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GENERATIVE ENGINE OPTIMIZATION:

THE NEW PARADIGM FOR DISCOVERY IN THE GenAI ERA

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EXECUTIVE SUMMARY

Generative AI (GenAI) has graduated since our late-2024 Future of Search report, which declared that "Search" was no longer simply a channel but a wide-ranging set of consumer behaviors occurring across platforms and satisfying many motivations and needs. Since its writing, GenAI has hit the mainstream: consumer-reported usage, overall query volume, and query length and complexity have all increased. Today, GenAI queries represent nearly 25% of searches, with the majority of US consumers noting they are AI users and nearly half of those consumers saying they use it daily.

Search, simply put, looks much different than it did a year ago. And this shift has far-reaching consequences as consumers turn to GenAI for information, advice, comparison shopping and entertainment, engage in full conversations, and, increasingly, don't click away to publisher – or brand – websites.

A new paradigm is needed for brands to meet this moment. In this report, we outline the major changes in consumer attitudes and behaviors around GenAI and Search, how GenAI tech leaders and upstarts are responding, and what steps brands must take to ensure discoverability in this new world. Most notably, embracing Generative Engine Optimization (GEO) has become a new baseline requirement.

GenAI HAS QUICKLY BECOME ENTRENCHED IN THE FABRIC OF CULTURE

Just one year ago, in late 2024, consumers approached GenAI with a mixture of curiosity and caution. Forty-two percent of consumers believed GenAI had a significant impact on their personal lives yet trust remained fragmented—split between excitement about productivity gains and deep concerns about privacy, misinformation, and job displacement. The technology felt separate from daily life, something to experiment with rather than depend on.

Today, that relationship has fundamentally transformed. Nearly all Americans are now using forms of AI, even though a full understanding of its scope remains nascent. Driving this shift is not just technological advancement—it is a profound reimagining of our cultural values, and it is happening fast.

We are witnessing the emergence of new expectations: for technology to understand us emotionally, to amplify our creative potential, to integrate seamlessly into our routines, and to earn our trust through transparency. This acceleration is powered by unprecedented advances in compute. Global AI-relevant compute is projected to grow 10x by 2027, with leading companies accessing up to **40x more compute power than they had in 2024**. That scale means the tools shaping our choices—what we see, buy, create, and believe—will evolve faster than any previous wave of technology. As AI reshapes how we discover and decide, the real story is cultural: what values will guide us in a world where intelligence itself feels abundant?

Below, we highlight **five cultural trends** that illustrate how deeply and quickly these shifts are taking root (Figure 1):

Figure 1

SEVERAL ELEMENTS OF CULTURE UNDERSCORE THE DEEPENING EMBRACE OF GenAI
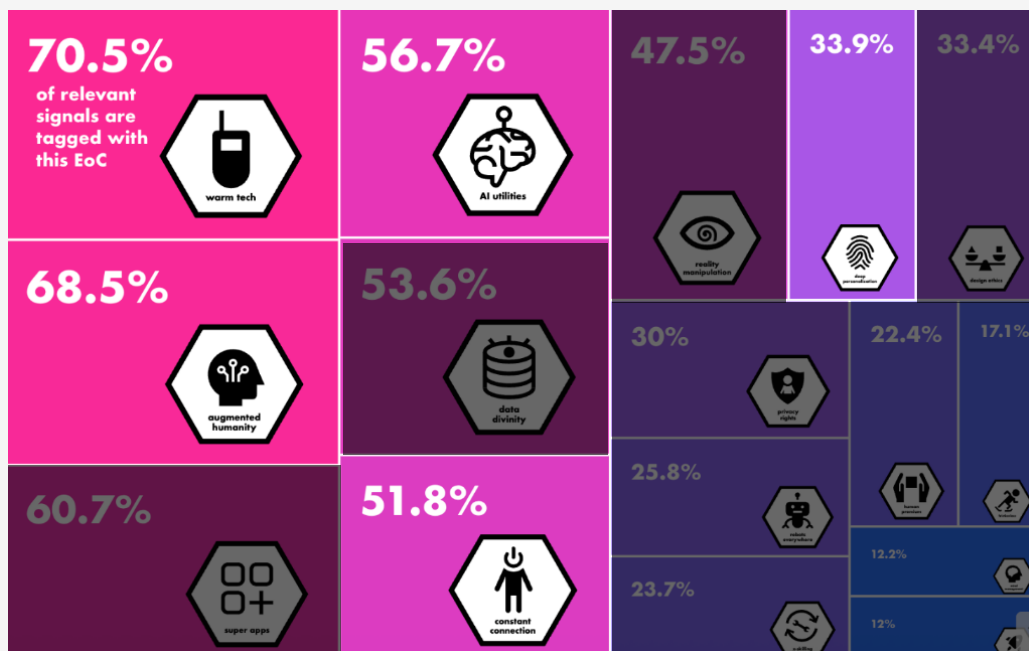
Source: Q

GenAI AND THE FUTURE: KEY ELEMENTS OF CULTURE (EOCS) THAT POP

1 **EoC: Warm Tech (70%)**
We Expect Machines to Care

The boundary between human and machine is blurring faster than we imagined, with a complex set of dynamics and use cases emerging—such as companionship, friendship, and therapy. This will impact all technologies and how brands communicate, as consumers increasingly want technology that listens, responds, and emotes with warmth. The cultural shift: we now value empathy and relational qualities in machines as much as functionality, redefining what "good technology" means.

2 **EoC: Augmented Humanity (68%)**
The Gap Between Thought and Reality is Closing

GenAI is collapsing the distance between idea and execution, and the transition is happening at breakneck speed with more than 80% of content creators leaning on AI. What once required years of training or access to tools can now be produced in seconds. The cultural shift: execution no longer defines value—imagination does. Originality, vision, and intent rise to the top as skills that matter most in a world where creation itself is frictionless.

3 **EoC: AI Utilities (56%)**
Intelligence Becomes the New Electricity

AI is fading into the background: it is not an add-on; it is infrastructure, powering decisions and smoothing friction much like electricity or Wi-Fi. The cultural shift: people expect intelligence to be ambient and always on, moving from a do-it-yourself ethic toward an outcomes-first mindset—what matters is not how we get there but that we get there well.

4 **EoC: Constant Connection (52%)**
Every Object Wants to Think

AI is seeping into hardware—earbuds that translate in real time, glasses that guide people with vision loss, cars that co-pilot decisions. Objects are no longer passive tools but active companions. The cultural shift: we are revaluing material goods not as status symbols but as extensions of cognition, always ready to augment our awareness. What begins with devices will not stop there—this logic is set to transform all technology and media, where every surface, platform, and product becomes intelligent, adaptive, and inseparable from how we think and interact.

5 **EoC: Deep Personalization (34%)**
"Just for Me" Becomes the Standard

AI that tracks emotions, reads biometrics, and adapts in real time is bringing personalization into every corner of daily life. From media and shopping to healthcare and education, people increasingly expect experiences to adjust to their context, mood, and needs. The cultural shift: personalization has advanced from a special feature to a baseline expectation, raising the bar for interactions to feel timely, relevant, and distinctly one's own.

This cultural context forms the foundation for shifting consumer attitudes and behaviors are changing.

In Search, where GenAI is transforming how consumers find and connect with information, brands must rethink how they engage in that conversation.

Nearly a year ago, we argued why it was time for brands to stop thinking of "Search" as a media channel, but rather a wide-ranging set of consumer behaviors aligned to an increasingly broad-reaching set of motivations and needs. We also called out the burgeoning role of GenAI in transforming how and where people searched, and that the instinct to "ask" rather than simple "search" was spreading to more places, including traditional search engines.

If adoption and usage of GenAI seemed notable then, it is remarkable now. Less than one year later, GenAI is becoming truly pervasive as it scales well past early adopters into a much broader user base.

Building on last year's insights and to paint a current portrait of GenAI in Search, OMG Research conducted an online survey via our proprietary OMG Signal panel among 2,404 US adults aged 18–72 during July 2025 to get a current pulse of who's using AI, what they are using it for, and why. Important to note, we asked about AI in aggregate *and* in detail. This includes specific AI chatbots such as ChatGPT and Gemini but also Google's AI Overviews. Additionally, our questions extended to how consumers access these AI tools and environments—by browser or an app.

According to our research, three-quarters (75%) of consumers report using some form of AI; nearly half (46%) of those users engage with it daily, and another 41% weekly. Seventy percent use AI for personal reasons, while 30% use it for professional reasons. Eighty-one percent of users report having up to five exchanges with a generative AI engine on a single topic during one search experience.

> **Three-quarters (75%) of consumers now report using some form of AI, with almost half (46%) of those users saying they engage daily**
>
> Source: OMG Proprietary Research

Users Are Motivated by GenAI's Utility and Its Entertainment Value!

While the most common motivation for using GenAI is for Q&A and information gathering (45%), about one-third of consumers are also motivated by the opportunity to do deeper research, and the same number (34%) of consumers are motivated by the pure entertainment that GenAI provides. While surprising at first, this type of overnight adoption of a new tool or technology is not possible without an element of entertainment. For many, the experience is not just efficient and productive, it's engaging.

> **While 45% of consumers cite Q&A and info gathering as a primary motivator for using GenAI, more than a third (34%) are motivated by pure entertainment**
>
> Source: OMG Proprietary Research

GenAI Adoption Continues to Be Driven by Younger Consumers

Our Future of Search thought leadership from late-2024 pointed out that younger consumers were driving growth in AI adoption, and that is still holding strong in 2025 (Figure 2).

