



The Visibility Gap: Why AI Changes Everything



QUICK INTROS



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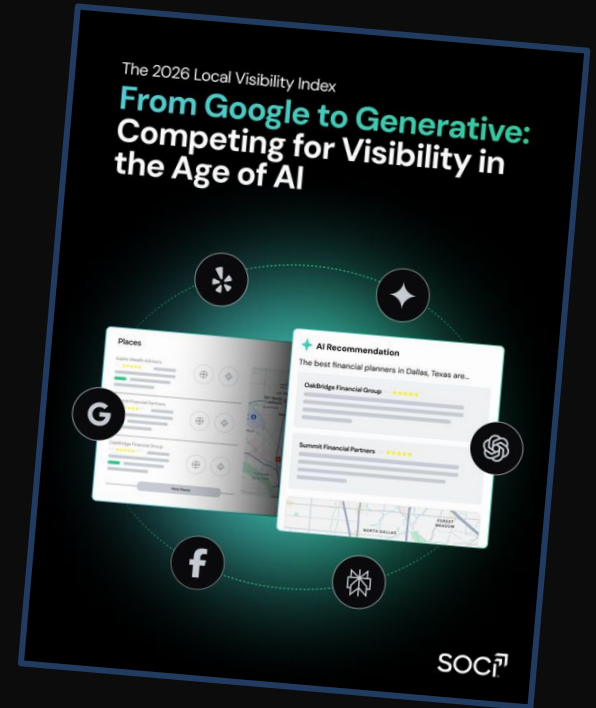
2026 Local Visibility Index

From Google to Generative: Competing for Visibility in the Age of AI

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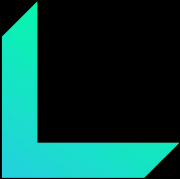
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KEY LVI FINDINGS

1. *The Shift*



AI recommendations for a local brand are up
to **30X more difficult** than inclusion in the
Google 3-Pack

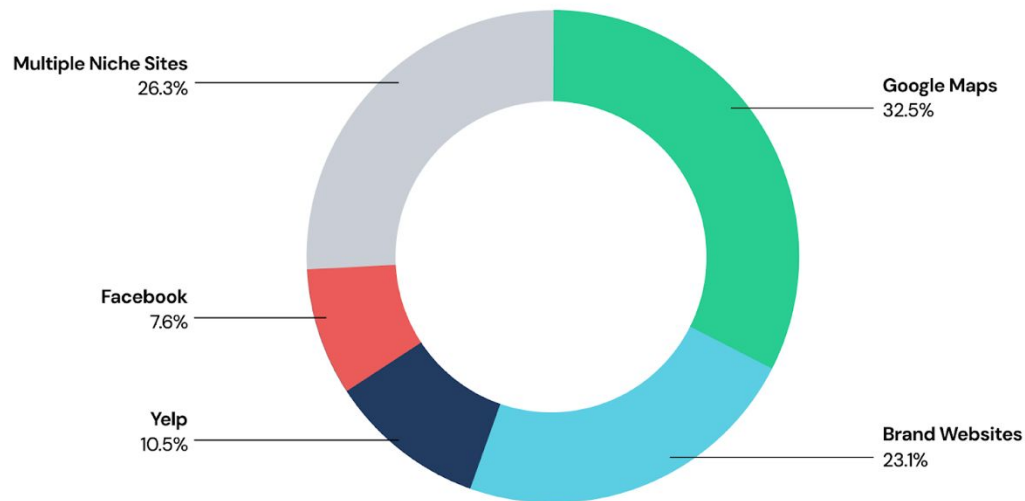


SAME CORE SOURCES



- When answering local queries, LLMs primarily reference **Google Maps, business websites, Yelp, and Facebook** as well as a variety of niche sites
- **ChatGPT, Perplexity,** and other non-Google LLMs synthesize these sources into a single answer, often revealing gaps and inconsistencies
 - These platforms are **only about 68% accurate** when providing business contact info
- **Gemini**, grounded in Google Maps as a primary source, has much higher levels of accuracy and consistency in local answers

Top LLM Sources Overall



REVIEWS FUNCTION MORE AS A GATING FACTOR THAN A RANKING SIGNAL



- In traditional search, businesses with lower ratings still had a chance to be seen
- With AI recommendations, these brands may not be selected at all
- **ChatGPT** in particular has a high bar of **4.3 stars** for inclusion in local recommendations
- Recommended businesses average **4.2 stars** on **Perplexity** and **3.9 stars** on **Gemini**



