

KANTAR

WINNING IN 2026

CHOSEN BY AI THE NEW RULES FOR WINNING SEARCH



How much **digital shelf space** does AI give you?

As people increasingly turn to AI tools to reduce overwhelm, seek inspiration, and generate shortlists, we have reached an inflection point for brands and brand owners.

Put simply, AI tools have become the new digital shelf, deciding which brands get shown, and which get left out. While humans might still make the final purchase decision in most cases, brand visibility - and how brands show up - is increasingly curated and filtered by new gatekeepers: the AI search bots or, more officially, the large language models (LLMs) powering tools like ChatGPT and Google AI overviews.

With the pace of change moving so quickly, it can feel a bit like the wild west. Many of our clients are asking where to begin and how to navigate this rapidly evolving landscape.

If this sounds familiar, you're not alone - these slides will equip you with the clarity you need to start making progress.

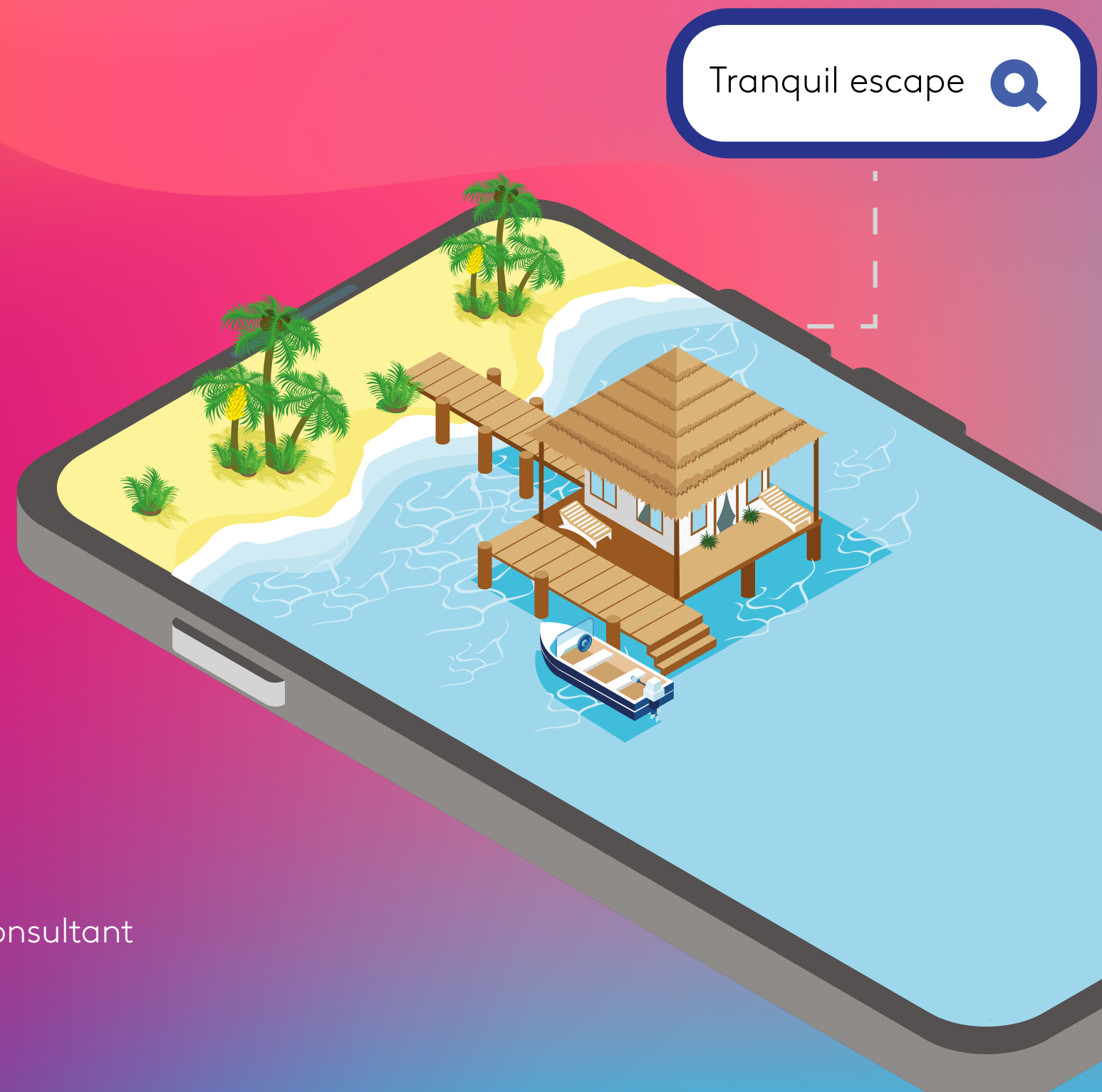
This content was also covered in a webinar. Missed it? You can [watch it on demand here](#).



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Our proprietary data shows that **both consumer effort and engagement with AI search** is higher than with organic search.

As this shift continues and AI search responses become more normalised, the longer-term impact on brand building will become more obvious.

If your brand is present and showing up well in AI search, this reinforces or builds on the human predisposition already earned. However, if your brand isn't visible or is showing up negatively, over time that hard fought human predisposition will start to be eroded by the machines.

