

THE INVISIBLE SHORTLIST

HOW AI SEARCH IS RESHAPING THE
HOME IMPROVEMENT BUYER JOURNEY

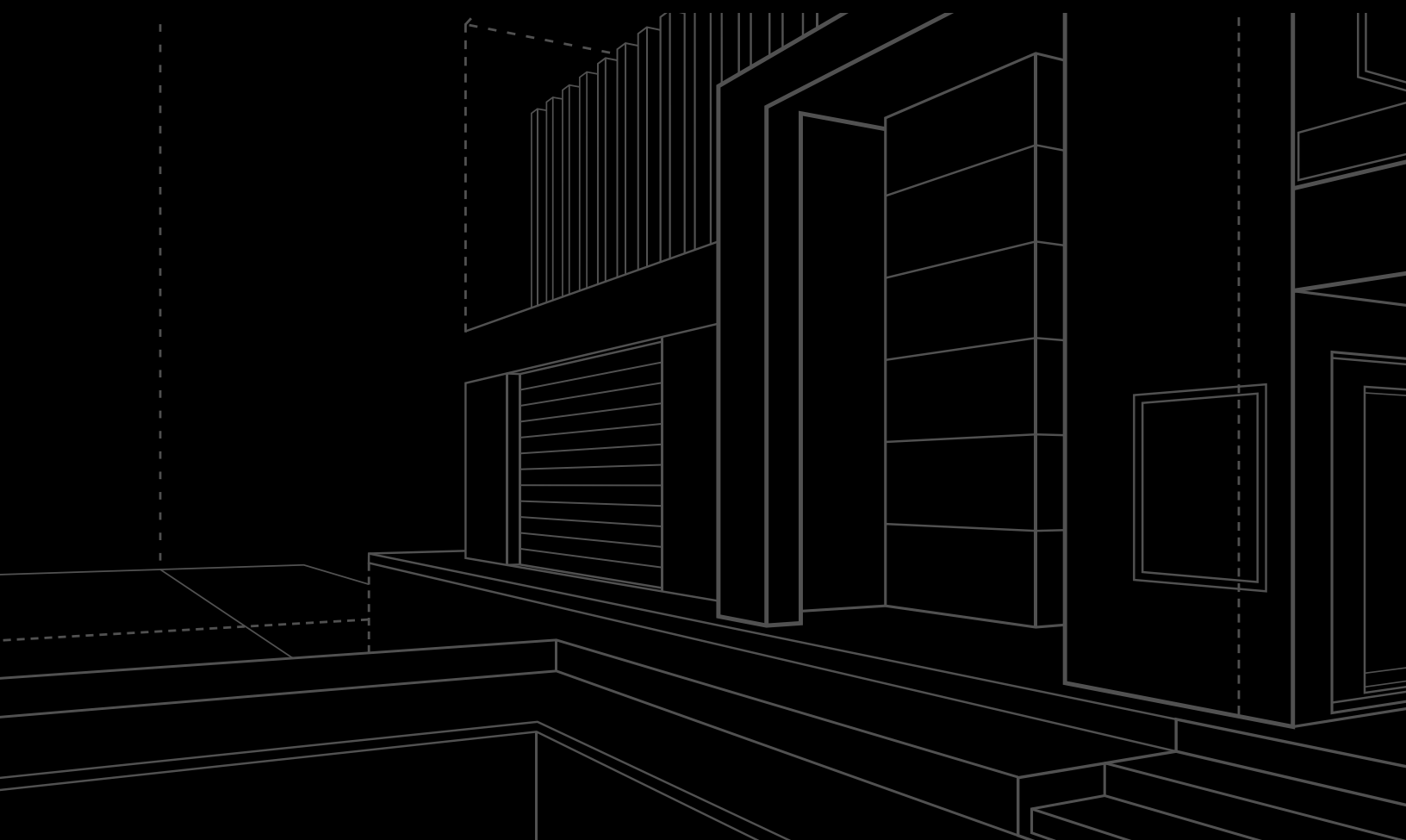
68%

of Google searches
now end without a click.

**Is your brand part of
the answer?**

TABLE OF CONTENTS WITH EXHIBITS

Executive Summary	3
The Buyer Journey Is Becoming Invisible.....	4
SEO Still Matters but It Is No Longer the Whole Job	7
Digital Discovery Can Make Physical Sales Stronger, Not Complete	9
Your Website Cannot Establish Your Reputation by Itself	11
Make Your Content Expertise Readable and Valuable	12
Human Experience Turns Signals into a Unified Story	15
Action Plan/The First 90 Days	16



EXECUTIVE SUMMARY

Your website traffic may be falling. That does not mean your customers have stopped researching.

It means more of that research is happening somewhere else.

Search engines are increasingly answering questions directly in their AI answers without sending traffic to a website link. Homeowners, contractors and purchasing teams are asking ChatGPT, Google AI Overviews, Perplexity and other AI-powered tools to compare products, explain technical differences, interpret specifications and recommend solutions. Instead of giving the buyer a list of links to investigate, these systems increasingly do the investigation for them.

For home improvement and building products manufacturers, that changes the definition of digital visibility.