Figure 2

CONSUMERS WHO USE SOME FORM OF AI

	Percentage
Gen Z	92%
Millennials	88%
Gen X	69%
Boomers	47%

Source: OMG Proprietary Research
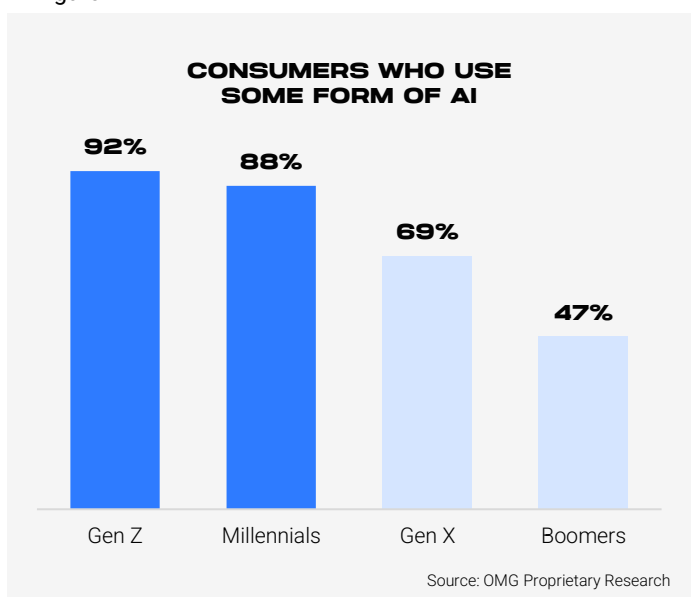
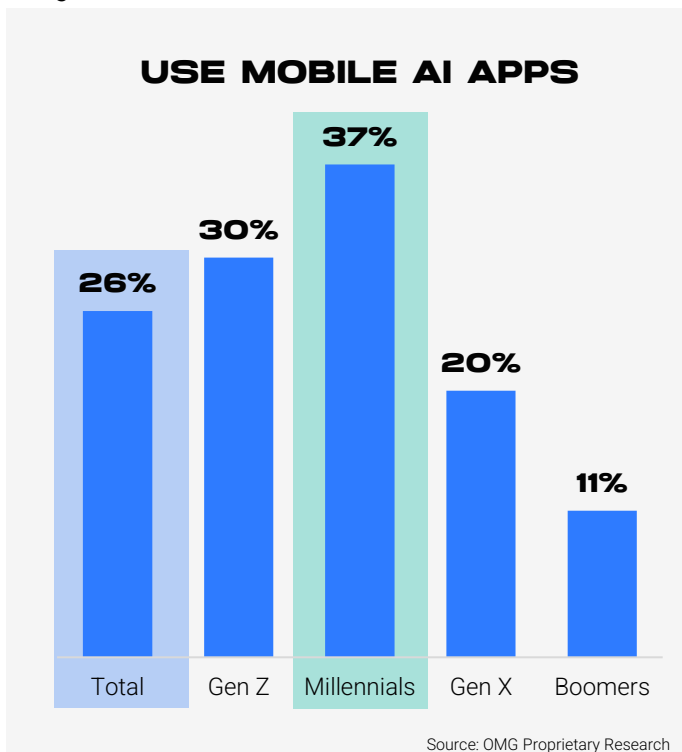Notably, as seen in our last report, it is Millennials—more than Gen Z—who continue to move the fastest in their embrace of GenAI. There are several potential reasons for this: Millennials are more likely to work in professional environments where GenAI tools can be useful for day-to-day tasks, and they are more likely to have discretionary income to experiment with premium tools than their younger Gen Z counterparts. To that point, reported use of premium AI subscriptions breaks down as follows: 45% Millennials, 37% Gen Z, 24% Gen X, and 14% Boomers.

Browsers remain the dominant gateway to GenAI interfaces, used by 70% of consumers. However, mobile apps are rapidly closing the gap: 37% of Millennials use mobile apps as a typical access point (54% told us they've downloaded one) versus 26% for the general population (Figure 3). As features like voice interaction expand, mobile is poised to become stickier and more central as a way to interface with AI.

Figure 3

USE MOBILE AI APPS

Total — 26%
Gen Z — 30%
Millennials — 37%
Gen X — 20%
Boomers — 11%
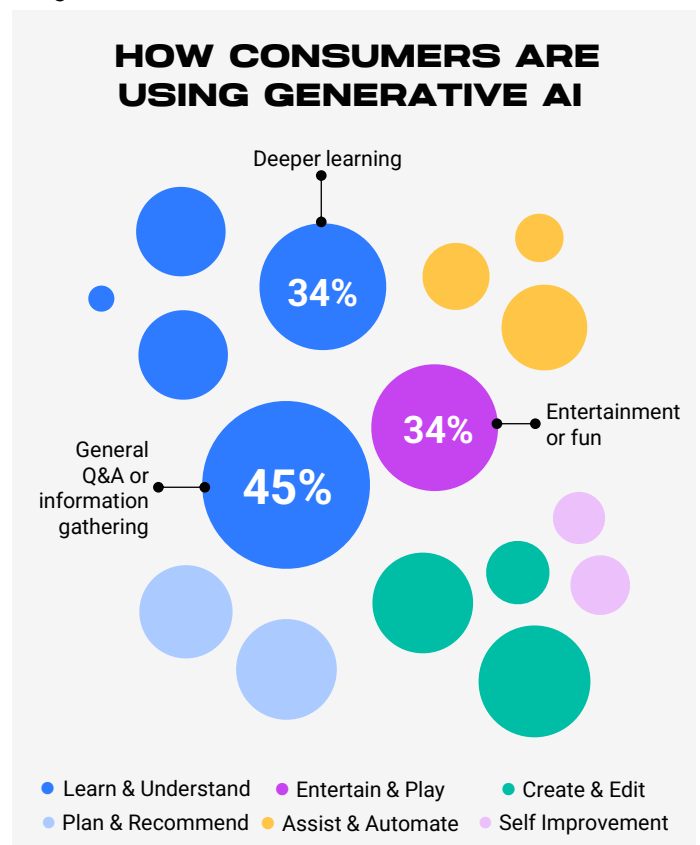
Source: OMG Proprietary Research

Together, these trends suggest GenAI is scaling faster than prior consumer technologies and becoming normalized in consumers' everyday routines—especially among younger cohorts. This trend is supported by third-party research.

GenAI Usage Is Profoundly Reshaping Search Behaviors

Most consumers (85%) agree that AI has already changed how people search. Unlike traditional search, **GenAI provides quick yet comprehensive summarized answers and supports deeper exploration**.

As noted earlier, 81% of users now report having up to five exchanges with a GenAI experience on a single topic during one search experience—exceeding typical exchange counts for traditional search. Furthermore, 62% of consumers say AI makes searching more fun, and 54% note they now dig into topics more than they used to (Figure 4).

Figure 4

HOW CONSUMERS ARE USING GENERATIVE AI

Deeper learning — 34%
General Q&A or information gathering — 45%
Entertainment or fun — 34%

- Learn & Understand
- Entertain & Play
- Create & Edit
- Plan & Recommend
- Assist & Automate
- Self Improvement

A whopping four-in-ten consumers (39%) say they have shifted most of their searches from traditional search engines to GenAI platforms, with Millennials again leading the shift (55%), followed by Gen Z (47%).

4-in-10 (39%) of consumers say they **have shifted** most of their **searches** from traditional search engines **to GenAI platforms**

Source: OMG Proprietary Research

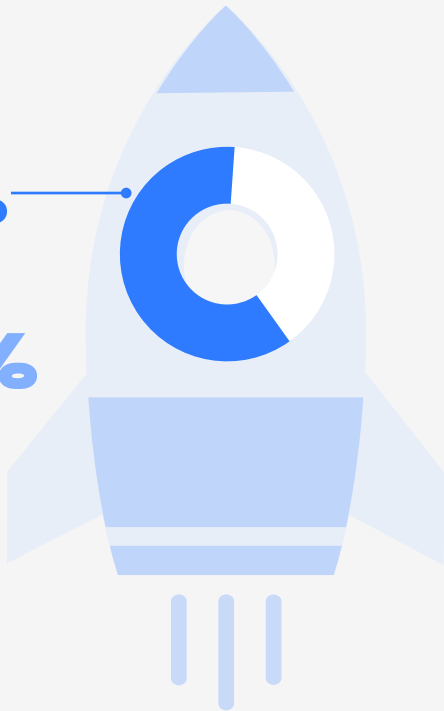## Trust in GenAI Is on the Rise, but Privacy Concerns Exist

As we observed in our [Future of Search](#) research, trust is a variable and a potential point of tension when adopting new modes of search. Today, traditional search engines remain the standard bearer for trust: 86% of consumers trust search engines overall. By comparison, 68% trust Google's AI Overviews and 61% trust GenAI platforms.

But even these numbers **represent a notable leap in trust in just one year**: trust in Google's AI Overviews jumped from 44% to 68% and trust in GenAI rose from 37% to 61%.

### TRUST IN GenAI HAS TAKEN OFF

2025:
61%

2024:
37%

Trust in GenAI overall rose from 37% in 2024 to 61% in 2025, indicating a rapid surge in trust. For Google's AI Overviews the numbers jumped from 44% to 68%.

Source: OMG Proprietary Research

We also found that while about 70% of consumers trust the accuracy and comprehensiveness of AI results, nearly half (49%) believe their data and chat history will not be used ethically.

Consumers remain cautious about sharing personal data with Generative AI. Still, usage and trust in content have both significantly increased since a year ago, suggesting that consumers weigh convenience, speed, and depth against safety and privacy concerns. This tension is more pronounced when considering topic sensitivity as defined by consumers.

THE "PRIVACY GAP"

Safety & Privacy

Accuracy, Speed, & Depth

Ask anything

📎 Attach   🌐 Search   📖 Study   🔊 Voice

49% of consumers believe their data and chat history/privacy will **not be used ethically**.

70% of consumers trust **accuracy** and **comprehensiveness** of AI results
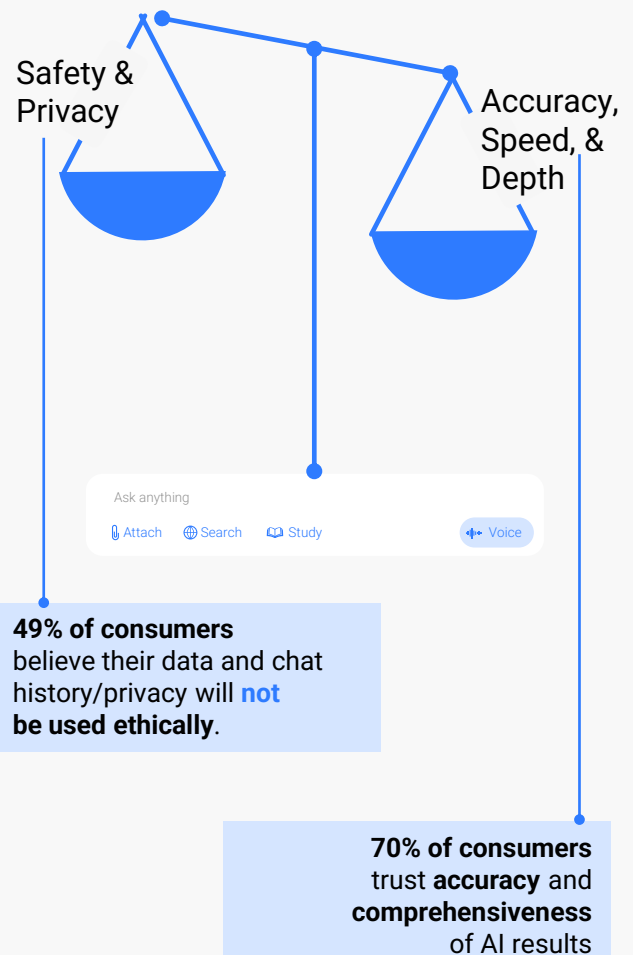
Source: OMG Proprietary Research

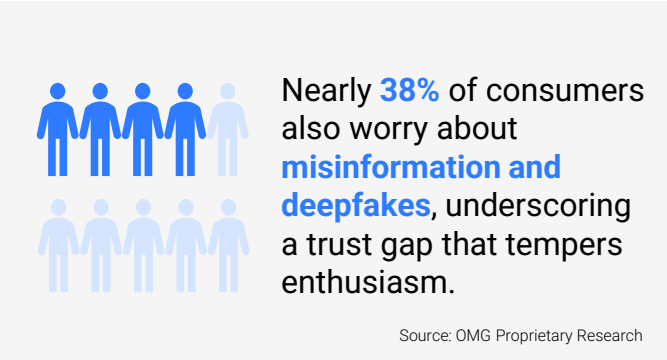Despite their concerns, almost 8-in-10 users (77%) have shared at least one piece of personal information with a GenAI chatbot, and many report sharing 4 to 5 separate pieces of personal information with chatbots today. On average, lower stakes data like demographics, shopping needs, or entertainment preferences are twice as likely to be shared (24%) than more sensitive information like specific finances and lab results (13%).

