



**AI Search
and Discovery:
Enterprise
Benchmark
Report**

Introduction

Traditional search has been the foundation of digital acquisition for 25+ years. Organic search traffic, search engine optimization (SEO) best practices, and Google's dominance have shaped how businesses think about discovery, visibility, and customer acquisition.

But AI search and large language model (LLM) experiences are creating a new discovery paradigm. ChatGPT, Perplexity, Google's AI Overviews, and other AI platforms are changing how people find information and how brands get discovered. For the first time in decades, the rules of search are changing.

Enterprise marketers are caught between established practices and emerging channels. They know traditional SEO still drives results, but they also see AI search growing rapidly. The question isn't whether to adapt — it's how fast, how much to invest, and what to prioritize.

This survey captures where leaders stand at this inflection point. We surveyed 300 enterprise marketing, growth, and digital leaders across six industries to understand how they're navigating this shift. What we found reveals a market moving faster than expected, placing bigger bets than anticipated, and grappling with real measurement challenges beneath a surface of confidence.

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Key findings

/ 1 Enterprise leaders expect both traditional SEO and AI search to grow simultaneously

Leaders don't think AI search will replace SEO. Instead, they expect both channels to grow. By the end of 2026, 55% expect traditional SEO to drive over half their traffic (up from 38% in 2025), while 49% expect AI search to hit that same threshold (up from 26%).

/ 2 Marketers are bullish on AI search and betting big with their budgets

Marketers are making substantial investments: 65% are dedicating at least a quarter of their 2026 marketing budget to AI search optimization, and 28% are allocating over half. Financial services leads the charge, with 40% committing a majority of their budget to AI visibility.

/ 3 The vast majority believe their brand will sell inside AI platforms within 12 months

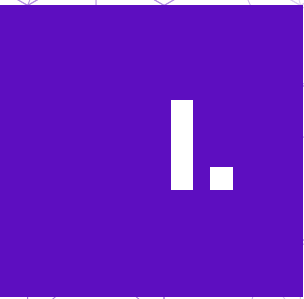
This isn't just discovery. Eighty-seven percent believe platforms like ChatGPT, Claude, and Perplexity will serve as transaction channels this year.

/ 4 False confidence alert? Most say they're confident measuring AI conversions but are struggling with the basics

While 66% report strong measurement confidence, almost half are struggling with technology fundamentals: 26% can't track the user journey from AI discovery to conversion, and 24% say their analytics tools aren't up to the task.

/ 5 Concern outweighs optimism for AI-driven discovery, with accuracy and data privacy worrying leaders most

When asked about their biggest concerns or opportunities regarding AI-driven discovery, leaders skewed cautious: 61% cited concerns, while 39% focused on upside. Accuracy and transparency (19%) and data privacy and security (19%) tied as the most common concerns.



Traditional search remains critical as AI search grows alongside it

For decades, the rules of search traffic were clear: Optimize for Google, track organic rankings, measure SEO performance. But 2025 changed the game. Enterprise leaders watched AI search traffic grow from a negligible sliver to a meaningful – and in some cases, majority – source of discovery. The question on everyone’s mind: Will AI search replace traditional search entirely?

The data says no. Both are growing.

Leaders project the percentage of website traffic from traditional SEO will grow from a calculated mean of 45% to 53% in 2026 – an 8 percentage point increase. At the same time, they expect the percentage of website traffic from AI search to grow even faster, jumping from 35% to 50%.¹

¹ Respondents answered two separate questions about SEO and AI search traffic without being asked to reconcile the totals. The fact that projections exceed 100% suggests leaders are estimating growth for each channel in isolation, rather than thinking about their total traffic pie.

FIGURE 1.

Portion of traffic from traditional SEO, 2025 actual vs. 2026 projected

2025 actual % vs. 2026 projected %

Percentage of website traffic from traditional SEO

“Not sure” responses: <1%

2025 mean: 45%
2026 mean: 53%

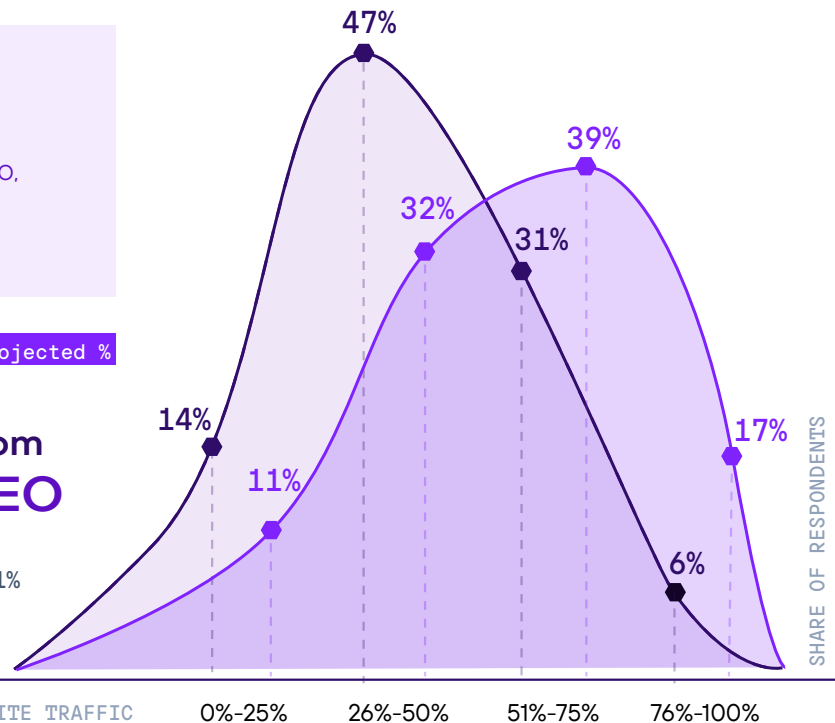


FIGURE 2.