It is no longer enough to rank well for a keyword. Your product information has to be understandable to machines. Your claims have to be supported by sources those machines trust. And your brand has to appear consistently across the wider ecosystem of retailers, trade media, experts, customers, social platforms and real-world experiences from which AI systems build their answers.

Reputation is the new ranking.

The manufacturers that adapt will not simply generate traffic. They will earn consideration before the buyer ever reaches a website, showroom or sales representative.



1

THE BUYER JOURNEY IS BECOMING INVISIBLE



For years, marketers had a relatively straightforward way to observe digital demand. Someone searched. Google returned links. The buyer clicked. Analytics recorded the visit.

From there, marketers could follow the trail. They could see which keywords brought people in, which pages held their attention, and which paths led to a quote request, a dealer lookup or a purchase. Every step left a signal. Rankings could be tracked. Traffic could be attributed. Budgets could be defended with data.

It was never a perfect picture, but it was a visible one. That model made the website the center of the digital customer journey.

AI search breaks that connection

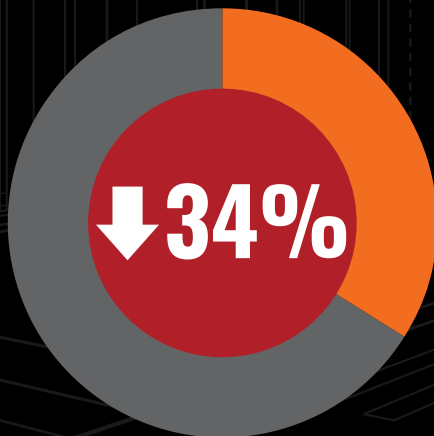
A buyer can now ask a highly specific question like Which insulation products meet the requirements

for a coastal commercial project? What flooring is appropriate for a high-moisture basement? Which HVAC system makes sense for this application? and receive a synthesized answer without visiting most of the websites used to create it.

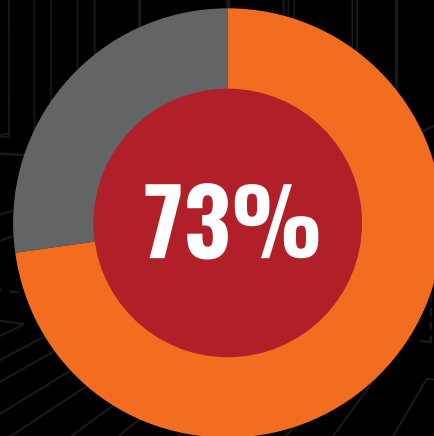
The result is a potentially unsettling combination for marketers: less traffic and visibility into customers, but not necessarily less research or purchase intent.

B2B data shows the scale most clearly, but the same shift is reaching homeowners and pros alike. Traditional B2B organic traffic declined an average of 34% from 2024 to 2025, while zero-click behavior means a significant share of searches can now end without a visit to an external website. 73% of B2B buyers now use AI tools for vendor research, yet the median B2B brand appears in just 3% of relevant AI Overviews.

Traditional B2B Organic Traffic



B2B Buyers Using AI Research



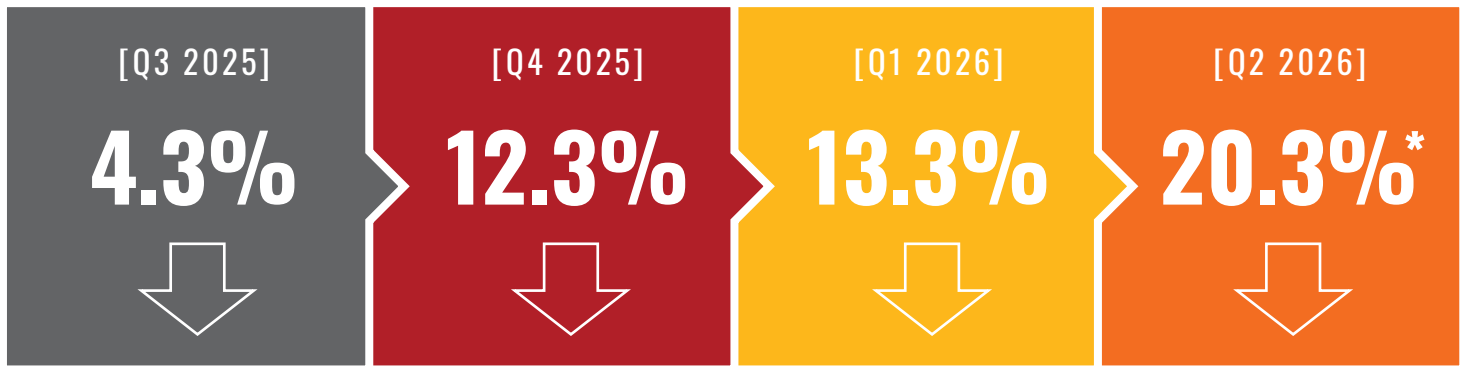
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TRADITIONAL B2B ORGANIC TRAFFIC

The decline is not leveling off. Quarter over quarter, traditional B2B organic traffic losses have grown steeper, reaching 20.3% in a single quarter by Q2 2026.



* in a single quarter (representing the steepening decline referenced in the text).