AI IS MUCH MORE SELECTIVE



*On average, brand locations are recommended by LLMs at a rate of **6.5%***



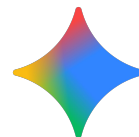
35.9%

% of brands appearing in the Google 3-Pack for top keyword



7.4%

% of brand locations recommended by Perplexity



11.0%

% of brand locations recommended by Gemini



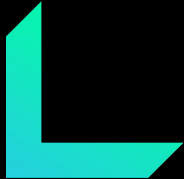
1.2%

% of brand locations recommended by ChatGPT




Key LVI Findings

2. The Gap



There is only **45% overlap** between the most visible brands in traditional local search vs. AI local recommendations





SEARCH VISIBILITY

- Using **Google Primary Category** as keyword, we search in every relevant zip code for the brand location on:
 - **Google Maps/local results** (GBP)
 - **Google Search** (website in organic rankings)
 - **Yelp** (listing rank position in Yelp search)
- Other factors include **claiming rate**, **profile completeness**, and **onsite SEO**

AI VISIBILITY

- Again using Primary Category, we ask **ChatGPT**, **Gemini**, and **Perplexity** to recommend 10 businesses of type X in market Y
 - If the target brand location appears in positions 1-5, we consider the location “likely to be recommended”
 - We aggregate results by brand or industry to derive **% recommended**
- We also assess **profile completeness and accuracy** as well as **sentiment**

RETAIL EXAMPLE



- We ranked **171 enterprise brands in the retail industry** according to visibility in traditional search vs. visibility in AI
- We found that **only 45% of brands** appeared in the top 20 for both groups
- Some brands scored lower in search and higher in AI, some lower in AI and higher in search
- **Men's Wearhouse** ranked #6 in most visible enterprise retail brands for Traditional Local Search and #103 for AI Local Search.

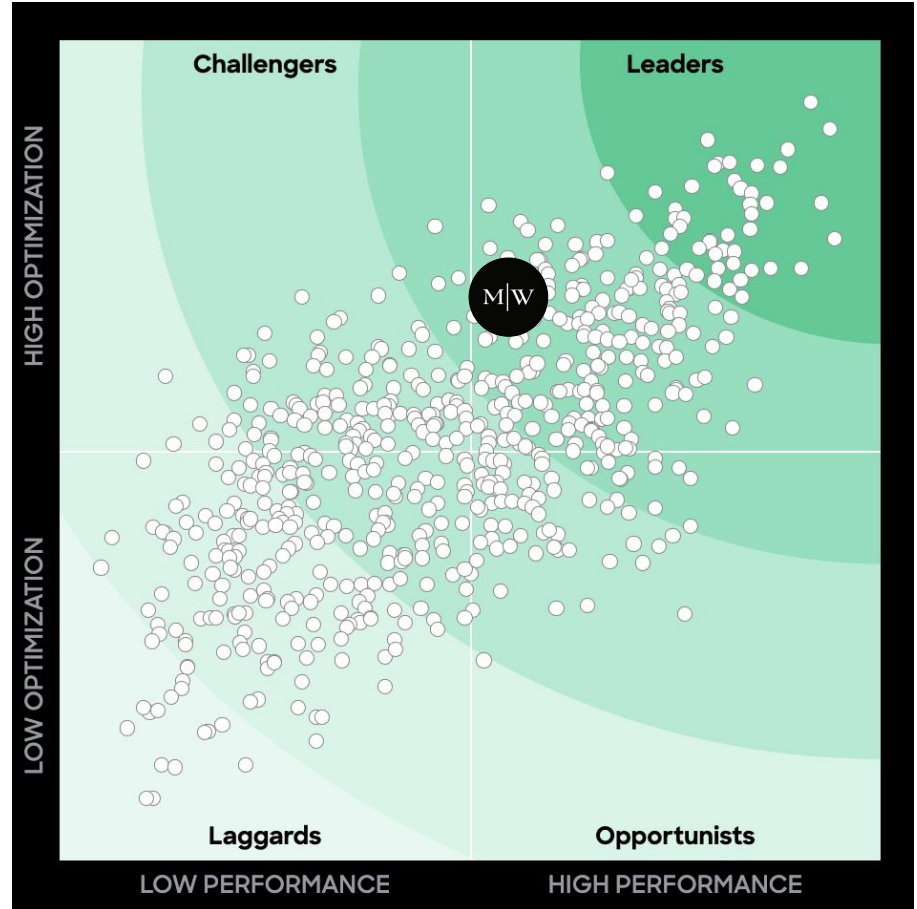
Local Search Rank (Retail Enterprise)	Brand	Search Visibility Score	Local AI Rank (Retail Enterprise)	Brand	AI Visibility Score
1	Batteries Plus Bulbs	87.1	1	Sam's Club	70.7
2	Sam's Club	83.5	2	Publix	69.2
3	PetCo	82.6	3	Costco	64.6
4	Ulta Beauty	82.0	4	Hobby Lobby	64.1
5	Dick's Sporting Goods	81.9	5	Aldi	64.0
6	Men's Wearhouse	80.6	6	Barnes and Noble	62.5
7	Michael's	80.5	7	H-E-B	62.3
8	Kay Jewelers	80.0	8	Mattress Firm	61.0
9	Target	79.6	9	HomeGoods	60.6
10	Petsmart	79.6	10	Michael's	60.3
11	O'Reilly Auto Parts	79.4	11	Petsmart	60.0
12	DSW (Designer Shoe Warehouse)	79.2	12	Harbor Freight Tools	59.2
13	Jos. A. Bank	79.2	13	Marshalls	56.9
14	Kohl's	78.9	14	Target	56.6
15	Aldi	78.7	15	Kohl's	56.3
16	Kroger	78.6	16	Batteries Plus Bulbs	56.2
17	Mattress Firm	78.3	17	Kwik Trip	55.6
18	Sherwin-Williams	78.0	18	Love's Travel Stops	55.4
19	JCPenney	77.2	19	Carpet One Floor & Home	55.2
20	AutoZone	76.9	20	AutoZone	54.8

