PARTNER MARKET REPORT | AUGUST 2026

The SEO-to-AEO Transition

The $30–$50 Billion Digital Discovery Shift — and the New Opportunity for Agencies

Search is becoming an answer layer. Businesses now face three structural risks: loss of narrative control, premature technology commitments, and difficulty validating expert recommendations.

$30–$50B

ESTIMATED ANNUAL AEO-INFLUENCED SPENDING BY 2030

A research-led framework for agencies helping clients adapt without betting on an immature technology stack.

AEO = Answer Engine Optimization: the practice of structuring and publishing business information so it is accurately represented in AI-generated answers, not just ranked in traditional search results.

Prepared by CRSTBL • August 2026

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EXECUTIVE SUMMARY

AEO expands the discovery stack

The transition from search rankings to generated answers is creating a new layer of software, services, content operations, structured data, and integration work. We estimate $8–$15 billion of global annual spending is already influenced by AEO, with a plausible $30–$50 billion annual market by 2030.

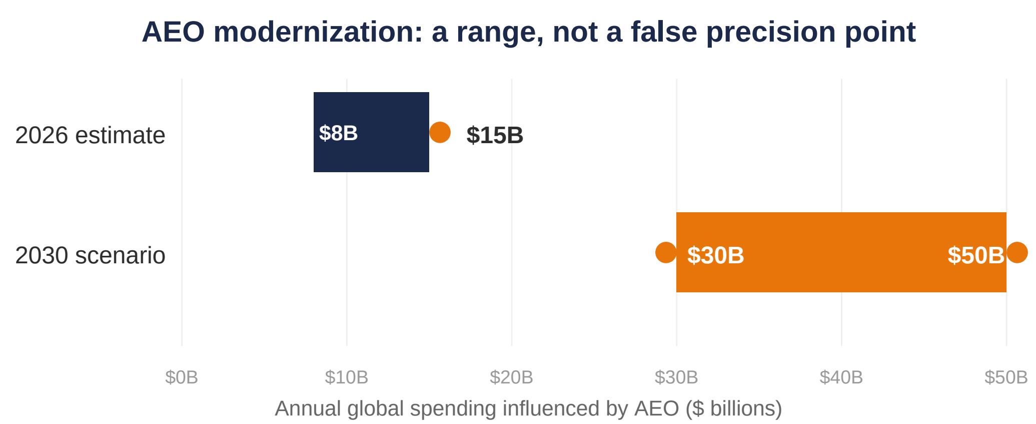


Figure 1. Estimated global annual spending influenced by AEO.

CRSTBL estimate; methodology summarized on page 11.

What the number means. The estimate includes AEO measurement software, content and optimization services, structured business information, publishing infrastructure, and implementation. It is not a forecast that SEO disappears. Much of the spending will be reallocated from SEO and content budgets; the rest will be net-new infrastructure and advisory work. Because the estimate blends reallocated and net-new spending, agencies should interpret it as the total addressable budget pool, not purely incremental revenue.

The commercial opening for agencies is larger than tool resale. Clients need help deciding what information should become authoritative, how it should be published, which AI surfaces matter, and when a technology investment has demonstrated enough utility to scale.

THE DISCOVERY TRANSITION

The interface is moving closer to the decision

Figure 2. A simplified history of digital discovery interfaces.

Traditional SEO optimized a business for ranked links. AEO must also prepare the business for synthesized answers, comparisons, recommendations, and increasingly agentic actions. The website remains important, but it is no longer guaranteed to be the first place a customer encounters the brand narrative.

The 2026 milestone is agents: AI systems that do not simply answer a question but take action on the user's behalf — booking a table, comparing prices, placing an order. Businesses that have already structured their information for answer engines are better positioned when those engines begin to act, not just summarize. Agencies that understand this progression can help clients prepare for the next interface, not just the current one.