THE DISAPPEARING CLICK

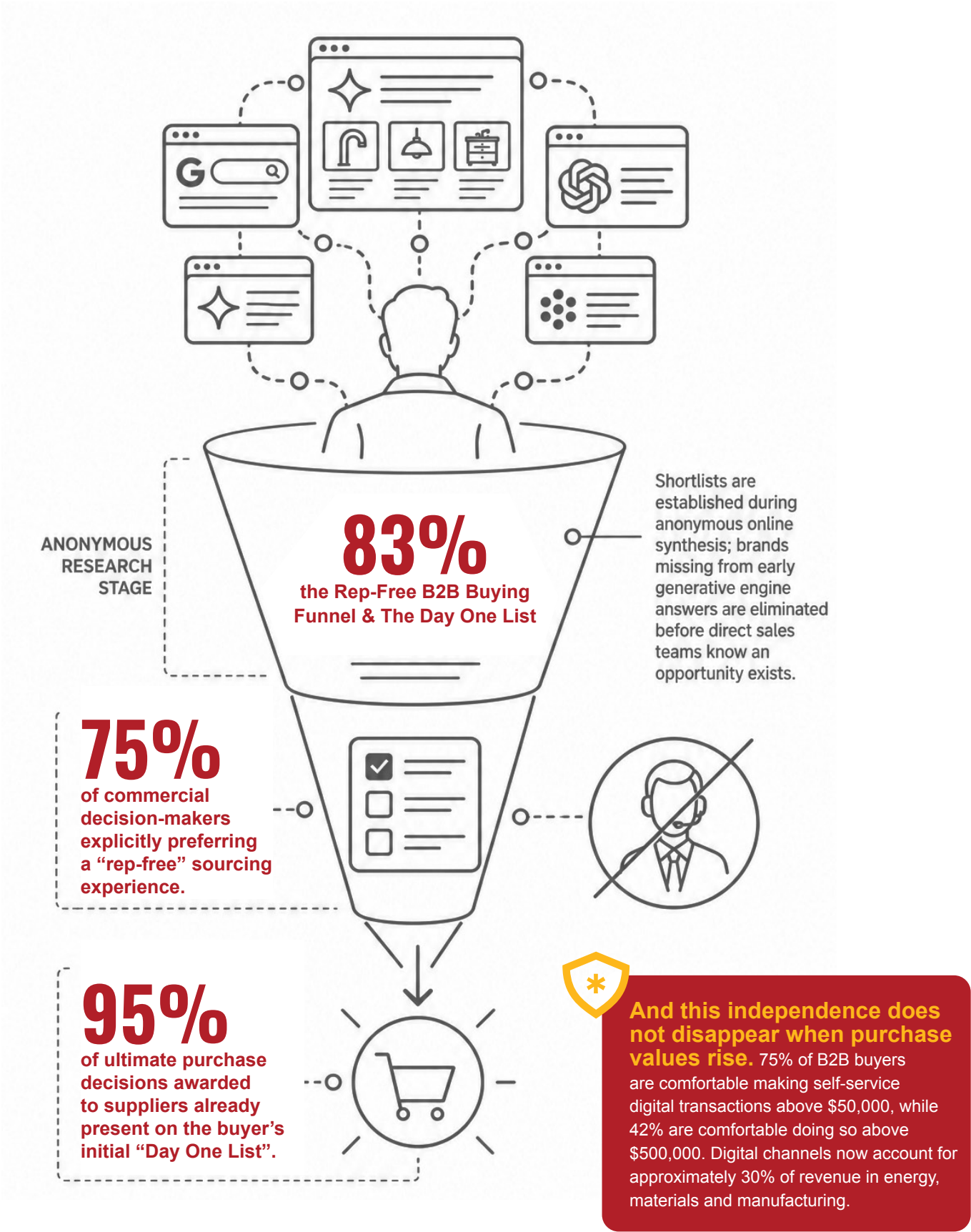
Behind those losses is a simple change in behavior: more searches now end on the results page. Across devices, query types and AI search modes, the click is disappearing.

MARKET DISCOVERY METRIC	VALUE/SHARE	PRIMARY RESEARCH SOURCE
Prediction for share of B2B buying that will be AI agent-intermediated.	90%	Gartner Forecast ¹
Average organic traffic loss for B2B websites between 2024-2025.	34.0%	Onely / ABM Agency ¹
B2B domains that lost traffic between 2024-2025	73%	ZipTie
General Google zero-click search share	68.01%	SparkToro / Similarweb ⁸
Mobile zero-click search rate (representing >60% of searches)	77.2%	SparkToro / Datos ¹
Mobile zero-click rate specifically for informational queries	84.0%	Digital Applied ⁹
Organic click-through rate (CTR) decline when AI Overviews appear	61.0%	Seer Interactive ¹
Zero-click rate for queries within Google AI Mode	93.0%	Semrush Intent Study ⁸
Conversational search engine year-over-year growth rate	340.0%	Similarweb Generative Index ⁹

This matters even more because B2B buyers increasingly want to conduct research independently. Buyers spend roughly 83% of the purchase journey on independent research, with 75% preferring a rep-free buying experience. The same research indicates that 95% of final purchase awards go to suppliers already present on the buyer’s initial “Day One List.”

That changes the role of marketing
The most consequential moment may occur before a salesperson knows the prospect exists. If a homeowner, architect, contractor, channel partner or purchasing manager asks an AI engine to identify appropriate products and your brand is absent from the answer, you may never have an opportunity to make the case later.

