



GEO, Agentic Commerce
and how **AI is Redefining**
Consumer-Brand Relationships

 **COMCAST**
LIFT LABS

Executive Summary 01

What is GEO/AEO? 02

Why Now? Timing & Market Shifts 03

The Market Map 04

Emerging Themes 05

Conclusion 09

EXECUTIVE SUMMARY

The emergence of AI-powered commerce is set to rival the transition from physical to digital commerce, with AI search and discovery representing a critical part of this shift. Search in particular is undergoing a fundamental transformation as AI answer engines powered by large language models (LLMs) challenge the dominance of traditional keyword queries. The nascent discipline of Generative Engine Optimization (GEO) has emerged as a response, helping companies understand and enhance how LLM-powered search engines like ChatGPT and Perplexity discover, interpret, cite, and recommend brands.

Startups like Bluefish and Profound, two members of the 2025 LIFT Labs Fall Accelerator cohort, are part of the emerging companies helping enterprises navigate this quickly shifting landscape, offering sophisticated platforms that track brand presence within AI search engines, analyze sentiment and citations sourced, and deliver actionable recommendations for optimizing digital visibility and sentiment within AI engines.

The implication of the current moment is twofold: brands must master both SEO and GEO to remain visible, and they must measure success differently. Traditional SEO focused on traffic *after the click*; GEO requires tracking visibility, share of answer, sentiment, and citations both *before the click* and at the moment AI search engines surface your brand.

AI has become the new brand influencer as well as an emerging front in the battle for consumer mindshare.

GEO allows smaller companies to compete on near equal footing with large brands that aren't optimized for LLMs.

Importantly, GEO also represents a critical strategy in combatting AI's disintermediation of brands and consumers. With new products like ChatGPT's Apps and Instant Checkout that boast retailer integrations with the likes of Walmart, Target and Shopify, AI is set to revolutionize not just digital marketing but also digital commerce, through AI-forward consumer shopping and purchasing experiences. In this future, certain categories of consumption are likely to fall either "above" or "below" an automation line, determining whether consumers either maintain personal, emotional relationships with brands or offload the decisioning and purchasing of goods and services to AI. Without GEO, brands are increasingly likely to cede control of their relationships with consumers as AI shapes and executes discovery, decisions, and transactions.

In this white paper we outline some of the emerging tactics for AI search engines like Google AI Overviews, ChatGPT, and Perplexity; make predictions about how this space is going to evolve; and provide recommendations on how enterprises can both capitalize on this unique moment and stay "above the automation line" in the coming AI-powered economy.

WHAT IS GEO/AEO?

Generative Engine Optimization (GEO), also called **Answer Engine Optimization (AEO)**, is the discipline of ensuring brands are named, cited, and recommended in AI-generated answers.

Where with traditional SEO brands competed for visibility in Google's "blue links," GEO is about influencing how large language models (LLMs) like ChatGPT, Gemini, Claude, Perplexity, Copilot, and Google AI Overviews retrieve and present your brand when a consumer asks a question.

// *The AI's perception of your brand is the battleground. The core message you 'own' inside the model is what gets repeated to customers."*

Josh Blyskal, Head of AI Research at LIFT Labs portfolio company, Profound.

GEO represents a shift from optimizing for search engines to optimizing for answer engines. Keyword rankings no longer matter as much as the percentage of AI responses that include your brand. SEO gets you indexed. GEO gets you included.

Together, they define digital visibility in the AI era.

WHY NOW?

Timing & Market Shifts

Three converging shifts make GEO urgent:



AI Is Rapidly Becoming The Default Frontend For Search

While the share of AI-driven searches is still relatively small today, it is growing at a rapid pace and all indicators suggest it will soon become the default way people search. Google has expanded AI Overviews to 200+ countries and territories and some projections even have ChatGPT surpassing Google in traffic by 2030. Already, [nearly 1 in 4 ChatGPT users prefer using the AI engine](#) rather than Google for search.