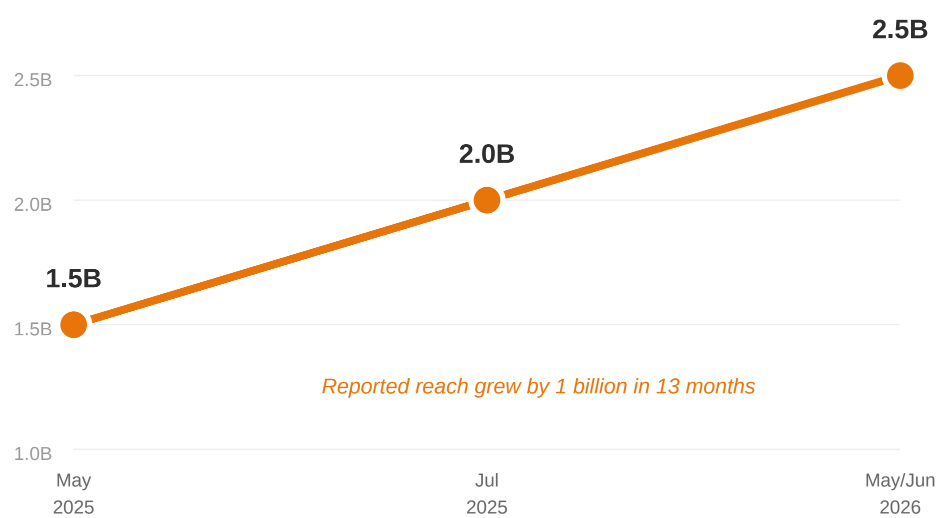


Figure 3. Reported monthly reach of Google AI Overviews.

Sources: Google/Alphabet. 1.5B monthly users (May 2025, earnings call); 2.0B (July 2025, Q2 earnings call); 2.5B (May 2026, I/O keynote; reiterated June 3, 2026 blog post).

Google reported 2.5 billion monthly users for AI Overviews by mid-2026 and more than 1 billion monthly users for AI Mode. The transition is being embedded inside mainstream search rather than occurring only in standalone chat products.

MARKET EVIDENCE

Spending signals are moving faster than standards

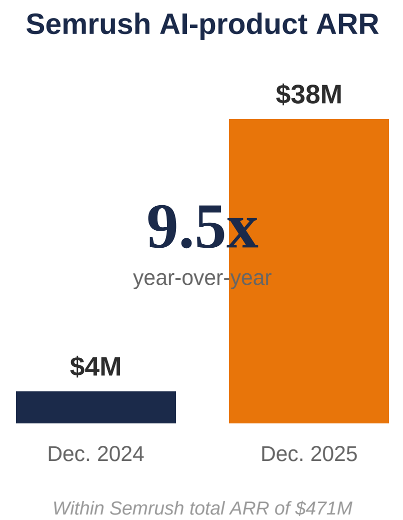


Figure 4. Semrush reported AI-product ARR.

Source: Semrush FY2025 results, March 2, 2026.

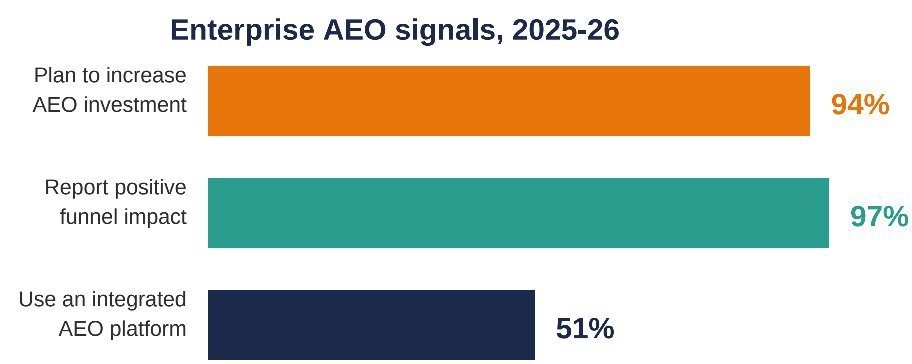


Figure 5. Enterprise adoption and investment signals.

Source: Conductor, "The State of AEO/GEO in 2026: CMO Investment Report." Survey of 250+ U.S. enterprise digital leaders. See interpretive note below.

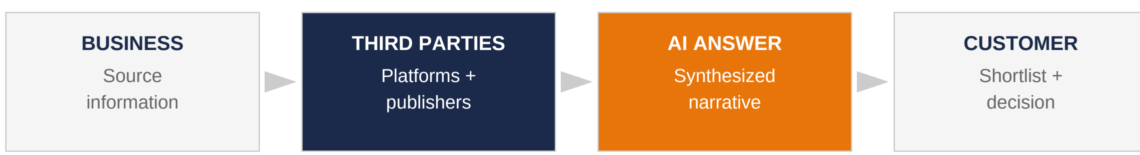
The software category is still emerging, but the demand signal is measurable. Semrush reported that AI-product ARR increased from $4 million to $38 million during 2025 — a 9.5× increase, though from a small base within a $471 million total ARR business. Conductor found that 94% of surveyed enterprise digital leaders planned to increase AEO spending in 2026, while 51% already used an integrated AEO platform.

