



CRACKING THE CODE ON SEARCH: SEO VS. GEO

OCTOBER 2025



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FULL-FUNNEL EXCELLENCE

Across the Beauty Customer Journey



2025 Media Agency of the Year/Silver



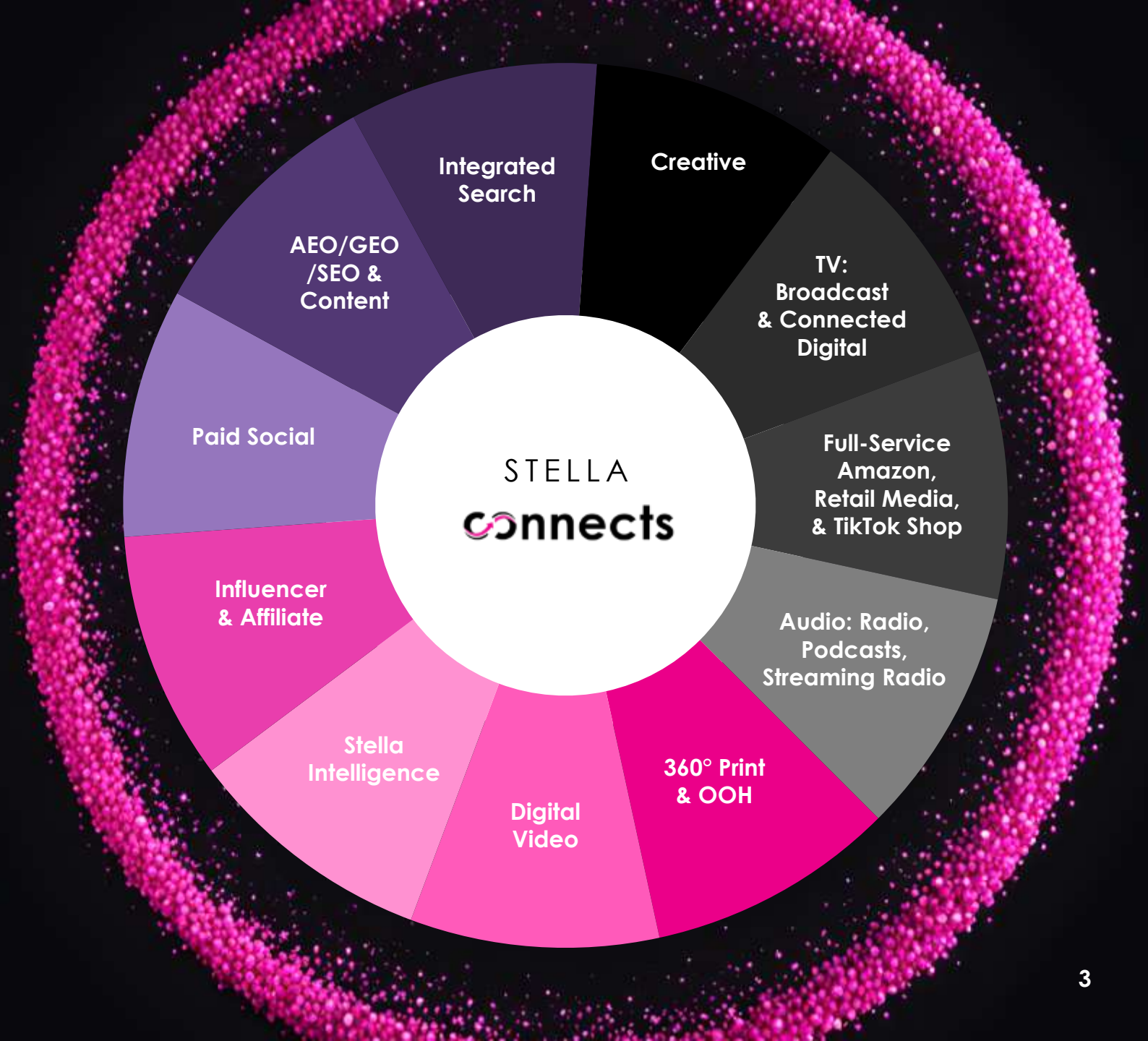
2022, 2023, 2024 Media Buying Agency of the Year



BEAUTY AGENCY OF THE YEAR

DIGITAL AGENCY OF THE YEAR

BEST BEAUTY CAMPAIGN



The Stella Beauty Multiplier

SEEING THE WORLD THROUGH A BEAUTY LENS

PLATFORM EXPERTISE

TikTok
Marketing Partners

TikTok Shop
Partner

Google
Premier Partner

Meta
Business Partner

Involved
MEDIA

amazon ads
Advanced partner

theTradeDesk

INNOVATION & AI



stellalabs

GLIMMER*

BEAUTY
CONSUMER
COMMUNITY

(Tok)Trak ChatTrak

DEEP BEAUTY EXPERIENCE

L'OCCITANE
EN PROVENCE

elf

LANEIGE

GROWN ALCHEMIST
BIOLOGICAL BEAUTY

Suave

Sulwhasoo

Dr Dennis Gross

L'ORÉAL

THE STATE OF SEARCH

Significant shifts have happened in 2025 to the way users are searching—and our SEO practices are adapting to optimize for search everywhere.

