Mount AI, Fan-out research, Gemini vs OpenAI, Profound $96M Series C | #MonthlyLandwehr

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Show notes

Claude Cowork is replacing agencies. A Mac Mini is the new must-have for AI enthusiasts. And Bing just gave marketers something Google still hasn't. A lot has happened in the last weeks, so it’s time for a new episode of #MonthlyLandwehr.

Malte is CPO & CMO at Peec AI, one of the leading AI search analytics platforms, and one of the brightest minds in the field. So I want to take all the news, new research and interesting developments and get his perspective on them.

What we covered in this episode

- Why one-click AI content is creating "Mount AI", and why the crash is inevitable
- Bing's new fan-out query data in Webmaster Tools: exciting or overhyped?
- Why Perplexity is being left behind and how Gemini is catching up to ChatGPT
- The hidden insight about English fan-out queries and what it means for non-English markets
- Profound's $96M Series C at unicorn valuation and why the math only works if they're replacing agencies

Let's connect! Niklas on LinkedIn: https://www.linkedin.com/in/niklas-buschner/ Radyant on LinkedIn: https://www.linkedin.com/company/radyant/ Malte on LinkedIn: https://www.linkedin.com/in/landwehr/ Peec AI on LinkedIn: https://www.linkedin.com/company/peec-ai/

Full conversation

[00:00:00] So you're saying one click AI generated content is not the loophole that a lot of people thought it was. It can work short term, crazily good? It's not a good long-term strategy. This is last time we will talk about perplexity in this format here But basically The winner. You said Grog but probably also Gemini right I think the question even if Gemini gonna take the spot off OpenAI Now thats what i call a rabbit hole that we just went into. Sorry about that, no love it! That's why we do this format. Before we dive in you're listening to the Masters of Search podcast with me your host Niklas Buschner. each week I sit down With some of these smartest people around the world and SEO & AI search To bring you their strategies mental models And top pieces of actionable advice.

[00:00:52] if You enjoy this podcast Don't forget to like and subscribe, and follow it in your favorite podcasting app or YouTube. It helps us get top-notch guests and create the best possible content for you! Let's dive into todays episode. Claude Cowork is replacing agencies. A Mac Mini Is The New Must Have For AI Enthusiasts And Bing Just Gave Marketers Something Google Still Hasn't. A lot has

happened over the last few weeks so its time a new episode of Monthly Landwehr. My guest again is Malte Landwehr, CPO and CMO at peak AI one of the leading A.I search analytics platforms. Malta's one of brightest minds in the field. so I want to take all news new research interesting developments get his perspective on them.

[00:01:39] Good to have you on again Malta. Happy to be here Nice. What was your highlight for last four weeks? My what? Your highlight! The thing that excited you most A couple of ex and LinkedIn posts from Lily Ray and Glenn Gabe talking about AI content generation at scale, where they said a lot things that I have also sat before or thought before. And shared them with...I think twenty examples of SEOs or GEOs who thought that they click button in the tool then publish all their contents. it works And I think it was Galen who coined this term of Mount AI, where your visibility increases and then decreases. It looks like a mountain! Of course once that happens... Once you don't rank anymore in Google You are also not showing up into the grounding process for any LLM based answer engine.

[00:02:43] More examples have been shared People becoming more aware. That's my highlight. Also lots people wrote on X Like hey i've used certain tool, I'm not naming them here. And my visibility tanked and then they also showed their internal like the Google search console screenshots.". Then other people replied,"Hey! I used same tools!". The same thing happened to me. so i really hope that now wake up a little bit see some of these shortcuts are only temporary measures". Okay you're saying one click AI generated content is the loophole that a lot of people thought it was. It can work short term, crazily good? It's not a good long-term strategy. yeah and of course a lot other things happened but one is my personal highlight.

[00:03:33] Okay do you remember the SEO heist from Jake Ward? Yeah I mean he was on his first ones to this right like create some content at scale on paper, potentially good quality if you do a checklist. But actually adds nothing to the internet has zero information gain contribution and that's exactly kind of content Google doesn't need. Google does not want indexed And If it is not in search engines It will end up with LLMs. So he was like first one who very publicly did this I believe just recently talked to Steve Toth from Notebook Agency. He also runs the SEO notebook newsletter and the AI notebook newsletter, And I also talked with him about the SEO heist... ...and he said that Google wanted an example when they basically completely de-indexed the causal app website which was where Jake Ward put on all of his content.