Interpretive note on the Conductor data. The Conductor survey drew from enterprise digital leaders, many of whom are existing Conductor customers. 73% of respondents classified their own AEO programs as “advanced” or “very advanced.” The 97% positive-impact and 94% increased-investment figures are therefore directional, not representative of the broader market. They establish that committed early adopters are doubling down — a meaningful signal — but should not be read as a census of all enterprises.

These vendor-reported figures should be treated as directional. They establish commercial momentum, but they do not yet provide a clean market census. Definitions differ, products bundle SEO and AEO capabilities, and services spending is frequently counted separately.

RISK 1

Loss of narrative control



Control declines as interpretation layers increase

Figure 6. AI-driven disintermediation adds interpretation layers between a business and its customer.

Answer engines assemble responses from multiple sources. A business may supply one source, but platforms, directories, publishers, reviews, and other third parties can influence the synthesized answer. Inaccurate or outdated information can be difficult to trace and correct.

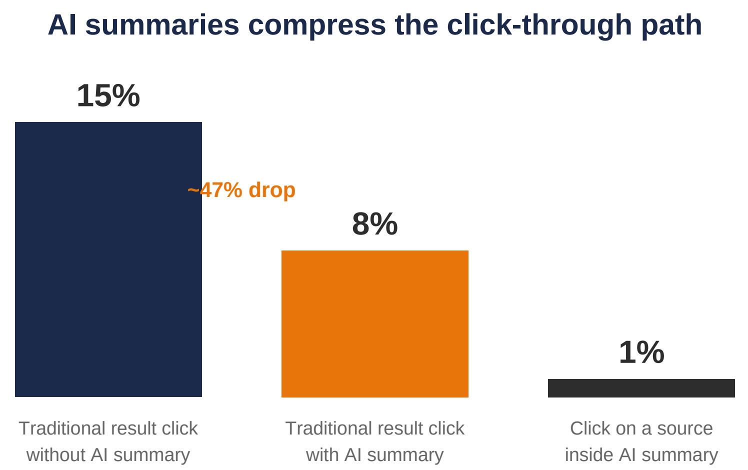


Figure 7. Observed click behavior when Google displayed an AI summary.

Source: Pew Research Center analysis of U.S. browsing data collected March 2025 (published July 22, 2025).

Pew observed traditional-result clicks in 8% of visits with an AI summary, versus 15% without one. Only 1% clicked a source inside the summary. The agency opportunity is to help clients build authoritative, machine-accessible business context and monitor how answer systems represent it.

A note on timing. *The Pew data reflects browsing behavior from March 2025, before Google merged AI Overviews with AI Mode and added "Preferred Sources" labels (both mid-2026). Click dynamics may have shifted since then. The directional finding — that AI summaries compress the click-through path — is consistent with subsequent industry data, but the specific percentages should be treated as a baseline, not a current snapshot.*

RISK 2

Premature technology commitments

AEO platforms, model behavior, protocols, attribution methods, and publishing standards are evolving simultaneously. A complex implementation can create expensive switching costs before the market has produced stable winners.

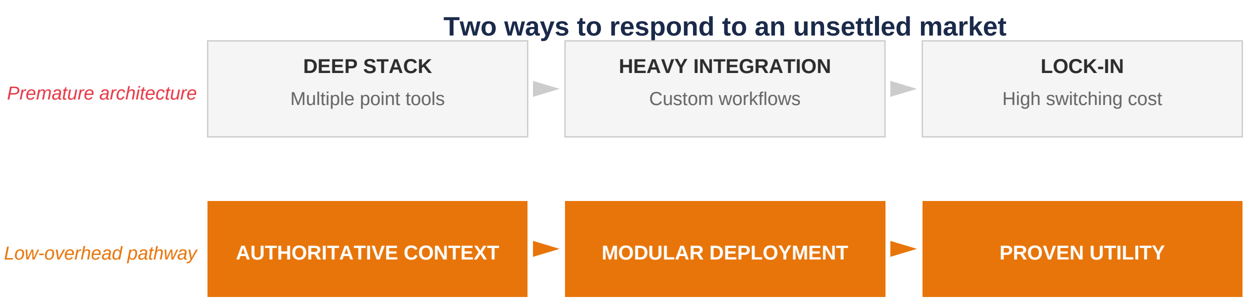


Figure 8. A modular pathway limits lock-in while standards evolve.