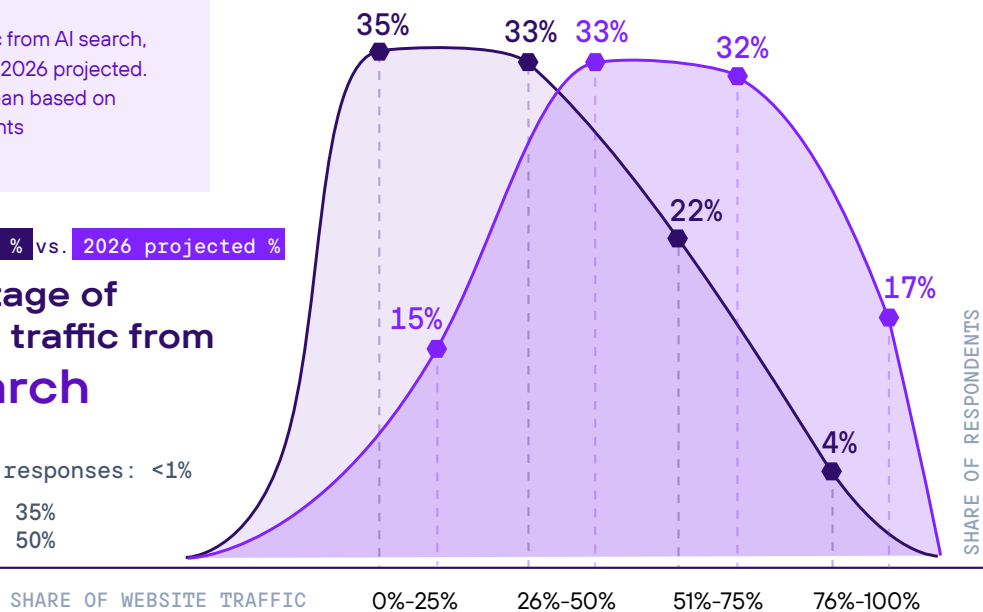
Portion of traffic from AI search, 2025 actual vs. 2026 projected.
*Calculated mean based on quartile midpoints

2025 actual % vs. 2026 projected %

Percentage of website traffic from AI search

"Not sure" responses: <1%

2025 mean: 35%
2026 mean: 50%



This shift is dramatic: Only 26% received over half their traffic from AI search in 2025, but by the end of 2026, 49% expect to hit that threshold. That's nearly doubling in one year.

These projections assume AI search will drive traffic the same way traditional search does, which is unlikely. As AI platforms deliver more complete answers directly in their interfaces, the relationship between discovery and website visits is changing. Leaders are managing both channels now, not choosing between them — and that means tracking more touchpoints, mapping more complex customer journeys, and solving attribution challenges that didn't exist a year ago.

Expert perspective

// AI influences more than it refers. Traditional search presents a page of links and required users to click, compare, and conduct their own research across multiple sites. AI changes that dynamic by synthesizing information and delivering a direct answer after doing that research on the user's behalf.



Jen Taylor
Director, AI Strategy &
Integration
Capacity Interactive

Discovery hasn't disappeared. It has shifted into AI interfaces. That will likely translate into fewer overall visits, not explosive traffic growth, but higher-intent ones because much of the evaluation has already happened before someone reaches your site. The strategic question is no longer just how you rank or how many visitors you drive. It is whether your brand is included in the synthesized answer shaping the decision."

// Brands need to stop equating visibility with traffic. The more relevant metrics are directional and influence-based: category visibility within AI responses, frequency and accuracy of brand mentions across models, branded search lift following AI exposure, conversion velocity for users who enter through AI-assisted journeys. Even qualitative signals gathered through first-party surveys asking customers how they discovered and evaluated the brand.

The brands that adapt will move from traffic-centric measurement to influence modeling. Not because traffic no longer matters, but because it is no longer the full story."



Shana Haynie
Head of Content and
Organic Growth
MoEngage



AI search is already delivering results, and the impact is cross-functional

In 2025, AI search moved from promising to proven. Eighty-nine percent of enterprise leaders say it improved their marketing performance – 35% saw significant improvement (performance increased by 10% or more), and 54% saw slight improvement (performance increased by less than 10%).