Over half

say they spend longer interacting with GenAI apps than with standard search

69%

of people write full sentences like they are talking to a real person

53%

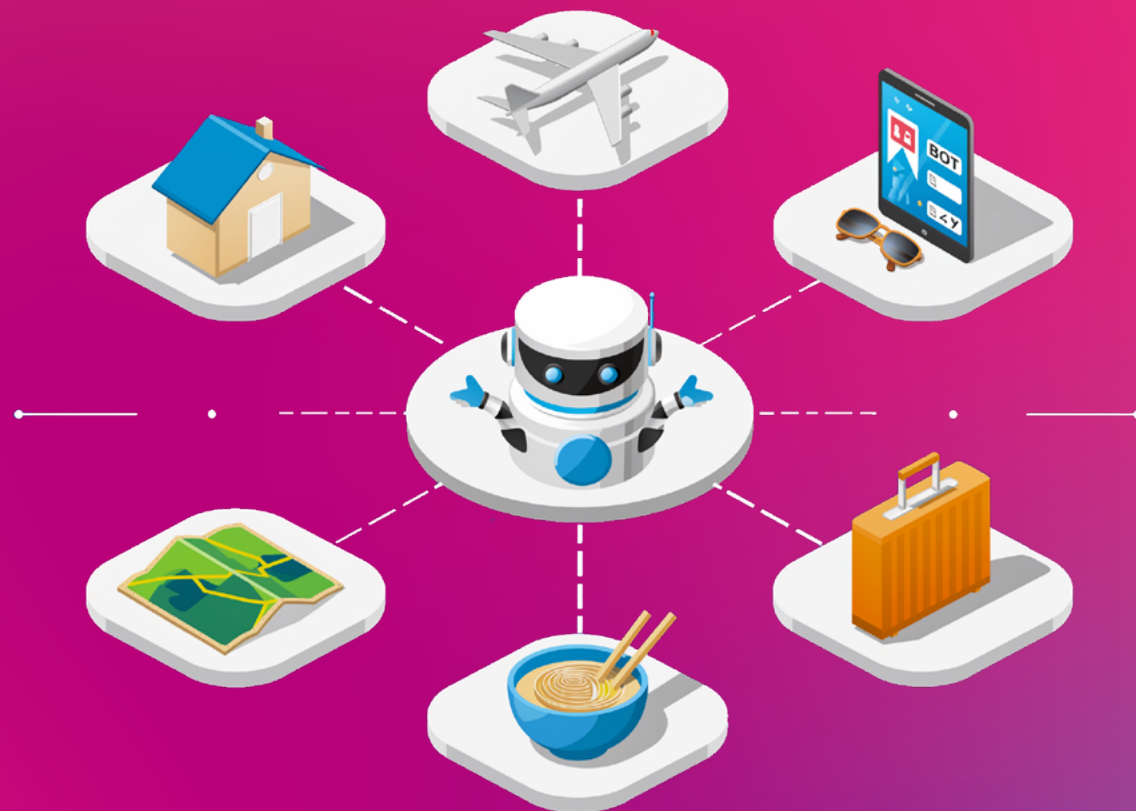
fully or mostly trust AI generated responses

Source: Kantar AI Barometer survey (Jan 2026)

This shift is creating new jobs for marketers

As marketing and insight teams, your main concern was to **predispose more people** to your brand – to generate positive perceptions that would load the dice in your favour that mean people would be more likely to want to buy you, and pay more for you, relative to a competitor.

The inconvenient truth is that **machines are your brands new gatekeeper** and there are two new jobs:



01

Before you can get to a human, you have to be chosen by the machine or large language model

The machines are now curating and filtering what brands get put in front of consumers, and how they are talked about. You now have to predispose the LLMs to not just mention your brand but to select content that represents it in the right way.

02

To be chosen, your brand therefore needs to be present in the sources that the large language models get their data from

If your brand isn't being talked about in these spaces, it will be invisible to machines even if it is 'famous' elsewhere.

Whilst SEO is more about optimisation, **the new world of AEO and GEO** should also be under the management of brand owners

Are you set up for the future?



Google overviews (AEO)

Selects the right source

Brands need to be the most **trusted, authoritative and verifiable** source, and content must be presented in a structured way.

Generative AI (GEO)

Predicts the correct or best answer

Brands need to be coming across in a **consistent** way across in as many of third-party sources that LLMs prefer.

We've put together **7 evidence-led slides** that highlight the challenges facing brands in this space.

These will help you understand:

1

What does AI search mean for our brand strategy?

Make the case for exploring the impact AI generated search results are having on your category and brand.

2

How do we measure AI search impact?

Identify which data sources give you the most accurate picture of the landscape.

3

Is this just about content optimisation?

Understand the role AI search is having not just on brand visibility but also on long-term brand equity.

01

Are brands mentioned in Gen-AI responses?

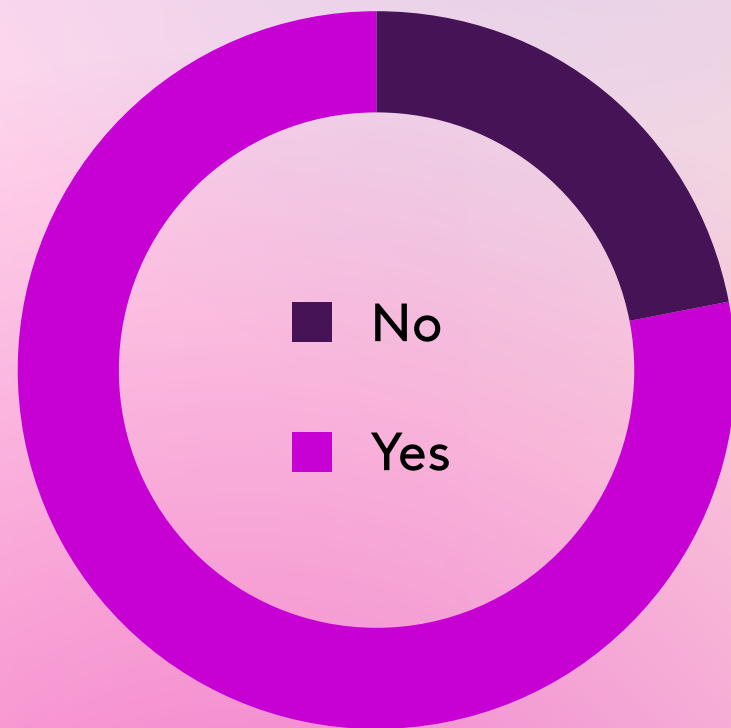
Branded search declined by as much as **35%** in the last year, but don't be led by clicks. Search isn't dead, it is being redeployed to LLMs who still love brands, but use their own filters to decide if and how you show up.

