



TREND CANDY · ORIGINAL RESEARCH · 2026

# The Invisibility Crisis

## Why 71% of B2B Brands Are Missing from AI Answers — and What the Winners Are Doing Differently

Based on original research with 512 B2B SaaS & Cybersecurity marketing leaders (Manager level or above) · April 2026



**71%**

of B2B brands are largely invisible in AI-generated answers



**68%**

cannot measure AEO success in any meaningful way



**61%**

fear losing traffic to zero-click AI answers



**65%**

say original data is "very important" to AEO success

Source: TrendCandy Survey · 512 B2B SaaS & Cybersecurity Marketing Leaders, Manager Level or Above · April 2026

## For years, B2B marketing had a clear playbook. Rank in search. Drive traffic. Convert visitors.

That model is breaking. Your buyers are no longer just searching, they're asking AI. And when they do, something fundamental changes.

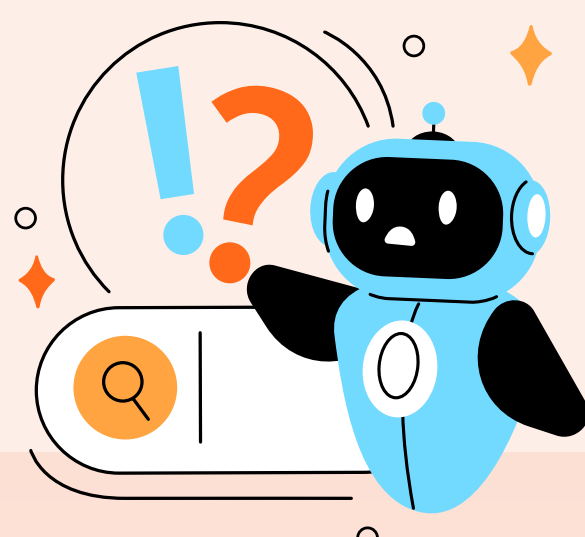
### THE NEW REALITY

They don't see a list of options. They don't click through ten links. They get one synthesized answer. Which means fewer brands get visibility, fewer brands get considered, and most brands get excluded entirely, without ever knowing it happened.

This report draws on TrendCandy's original survey of 512 B2B SaaS and Cybersecurity marketing leaders to show you exactly what's happening, what it costs the brands that don't act, and what the brands currently winning have in common.



# The Shift Has Already Happened, and Most Brands Missed It



## Your market already feels it.

AI-powered research tools - ChatGPT, Claude, Gemini, Perplexity, have become the first stop for B2B vendor discovery, not the second. The data on this is no longer directional; it is definitive.

Forrester research from 2026 found that 89% of B2B buyers have adopted generative AI as a central tool for self-directed research. A Whitehat B2B Lead Generation Report puts it more bluntly: 80% of B2B tech buyers now use AI tools as much as or more than traditional search for vendor research. And G2 data shows 32% of B2B buyers are already discovering new vendors directly through generative AI chatbots.

These aren't projections, they are buyer behaviours happening right now, in your market, with your prospects.

### SURVEY DATA

When you think about how buyers discover your brand today, which statement feels closest to reality?

Search engines are still the primary gateway	<div style="width: 38%;"></div>	<b>38%</b>
<b>AI tools are becoming equally important as search</b>	<div style="width: 34%;"></div>	<b>34%</b>
AI tools are overtaking search as the starting point	<div style="width: 12%;"></div>	<b>12%</b>
Discovery is fragmented across many channels	<div style="width: 13%;"></div>	<b>13%</b>
I'm not sure how buyers are discovering vendors anymore	<div style="width: 3%;"></div>	<b>3%</b>

Source: TrendCandy Survey of 512 B2B Marketing Leaders, April 2026

Nearly half of B2B marketing leaders, 46%, already describe AI as equally or more important than search for buyer discovery. And only 38% still believe search is the primary gateway. That number will be lower next year.

Meanwhile, the G2 AEO software category grew by more than 2,000% between March 2025 and early 2026, expanding from just 7 products to over 150. The infrastructure of AEO is forming around your buyers in real time.

## Most marketers know AEO matters. Almost none feel confident about it.

Awareness of the AEO shift is widespread. Readiness to act on it is not.



### SURVEY DATA

Which statement best reflects your internal conversations about AEO?