Again, younger consumers are more leaned in overall (see Figure 5), especially if this sharing leads to more personalized and relevant results.

Figure 5

HOW WILLING CONSUMERS ARE TO SHARE PERSONAL DATA WITH GenAI CHATBOTS

Gen Z — 42%
Millenials — 49%
Gen X — 26%
Boomers — 22%

Source: OMG Proprietary Research

TRUST CAN BE A BARRIER TO DEEPER AI USAGE

Concerns about data privacy or personal information	41%
Worries about accuracy or reliability of information	40%
Risk of misinformation or deepfakes	38%
Cybersecurity risks	32%
Ethical concerns	25%

Concerns around **data privacy (41%)** top the list of reasons people hesitate to use AI more often. These anxieties are most pronounced among older cohorts, while younger generations tend to be more willing to experiment and share personal details in exchange for richer experiences. While this trust gap exists, it is not a strong deterrent in adoption.

Source: OMG Proprietary Research

Verification behaviors underscore this cautious optimism. Approximately 48% of people say they regularly click on source links to double-check results. Interestingly though, just 38% of people report that they've encountered a hallucination, in spite of data suggesting actual hallucination rates can be quite high. While important for model benchmarking, hallucinations appear to be less of an impediment for users.

Nearly **38%** of consumers also worry about **misinformation and deepfakes**, underscoring a trust gap that tempers enthusiasm.

Source: OMG Proprietary Research

In short, consumers increasingly trust AI to deliver accurate, comprehensive results, but concerns about privacy and data ethics remain sticking points.
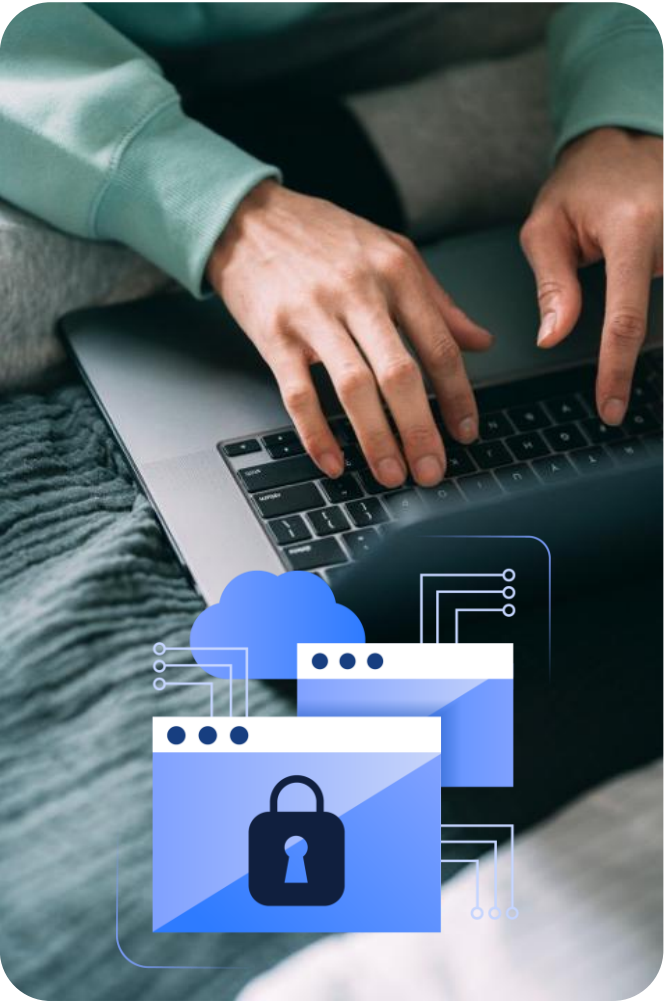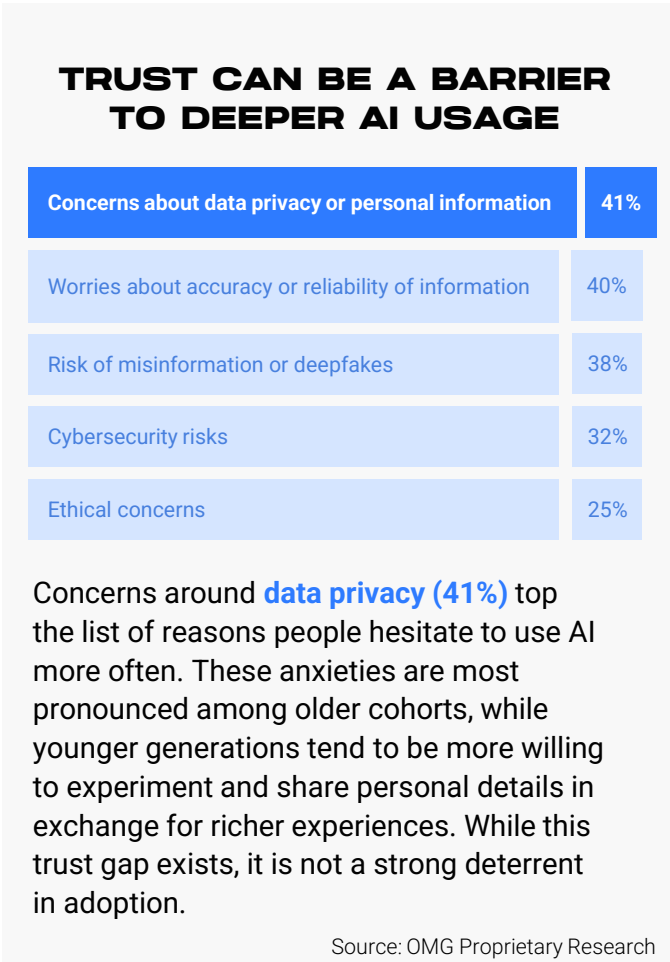
GenAI Has Influence Throughout the Full Purchase Lifecycle

As of today, consumers most often report turning to AI in the early phases of the shopping journey. Getting familiar with products (46%), discovering options (39%), or simply looking for inspiration (27%) are the main phases of the purchase journey in which GenAI is currently helping shoppers.

It is the last mile (purchasing) where GenAI lags behind other platform types today. When it comes to recommendations that trigger a purchase, consumers still cite traditional search (45%) and social media (40%) as having the most sway. However, 33% of consumers say GenAI helps them in the "Deciding" phase of the purchase journey and 17% of users now say they have purchased a product due to an AI recommendation (Figure 6).

The categories consumers search for via AI correspond to those where discovery and comparison matter most—areas with a high volume and variety of choices: travel (30%), personal care (27%), groceries (25%), household goods (23%), clothing (23%), and electronics (22%).

Overall, travel stands out as a unique case within GenAI Search. Unlike lower-stakes categories like groceries or personal care, travel is a high-involvement decision that typically requires extensive planning and coordination.
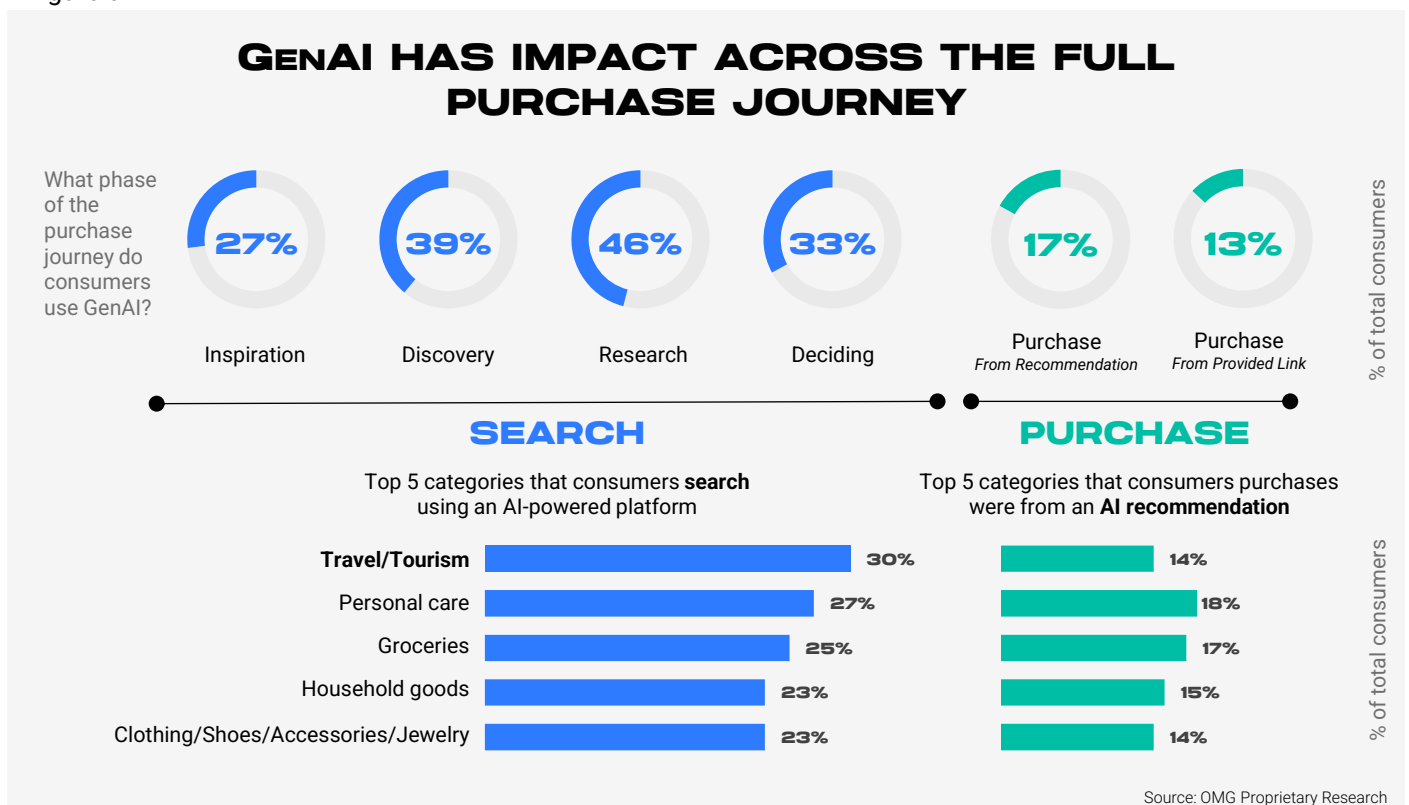
The fact that 30% of consumers already use AI for travel queries highlights how categories with heavy logistics—*and* where consumers are accustomed to working with human agents— are especially ripe for AI displacement.