At an aggregate level brand websites represent

Over
50%
of sources in travel

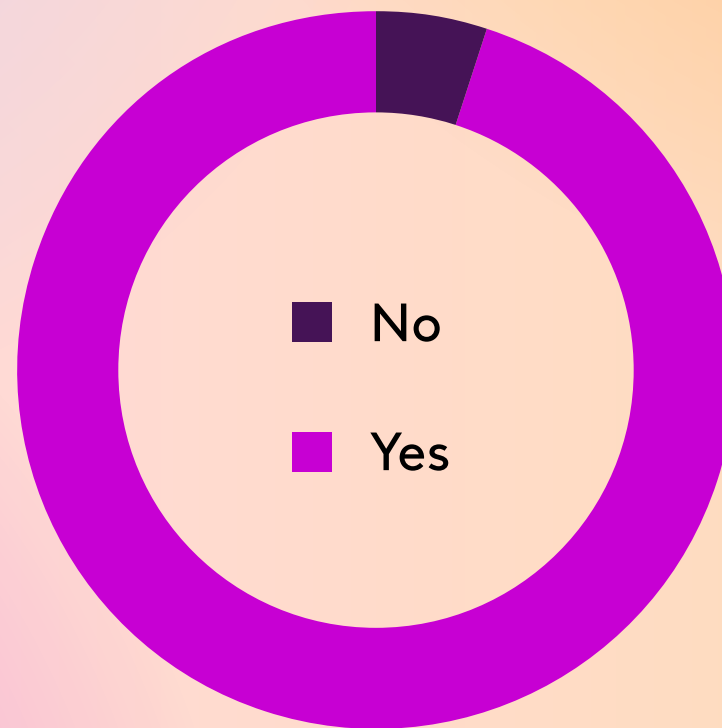
Over
20%
in beauty

Travel



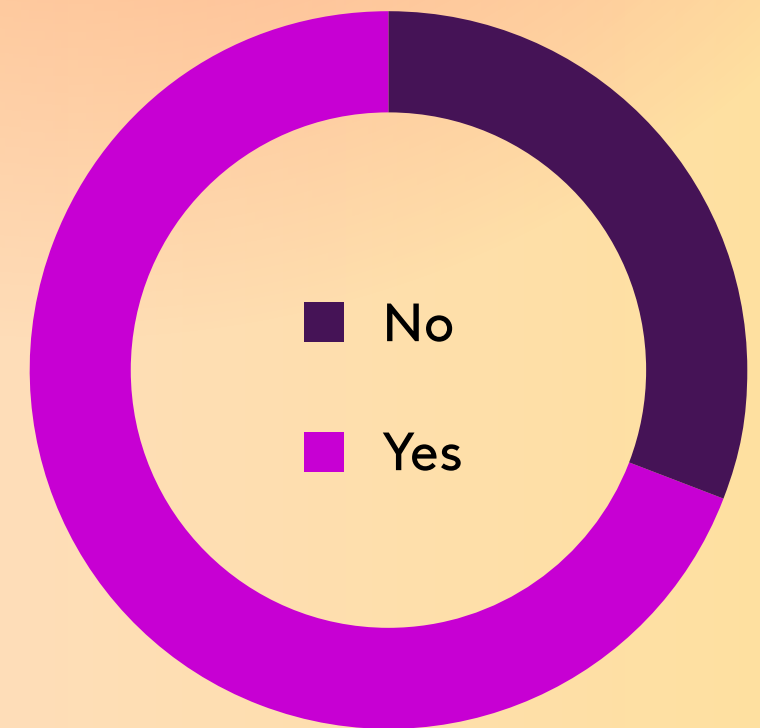
78%
brands mentioned

Mobile Phones



95%
brands mentioned

Beverages



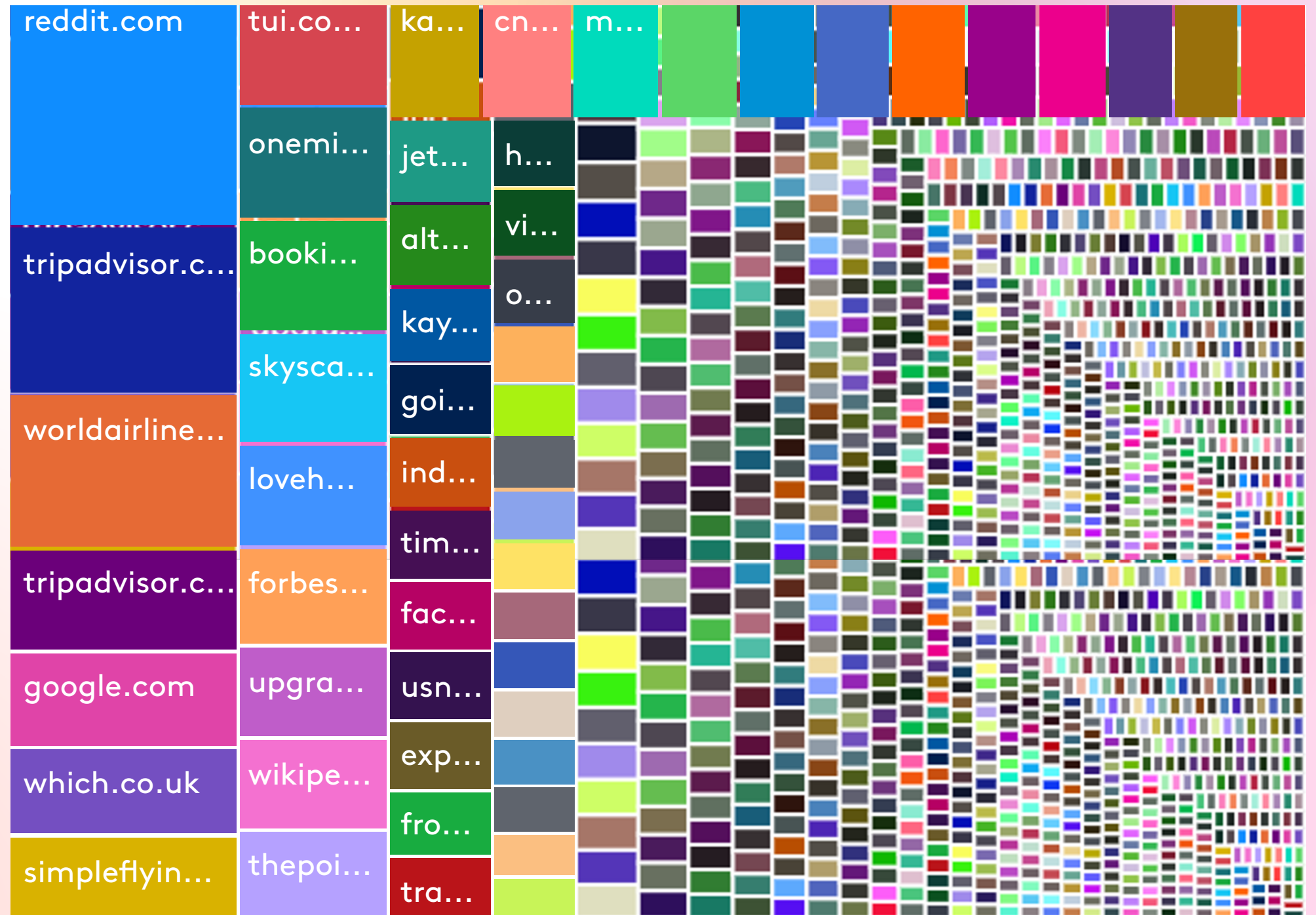
69%
brands mentioned

02

Don't believe all the hype

Reddit is hugely influential and is the largest single preferred source for LLMs, but the landscape is so fragmented that the leadership comes with just a **5% share**.

In beauty, Reddit leads with a **9% share** with the category having a similarly long tail of sources.