This is as big as SEO - maybe bigger	<div style="width: 22%;"></div>	<b>22%</b>
<b>This matters, but we're still figuring it out</b>	<div style="width: 46%;"></div>	<b>46%</b>
We're hearing about it, but not acting yet	<div style="width: 18%;"></div>	<b>18%</b>
This feels overhyped for our business	<div style="width: 10%;"></div>	<b>10%</b>
We're not discussing AEO internally	<div style="width: 4%;"></div>	<b>4%</b>

Source: TrendCandy Survey of 512 B2B Marketing Leaders, April 2026

68% of marketers are either still figuring AEO out or haven't started acting on it. And when asked how confident they are in understanding how AI tools choose what to include in answers, the foundational question any AEO strategy depends on, only 6% said they were very confident. 56% said they were neutral, unconfident, or very unconfident.

### SURVEY DATA

How confident are you in your understanding of how AI tools choose what to include in answers?

Very confident	<div style="width: 6%;"></div>	<b>6%</b>
Confident	<div style="width: 28%;"></div>	<b>28%</b>
Neutral / Unsure	<div style="width: 34%;"></div>	<b>34%</b>
<b>Unconfident</b>	<div style="width: 22%;"></div>	<b>22%</b>
Very unconfident	<div style="width: 10%;"></div>	<b>10%</b>

Source: TrendCandy Survey of 512 B2B Marketing Leaders, April 2026

**This is a market that knows the shift is happening, but doesn't yet know how to respond. That gap between awareness and execution is where the opportunity lives for the brands that move first.**

## Most brands are already invisible. And some that aren't, wish they were.

Here's the finding that should stop every B2B content leader in their tracks.



### SURVEY DATA

Which statement best reflects your current position in AI-generated narratives?

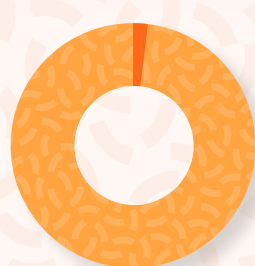
We are actively shaping how AI represents our category	<div style="width: 2%;"></div>	<b>2%</b>
We are reacting to how AI represents our category	<div style="width: 9%;"></div>	<b>9%</b>
<b>We are largely invisible in AI-generated narratives</b>	<div style="width: 71%;"></div>	<b>71%</b>
We don't know where we stand	<div style="width: 18%;"></div>	<b>18%</b>

Source: TrendCandy Survey of 512 B2B Marketing Leaders, April 2026



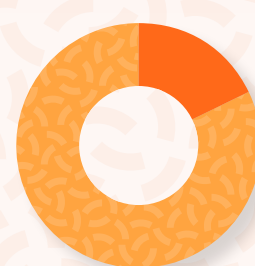
**71%**

largely invisible in AI-generated answers



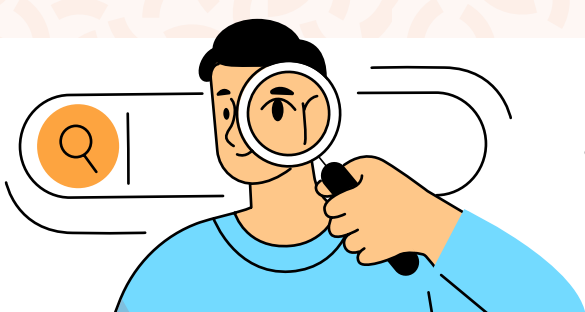
**2%**

actively shaping how AI represents their category



**18%**

don't even know where they stand



**"There is no page 2 in AI search. There is only inclusion - or exclusion."**

For 71% of B2B brands, buyers are researching their category in AI tools and the brand simply isn't part of the conversation. New buyers form shortlists that never include them. Existing customers explore alternatives, and the brand being evaluated against doesn't even know the conversation happened.

And then there's the second problem - what happens to the brands that do appear?

### SURVEY DATA

When your brand appears in AI-generated answers, how accurate is the representation?

Very accurate	<div style="width: 5%;"></div>	<b>5%</b>
Accurate	<div style="width: 29%;"></div>	<b>29%</b>
Neutral / Unsure	<div style="width: 33%;"></div>	<b>33%</b>
<b>Inaccurate</b>	<div style="width: 24%;"></div>	<b>24%</b>
Very inaccurate	<div style="width: 9%;"></div>	<b>9%</b>

Source: TrendCandy Survey of 512 B2B Marketing Leaders, April 2026

Only 34% of marketers say their brand is accurately represented when it does appear in AI answers. 33% are unsure, and 33% say the portrayal is inaccurate or very inaccurate.