[00:04:38] Finally, he added as you've already said yourself If you look at the content from a checklist perspective, it was okay. But actually the Excel formulas etc. they didn't really work. so It looks like content but the whole depth is completely missing. So yeah I don't know. hopefully people will take this as a wake-up call not to engage in these short term measures. Something we talked about last time was a perplexity basically being left behind. How do you think, did your prediction there? Did it age well? Yes! I mean just today when i scrolled through my x-feet and said post from someone hey remember perplexety what happened to them? And also im preparing for couple of conferences right now. so i looked at market share data.

[00:05:34] Perplexity is the biggest loser among the big search engines and big LLMs. And just in October, they were bigger than GROC... ...and now GROK is fifty percent bigger than Perplexity. also Claude who are I would say primarily used via API based on just website traffic. They're not bigger. then perplexity. so there really being left behind i don't understand why people even talk about them anymore. Okay, then one story. tell us still this. This was the nail in the coffin for perplexity. That's is the last time that we will talk about perplexities in this format here. But basically The winner you said Grog but probably also Gemini right taking the spot of Perplexity In some way. Yes Gemina I mean i think the question Is even if Gemini gonna take a spot of May I?

[00:06:30] Because if you look at just monthly active users, they are catching up like crazy. If you look the actual usage, chatGPT is still very far ahead more than twice the size of Gemini as we can estimate usage on the web. Of course, there's a lot of hidden Gemini usage directly in Google Sheets etc. But the same can be true for OpenAI via various APIs. so it is kind difficult to understand total market share. but as a consumer product they are catching up like crazy and the products really good. right now Gemini is at very good spot. I believe The UI, I believe is still significantly worse than the chat GPT. Maybe that's just because i'm so used to chat gpt but also heard and seen it from others like how you can manage your chats find chats etc.

[00:07:24] etc. Is all a bit less well rounded? I would say in Gemini Still But these are things where Google actually good at And they should be able easily catch up if they prioritize. I'm not sure if you can share something about it, but maybe just a tendency. What do you see people being most interested in? In terms of tracking for example like also on the peak AI platform? which models or like witch chatbots People want to track their visibility on? is perplexity there still super relevant Or has it also shifted towards Gemini For example? So we had perplexities as default selection when we started and that are of people one consistent Tracking to do year-over-year comparison, etc. So it's still very big for us.

[00:08:16] And then since there was a default selection There was nobody talking about. hey I want that right because you just got it. i believe That the demand from customers basically mirrors what we just talked About. so there is more interest in Gemini than there Was A Year ago? There Is A lot More Interest In Grog Than There Was A year Go. That is, I think the big shift. Nice! let's say target group specific models and tools. Yes, so companies that sell to large enterprises they want co-pilot which is why we added it. Nice. And the reason of course if you work in a very large enterprise Co-Pilot might be only LLM that have access too The only Llm that are allowed use. So your user make purchasing decisions To research software, to research agencies.

[00:09:37] So anybody selling to these large enterprises should care about co-pilot. In terms of a market share, I think copilot is actually smaller than perplexity. but copilot it's also very hard to measure in terms Microsoft, three sixty five co-pilot formerly known as Microsoft Office. Three sixty five formally known is Microsoft office. whenever they do a rebranding also copilot is suddenly available under different sub domain. so it's kind of difficult to keep track on where are all the places I can access copilot. but yeah in terms of total market share i think copilot still pretty Small. I know also almost nobody uses it like privately as a consumer LLM, but there are people who do. It Do you think they'd do this on purpose to make?

[00:10:34] Make it hard for people to assess the market share or is it just somewhere? no okay No They just don't care. and when there's redesign its brand driven And they want stuff under certain domain and if that is called being edge service dot office comm co-pilot.microsoft.com or copilot.office.com, or copilot.business.offices.com etc., like they don't care! They just do it and make my life more difficult when I try to measure the traffic and attribute it.". Okay please stop doing this Microsoft... Please don't cause a more headache for Malta. but speaking of Microsoft Copilot et cetera there was another thing that was i would say somehow big on LinkedIn and also like in the whole AI search space, considering Bing Webmaster tools.