In these category examples, Generative AI is not just a tool for quick inspiration, but a credible alternative to legacy service models, offering both efficiency and personalization at scale (watch this space as agentic capabilities evolve).

What consumers want—and expect—from all their GenAI search experiences is convenient, quick, comprehensive and safe interactions.

Figure 6

GenAI HAS IMPACT ACROSS THE FULL PURCHASE JOURNEY

What phase of the purchase journey do consumers use GenAI?

Inspiration	Discovery	Research	Deciding	Purchase From Recommendation	Purchase From Provided Link
27%	39%	46%	33%	17%	13%

% of total consumers

SEARCH

Top 5 categories that consumers **search** using an AI-powered platform

PURCHASE

Top 5 categories that consumers purchases were from an **AI recommendation**

	SEARCH	PURCHASE
Travel/Tourism	30%	14%
Personal care	27%	18%
Groceries	25%	17%
Household goods	23%	15%
Clothing/Shoes/Accessories/Jewelry	23%	14%

% of total consumers

Source: OMG Proprietary Research

Google's AI Overviews Serve as a Bridge for Many Consumers
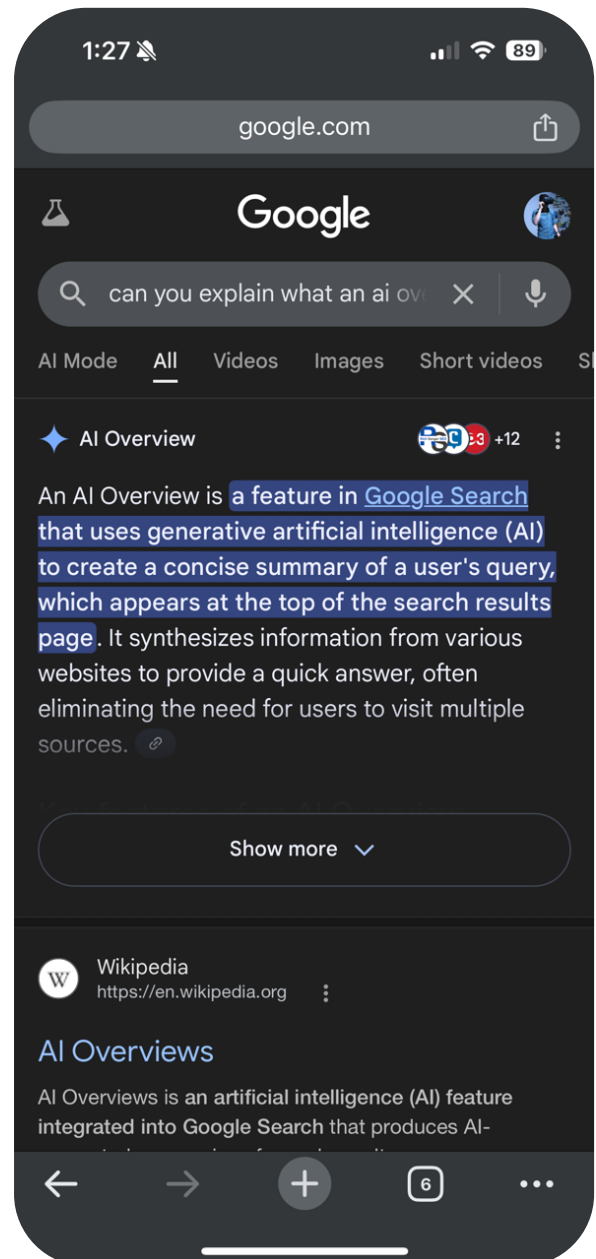
Of all the GenAI services we asked consumers about, **Google's AI Overviews** serve as a bridge between Traditional Search and AI chatbots, as **consumers are already adopting GenAI-powered results here as their first and last stop.**

Specifically, half of all consumers (50%) almost always look at the AI Overview summary. For 20% of consumers, they expect that AI Overviews alone–not the search results–will answer their question (see Figure 7 for additional details).
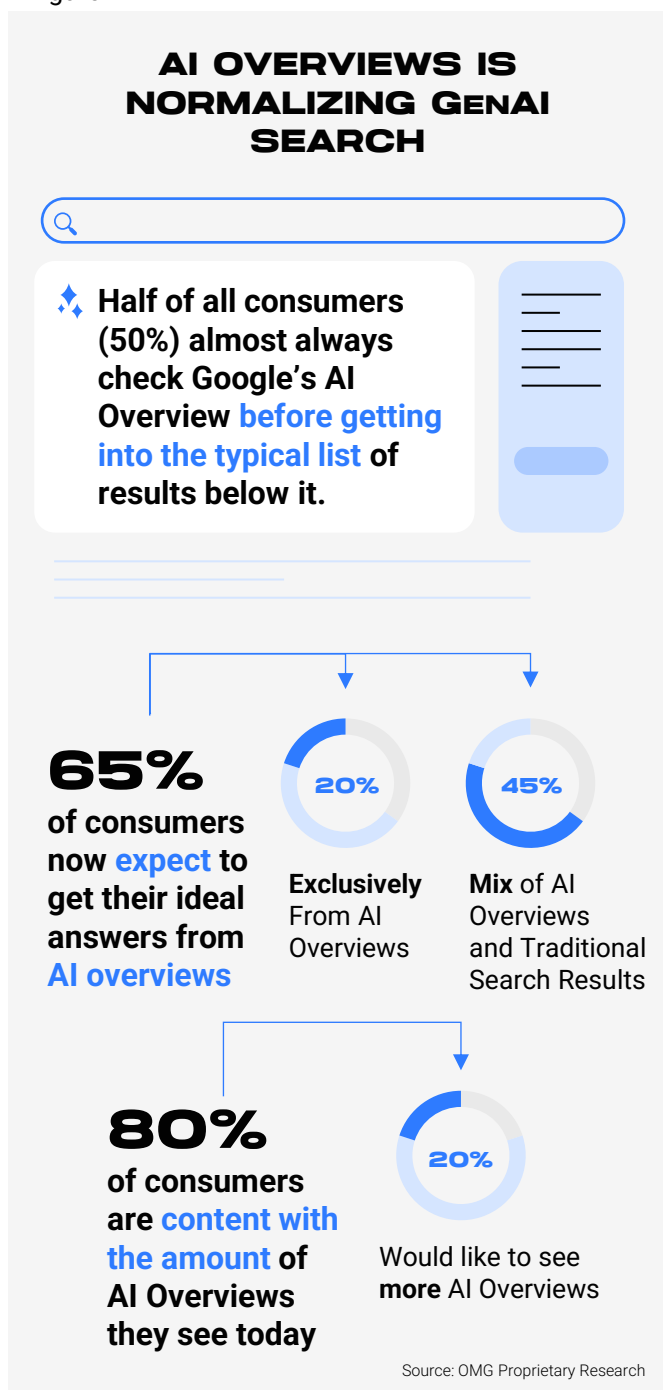
But notably, it is worth repeating two key facts that we outlined in last year's Future of Search piece: first, Google is *the* dominant search engine globally; and second, AI Overviews (see below) are generated and shown to consumers at Google's discretion, and they are increasing the number of times this happens. We'll cover Google and its outsized role in shaping the future of search in the GenAI era, more later in this report.

Figure 7

AI OVERVIEWS IS NORMALIZING GenAI SEARCH

✦ **Half of all consumers (50%) almost always check Google's AI Overview before getting into the typical list of results below it.**

65% of consumers now **expect** to get their ideal answers from **AI overviews**

20% **Exclusively** From AI Overviews

45% **Mix** of AI Overviews and Traditional Search Results

80% of consumers are **content with the amount** of AI Overviews they see today

20% Would like to see **more** AI Overviews

Source: OMG Proprietary Research

GenAI QUERIES AND SEARCH VOLUME GROW AS TECH FRONTRUNNERS EMERGE

Google and ChatGPT Are Battling for Supremacy as GenAI's Share of Search Continues to Grow Year Over Year

The GenAI landscape features plenty of players from established titans like Meta to newer entrants like Perplexity, some offerings ads, most not. Google—which now offers a mix of platform-initiated and user-initiated GenAI tools—is not just the biggest search engine; it is also the biggest search ads platform. And it is using that size to play multiple angles in the AI arms race—with its Gemini AI model powering all its efforts.

Google's current three-pronged approach to GenAI includes its Gemini AI app to battle with ChatGPT, its AI Overviews that are exposed at increasing rates to those who "google", and its latest search feature AI Mode.

Notably, AI Mode (available in 180 countries following its August 2025 update) bridges the gap between Platform-Prompted and User-Initiated by functioning as a mode that users can select *before or after* a query.

