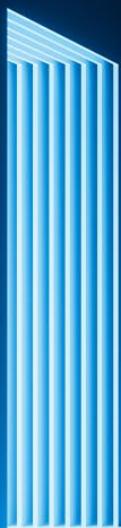


Growth, Marketing & Sales Practice

New front door to the internet: Winning in the age of AI search

Half of consumers use AI-powered search today, and it stands to impact \$750 billion in revenue by 2028—what is your strategy and activation plan for gen AI engine optimization?

This article is a collaborative effort by Elizabeth Silliman, Julien Boudet, and Kelsey Robinson, with Desirae Oppong and Nilay Shah, representing views from McKinsey's Growth, Marketing & Sales Practice.



Wondering when AI will fundamentally alter online research, discovery, and search behavior? You're too late. Hot on the heels of the ascent of social media as a means of researching and buying products, consumers are quickly defaulting to AI-powered search (through both AI-powered apps like ChatGPT, Gemini, Copilot, Perplexity, and Claude, and Google's AI Overview) to guide their choices, evaluate brands, and increasingly to discover new ones.

About 50 percent of Google searches already have AI summaries, a figure expected to rise to more than 75 percent by 2028, according to trend analysis. Half of consumers polled in a McKinsey survey now intentionally seek out AI-powered search engines, with a majority of users saying it's the top digital source they use to make buying decisions.¹ Use of AI-powered search spans all ages, including a majority of older generations (for example, baby boomers) already adopting it.² In fact, by 2028, \$750 billion in US revenue will funnel through AI-powered search.³

The result of this tectonic shift in the consumer landscape is that unprepared brands may experience a decline in traffic from the traditional search channels: anywhere from 20 to 50 percent.⁴ Further, remaining clicks from traditional search will shift in importance, and will now be more likely to come from informed consumers further along the purchase funnel, as decision-making moves to AI platforms before the click happens.

Winning brands will take action to improve visibility and positive sentiment on both AI summaries and AI platforms. Achieving that requires brands to rethink their approach to both digital content and organic search. They will need to consider modifying their content strategy and ultimately how they influence the broader set of sources that AI-powered search uses to generate answers to consumer questions. This shift carries risk, but it's also an opportunity to quickly and strategically adapt, driving competitive advantage in the process.

The AI-powered consumer decision journey

While more than 70 percent of AI-powered search users ask questions at the top of the funnel—that is, to learn about a category, brand, product, or service—the technology is also heavily used across the entire consumer decision journey (Exhibit 1).

¹ McKinsey's AI Discovery Survey was fielded among a representative US consumer panel during August 2025, n = 1,927.

² McKinsey's AI Discovery Survey, August 2025, n = 1,927.

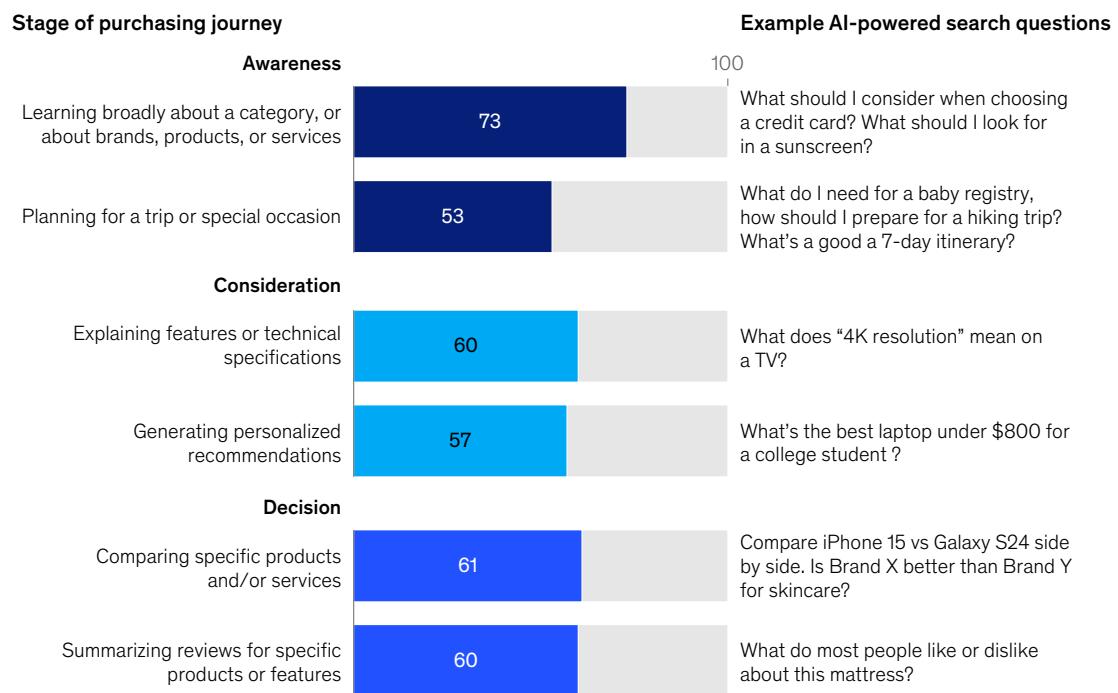
³ McKinsey projection.

