Rankability

DATA-DRIVEN FORECAST

Where SEO is going

The 2026 state of AI search — AI, AI agents, and the rise of Answer & Generative Engine Optimization.

48 months
Jun 2022 – May 2026

3,751 keywords
Google Keyword Planner

June 15, 2026
rankability.com

+260% AI search demand since 2022 (3.6×)	**−30%** SEO interest YoY — first sustained decline	**0 → named** AEO & GEO market in ~24 months	**80%+** of AI-answer queries are zero-click

EXECUTIVE SUMMARY

Demand is migrating from optimizing for search engines to optimizing for AI answers — and the transition is happening faster than the old discipline is shrinking.

Across the four-year keyword panel, general-AI search demand has roughly **3.6×'d since 2022** and is still accelerating (+85% year-over-year). Meanwhile interest in SEO itself **peaked in mid-2025 and has since contracted about 30%**. Answer Engine Optimization (AEO) and Generative Engine Optimization (GEO) exploded from essentially zero in 2023 to a clear, named market by 2025, then plateaued in early 2026 at still-small absolute volumes.

Read together, the trajectory is not "SEO is dying." It is **search being abstracted away by an AI answer layer**, and the optimization economy is reorganizing around influencing that layer. The winners will treat SEO, AEO and GEO as one converged practice — earning citations and mentions inside AI answers — rather than chasing blue links that fewer people click.

THE FIVE THINGS TO KNOW

01 **AI demand is the tide.** General AI search volume grew from ~91M (12 mo. to May 2023) to ~327M (12 mo. to May 2026). Everything else is a ripple on top of this.

02 **SEO interest has rolled over.** SEO-term demand topped out around mid-2025 and fell ~30% in the last year — the first sustained decline. Studies show organic clicks down 38–60% where AI answers appear.

03 **AEO and GEO are real but still tiny.** Both went from ~0 in 2023 to a named discipline by 2025, then plateaued. GEO carries ~2× the volume of AEO, even as practitioners standardize on "AEO."

04 **AI agents surged, then went volatile.** Agent demand ramped hard through 2024–25, peaked, and is now choppy — the signature of a category moving from hype to deployment.

05 **The clicked web is becoming the cited web.** With 80%+ of AI-answer queries ending in zero clicks, the goal shifts from ranking #1 to being the source the model quotes.

HOW TO READ THIS

What the data is

Built on a Google Keyword Planner export of **3,751 keywords across 48 months (June 2022 – May 2026)**, seeded around SEO, AI, AI agents, AEO and GEO. Keywords were grouped into themes, monthly volumes summed into category trend lines, and momentum computed as rolling 12-month totals, year-over-year change, and distance from peak.

Bucketed volumes

Planner reports rounded values — single-month spikes are partly an artifact, so trends matter more than any one month.

A leading indicator

Search interest measures attention and intent, not revenue or adoption directly.

One tool's view

This is Google demand; the direction of every major claim is cross-checked against industry research.

01 FINDING

The Great Divergence: AI up, SEO over the top

The single clearest pattern in four years of data is divergence. AI-topic demand climbs almost monotonically and steepens in 2025–26. SEO-topic demand rose alongside it into a mid-2025 peak — then turned down. These are no longer two parts of the same growth story.

THE DIVERGENCE — MONTHLY, JUN 2022 → MAY 2026

General-AI search demand (left axis) vs. SEO-term demand (right axis), monthly. Lightly smoothed to tame bucketing.

ROLLING 12-MONTH SEARCH VOLUME BY THEME

Theme (12 mo. to May)	2023	2024	2025	2026
AI (general)	91.1M	124.6M	176.6M	**326.9M**
SEO	27.0M	25.8M	47.7M	**33.4M**
AI agents	38.9K	145.7K	634.9K	**843.2K**
GEO	0	2.8K	15.6K	**59.8K**
AEO	0.4K	1.0K	7.4K	**27.3K**