When it comes to advertising opportunities, the majority of these platforms are still not ad-supported. Only Perplexity, Bing Copilot, and Google's AI Overviews have ads and only at a limited scale. Google is currently in the midst of testing ads in its AI Mode. Implementing ads has been teased for other AI experiences, including xAI's Grok ((Figure 8).
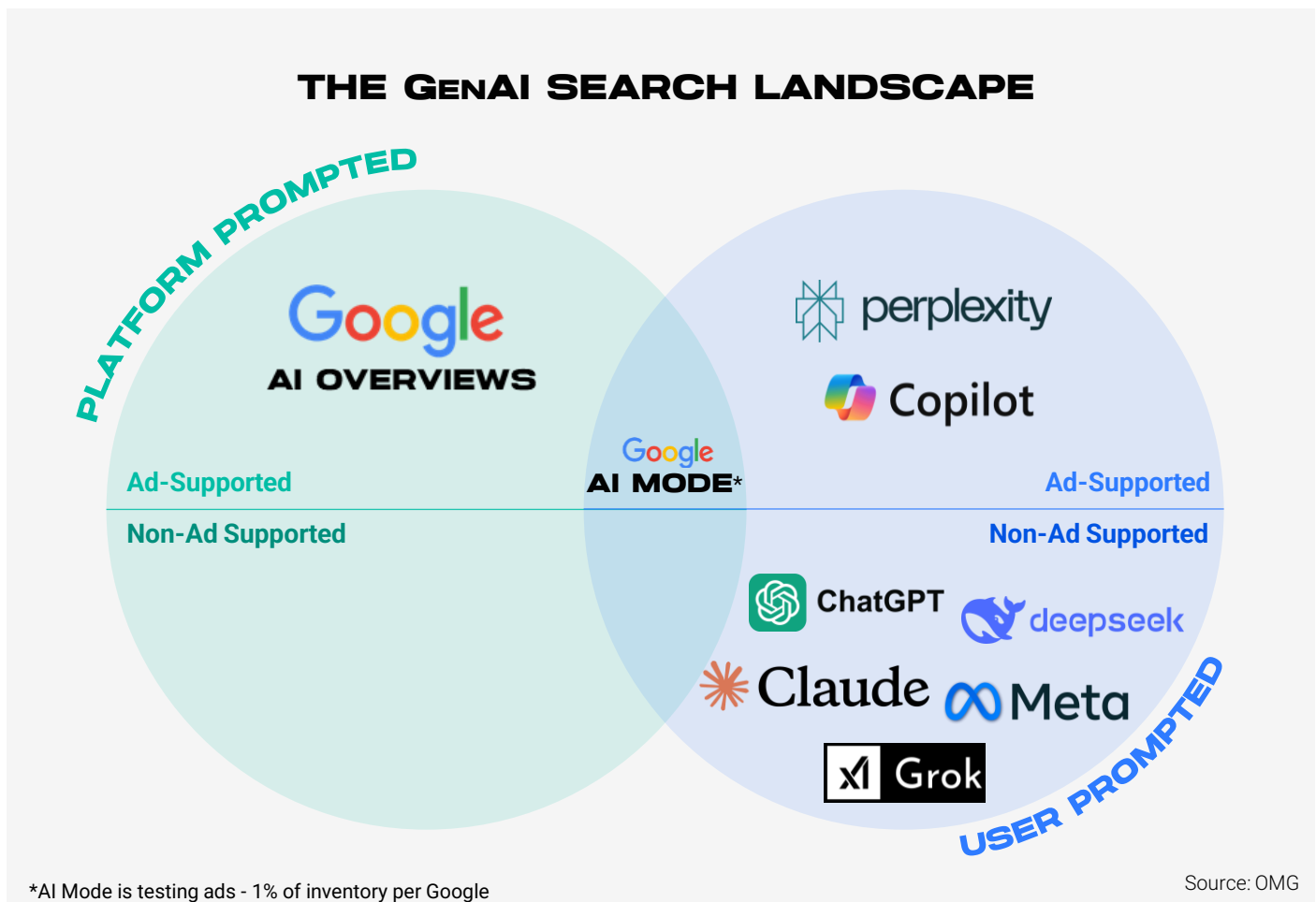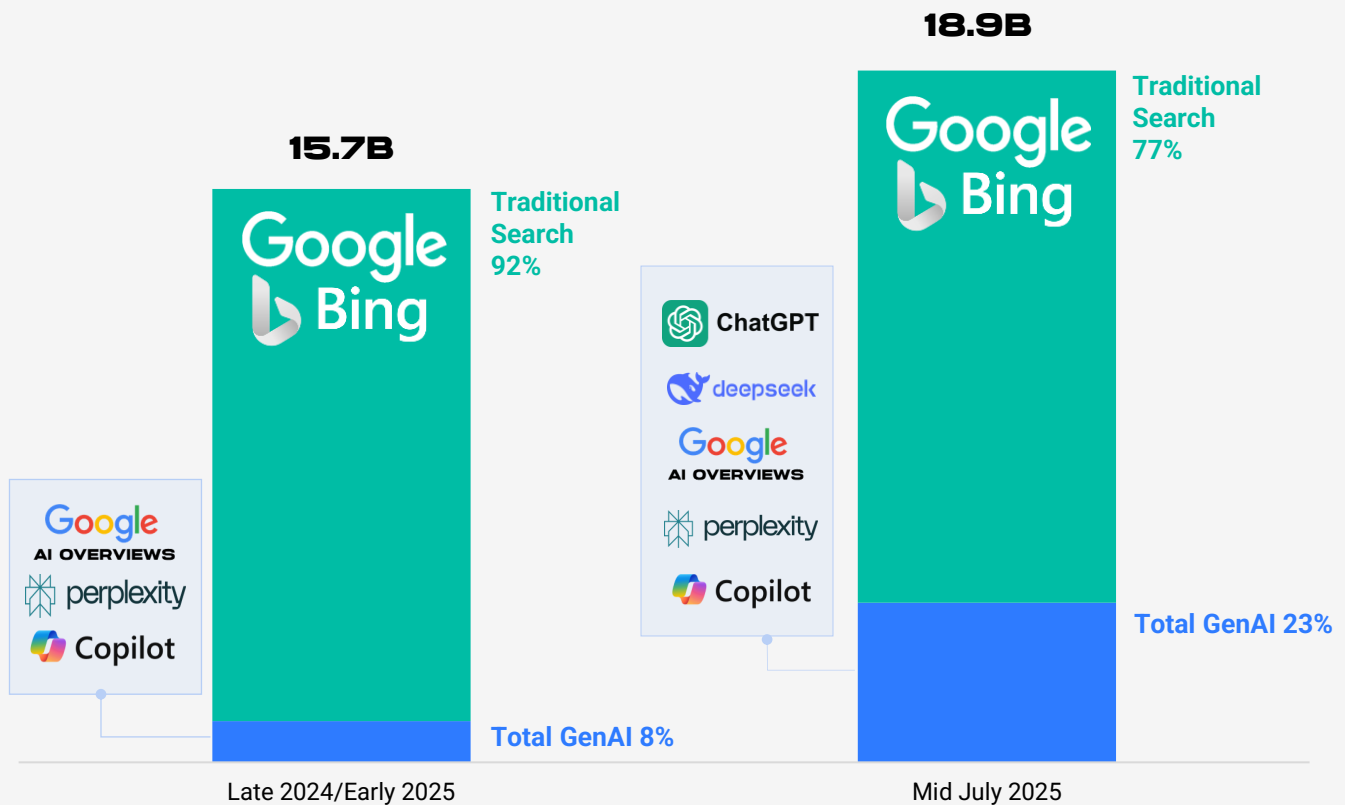
Figure 8

THE GenAI SEARCH LANDSCAPE

PLATFORM PROMPTED

Google AI OVERVIEWS

perplexity

Copilot

Google AI MODE*

Ad-Supported

Non-Ad Supported

ChatGPT   deepseek

Claude   Meta

xAI Grok

USER PROMPTED

*AI Mode is testing ads - 1% of inventory per Google

Source: OMG

Figure 9

DAILY GᴇɴAI QUERIES VS TRADITIONAL SEARCH QUERIES
(OMG ESTIMATED, GLOBAL)

15.7B

18.9B

Traditional Search 92%

Traditional Search 77%

Total GenAI 8%

Total GenAI 23%

Late 2024/Early 2025

Mid July 2025

Source: OMG Estimates & Public Statements
Claude, Grok, Llama, and Google Gemini and AI Mode Excluded

In our prior research, we developed an estimate of Traditional Search and GenAI Search query volumes to understand relative scale. Since then, Google has not released new query volume stats for Traditional Search; therefore, we kept those figures consistent (Figure 9).

Our new, updated estimates reveal that GenAI Search queries now take up 23% of the global daily search volumes, growing by nearly 200% since last year's research.

The explosive growth we report can be attributed to two factors. First, actual data on ChatGPT's substantial usage—2.5 billion queries per day—allowed for its inclusion. Second, Google nearly doubled their AI Overviews generation rate compared to last year's research.

All this GenAI usage has led to concrete changes to search query length and style. Google reported in May 2024 that searches with 5+ words grew 1.5x as fast as shorter queries.
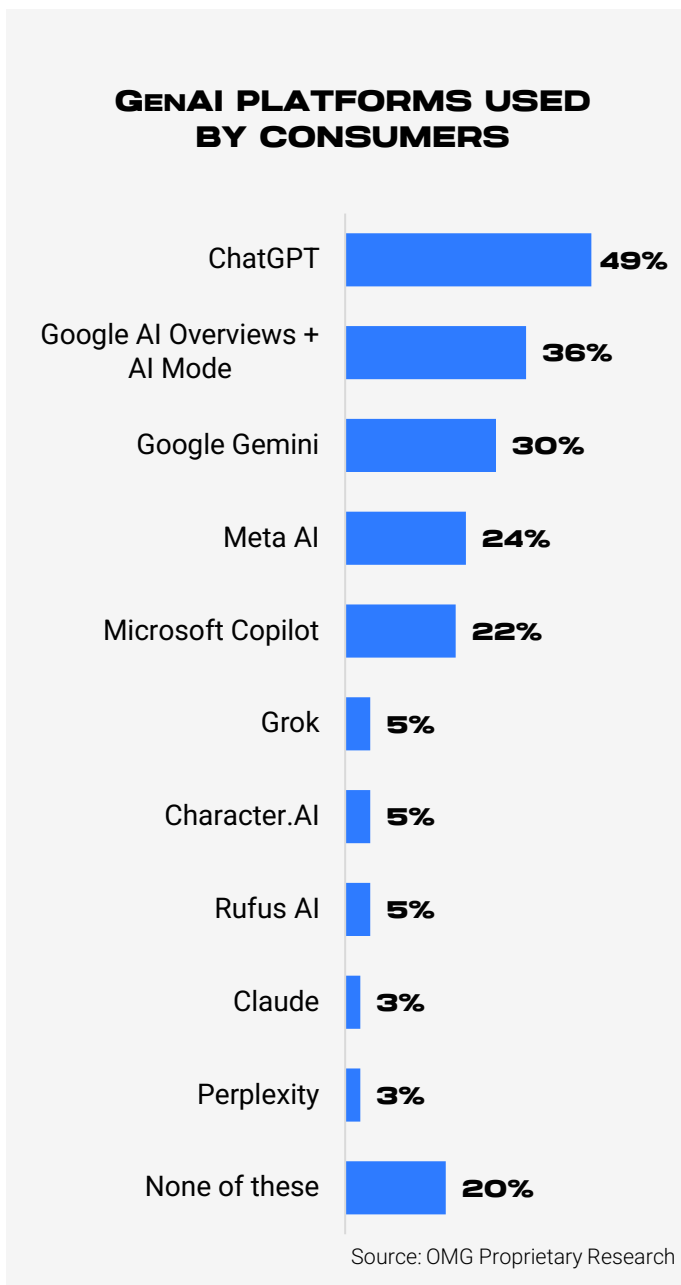
Since AI Overviews' launch, 8+ word queries have surged 700% and Google is surfacing AI answers for longer, more specific queries, echoing multi-year growth in 'for me/should I/near me' patterns. As AI models continue to evolve, enhance, and add new capabilities, the topics, intent type, and length will all evolve as well.

What we once called "the long tail"—longer queries, as described above—is now the fastest growing area in Search, reflecting the increasingly personalized nature of modern queries.