⁴ McKinsey analysis.

Exhibit 1

Consumers already use AI-powered search extensively across the decision journey.

AI-powered search use cases by stage of purchasing journey,¹ % of respondents²



¹Question: What tasks have you used AI-powered search engines for?

²Users surveyed stated they use one of the following AI-powered search tools: ChatGPT, Claude, Copilot, Gemini, Google AI Overview, Perplexity.

Source: McKinsey's AI Discovery Survey, August 2025, n = 1,927

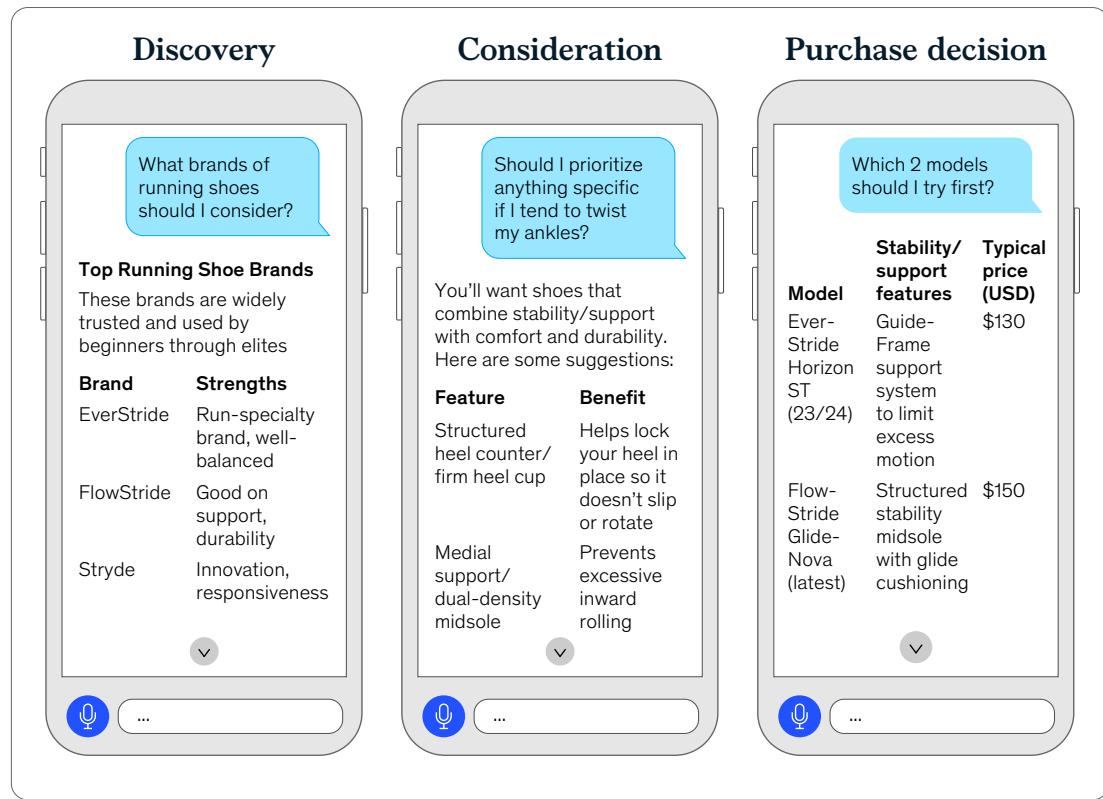
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Consider the example of a consumer looking for guidance about the best brands for cross-training shoes. With AI-powered search, they can easily understand what factors are important (such as price, functionality, and even style), what features different brands excel at, and which models have strong reviews. Consumers can even include their training goals or budget to fine-tune recommendations. (Exhibit 2).