THE REP-FREE B2B BUYING FUNNEL & THE DAY ONE LIST



Homeowners shortlist the same way: more than half of in-store home improvement purchases start with online research.

DIGITAL COMFORT SCALES WITH THE BUYER

SELF-SERVICE BUYING IS NO LONGER CONFINED TO LOW-COST PURCHASES

\$50,000+
order value



75%

\$500,000+
order value



42%

THE IMPLICATION IS SIMPLE:

Do not interpret declining website traffic in isolation.



30%
of revenue
now digital.

ASK A DIFFERENT QUESTION:

When buyers research our category without visiting us, are we still part of the answer?

2

SEO STILL MATTERS BUT IT IS NO LONGER THE WHOLE JOB.



The shift to AI search has created an alphabet soup of new terminology acronyms. Three terms matter most: SEO, AEO and GEO.

SEO, or Search Engine Optimization, helps traditional search engines discover, index and rank your pages. AEO, or Answer Engine Optimization, structures information so an engine can confidently extract a direct answer to a straightforward question.

GEO, or Generative Engine Optimization, addresses a more complex challenge: helping generative AI

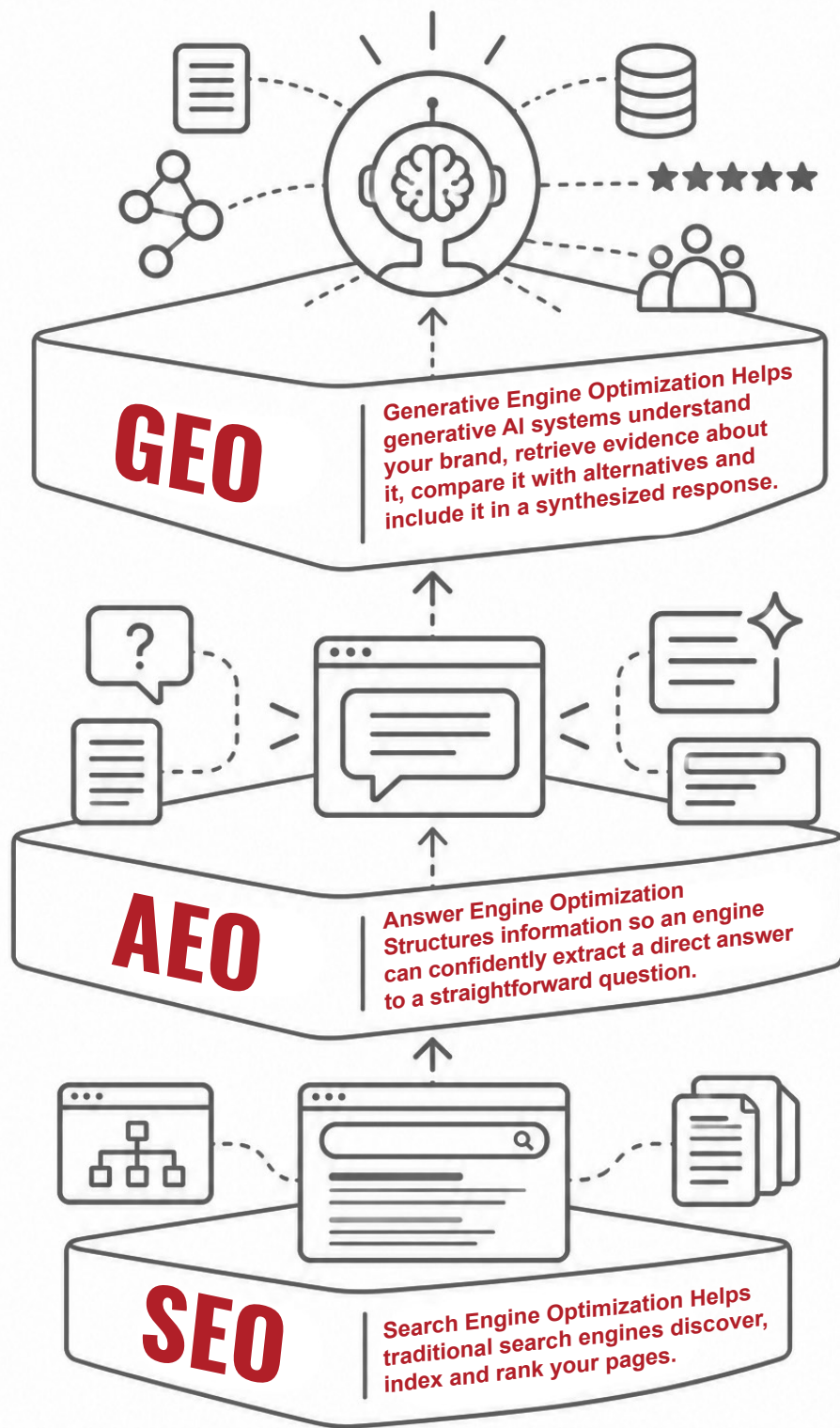
systems understand your brand, retrieve evidence about it, compare it with alternatives and include it in a synthesized response.

