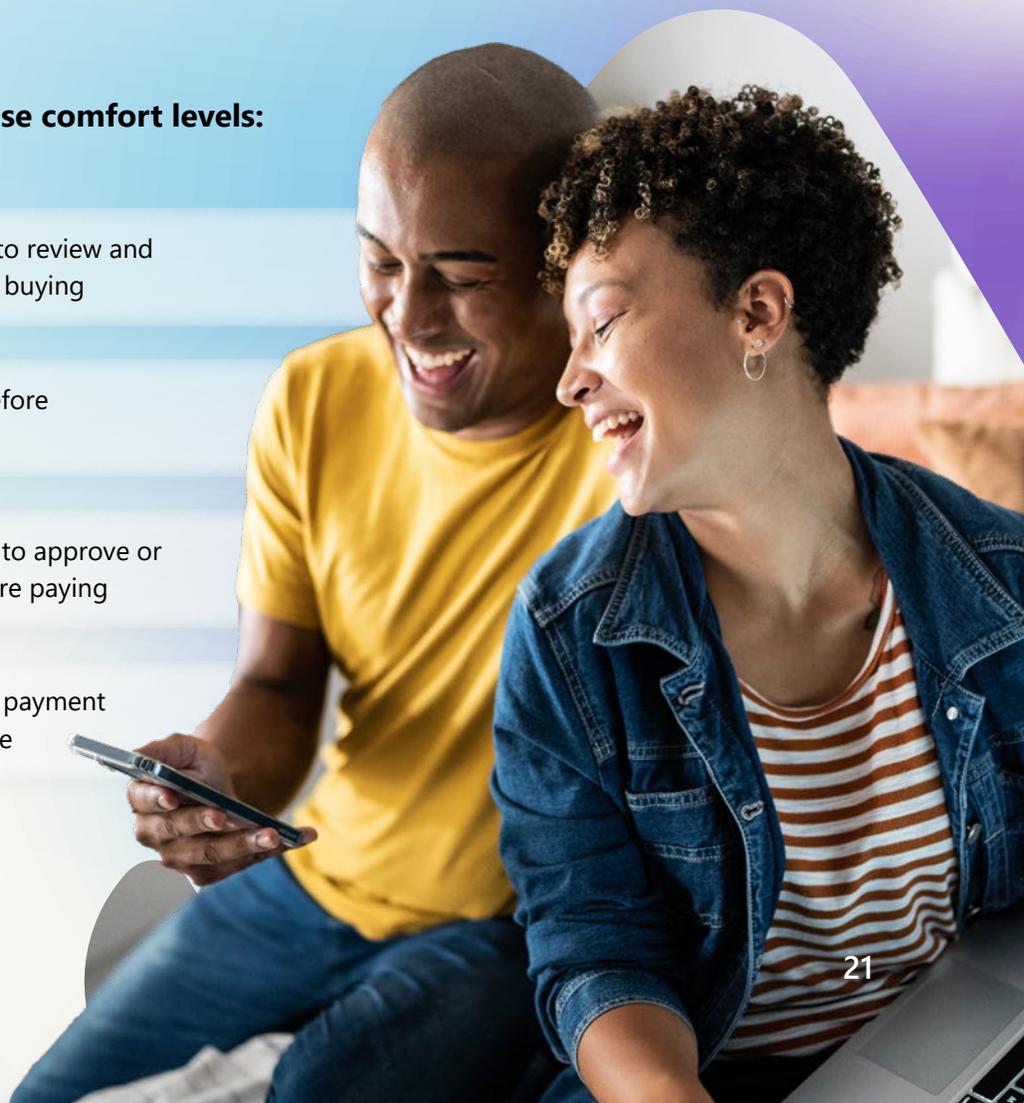
When asked what would increase comfort levels:

