

THE 3% TRAP

**Your dashboard sees 3%.
Our model says AI redirects 76% of
high-ACV SaaS pipeline.**

76% is a directional cross-study model, not observed CRM attribution.

**Why high-value B2B SaaS is treating its biggest
discovery shift since inbound like an SEO
experiment, and what CMOs should fund now.**

A review of 221 AI visibility research publications and reports, plus new analysis of Semrush respondent-level B2B buyer data.

TOMAS SELIOKAS
B2B SaaS CMO and former Similarweb marketing leader

The evidence changed my view.

Why I did this study, and why I am making the case more strongly now.

For two years, CMOs and CEOs kept asking me the same question: is AI visibility important enough to fund properly, or is it another SEO trend wrapped in new language?

My answer used to be cautious. Install a visibility dashboard. Review what the models say about your brand. Run a few experiments beside SEO. I could not justify much more than that.

I do not work for an AI visibility vendor. I do not sell the software or the optimisation package. I reviewed the evidence because I was tired of giving CMOs an answer I could not fully stand behind.

The evidence now supports a different recommendation: for high-value B2B SaaS, AI visibility is a market-access priority, not an SEO side project.

AUTHOR VIEW

Tomas Seliokas, after reviewing the evidence base

This is an editorial conclusion, not a vendor claim or a promise of guaranteed revenue.

The boardroom answer

Five statements are enough to change the budget conversation.

- 1 Your dashboard sees 3%. Our model says AI redirects roughly three quarters of high-ACV SaaS pipeline.
- 2 Your biggest AI loss will look like a deal Sales never knew existed.
- 3 The more money at stake, the deeper AI moves into the decision.
- 4 AI does not need to create the shortlist to decide who survives it.
- 5 Stop managing a market-access shift like an SEO experiment.