Invisibility is the primary crisis. Misrepresentation is the secondary one, and both stem from the same root cause: not producing the kind of content AI selects as authoritative.



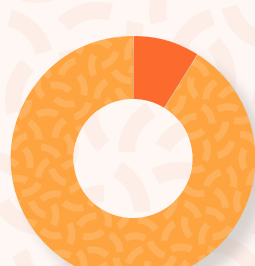
**46%**

say AEO matters, but they're still figuring it out



**68%**

say measuring AEO success is their top concern



**9%**

have clear AEO measurement in place

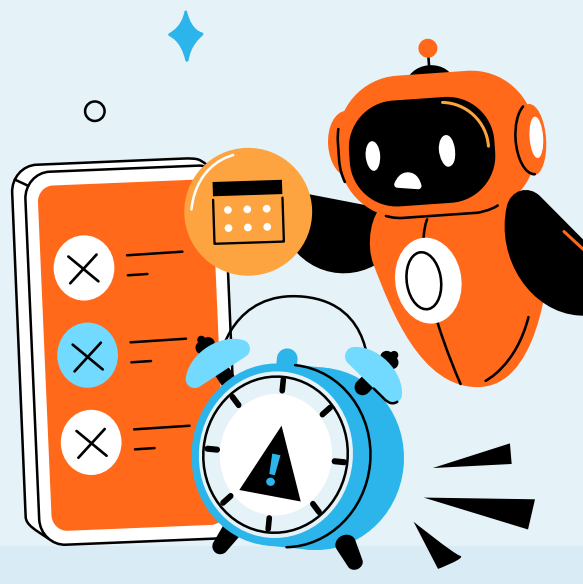


**42%**

believe AEO will match or surpass SEO within 2 years

## The Cost of Inaction - Why This Should Worry You

AEO invisibility isn't a gap you can paper over with more blog posts or a better keyword strategy. It affects the buyer journey before your website is ever visited, and it compounds the longer you leave it. Here's what the cost actually looks like.



### 01 You lose visibility before the buyer ever reaches you.

When AI answers a buyer's research question, your website isn't visited. Your content isn't seen. Your brand isn't considered. The deal was never in play, and your analytics show nothing, because there was nothing to track.

61% of B2B marketers already list losing traffic to zero-click AI answers as one of their top concerns. But the traffic loss understates the real risk: buyers form a view of the competitive landscape, who the credible vendors are, and you weren't in the picture.

#### SURVEY DATA

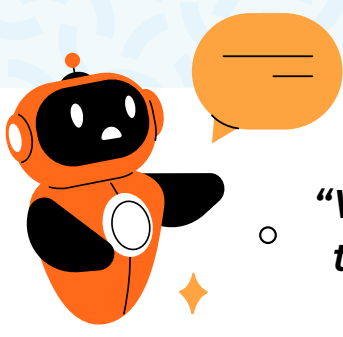
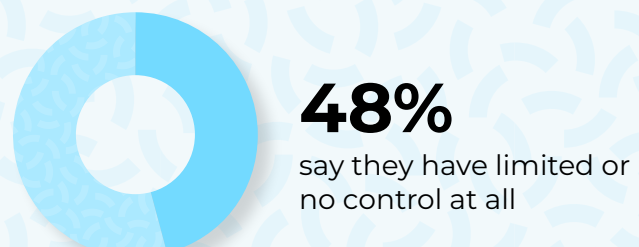
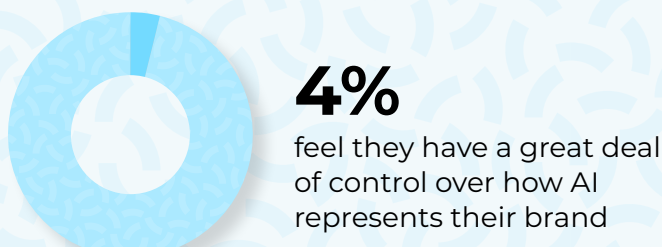
What concerns you most right now regarding AEO? (Select all that apply)