37% Having the ability to review and edit the list before buying

34% Receiving alerts before orders are placed

33% Having the option to approve or cancel orders before paying

33% Knowing date and payment methods are secure



Brand scenario: Financial management via an AI assistant

Participants imagined a financial AI assistant that could reallocate their savings to higher-yield investments without asking, with decisions based on market trends and users' risk profile.



of respondents said they would be comfortable with this experience



would be likely to try it if it were available today

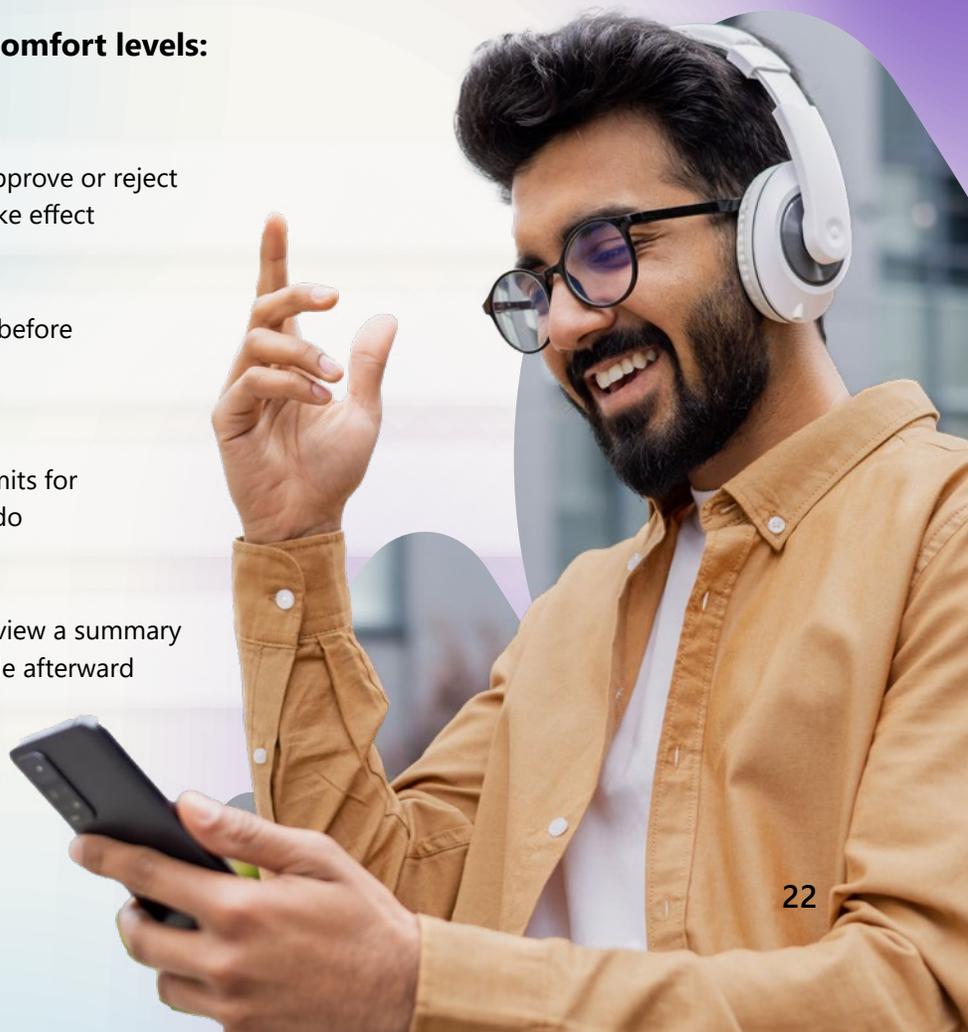
When asked what would increase comfort levels:

39% Having the option to approve or reject changes before they take effect

35% Receiving notifications before adjustments are made

32% Setting clear rules or limits for what the assistant can do

30% Having the ability to review a summary of changes and rationale afterward



Consumer hesitancy still exists

Even as comfort grows, there's still a cohort of consumers who expressed hesitancy for Zero UI, with higher levels of caution for financial experiences. People want control, particularly when higher-stakes transactions are involved, showing a clear need for brands to do more to build trust.