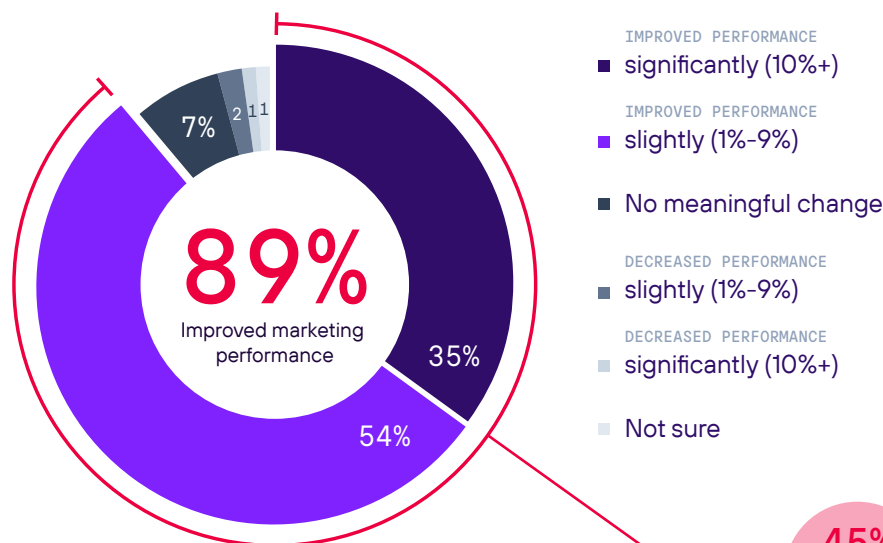


FIGURE 3.

Overall, how did AI-powered search/LLM platforms affect your marketing performance in 2025? (Consider metrics like traffic, conversions, leads, or revenue)

The impact isn't contained to SEO teams. While content/SEO teams feel it most (67%), five different marketing functions all report 45%+ impact: performance marketing (62%), product marketing (59%), customer relationship management (CRM)/lifecycle marketing (52%), and data/analytics (45%). When customers change how they discover brands, it touches every part of the marketing organization.

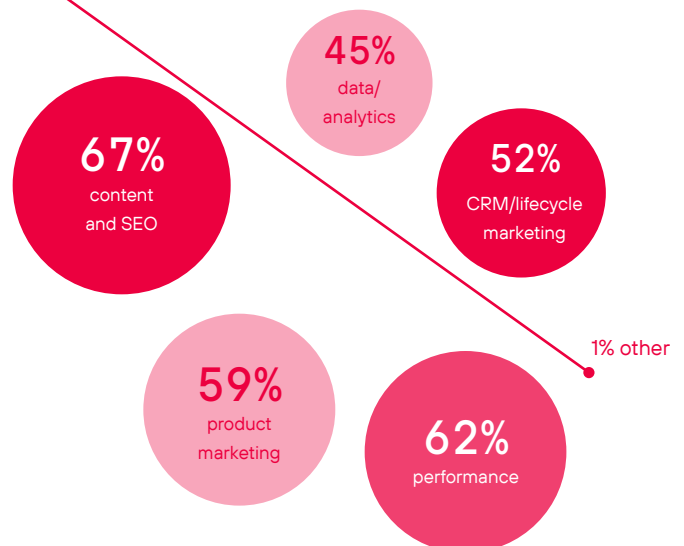


FIGURE 4.

Which areas of your marketing organization felt the most impact from AI-powered search/LLM platforms in 2025? (Select all that apply)

Expert perspective



It's surprising that only 3% of respondents are actually seeing negative marketing performance from AI given the widely reported decline in referral traffic across the open web. I'd expect more downstream impact. Instead, the data shows AI is already net-positive for marketers. This runs counter to the media narrative: A third of companies are seeing significant gains across the entire organization today."



Adam Landis

Head of Strategic Growth
Branch

III.

Marketing leaders are placing big bets on AI search with major budget shifts

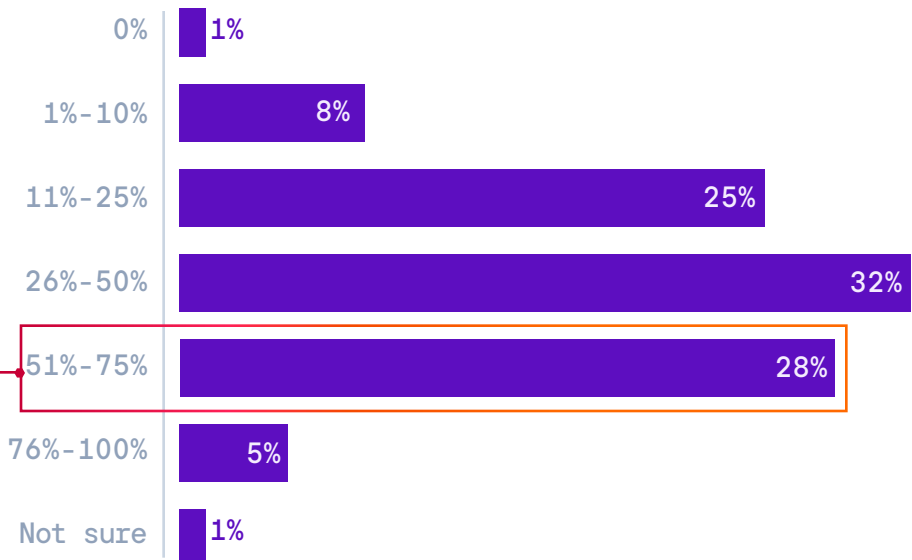
When a channel delivers results, budgets follow. Sixty-five percent of enterprise leaders are dedicating at least a quarter of their 2026 marketing budget to AI search optimization, and 28% are allocating over half. For a channel that barely existed two years ago, this reallocation is unprecedented.

