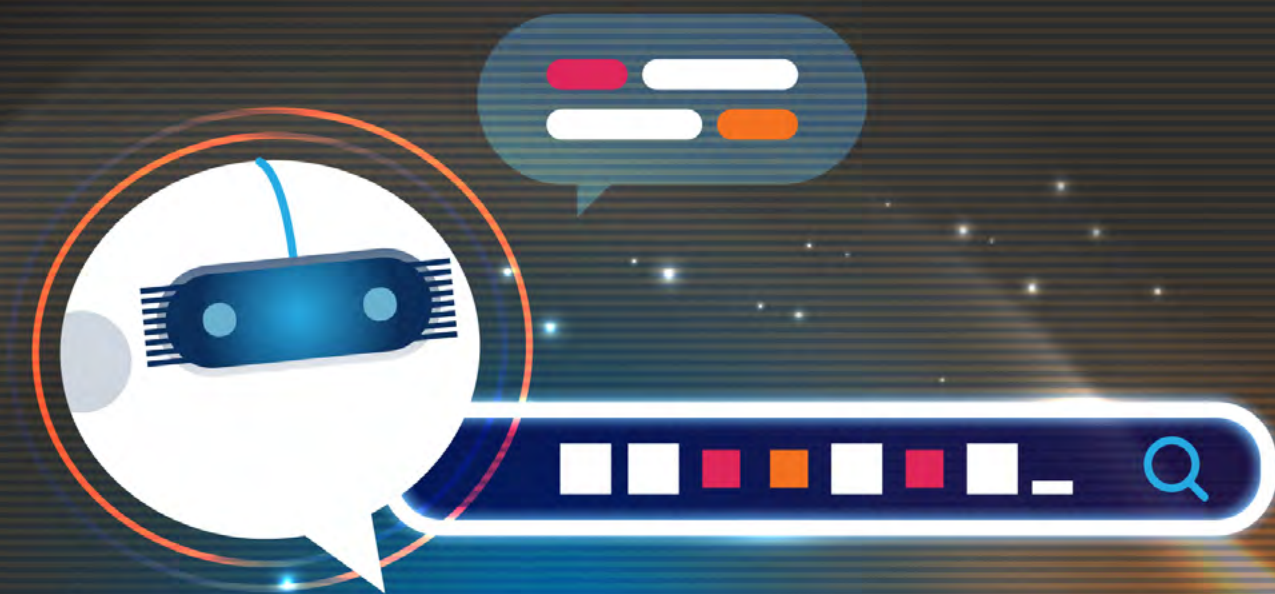


The New Rules of Visibility: How GTM Leaders are Adapting to AI Search

Kickstand x Pavilion
September 2025



EXECUTIVE SUMMARY

Objective:

AI search is changing the rules for brand visibility. SEO, PR, and content strategies need to adapt in order for brands to remain relevant and credible. To find out how marketing teams are addressing this shift, we interviewed 606 marketing leaders across North America and the United Kingdom.

Highlights:

- LLMs deliver context-rich answers that result in zero-click search. This means clicks to your website from search engines can no longer be your north star metric.
- Traditional SEO is no longer effective, but marketing leaders are still figuring out how AI impacts search. 20% of GTM leaders say they have no idea how to measure their brand's visibility in LLMs or AI platforms.
- GTM leaders are spreading their bets across more channels to influence buyers and AI algorithms.
- Organizations that embrace experimentation, rethink measurement, and act decisively will be best positioned to lead.

Impact:

- Find out how buyers are discovering brands in an AI-first environment so you can build visibility and credibility.
- See trends and attitudes among GTM teams in your industry compared to the market as a whole.
- Discover the channels and tactics you should test to show up in AI search and increase lead volume.
- Learn the metrics and dashboards you need to track as buyers shift to AI search.

INTRODUCTION

Forget page one of Google. Forget when keyword optimization alone could win visibility. In the age of AI, keywords still matter — but they're being weighed and surfaced in new contexts. And buyers receive search results in a different way, increasingly from large language models (LLMs) that deliver context-rich answers instead of a list of links. That means your brand either shows up in those responses... or it doesn't exist at all. For GTM leaders, the rules of visibility are being rewritten in real time, and most teams don't yet have a playbook.

AI-powered search is here, and it's transforming how companies are discovered and evaluated. But most marketing leaders are still scrambling to answer the most pressing questions:

How are buyers finding brands in this new environment?



Which strategies are actually working?



How can teams prove their impact when traditional metrics are fading fast?



This report explores what's working, what's not, and how GTM leaders are navigating one of the most disruptive shifts in marketing history.