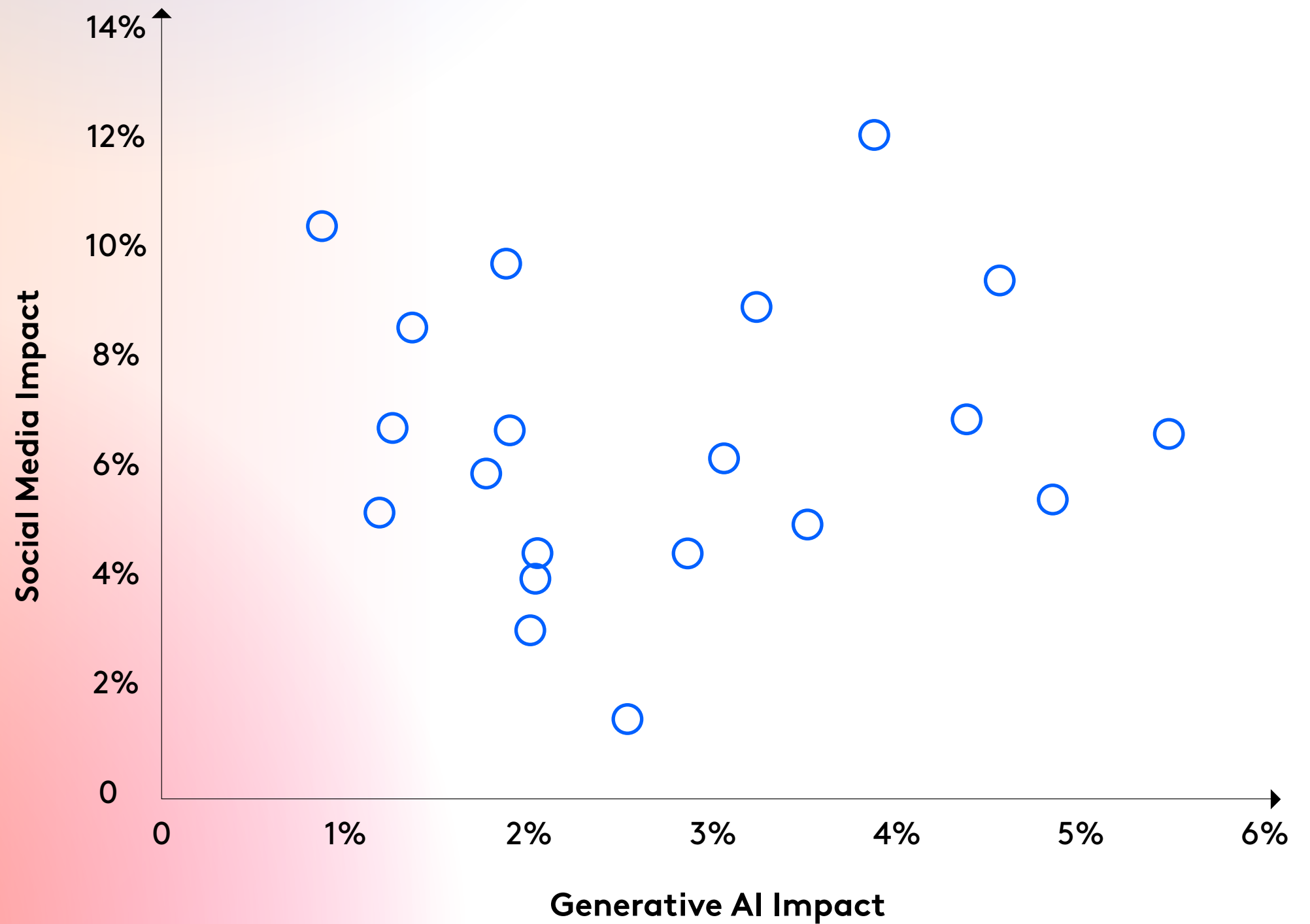


03

Doubling down on social media and creators **won't aid your AI search visibility**

Be aware there is a lack of synergy between the **impact** of social media and AI search results. Investing in one doesn't see return in the other.

The aim for brands should be to enable conversations to travel across both search and social platforms.