AI OVERVIEWS/AI MODE

- 13% of all search queries triggered an AI Overview as of March 2025.
- 88.1% of those queries are considered informational.
- Keywords that prompt AI Overviews tend to exhibit higher zero-click rates. A study by Ahrefs found a 34.5% drop in position 1 CTR when AI Overviews were present.

LLMs

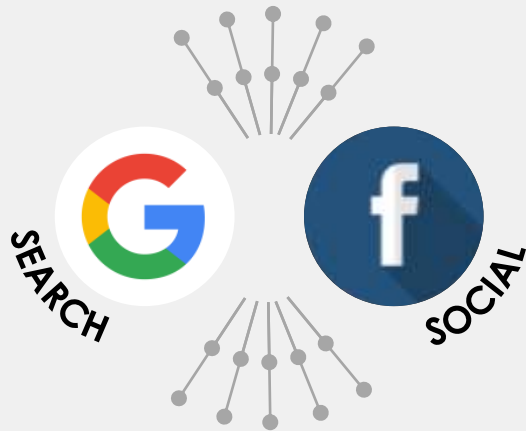
- Around 1 in 5 internet users (aka humans) worldwide use ChatGPT every month.
- By mid 2025, ChatGPT overtook Bing for web traffic daily.
- Since the beginning of June, Google AI mode adoption is growing steadily at 4.08% per day.

SOCIAL SEARCH

- Google has increased “multimodal” search features that pull video and images from disparate sources like YouTube and TikTok.
- 40% of Americans have used TikTok as a search engine. That percentage rises to 64% among Gen Z.
- 10% of Gen Z says they are more likely to use TikTok than Google to search.

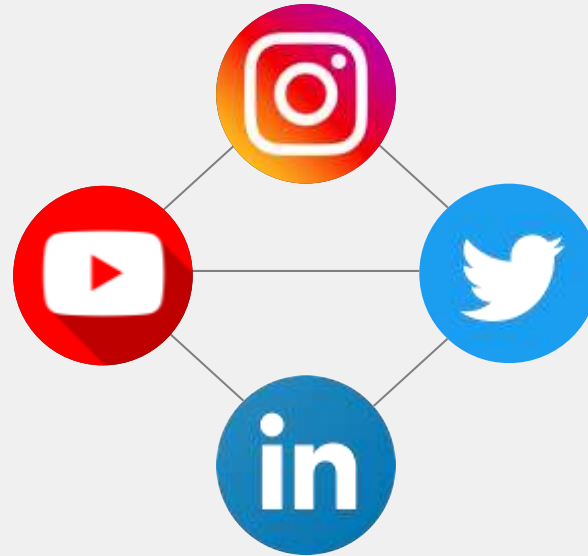
THE EVOLUTION OF **DIGITAL MARKETING**

2010-2015
THE DUOPOLY ERA

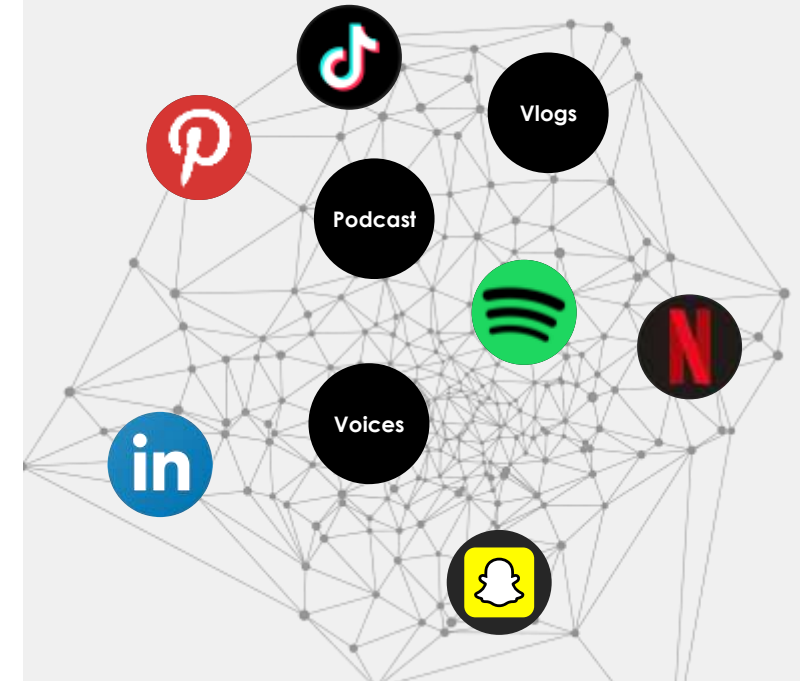


80%+ MARKET SHARE

2016-2020
THE SHIFT BEGINS



2021-2025
THE GREAT DECENTRALIZATION

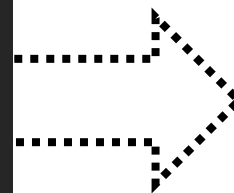




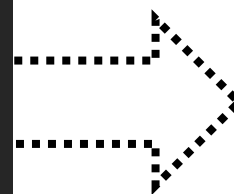
**NEW BEAUTY
CONSUMER INSIGHTS** |

GLIMMER. Pulse:

AI Adoption & Shopping

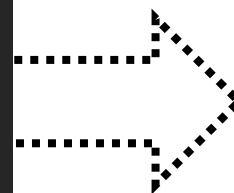


63% have used an AI tool
such as Gemini or ChatGPT



75% ask AI to act as an "expert,"
indicating a high trust level

*but 54% check a brand website
before they trust AI's answer*



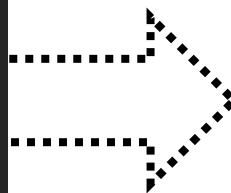
In shopping, after information lookup,
the most common AI uses are **checking
live prices (41%)** and creating product
comparison tables (32%)



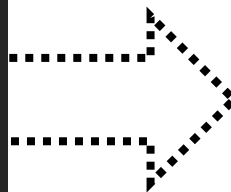
GLIMMER.