Exhibit 2

Consumers are using AI-powered search for product discovery, feature comparison, recommendations, and so on.

AI-powered search purchase journey, illustrative



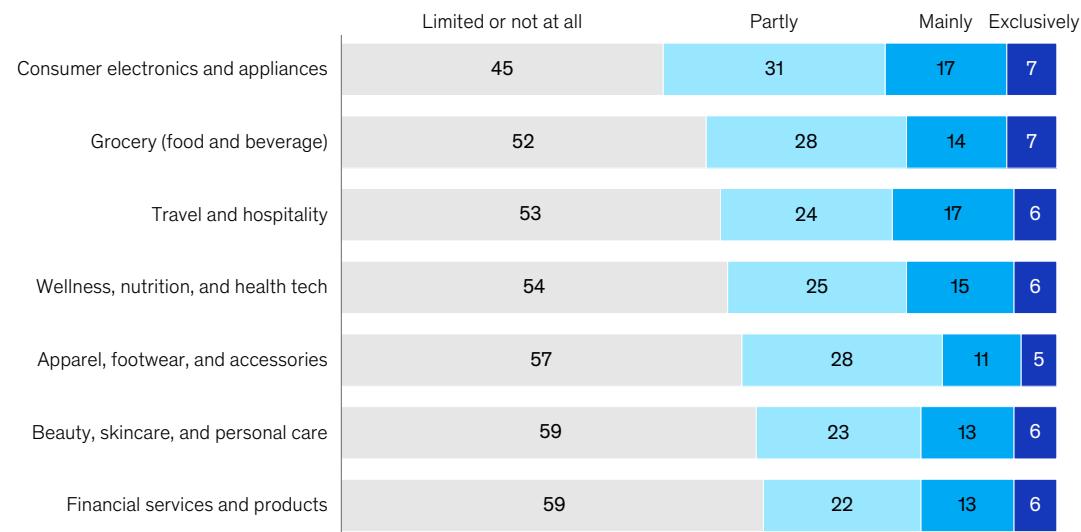
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In a traditional search, arriving at a conclusion often requires working through multiple review sites and product or category pages on brand sites, scanning online discussions, and then summarizing insights across several sources. It's no surprise that around 40 to 55 percent of consumers in top sectors (consumer electronics, grocery, travel, wellness, apparel, beauty, and financial services) are using AI-based search to make purchasing decisions (Exhibit 3).

Exhibit 3

Consumer electronics and appliances is the sector that sees the most use of AI-powered search to inform consumers' purchases.

Extent of AI-powered search engine use in purchasing journey,¹ % of respondents²



Note: Figures may not sum to 100%, because of rounding.

¹Question: Thinking about any purchases you've made in the past 3 months, to what extent did you use AI-powered search engines (eg, ChatGPT or Google's AI Overview) to learn about or make decisions in each of the following categories?

²Users surveyed stated they use one of the following AI-powered search tools: ChatGPT, Claude, Copilot, Gemini, Google AI Overview, Perplexity.