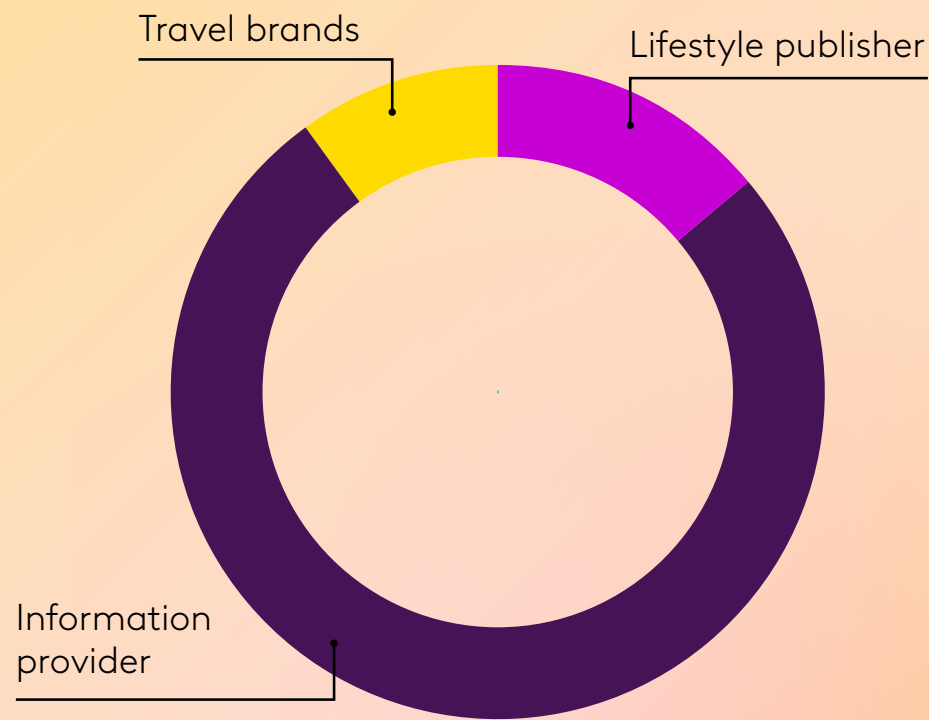
Source: Kantar 'Connect' touchpoint impact study: Travel category UK (Dec 2025)

04

Human brains aren't the same and neither are machines who have their own preferences and biases. **How do you plan for these?**

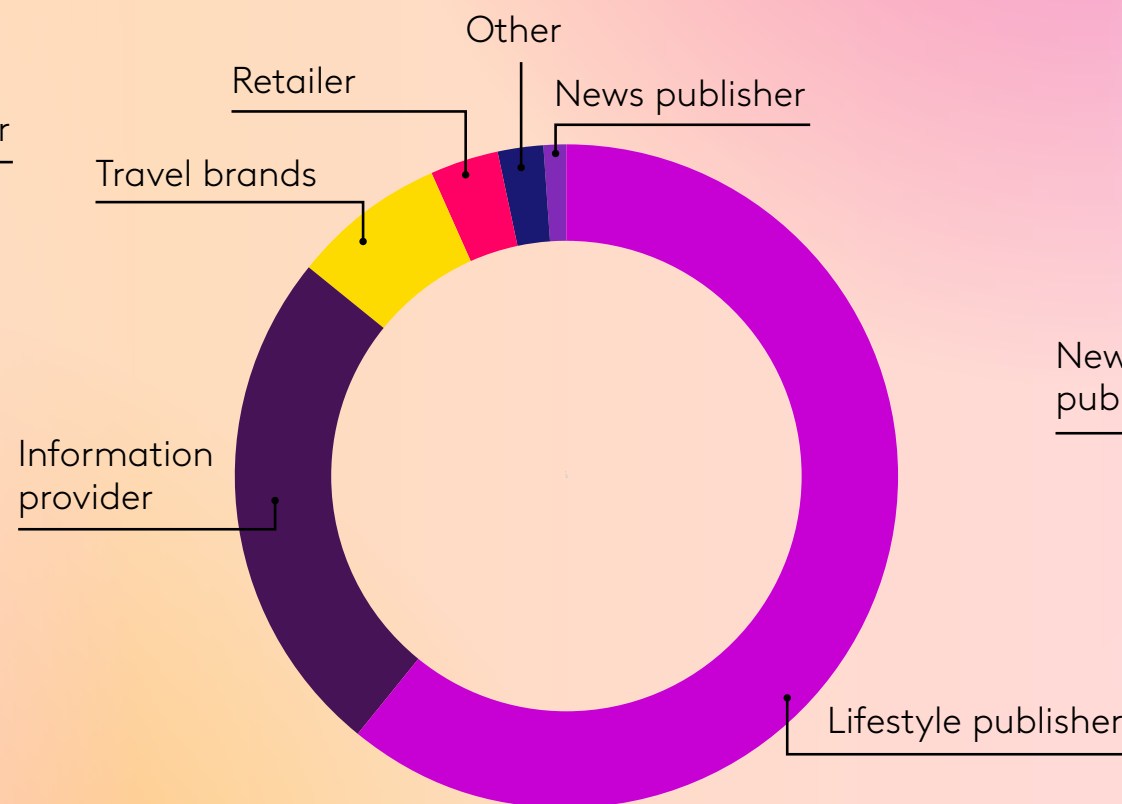
What is the best long haul airline?