INDUSTRY SPOTLIGHT:

Financial services bets biggest, with **40% dedicating 51%-75% of their budget** — 2.5x the rate of retail (16%).

FIGURE 5

Approximately what percentage of your 2026 marketing budget is dedicated to AI-powered search/LLM platform visibility and optimization?



But results alone don't explain the urgency. The technology is evolving fast, and leaders worry about being left behind. According to one VP of marketing at a major health company: "[Our concern is] that our competitors will outmaneuver us. We are investing in what we believe to be best, but we lack long-term data and experience to guide us."

The scale of investment required is also driving budget shifts. As one healthcare data and analytics leader explained: "It requires a much larger online footprint, which means we will need to significantly invest in AI-driven discovery as well as traditional online discovery. The initial investment will be substantial."

Although there's no clear playbook for optimizing for AI search and discovery, nearly everyone is taking action. Eighty-one percent are already optimizing for AI search, with another 17% planning to start within the next 12 months. That's 98% either optimizing now or planning to.

Where's that budget going? The top tactics reveal long-term thinking: improving crawlability (62%), tracking and measuring AI-driven traffic (60%), creating LLM-friendly content formats (58%), and refreshing existing content for AI summaries (56%). These aren't quick wins — they're foundational investments that take time and resources. Leaders are treating this like a major channel build-out, not an experiment.

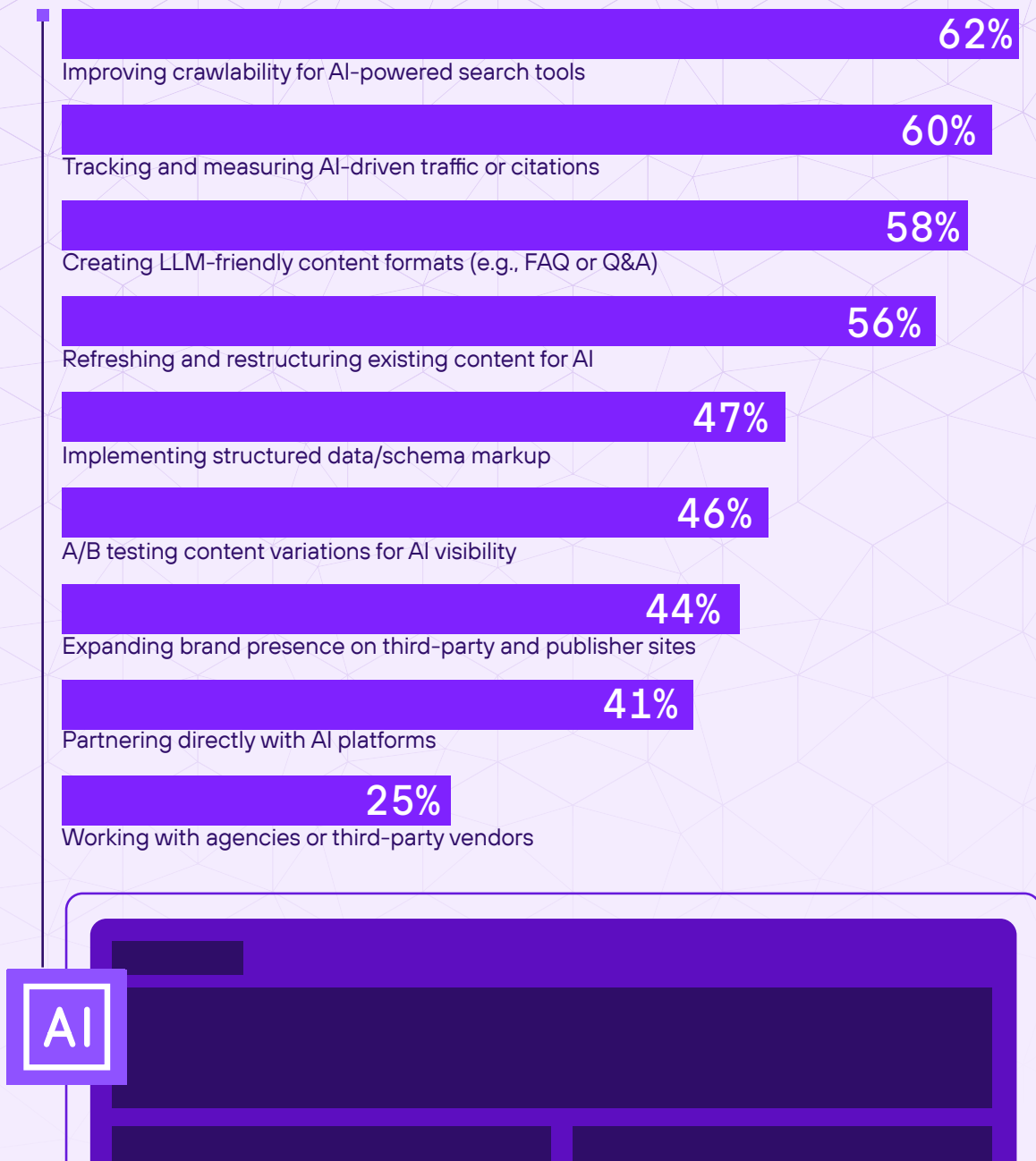


FIGURE 6.