[00:11:26] And something they introduced there. maybe you can enlighten people a little bit that haven't been aware of the announcement? Yeah so Bing launched a feature where You Can See URLs That Were Used For Grounding And You Can see Fanout Queries. I personally am not huge fan Of The Product for A Big Variety Of Reasons But it seems to be important a lot of SEOs. I'm a little bit shocked that many SEO's have just never looked at fanout queries on scale, like there was no need for Microsoft Bing. You could've any time look in the JSON files your browser is loading from JetGPT. There are

plugins and tools that extract these like PKI And they are the real fanart queries from JetGBT, which is actually relevant and interesting.

[00:12:22] Bing does not really communicate what they show in the Bing webmaster tools. My assumption it's Microsoft co-pilot Yahoo Scout Which an LLM chatbot that officially based on Bing for grounding There probably a couple of other official partners. There are maybe some queries from OpenAI in there if they're still using Bing, which I believe is unclear at the moment. Like what's clear as they use Google that has been proven again and then do also still use Bing? If you look at how the relationship between Microsoft and OpenAI has developed, I kind of doubt that they use an official API. I think if there were to us it would just do scraping like they did with Google And then Bing have no way knowing. these are ground data.

[00:13:20] These are fan out queries used for grounding. It's not a mechanic to report on them So i'd assume its just co-pilot. But this is problem because the data isn't known And anybody who ever really cared about Google Search Console data knows how much time you need to invest, To actually understand for example a difference between the URL and keyword level data. I have noticed that even super experienced SEOs often have no idea what their numbers mean because they don't think Two URLs from your website show up for the same search term. What shows what happens if the same URL shows up twice because it can be in different SERP elements. How is the ranking calculated? For certain carousels? There are many, many things where people are unaware of but they are looking at in Google Search Console.

[00:14:20] and this after People have written hundreds of blog articles, whole books about Google Search Console. And still the vast majority of SEOs can't properly explain data especially not what happens once you start filtering at Once happens when you started exporting to raw data and then putting it together again on your own. so I think It's interesting but Microsoft is doing there. I personally don't find it particularly actionable because i have had access to the TechGPT fanout queries for a while now. But, its definitely good that more people are getting educated and you can find out what URLs they use for grounding or You Can Understand What Fanout Queries Exists. Like This Is Good Education but in The End You Need Different Data Sources Better Data Sourses Than The Bing Webmaster Tools.

[00:15:13] Alright There's A Lot To Unwrap Here. So First Of All I can hundred percent confirm, i myself spent a lot of time understanding the different dimensions. I remember setting up looker studio dashboards and then thinking about what is the difference between the URL dimension? And the keyword level dimension with the data from Google search console. so let's assume that not everybody listening here has figured this out. So Can you explain very simply What Is The Difference Between These two types of data before we go into like the Bing topic again and the Fanout queries topic, because there is a lot more obviously here to dig deeper in too. Yeah so most important thing I believe that URL level data is normalized per url search by impression meaning if you sum up all your URLs will count certain searches twice.

[00:16:15] Then with site links, for example you might actually be counting the same search eight times. But then on the other hand the URL level data is complete like You should have every single impression of your website in the url-level Data while The keyword level data it's not complete. some people call It sampled. I believe sampled Is wrong because? Its Not sampling It is not a hundred percent Document or its Actually not documented at all. what is happening? Based on some things that Google employees have said to some of their business partners, etc. It looks like there's a minimum threshold. How often the keyword has to be searched per month until it is reported? And when I was at Idealo, we even had cases where on one day supposedly... ...we didn't have any impressions for the keyword iPhone XI.

[00:17:22] Maybe that happened? We maybe did not rank all day but should've seen it in a traffic

pattern. so its very likely. there's an issue with Google site Where they classified iPhone XV as a key word where people were not seeing data and Google search console which is ridiculous. There are potentially also keywords with higher search volume where something looks like a credit card number or password, but Google might also decide not to show it. And then of course some people might say maybe it's not all about privacy? Maybe also Google wants to take away data from people. so maybe they just have rules that I very likely do not show certain key words. and Then there things. You have a slider on position one that has, I don't know five elements.

