STATE OF THE ART DIGITAL

YOUR BUSINESS IS BECOMING INVISIBLE

Why AI is erasing your customers' ability to find you, and what to do about it

A strategic briefing for businesses that depend on internet visibility

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Executive Summary

Something has changed. Not gradually, and not in a way that will reverse itself. The relationship between businesses and their customers has always been mediated by search, before the Internet that may have been local classified adverts or Yellow Pages. For the better part of the last three decades online that meant Google. A business that ranked well on Google was visible. A business that did not, was not. The rules were understood, the investment was clear, and the system, however imperfect, was legible.

That system is now being dismantled. Not replaced by a better search engine, but superseded by something categorically different, AI: artificial intelligence that answers questions directly, without sending users to websites at all. The implications for any business that depends on internet traffic are profound, and in many cases immediate.

> ***The shift is no longer a forecast. It is measured, documented, and already costing businesses traffic, enquiries, and revenue.***

The scale of the behavioural change is now verifiable. Sixty-eight per cent of all Google searches end without a single click to any website. When Google's AI Overviews are present, organic click-through rates have fallen 61 per cent. HubSpot, one of the most sophisticated SEO operations in the world, lost between 70 and 80 per cent of its organic traffic in under twelve months. These are not projections. They are outcomes already visible in web analytics dashboards across every sector.

For businesses in automotive retail, estate agency, local services, and professional services, this is not a future concern. It is a present commercial reality.

68%
of all Google searches now end with no click to any website
SparkToro / Similarweb, 2026

61%
drop in organic click-through rate when Google serves an AI answer above results
Seer Interactive, Sept 2025

70%-80%
of HubSpot's organic traffic lost in under twelve months
Ahrefs / HubSpot CEO, Q1 2025

Against this backdrop, State of the Art Digital has conducted OPTIMUM audits across businesses in UK automotive retail and residential estate agency. The findings are consistent. Assessed across seven dimensions of AI search visibility, the average readiness score was 5.5 out of 10, against a 7/10 threshold OPTIMUM audit data associates with reliable AI citation. The majority of businesses audited scored below six in at least four of the seven dimensions. In no case had the business previously assessed its AI visibility in any structured form.

The purpose of this report is to explain, as plainly as possible, what has changed, which businesses are most at risk, and what a structured response looks like. The OPTIMUM framework provides that structure. It is a seven-dimension diagnostic that assesses AI visibility with the rigour typically associated with a professional audit, and produces a clear, prioritised remediation plan.

Section 5. shows an example report. An anonymised real OPTIMUM audit conducted on a well-established UK business trading in a high-consideration consumer sector.

> ***The businesses that act now will not merely survive the transition. They will own it.***

SECTION 1: WHAT HAS CHANGED

From Ranking to Citation

The architecture of search has shifted

For most of the internet age, the logic of search was straightforward. Users typed a query, Google returned a list of links, and the businesses that appeared near the top received a disproportionate share of clicks. Success in this environment was measurable and, to a degree, manageable. An investment in search engine optimisation could be tracked against traffic, and traffic against revenue. The relationship, whilst never perfectly linear, was coherent.

The arrival of AI Overviews within Google search, and the parallel rise of standalone AI platforms including ChatGPT, Perplexity, and Microsoft Copilot, has broken that coherence. These tools do not curate a list of links for users to evaluate. They synthesise an answer from multiple sources and present it directly. They have, in effect, placed themselves between the user and every website on the internet.

The consequences are not theoretical. Seer Interactive analysed 3,119 informational queries across 42 organisations, covering more than 25 million impressions. Organic click-through rates for queries where Google serves an AI Overview have fallen 61 per cent since June 2024. Even on queries where no AI Overview appeared, click-through rates fell by 41 per cent over the same period. The broader behavioural shift is happening independently of whether AI Overviews are present or not.

HubSpot's CEO Yamini Rangan addressed the decline directly on the company's Q1 2025 earnings call. Her observation is worth noting precisely because it came from a business whose own SEO operation had been regarded as exemplary.

> ***"Organic search traffic is declining globally. AI Overviews are giving answers, and fewer people are clicking through to websites."***

> Yamini Rangan, CEO HubSpot. Q1 2025 earnings call.