Which tactics are you currently using or planning to use to optimize for AI-powered search?
 (Select all that apply)

Most of this work is happening in-house: Only 25% are working with agencies or vendors. That means teams are figuring out AI optimization on their own or leaning on in-house agencies. With 98% either actively optimizing or planning to, the question has shifted from “should we invest?” to “how much?”

Expert perspective



I think about AI search optimization as a maturity spectrum. Most brands are at Level 1: adding 'AI keywords,' tweaking a few schema tags, calling it done. Level 2 is proper LLM-ready content: entity clarity, consistent FAQ architecture, clean product data. Level 3, what I'd call true GEO strategy, is where real competitive advantage actually lives: structured data built for AI consumption, systematic monitoring of how models respond to queries about your brand, and closed feedback loops back into content and data architecture.



Mohammed Faizan N
SEO & LLMO Consultant
M+C Saatchi Performance

The companies with a real advantage right now are treating GEO like performance marketing, not like a one-time SEO project."



Traditional SEO evolved over decades. AI discovery is still forming. Treating this like an ad channel that can be A/B tested into submission shows a misunderstanding of how these systems work.

LLM visibility appears to correlate more with brand trust, structured entity signals, and authoritative presence across the web than with incremental content adjustments. In that sense, the strategy may be less about optimization and more about credibility.

The brands that win will not be the ones chasing short-term AI tactics. They will be the ones investing in durable brand authority and high-quality audience experiences."



Shana Haynie
Head of Content and
Organic Growth
MoEngage

IV.

Most enterprise leaders believe AI will close sales this year







AI search helped people find your website. That was 2025.

In 2026, 87% of enterprise leaders surveyed expect AI platforms to complete closed-loop sales – inside ChatGPT, Perplexity, Google’s AI Overviews – for their company’s products.

Most leaders see this shift as an opportunity, not a threat. Ninety-one percent say agentic AI will have a positive impact on their business: 47% expect significant positive impact through increased conversions and revenue, while 44% expect slight positive impact by adding a new, convenient channel for customers. One VP of data and analytics at a major financial services company said, “It’s all opportunity. We’re putting everything we can into it.”

INDUSTRY SPOTLIGHT:

Retail leads the optimism with 64% expecting significant positive impact, followed by financial services and health and wellness at 58% each. Travel is the outlier; only 24% expect significant impact, with 66% expecting slight impact. They see AI search as helpful but not game-changing.

-  Retail and e-commerce
-  Financial services
-  Health and wellness
-  Food and beverage
-  Media and entertainment
-  Travel and hospitality

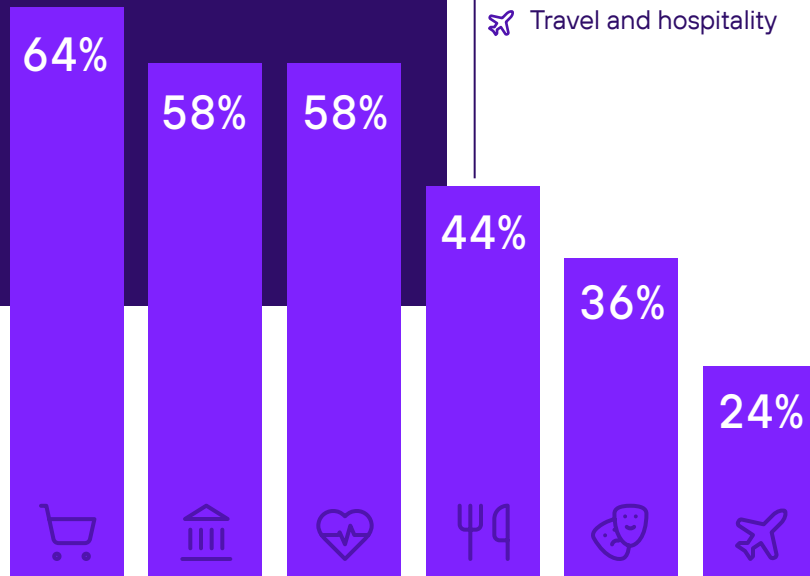


FIGURE 7.

Respondents expecting “significant positive impact – will increase conversions and revenue” by industry

Twelve months is an aggressive timeline for such a fundamental shift. For context, mobile commerce took years to reach widespread adoption. But the 89% who saw performance improvements in 2025 are now the most bullish about what's next. Take retail as an example: Nearly half saw significant improvement last year, and now almost two-thirds expect significant positive impact from agentic AI going forward.

Success breeds confidence, but it also raises questions about whether 91% are truly prepared. Only 41% are partnering directly with AI platforms, and just 25% are working with third-party vendors. The gap suggests many may be underestimating the infrastructure work required — deep linking strategies, conversion tracking outside their website, and integration with AI platform APIs.

Expert perspective

// It's astounding that 87% of senior leaders at large enterprises across industries think they'll be selling via AI this year. Some of these companies are probably still struggling with mobile. Sure, marketers are an optimistic bunch, but it's an incredible indication of how fast these leaders are willing to make the change.