The practical response is not inaction. Businesses can establish authoritative information, publish it in adaptable formats, deploy a measurable customer-facing use case, and add integrations only after utility is demonstrated.

Agency principle. Minimize irreversible architecture. Favor systems that can launch quickly, export data, work alongside existing websites and content platforms, and produce value even if a particular answer engine or protocol changes.

CRSTBL addresses this risk through low/no-code deployment, structured business context, hosted discovery surfaces, conversational interfaces (CRSTA), AI discovery publishing (Cumae), and selective API or open-standard connectivity including MCP. The goal is useful infrastructure with limited implementation overhead — not a speculative deep stack.

RISK 3

Expertise must be validated by utility

Even experienced marketers cannot reliably predict which AEO tactics, vendors, or standards will remain important. Recommendations should therefore be treated as testable operating hypotheses, not permanent architecture decisions.

Validate expertise through an evidence ladder

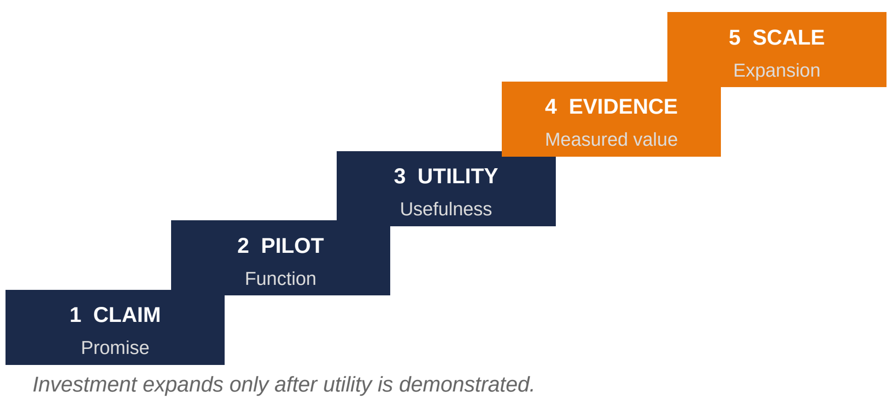


Figure 9. An evidence ladder for agency recommendations.

A strong agency earns trust by narrowing uncertainty: define the client problem, run a contained deployment, measure whether it helps, and expand only when the evidence supports the next investment.

CRSTBL Agency Partner Advisory Board *(launching Q4 2026).* CRSTBL will provide an open forum for agency partners to cross-pollinate best practices, share implementation experience, and surface best-of-breed solutions. The forum is designed to improve collective judgment without implying that CRSTBL or any participant can guarantee a particular vendor, tactic, or standard.

**Open to participation by all CRSTBL agency partners. Participation does not constitute CRSTBL endorsement of any vendor or solution.*

BOUNDARIES

What this report is not claiming

AEO is attracting significant vendor marketing and speculative claims. Agencies evaluating this space — and advising clients on it — benefit from knowing what the evidence does and does not support. This report does not claim:

— That SEO is dead or declining. SEO budgets are large and growing. AEO is expanding the discovery stack, not replacing it.

— That AEO tools have proven ROI at scale. The category is early. Demand signals are strong, but most measurement frameworks are still being established.

— That there is a single winning AEO platform, protocol, or standard. The market is pre-consolidation. Agencies should advise modular, reversible approaches.

— That the $30–$50 billion estimate is a precise forecast. It is a modeled range designed to frame the commercial opportunity, not to predict a specific outcome. The actual figure could fall outside it.

— That any specific citation rate, click-through change, or AI visibility metric will persist as platforms evolve. The data cited here is directional. Treat magnitudes as approximate and direction as the part to plan around.

Agencies that can hold this line with clients — honest about what is known and what is not — will build more trust and longer retainers than those selling certainty in an uncertain market.

Turn uncertainty into a recurring advisory service

1	2	3	4	5
AUDIT	**STRUCTURE**	**DEPLOY**	**MEASURE**	**EXPAND**
Find gaps	Create context	Start conversations	Capture intent	Connect selectively

Figure 10. A phased, reversible client adoption pathway.

