TQMU • The Quality Marketing Unit

Search isn't disappearing. Clicks are.

SEO vs GEO key metrics and outlook, 2026–2030. Updated November 2026. Research, analyst and reference sources only.

Metric	Latest figure (Nov 2026)	Source	End of 2027	End of 2028	2030
Google share of global search	**91.05% (Oct 2026); 89.94% (Sep 2026)**	Statcounter Global Stats	88–90%*	86–89%*	82–87%*
Google searches showing an AI summary	**~50%**	McKinsey & Company	~62%*	75%+	~85%*
Blended click rate per Google search (TQMU model)	**~11.5%**	Pew Research Center McKinsey & Company	~10.7%*	~9.8%*	~9.1%*
Consumers using AI-powered search	**~50%; 44% call it their primary source vs 31% for traditional search**	McKinsey & Company	58–65%*	65–75%*	75–85%*
US revenue flowing through AI-powered search	**Not published**	McKinsey & Company	n/p	$750B	n/p
Brands systematically tracking AI search performance	**16%**	McKinsey & Company	30–35%*	45–55%*	70–80%*
GEO market size (global)	**$0.39B (2025); ~$0.55B (2026)†**	MarketsandMarkets	~$0.78B†	~$1.09B†	~$2.17B†

* TQMU estimate: not published by the cited source; assumes a gradual adoption curve. † Calculated from the cited source's 41% CAGR (published endpoint: $4.25B by 2032). Unmarked projections are published by the source. n/p = not published.

Blended click rate = AI-summary share x 8% + remaining share x 15% (Pew click rates held constant, McKinsey summary share). Pew measured March 2025, when AI summaries appeared on roughly 1 in 5 searches, so this is illustrative. Sources are limited to research firms, analysts, academic and reference publishers; no SEO/GEO vendors.

Evidence snapshot

8% vs 15%	Visits clicking a traditional result link with vs. without a Google AI summary (900 US adults, Mar 2025)	Pew Research Center
1%	Visits that clicked a source cited inside the AI summary itself	Pew Research Center
26% vs 16%	Visits that ended the browsing session after a page with vs. without an AI summary	Pew Research Center
20–50%	Share of traditional search traffic McKinsey estimates is at risk as discovery moves into AI answers	McKinsey & Company
5–10%	Share of the sources AI answers cite that are a brand's own website	McKinsey & Company
up to +40%	Visibility lift from GEO methods in generative-engine answers (up to 37% on Perplexity)	KDD 2024 / arXiv
-25% (forecast)	Gartner's 2024 forecast for traditional search volume by 2026. A forecast, not a measured outcome	Gartner
$0.37B	Meticulous Research value for GEO software alone in 2026. Market-size estimates vary widely by scope	Meticulous Research