Given that most of them are already seeing net positives from AI, it's a little less surprising many expect significant positive impacts — except for the three-quarters of travel and hospitality respondents: What are they afraid of?"



Adam Landis
Head of Strategic Growth
Branch



Confidence in measuring AI search conversions is high, but the tools aren't there yet

Ask enterprise leaders if they can measure AI-driven conversions, and two-thirds say they're confident. Sixty-six percent report feeling "very" or "extremely" confident, and 80% say AI attribution is clearer than traditional SEO.

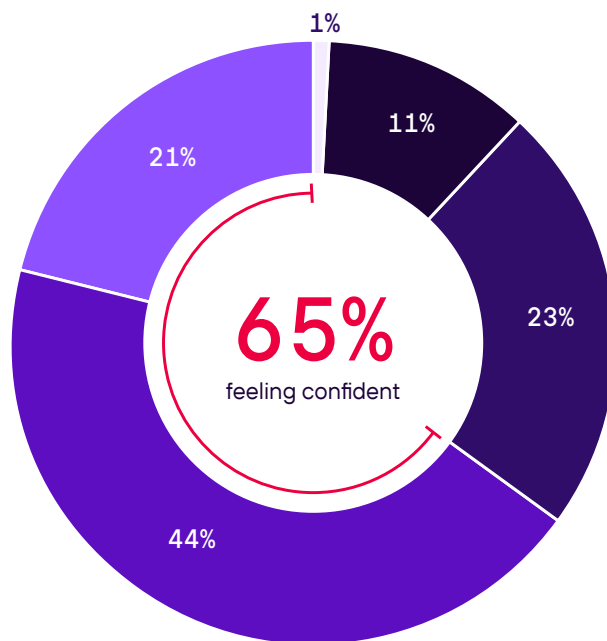


FIGURE 8.

How confident are you in your ability to accurately measure and attribute conversions originating from AI-powered search or LLM platforms?

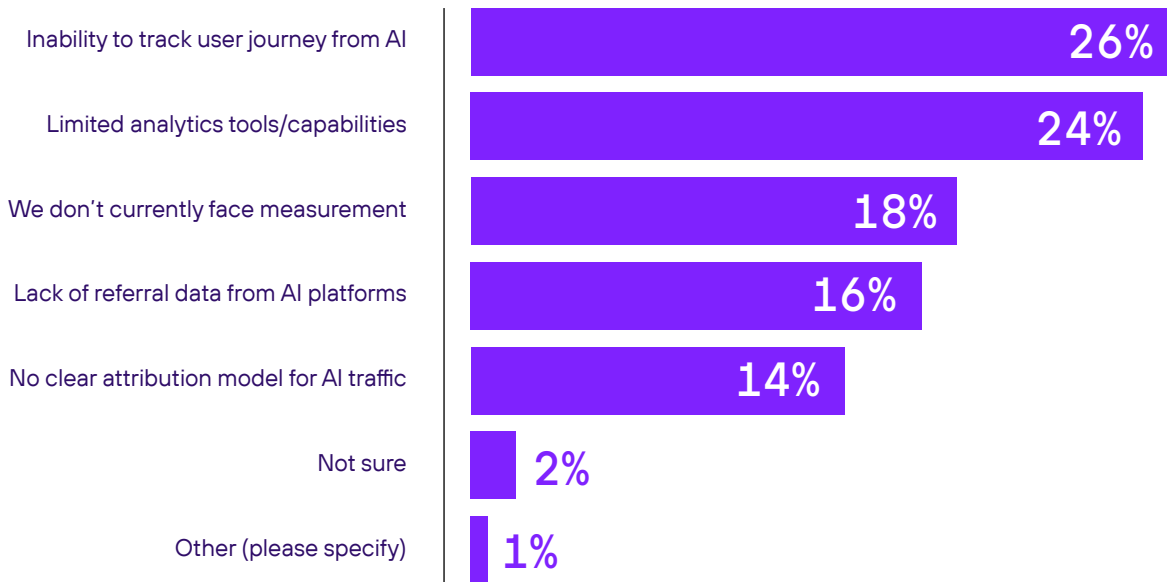
- Not confident at all
- Slightly confident
- Moderately confident
- Very confident
- Extremely confident

The numbers are surprisingly high given how new this channel is. But the explanation may be straightforward: AI search volumes are still relatively small, and the channel is nascent enough that there isn't much complexity yet. Teams are simply measuring referred traffic.

Despite that confidence, most leaders cite real challenges. Twenty-six percent point to "inability to track user journey from AI to conversions" as their biggest challenge, and 24% cite "limited analytics tools/capabilities." The confidence is there, but the infrastructure isn't.

FIGURE 9

What is your biggest challenge in measuring AI-driven discovery and conversions?



The top challenge reveals a critical gap: Leaders may be able to see that conversions happened, but not how AI discovery influenced the path to purchase. When someone interacts with an AI Overview, then visits your site an hour later through a different channel, how do you connect the dots? The analytics ecosystem built around traditional search — Google Analytics, Search Console, third-party web attribution tools — hasn't fully adapted to AI search and discovery. Leaders are improvising with the tools they have.

Expert perspective

// Teams are confident in what they can see, and what they can see is a small, clean edge of the funnel: clear referrals from AI platforms, last-click conversions. That's not measurement. That's noticing the obvious.