SEARCH IS IN FLUX

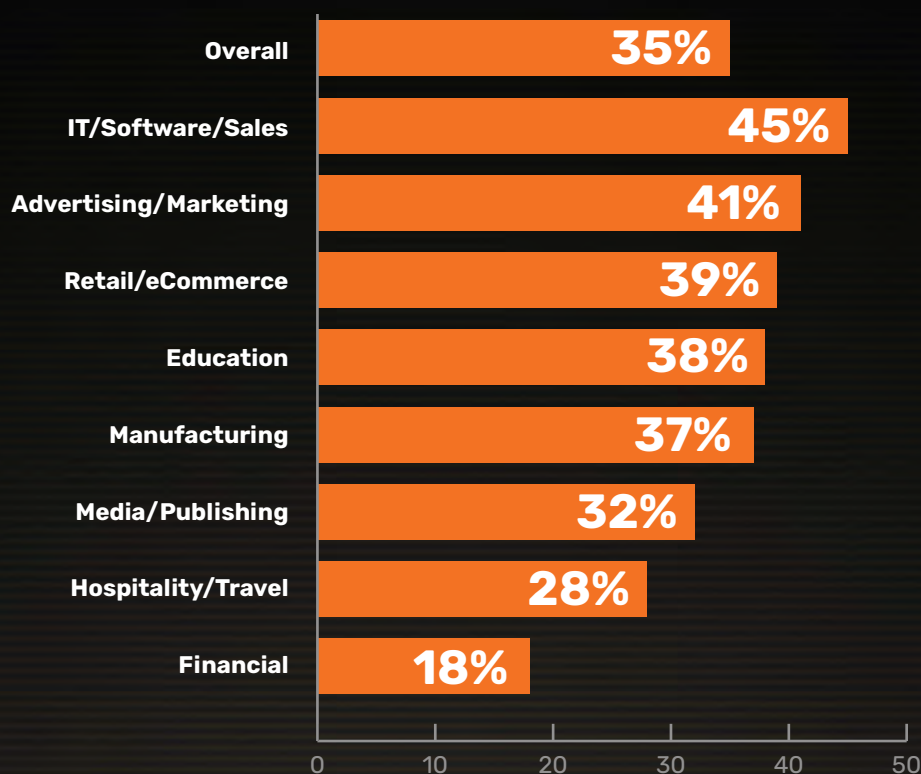
The C-suite has noticed the shift, and they want answers. Six in ten GTM leaders say at least one member of senior leadership has already asked about their brand's visibility in AI-generated answers. Most often it's the CEO (**24%**), CMO (**23%**), or even the board (**18%**) pressing for clarity.

The uncomfortable reality? Only one in three leaders (**31%**) say they have even a *mostly* clear internal narrative for how their org is adapting to AI search. **Fourteen percent** admit they have no shared narrative at all.

SEO's Waning Influence

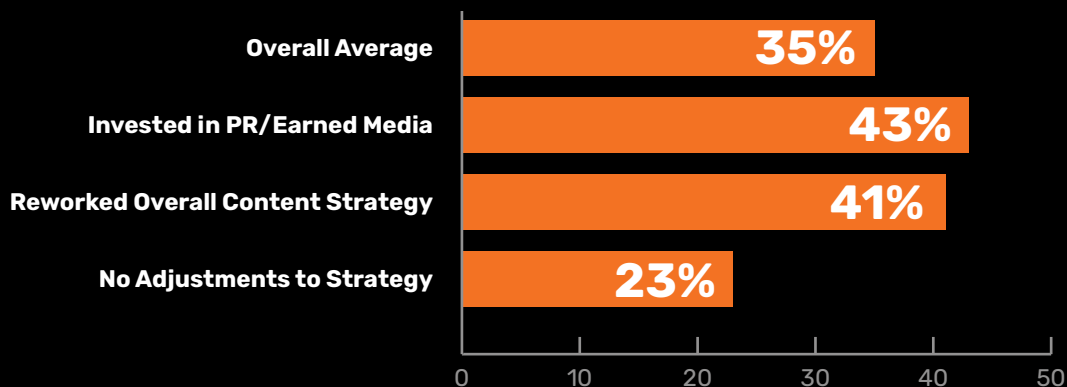
Traditional SEO — the lifeline of digital visibility for decades — is faltering. Over half of GTM leaders say their SEO strategy is only slightly effective (**51%**) or not effective at all (**7%**). In Financial Services, Banking, and Insurance, the problem is even worse, with leaders **133%** more likely than average to say SEO no longer delivers.

% Ranking SEO "Highly Effective" by Industry



And yet, PR is making a difference: companies that invested in earned media were **23%** more likely than average to report their SEO is still highly effective.

% Ranking SEO “Highly Effective” by Activity



Making It Up as They Go

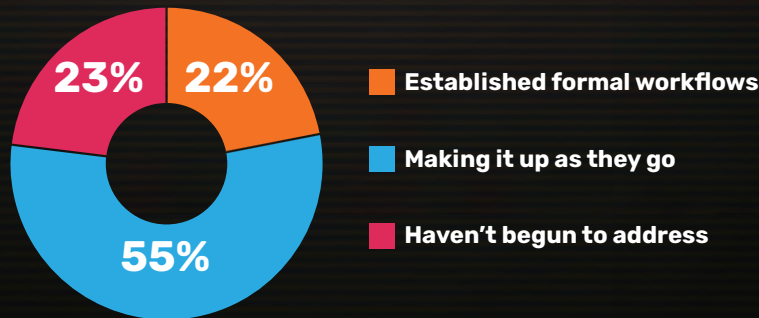
If there’s one consistent theme emerging, it’s experimentation without clarity. Most marketing leaders know they need to adapt, but what that actually looks like is far from settled. However, some teams are already taking action:

- **41%** have reworked content strategy for answer-oriented content.
- **32%** are running tests to optimize for LLM answer sets.
- **24%** are investing in PR to seed citations.
- **23%** are reallocating budgets.