These are not three competing strategies. They are layers of the same discovery system: SEO's emphasis on rankings and click-through traffic, AEO's emphasis on concise conversational answers, and GEO's emphasis on brand citations, recommendations and interpretation across generative outputs.



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THE DISCOVERY STACK: SEO VS. AEO VS. GEO



Why does that distinction matter for manufacturers? Because AI search does not simply match one query to one webpage. For complex questions, generative systems can break a request into smaller questions, retrieve information from multiple sources and synthesize those sources into one response.

Consider a contractor researching exterior cladding for a home a mile from the ocean. The underlying information need might involve resistance to salt air and humidity, wind load ratings, installation requirements, code compliance, warranty coverage in coastal zones, local availability and price. The AI system can look for evidence addressing each part of that decision.

It may pull code compliance from a third-party evaluation report, warranty terms from a PDF buried deep on your site, and availability from a dealer page that hasn't been updated in two years. If your strongest evidence is locked in spec sheets and distributor listings, the AI will build its answer from whatever it can find, and that may be a competitor's clearly written product page.

The shift is no longer about one page ranking for one query. AI search synthesizes many sources across many sub-questions, so visibility depends on how consistently you show up across that broader evidence ecosystem. Your brand wins when the evidence needed to answer the buyer's question is easy to retrieve, interpret and verify.

That means marketing teams need new visibility metrics as well. Keyword rankings and organic sessions remain useful, but brands should increasingly monitor questions such as: How often are we mentioned in AI answers? Which sources are cited when we are mentioned? Are our products accurately represented? Which competitors appear when we do not? Did we become a part of the answer?

3

DIGITAL DISCOVERY CAN MAKE PHYSICAL SALES STRONGER, NOT COMPLETE.



Home improvement is not becoming purely digital

HIRI research shows that more than half of in-store home improvement purchases are preceded by online research. Digital discovery and physical commerce are therefore not separate journeys. They are stages of the same one.

That relationship becomes especially important as product complexity increases.

A buyer may comfortably purchase standardized hardware online. But costly aesthetic or technically complex products often require physical verification. Buyers want to see a finish, touch a material, confirm dimensions, talk with an expert or validate that a product will work in the actual environment.

Digital content should make that physical decision easier.

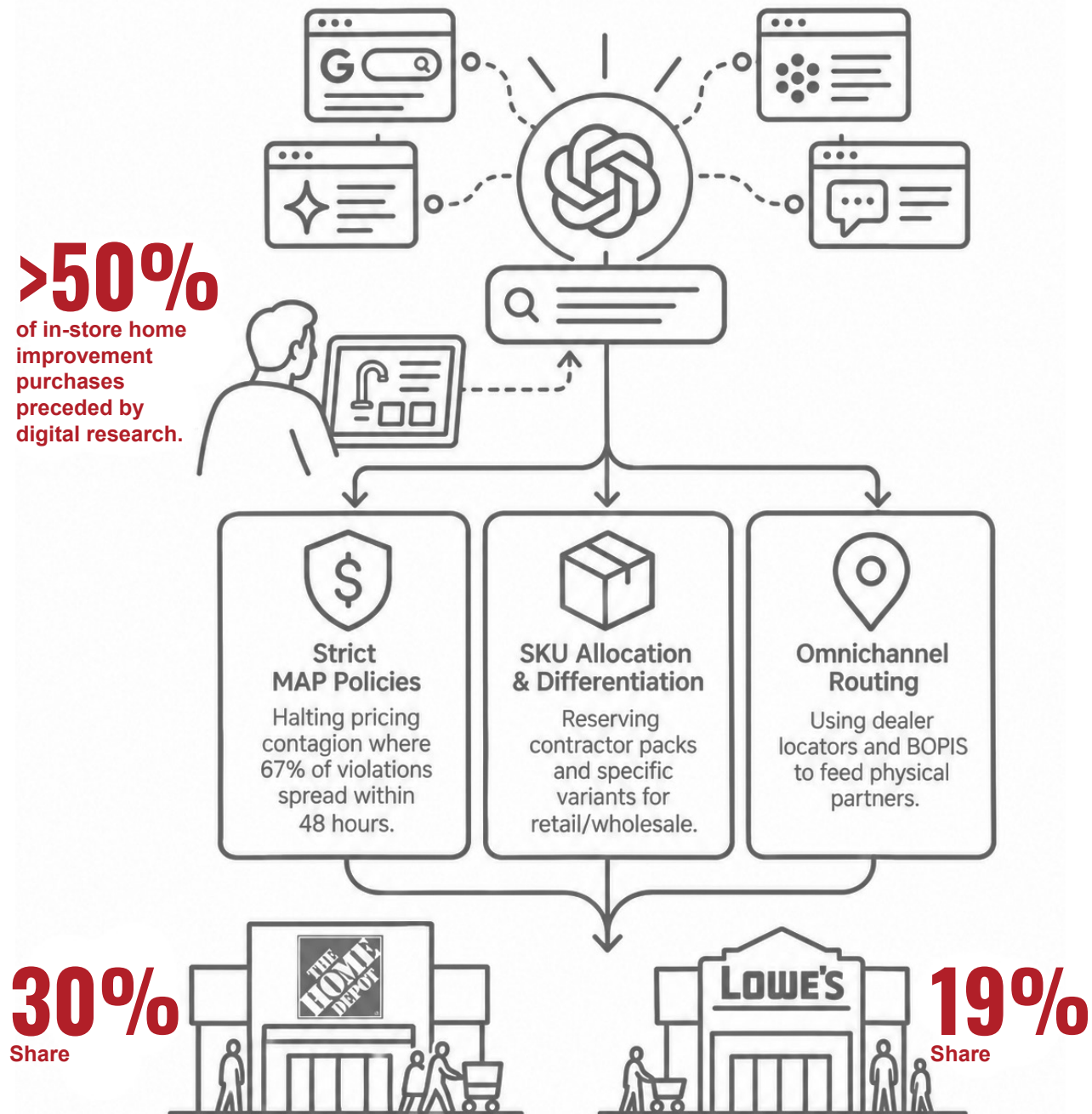
For manufacturers, this creates a critical strategic constraint. Winning more visibility in AI search cannot mean bypassing the retailers, distributors, dealers and installers responsible for fulfilling demand. The better objective is to make AI visibility a channel asset.