Mohammed Faizan N
SEO & LLMO Consultant
M+C Saatchi Performance

The real challenge is what's invisible. The most common AI-driven behavior pattern we track across client audits looks like this: A user encounters an AI Overview or asks ChatGPT about your category, gets an answer, then returns hours later via branded search or direct. At that point your analytics credits search or direct, not AI discovery. AI isn't showing up in your attribution model; it's hiding inside your branded search growth, your direct traffic lift, your 'unexplained' conversion spikes."



This feels like a modern version of a familiar marketing paradox. Just because you can't measure something perfectly doesn't mean it isn't influencing behavior. Consumer discovery is clearly shifting. If teams ignore AI-driven discovery simply because attribution is incomplete, they risk being absent where decisions are forming.



Jen Taylor
Director, AI Strategy
& Integration
Capacity Interactive

At the same time, confidence can be misleading. Tracking last-click referrals from AI platforms is very different from understanding influence across the full journey. Existing measurement frameworks were built for page views and clicks, not for decisions shaped inside AI interfaces."

VI.

What's keeping teams up at night: accuracy, transparency, and data privacy

When asked about their biggest concerns or opportunities regarding AI search and discovery, leaders cite a mix of operational challenges and strategic opportunities.

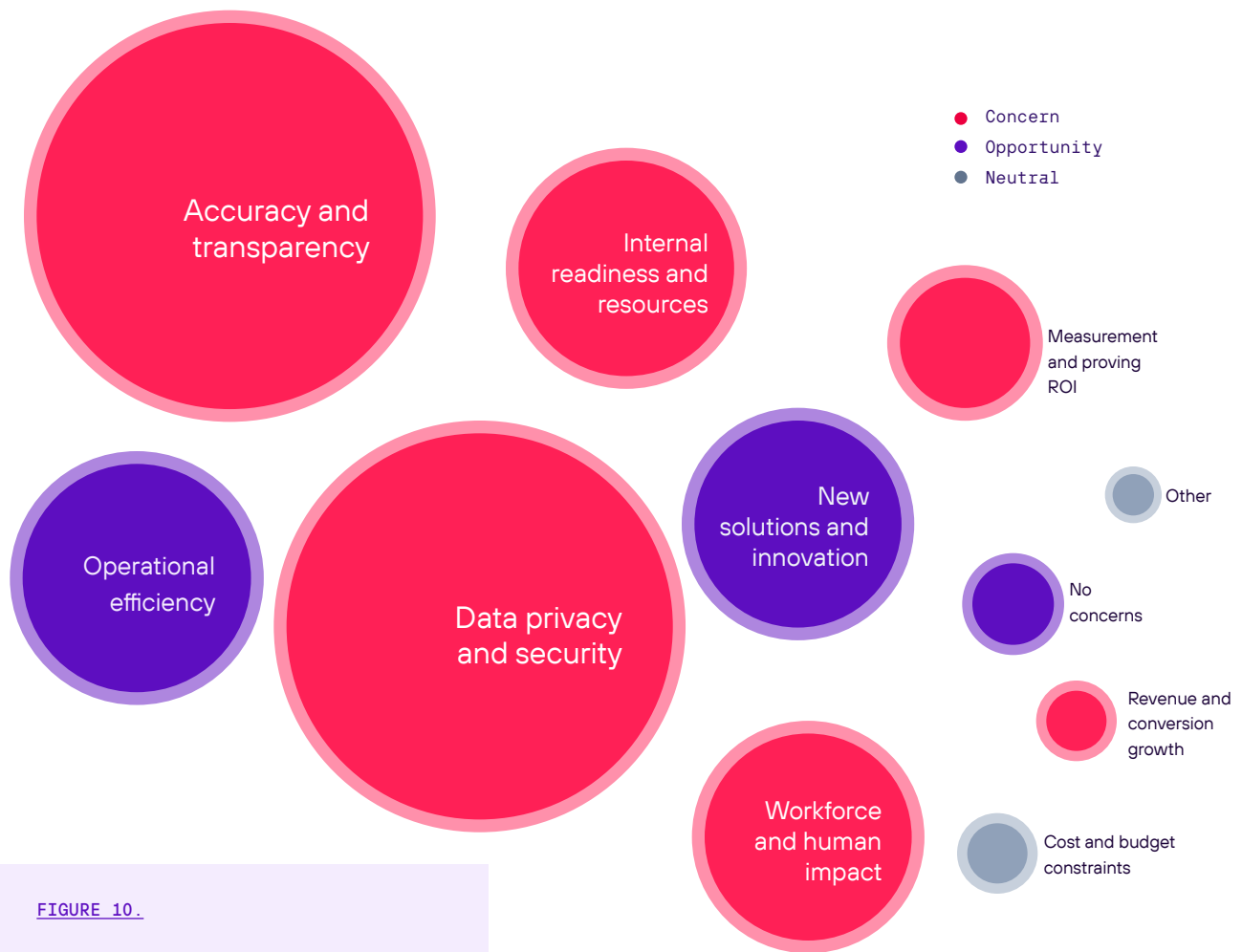


FIGURE 10.