GOOGLE AI OVERVIEWS



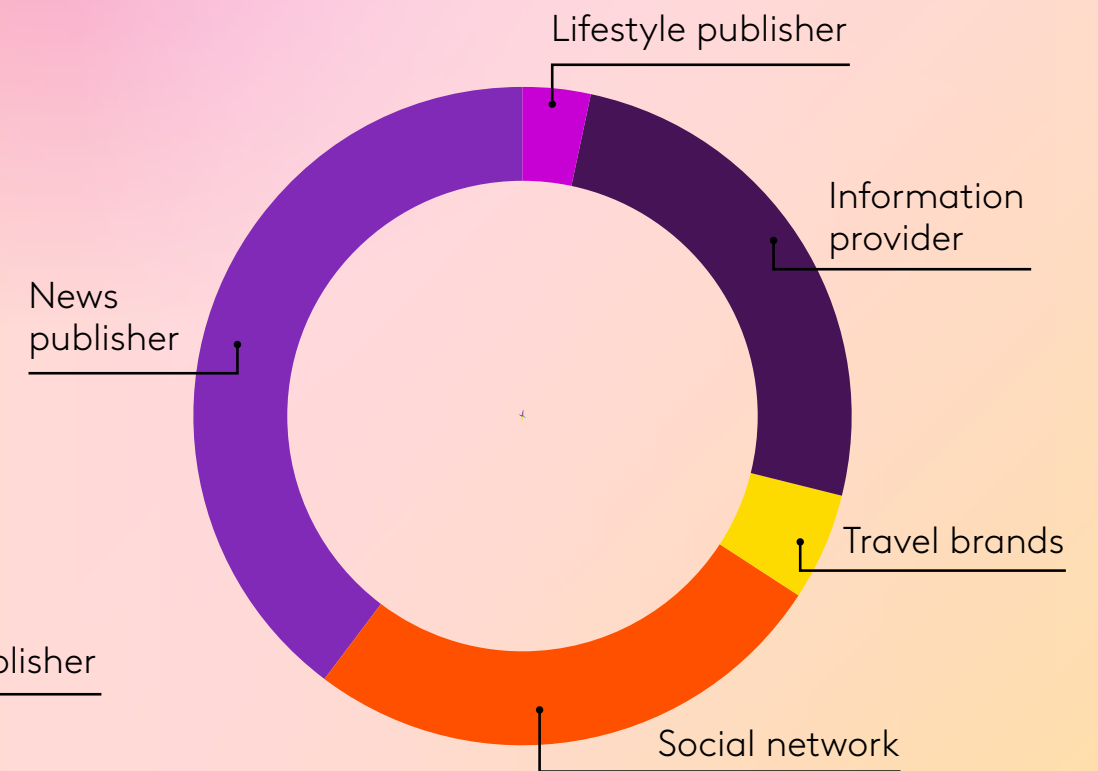
Has a strong leaning towards trusted 'information' sources like moneysupermarket and world airline awards.

CHAT GPT



Has a strong leaning towards lifestyle brands like Forbes.