Pulse:

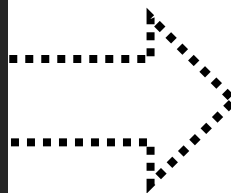
AI Adoption & Beauty Shopping Behaviors



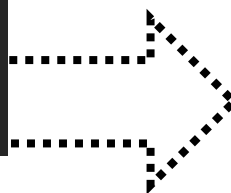
30% say that AI-powered product comparisons have **influenced a beauty purchase** in the last six months



64% would like AI's analysis when it comes to color matching



It's AI + HI: 64% seek out human reviews after AI recommends a beauty product



Accuracy is the greatest concern as it pertains to AI and beauty shopping

GLIMMER. Pulse:

Everyday Consumers on AI & Shopping

AI gave a detailed breakdown that **helped me feel more confident in my product choice. I still checked some user reviews afterward just to be sure**, but overall, it made the process way less overwhelming. Definitely not a perfect replacement for trying things in person, but for research and narrowing down options, it's been super useful.

I will use AI **if it makes the shopping experience and process more seamless** and relevant to me and cuts down on search time.

I'm not really into using AI. **I'd rather just type what I'm looking for into search** and get results that way.

I've used it when I don't have the time to compare products and price.



SOCIAL
SEARCH |

Key Transformative Shifts

Beauty brands must meet consumers at these dynamic new digital touchpoints. →



67% of consumers now search on social platforms



Gen Z drives 64% of beauty searches on TikTok



Social search spans the entire purchase journey (awareness to conversion)



AI integration delivers hyper-personalized beauty discovery

The **New** Organic Search Funnel

The new organic search funnel has expanded to encompass several search surfaces including social, Generative AI, traditional search and Retail Media search.

Marketers and brands that understand and support this journey in a strategic, omnichannel approach will see the most success in the future.

Search Channels Influence All Parts of the Funnel, but Each Has Its Strengths



■ Strong influence ■ Some influence

Source: EMARKETER Analysis, July 2025

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EM EMARKETER

Social Search's Underrated Role in a Splintering Landscape

Search behavior has shifted from solely classic engines (Google) to now include platforms where beauty is discovered via feeds and creators.

- **Google is still the leader in traditional search** (93% of U.S. consumers searched on it in the past year), but search behavior is fragmenting.
- **Consumers search wherever they spend time**—and with the average U.S. consumer on social media for 90 minutes a day, social platforms have become powerful search engines.
- **Four of the seven most widely used search platforms are social:**
 - 49% Search on YouTube
 - 44% Search on Facebook
 - 30% Search on Instagram
 - 29% Search on TikTok
- Social search outpaces GenAI-first tools like ChatGPT (26%) and Google Gemini (15.4%).

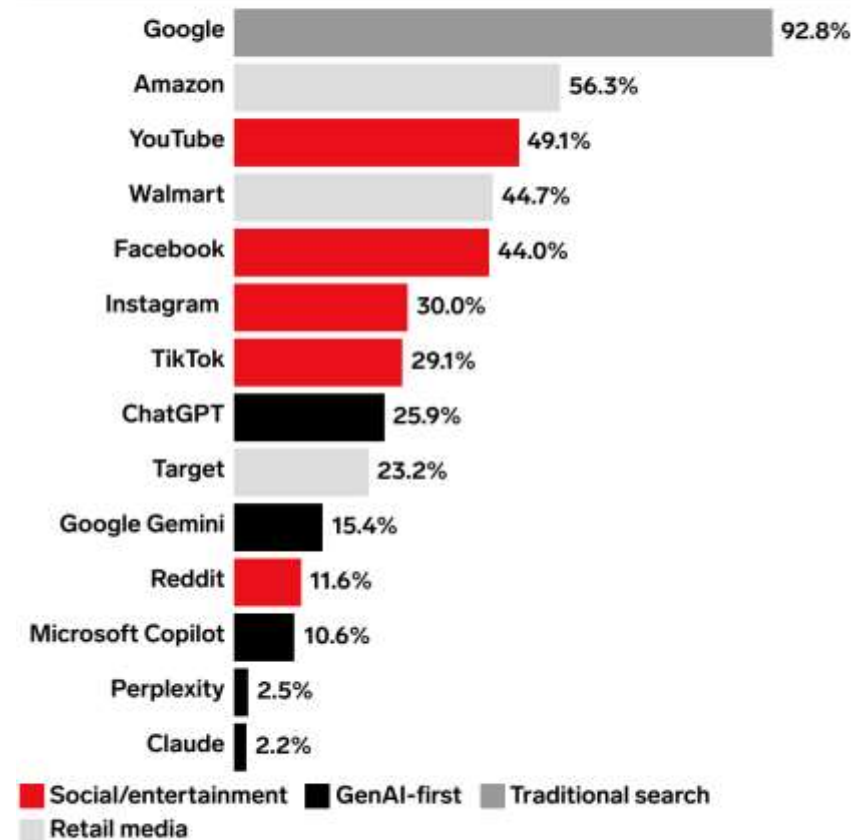
KEY TAKEAWAY → Brands must treat social platforms as essential discovery engines, not just content distribution channels.