But the majority are candid about the fact that they’re still feeling their way forward. More than half (**55%**) admit they’re “making it up as they go,” with only a small minority (**22%**) saying they’ve established formal workflows to address AI search in a systematic way. A quarter (**23%**) haven’t even begun.

This signals a wider truth: leaders aren't standing still, but they're far from confident that their current playbook will hold. The AI visibility shift is happening faster than most organizations can institutionalize best practices, creating a fragmented mix of trial-and-error efforts across the landscape.

Response to AI Search



Budget as a Barrier

Teams with annual marketing budgets under **\$500K** were **256%** more likely to say they haven't yet begun adapting to AI search.

The Manufacturing Outlier

One industry is leaning in harder than most: Manufacturing. Leaders here are significantly more likely to have clear narratives, documented workflows, and optimism about AI's future role. Compared to average, they are:

70%

more likely to have a fully clear, documented narrative around AI visibility.

84%

more likely to have formal workflows and processes in place.

40%

more likely to predict that within 24 months, LLMs will replace traditional search for key buyer queries.

39%

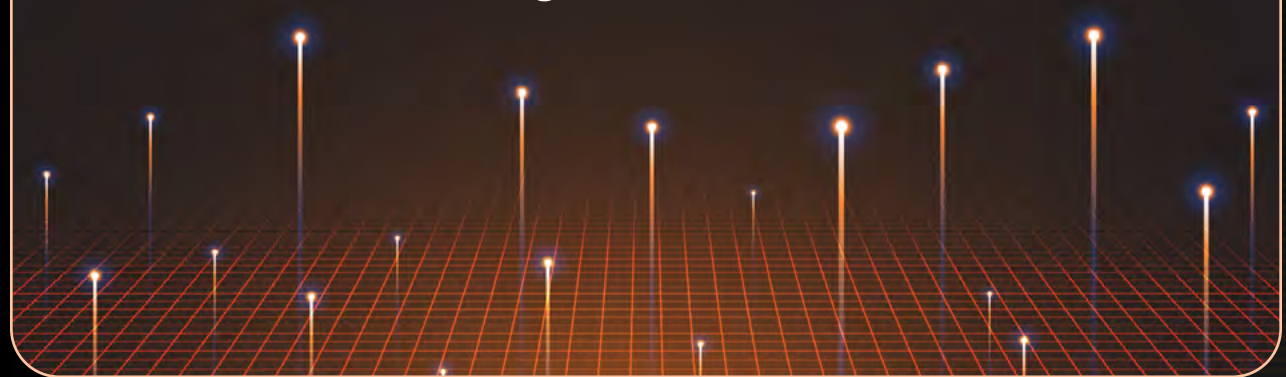
more likely to believe company websites themselves may become obsolete.

Early Impact on Leads

The impact of AI search visibility is no longer a hypothetical — it's already tied to revenue. Nearly half of GTM leaders (46%) say their company is seeing qualified leads that can be traced directly back to AI search. For a technology that only recently entered the mainstream, that's a pretty striking signal of how quickly buyer behavior is changing.

But not all organizations are benefiting equally: **those who had already invested in PR were 107% more likely than average to report meaningful lead volume**, underscoring the role of credible third-party validation in shaping LLM outputs. US-based companies were also more likely than their UK peers to see early traction, as were IT/SaaS leaders, midmarket firms, and companies with annual marketing budgets over \$500K.

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But early success doesn't mean broad readiness. While AI search is beginning to drive pipeline, nearly 4 in 10 GTM leaders (**39%**) admit they have no plan in place for navigating its external impact on brand visibility. The gap between companies already benefiting from AI search and those standing still is widening, and fast.

“AI search is evolving faster than the teams trying to harness it.”

—Molly George, CEO, Kickstand

GAPS ARE MULTIPLYING

If AI visibility is the new battleground, many teams are going into the fight underprepared.

Only **55%** of GTM leaders feel they have the internal knowledge to run an effective AI search program. Only slightly more (**59%**) believe they even have the right team. Expertise is in short supply: only **6%** consider themselves “experts” and another **29%** “very knowledgeable.” Nearly one in five admit their understanding is minimal — either basic awareness (**17%**) or none at all (**2%**).

The Gender Perception Gap

Women were twice as likely as men to say they had only basic awareness — or none at all — of AI search.