[00:18:09] All of these are position one. all of them accounted as position One and This is especially annoying if you're in the European Union And your in one of this DMA compliance mechanisms. So for example above Google Maps use sometimes have these little bubbles Of like Facebook idealo. those also counted as position one impressions. They have a click-through rate of zero point zero, zero one percent or something like that. But they mess up your position One CTR if you start filtering. Or then when you have the sidebar on desktop You actually first count left side bar and right side bar. So If we have link in the knowledge graph. That can be like position sixteen On the First page. It also really messed up your reporting Just for the data foundation.

[00:19:03] And then when you start filtering, I mean just to simple filters like all keywords with your brand name and all key words without your brand names those might not even add up to a hundred percent. Then you can export that data or call it via API but in the API there are empty entries And sometimes you have a whole page of empty entries. and then on pagination, fifty three. There's another little bit of data coming. You need to find that out or you can do lots of searches in filtering On the API to get more data. In the end The only thing it really works is doing the export To. I just forgot the name Of Google database That has access to BigQuery Exactly where you can export It there and then can analyze it.

[00:19:53] Or there's also the option to get that data directly into Luka Studio, but actually breaks for large websites because very large website has a hard limit And takes key words by number of clicks or number impressions. So you only got your high traffic keywords But is nowhere documented until you run analysis and realize wait a minute. why my average clicks rate so good, why is every keyword a high traffic keyword? So there are a lot of things very difficult about Google Search Console data. And I would always do the export and then do the analysis in BigQuery at least for a large website. when it was an idealo whenever we saw team members screen sharing or making a screenshot where they have applied filter into web interface It was like almost a meme of somebody in team speaking up.

[00:20:48] Just the reminder, whatever you are looking there it's kind-of random and we can't actually make any interpretation out of that. And its true for large websites. You need to BigQuery export then analyze data now. Now thats what I call a rabbit hole That just went into. Sorry about that. Love it love it love i love it. Thats why do this format. But still Even though probably a lot of people should spend more time in Google Search Console, why do you think that people are so excited about the Bing Webmaster Tools new feature and data popping up? Because it has not been accessible for them previously. Not everybody had access to fan-out queries from TechGPT. I mean they could but never bothered or were given tools.

[00:21:39] And now you see fanout queries for the first time, and hey of course that's exciting. I would be excited as well. or they have never looked at which of my URLs are actually being used for grounding Which could to a certain degree estimate based on your log file analysis. Or look in sources in chat GPT. If you have never done that again, seeing these are URLs and they're really used for grounding like this is the truth. This actually happened being says so I think there's exciting And it's very easy to trust a data if You've Never looked at any GEO AEO AI search tools. of course getting The Data

from a trusted source like Bing Is Easy Like you know. It's correct. i mean You actually don't know what it is, so its very easy to say that's correct.

[00:22:25] But if you do not care deeply about how data is defined where it comes from and then it will be easier for you to trust Bing just like the Google Search Console. Do you think Google will follow? I think Google has a lot of incentives in doing this. regulatory compliance and lobbying team at Google to decide, do we need to offer this? To make some stakeholders happy. Based on the current US government I don't think it is needed because right now being a Google is protected from The European Union. It's not possible for The European union level any fines against Google At least not realistically. But in the future, this might change of course. Okay let's dive a little bit deeper into fan out queries because you already mentioned it and I saw that You did some very interesting research on them.

[00:23:33] That is i would say particularly relevant at least as my interpretation for non-English markets. So what Did you find there? Yeah so It wasn't me finding This. all Of these research at pkii Is done by Tom and Tomek two of My team members And in this case, what we found out is that when you write a prompt with the German IP address very likely one of your fan-out queries will be in English. It's usually the second Fan-Out query and they also pull in English speaking websites as sources. We tested it for different languages between sixty percent to ninety percent or at least one of the Fanout queries is in English, when the prompt itself was not English. From anecdotal evidence I think for the e-commerce Fanout Queries this value might be even higher.