Reported Platform Usage and Deeper Query Analysis Further Highlight the Leaders

The data outlined in Figure 10, drawn from our consumer research, outlines which GenAI platforms respondents note they typically use. Clear leaders in self-reported usage include ChatGPT from OpenAI and Google's solutions, AI Overviews, AI Mode and Gemini app.
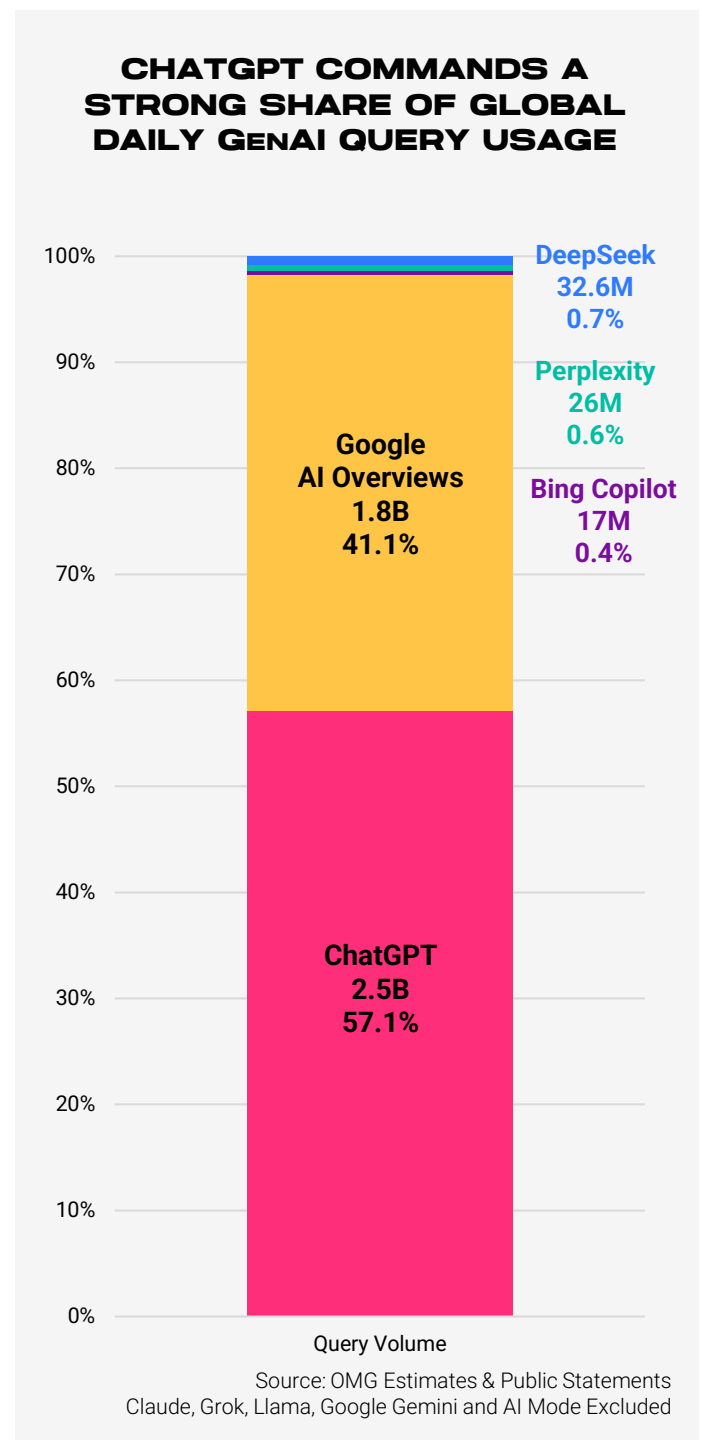
Figure 10

GenAI PLATFORMS USED BY CONSUMERS

Platform	%
ChatGPT	49%
Google AI Overviews + AI Mode	36%
Google Gemini	30%
Meta AI	24%
Microsoft Copilot	22%
Grok	5%
Character.AI	5%
Rufus AI	5%
Claude	3%
Perplexity	3%
None of these	20%

Source: OMG Proprietary Research

ChatGPT and Google also dominate when we assess GenAI query data more deeply. We updated our model from 2024 to estimate actual usage accounting for changes to Google's AI Overviews and recent reporting on ChatGPT's daily usage (Figure 11).

In total, we estimate there are nearly 4.4B GenAI queries per day, with ChatGPT taking the majority share (57%) of those queries. Google's AI Overviews make up 41%, with the remainder being split amongst Perplexity, Copilot, and DeepSeek. While we could not source daily queries volumes to Google's Gemini model via the app, they do have 35M daily active users globally. Similarly, Google has not disclosed AI Mode query volumes at the time of writing, but they do have 100M monthly active users in the US an India.

Figure 11

CHATGPT COMMANDS A STRONG SHARE OF GLOBAL DAILY GenAI QUERY USAGE

Platform	Volume	Share
DeepSeek	32.6M	0.7%
Perplexity	26M	0.6%
Bing Copilot	17M	0.4%
Google AI Overviews	1.8B	41.1%
ChatGPT	2.5B	57.1%

Query Volume

Source: OMG Estimates & Public Statements
Claude, Grok, Llama, Google Gemini and AI Mode Excluded

Multi-modal Prompting And Responses Are the GenAI Goalpost

As discussed earlier in the piece, consumers use GenAI for a variety of reasons and use cases, chief among them general information gathering, deeper research/discovery, and entertainment. Those variety of use cases means that whichever model can best handle multi-modal prompts (natural-language instruction or descriptions fed into an AI model to guide its generation or reasoning as well as an image, video, etc.) and generate multi-modal responses is well positioned to pull ahead in the AI arms race.

Language will affect usage too. AI models are dominated by English, but as more languages are supported, usage will increase, potentially both in the US and certainly globally. That said, these GenAI platforms also continue to improve their language translation accuracy and capabilities, enabling growth to already meaningful global usage stats. Recently, Google Ads removed its language setting for paid-search ads, underscoring that Gemini can understand user intent across languages.

But, as a quick reminder, few of the GenAI platforms have advertising enabled. Those that do have yet to offer it at scale.

Currently, as few as 1% of GenAI search queries are taking place in ad-supported environments.

As discussed earlier, as few as 1% of GenAI search queries are taking place in ad-supported environments. To give more context, Perplexity only serves ads on a percentage of its <1% queries share, and the same is true for Bing Copilot. And Google's AI Overviews ads remain rarer than unicorns, at least as of September 2025. As we noted in The Future of Search report, we do believe it's only a matter of time before advertising ramps in those platforms that do offer it, and it will come to those that do not. As this unfolds, we will cover it in more depth in future pieces.
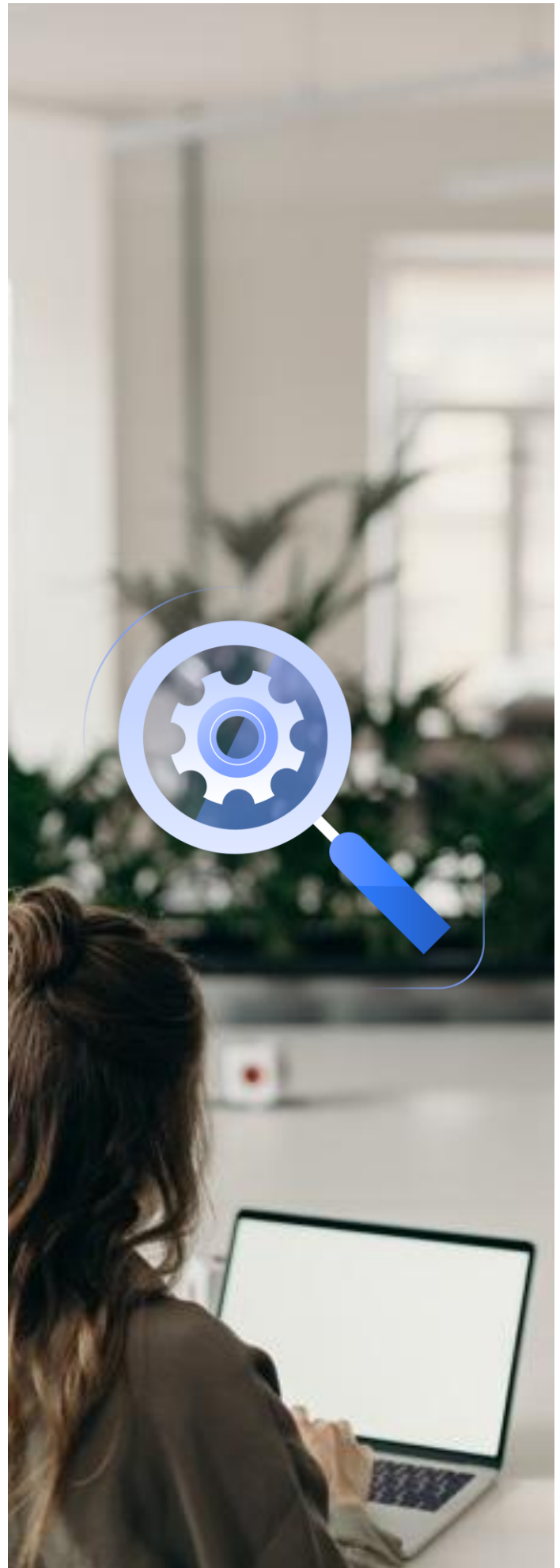
Is GenAI Killing the Open Web?

The rise of GenAI is not only disrupting consumer behavior. It is disrupting the fundamental economic model of the open web. Traditionally, search engines drove users to publishers' sites, where traffic was monetized through ads, and publishers paid for prominent placement in those search engines. However, GenAI-powered search—characterized by longer, personalized, and summarized interactions—is resulting in "zero-click" searches, where users get answers directly from within the results page, cutting out clicks to publishers entirely. This shift is already impacting information-driven websites; US news sites, for example, have experienced significant drops in visitors, and overall web traffic fell by about 15% year-over-year as of June 2025 according to an analysis by Similarweb.

Scenario Planning for a Zero-Click World

The open web must now adapt to a reality where users may rarely leave AI summaries or AI-infused SERPs (Search Engine Results Pages), threatening established monetization models. Legal actions against companies like Perplexity and OpenAI may eventually clarify copyright and fair use boundaries, but such cases are slow-moving and unlikely to provide timely relief. As a result, several alternative models are being tested:

1. **AI Platforms Pay for Access:**
   GenAI platforms could be required to pay for crawling and using publishers' content, especially for the latest information. Some infrastructure providers, like Cloudflare, are already blocking AI crawlers unless they pay publishers. However, this approach is not without controversy and is contested by some AI companies.

2. **Revenue Redistribution:**
   Another solution involves sharing ad revenue generated from AI answers with the original content creators, proportional to their contribution. For example, if 85% of an AI response is sourced from a publisher, that publisher receives a corresponding share of ad revenue. This model, notably favored by Perplexity, faces challenges of bias, as AI models may prefer certain sources like Reddit for their "human" responses.