86% to 90%

AI materially involved

76% to 79%

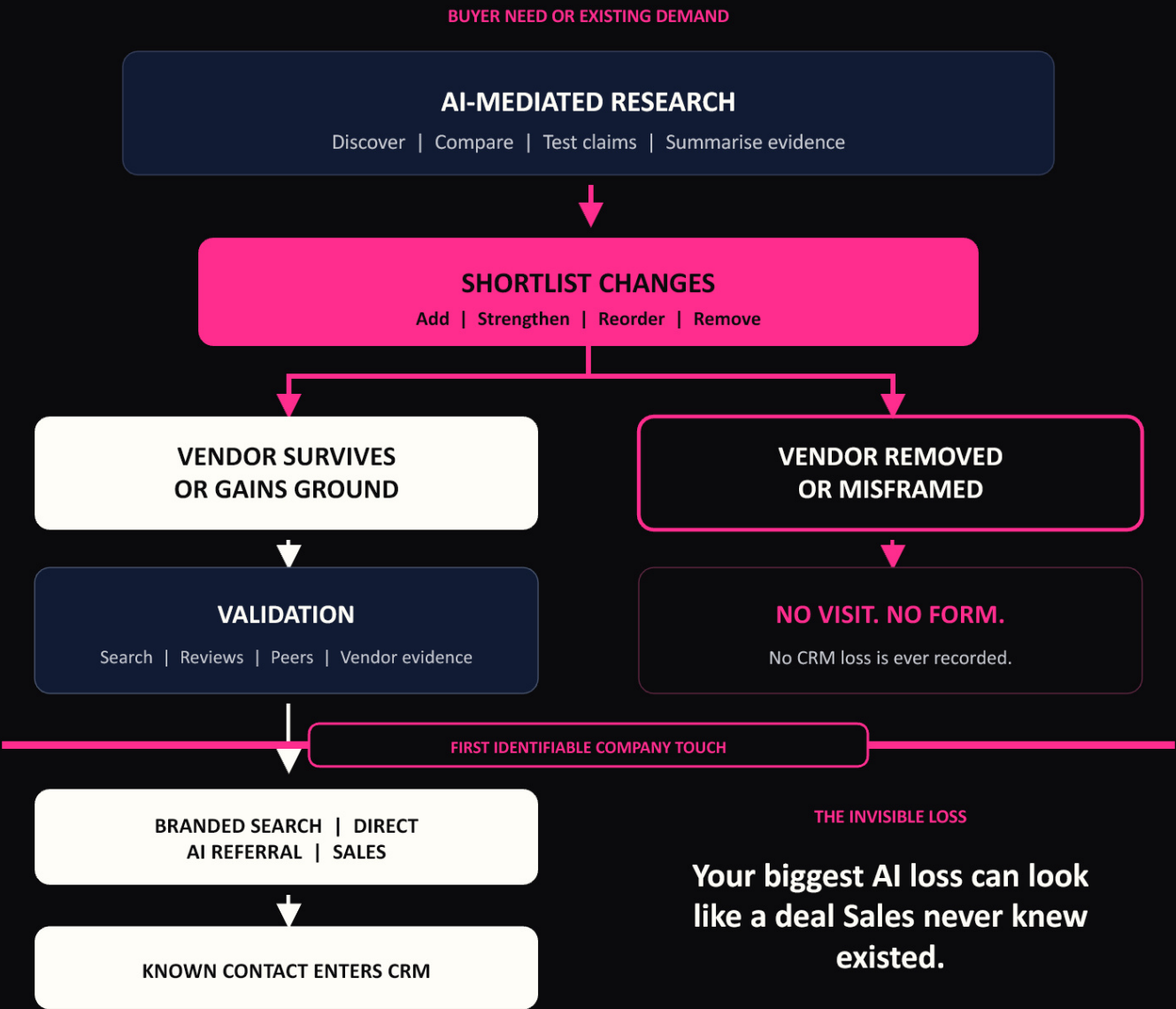
vendor choice redirected

Company-specific

pipeline you could win or protect

Your dashboard records the arrival. It misses the decision.

AI can add, strengthen, reorder or remove vendors before an identifiable company touch exists.



Three numbers. Three questions. One attribution gap.

The studies do not disagree. They measure different parts of the buyer journey.

3.37%

What the dashboard recognises

Identifiable AI referral traffic in Conductor's software and services cohort.

OBSERVED / CONDUCTOR

69%

What buyers say changed

Software buyers reporting that AI led them to a different vendor from the one initially planned.

REPORTED / G2

>97%

Where the referrer disappeared

Tracked downstream ChatGPT brand visits that carried no matched AI-referral signal.

OBSERVED / PROFOUND

Visible AI traffic and vendor redirection are different stages of the same buyer journey.

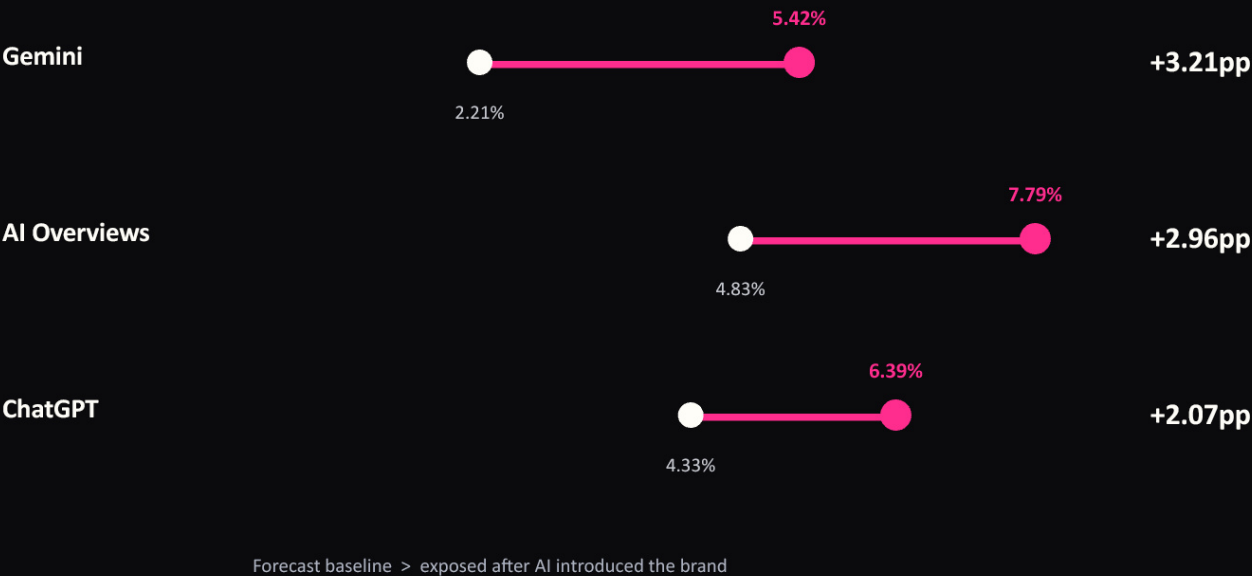
EVIDENCE MAP

Conductor, G2 and Profound

Separate populations, denominators and designs. Do not divide, subtract or average the three figures.