That can include maintaining disciplined Minimum Advertised Price policies, differentiating SKUs or contractor packs where appropriate, and creating strong store locators, dealer finders and Buy Online, Pick Up In-Store pathways that move digitally generated demand into the correct channel

CHANNEL INTEGRATION FRAMEWORK: TRANSFORMING AI DISCOVERY INTO DEALER DEMAND

>50%

of in-store home improvement purchases preceded by digital research.



30%
Share

19%
Share

This is particularly important because AI systems can expose inconsistencies that marketers once treated as separate channel problems. If the manufacturer's website says one thing, a retailer says another and a distributor carries an outdated specification, the buyer no longer has to discover those discrepancies manually. An AI engine can encounter all three, and will weaken information about your brand without a reliable conclusion. Omnichannel consistency is therefore becoming more than a customer-experience principle. It is part of your information architecture.

Generative search visibility should not disintermediate distribution; it should serve as a routing engine driving qualified leads to physical partners.



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4

YOUR WEBSITE CANNOT ESTABLISH YOUR REPUTATION BY ITSELF.



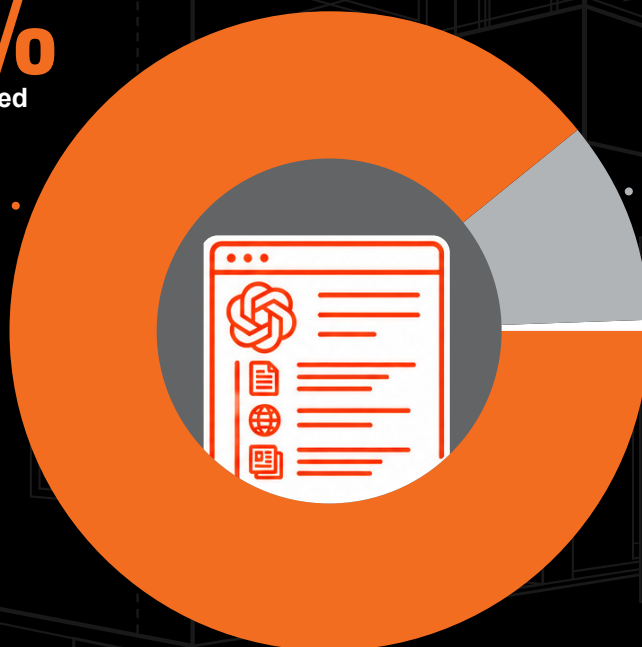
Making information readable is only half the challenge. AI systems also need reasons to trust it.

This is where GEO becomes inseparable from brand, communications, PR, social media and experiential marketing.

There is a dramatic difference between owned and external information in AI citations: third-party sources account for most citations in the cited research, while owned brand websites represent a much smaller share.

AI CITATION SHARE: EARNED VALIDATION VS. OWNED SITES

82%-89%
of generative AI citations sourced from third-party earned media and trade coverage.



5%-10%
of citations sourced from owned corporate websites

0.3%
of citations sourced from paid or advertorial placements.

External PR distribution delivers a
+239% to +325%
median lift in AI citation rates over self-publishing

This changes the strategic value of PR, social media, influencers, experiential, and other channels to influence your reputation.

A trade publication article featuring an engineer's expertise is not simply awareness. A third-party product review is not simply consideration content. A contractor explaining an installation is not simply social engagement.

Each becomes another independent piece of evidence that a brand exists, possesses expertise and can credibly make a particular claim.

The same logic applies to social and video. Research identifies YouTube and LinkedIn as particularly important domains in AI discovery. For manufacturers, that makes expert-led demonstrations, installation walkthroughs, stress tests, project documentation and employee thought leadership more valuable when the underlying information is clear and crawlable.

Experiential marketing belongs in this system too.

A strong experience does not end when attendees leave. A contractor event, product demonstration, installer program or customer experience can generate expert commentary, customer stories, videos, social posts, dealer content, reviews, earned coverage and user-generated content.

The physical experience creates the proof. Digital channels distribute it. Search engines discover it. AI systems encounter the resulting network of corroboration.

That is why reputation is the new ranking. The objective is not to manufacture mentions everywhere. It is to create useful, authentic evidence in the places where customers and credible third parties naturally talk about your brand.