[00:24:32] but it's only anecdotal evidences that haven't analyzed yet. and yeah... This interesting right? Because It means if you are a German speaking brand That only sells to German speaking people in Germany. Whatever written about your on the English Speaking Internet Is relevant. And first of all, let's talk about maybe also why it happens to you. Honest answers we don't know. one hypothesis is there is just more English speaking content on the Internet and It makes sense to do it? I think for many topics that actually true. if i ask in German... ...I Don't Know What's The Capital Of United Kingdom? How Tall Is The Eiffel Tower? These Are Things Where This Information Is More Often Available In English Than In German.

[00:25:18] Another hypothesis is that English as a very token efficient language. So if you express something in English, it's generally a lot shorter than the same thing expressed in German or Turkish or Thai and many other languages. And this also translates to a lot of token efficiency primarily on English speaking content by English-speaking data scientists. So even if you prompt in German, sometimes all the reasoning is happening in English. By the way with Chinese models it also happens that they start reasoning in Chinese when your ask questions and then its weird because you look at them but don't know what's going on anymore. so it's unclear whether intentional or a side effect of something. But It Is Happening And What Does It Mean For Me As A Brand?

[00:26:10] I should not be surprised if i see English-speaking sources and... ...I need to be aware that whatever is written there about me, it's relevant. And! It gives a huge advantage for brands coming from English speaking countries or internationalizing because like imagine you have big footprint in the US.. ..and come to Germany You usually have zero footprint. but now on LLMs If one fan-out query is English, you have a huge advantage actually because for let's say one third of the fan out queries or twenty five percent or whatever. You are already there because they all really have to English speaking content and your dominating. so I think it's huge advantages especially for US companies uh... Because when we see English speaking internet It's the U S in US centric Internet at least It's a huge advantage for them.

[00:27:08] Huge problem for pure local players, like somebody like Audi will not suffer because they also have English-speaking content about Audi already. but a pure local brand that is competing with

international brands has a disadvantage Because they don't show up in the English fanart queries most likely. Would you recommend a pure local player that has only published content in German now to maybe look at the most important pages? Whatever this means, like let's say rankings. Let's say traffic, let's see conversion impact whatever we might find meaningful and then creating basically English versions of those just to make sure You get better coverage also by these English Fenerquers. I would not Check what are my most converting etc.

[00:28:06] pages. I would check What kind of pages are being cited in the prompts that i care about so? We actually did another analysis on this and it will publish soon. If you have an informational prompt or a commercial prompt, then is not yet transactional Then It's very unlikely That a product page Will be cited. So even though you make all your conversions on a product page, You really don't need to translate it To influence these kinds of prompts. I would go the other way See what kind of content is being cited And see should i create something similar to that? I can recommend this because i would have to test it a couple of times, but actually give good recommendation. But if was an in-house SEO right now tasked with AI visibility and the scenario you described... ...I'd probably run a test about whether or not does content need to live on my own website?

[00:29:12] def.to, or can I just make a profile on the couple of websites? Like there are many potential scenarios Maybe something i can add here Just from my very anecdotal experiment we did with the client. We had German content around Let's say mobile device management onboarding automation solutions and we had to. so we didn't do it On purpose too Do some like GEO experiment but we had To create a german and an english version. Interestingly, we also tracked it with PKI for some prompts. Actually the German version and the English version was cited so basically had double citations. I did a post on LinkedIn. i think people said do you really feel like this is something that's sustainable? I'm not sure. but found interesting to see happen because obviously immediately as SEOs always do thought about how to exploit Let's keep the users in mind.

[00:30:11] So is it valuable for the users? Because we have English speaking target customers and German-speaking target customers, then I would say yes makes sense from a user perspective but if you just do probably to like trick the Fanout queries not good idea. Yeah i think there are some things that you can technically do to trick the fan out queries. Like. I've done this in SEO alot. Just an important thing Is That From The Outside It Not Clear. You Do That Like without naming now and for my employer at the company where I once worked. I was running a lot of SEO projects Where then also people from the outside told me hey, are you doing this for SEO? And i was like...I have not really heard about that project!

[00:30:57] I think our sales team is doing it or something from social media team Or content team in reality pure SEO project. Just so well hidden that even, even SEOs from the outside were like thinking I'm not sure it's an SEO thing. they are doing there maybe. So I think it's totally fine to create pages just to influence the fan out queries. Just, It has to look like that is not a case and even when someone looks very deeply at cannot look like That Like A Very Experienced SEO. they can have doubt in their head. but if you Look At It Niklas And You Know Its An SEO Thing Then its Not Good Enough! It Has To Be so good that your asking yourself this could be done for SEO But Im Not Entirely Sure. For example, if the Excel formats that are shown there aren't working then it's not good enough.