More Consumers Search on Social Platforms Than on ChatGPT and Other GenAI-First Options

% of US consumers, March 2025

Q: Which of the following platforms have you used for search in the past 12 months? Select all that apply.



Note: n=1,458 ages 15-79

Source: EMARKETER Survey, "US Consumer Attitudes on Advertising and Emerging Platforms," April 2025

The Four Pillars of Social Search

PLATFORM FOUNDATIONS

- Profile setup & optimization
- TikTok Shop optimization
- Keyword research & marketplace analysis
- Competitor discovery & benchmarking
- Visibility tracking & analytics setup

POST & CONTENT STRATEGY

- Audience discovery & analysis
- Hashtag research & strategy
- Post frequency & cadence analysis
- Content gap analysis
- Engagement best practices audit
- Social channel E-E-A-T audits

ENGAGEMENT & GROWTH

- Trend discovery & reporting (monthly/quarterly)
- Content performance analysis
- Influencer / micro-influencer opportunity analysis
- Search intent & funnel mapping
- TikTok & YouTube UGC strategies

[ONGOING] CONTENT & CREATIVE

- Video & photo post optimization
- Captions, transcripts, and descriptions
- Storyboarding & creative ideation
- Short-form video editing and production



**ADDRESSING |
GEO**

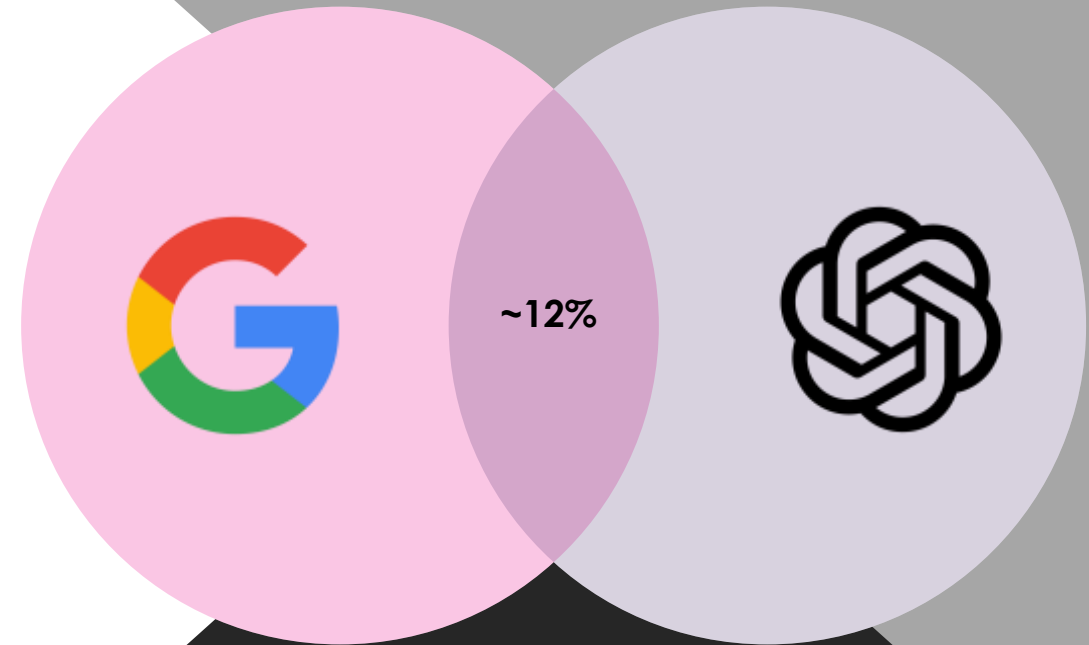
GEO VS. SEO

*ChatGPT results overlap with Google results only **8-12%** of the time*

Just because you dominate in Google does not mean you will in LLMs.

There are fundamental differences to how LLMs function vs. traditional search engines, from data retrieval and processing to user behavior, experience, and engagement.

The goals and core strategies of Generative Engine Optimization are tailored specifically to how LLMs work.