The influence survives. The referrer disappears.

A later visit can follow an AI brand mention without carrying an AI referral signal.



>97% of tracked downstream ChatGPT brand visits had no matched AI-referral signal

AI's biggest marketing impact may appear in every channel except AI.

AI did not just change the search. It changed the winner.

The model is built in the open so the reader can inspect the commercial logic.

REPORTED / G2

69%

software buyers said AI led them to a different vendor

High-value SaaS influence adjustment

$$69\% \times (91.1\% / 83.2\%) = 75.5\%$$

MODELLED / DIRECTIONAL

76%

estimated high-value SaaS vendor redirection



Roughly three quarters of high-ACV SaaS buying value may move between vendors because AI changes the expected choice.

MODELLED

G2 vendor-change baseline adjusted with Semrush high-value SaaS influence gradient

AI does not need to create the shortlist to decide who survives it.

Observed behaviour now connects visibility to selection, while the click still disappears.

ANSWER SHARE IN CHATGPT

Chosen brands



24%

Passed over



11%

0.57

visibility-choice
correlation

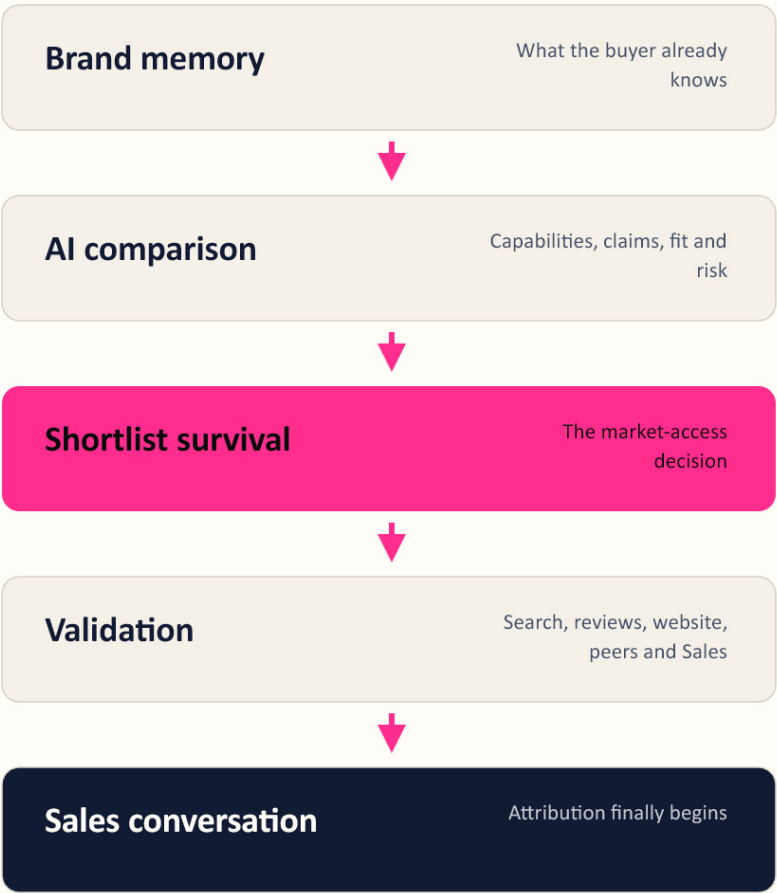
92.8%

of 219 assessable tasks produced no meaningful
open-web click

The choice took shape inside ChatGPT. Conventional analytics saw almost none of it.

Miss the Day One shortlist and the deal is usually over.

AI can shape who enters, who survives and what the buying committee validates before Sales is involved.