[00:31:50] It has to be really top notch perfect. So If its an English speaking website maybe also put a video interview with CEO in english That even if Google quality rate goes on the web site. They should be like convinced. Yeah, this is a legitimate English speaking version of their website. when your competitor looks at it they Should not be like. I will report us to Google at spam? They should Be Like. why do we have an english-speaking Version? When a journalist who hates you Looks At the Website

they should Not be able To find anything sketchy about that. That Is how good You Have to hide Your SEO Measures in my Opinion on very Very Large websites where most Of My SEO Experiences. But I wouldn't say you can do it just to influence.

[00:32:35] Like, Just Do It! i've done so many things around cloaking adding content hiding content that in the end did just for SEO. That sometimes also turned out influencing conversion rate and stuff like that. but yeah...I think its sometimes okay to do thing's just for seo. they cant be negative from this experience And people form outside cannot notice. Okay, if at some point you will write your memoirs or like your biography I would suggest maybe life of an SEO Just may be an idea for the title. I hope that You Will Share Some Of The Behind-the-scenes From These Experiments That You Did Because At Least For Me You Created An Insane FOMO. Now To Learn More About This. As long as any of my customers or former employers exist, I will take these secrets with me.

[00:33:38] If some companies cease to do exist at some point maybe i can talk about things but... ...I will never write my memoirs! Never ever. there's no scenario where I would do that. Okay now insane bridge Maybe you should let Claude co-work or open claw write your memoirs. I want to have a little clap clap Sound effect now introduced here. No, just kidding in the last two weeks Or lasts. no i think it's not too weeks. like In The Last. I would say four to six Week at least for Not the AI Nerd on X? I Think most of the listeners Here are not On x all the Time. there Are Two new Kids on the Block. one is Claude core work and One Is Open Claw. Have you tried both yet? I have not. I wish, like...I had this itching in my fingers to buy another MacBook and create a new virtual credit card And just install OpenClaw and give access to the credit cards.

[00:34:44] I currently work seventy hours a week on pgai and i have zero time for distractions. So no, im not working on them. Um...I've some co-workers looking into both. um at some point somebody will sit me down and tell me malte.. I know you're almost forty now but you need to change how your work. give me quick introduction But right now just lack the time unfortunately. And do you use something else like, well not cloud co-work but then maybe Gemini or OpenAI whatever for your own daily AI companion? Or AI driver. Yes my main tool is JCPT just because it works well with private and business use cases. I have more business use case that i move to Gemini Because sometimes its better... ...and I use Manos a lot.

[00:35:38] This month alone, I upgraded my Manos account five times because it's really powerful for complex multi-step tasks. Okay can you share one example of people to have a better visual imagination? I mean very complex research where you need to sift through, I don't know five hundred documents and only the first five documents will then tell you what are next. This is something we're already Gemini so much better than OpenAI deep research. but then Something else for Manus. if You Don't Have The Biggest Subscription To Similar Web Then the Manus skill for similar web actually gives you access to a lot of similar Web data. So, you can give us one hundred domains and say... Give me traffic that these websites had in Germany last month or just conduct very deep research And then prepare text or briefing Or something like this For example.

[00:36:46] if I hadn't forgotten about it i would have given Manus the task To create a Briefing for This Episode. I did it last time, i forgot to do that today. Yeah no worries this is why im here doing the heavy lifting. and again a reminder for everybody from last episode if you have positive feedback please send them to malte. so Malte keeps being super happy and super engaged into a quick favorite. you can do me. Now let's talk about something that has been announced very, very recently on the day we are recording this year which is huge funding round for I would say a competitor or maybe just tool operates in similar space as PKI which was profound. they announce a ninety six million dollar series C at unicorn valuation.