SEARCH IS NO LONGER CONFINED TO GOOGLE

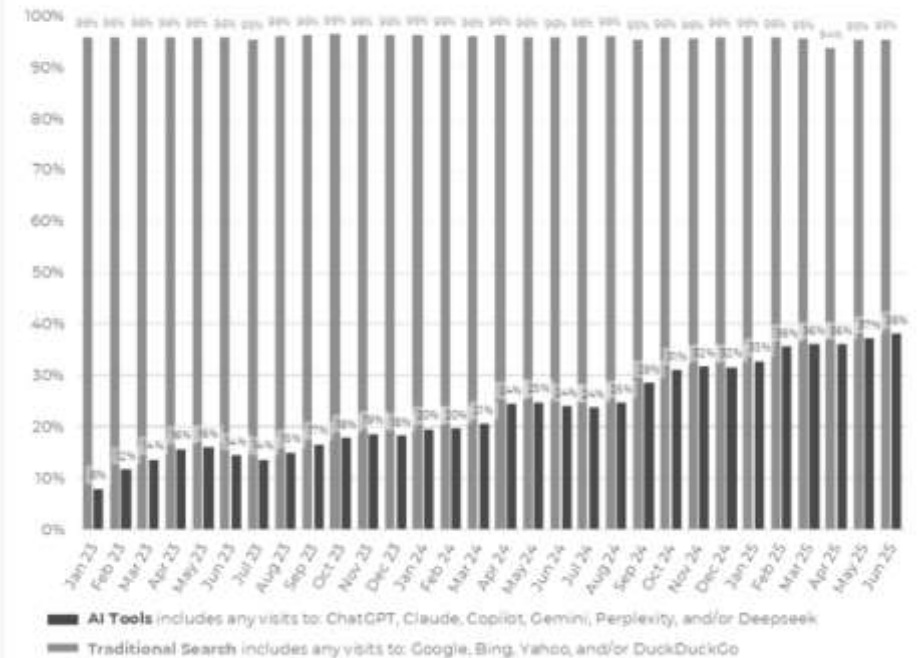
Consumers are discovering brands across Google, ChatGPT, TikTok, and beyond. As users turn to AI for complex, contextual questions, the winners in this new landscape won't just be the most **visible**—they'll be the most **recommended**.

Still, AI search isn't yet replacing traditional search; it's **additive**. While users still lean on Google, adoption of AI-driven discovery is skyrocketing:

- 1 in 5 consumers worldwide now use ChatGPT or similar tools for information
- AI Overviews appear on 13% of Google queries, often creating a zero-click landscape
- ChatGPT currently holds 60% of the U.S. generative AI chatbot market

Traditional Search vs. AI Tool Visits in the USA 2023-2025

(Percent of desktop devices with >1 visit/month to any of the included properties)



Source: multi-million device clickstream panel provided by **Datos**

Assembled & analyzed by **SparkToro**



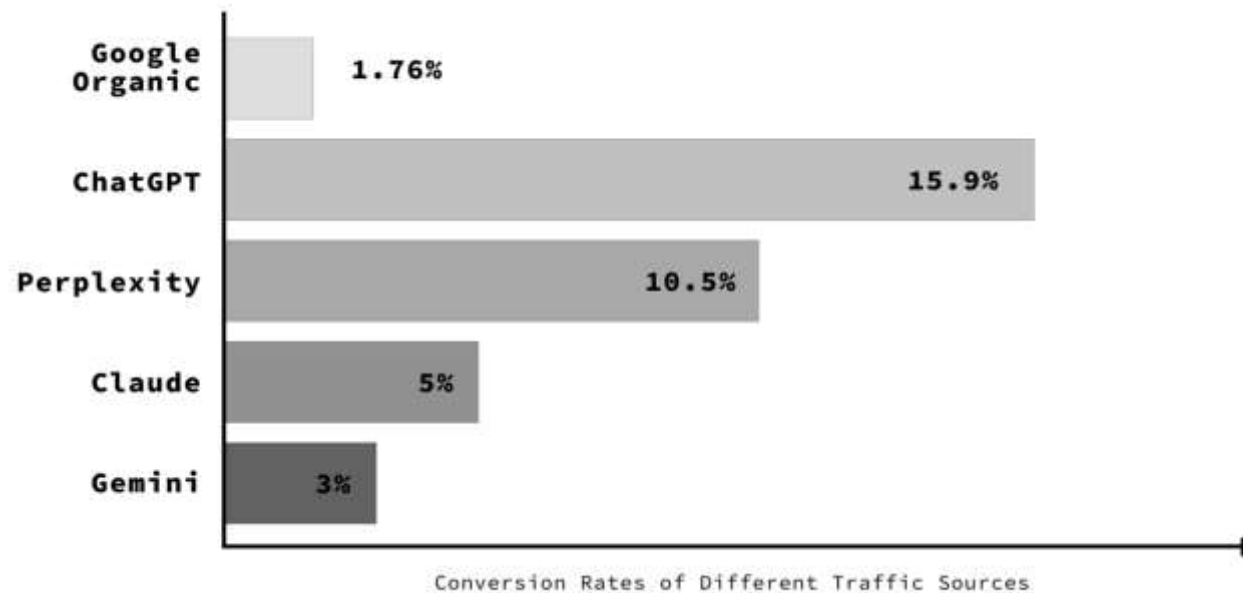
LEVEL-SETTING ON AI TERMINOLOGY

LLMs	Large Language Models trained to understand and generate text (e.g., ChatGPT, Perplexity, CoPilot). All LLMs are a type of Generative AI.
GENERATIVE AI	A broad class of AI that creates new content—text, images, video, code—based on its training and your prompt. Not all Generative AI models are LLMs (i.e. Dall-E & Midjourney).
GEO/AEO	Generative Engine Optimization or Answer Engine Optimization – like search engine optimization, but for LLMs.
AI OVERVIEW/ AIO	AI-generated summaries at the top of search results that quickly answer questions using aggregated web content. Released May 2024, but increased in prominence early 2025 & beyond.
AI MODE	New feature in Google Search that helps generate, summarize, or rewrite content using AI and a query fan-out technique. Released May 2025. An agentic checkout feature within AI Mode announced at Google I/O spurred buzz around agentic search, which is expected to be released “in the coming months.”
AGENTIC AI	Adds a layer of autonomy to Generative AI with reasoning and planning to proactively achieve goals through a sequence of actions.
MCP	Model Context Protocol, a recent open standard that allows AI models to connect with and act on external tools and data.
ACP	An open standard that enables a conversation between buyers, their AI agents, and businesses to complete a purchase.