PERPLEXITY

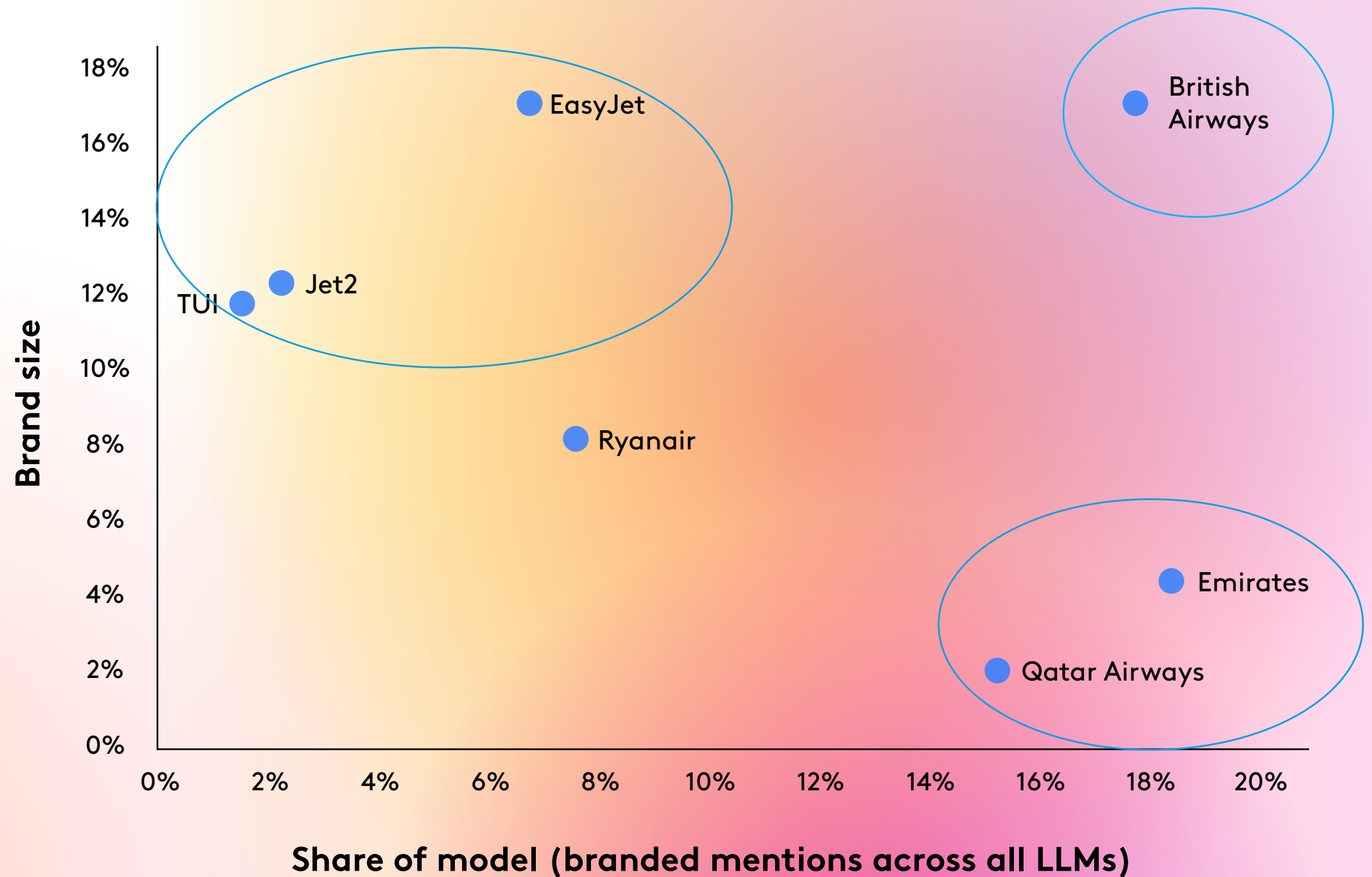


Has a strong leaning towards news and social networks, namely Reddit.

05

Being a big mass market brand **doesn't guarantee you will show up more in AI search results**

LLMs don't care if you're famous, they care that you are being talked about, delivering exceptional experiences, and fulfilling a specific need.

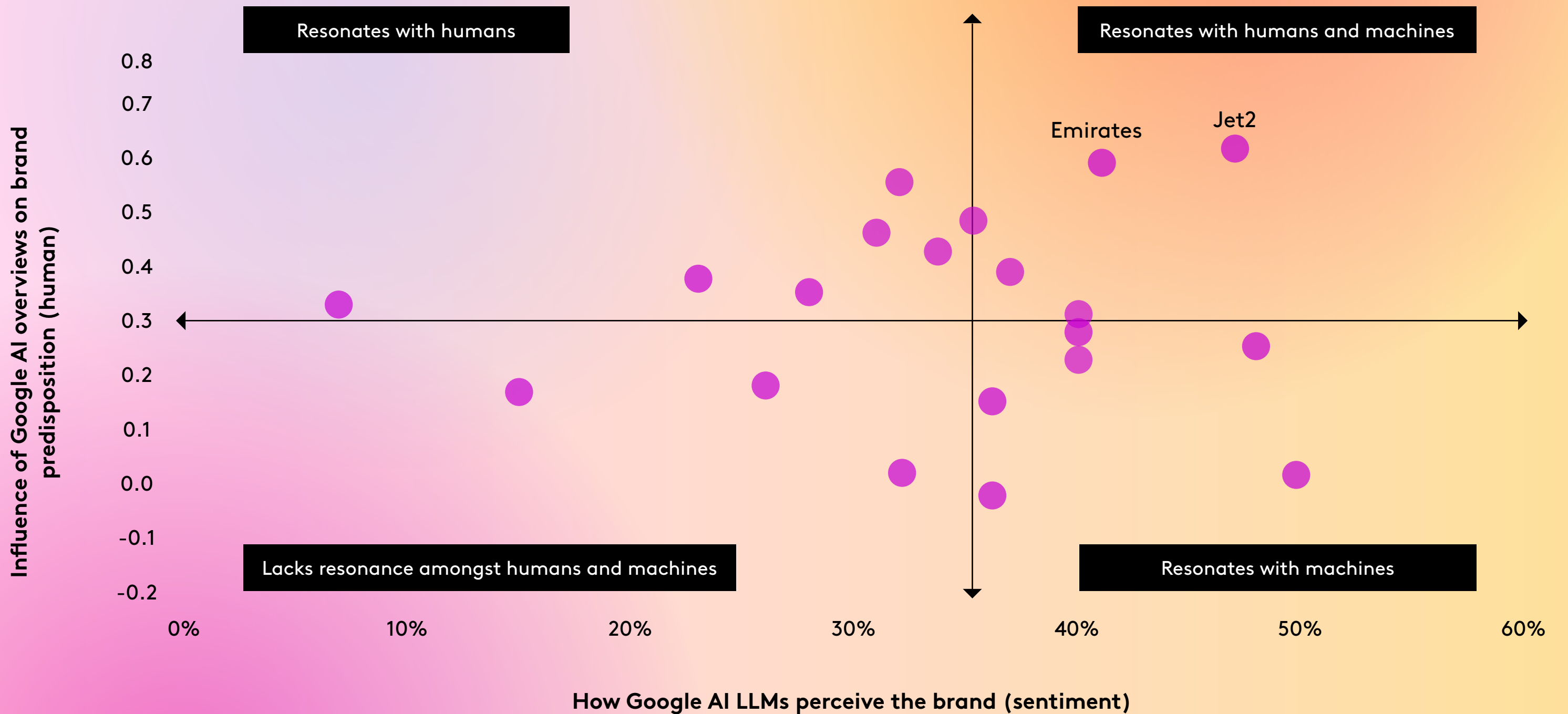


Source: Human Data: Kantar BrandDynamics Airlines
Machine data: AI search analytics Airlines