[00:37:52] Do you have thoughts on that? Oh, of course I've thought about it. The question is what are my thoughts so i can mention publicly... I always like to take your questions and turn them into an even better one! They were the first competitors who started. So they have a head start, whereas everyone else in the space. And there has been very aggressive in terms of their evaluation and raising money. If you logically think about it building an AI visibility and optimization tool cannot be enough to justify that valuation. like nobody invests at one billion evaluation because the value climbs to two billion, right? That's not how venture scale investing works. And this was a VC—this wasn't like private equity buyout or something.

[00:38:54] who might be happy with the two Xs. So if you look at then what they also announced which is their... What are called agents? Which for me as workflow builder Like NADN in more expensive version The only reason they can justify that valuation is if either replace marketing employees or replace agencies, automate significant parts of the marketing stack. I'm not saying they are doing this like. i have no knowledge about it. But the only thing that logically makes sense to me is, their story actually a lot more than AI search. And I think they will become less of competitor because it... At that evaluation probably not even Samrush as relevant competitor anymore for them. They need to take on Salesforce Marketing Cloud Adobe These kinds players.

[00:40:03] Otherwise, the evaluation and amount of money they raised makes no sense to me. They have more open profound has more open jobs right now than we have total employees And I believe We are also based on team size The second largest in this space. Their marketing team is i think eight people that they communicated today. We built our product with less than eight people in the whole company, and that includes interns. When I signed there were less then eight people. when i joined they were eight nine people. so yeah very very... Just also if you compare it to current SEO companies Some of them are probably at a billion dollar evaluation if they were to be in the venture game or anybody would still invest into them.

[00:41:01] But, the only company that actually reached unicorn status as an SEO tool was SamRush and of course Ahrefs will be there If They Wear Aventure Funded Business And Probably Seven Eight. Nine Years ago BrightEdge Was There. I don't think Brightage is a unicorn nowadays because where's the growth? Um, i also didn't... Don't think any of the other players in this space are at Unicorn status. So um yeah it's crazy high evaluation but It shows how bullish people on the Space How much change People expect to happen In the organic marketing space. And do you thing? Because there was A comment on LinkedIn that I read today about the funding announcement, where someone said. So i'm quoting or paraphrasing. this will help create more trust in the whole AI search industry.

[00:42:06] do you also think? That is something we can see. a connection of. these big funding rounds creating more trust among enterprise buyers. yes Among very small companies, I'm not sure. Also, we don't know what Profound will do with that money. And without any judgment Profound is the only company I know That has repeatedly deleted The research they previously published from their own website. It's up to anybody To interpret What it means But its not something We have ever done. Its nothing i see Cystrix or Sam Russia atrifs doing but Profound With the multiple of their research articles after they have been cited by everyone on LinkedIn. I feel like The part you're stressing about the research. I also noticed that a couple of companies not naming any names, but definitely not pki and were On this one.

[00:43:31] i want to be very clear. They did Research But i feel Like it was just marketing narrative with a sprinkle of some data analysis and the sprinkle off, here in there. And it was just labeled as research to push narrative right? It's something that has become way more popular over the last years. Yes I'm also seeing it a lot especially from US based competitors hours doing sometimes an analysis on

something like ten thousand chats which is anecdotal evidence, I would say. Like you could have an intern label ten thousand chats like. it's not at any way deep relevant data and we usually try to run our analysis on significant larger amounts of data. but even then its always a challenge to normalize the data make sure that actually representative because we don't have prompt volume.

[00:44:33] A hundred percent representative user prompts, right? Like there are all these challenges in the GEO space and I think when you do research. You need to acknowledge that There are players who might decide to ignore it and just publish anyways And say this is how it is. Well, it has been insanely insightful again. Thanks so much for taking the time already very much looking forward to next episode. For people listening or watching, if you have any questions or anything please put it in the comments somewhere. No matter where YouTube your LinkedIn comments I think podcasting apps... You can't comment! If you have positive feedback send it to Malte. If you negative feedback Send It To Me. other than that Malte already very much looking forward to next one Likewise and you should probably tell People who Have Positive Feedback.

[00:45:27] So Give Your Rating on Spotify Or Something. Yeah, I added a prequel that will go before our talk where i have the call to action. God! And like...I'm in marketing for thirteen years and now can't come up with the word called action? I have a call-to-action too. Like subscribe leave a comment blah blah blah so but very kind of you two think about it. So yeah Thank You so much. Thanks, you. Bye-bye!