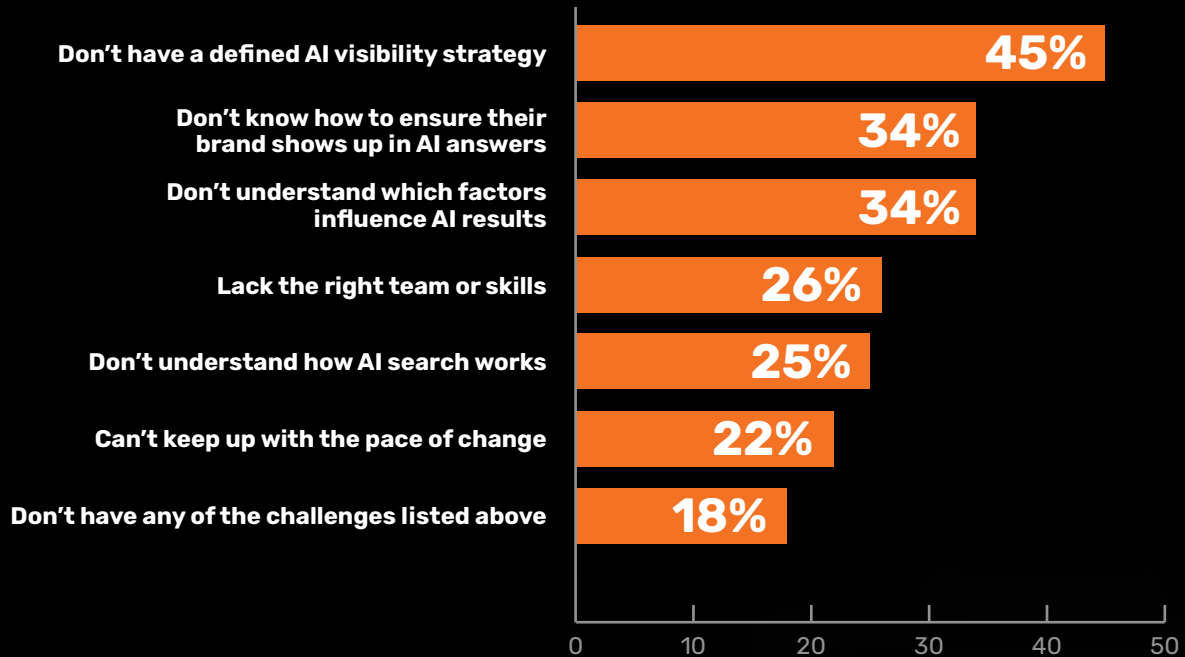
We can't assume this reflects actual capability, but it does highlight a dangerous perception gap. When women underestimate their expertise, they risk missing out on opportunities to lead in one of the fastest-moving areas of marketing. Closing that confidence gap will be just as important as closing the knowledge gap.



Strategic Blind Spots

These knowledge gaps cascade quickly into strategy. Only one in four leaders say their teams are clear on how AI-powered search platforms like ChatGPT or Perplexity select or rank content. Nearly half (**48%**) believe they're already falling behind competitors. The most common challenges include:

Most Common Challenges



The picture is clear: GTM leaders recognize the opportunity, but few feel fully equipped to act on it. Until knowledge and confidence levels rise, progress will remain inconsistent, with some teams moving quickly to build advantage while others struggle to find their footing.

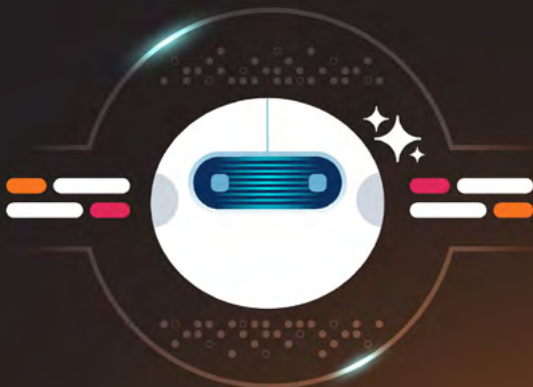
THE NEW RULES OF SUCCESS

Clicks are no longer the north star. Credibility is. For years, marketers measured success by how many people landed on their website. But in an AI-driven landscape, visibility is about more than traffic — it's about whether the algorithms recognize your brand as a trusted, authoritative source worth surfacing in the first place. AI search is training on signals of authority, reputation, and trust, and the shift is forcing GTM leaders to rethink how they build influence across the digital ecosystem. The brands that win won't be the ones that publish the most content, but the ones that can prove they're credible, consistent, and cited across the web.

Shifting Content Strategy

If credibility is the new currency of visibility, content is the vehicle for earning it. And most GTM leaders are already shifting how they approach it: nearly two-thirds (**65%**) say they are reworking their content strategy to better support AI search. Within that group, almost half (**48%**) are simply producing more content, while a slightly larger share (**57%**) are specifically optimizing content for AI platforms.