Source: McKinsey's AI Discovery Survey, August 2025, n = 1,927

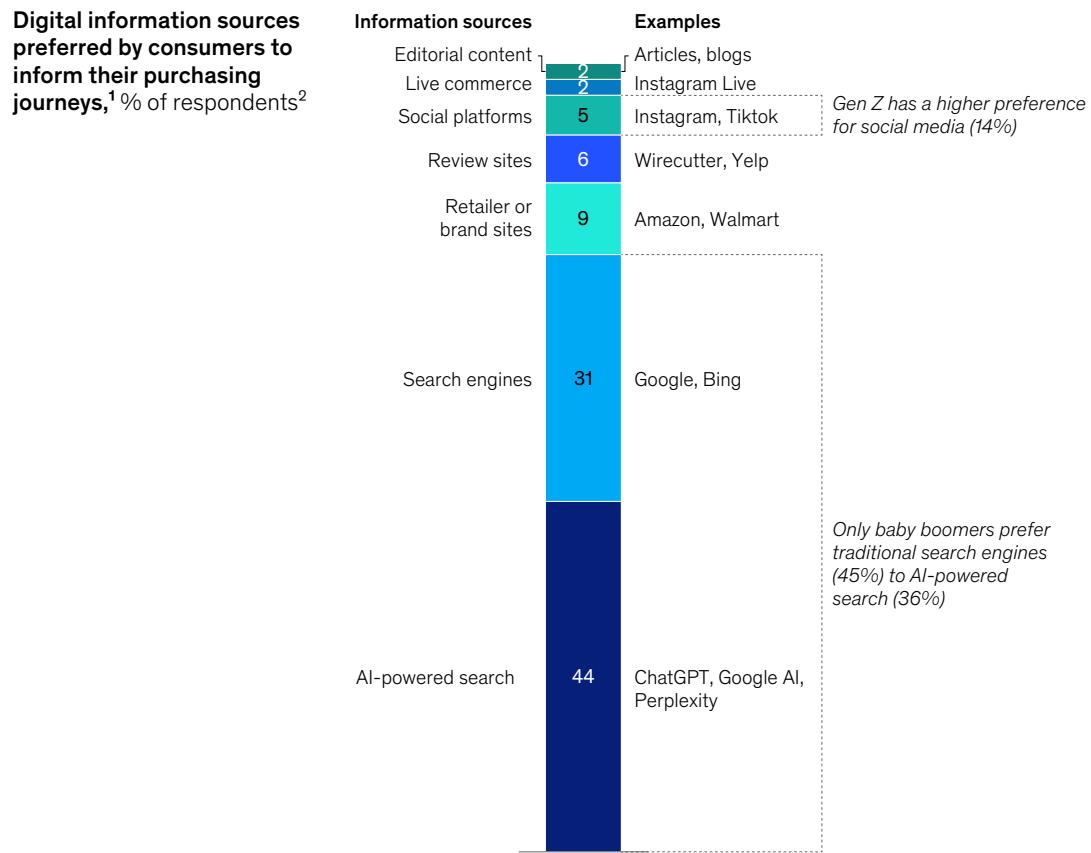
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The implications of this shift are clear. Already, 44 percent of AI-powered search users say it's their primary and preferred source of insight, topping traditional search (31 percent), retailer or brand websites (9 percent), and review sites (6 percent).⁵ That means that while search engine optimization (SEO) has been at the center of marketing strategy in recent years, gen AI engine optimization (GEO) will now need to be a key component of any holistic marketing and digital strategy going forward to maintain coverage across the touchpoints consumers use to make decisions (Exhibit 4).

⁵ McKinsey's AI Discovery Survey, August 2025, n = 1,927.

Exhibit 4

AI-powered search is already the most preferred source of information among users.



Note: Figures do not sum to 100%, because of rounding.

¹Question: Rank the sources in order of most to least likely to use when researching or making decisions related to a category, brand, product, or service.

²Users surveyed stated they use one of the following AI-powered search tools: ChatGPT, Claude, Copilot, Gemini, Google AI Overview, Perplexity.