3. **Consumer Choice for Content Access:**
   Google's Offerwall tool allows users to choose how to access paywalled content—viewing ads, making micropayments, or completing surveys. Early trials show a 9% revenue increase for publishers, though it's unclear how AI traffic is managed. This model empowers consumers and gives publishers more control but is not a complete solution and remains new.

It is not impossible to imagine a longer-term future with a hodgepodge of solutions, or something truly disruptive to emerge as personal agentic assistants move from "experimental" to "mass" and true zero-click becomes a reality for not just news and information publishers but for anyone with a website.

In the immediate term, when it comes to traditional publishers and advertising, display in particular, it's critical for brands to be mindful of this phenomenon and its impacts to web-based advertising, particularly with news and information-based publishers.

Google's Goal Is More Queries, Not More Clicks

With this as a backdrop, we once again turn back to Google – the biggest player, who, as we noted, is pursuing many angles simultaneously as it evolves its massive search business through the internet's GenAI transformation. As a result of Google's AI Overviews appearing on the SERP [Google is seeing 10% more search queries.](#) This increase in Google usage is directly translating into profits. On their Q1 earnings statement, the 'Search and Other Ad Revenue' category grew by 10% when comparing Q1'2025 vs Q1'2024.

We speculate that as queries are becoming more specific, more detailed, and more personalized, Google is realizing it does not need to force advertising into every search query or prompt because consumers will naturally follow up with commercially-oriented queries when relevant.

At least in the here and now, as long as Google's overall queries grow and users stay in Google's ecosystem, Google can decide when to show an ad and make money from the typically higher conversion rate.

As of September 2025, Google is testing 1% of traffic with ads in AI Mode (see featured screenshots) leading us to believe that ad placements in the future will scale across Google's GenAI Search environments. Gemini also provides supplemental revenue through its $20 per month subscription service.

As this likely advertising pivot occurs, it is also likely that Google's AI search experiences will incorporate shopping options directly into their summaries—zero-click shopping. This could open the door to other key metrics being prioritized in Search (impressions and purchases).

> **While AI Overviews is ad-supported, and AI Mode has ads in testing, we expect Google to expand its advertising options in its AI environments, particularly commerce-focused ad formats.**
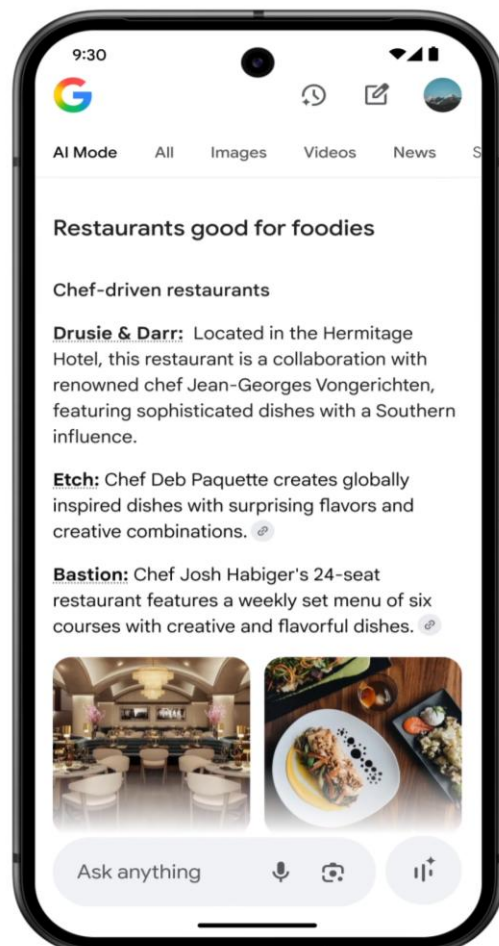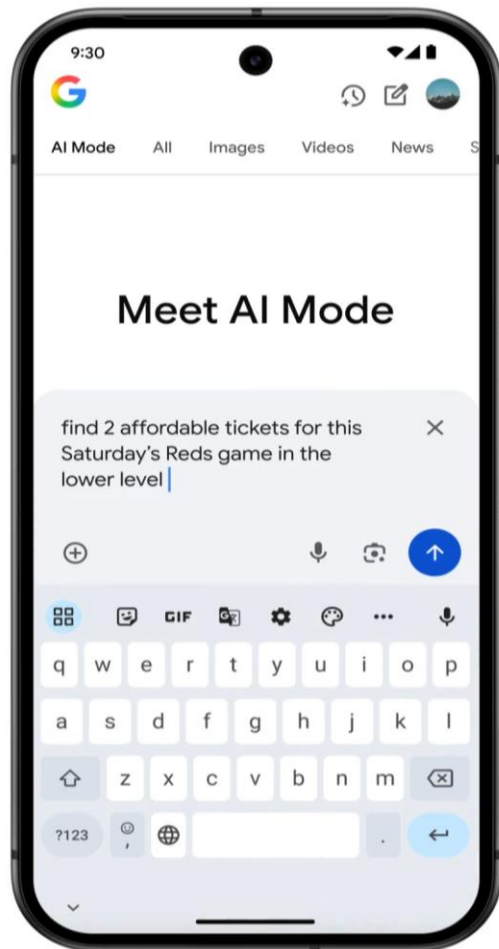
GENERATIVE ENGINE OPTIMIZATION (GEO):
YOUR NEXT "MUST HAVE" STRATEGIC FRAMEWORK FOR GenAI DISCOVERABILITY

GenAI Recommendations Represent a New Subset of Word-of-Mouth

Our proprietary consumer research revealed that 44% of consumers trust AI recommended products, services, or brands, and nearly 30% of them are also comfortable sharing basic demographic information to be used by AI platforms to provide personalized recommendations. Joining friends, family members, and influencers, AI will increasingly be a source consumers turn to for product recommendations. In effect, AI recommendations will become a new subset of word-of-mouth.

But how to react to this shift? We must reckon with the fact that clicks and direct attributable conversions will only go so far in a zero-click world. The new gold standard will become visibility, citations, and sentiment.

Unlike more codified terms such as share of voice (SoV) and share of market (SoM), brands must now enter less familiar territory: ensuring that their content is ready for interpretation by the LLMs. The premise is simple: marketing previously tried to improve a consumer's brand recall, which would improve the collective mind share (MS) of a brand.

However, now we have a new requirement: to market to AI to improve a brand's likelihood of being featured in an AI prompt response.

The challenge is that AI platforms do not make it easy to market to them to influence their answers. And even if successful, it is currently difficult to determine which marketing efforts led to a brand mention.

Additionally, AI prompts are hyper-personalized - consumers prompt in different ways, use different diction, provide different information, provide different levels of context, and have different goals – which leads to wildly different responses from AI platforms.

Tackling these challenges requires that brands leverage a new approach: Generative Engine Optimization (GEO).

GEO Explained

Generative Engine Optimization (GEO)* has emerged as a new discipline designed to improve brand visibility and representation across leading AI platforms. It focuses on content and technical optimizations that make sites more accessible to LLMs, helping AI models quickly find and extract the right information to surface back to users.

When GEO is done well, it leads to an increase in brand mentions, content citations and referral traffic. But most importantly, it empowers companies to tell their brand story on their terms, helping shape AI-generated narratives, being recognized as the source of truth and the authoritative voice that cuts through the digital noise that feeds the "data machine".

The growing adoption of AI platforms by no means diminishes the purpose and the value of a brand's website. If anything, it is undergoing an evolution to become a critical information vault that serves both humans and AI. Failing to provide content that addresses popular consumer questions will prompt AI to seek answers in external sources, where the brand and its products may not be represented as favorably.

GEO is becoming the primary means to ensure that when AI speaks, brands can still shape how they are perceived and represented. By adapting to the evolving search behaviors and delivering quality, AI-readable content – both in language and structure – brands, can cement their presence in AI-powered discovery.

> **GEO is becoming the primary means to ensure that when AI speaks, brands hold the key to influencing their presence and representation to consumers.**

* also sometimes referred by others as Answer Engine Optimization—AEO

GEO builds on the foundations of SEO but raises the stakes by aligning optimization with how AI perceives, processes, and prioritizes information. To frame this shift, we define the principles of GEO through the **"Four C's": Consumers, Content, Code, and Credibility.** Each represents a pillar that, when executed as a collective, will determine how brands appear — or disappear — in GenAI Search.

Consumers

GEO begins with consumers, and understanding their evolving search behaviors, prompting styles, and expectations. To serve users best, AI is programmed to ingest these consumer behaviors in the short term and later trained to provide more relevant and helpful responses over time based on these behaviors.

The Consumer portion of GEO focuses on influencing LLMs by identifying the most critical content across the consumer purchase journey (Awareness, Consideration, Decision, and Retention), identifying how consumers portray those stages in their AI prompts, and structuring digital content to mirror those prompt intents so that AI can easily ready and retrieve information. Internal linking and content pathways become not just navigation aids, but signals that help AI chart a clear, purposeful route for guiding consumers to the brand.

DESIGN AI LOGIC AROUND THE CONSUMER

**Human intent** captures relevancy to purchase journey stage

AI logic delivers sophistication and personalization

Our AI Journey Mapping audit helps to identify these pipelines and optimize accordingly so consumers can move through the pipeline seamlessly from start to finish and AI is primed and prepared to facilitate that progression.

Content

Content remains the cornerstone of optimization, but in GEO it carries new complexity. Traditional SEO aligns keywords with content so search engines can surface relevant options. GEO, however, goes a step further: it ensures content is structured for AI logic, where the model may bypass the "list of links" altogether and deliver a synthesized answer. For content to earn inclusion, it must:

- Stay tightly on-topic
- Communicate purpose with clarity
- Maintain efficient structure for token processing
- Extend the consumer journey forward, not dead-end it


EXTRACT DIGITAL CONTENT WITH INTENT

Critical content at purchase journey stages

Content portrayal in those **AI prompts**
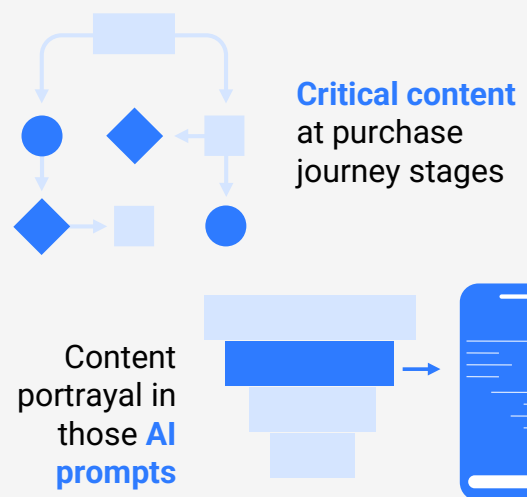
In GEO, we have found that only content that satisfies both human intent and AI's structural requirements becomes eligible for responses.