But not all tactics pay off equally. The data gives a view of what actually moves the needle when it comes to generating leads from AI visibility:



- Refreshing evergreen pieces with AI-friendly formatting (think structure, schema, and clarity) had the strongest impact. Leaders who took this approach were **114%** more likely than average to report a meaningful volume of qualified leads traceable to AI search.
- Optimizing content explicitly for AI answer sets came next, with these leaders **93%** more likely than average to see measurable results.
- Simply producing more content still helped, but was less efficient — those who leaned into volume were **79%** more likely than average to see meaningful lead flow.

The takeaway is clear: quality and structure matter more than sheer volume. Leaders who invest in refining existing assets for AI consumption, rather than just churning out new material, are already seeing higher returns.

Diversifying Channels

AI search doesn't just scrape your website — it pulls from the broader online knowledge landscape. To stay visible, GTM leaders are spreading their bets across more channels, ensuring their brand is referenced wherever buyers (and algorithms) might look.

Over half (**51%**) of leaders say they're actively diversifying their content channels. That doesn't just mean republishing blog posts in more places. It means leaning into new platforms, formats, and conversations:

- Two-way dialogue: **34%** are engaging in forums like Reddit, and B2B brands were **119%** more likely than B2C to take this approach.
- Social presence: **47%** are increasing focus on LinkedIn brand pages, while **30%** are investing in executive profiles.
- Community-driven platforms: **18%** are experimenting with Substack, **9%** with Quora, and **29%** with professional peer communities.
- Media formats: **69%** are increasing investment in video and **33%** in audio.

Credibility is central here. Over half (**54%**) of leaders prioritizing channel diversification say they're also increasing PR spend — earned mentions, analyst reports, awards, speaking opportunities — because those signals help train AI to trust and cite their brand.

Reviews are the New Battleground

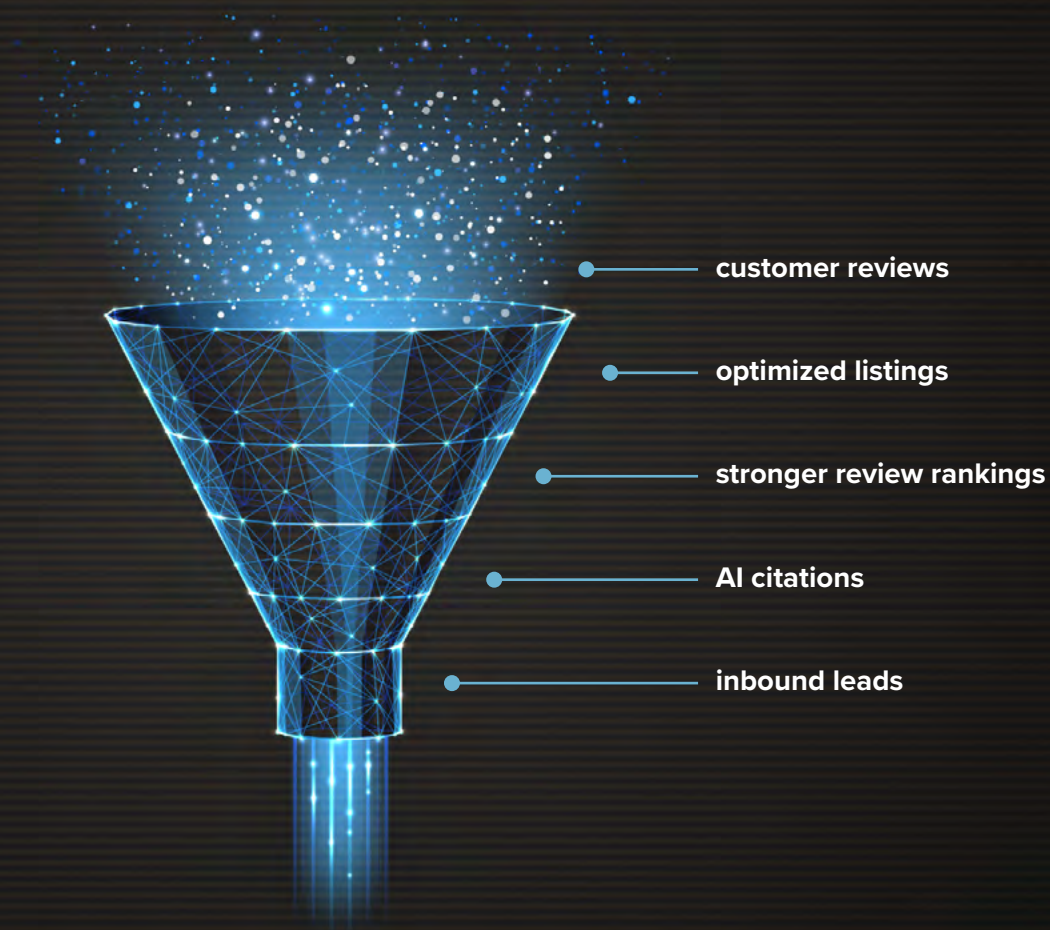
If content is one way to train AI, third-party validation is another. That's why review sites are emerging as a critical battleground for visibility. Nearly one in three leaders (29%) say they're increasing emphasis on platforms like G2 and Gartner, which show up prominently as cited sources across LLMs.