Source: McKinsey's AI Discovery Survey, August 2025, n = 1,927

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Why your brand might not show up

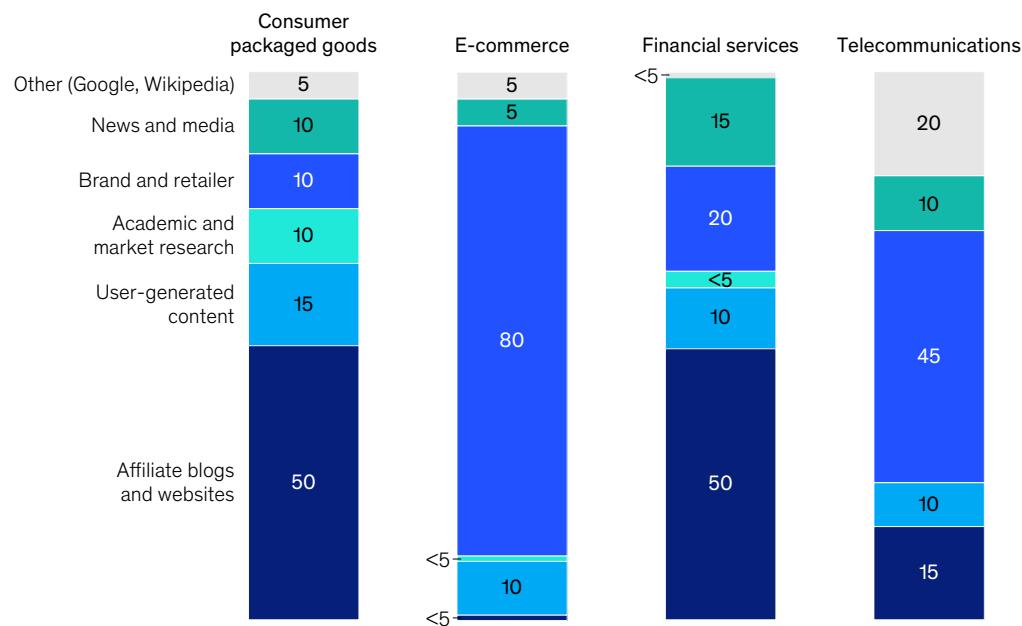
Even market leaders aren't guaranteed visibility in AI-powered search. While SEO focuses on own-site content, in many cases, a brand's own sites only comprise 5 to 10 percent of the sources that AI-search references; rather, AI-powered search pulls from a broad and diverse array of sources including affiliates and user-generated content.⁶ These sources vary by large language model (LLM), location, category, and question type, and these sources will most likely evolve over time as LLMs evolve. That makes meeting consumers in the places where they make decisions more difficult. For example, the distribution of sources used for AI-powered searches differs significantly across categories (Exhibit 5).

⁶Google AI Overview; McKinsey analysis.

Exhibit 5

Information sources used by AI-powered search are different from traditional search, and vary broadly depending topic and provider.

Sources for Google AI Overview responses in July 2025 (illustrative), approximate % of total¹



Note: Figures may not sum to 100%, because of rounding.

¹Total includes 600 consumer purchase questions in each industry.

Source: SEMRush; QuantumBlack, AI by McKinsey analysis

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To influence the myriad of sources utilized by AI-powered search and inform the marketing road map, brands need to understand what questions consumers are asking and which sources are shaping answers. And they need to continually keep pace as LLMs evolve. Few brands do that today. In major categories such as credit cards, hotels, electronics, and apparel, top brands can be absent from some answers across top AI-powered search platforms, including Google AI Overview.⁷ As such, some brands may have lower share on AI-powered search versus where we would expect them to be based on market share and performance on traditional search (Exhibit 6).

