GRACKERAI MARKET INTELLIGENCE REPORT

AI Search 2025–2030: How GEO Wins the $379B Shift

Market Landscape, Platform Strategies & the GEO Playbook for B2B Growth

Published February 2026 · 23 Sources · 5 AI Platforms · Forecast to 2030 · VC & M&A; Landscape

Executive Summary

By 2030, AI search is projected to capture over 62% of total search volume, representing a $379 billion revenue opportunity. For B2B companies, this shift creates a critical visibility gap — traditional SEO is no longer sufficient as 40% of decision-makers use AI assistants for vendor research. Organizations must pivot to Generative Engine Optimization (GEO) and Answer Engine Optimization (AEO) to ensure they are cited in AI-generated answers.

$379B
projected AI search revenue by 2030 — 62%+ of total search volume

$225.8B
record VC invested in AI in 2025 — infrastructure hardening

40%
of B2B decision-makers now use AI assistants for vendor research

34.5%
average CTR reduction when AI features appear in search

1. AI Search Market Landscape 2025–2026

Platform	Market Share	B2B Strengths	Notable Data
ChatGPT (OpenAI)	~59–83%	Massive user base, commerce, brand equity	89% paid retention; 15–20% of Google query volume

Platform	Market Share	B2B Strengths	Notable Data
Google Gemini	~15–21.5%	Multimodal native, Android/Search default	21.5% web share by Jan 2026
Microsoft Copilot	~13%; 15M paid seats	M365 integration, enterprise security	80% of CIOs plan adoption; $30/user/mo
Perplexity AI	~5.5–8.2%	Citation-first answer engine, RAG focus	Peak 14.1% share; transparent sourcing
Claude (Anthropic)	~1–4% consumer	Agentic workflows, 100K+ context	Production-grade; enterprise API invisible

> ***Key Insight:*** *No single market share number is correct. Web traffic metrics overcount ChatGPT; enterprise seat metrics reveal Copilot's hidden strength. B2B marketers must segment by buyer persona to understand which platforms matter.*

2. Platform-by-Platform B2B Strategy

Platform	Enterprise Readiness	Distribution Moat	90-Day Actions
Microsoft Copilot	High — GCC-H/DoD	450M+ M365 seats	Optimize docs for semantic search
Google Gemini	Strong — CX agents	Android + Search + Workspace	JSON-LD; multimodal optimization
Perplexity	Growing — Zoom, SAP	Web-first; Sonar API	High fact density; authoritative sources
ChatGPT	Improving — shared projects	First-mover; API dominance	Test brand in work queries; commerce prep
Claude	High — production-grade	Enterprise partnerships	Deep technical whitepapers for long context

3. Technology Deep Dive: RAG

RAG is the mechanism by which AI platforms select which content to cite. The RAG market is projected to exceed $10B by 2030.

Technique	Performance Gains	Latency	How It Works
Hybrid Retrieval	Foundational recall	Low	Combines keyword (BM25) with vector search
Neural Re-ranking	+15–25 pp top-1 accuracy	+100–200ms	Re-scores top candidates for precision
Query Expansion (HyDE)	~+6% NDCG@10	~450ms	LLM generates hypothetical docs for matching

- **Production targets:** 70–90% top-1 correctness, 87–94% groundedness
- **Security-aware RAG** reduces hallucinations by 70–90% with document-level permissions
- **Content implication:** Structured, factually dense content passes RAG retrieval; unstructured prose fails

4. Multimodal & Voice Search

Model	Context Window	Modalities	Cost (Input/1M)	Strength
GPT-4o	128K	Text, Audio, Image	$5.00	Voice-optimized (~300ms)
Gemini 1.5 Pro	Up to 2M	Native Multimodal	N/A	Long-context understanding
Claude 3 Opus	200K	Text, Image	$15.00	Strong reasoning

Content requirements: JSON-LD schema for video/image objects · Transcripts (SRT/TTML) for all A/V · Descriptive alt text · Semantic chunking for RAG retrieval · Voice-speakable direct answers

Voice adoption: US voice assistant users projected to reach 168.2M by 2029 (from 139.8M in 2022).

5. Market Forecast to 2030

Scenario	AI Share by 2030	Revenue	Key Drivers
■ Bear	~40–45%	$220–250B	Regulatory friction, privacy concerns, slow cost reduction
■ Base	62.2%	$379B	Sustained adoption, 89% retention, hybrid monetization
■ Bull	>75%	$450B+	AI as default OS search, enterprise copilot ubiquity

> ***Strategic Implication:*** *Even in the bear case, AI search captures 40%+ by 2030. There is no scenario where GEO isn't essential. The question is how quickly you establish citation positions before competitors.*

6. VC & M&A; Landscape

Metric	2025 Value	YoY	Significance
Total AI VC Funding	$225.8B	~2×	Record year; AI is dominant investment theme
Mega-Round Share	79% of total	High	Rounds >$100M dominated
Infrastructure Spend	~$18B	~2×	Model training, data infra, serving systems

- **Perplexity AI:** $4B valuation — validates RAG-centered answer engines
- **Crusoe:** $1.38B Series E (~$10B) — AI data center infrastructure
- **Peec AI:** $21M Series A — specifically for AEO, validating the GEO/AEO category
- **M&A;:** Salesforce/Informatica (~$8B) for agent-ready data; HPE/Juniper (~$14B) for AI networking

7. The GEO/AEO Playbook

Strategy	What to Do	Implementation
Atomic Content	Modular, self-contained pages	Single concept per page for AI retrieval
Direct Answers	Answer in first 40–60 words	Inverted pyramid; critical info first
Question Headers	H2/H3 as natural questions	Map headings to buyer queries
High Fact Density	Stats every 150–200 words	Sourced data points for credibility
Schema Markup	FAQ, Article, HowTo, Product	Explicit structure for AI parsing
Authority Signals	Citation networks	Analyst, review, publication mentions
Human-in-the-Loop	AI draft + human review	Velocity + accuracy + quality

GEO KPI Framework

KPI	Definition	Target
AI Visibility Share	Brand reference rate in AI answers	+40–60% in Year 1
Citation Frequency	Explicit citations by LLMs	Significant uplift in 2–3 months
Groundedness Score	Accuracy of AI info about your brand	High via continuous auditing
AI-Referred Conversion	Conversion rate of AI traffic	3–5× over organic
Cross-Platform Presence	Visibility across 5+ AI platforms	Cited on 4+ platforms

8. 12-Month Implementation Roadmap

Phase	Window	Key Deliverables
Foundation	Days 0–90	Content audit · Schema markup · Pilot 20–30 atomic pages · Baseline KPIs · Select GEO platform
Scale	Days 91–180	50–100+ pages · Knowledge graph · Authority signals · pSEO portals · Continuous monitoring
Integration	Days 181–365	RAG integration · Content governance · Revenue attribution · Strategic partnerships · Multimodal optimization

About This Research

Synthesizes 23 sources including Pew Research, TTMS, Visual Capitalist, Microsoft, CB Insights, Menlo Ventures, EY, Mordor Intelligence, eMarketer, and GrackerAI platform analytics. GrackerAI is the pioneering AI-powered AEO/GEO platform for B2B SaaS companies.

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