And it's paying off: those who prioritized review sites were **114%** more likely than average to report meaningful lead volume from AI search.

But success here requires more than just hoping for five-star reviews. Leaders making review sites a strategic priority have taken deliberate steps:

- **67%** increased efforts to collect customer reviews and testimonials.
- **65%** optimized product or company descriptions for review platforms.
- **54%** began monitoring competitors' performance more closely.
- **53%** invested in review management or analytics tools.
- **47%** increased budget for sponsored profiles or premium listings (with enterprise companies **71%** more likely than small businesses to do so).
- **33%** added review sites to executive reporting dashboards.
- **33%** engaged third-party services to improve rankings.

The takeaway? AI search engines don't just parse your website, they weigh your reputation as seen through your audience, including via review platforms. Ignoring them means forfeiting one of the fastest-growing signals shaping AI-driven buyer journeys.



Brand Takes Center Stage

For years, marketers have been stuck in a grind of short-termism. The “growth at all costs” mentality of the late 2010s gave way to budget cuts and boardroom demands for immediate ROI. As a result, many CMOs reported spending the bulk of their energy on demand, even while suspecting they should be investing more in brand. In fact, in a late 2024 Kickstand survey of CMOs, **72%** said more focus should be on brand, yet 59% admitted they were spending more time on short-term revenue — and two-thirds said that imbalance had only grown worse in the past year.¹

Against that backdrop, the rise of AI-powered search represents a striking reversal. Suddenly brand isn’t a “nice-to-have,” it’s the key to discoverability. Algorithms are weighing authority, credibility, and trust as core signals, which means brand presence directly determines whether a company shows up in the answers buyers see.

It’s no surprise, then, that **57%** of GTM leaders say they’re reevaluating their budget split between brand and demand. Of those, **two-thirds** are increasing the share going toward brand building this year compared to last. Only **5%** plan to reduce it. And the payoff is clear: leaders who upped their investment in brand were **71%** more likely to say they’re already seeing meaningful lead volume from AI search, and **46%** more likely to feel confident their company is moving fast enough to keep up.

The urgency is also shifting how teams approach brand positioning. More than half (**56%**) say it’s become more urgent in light of AI search, with B2B brands especially attuned — they were **86%** more likely than B2C to call it “significantly more urgent.” Nearly two-thirds (**63%**) are also adjusting messaging to reflect the kinds of language, themes, and formats that perform well in AI-generated responses.

The result? Brand is back in business — not as a long-term luxury, but as a prerequisite for showing up at all.

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THE MEASUREMENT PLAYBOOK IS FALLING APART

Marketers can't manage what they can't measure. And right now, measurement is broken. For decades, keyword rankings, search traffic, and click-through rates gave GTM leaders a clear sense of performance. But in a world dominated by AI-driven and zero-click search, those metrics are losing relevance fast.

Two-thirds (**67%**) of GTM leaders agree that traditional web analytics no longer tell the full story. Visibility increasingly happens in places that don't generate clicks, impressions, or sessions marketers can count in a dashboard.

The Disconnect

That shift is creating real pain points:

- **38%** have seen traffic decline even as brand impressions remain strong.
- **34%** cite zero-click mentions and/or difficulty proving ROI from non-click visibility as major obstacles.
- And nearly all (**92%**) say they're facing serious challenges measuring marketing performance right now.



The consequences ripple beyond the marketing team. **58%** of leaders report a growing disconnect between how executives measure marketing success and how visibility actually works today. It's not that the C-suite wants to see keyword rankings or organic traffic per se — what they want is proof that visibility is driving outcomes that matter: higher revenue, lower acquisition costs, and brand strength in the market. The problem is that in a zero-click environment, those ties can be harder to prove. Marketers are still being asked to show impact in terms of dollars and deals at the very moment when visibility is least trackable through traditional means.

New Metrics, New Dashboards

Some teams are moving quickly to update their playbooks. Half (**50%**) have already revised their performance dashboards to track not just site visits, but also:

- Frequency of brand mentions in AI results (**54%**)
- Accuracy of brand information in AI responses (**52%**)
- Inclusion in AI citations (**44%**)
- Volume of zero-click impressions where the brand appears but no traffic flows through (46%)

Still, progress is uneven. **44%** of GTM leaders admit they haven't found effective tools to support these new measurement realities, leaving their teams caught between outdated metrics and aspirational ones they can't yet track consistently.