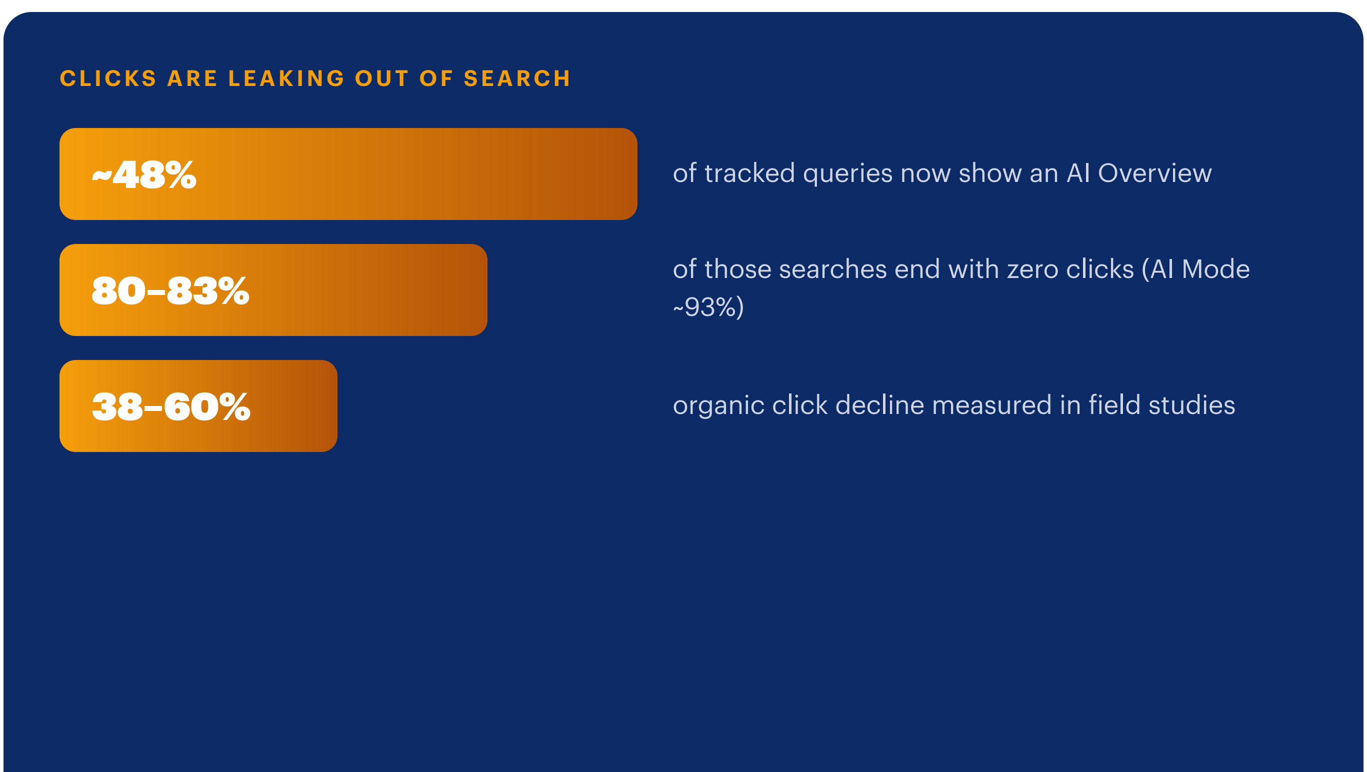
AI is ~10× the size of SEO and pulling away; AEO and GEO are real but roughly three orders of magnitude smaller. Momentum ≠ size — the fastest-growing categories are still the smallest.

02 FINDING

SEO interest has peaked

SEO is not collapsing, but the data shows its first sustained downturn. Rolling 12-month demand peaked in the year to May 2025 (~47.7M) and fell to ~33.4M by May 2026 — roughly **−30% year-over-year**, sloping down about 166K searches per month. Google's AI Overviews now appear on ~48% of tracked queries, and when they do, 80–83% of searches end without a click (AI Mode ~93%).

The deeper signal: **ranking and citation have decoupled.** The overlap between top-10 Google rankings and the sources cited in AI answers collapsed from ~75% in mid-2025 to 17–38% by early 2026. Winning the old game no longer guarantees winning the new one.



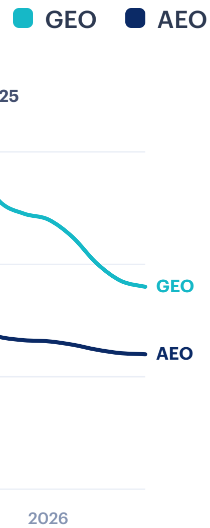
75% → 17–38% Overlap between top-10 Google rankings and AI-answer citations — collapsed in under a year.

03 FINDING

AEO and GEO: a discipline is born, then pauses

Both terms were statistical noise in 2023, became measurable in 2024, and scaled through 2025 — GEO running ahead of AEO. Then both peaked in late summer 2025 and plateaued: AEO sits ~17% below its September high, GEO ~45% below its August high. This is the shape of a term crossing from novelty into the working vocabulary of an industry.