32%

Financial experience



22%

Wardrobe experience



21%

Grocery experience



18%

Auto experience



Driving trust in Zero UI

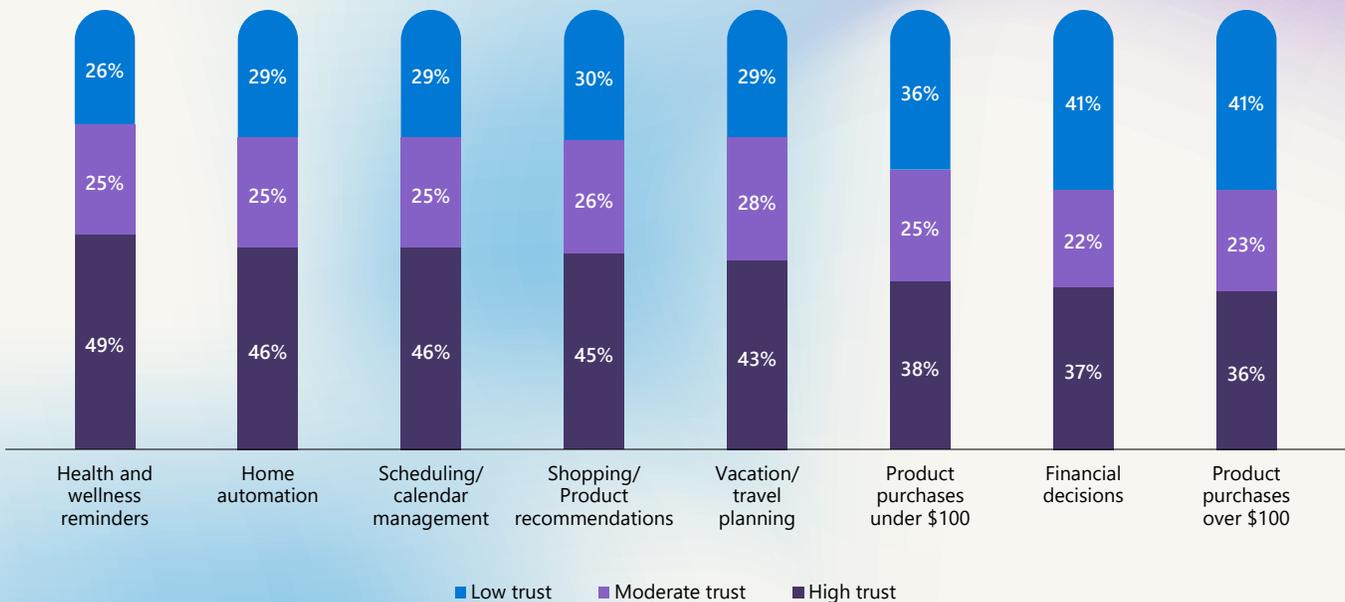
Most people believe that Zero UI systems are reliable (69%), especially among more tech-forward respondents. Yet, as shown in the previous scenarios, many still aren't comfortable with Zero UI systems acting on their behalf without permission. So how can brands increase comfort levels and trust?

What consumers trust—and what they don't

For now, consumers are most comfortable with low-risk applications of Zero UI, such as scheduling reminders, product recommendations, and trip planning.

They're less trusting of Zero UI for higher-stakes actions and decisions that involve money, such as purchasing products and making financial decisions.

Trust Zero UI systems to make decisions in the following...