CONVERSION RATES:

AI vs. Google Organic Search

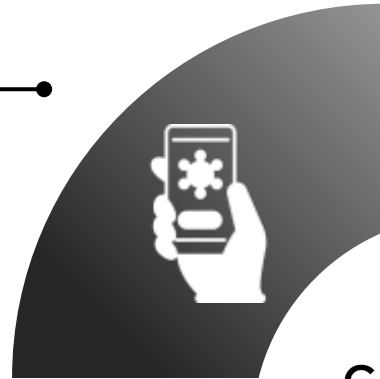
AI Search is proving to be a high-intent channel; businesses that fail to invest in building visibility now risk falling behind.



GENERATIVE ENGINE OPTIMIZATION

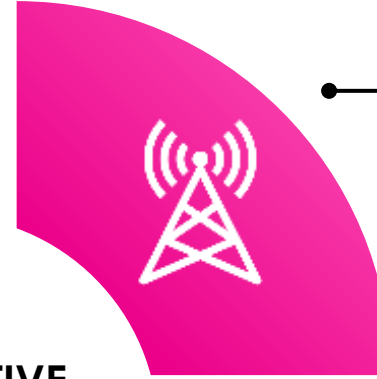
Retrievability Audits

Ensure AI can retrieve and process the content on your site.



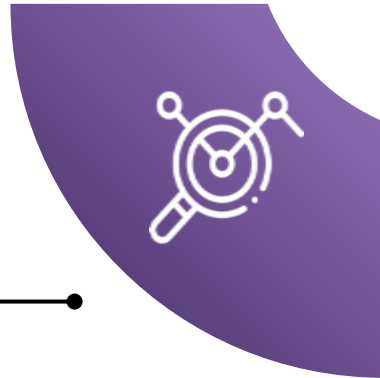
Off-site Signals

Understand your overall brand presence online and build authority.



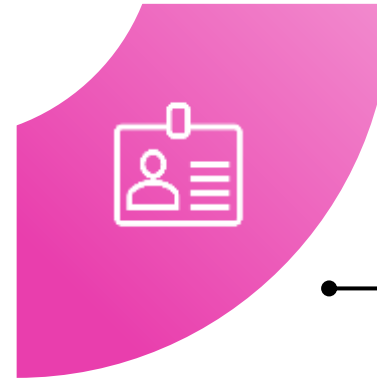
AI Prompt Visibility

Expand brand visibility for key prompts that people are asking in AI search.