5

MAKE YOUR CONTENT EXPERTISE READABLE AND VALUABLE.



Manufacturers already possess enormous amounts of valuable information.

The problem is often where that information lives. Technical specifications, installation instructions, testing results, compliance documentation and product comparisons frequently sit inside PDFs. Those documents work well for downloading, printing and sharing. They can work much less well as the only location for information an AI system needs to retrieve.

Scanned pages, image-based tables, multi-column layouts and inconsistent formatting can be barriers to clean extraction.

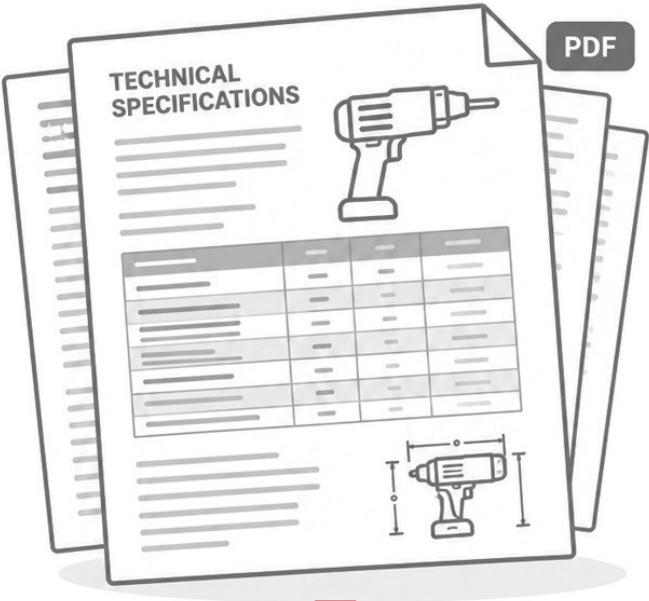
The solution is not to eliminate PDFs, but to stop making the PDF the only authoritative source.

Put critical specifications directly on product pages. Build actual HTML tables instead of images of tables. Add plain-language explanations describing what a product does, where it should be used, what problem it solves and under what conditions it performs.

FROM HUMAN-READABLE TO MACHINE-READABLE

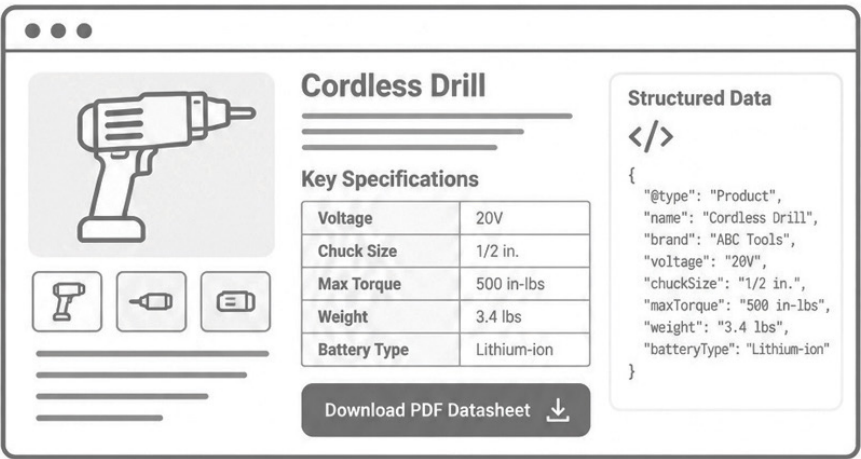
BEFORE

Information buried in a PDF



AFTER

The same information, made readable and valuable.



Structured data can strengthen that foundation.

JSON-LD is structured code that labels information so machines can more easily identify what each piece represents: a product, SKU, dimension, service, FAQ or other entity. Product, Service and FAQ Page schema can therefore help machines map information that a human reader understands intuitively.

An llms.txt file can also be effective. It's a simple directory intended to point AI systems toward authoritative resources. Think of it as a signpost showing machines where your most important product, specification and certification information resides.

But structure alone is not enough. Research has found substantial relative visibility improvements from owned content containing expert quotations, concrete statistics and authoritative citations. Research shows lifts of approximately 41% for expert quotations, 32–37% for statistical data and 30–40% for authoritative citations.

Keep the downloadable document. But give machines an authoritative web version of the facts inside it.



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WHAT MAKES CONTENT MORE VISIBLE TO GENERATIVE ENGINES?

**EXPERT
QUOTATIONS**

+41%

**CONCRETE
STATISTICS**

**+32-
37%**

**AUTHORITATIVE
CITATIONS**

**+30-
40%**

The same practices that make technical content credible to people can also improve its visibility in generative search.

**REPLACE “INDUSTRY-LEADING PERFORMANCE”
with the MEASURED PERFORMANCE**

**REPLACE “BUILT TO THE HIGHEST STANDARDS”
with the RELEVANT STANDARD**

**REPLACE “ANONYMOUS CORPORATE EXPERTISE”
with the NAMED ENGINEER WHO CAN EXPLAIN WHY THE SPECIFICATION MATTERS**

The goal is not more content. It is more verifiable content.

6

HUMAN EXPERIENCE TURNS SIGNALS INTO A UNIFIED STORY.