The distinction that matters most in this new environment is the difference between ranking and being cited. A business can rank in position one on Google and receive no benefit from that position if an AI Overview answers the query above it. Conversely, a business whose content is structured to be cited by AI systems will appear in the synthesised answer itself, commanding a form of visibility that no traditional ranking can replicate.

This is not an incremental change in how search engine optimisation works. It is a structural change in how discovery happens. The businesses that understand this distinction, and act upon it, will compound their advantage with every quarter that passes.

The Zero-Click Economy

The concept of the zero-click search predates AI Overviews, but AI has accelerated it to a point where it must now be considered the default rather than the exception. A zero-click search is one in which the user receives a satisfactory answer on the search results page itself, without clicking through to any website.

Sixty-eight per cent of all Google searches now end without a click. Zero-click searches grew from 60 per cent in 2024 to 68 per cent by early 2026 according to SparkToro's Similarweb-panel analysis, the fastest two-year acceleration the metric has shown. When AI Overviews are present, the zero-click rate rises to 83 per cent. In Google's AI Mode, it reaches 93 per cent.

Pew Research tracked 68,000 real searches from 900 adults in the United States and found that users clicked a result only 8 per cent of the time when an AI summary appeared, compared with 15 per cent when no summary was present. Users are 26 per cent more likely to end their search session entirely after seeing an AI Overview than after seeing standard results. The click is not merely being reduced. For a growing share of queries, it has ceased to exist.

For businesses whose customer acquisition rests on attracting visitors from search, this is not a peripheral concern. The traffic they have been optimising for is diminishing not because their websites have deteriorated, but because the architecture of the environment in which those websites existed has fundamentally changed.

SECTION 2: WHEN RANKINGS HOLD BUT TRAFFIC VANISHES

The HubSpot Warning

What happens when clicks stop arriving for pages that still rank

HubSpot is not a cautionary tale about a poorly managed digital presence. It is one of the most respected marketing platforms in the world, with an in-house SEO team that set the standard for content-led organic growth for over a decade. Between November 2024 and the second quarter of 2025, HubSpot lost between 70 and 80 per cent of its organic search traffic. Its rankings did not collapse. Its impressions held. The click simply stopped arriving.

The cause was structural. HubSpot had built much of its traffic on informational content: sales templates, cover letter guides, marketing definitions. These are precisely the query types AI Overviews answer directly. Google's AI read HubSpot's content, synthesised the answer, and delivered it on the results page. The user was satisfied. No visit was recorded.

> ***If HubSpot, with one of the best SEO teams in the world, can experience this, none of us are safe.***
>
> Industry analyst reaction, widely circulated on LinkedIn, early 2025.

HubSpot is the most prominent example, but the pattern repeats across the wider publishing and content industry:

- Forbes experienced a 50 per cent organic traffic decline year-on-year by mid-2025
- Business Insider lost 55 per cent of its organic search traffic between 2022 and 2025, leading to a 21 per cent staff reduction in May 2025
- CNN suffered traffic declines of between 27 and 38 per cent year-on-year
- 37 of the top 50 US news websites recorded year-on-year traffic declines in May 2025
- Global publishers collectively saw Google traffic fall by approximately one third in 2025

Most agency portfolios serving content-heavy clients are recording traffic losses of between 30 and 70 per cent on informational queries. Rankings remain flat. Impressions are stable or rising. BrightEdge documented a 49 per cent year-on-year increase in search impressions alongside a 30 per cent drop in average click-through rates in May 2025. More visibility, fewer visits. That is the zero-click economy in a single data point.

There is a further complication that makes the picture harder to manage. The overlap between pages that rank in Google's top ten organic results and pages cited inside AI Overviews has collapsed. In mid-2025, approximately 75 per cent of URLs cited in AI Overviews also held a top-ten organic ranking. By early 2026, that overlap had fallen to between 17 and 38 per cent. Your ranking and your AI visibility are now separate problems requiring separate strategies.

SECTION 3: WHO IS MOST AT RISK

The Sectors Where the Stakes Are Highest

Not every business is equally exposed to the shift in search behaviour, but certain sectors are structurally more vulnerable than others. What they share is a common dependency: customers find them through search, and the decision to enquire, visit, or purchase is typically preceded by a research phase conducted online. These are precisely the queries AI is now answering directly.