RETAIL EXAMPLE

Men's Wearhouse

In the 4 visibility areas that the LVI measures - The Men's Wearhouse scored at or above benchmark in all areas - earning them a spot in the "Leaders Quadrant"

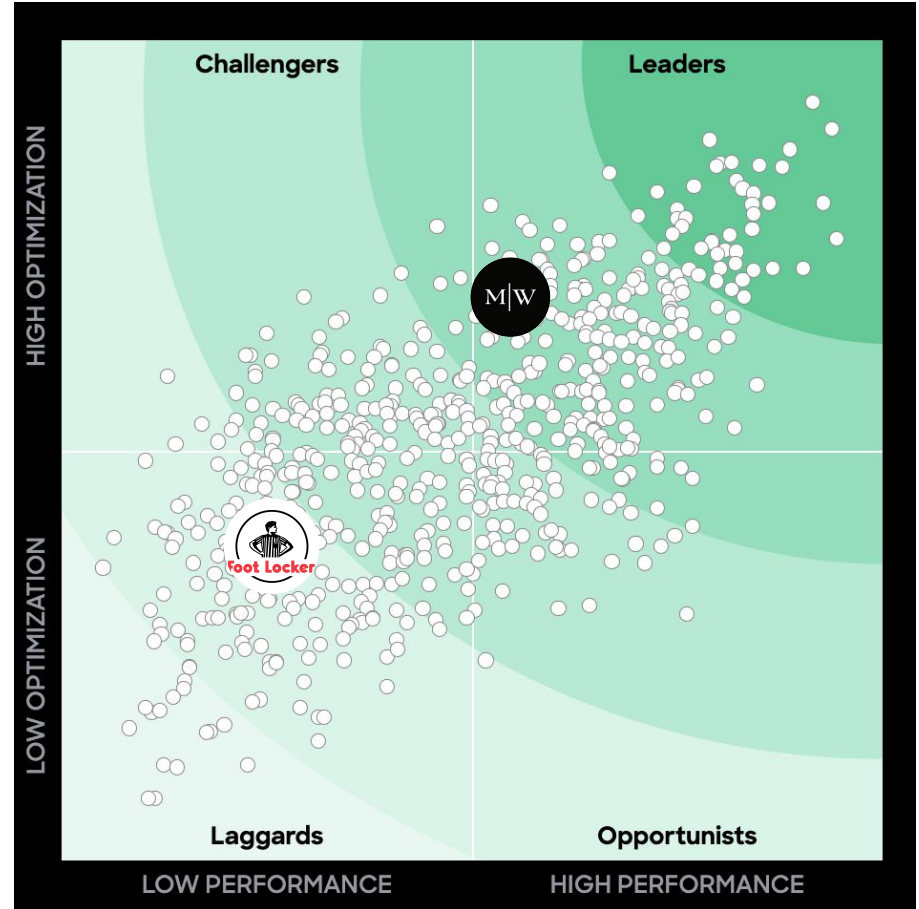
Overall Visibility Score: 58.4		
Clothing & Accessories Rank: #24 of 159		
LVI Scores	Men's Wearhouse	Benchmark
AI New	43.0	43.3
Search	80.6	57.7
Reputation	61.5	36.0
Social	50.1	28.0