Not knowing how to measure success	<div style="width: 68%;"></div>	68%
Losing traffic due to zero-click answers	<div style="width: 61%;"></div>	61%
Producing content that AI ignores	<div style="width: 52%;"></div>	52%
Losing control of our brand narrative	<div style="width: 47%;"></div>	47%
Producing too little content	<div style="width: 21%;"></div>	21%

Source: TrendCandy Survey of 512 B2B Marketing Leaders, April 2026

### 02 You lose control of your narrative.

In the SEO era, you controlled your pages, your messaging, your positioning. In the AI era, the model decides how your brand is described, and most marketers feel that control slipping away fast.



*"We used to optimize for rankings. Now we're hoping to be mentioned. That's not a strategy. That's a wish."*

### 03 You get replaced by competitors without knowing why.

One of the most revealing findings from our survey: the biggest unanswered AEO questions aren't about tactics, they're about the competition.

#### SURVEY DATA

What is the hardest AEO-related question you cannot currently answer?

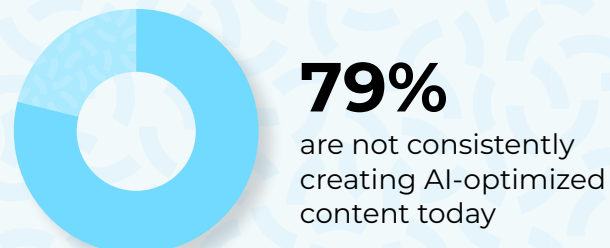
What content actually drives visibility	<div style="width: 27%;"></div>	27%
Why competitors are being cited instead of us	<div style="width: 24%;"></div>	24%
Whether we are being cited by AI	<div style="width: 21%;"></div>	21%
Where to invest next	<div style="width: 15%;"></div>	15%
How AEO impacts revenue	<div style="width: 13%;"></div>	13%

Source: TrendCandy Survey of 512 B2B Marketing Leaders, April 2026

Brands can lose market share without losing rankings. Without losing traffic. Without knowing it's happening, until it's already happened.

### 04 Your content becomes invisible to AI, regardless of how much you produce.

AI doesn't reward volume, it rewards sources. And most content, however well-written, however frequently published, simply isn't a source. It's a summary of sources, and AI already has those.



#### THE PAINFUL PARADOX

Teams working harder on content than ever before are seeing diminishing returns - because the rules of what earns visibility have changed. Volume and quality aren't the differentiators in the AI era. Originality and citability are.

### 05 You miss the window - while it's still open.

The brands establishing authority in AI answers now are building a compounding advantage that becomes progressively harder to overcome.

#### SURVEY DATA

How often do you create content designed to be cited or extracted by AI today — and 12 months from now?

Always - today vs. 12 months from now	<div style="width: 6% to 18%;"></div>	6% → 18%
Often - today vs. 12 months from now	<div style="width: 18% to 36%;"></div>	18% → 36%
Occasionally - today vs. 12 months from now	<div style="width: 39% to 30%;"></div>	39% → 30%
Rarely / Never - today vs. 12 months from now	<div style="width: 37% to 16%;"></div>	37% → 16%

Source: TrendCandy Survey of 512 B2B Marketing Leaders, April 2026

Intentional creation of AI-optimized content is set to more than double in the next 12 months - from 24% doing it always or often today, to 54% in a year's time. The brands investing in original research now aren't just improving today's visibility; they're shaping what AI knows about their category for years to come.

**61%** of B2B marketing leaders believe AEO will be as important as SEO within two years. Only 11% think it's overhyped. The direction isn't in doubt, the question is whether your brand will be visible when the market fully arrives.

### For the content marketer in the middle, this isn't just a strategy gap.

Leadership is already asking: "Why aren't we showing up when prospects search AI tools?" Sales is already noticing: "Buyers are arriving with a shortlist we're not on." And the marketer between them - the Director, the VP, the Head of Content - is left trying to explain a problem they don't yet have the tools to solve.

The hardest part isn't the question of what to do. 51% of B2B marketers already know the answer: invest in original research. The hardest part is knowing exactly what to do while watching competitors quietly become the source AI cites in your category.

# The Solution — Why Original Data Is the Secret Sauce of AEO

If AI is summarizing the internet, the winners are the sources, not the summaries.