AI search rewards machine-readable information, but **human experience creates the proof behind it**. For home improvement and building products manufacturers, that proof is generated in showrooms, job sites, contractor trainings, demonstrations, dealer events and customer communities.

A strong experience also extends far beyond the event itself. A product demonstration or event with your customers can generate expert commentary, customer stories, video, social content, reviews, dealer assets and earned coverage—creating

multiple credible signals that reinforce the same brand story.

The opportunity is to intentionally connect these experiences across channels. **The physical experience creates the proof. Digital channels amplify it. Search and AI make it discoverable.**

When those signals tell a consistent story, they strengthen both human trust and machine understanding. In the AI search era, experiential marketing is not separate from digital discovery; it helps create the reputation that drives it.

WHAT SHOULD YOU DO FIRST?

AI search can feel like another massive digital-transformation project. It does not have to begin that way. For most home improvement and building products manufacturers, the first steps are concrete.

1

DO YOU KNOW WHAT AI SAYS ABOUT YOU?

When a homeowner or contractor asks ChatGPT about your category, do you know whether your brand appears, how it's described and which competitors show up instead?

2

CAN A MACHINE READ YOUR PRODUCT FACTS?

Could an AI system find your specs, certifications and performance data without opening a PDF?

3

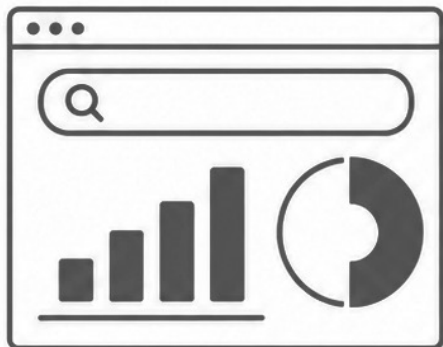
DOES EVERYONE TELL THE SAME STORY?

Do trade press, retailers, dealers, reviewers and installers describe your products the way you do?

IF YOU ANSWERED "NOT SURE" TO ANY OF THESE, START WITH THE PLAN ON THE NEXT PAGE.

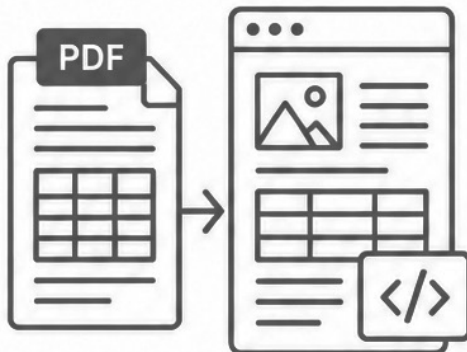
ACTION PLAN: YOUR FIRST 90 DAYS

DAYS 1 TO 30 GET YOUR BASELINE



- ✓ Measure AI citations and share of voice.
- ✓ Pick your priority product lines and pages.
- ✓ Identify your expert voices.

DAYS 31 TO 60 FIX THE FOUNDATION



- ✓ Convert critical PDF data to web content.
- ✓ Deploy the right schema.
- ✓ Align retailer and dealer product facts.

DAYS 61 TO 90 BUILD THE PROOF



- ✓ Create demonstration content.
- ✓ Launch an earned-media plan.
- ✓ Connect experiential programs to content capture.
- ✓ Re-measure against your baseline.

“

These are not isolated SEO tasks. They require marketing, communications, e-commerce, product, IT and channel teams to work from the same set of facts. That coordination may ultimately become one of the biggest competitive advantages of AI search.”

Jess Van Wagenen, SVP Client Strategy, Adcom



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REPUTATION IS THE NEW RANKING

The shift from search engines to answer engines does not make your website irrelevant. It changes its job. Your website must increasingly operate as an authoritative source of structured product truth.

Your wider marketing ecosystem must provide independent evidence that validates that truth. Your channel strategy must convert discovery into the right physical or digital purchase path. And your customers, experts, retailers, contractors and

partners increasingly contribute to the reputation that surrounds all of it. The manufacturers that win will not be those that simply produce the most content or chase every new AI tactic. They will be the brands that make themselves easy to understand, easy to verify and easy to recommend.

That is the new search roadmap. And it begins well before the click.

FIND OUT WHERE YOU STAND

We've made one point abundantly clear: brands absent from the AI-generated answer are absent from the sale, often before a salesperson or store associate even knows the opportunity existed.

The question is no longer whether your brand ranks. It is whether your brand is cited, understood and recommended by the systems buyers now trust to do their homework for them.

Adcom built the AEO Visibility Score to answer that question directly. It is a free, no-obligation snapshot of how your brand currently shows up — and where it does not — across the AI search landscape described in this paper.

YOUR SCORE BENCHMARKS FOUR DIMENSIONS:

- **AI Citation Visibility** — how often, and how favorably, your brand is cited by ChatGPT, Google AI Overviews, Perplexity and other AI tools compared to your named competitors.
- **Machine-Legible Readiness** — whether your product specifications, certifications and technical data are structured for AI retrieval, or trapped inside static PDFs AI systems cannot parse.
- **Third-Party Authority** — the volume and quality of earned media, trade press and independent sources validating your claims, since these, not your own website, drive most AI citations.
- **Human & Channel Trust Signals** — how consistently your brand's story holds together across retail partners, social platforms, video and real-world experience.



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