Automotive Retail

Car buyers conduct an average of twelve hours of research before visiting a dealership. AI systems are now fielding a significant proportion of those research queries directly, synthesising comparisons, surfacing reviews, and in some cases recommending specific models without ever directing the user to a dealer's website. Businesses not structured to appear within those AI responses are invisible at the most critical stage of the customer journey.

Estate Agency

Property buyers and sellers begin their process online, often months before they contact an agent. Questions about local market conditions, average sale prices, and agent comparisons are precisely the queries AI Overviews are now answering. An agent without strong AI visibility loses consideration before a single conversation takes place.

Local and Professional Services

Solicitors, accountants, independent retailers, tradespeople, and hospitality businesses all depend on local search visibility. AI is now answering local intent queries with synthesised recommendations. A business not structured for AI citation does not appear in those recommendations, regardless of how long it has traded or how many positive reviews it holds.

B2B and Professional Advisory

Consultancies, technology suppliers, training providers, and financial services businesses face a particular challenge: AI platforms now conduct the initial research phase on behalf of potential clients, and the source that is cited becomes the default recommendation. The conversion advantage of AI-referred traffic makes this an urgent opportunity as much as a risk.

A Note on Readiness

Between the fourth quarter of 2024 and the second quarter of 2026, State of the Art Digital conducted OPTIMUM audits across businesses in UK automotive retail and residential estate agency. The findings were consistent, and concerning.

Assessed across seven dimensions of AI search visibility, the average readiness score was 5.5 out of 10. The majority of businesses scored below six in at least four of the seven dimensions. In no case had the business previously assessed its AI visibility in any structured form. The problem is not merely that businesses are unprepared. It is that most do not yet know they are unprepared.

> ***"Half marks is not a crisis. It is, however, exactly what your most ambitious competitor is hoping you will settle for."***
>
> David Ogilvy.

SECTION 4: THE SEVEN DIMENSIONS OF AI VISIBILITY

The OPTIMUM Framework

The OPTIMUM framework was developed by State of the Art Digital to assess AI search readiness with the rigour and consistency of a professional audit. It does not rely on subjective judgement or aspirational benchmarks. Each of the seven dimensions is scored against specific, measurable criteria, and each score is supported by evidence gathered from the business's live digital presence.

What follows is a plain-language introduction to each dimension. The purpose is not to provide a self-assessment checklist but to allow business owners and marketing leaders to understand what is being evaluated, and why each dimension matters to the outcome.

A worked example. Take Entity and Brand Clarity. A score of 4/10 typically means the business name, address, and category appear inconsistently across the website, Google Business Profile, and directories, for example "Smith Motors" on the website but "Smith Motors 1972 Ltd" on one directory and "Smith Garage" on another, with no schema markup tying the variants to a single entity. A score of 7/10 means the same name, category, and location data appear identically across every property, reinforced by an Organization schema block that names the entity explicitly. The gap between those two scores is not stylistic. It is the difference between an AI system being able to state with confidence who the business is, and an AI system encountering enough ambiguity that it cites a competitor instead.

#	Dimension	What it assesses and why it matters
01	**Technical Foundation**	Whether the technical infrastructure of the website permits AI crawlers and search systems to access, read, and index content reliably. A technically compromised site cannot be cited, regardless of the quality of its content.
02	**Content Quality and E-E-A-T**	Whether the content demonstrates real Experience, Expertise, Authoritativeness, and Trustworthiness. AI systems are trained to surface authoritative sources. Content that lacks depth, specificity, or genuine expertise will be passed over in favour of sources that demonstrate it.
03	**Entity and Brand Clarity**	Whether AI systems can unambiguously identify what the business is, what it does, where it operates, and who it serves. Ambiguity at the entity level is one of the most common and most consequential failures found in OPTIMUM audits.
04	**Topical Authority**	Whether the business has established genuine authority over the topics most relevant to its sector and customer base. Depth of coverage across a coherent topic cluster is a strong predictor of AI citation.
05	**Trust and Credibility Signals**	Whether third-party signals, including reviews, press coverage, professional accreditations, and citations from authoritative sources, reinforce the business's credibility in the eyes of AI systems.
06	**Structured Data and Machine Readability**	Whether the website uses comprehensive schema markup and structured data to communicate key information to machines in the precise format they require. This is the technical language AI systems use to understand businesses at scale.
07	**Local and Contextual Relevance**	Whether the business has established geographic and contextual relevance for the specific markets it serves. Local AI citations are

		increasingly the first point of contact between a potential customer and a business.