06

You can't assume that because your brand is winning with humans that it will win the **'hearts'** of machines

Google AI Overviews



Sentiment: Gen AI analytics (Jan 2026)

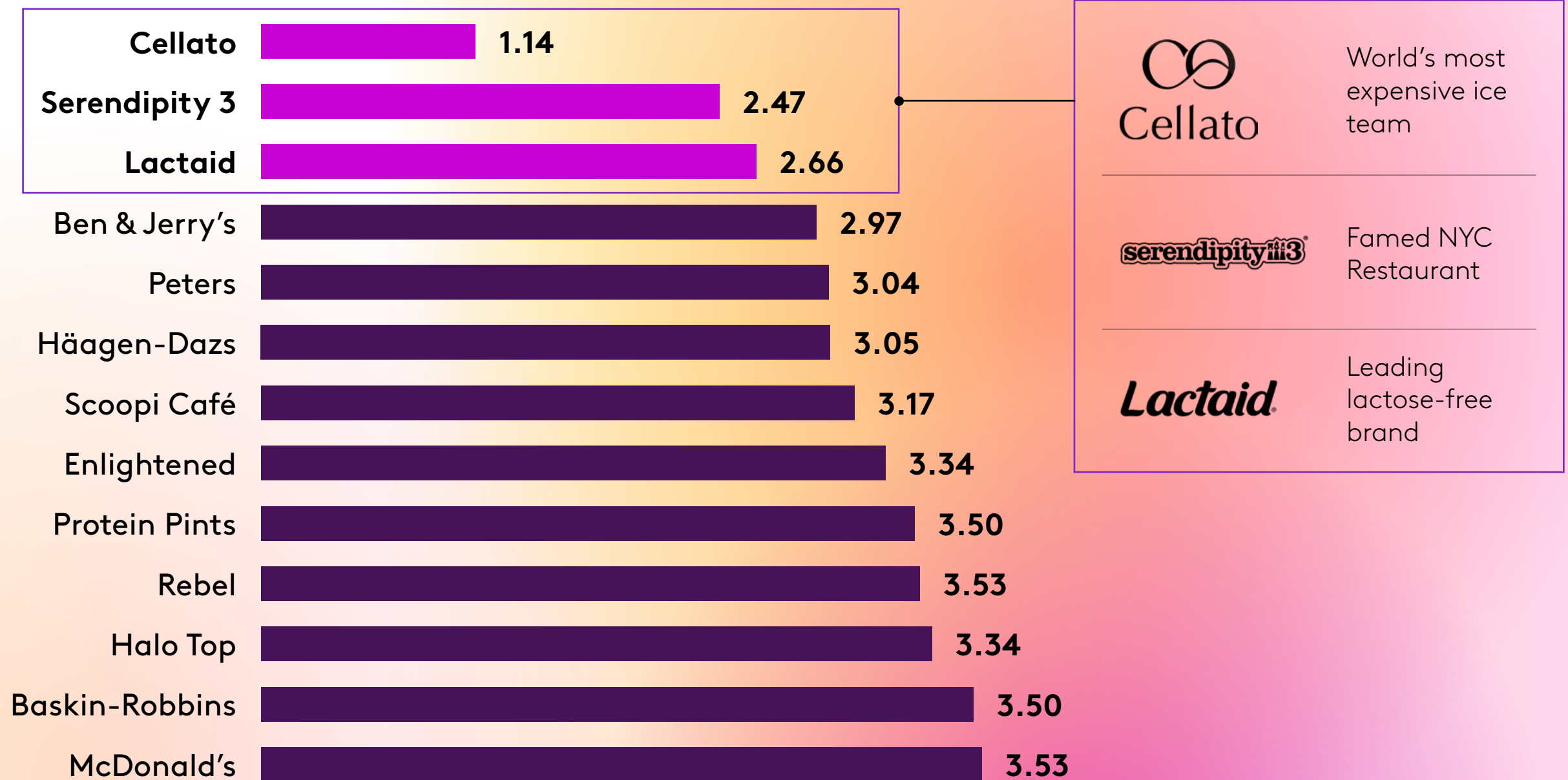
Influence of AI overviews: Connect touchpoint study (Jan 2026)

07

Is your brand 'tangibly' different?

Machines struggle to interpret emotion/abstract concepts so dialling up more functional differences is vital to avoid losing out to niche brands

Average brand ranking when mentioned
Ice Cream
(USA)



Source: Gen-AI Brand Tracking, Ice Cream USA (Nov 2025)
Ranking is the average order the brand is mentioned when cited in an AI answer

Get in touch

Kantar delivers Brand Intelligence built to meet the realities of today – powered by both human insight and machine-driven signals

Understanding how to maximise your impact amongst both audiences is now essential and most brands are still figuring out how to compete in an AI driven world.

We hope this work has given you fresh perspective on how AI search is reshaping brand visibility and what it takes to stay ahead.

Whether you want a demo of the tools behind these insights or to discuss how we're supporting other brands through similar challenges, we're here to help.

Please do reach out. We'd love to support your next step.

For more information contact:



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