The partner opportunity spans five service lines: business-information audits, context preparation, AI representation monitoring, conversation deployment, and ongoing optimization. Agencies can start with a contained use case and build recurring work around updates, measurement, content gaps, and client strategy.

CRSTBL supplies the operational layer. Partners can package Conversation Agents (CRSTA) and AI Discovery (Cumae) for clients while maintaining the advisory relationship. Client menus, products, services, locations, and sales knowledge become structured context that powers conversations today and improves future discovery readiness.

A practical first engagement

Select one client with meaningful website traffic or a complex product, service, or location portfolio. Audit how its information appears across the website and AI surfaces, deploy one controlled conversational role, and use actual customer questions to identify the next context and content priorities.

90-DAY PARTNER RAMP-UP

Start with one client. No CRSTBL platform fees for 90 days. CRSTBL’s team builds every agent alongside yours. Scale to five clients in parallel when your team is ready.

At day 90: a measured cost-per-conversation report, real visitor intent data, and up to five reference deployments to sell the next fifty clients with.

Your consulting and project fees remain yours. See commission details at crstbl.com/partner-commission-schedule

Not an agency? CRSTBL also operates a Referral and Solutions Partner track for individuals and businesses that introduce clients to the platform. Details at crstbl.com/partners/referral.

1 CLIENT

AUDIT • STRUCTURE • DEPLOY • MEASURE • EXPAND

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METHODOLOGY AND SOURCE NOTES

How to interpret the estimate

CRSTBL's estimate is a modeled range, not a third-party market census. It triangulates published SEO-services estimates, observable AEO software revenue, enterprise budget signals, and an allowance for structured-data and implementation work that is not consistently captured in SEO categories. The range reflects the midpoint of multiple scenarios; the actual figure could fall outside it.

2026 range: Published estimates place the 2025 global SEO-services market near \$75–\$87 billion. Applying a conservative 6%–12% AEO-influenced share implies approximately \$4.5–\$10.4 billion in redirected services and content spending. Adding approximately \$2.5–\$4.0 billion for AEO software, data preparation, publishing infrastructure, and integration produces a rounded \$8–\$15 billion annual estimate.

2030 scenario: Published SEO-services forecasts vary widely. We use a conservative \$115–\$150 billion reference base, apply a 20%–30% AEO-influenced share, and add \$7–\$12 billion of software and infrastructure. Overlap and uncertainty are removed by rounding the resulting range to \$30–\$50 billion.

Scope: The estimate includes software, services, content operations, structured business information, publishing infrastructure, and implementation. It excludes paid search advertising and the underlying cost of training or operating general-purpose AI models.

Composition note: A significant portion of the estimated spending represents existing SEO and content budgets being redirected toward AEO activities, not purely net-new spending. For agencies evaluating the revenue opportunity, the relevant question is how much of this budget pool they can capture through new service lines — whether the dollars are reallocated or incremental.

Sources

1. Google/Alphabet. AI Overviews reach: 1.5B monthly users (May 2025, earnings call), 2.0B (July 2025, Q2 earnings call), 2.5B (May 2026, I/O keynote; reiterated June 3, 2026 blog post). blog.google and abc.xyz investor materials.

2. Pew Research Center. "Google users are less likely to click on links when an AI summary appears in the results." July 22, 2025. Analysis of browsing behavior collected March 2025.

3. Conductor. "The State of AEO/GEO in 2026: CMO Investment Report." Survey of 250+ U.S. enterprise digital leaders. Source for the 94% increased-investment, 97% positive-impact, and 51% integrated-platform figures.

4. Conductor. "The 2026 AEO/GEO Benchmarks Report." Analysis of 13,770 enterprise domains, 3.3 billion sessions, 21.9M Google searches and 17M AI-generated responses.

5. Semrush. Fourth Quarter and Full Year 2025 Financial Results. March 2, 2026. AI-product ARR of $38M as of December 31, 2025, up from $4M as of the prior year period. Total ARR $471.4M.

6. Mordor Intelligence. SEO Services Market size estimates, 2025–2031.

7. MarkNtel Advisors. Global SEO Services Market estimates, 2024–2030.

Forward-looking statement: Market estimates and scenarios are inherently uncertain. They should be used for strategic planning and discussion, not as a guarantee of market outcomes.

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