SECTION 5: AN ANONYMISED AUDIT SNAPSHOT

What an OPTIMUM Audit Reveals

The following is drawn from a real OPTIMUM audit conducted on a well-established UK business trading in a high-consideration consumer sector. All identifying details have been removed. The scores and findings are genuine. This business was not an outlier. It was, in every measurable respect, representative of the average.

It had invested consistently in its website, maintained an active social media presence, and held a reasonable number of Google reviews. By conventional measures, it was digitally competent. By the measure of AI visibility, it was largely invisible.

Dimension	Score	Status	Key Finding
Technical Foundation	**6 / 10**	**Mid**	Site crawlable but slow on mobile. Render-blocking scripts inhibit AI crawler access to key service pages.
Content Quality / E-E-A-T	**4 / 10**	**Low**	Content generic and promotional in tone. No demonstration of genuine expertise. No named authors, credentials, or primary insight.
Entity and Brand Clarity	**5 / 10**	**Mid**	Business name, location, and trading category inconsistently presented across web properties and directories.
Topical Authority	**4 / 10**	**Low**	Thin coverage of sector-relevant topics. No content cluster structure. AI systems have insufficient signal to associate this business with its core subject matter.
Trust and Credibility Signals	**7 / 10**	**Good**	Reasonable volume of Google reviews. Listed on two relevant industry directories. No press coverage or third-party citations identified.
Structured Data / Machine Readability	**3 / 10**	**Low**	No schema markup implemented. Business type, opening hours, services, and geographic coverage not communicated in machine-readable format.
Local / Contextual Relevance	**6 / 10**	**Mid**	Google Business Profile present and accurate. No localised content strategy. Insufficient geographic signals for multi-location authority.

Overall OPTIMUM Score	Priority Remediation Actions

5.0 / 10 *Below the 7/10 threshold OPTIMUM audit data associates with reliable AI citation across major platforms*	• Implement schema markup across all key pages (immediate) • Rebuild core service pages with E-E-A-T content architecture • Establish entity consistency across all directories and profiles • Develop a topic cluster strategy aligned to buyer intent queries • Resolve mobile performance issues inhibiting crawler access

This business was not, by any reasonable standard, neglecting its digital presence. It was simply operating to rules that no longer fully apply. The remediation actions identified are not beyond reach, but they are sequential and interdependent: each step below establishes a precondition the next step depends on, which is why remediation cannot be reordered or run in parallel without loss of effect. That is precisely the gap OPTIMUM is designed to bridge.

1 Resolve mobile / crawler access	→	2 Implement schema markup	→	3 Fix entity consistency	→	4 Rebuild E-E-A-T content	→	5 Build topic clusters

Each stage depends on the one before it. Schema markup describing an entity that is not yet consistent simply encodes the inconsistency. Content rebuilt before entity clarity is fixed inherits the same ambiguity. This is why OPTIMUM remediation is sequenced, not simply prioritised.

SECTION 6: THE OPPORTUNITY

Being Cited Is Worth More Than Ranking

The businesses that adapt are not simply defending against loss. They are capturing a disproportionate share of a traffic stream that converts at rates significantly above traditional organic search.

Research from Seer Interactive found that brands cited within AI Overviews earn 35 per cent more organic clicks than competitors who are not cited. Semrush reports a 4.4 times lift in conversion rate from AI-referred traffic compared with standard organic visitors. Separate analysis from Ahrefs documented a 23 times conversion premium in a specific case study.

The reason is straightforward. A user who arrives at your website via an AI citation has already received an AI-validated endorsement of your authority on that subject. They arrive with a higher level of intent and trust than the average search visitor.

> ***Brands cited in AI Overviews earn 35% more organic clicks than competitors who are not cited.***
>
> Seer Interactive, 2025.