Traffic Is Moving Upstream

Publishers are reporting 15–25% annual declines in organic referrals as “zero-click” AI results displace traditional clicks.* By 2027, most “visitors” to brand websites may be AI agents, not humans. The future of commerce will increase between agents, where personal shopper AIs discover, recommend, and even transact on behalf of consumers.



AI Engines Are Opaque

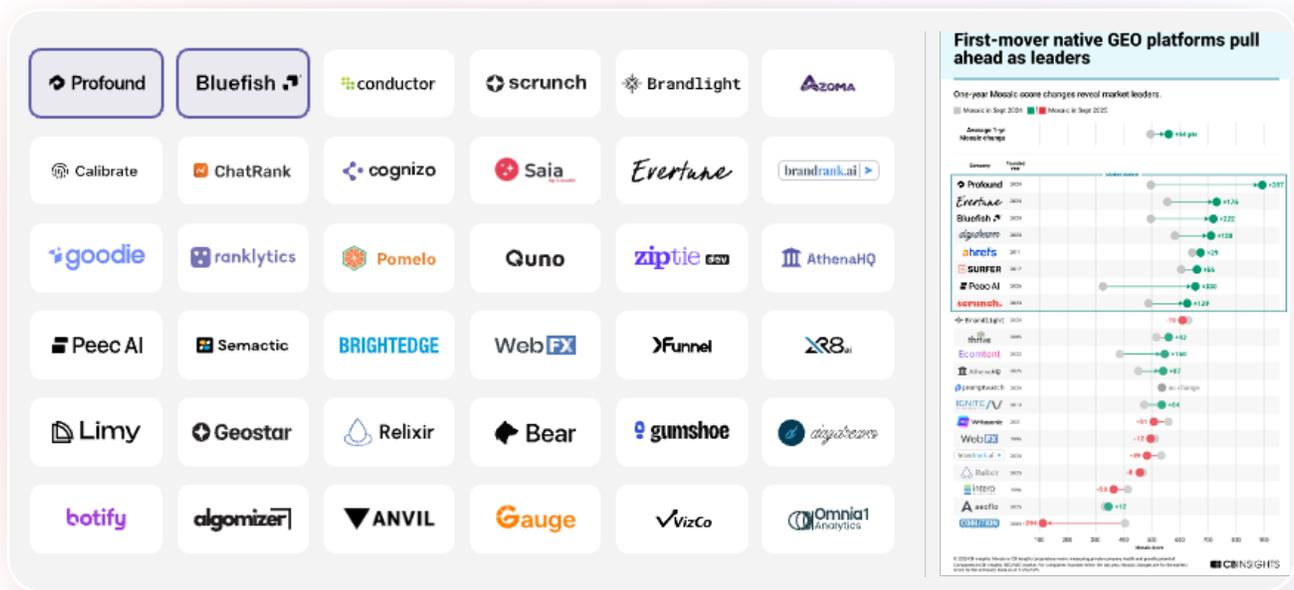
The probabilistic nature of LLMs means that the same prompt entered into an AI engine can produce vastly different responses, with the exact nature of how an LLM produces a response still not fully known. Consumer discovery is shifting from predictable, link-based results to decisions driven by “black box” LLM that decide what content is surfaced to consumers. Direct brand-to-model relationships that shape content prioritization seem set to emerge, as AI engines face pressure to reintroduce paid influence, potentially challenging the perception of AI platforms as being neutral.

MARKET MAP

Leading Companies in the Space

The GEO/AEO market is nascent but maturing rapidly. Dozens of startups are experimenting, but only a handful of emerging leaders are driving the most value for the largest and most complex brands. The market landscape below demonstrates the number of startups entering the space as well as SEO incumbents pivoting to include GEO/AEO products and

GEO/AEO COMPANY LANDSCAPE



Bluefish AI and Profound have quickly emerged as early leaders in the space

with both tackling GEO in different ways:

Bluefish AI

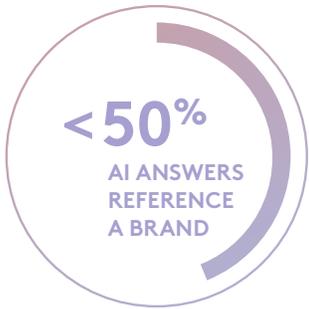
Provides an enterprise-ready platform that combines monitoring, optimization, and measurement across 14+ AI integrations.