Trust in automation still progressing

When it comes to automated Zero UI experiences, consumers are more trusting in the following circumstances:



Explicitly approved tasks



Repetitive or routine tasks



When they're busy or multitasking

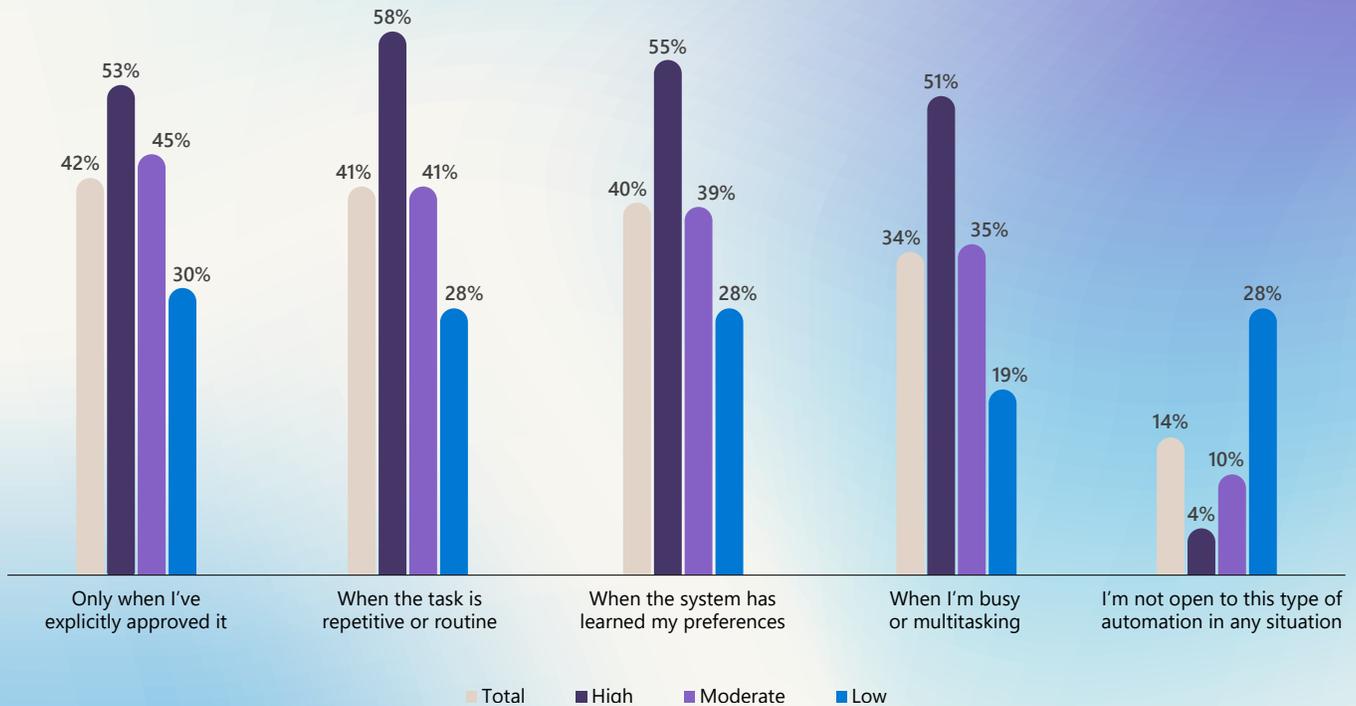


When they can override the automation



When the system has learned personal preferences

When open to using Zero UI automation



What hurts trust vs what builds trust

Brands that understand consumer concerns can avoid risks that might harm relationships and turn potential issues into trust-building opportunities.

Notably, tech-forward users reported higher levels of concern across every category due to understanding both the potential benefits and limitations.

BRAND OBSTACLES (TOP CONCERNS WITH ZERO UI TECH)

49%

Privacy and data security issues

45%

Loss of control over decisions

44%

Misunderstanding preferences

36%

Over-reliance on automation

34%

Lack of transparency

BRAND OPPORTUNITIES (TOP CRITERIA FOR IMPROVING TRUST)

43%

The ability to review or undo actions

32%

Strong data privacy and security protections

29%

Manual approval before actions are taken or a trial period to test the system

Trust as a bridge between people and systems

Even as consumers grow more concerned about data privacy and platform misinformation, brand trust can help lay the groundwork for intentional interactions. Achieving trusted AI requires strong alignment between technological integrity and human intentionality.