SEPARATE EVIDENCE BLOCKS

92%

said AI shaped the shortlist among Semrush AI users

95%

bought from the Day One shortlist in 6sense research

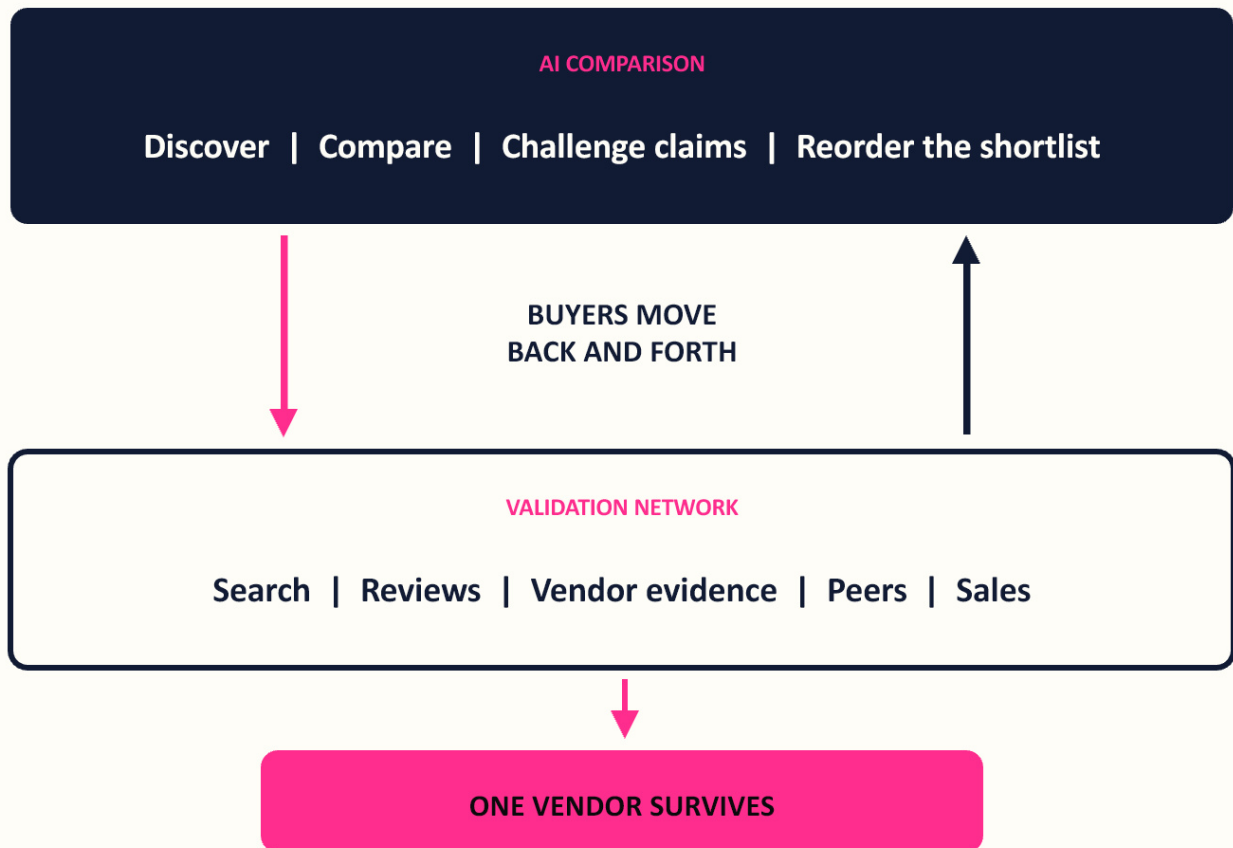
77%

preferred pre-contact vendor ultimately won

If AI changes the shortlist, it changes pipeline before a form is ever submitted.

AI and search are not competing channels. They are one buying loop.

AI narrows the field. Search, reviews, vendor evidence, peers and Sales verify the choice.



Last-click records the route into the website. It does not record where the shortlist changed.

Search is not dying. It is being reassigned.

Your largest deals hide your largest AI blind spot.

The more expensive and consequential the purchase, the deeper AI moves into the decision.