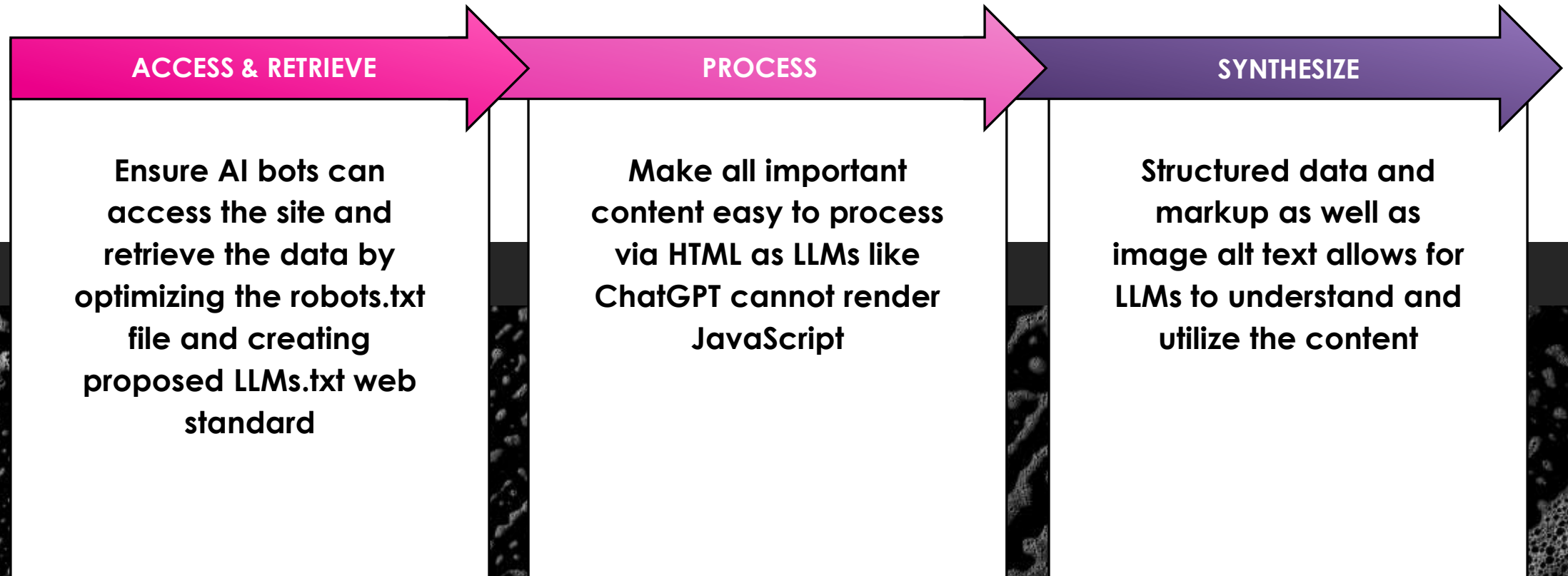
On-site Entity Building

Create entity-driven content and connections that tell your brand story.



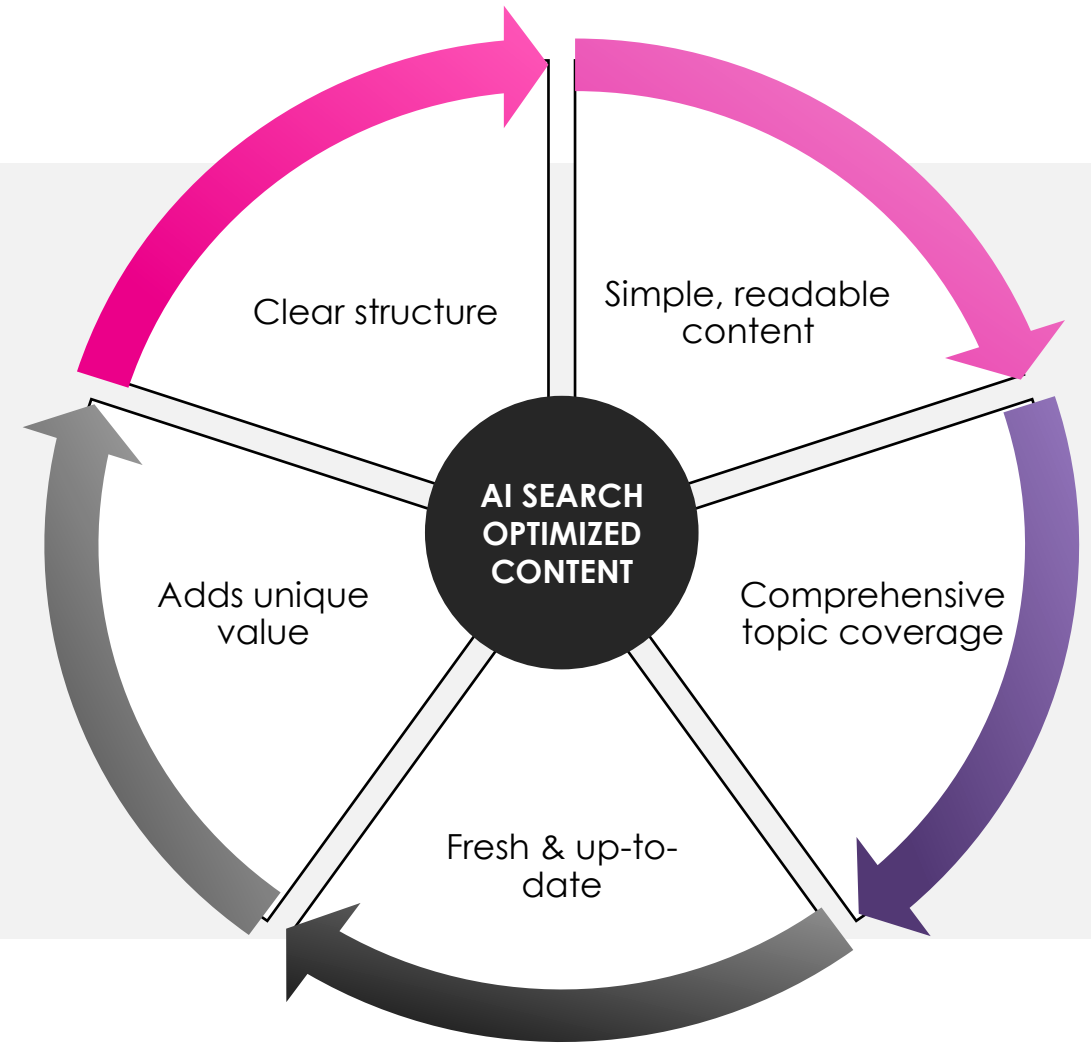
GENERATIVE
ENGINE
OPTIMIZATION

ENABLING DISCOVERY THROUGH TECHNICAL GEO



ENHANCING CONTENT FOR AI DISCOVERY

- 1.** **Structure content** with clear headings, lists, and markup
- 2.** **Ensure content fluency** with simple, quotable language
- 3.** **Be comprehensive** in answering all related queries
- 4.** **Keep content fresh** with up-to-date info & new content
- 5.** **Add unique value** with data, media, E-E-A-T signals & more



Building Credibility Beyond Your Website

Having a strong brand presence across the web is essential for AI recognizing and displaying your brand.