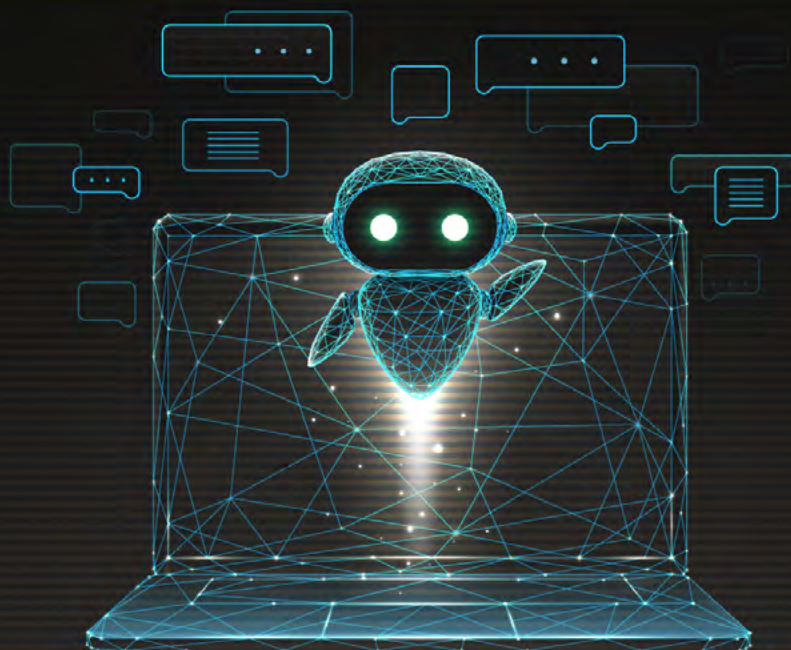
The Need for Support

When asked what would help most, leaders pointed not to quick fixes but to foundational support:

- **58%** want internal training or new tools
- **52%** want additional budget for external expertise
- **49%** want case studies of companies measuring AI visibility well
- **37%** want benchmarks from peers

In the current environment, it can be challenging for GTM leaders to prove the value of marketing, or to even know whether strategies are working at all. Without reliable metrics, teams risk either overinvesting in the wrong channels or underinvesting in the ones shaping tomorrow's visibility. In other words, the crisis is strategic rather than just technical.

Until new measurement frameworks and benchmarks emerge, leaders will need to balance experimentation with patience, building credibility internally while pushing their organizations to recognize that the rules have changed.



THE PATH FORWARD IS STILL TAKING SHAPE

The need for AI search visibility isn't a "what if" — it's a "what now." Nearly half of GTM leaders (**46%**) believe LLMs will replace traditional search for key buyer queries within two years, yet fewer than half (**49%**) feel confident their company is moving fast enough to adapt. The opportunity is massive, but so is the risk of falling behind.

And the expectations for what might change are even bolder: **35%** of leaders believe AI platforms may ultimately replace the need for standalone company websites altogether. Few other technology shifts have sparked such fundamental questions about the future of brand visibility.

The Weight of Uncertainty

Still, belief in the inevitability of change hasn't erased hesitation. **41%** of GTM leaders admit they feel paralyzed by the pace of change, reluctant to commit to strategies that might quickly become outdated.

Others see waiting as the bigger risk: **59%** argue that delaying action only increases disruption and makes it easier for competitors to surge ahead. That split highlights the tension shaping today's marketing landscape — leaders know the ground is shifting, but not everyone is ready to run.

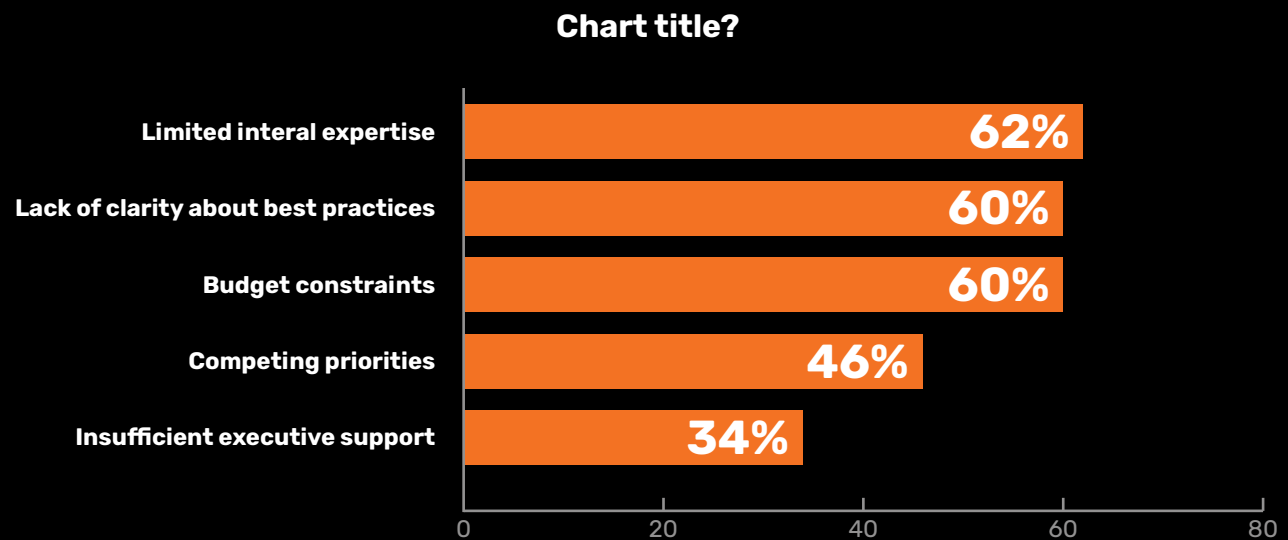
The PR Advantage

Those who invested in PR were **61%** more likely than average to say they feel confident their team is moving quickly enough to keep pace with AI search.