MODELLED / INVOLVEMENT

86% to 90%

AI materially involved in high-value SaaS decisions

MODELLED / REDIRECTION

76% to 79%

estimated vendor choice redirected in high-value SaaS

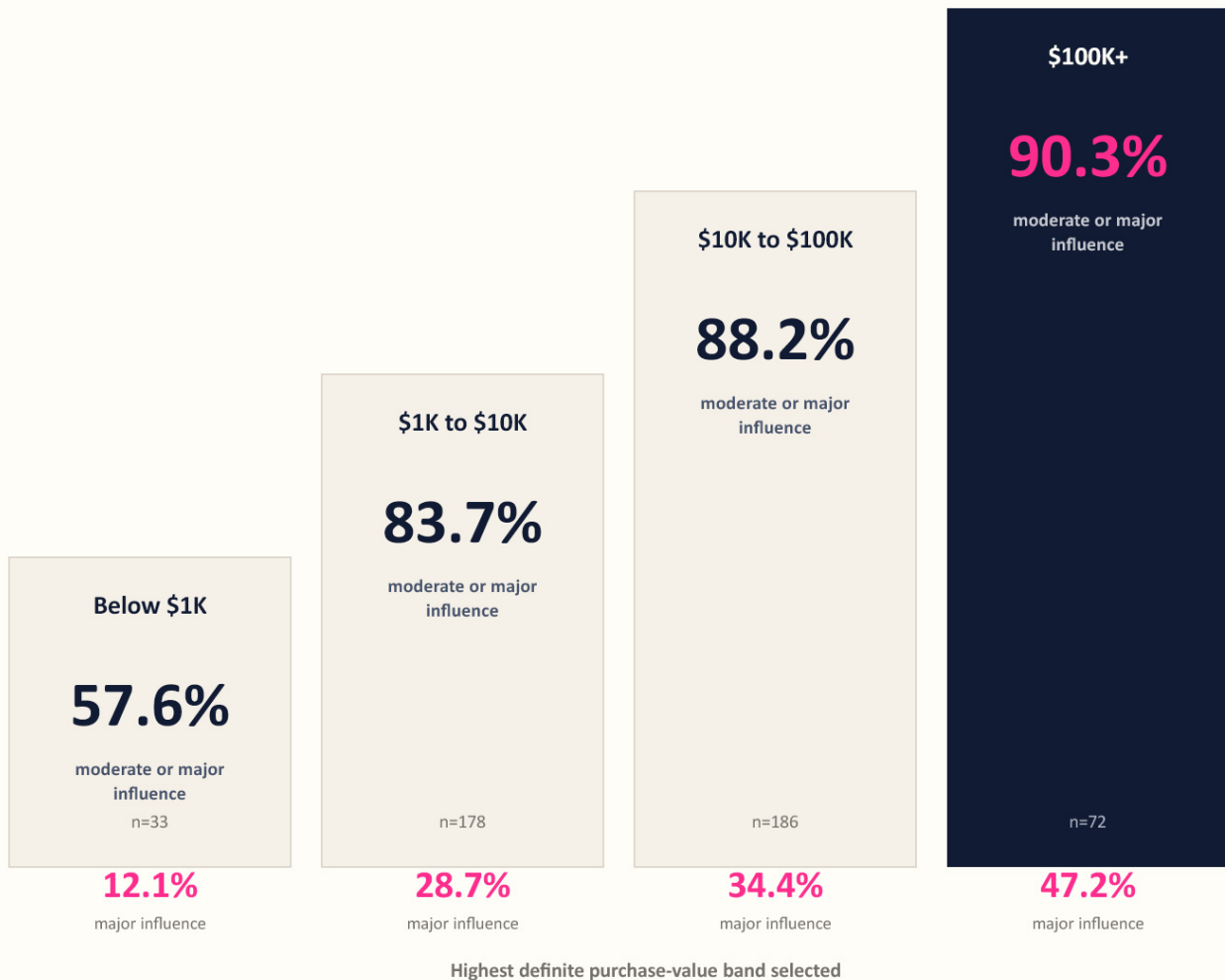
MODELLED

6sense adoption prior, Semrush influence gradient and G2 vendor-change baseline

Involvement and vendor redirection answer different questions. Neither is observed CRM attribution.

The more money at stake, the deeper AI moves into the decision.

Semrush respondent-level data shows a clear purchase-value gradient.



Deeper AI evaluation triggers deeper research: high reasoning ran 4.6x more searches.

REPORTED + TESTED

Semrush respondent-level analysis and Kevin Indig/Semrush Reasoning Lift

Separate studies. The prompt test explains a mechanism; it does not measure buyer adoption or prove the ACV gradient.

The people signing the deal report the strongest AI influence.

This is not junior researchers experimenting with ChatGPT.

147 of 149

AI-using SaaS final decision-makers said AI influenced the shortlist

95.3%

shortlist influence among all final decision-makers

High-value SaaS final decision-makers

95.7%

reported moderate or major influence on the final vendor decision

92.1%

moderate or major final influence

45.0%

major influence among final decision-makers

vs

17.8%

major influence among everyone else

AI influence becomes stronger, not weaker, at the top of the buying decision.

REPORTED

Semrush respondent-level analysis

Self-reported authority and influence. The high-value SaaS final-decision-maker segment is n=94.

B2B SaaS's Second Inbound Moment

The largest B2B discovery opportunity since content-led inbound is being managed like an SEO side project.