Technological integrity

How reliable is your data?

How safe is your system?

How well do you fulfill promises and intent?

Human intentionality

Can I trust this brand?

Is this brand aligned with my values?

Will this agent protect me or exploit me?

A brand playbook for Zero UI

Zero UI is already changing how consumers interact online, but it's early enough for brands and publishers to shape it—and even stake a claim. The sooner brands and publishers develop and test Zero UI experiences, the better positioned they'll be to build features consumers want in this new era of engagement. Conversational AI offers an innovative way to capture attention with context instead of competing in the crowded scroll of social media.

From reaction to anticipation

The new form of engagement won't be person-to-website, but instead agent-to-agent. This means brands need to move from designing for attention to designing for action.

STAGE	REACTIVE AI		ANTICIPATORY AI	
	CATEGORY	EXAMPLE	CATEGORY	EXAMPLE
Trigger	Waits for user input	User search for flights	Predicts needs before input	AI suggests flights based on past trips
Focus	Responds to keywords	"Thai food near me"	Knows context, behavior, and patterns	"It's Friday—want to reorder your usual takeout?"
Timing	After action	Shows options after browsing	Acts before user initiates	Recommends offers based on upcoming calendar event
Experience	Task-based	Fills form after user clicks	Journey-aware and adaptive	Pre-fills info based on history and context
Value delivery	On request	User asks for help, then get it	Proactively surfaced	AI offers support or content without being prompted

The future of content—from static to agent-ready

Curation matters as much as creation: To thrive in the Zero UI era, brands need to create content that's structured, discoverable, trusted, value-driven, and ready for both people and AI agents.



Structured content

Make sure content is understandable by systems, but tailored for humans.



Contextual creation

Prioritize immediate availability over planned schedules.



Trusted voices still matter

With a focus on trust and transparency, brand and creator authority still drive success.



Design for the invisible

New tools are helping to simplify the process of optimizing for LLMs and agents, placing the potential for an AI-powered website within reach of any sized business. For example, Microsoft's Natural Language Web (NLWeb) framework bridges the gap and enables websites to transform existing content into natural language interfaces powered by AI.



New metrics for the new era

The era of agents and automation will also lead brands to find and require new metrics that can measure intent, trust, accuracy, and transparency. Old KPIs like clicks, impressions, and bounce rates were designed for screens but no longer apply in Zero UI experiences.

Here's what's next and the questions to ask:

Completion,
not clicks

This is the new baseline:
Did the experience fulfill the user's intent?

Confidence,
not impressions

This is the new barometer. Did the interaction earn trust?

Continuation,
not bounce rates

This is the new loyalty metric: Did it deepen engagement and open a door for what's next?

Four ways to take action today

01

Build your Brand agent

02

Build agents, your way

From low-code to pro-code, [Microsoft has the tools for you to develop the right agent for your needs.](#)

03

Make sure your content is discoverable in the AI Web

Learn more about [how to optimize your content for inclusion in AI search.](#)

04

Participate in Copilot merchant feeds

Learn more about our [Copilot Merchant Program](#) and [Copilot shopping experiences.](#)

Activate Brand Agents

Brand Agents are turnkey AI shopping experiences designed to communicate in your brand's voice, drive higher cart conversion, and turn everyday shopper questions into meaningful conversations.

Discover

...**products** and relevant add-ons.

Navigate

...**the purchase journey** with ease

Receive

...**tailored recommendations** based on preferences and past behavior.



Learn more [here](#) and join the waiting list



Visit our [AI Web Hub](#) to learn more



These agents are trained on a brand's product catalogue, guidelines, and tone of voice ensuring every interaction reflects the brand authentically and builds shopper confidence to click "buy."

Integrating Brand Agents into our Shopify store was the best example of AI integration seen to date. Brand Agents learned our inventory and provided recommendations that required little engagement from our team."

Tony Baldwin

CTO,
Alexander Del Rossa