What is your biggest concern or opportunity regarding AI search and discovery in 2026? response themes

Accuracy and transparency (19%) and data privacy and security (19%) tie as top concerns. Leaders worry about AI hallucinations, unreliable outputs, and whether they can verify what AI platforms are saying about their brands. For regulated industries like healthcare and financial services, the stakes are higher – data breaches and compliance failures carry real consequences. One healthcare director put it bluntly: “[I am worried] that we cannot maintain the confidentiality of patients’ data.”

“[My biggest concern is] AI-generated disinformation and misinformation.” – VP, Data and analytics, Retail

Internal readiness and resources (11%) and workforce impact (10%) follow closely. The question isn’t just whether AI works – it’s whether teams can actually use it. “I feel very positive regarding AI discovery; my biggest concern is finding and maintaining employees and services that understand the software,” one director noted.

Notably, measurement and return on investment (ROI) (7%) ranks lower than expected – despite 26% citing journey tracking as their biggest measurement challenge.

Expert perspective

// Data privacy and security is the biggest concern, and frankly, it scares the hell out of me too. Between the U.K. and Europe's GDPR and the U.S.'s patchwork of state and sector rules, it's a minefield before you even reach the AI layer. Everything points to one practical truth: You need control over what data goes in and where it goes. A laissez-faire 'we trust our people' attitude isn't control — it's foolish and dangerous."



Mick Rigby
CEO
Yodel Mobile

VII. The path forward

AI search and discovery are delivering results, commanding real budgets, and reshaping how customers interact with brands. But the data also reveals a gap: Leaders are confident and moving fast, yet many are building on shaky measurement foundations.

The teams that will win aren't waiting for the perfect playbook. Here are three areas to focus on today:

Build your measurement foundation now. The rules of discovery are changing. AI may influence more than it refers, meaning you'll need to track impact beyond traditional traffic metrics. Both SEO and AI search matter, and customers are moving fluidly between them. The 26% who can't track the user journey from AI discovery to conversion will struggle when stakeholders demand proof. Get your measurement house in order before the complexity outpaces your infrastructure.

Unify channels for holistic measurement. The data shows “old” channels like traditional SEO aren’t going anywhere while new ones emerge. This isn’t about choosing between SEO and AI search – it’s about understanding how they work together. When someone sees an AI Overview, clicks through from traditional search, and converts three days later, you need infrastructure that connects those dots across channels.

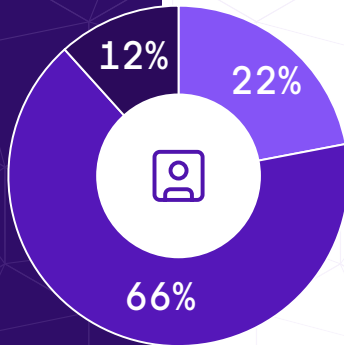
Don’t let measurement paralysis slow you down. Attribution models are evolving, but leaders don’t need perfect data to move forward. The 89% who saw performance improvements acted with directional confidence, using the insights available to them. Lean into probabilistic attribution and directional signals, and optimize based on what you can measure today,

The teams that win will connect AI discovery to business outcomes: not just traffic, but conversions, repeat purchases, lifetime value. When stakeholders ask about performance, you’ll need answers that go deeper than referral data.

Methodology

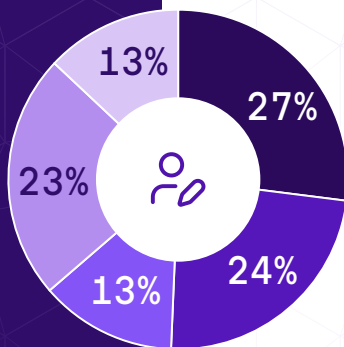
Branch surveyed 300 enterprise marketing, growth, and digital leaders in the United States in January 2026. All respondents work at companies with 500+ employees across six industries: financial services, food & beverage, health & wellness, media & entertainment, retail/e-commerce, and travel & hospitality.

Demographics



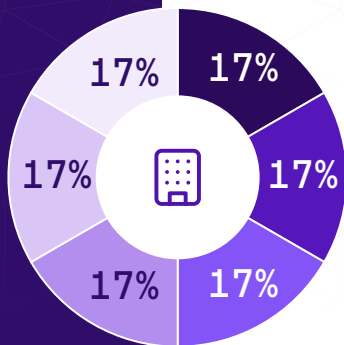
Which best describes your role?

C-suite (CMO, CDO, CPO, etc.)	66/300	22.00%
Director level	199/300	66.33%
VP or SVP level	35/300	11.67%



Which functional area do you work in?

Data/analytics	81/300	27.00%
E-commerce/digital	71/300	23.67%
Growth	39/300	13.00%
Marketing	70/300	23.33%
Product	39/300	11.67%



Which industry best describes your company?

Financial services	50/300	16.67%
Food and beverage	50/300	16.67%
Health and wellness	50/300	16.67%
Media and entertainment	50/300	16.67%
Retail and e-commerce	50/300	16.67%
Travel and hospitality	50/300	16.67%



Branch builds and provides software as a service for enterprise businesses to acquire, retain, and engage their users. We do this by delivering deep linking solutions that work across all environments and AI-powered measurement solutions to help organizations make and save money by optimizing advertising spend. World-class brands like Instacart, Western Union, NBCUniversal, Zocdoc and Reddit rely on Branch to drive better ROI on marketing spend and keep users engaged.

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