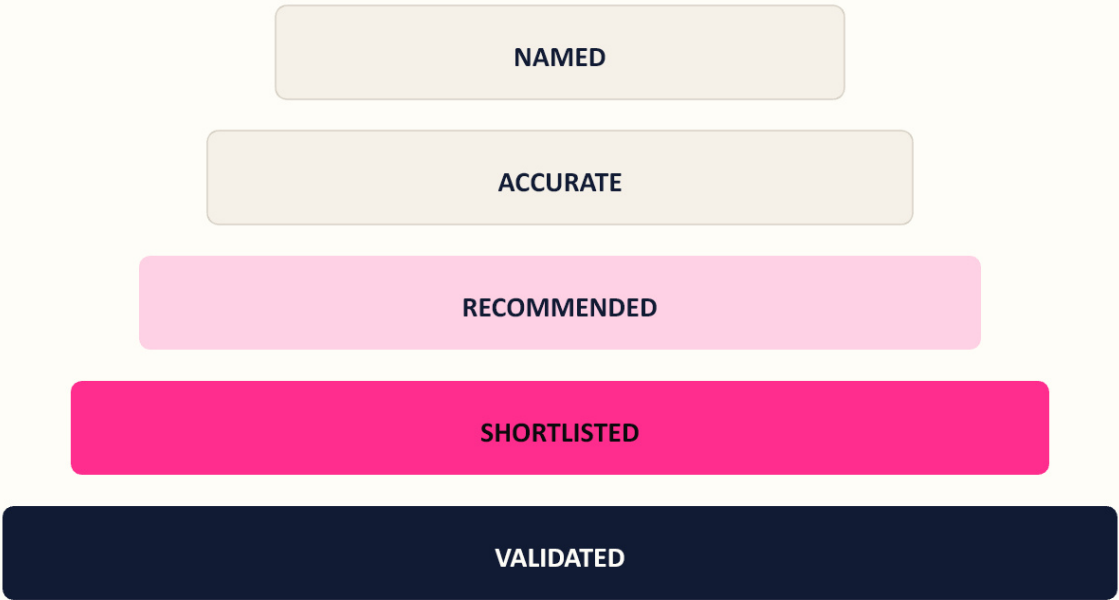
The SEO era rewarded being findable. The AI era rewards being recommendable.

Citations are plumbing. Recommendations are commercial real estate.

A brand can win the citation and still lose the buyer.

OBSERVED / GHOST CITATIONS

61.7% of all observed domain appearances were citation-only



Commercial value rises as the brand moves from source to survivor.

SYNTHESIS

Semrush and Kevin Indig Ghost Citations study, plus the report's commercial ladder

61.7% uses all 3,981 observed domain appearances as the denominator. Citation is not recommendation.

There is no such thing as our ChatGPT rank.

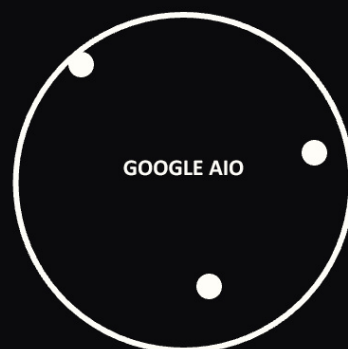
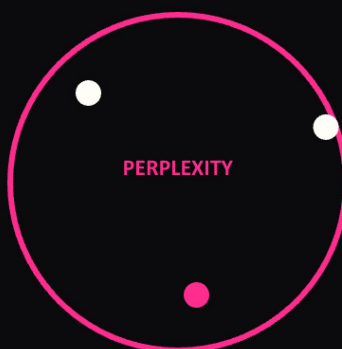
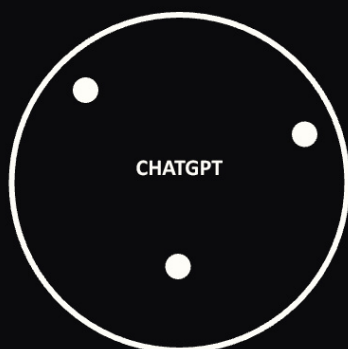
AI visibility behaves like a probability distribution across prompts, engines, models and time.

91.07%

of citations appeared in only one of the three engines

25.6%

domain overlap between minimal and high reasoning



Track recurring recommendation probability across engines and reasoning modes, not one rank.

The click is losing power as proof of influence.

AI answers can suppress the click while increasing the importance of what the answer says.

Without an AI summary



With an AI summary



Observed traditional-result click share

94%

of high-value buyers used LLMs in 6sense research

95%

still bought from the Day One shortlist

77%

preferred pre-contact vendor won

A falling click-through rate does not mean a falling decision impact.