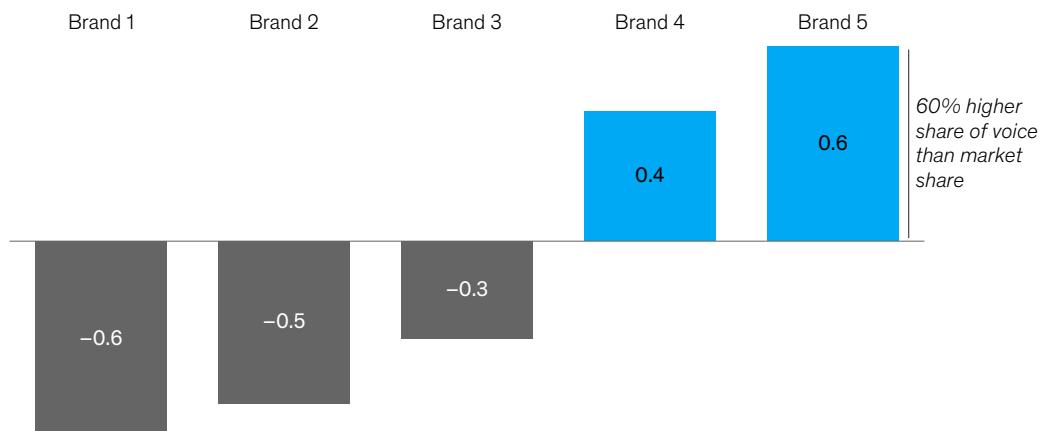
The bottom line? Traditional brand strength is no indicator a brand is ready to compete in the new world of AI-powered search. Visibility is not guaranteed.

⁷Google AI Overview; McKinsey analysis.

Exhibit 6

Retailers that don't optimize for AI-powered search will almost certainly lose share of voice in AI-powered search results.

Relative share of voice in AI-powered search results vs market share, calculated for 5 anonymized sportswear companies, normalized ratio (parity = 0)



Source: SEMRush; Quantum Black, AI by McKinsey; McKinsey analysis

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Investing in GEO: How to win

Given the rapid emergence of AI-powered search as a primary factor in the consumer decision journey, it's no surprise many companies need to catch up. The good news is that it's possible, but requires brands to rethink how they structure, produce, and amplify content.

Just 16 percent of brands today systematically track AI search performance.⁸ Four key moves can help the remainder get on board with winning in AI-powered search:

- **Undertake a robust diagnostic.** This will help explain current GEO performance and determine value at risk. In our experience, even the GEO performance of industry leaders may lag SEO by anywhere from 20 to 50 percent.⁹ By assessing visibility and sentiment across AI-based search platforms, brands can identify key sources driving results and benchmark current performance across relevant LLMs.
- **Adjust investments into and strategies for content.** This needs to address the breadth of content types that AI-powered search answers are built on, including owned content, third-party content, and communities. For example, in industries such as consumer-packaged goods and financial services,

⁸ McKinsey's CMO survey was fielded with Fortune 500 consumer brand CMOs in September 2025, n = ~30.

⁹ Google AI Overview; McKinsey analysis.

more than 65 percent of sources across AI-powered searches are publishers (magazines and microsites), user-generated content, and affiliate sites.¹⁰

- **Optimize content to surface in AI-based search engines.** Doing so involves strengthening credibility and relevance (including through providing new, unique information and topical coverage), improving its structure (including clarity through such as the use of clear headings and precise language), and ensuring both owned and third-party content is LLM-optimized.
- **Invest in GEO as a core capability.** Deciding where to invest requires establishing AI as a strategic priority and standing up a cross-functional team that spans marketing, SEO, and customer experience. The team will need to define GEO-specific KPIs to track progress continuously, while updating technology infrastructure to support LLM optimization.

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The best marketers have always sought to meet consumers where they are. Today, those consumers are increasingly using AI-powered search. They are rewriting the rules of visibility and marketing across the consumer decision journey. Brands have no choice but to adjust to this new reality.

The GEO landscape will continue to adapt as LLMs increase the depth and breadth of sources they pull from. Further, as LLMs test and evolve, they will begin to consider paid ad formats, eventually serving as AI agents that become consumers of GEO output to automatically make purchase decisions for human users. As a result, organizations will need to invest in GEO as a core capability to drive competitive advantage and define how consumers discover brands tomorrow.

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¹⁰ Google AI Overview; McKinsey analysis.