Code

Code is the foundation of GEO. AI, like people, "speaks" some languages fluently (HTML), others only partially, and some not at all (JavaScript). Clean, accessible, AI-friendly code ensures that content is actually tokenized, processed, and understood. This includes optimizing HTML structures, preloading otherwise hidden text, using schema markup, and avoiding reliance on formats AI cannot parse.

The balance is key: code must support AI comprehension without compromising consumer usability or traditional SEO performance.

CODE FOR AI WITH CARE

AI comprehension   Usability **+** SEO

Code
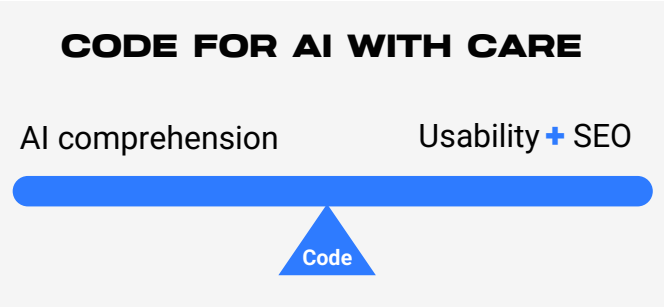
Credibility

Credibility is where GEO diverges most sharply from traditional SEO. AI systems weigh not just what information is available, but how trustworthy it is. They assess reputation across speed, accuracy, reliability, and authority. In GEO, credibility is not a siloed effort. To influence these signals, brands must embed themselves within broader ecosystems of trust — expert voices, reviews, research, PR, and industry publications.

This holistic alignment builds the data that AI looks at when deciding which sources deserve inclusion.

CREDIBILITY IS FOUNDATIONAL TO GEO

Ecosystem of Trust

◀ Experts
◀ Reviews
◀ Publications
◀ PR
◀ Research

How GEO Can Help Bring Light to LLM Black Boxes

Uncovering not just what AI does, but how it functions gives GEO the leverage to pry open the black box of LLMs. Each insight becomes an exploit — a way to strengthen connections between AI systems, brands, and consumers.

First Impressions, Tokens, and Context Windows

LLMs don't read text the way people do — they break it down into "tokens", or small units of meaning that get slotted into a finite "working memory" called the "context window." Once that "context window" is full, additional tokens are ignored. This makes first impressions critical not just for consumers, but for AI as well. Content buried too far down a page or written inefficiently risks being lost, while concise, high-value information presented early ensures AI can capture it before the window closes.
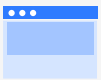
Prioritize **your page's initial viewport** for optimal AI capture

In our testing, optimizing content to surface a page's purpose and answers within the initial viewport raised AI Overview inclusion rates by more than 150%.

Accessibility and Readability

AI cannot perform manual actions to load hidden content, expand infinite scrolls, or bypass gated environments such as subscriber windows. If text never appears as tokens in the source code, it effectively does not exist to the model. Until LLMs evolve these capabilities, content locked behind JavaScript, overlays, or endless scroll remains invisible. GEO counters this by:

- Providing AI-readable HTML alternatives for JS-driven content

- Preloading hidden or gated text so it exists in the code

- Converting infinite scroll into paginated formats

Give AI a Hand: **Unhide**, **Expand**, and **Ungate** Content

Structured Data as Flashcards

Think of AI as a brand ambassador trained on your material — structured data acts like flashcards slipped into its (virtual) hand. Schema markup and well-tagged entities provide quick, authoritative reminders of critical facts the model can surface when weighing recommendations. And while relevance drives citations, speed is equally decisive.

Pages that combine structured data with fast performance become not just visible to AI, but preferable.

Schema-rich, **fast** pages feeds AI with the **most relevant** information

Neural Networks and Brand Influence

At its core, an LLM is a neural network predicting the next most likely "token" (or small unit of meaning). Every optimization you make — from efficient phrasing to clean markup — subtly shifts how your brand is represented inside that prediction engine.

GEO exploits the mechanics of LLMs by shaping what gets remembered, what gets cited, and how consistently your brand appears in the consumer journey.

Collective optimizations both big and small can **increase brand mentions**

Your Website Has Never Been More Important

Your owned and operated (O&O) assets, including your website, are a core source of information that feeds LLMs. It means that updates to your Content and Code can have a material impact on how these LLMs understand your brand, your products, and the value your deliver. AI models will continue to evolve and get smarter, but they will still rely on existing knowledge bases – of which your brand site is a critical component – to form their understanding of your offerings and provide answers to consumer questions of increased specificity.

Your existing assets can help LLMs to better field queries with specificity

LLMs need trusted information. Your site is one of the first places they look for it. And if they can't find it there, they'll turn to other sources – mitigating your opportunity to control your brand messaging.

GEO in Action: A Phased Approach

GEO is not just a concept by which to view a changing search and information landscape; it is a roadmap to deploy meaningful changes for clients. We have already started to perform analyses, conduct audits, and provide recommendations to clients using the principles of GEO and the 4 Cs. We follow a five-step strategic process:

1
Phase 1 – An AI User Journey
Discern how consumers search within a category or for a product using AI experiences

2
Phase 2 – A Brand AI Visibility Audit
Understand how a brand or a product is being positioned across various AI experiences

3
Phase 3 – An AI Content Audit
Understand how an AI chatbot is responding to common, top prompts

4
Phase 4 – Strategy Development
Build an AI response strategy and put it into action

5
Phase 5 – Optimize and Measure
Implement recommendations & measure the impact of changes

Given that GEO and AI experiences intersect with so many parts of the consumer journey, our product solution suite is being built in conjunction with Omnicom's PR Group (OPRG) and our retail media agency, Flywheel, leveraging a mix of in-house and trusted third party solutions.

GEO in Action: Success Stories

This network approach is bringing tangible value to clients:

- For a beauty and cosmetics brand, GEO practices increased product display page (PDP) Search Visibility by 33% using EEAT-optimized content (EEAT is a Google quality guideline).

- For a luxury goods and apparel brand, deploying a refreshed FAQs on product listing pages led to a visibility lift across AI models. We observed a win rate of 64% on targeted Google AI Overviews.

- For an audio electronics brand, building AI-forward content sparked a rapid increase in visibility across channels, generating thousands of impressions and hundreds of clicks for brand new content on highly competitive topics within three weeks from launch. The AI-forward content also boosted content citations for related prompts across leading AI platforms.

These early wins are just a starting point for GEO as a practice and for OMG's evolving capabilities to serve our clients in this world. Importantly, with both GEO practices and with advertising on AI models being both limited and nascent, there is no guarantee of placements within AI prompt responses. Until AI platforms allow for more direct advertising, we will continue to use these more indirect means of influence for the benefit of our brands.

GEO is a process, not an easy button. But when executed strategically and systematically, it delivers tangible value to brands.

STRATEGIC RECOMMENDATIONS

Adopt Generative Engine Optimization (GEO) and Rethink SEO/SEM

With 39% of all consumers (and 55% of Millennials) shifting most searches to GenAI and nearly 25% of all queries now happening in GenAI platforms, brands must optimize website content, structure, and code for AI consumption. Traditional SEO principles should be supplemented with GEO—ensuring content is AI-accessible and your brand is referenced in "zero-click" AI answers.

Expand Search Measurement Beyond Clicks

Legacy SEM captures only a fraction of what matters in the AI search landscape—as few as 1% of GenAI queries are ad-supported, and web traffic is down 15% YoY (30% for health sites). To remain relevant, brands should measure visibility, presence and sentiment in AI outputs and use tools like site log files for tracking AI-driven visits, not just relying on CTR or conversions.

Cultivate Trust, Credibility, and Data Ethics

Consumer trust is evolving—68% trust AI Overviews (up from 44% last year) but only 61% trust GenAI platforms overall. Younger audiences are more open to sharing data (49% of Millennials, 42% of Gen Z) for personalization, but caution remains. Brands must clearly communicate about privacy, focus on credible and authoritative content, and pursue PR and expert collaborations to increase AI-favored credibility.

Publisher Brands, Prep for a Zero-Click World

With GenAI queries growing by 200% in less than a year, and now making up nearly a quarter of searches, discovery happens directly in AI experiences—often without traditional clicks. Publisher brands must adapt content, possibly scenario plan for new revenue models, and explore alternative partnerships or paywall tools so value isn't lost in a "zero-click" future.

Experiment Thoughtfully with Paid Media in GenAI Search

Though we explored it in less depth in this piece, paid search still holds value even as most GenAI environments remain relatively ad-free (for now). Early adoption is key: 82% of consumers say they expect to see advertising from brands in Generative AI soon, but 38% of them also say they would be less likely to trust a Gen AI response if it was sponsored. Brands should monitor emerging ad formats, test frequently, prioritize relevance and user value, and pilot sponsorships where suitable.

These recommendations help brands align marketing and measurement with AI's rapid rise. Working with OMG to **embrace GEO**, **broaden metrics**, **build trust**, smartly **pilot paid tactics**, and prepare for **zero-click behaviors**, brands will be far more equipped to thrive in the changing search ecosystem in the short and longer term.

METHODOLOGY

CULTURAL INSIGHTS

To track cultural changes, we leverage Q, Omni's AI-powered cultural intelligence application, which analyzes over 350 million signals from 140 countries. These signals are mapped against our proprietary trend framework, The Elements of Culture, to reveal key patterns of change. For this piece, our Q system created a zeitgeist map (pictured in the body of the POV) by analyzing over 15,800 "signals" (articles, blog posts, patents, academic journals and more) within the U.S. over the past 2 years to determine what cultural trends are shaping the Generative AI landscape. Several elements of culture (EoCs) become salient when examining what's shaping the future of Generative AI from a cultural perspective.

CONSUMER RESEARCH

OMG Research conducted an online survey via our proprietary OMG Signal panel among 2,404 US adults aged 18–72 during July 2025 to get a current pulse of who's using AI, what they are using it for, and why. We explored the degree of trust consumers have in AI for their search needs, as well as their overall sentiments about AI. This research can help brands and marketers across categories as they navigate the GenAI disruption and aim to be seen/noticed in this evolving search landscape. For further questions or inquiries about customized research, contact: OMG Research Team - OMGResearchTeam@omnicommediagroup.com

FINAL NOTE

It's very clear the myriad ways GenAI is changing our world writ large and that of individual people: how they create, learn, work, socialize and build relationships, and so much more. For the purposes of focus and clarity, we kept the scope of this piece largely constrained to an assessment of the state of GenAI in the context of Search– specifically, consumer attitudes and behaviors, platform dynamics, and recommendations - to make a clear and compelling case for GEO and other recommendations related to GenAI and Search. We will follow up with future pieces on the broader story of AI and the many implications that story implies.
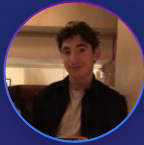
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