There is no universal AI conversion multiplier.

The contradiction is the finding. Some cohorts are extraordinary. The broad evidence is not.

+42%

Adobe retail

AI-referred retail visitors converted more often than non-AI traffic in March 2026.

OBSERVED COHORT

23x

Ahrefs signups

AI traffic represented 0.5% of visits but 12.1% of signups in one company dataset.

FIRST-PARTY CASE

973

Ecommerce sites

The largest cross-site study found overall underperformance, with stronger results in complex categories.

PEER-REVIEWED

Do not promise a universal conversion uplift. Treat high intent as a hypothesis to verify in your own pipeline.

CMO decision: instrument the journey, segment by ACV and complexity, and refuse blended benchmarks that erase the contradiction.

COUNTER-EVIDENCE

Adobe, Ahrefs and Marketing Science

Different populations, channels and outcomes. These results must remain separate and must not be averaged.

The market is not unaware. It is unorganised.

Leadership pressure has arrived faster than operating capability.

Investment-level priority 90.0%

Forrester

Board questions arriving 88.0%

Corporate Ink

Search strategy changed 85.0%

Semrush

Defined strategy, highly prepared 34.0%

Corporate Ink

Actively measuring 29.0%

Corporate Ink

Fully integrated 22.0%

Semrush

REPORTED Forrester, Corporate Ink and Semrush marketing-leader research

Separate surveys and definitions. The aligned gap is directional, not one pooled operating-readiness rate.

Fund, Test, Monitor or Reject

A CMO decision matrix for acting before perfect attribution arrives.

FUND

High-value buyer prompt research
Shortlist and recommendation audits
Product evidence and proof gaps
PR, reviews and third-party authority
AI influence instrumentation

TEST

Category and role prompt panels
Content and comparison experiments
Sales-call AI attribution questions
Engine-specific evidence changes
Segmented pipeline analysis

MONITOR

AI referral routes
Branded search and direct traffic
Recommendation share and accuracy
Shortlist presence by segment
Platform and model volatility