AEO VS GEO EMERGENCE — MONTHLY SEARCH VOLUME



From statistical noise (2023) to a named discipline (2025) to a plateau (2026). Note the raw, still-small y-axis.

A USEFUL TENSION: VOLUME VS. USAGE

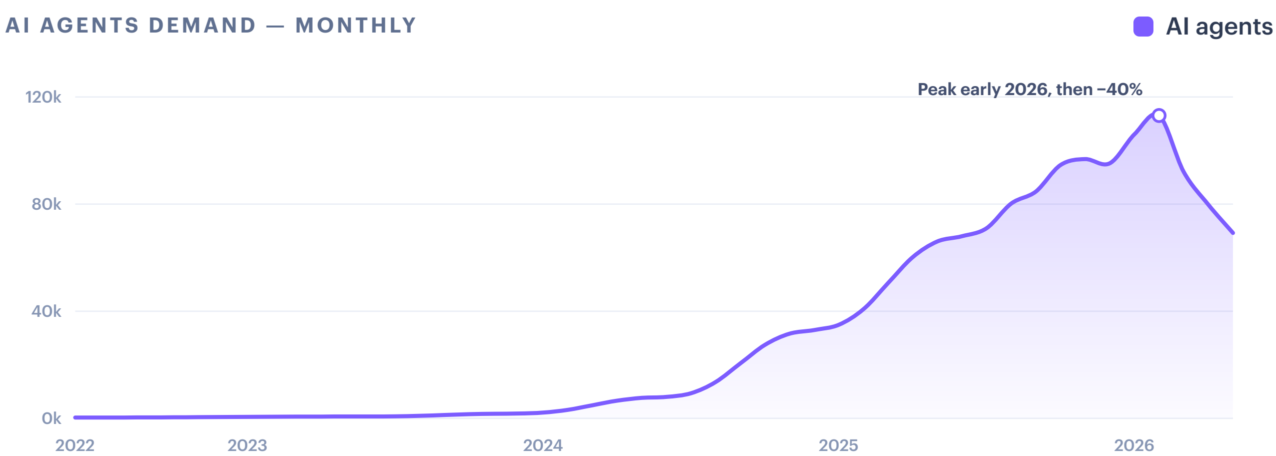
The data shows GEO with roughly **twice the search volume of AEO** — yet practitioners are converging on "AEO" as the standard label. The likeliest read: GEO caught the public imagination as the catchy name, while AEO is winning the boardroom because it maps cleanly to a measurable outcome — getting cited in the answer. Expect the field to collapse toward one or two dominant terms. Today's volumes are still tiny next to SEO: the plateau is a pause in the hype cycle, not the ceiling.

04 FINDING

AI agents: from hype spike to deployment

Agent-related demand grew ~22× from 2022–23 to 2025–26, ramped hardest through 2024 and early 2025, then turned volatile — peaking around early 2026 before pulling back ~40%. Choppy demand after a steep ramp is the fingerprint of a category graduating from speculation into deployment. Critically, **agents are becoming a consumer of search results**: the question shifts from "does my page rank?" to "does the agent choose, trust, and transact with my brand?"

AI AGENTS DEMAND — MONTHLY

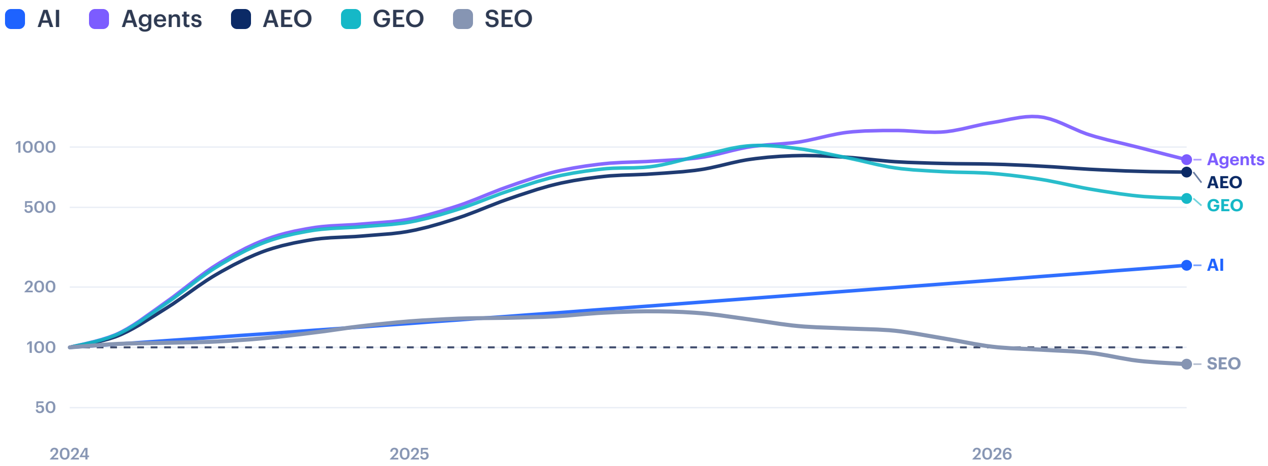


Explosive 2024–25 ramp, then a volatile plateau — the fingerprint of a category moving from hype into deployment.