Google ranked the best content. AI summarizes the best sources. The brands appearing in AI-generated answers aren't necessarily producing the most, the longest, or the most technically optimized content. They're producing the content that the rest of the internet points to. And nothing earns that status more reliably than original data.

What actually gets cited - your peers are already telling you.

SURVEY DATA	
In your experience, what earns visibility in AI-generated answers? (Select up to 3)	
Clear, direct answers to specific questions	64%
Original data or research	58%
Strong brand authority	49%
Third-party mentions and PR	44%
High-ranking SEO content	41%

Source: TrendCandy Survey of 512 B2B Marketing Leaders, April 2026

SURVEY DATA	
Which type of content gives you the best chance of being cited by AI?	
Original research / proprietary data	42%
Educational 'how-to' content	21%
Short, structured Q&A content	19%
Product-focused content	6%
Not sure	12%

Source: TrendCandy Survey of 512 B2B Marketing Leaders, April 2026



65%

say original data is "very important" to AEO success



51%

are actively investing in original research to improve AEO performance



42%

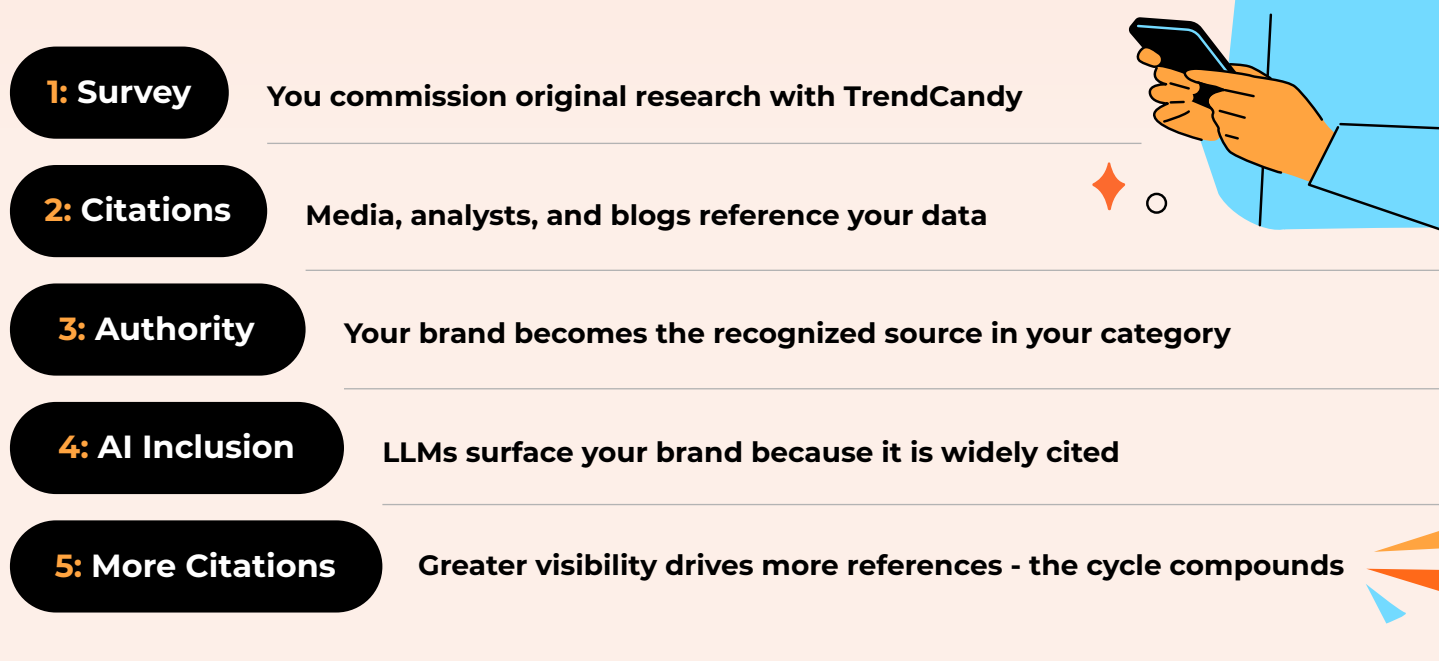
say original research is the #1 content type most likely to earn AI citation

## The AEO physics of original survey data.

AI models are designed to do three things: prefer unique information, prioritize authoritative sources, and reinforce widely cited insights. Original survey data does all three simultaneously.