It's essential to look at your online presence through the lens of sources and citations surfaced in AI search.

AI
SEARCH

Organic Brand Mentions
Link Outreach

Paid Brand Mentions
Affiliate & PR Placements

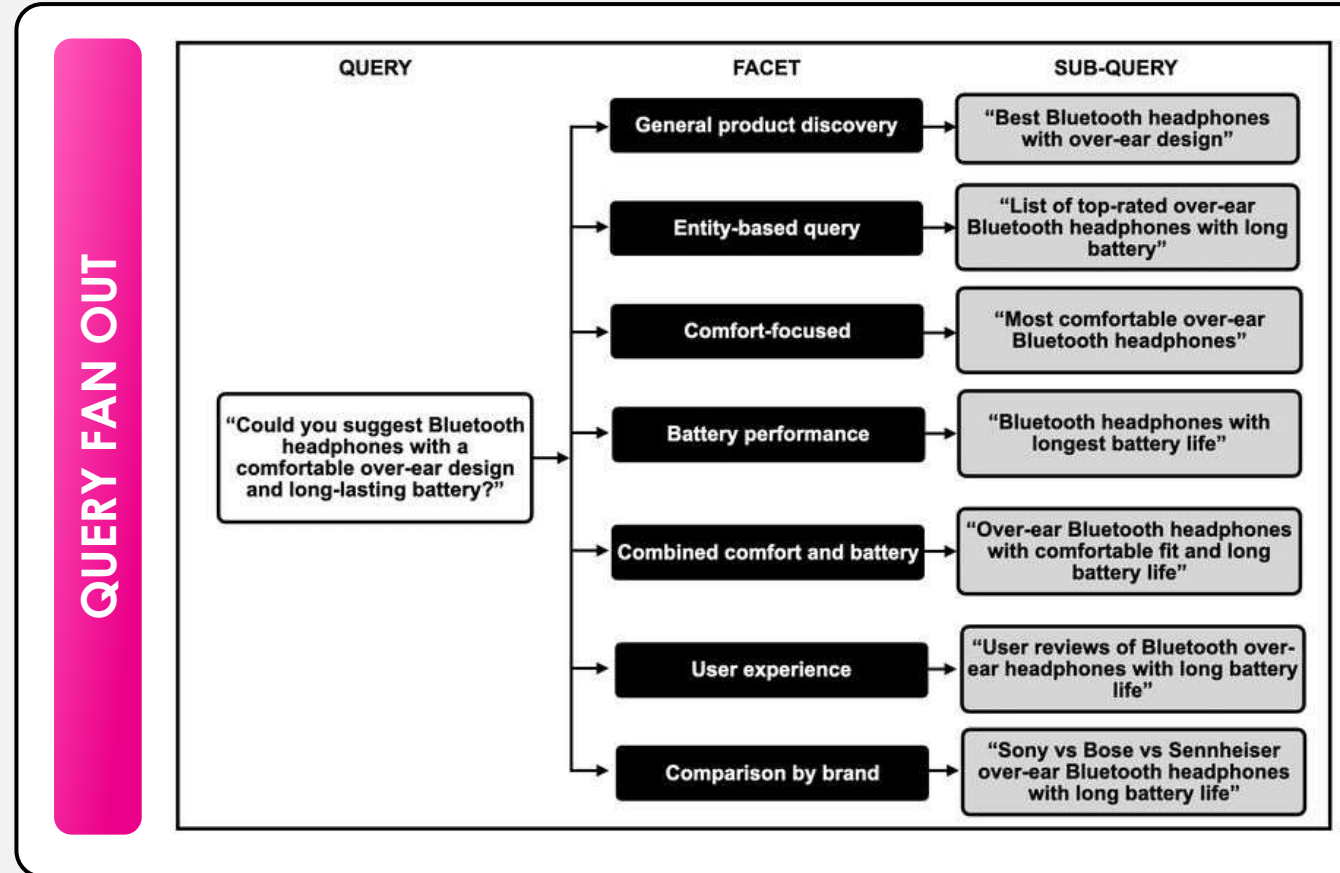
Social Media & UGC
YouTube, TikTok, Instagram

Discussion & Forums
Reddit, Quora

HOW AI SEARCH WORKS

Google's AI Mode operates in several sophisticated layers:

- **User Embedding Layer:** Converts your behavior and search history into vectors (think: memory).
- **Query Fan-Out:** A single query is expanded into dozens of related or synthetic ones to widen the info net.
- **Custom Corpus:** A tailored slice of Google's index is built for *that query* and *that user* in real time.
- **Specialized LLMs:** Google applies different language models based on query type (e.g., shopping, travel, how-to).
- **Reasoning Chains:** The models build logic-driven steps between data sources and the answer.



Measuring LLM Visibility

1. Referral & Direct Traffic Analysis (GA)

Monitor changes in traffic patterns, sources, and entry pages within Google Analytics data

2. Dedicated Monitoring Tools (i.e. ChatTrak, Otterly)

Track frequency and context of brand mentions in AI-generated content and responses



As AI reshapes search, traditional metrics are soon to evolve →

1

From Rankings to Visibility

2

From Clicks to Brand Mentions

3

From Impressions to Citations

4

From Conversions to Revenue Contribution

STELLA
RISING