Putting it together: relative momentum

Rebased to 100, slope shows momentum — and SEO is the only line trending below where it started. Momentum and size are inversely related: the fastest-growing things are still the smallest.

INDEXED MOMENTUM — REBASED TO 100 AT JUN 2024 (LOG SCALE)



Everything is above baseline except SEO, the only line trending below where it started.

WHERE THIS IS GOING · 2026–2028

Five bets worth making

1 **SEO doesn't die — it gets absorbed**

The decline in "SEO" interest is a rebranding event, not extinction. Crawlable, authoritative, well-structured content is what AI answer engines reward. The job title shifts toward "AI visibility," but the craft survives.

2 **The metric of record changes**

From rankings and traffic to citations and mentions. "Share of model" — how often your brand is cited across ChatGPT, Gemini, Perplexity, Copilot and Google AI — becomes the KPI, and a whole AI-visibility tracking category grows to fill the gap.

3 **AEO and GEO converge**

Four competing acronyms is unstable. Within ~18 months the field settles — most likely on "AEO" as the umbrella term — sold as a layer on top of SEO. A second wave of search interest follows as mid-market businesses start buying.

4 **Agents move from searching to acting**

Optimization splits again: brands optimize for agent decision-making — structured product data, machine-readable trust signals, API access. "Agent experience" (AX) becomes a discipline.

5 **The big risk: platform concentration**

The AI-answer economy depends on a handful of platforms whose citation logic is opaque and changes without notice. Diversifying across answer engines — and owning direct audience relationships — becomes the smart hedge.

SCENARIO HORIZON

Now – 2026

AI Overviews mainstream; organic CTR keeps falling; AEO/GEO in early-adopter phase.

Measure AI citations now; protect high-intent pages; educate clients early.

2026 – 2027

"AI visibility" becomes a budgeted line item; AEO/GEO terms consolidate; a second wave hits mid-market.

Productize an AEO/GEO offering; build a share-of-model stack; reposition the brand.

2027 – 2028

Agents transact at scale; optimizing for machine decisions (AX) emerges; multi-engine visibility is table stakes.

Invest in machine-readable data and direct audience ownership.

THE PLAYBOOK

So what should you do about it

01 **Reframe the offer.** Sell "AI search visibility" — SEO + AEO + GEO as one converged service.

02 **Change the scoreboard.** Track share-of-model / citations across ChatGPT, Gemini, Perplexity, Copilot and Google AI.

03 **Optimize for being quoted.** Answer-first content, clean structure, strong schema and entities, authoritative sources.

04 **Defend the high-intent core.** Transactional pages still convert clicks — protect and AI-optimize those first.

05 **Get ahead of agents.** Structure product and trust data for machine consumption now — cheap insurance.

06 **Own the audience you don't rent.** Email, communities and brand equity hedge against opaque platform rules.

THE OLD GAME	THE NEW GAME
Rank #1	**Be the cited answer**
Win the click	**Win the mention**
Track sessions & positions	**Track share-of-model**
Optimize for crawlers	**Optimize for answer engines + agents**

DATA & SOURCES

Primary data: Google Keyword Planner export, 3,751 keywords × 48 monthly data points (Jun 2022 – May 2026). The direction of every major claim was cross-checked against current industry research (accessed June 2026).

HubSpot — Answer Engine Optimization trends in 2026

SEO.com — Rising GEO trends for 2026

Marketing LTB — 98+ GEO statistics for 2026

Growth-Engines — 18 AEO & GEO terms to know (2026)

Search Engine Journal — AI Overviews cut organic clicks 38%

Ahrefs — AI Overviews reduce clicks (GSC analysis)

Mersel AI — Why is organic traffic declining in 2026?

commercetools — Agentic commerce stats 2026

eMarketer — Agentic shopping: Shoptalk 2026 takeaways

GrowthSpree — GEO vs LLMO vs AEO for B2B in 2026