Profound

Boasts a large scale proprietary data panel, advanced visibility analytics, and recent \$35M Series B led by Sequoia underscoring its scale and leadership.

Profound and Bluefish are both part of the LIFT Labs 2025 Fall Accelerator cohort, and as enterprises enter the discovery and experimentation phase, both companies are the thought leaders helping Comcast teams spanning functions such as Marketing, Communications, PR and eCommerce better understand how adoption takes root.

THREE EMERGING THEMES



01. Measurement Starts Before the Click

In GEO, success isn't defined by web traffic alone. The leading indicators now live upstream of the click: how often a brand is cited in answers, which third-party URLs are influencing those answers, and how frequently AI crawlers are pulling from brand-owned web domains. Currently, fewer than half of AI answers reference a brand, underscoring the visibility gap in AI search. Enterprises are already treating these as KPIs. Platforms like Profound log ChatGPT-to-site referrals, crawler activity, and citation share as signals of brand health. For Comcast, that means evolving measurement frameworks, tracking not just "did we get the click?" but "did the LLM understand our value proposition and recommend us in the first place?"

02. SEO + GEO Continuum - and the Rise of AI Agents as Visitors

SEO isn't dead, it's the gateway to GEO. If your content isn't crawlable, structured, and indexable, it won't appear in AI answers. The quiet truth is that AI engines still depend on Google's indexing infrastructure to organize and prioritize what they "see" online. When Google recently [tweaked its search algorithm](#) to reduce the number of results an API query would return from 100 results to only 10, [visibility dropped for ~88 percent of websites](#)—squeezing the very pipelines AI crawlers use to learn and cite. Reddit, for example, fell from roughly 40 percent of ChatGPT citations earlier this year to under 5 percent today. SEO, then, is critical but not sufficient; the new battleground is your share of AI answers, whether assistants like ChatGPT, Copilot, and Gemini include and recommend you.



By 2027, 80–90 percent of site "visits" may come from AI crawlers, making autonomous agents the primary audience enterprises must serve. [Early survey data even suggests that visitors to websites coming from AI engines are higher intent and convert better than organic search visitors.](#) However, SEO is now only table stakes. The battleground has shifted to what share of the AI answers your enterprise commands and whether assistants like ChatGPT, Copilot, and Gemini include and recommend you.

WHO AI ENGINES TRUST MOST



03. Third-Party Sources Can Define Your Narrative

AI engine developers like OpenAI and Perplexity currently design LLM-powered search engines to provide objective assessments of brands. As Tobey Van Santvoord, Head of Sales, at LIFT Labs portfolio company Bluefish notes, AI answer engines increasingly lean on perceived neutral authorities such as Wikipedia, government sites, trusted media, and influential community platforms, such as Reddit, meaning that visibility and framing in those environments can matter more than what appears on brand owned channels. Data suggests that Google AI Overviews are even [increasingly citing YouTube videos in their responses](#).

Robust GEO strategies seek to actively shape presence across these third-party platforms,

that carry disproportionate weight in AI answers. What appears in those answers isn't just whether brands like Comcast are mentioned, but how they are framed with positive or negative sentiment capable of shifting brand perception. Ensuring brand-owned content and messaging are balanced with credible third-party validation helps safeguard and strengthen enterprise narratives in the AI era.

GEO AND COMBATTING DISINTERMEDIATED AI COMMERCE

In the bigger picture, enterprises will need to get serious about developing robust GEO strategy.