There is also a structural point worth noting. The overlap between traditional Google rankings and AI citations is collapsing. By early 2026, between 62 and 83 per cent of AI citations were drawn from pages that do not rank in the top ten organic results. A business that invests in GEO optimisation now is building a separate channel of visibility that operates independently of traditional SEO ranking.

Domains with substantial brand mentions on Quora and Reddit have approximately four times higher AI citation probability. Presence on platforms such as Trustpilot and Yelp increases ChatGPT citation likelihood by three times compared with sites without such profiles. These are not abstract technical concerns. They are measurable advantages that can be built deliberately, with the right audit process and content strategy in place.

Generative AI traffic is growing 165 times faster than organic search traffic according to WebFX analysis published in June 2025. ChatGPT is now sending more referral traffic than Reddit and LinkedIn combined. The volume is still modest relative to Google's overall scale, but the trajectory is unambiguous.

From Comprehension to Action

Understanding the problem is necessary but not sufficient. The businesses that will benefit from the AI search transition are those that move from comprehension to action, and do so with a structured plan rather than a reactive series of tactical adjustments.

State of the Art Digital offers two engagement routes for businesses that wish to address their AI visibility with the seriousness the situation warrants.

Stage One: AI Risk Intelligence Briefing

A focused advisory in which we assess your current AI visibility exposure, identify the highest-priority gaps against the OPTIMUM framework, then present a clear picture of where your business stands relative to competitors in your sector. The briefing is the logical starting point for any business that has not yet assessed its AI readiness. This report produces a clear basis for informed decision-making.

Stage Two: Retained Advisory

Ongoing strategic advisory, typically commencing after the AI Risk Intelligence Briefing, in which we guide the implementation of OPTIMUM recommendations, monitor AI visibility performance, and adapt strategy as the platform landscape evolves. The retained relationship is structured around your business's specific sector, scale, and competitive context.

> ***The question is not whether to act. The question is how long inaction will be affordable.***

AI search is not a passing trend. ChatGPT more than doubled its weekly active users from 400 million to 900 million between February 2025 and February 2026. Google's AI Mode surpassed 1 billion monthly users by mid-2026, with query volume more than doubling each quarter. These are structural shifts in behaviour, and they compound. The businesses that establish AI visibility now will be increasingly difficult to displace. Those that defer will find the gap widening with every month.

State of the Art Digital was established to provide independent, expert guidance through exactly this kind of transition. The practice is built on four principles: experience accumulated across four decades of commercial marketing; intelligence gathered through continuous research into AI search behaviour; judgement applied without the conflicts of interest that characterise agency relationships; and independence from platform providers, tool vendors, and technology resellers.

Begin with a conversation

To discuss an AI Risk Intelligence Briefing for your business, contact Steve Coulter directly.
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APPENDIX: GLOSSARY OF KEY TERMS

Key Terms Explained

The following definitions are provided for readers who are encountering the terminology of AI search for the first time.

Term	Definition
AI Overview (AIO)	A summary generated by Google's AI and displayed at the top of search results. When present, it answers the query before the user sees any organic links, significantly reducing click-through to individual websites.
AI Mode	Google's conversational search experience, powered by Gemini, in which users interact with an AI rather than a traditional list of links. Zero-click rates in AI Mode reach 93 per cent.
AEO (Answer Engine Optimisation)	The practice of structuring content to be surfaced by AI answer engines, including ChatGPT, Perplexity, and Google's AI features, rather than merely to rank in traditional search results.
Citation	In AI search, a citation is a reference by an AI system to a specific source when generating an answer. Being cited is the AI-era equivalent of ranking in position one on Google.
E-E-A-T	Experience, Expertise, Authoritativeness, and Trustworthiness. Google's framework for assessing content quality, now a critical factor in AI citation decisions across all major platforms.
Entity	In the context of AI and search, an entity is a clearly defined, unambiguous thing: a business, a person, a place, a product. AI systems reason about entities rather than keywords.
GEO (Generative Engine Optimisation)	The emerging discipline of optimising content and digital presence for inclusion in AI-generated answers. GEO extends and, in some respects, supersedes traditional SEO practice.
OPTIMUM	State of the Art Digital's proprietary seven-dimension framework for auditing and improving AI search visibility. Assesses Technical Foundation, Content Quality and E-E-A-T, Entity and Brand Clarity, Topical Authority, Trust and Credibility Signals, Structured Data and Machine Readability, and Local and Contextual Relevance.
Schema Markup	Structured code, typically in JSON-LD format, that communicates information about a business to search engines and AI systems in a machine-readable format. Absence of schema markup is one of the most common findings in OPTIMUM audits.