Barriers to Action

For the **51%** of leaders who don't feel confident their companies are moving fast enough, the roadblocks are more than a minor headache. Leaders point to a cluster of challenges that make it difficult to act decisively on AI visibility:



These concerns highlight the structural weaknesses slowing down adoption. Without the skills, guidance, or resources to move quickly, even leaders who see the urgency of AI visibility are stuck in a holding pattern.

But what paralyzes some energizes others. A growing segment of GTM leaders see the turbulence of AI search as their chance to leapfrog slower competitors: in fact, seven in ten GTM leaders see this transition as a rare opportunity to outpace legacy brands. By moving with urgency and intention — testing new strategies, adjusting channels, and investing in credibility — many companies hope to seize disproportionate visibility before the rules fully solidify.

CONCLUSION

GTM leaders are standing at the edge of a search revolution. AI is obviously not a passing trend; it is fundamentally reshaping how buyers discover, evaluate, and ultimately trust brands. While the path forward is still taking shape, one reality is already clear: standing still is not an option.

The organizations that will win in this new era are those willing to experiment boldly, rethink the metrics that define success, and act decisively even before all the answers are in. That doesn't mean chasing every shiny tool or abandoning proven tactics — it means combining creativity with discipline, pairing brand credibility with smart measurement, and building visibility strategies that work across both today's channels and tomorrow's. The companies that seize that opportunity will be the ones shaping the benchmarks everyone else is forced to follow.

LET'S TALK



ABOUT KICKSTAND

Kickstand is a global marketing agency specializing in support of high growth technology brands. Offering a data first approach to PR and services that include media and analyst relations, research, content, crisis communications, and influencer marketing, Kickstand helps build well-defended market leaders in some of today's most innovative industries including mobility, robotics, AI, cybersecurity, fintech, insurtech, supply chain and logistics, sales and marketing tech, and eCommerce. For more information about our approach and how we help brands scale and successfully exit, www.meetkickstand.com



ABOUT PAVILION

Pavilion was founded in 2016 as a support network for revenue leaders. Since then, it has grown into a 10,000+ member international community of go-to-market leaders. Through structured training in Pavilion University; private, moderated peer groups; and in-person events, Pavilion delivers on its mission to help revenue leaders unlock and achieve their full professional potential. For more information about Pavilion or to become a member, please visit www.joinpavilion.com



SURVEY METHODOLOGY

The New Rules of Visibility report was conducted between July 31st - August 13th, 2025. Kickstand surveyed a total of 606 full-time marketing employees across North America and the United Kingdom who hold a management title or higher. The study was conducted at 95% confidence with a +/- 4% margin of error.

Survey for Marketing Leaders

What country do you live in?

United States	54%
United Kingdom	46%
Neither of the Above	0%

Which of the following best describes the industry your company operates in?

Advertising / Marketing / PR	19%
Retail / E-commerce	12%
IT / Software / SaaS	8%
Healthcare / Medical / Life Sciences	7%
Education	6%
Manufacturing	6%
Financial Services / Banking / Insurance	5%
Hospitality / Travel / Leisure	5%
Real Estate / Construction	5%
Media / Publishing / Entertainment	5%
Professional Services / Consulting	4%
Nonprofit	4%
Government / Public Sector	4%
Logistics / Transportation / Supply Chain	3%
Automotive	1%
Consumer Packaged Goods (CPG)	1%
Energy / Utilities	1%
Legal Services	1%
Telecommunications	1%
Other	3%

What department do you primarily work in? Select the one that best describes your role.

Executive Leadership (e.g., CEO, Founder)	15%
Marketing	48%
Revenue Operations	3%
Product	3%
Sales	8%
Growth or Demand Generation	2%
Product Marketing	8%
Brand or Communications	7%
Other (please specify)	6%

What is the average contract value (ACV) of your company's product or service? Select the option that best reflects your typical deal size.

Less than \$5,000	17%
\$5,000–\$24,999	15%
\$25,000–\$99,999	15%
\$100,000–\$499,999	16%
\$500,000–\$999,999	8%
\$1 million or more	19%
Not sure	11%

What is the total number of employees in your organization?

1-99	47%
100-499	22%
500-999	9%
1,000-4,999	10%
5,000 or more	11%

Approximately how much does your organization allocate to marketing in a typical fiscal year?

Don't know / not sure	8%
Less than \$500 K	47%
\$500 K – <\$1 M	13%
\$1 M – <\$3 M	11%
\$3 M – <\$5 M	4%
\$5 M – <\$10 M	4%
\$10 M – <\$25 M	5%
\$25 M – <\$50 M	3%
\$50 M – <\$100 M	2%
\$100 M or more	2%