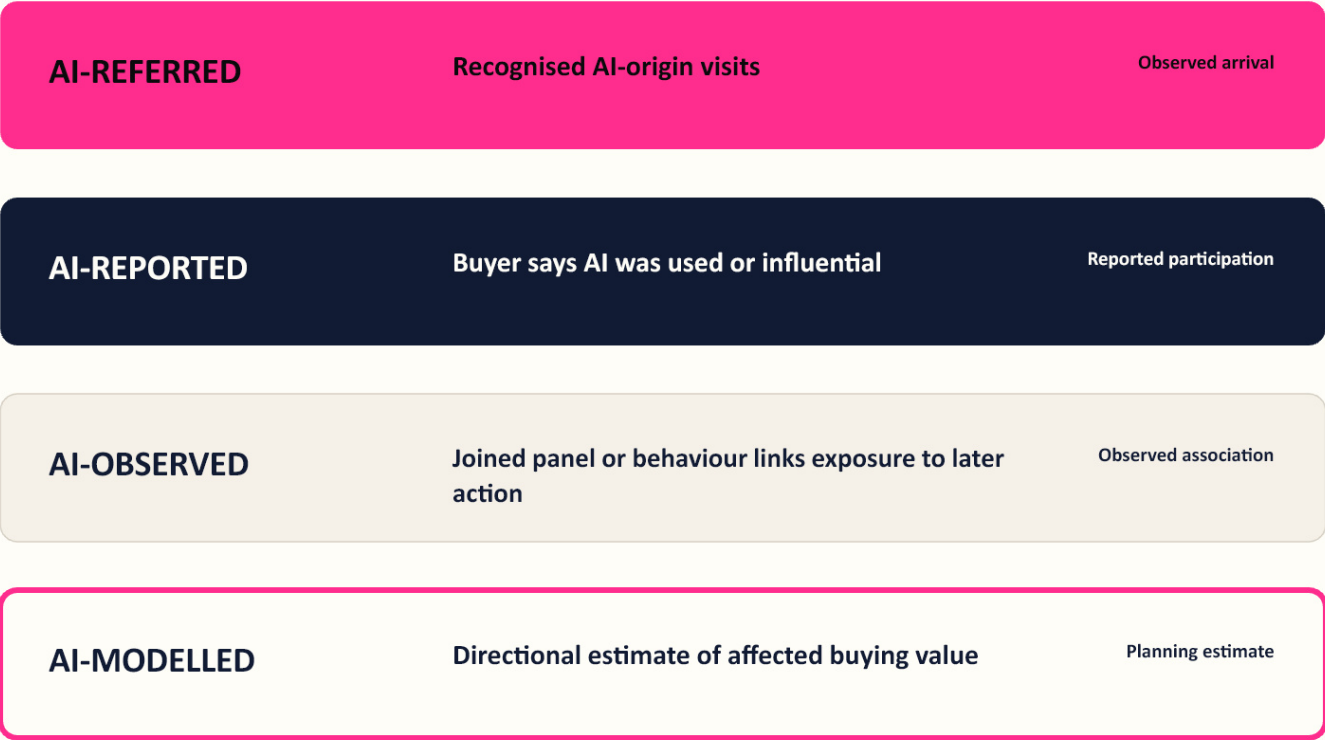
REJECT

One universal ChatGPT rank
Citation count as a revenue metric
Generic AI conversion benchmarks
Replacing SEO with GEO
Waiting for perfect attribution

Measurement should improve the investment. It should not be used as permission to begin.

Measure the hidden decision, not one traffic channel.

Four evidence layers are needed to see the buyer journey conventional attribution misses.



Add two questions to forms and Sales discovery

1. Did you use an AI assistant while researching this purchase?
2. Did it introduce, remove, validate or change a vendor?

BOARD SIGNALS
Shortlist inclusion
Recommendation share
Accuracy and fit
Buyer-reported influence
Pipeline by ACV

\$15.2M may change hands. \$2.7M may be put back in play.

A worked example separates market exposure from the opportunity one company can realistically influence.

Eligible high-value buying value

\$20.0M

AI-redirected share, modelled 76%

\$15.2M

Correctable visibility gap,
assumed 30%

\$4.56M

WORKED FORMULA

Gap closed, assumed
60% **\$2.74M**

$\$20M \times 76\% \times 30\% \times 60\%$

\$15.2M is the buying value where AI may change the winner. \$2.7M is the portion this company might realistically put back in play.

MODELLED

Illustrative company scenario using the report's 76% redirection estimate

The 30% visibility gap and 60% closure are assumptions. Put back in play is not guaranteed or observed revenue.

A 30-day plan to expose your AI shortlist gap

Start with the valuable decisions, not the biggest possible prompt list.

01

Map the decision

Choose one high-ACV segment and one consequential buying job.

- Define buyer roles and stages
- List known shortlist competitors
- Collect existing buyer and Sales language

02

Audit the shortlist

Run a repeatable, multi-engine prompt panel.

- Repeat priority prompt variants
- Score appearance, fit and recommendation
- Separate engine, model and reasoning mode

03

Fix the evidence

Close the gaps that cause exclusion or mistrust.

- Strengthen product proof
- Build comparison and risk evidence
- Improve third-party validation

04

Instrument and decide

Connect visibility work to real buying evidence.

- Add form and Sales questions
- Segment by ACV and authority
- Take Fund, Test, Monitor or Reject to the board

The first goal is not a perfect score. It is to find where the buyer can eliminate you before Sales exists.

The strongest argument against the hype. Why the report still stands.

A serious decision product should make the case against itself before asking for budget.

1	AI referrals are still small.	Correct. Referral share is the visible sliver, not a measure of every earlier decision.
2	Most buyer evidence is self-reported.	Correct. Joined-panel and behavioural studies still support the hidden-route mechanism.
3	The 76% result is not CRM-observed.	Correct. It is a directional model, clearly labelled and built from inspectable inputs.
4	Search and Sales still matter.	Correct. The evidence shows validation moves across AI, search, peers and people.
5	Engines and answers are unstable.	Correct. That is why visibility must be treated as a distribution, not one rank.
6	Conversion evidence conflicts.	Correct. Fund measurement and local experiments, not a universal ROI promise.

THE DECISION BOUNDARY

PROVEN: AI use, click disruption and hidden routes. **PROBABLE:** shortlist and commercial influence. **MODELLED:** 76% vendor redirection. **UNSUPPORTED:** one universal ROI multiplier.

221 reports did not produce one average.

They exposed one commercial problem across incompatible evidence types.



AI visibility is already deciding who gets considered, who survives and who reaches Sales. High-value B2B SaaS should fund it as market access, not manage it as an SEO experiment.

Full methodology, 221 linked sources, board memo and diagnostic will accompany the public web edition.