The current moment is likely only the beginning of a more radical secular shift towards **decreasing direct interaction between brands and consumers.**

While AI today is primarily assisting consumers in discovering, researching and purchasing products and services, the ground continues to shift rapidly under the collective feet, with examples such as [Walmart's recent announcement that they will allow shoppers](#) to discover and purchase items directly within ChatGPT via the model developer's Instant Checkout feature without the consumer ever visiting Walmart's website. [OpenAI has admitted](#) that in this user experience, it will be ChatGPT, not the

brands themselves, who will control what and how products are surfaced and framed to users.

However, that is not all, as the **future of AI-powered digital commerce looks more like humans offloading entire categories of customer journeys to personal AI consumer bots and not being involved in the consumption decision process at all.** AI buyer bots will not be influenced by attractive packaging or compelling advertising the way humans are, neutralizing many of the key levers available to marketers.

This suggests that enterprises must employ a two-pronged approach to adapting to the emerging AI-first digital economy that acknowledges that all digital commerce is likely to fall above or below an "automation line". Below this automation line, consumers will convey goals and outcomes to an AI assistant, e.g. "find me the best internet package at the most affordable price" and allow the AI to autonomously manage the entire journey from discovery to purchase. Above the automation line, consumption decisions might be influenced by AI but will ultimately likely still be partly emotion-, identity-, or status-driven.

Enterprises must therefore (1) win when journeys fall “below the line” while (2) pulling borderline journeys “above the line” often enough for brand-building to matter. Below the line, the goal will be to make sure AI-mediated paths still land on your products and properties, even if the consumer never consciously chooses you from a list of options. Above the line, the objective will be to preserve enough human visible, emotionally resonant experiences that allow brand, identity, and status to continue to shape long term preferences. The strategic challenge is not choosing one or the other but deliberately designing portfolios of journeys that span both

According to Bluefish’s Van Santvoord, the parts of the customer journey moving fastest below this automation line are those driven by clear intent and immediate purchase decisions, such as product discovery, comparison, and the transactional steps themselves. AI is well suited to automate these high frequency, high velocity interactions, guiding consumers toward conversion with little or no human intervention. Van Santvoord advises enterprises to let AI handle these repeatable moments while concentrating human talent on differentiated, high value experiences such as complex consultative sales, service recovery, and relationship building. The challenge is to ensure that automated

touchpoints remain context aware, on brand, and anchored in a coherent brand truth so that the emotional and identity based throughline of the brand still comes through, even when most of the journey is owned by an AI agent.

GEO is critical in both scenarios. According to Profound’s Blyskal, defending the “core brand message” and the “throughline of the brand” within AI models will be for establishing the emotional narratives that are surfaced to AI search engine users in their AI-assisted product discovery journeys. Below the line, optimizing your brand’s digital presence for AI interpretability will continue to be essential.

CLOSING THOUGHT

Traditional SEO gets your content indexed; GEO is what gets your brand cited, recommended, and ultimately selected by LLMs. More than half of U.S. searches now also surface AI answers, and some estimates even [project ChatGPT rivaling Google in terms of search traffic by as soon as 2030](#).

Without a doubt, discovery has shifted: the digital economy first moved from a web built for humans, to a web built for Google, and now to an online ecosystem that must be optimized for AI.

This is the first time in history the Internet is effectively “speaking back”, summarizing, interpreting, and recommending brands on our behalf. In this world, it is not enough to know whether brand pages are properly indexed; companies need to understand how AI agents are actually interpreting and talking about the brand. That includes visibility, the quality of sentiment, and the third-party sources framing brand narratives.

The mandate is clear: GEO is more than just a marketing tactic, it is enterprise’s entry point into navigating the new age of agentic commerce. The space is still early, and enterprises that act now to optimize how LLMs view their brands will gain a significant advantage, positioning themselves to maintain and grow both mind share and market share in a future AI agent-first marketplace. Those that wait risk becoming invisible or, worse, negatively framed in the answers customers are increasingly trusting.

In a follow up to this white paper, LIFT Labs will continue to explore and provide insight into the rise of agentic commerce in partnership with teams at Comcast NBCUniversal as well as with startups like Bluefish and Profound.