- ✓ **It's unique.** No one else has your data. It exists because you created it, and that makes it intrinsically citable.
- ✓ **It's authoritative.** Primary research carries a credibility that repurposed content never can. You're not summarizing the conversation, you're starting it.
- ✓ **It gets cited.** Media reference it. Analysts quote it. Competitors acknowledge it. Every citation signals to AI that your brand is a source worth including.

And here's what that creates - a compounding effect that builds on itself:



## THE DATA ADVANTAGE



Brands with original data embedded in their content are cited on average 4x more than those without it. And LLMs don't just surface original research - they learn from it, meaning your data shapes what AI knows about your category going forward, not just today. When asked which has had the biggest positive impact on AEO performance so far, publishing original research or proprietary data was the #1 answer - ahead of content structure, SEO, PR, and increased volume combined.

Everyone believes it. Almost no one is executing it yet.

SURVEY DATA	
How important is original data or research to succeeding in AEO?	
Very important	65%
Somewhat important	30%
Neutral / Unsure	3%
Somewhat unimportant	1%
Very unimportant	1%

Source: TrendCandy Survey of 512 B2B Marketing Leaders, April 2026

95% of B2B marketing leaders believe original data is at least somewhat important to AEO success. But only 24% say original research is already driving meaningful results for them. And 20% don't produce original research at all.

*"If you're not producing original data, you are training AI - not being cited by it."*

Original research isn't just an AEO play. It solves three problems at once.

- 01 The Reach Problem - You stop promoting alone.**  
Original data gives journalists, analysts, and industry influencers something to point to. Your brand becomes the source, not the echo - with third parties amplifying your message and earning the AI citations that follow. You reach more buyers because others are doing the pointing for you.
- 02 The Trust Problem - No one buys from you until they buy into you.**  
Data creates authority at scale. Proprietary research positions your brand as an evidence-based voice in your category - the kind of brand buyers trust before they've visited your website. Content so valuable, they'd pay for it if they had to.
- 03 The Quantity Problem - One survey. Months of content.**  
A single well-designed survey generates dozens of distinct insights, statistics, and story angles. When you have original data, you never start from a blank page - you start from a foundation of evidence that fuels blogs, reports, PR, social, and sales enablement for a full year.

The market has already told you what separates the leaders.

SURVEY DATA	
Which statement best describes the organisations winning at AEO right now?	
They are creating unique, authoritative content others cite	39%
They have strong brand recognition and trust	28%
It's still too early to tell	17%
They are technically optimized better than others	9%
They produce content at a higher volume	7%

Source: TrendCandy Survey of 512 B2B Marketing Leaders, April 2026

39% of B2B marketers say the organisations winning at AEO are creating unique, authoritative content that others cite - the single most common answer. Not technical optimisation (9%). Not higher volume (7%). Citability.

## What to do next.

That doesn't happen by publishing more blog posts. It happens by publishing original insights the market doesn't already have - data that earns your brand a seat at the table inside every AI-generated answer in your category.

TrendCandy creates custom survey data for B2B SaaS and Cybersecurity brands, built with a content marketer's eye for storytelling, a journalist's instinct for the finding that earns coverage, and a data scientist's commitment to credibility.

One survey gives you:

- ✓ A flagship research report that anchors your brand as a category authority
- ✓ Data points that fuel blog posts, newsletters, and LinkedIn content for months
- ✓ Press hooks designed to earn third-party coverage - and the AI citations that follow
- ✓ Sales enablement material your team can use at every stage of the buyer journey
- ✓ Customer content that delivers unexpected value and reinforces retention
- ✓ A narrative your competitors cannot replicate - because the data is exclusively yours

*"In the AI era, you don't win by publishing more. You win by being the source everyone else uses."*

READY TO BECOME A SOURCE?

## Let's Map Out Your AEO Strategy

On the call: where your brand likely stands in AI visibility today, what kind of data would make you cite-worthy, and how to turn one survey into a year of content, PR, and pipeline.

→ Book Your Free Consultation

No commitment. No sales pressure. Just clarity on your AEO position.  
Clients include SAP · Adobe · Deloitte · Intercom · RingCentral · Qualtrics