MEN'S WEARHOUSE

Leader vs. Laggard

- **Men's Wearhouse** has 67% presence in the Google 3-Pack and 14% rate of recommendation in ChatGPT (vs. 9% industry average); the brand has a 4.1 star rating on Google and 99% of their Google profiles have social links.
- **Foot Locker** has 0.0% Google 3-Pack presence and 0.0% recommendation rate on ChatGPT; Google profile completeness is at 91.3%, average Google rating is 4.0 and only 3% of profiles have social links.





KEY LVI FINDINGS

3. The Playbook

SOCi's LOCAL VISIBILITY QUADRANTS



Our **Local Visibility Quadrant charts** group brands into four categories by differentiating between **best practices** (y axis) and **outcomes** (x axis).

Leaders are those brands that:

- **Follow best practices** (claiming and optimizing profiles holistically, asking for reviews and responding, posting frequently on social media, etc.)
- **Achieve great results** (high search rankings, ratings, social engagement rates, and rates of AI recommendation)

The other three categories indicate a lack in one or both of these areas.



WHAT THE MOST VISIBLE BRANDS DO DIFFERENTLY



- Leading brands treat **accuracy as a strategic asset** — especially on Google Maps, Yelp, Facebook, and business websites
 - Top performers actively manage **100% of Google profiles** and **93% of Yelp profiles**, and establish Facebook pages for at least **80% of store locations**
- They **go beyond presence to differentiation**, investing in detailed content to stand out in selective AI answers
 - Top performers are recommended at least **6.4% of the time on ChatGPT, 21.7% on Gemini, and 16.9% on Perplexity**
- They **win on reputation** so they'll be chosen as the “best” by AI
 - Top performers have a **4.5 average rating on Google** and **3.7 on Yelp**
- They **optimize traditional and AI channels** together
- They treat **search and social as one system (87% link social profiles to Google)**



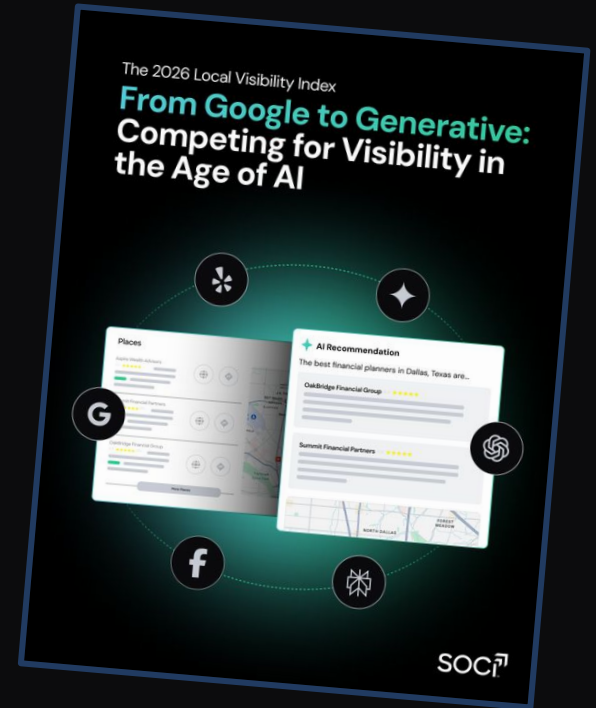
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Thank You