SEO (Search Engine Optimisation)	The established practice of improving a website's visibility in traditional search engine results. SEO remains relevant but must now be practised alongside GEO and AEO strategies.
Topical Authority	A measure of how comprehensively and consistently a business addresses the topics most relevant to its sector. AI systems favour sources that demonstrate depth of knowledge over a coherent subject area.
Zero-Click Search	A search that ends without the user clicking through to any website, because the answer is delivered directly on the results page, typically by an AI feature. Zero-click rates now exceed 80 per cent when AI Overviews are present.

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Zero-Click and Traffic Decline Data

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SparkToro / Similarweb (2024 to 2026). Zero-click search growth from 60.45 per cent in 2024 to 68.01 per cent between January and April 2026, the fastest two-year acceleration on record. AI Overview queries show 83 per cent zero-click rate versus 60 per cent for standard queries.

BrightEdge (2025 to 2026). Top-10 organic to AI Overview citation overlap collapsed from approximately 75 per cent in mid-2025 to between 17 and 38 per cent by early 2026. 400 per cent increase in citations from positions 21 to 30. 49 per cent year-on-year increase in impressions alongside 30 per cent drop in average CTR, May 2025.

AI Overview Reach and CTR Impact

A note on the figures below: coverage estimates in this section range from around 13% to over 60% depending on source. This is not a contradiction between sources so much as a difference in what each measures, all-query samples versus *informational-only samples, single-market versus global panels, and differing crawl and sampling methodology. Google's own February 2026 disclosure of approximately 48-50% of US queries is treated throughout this report as the primary reference figure; other percentages below are retained for their specific, narrower context.*

Psyke / Seer Interactive (2025). Organic CTR for informational queries featuring Google AI Overviews fell 61 per cent since mid-2024. Paid CTRs on the same queries fell 68 per cent. Source: psyke.co/google-ai-overviews-statistics

Digital Applied (March 2026). AI Overviews appear in approximately 13 per cent of all Google queries globally as of Q1 2026, up from under 5 per cent during the initial rollout. Position 1 CTR drops 18 per cent when AI Overview appears; positions 3 to 10 see 50 to 70 per cent CTR declines. Source: digitalapplied.com/blog/ai-overviews-13-percent-queries-seo-traffic-impact

Ahrefs (November 2025). AI Overviews appear in 99.9 per cent of informational keywords. Real Estate sector has 5.8 per cent AI Overview share. Shopping sector has 3.2 per cent.

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SE Ranking (November 2025). Domains with over 32,000 referring domains are 3.5 times more likely to be cited by ChatGPT. Domains with substantial Quora and Reddit mentions have approximately 4 times higher citation probability. Presence on Trustpilot, G2, Capterra, Sitejabber, and Yelp increases citation likelihood by 3 times.

WebFX (June 2025). Gen AI traffic is growing 165 times faster than organic search traffic.

AirOps (March 2026). 43.2 per cent of pages ranking number 1 in Google are cited by ChatGPT. Pages at position 1 have a 58 per cent chance of being cited; by position 10 that drops to 14 per cent.

OPTIMUM Proprietary Data

State of the Art Digital OPTIMUM Audit Data (Q4 2024 to Q2 2026). Proprietary audit findings across UK automotive retail and residential estate agency sectors. Average readiness score of 5.5 out of 10 across all audited businesses. No business audited had previously conducted a structured AI visibility assessment.

About State of the Art Digital

State of the Art Digital is an independent AI search and GEO consultancy led by Steve Coulter, a sales and marketing strategist with four decades of experience across automotive retail, finance, and consumer sectors. The practice specialises in AI visibility strategy, OPTIMUM auditing, and retained advisory for businesses in automotive, estate agency, and UK SME markets.

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