

GRACKERAI RESEARCH REPORT

The Zero-Click Impact on Cybersecurity Pipeline

Quantifying Invisible Demand

Published February 2026 · Analysis Period: 2024–2026 · Google AI Overviews, ChatGPT, Perplexity

Executive Summary

The cybersecurity demand generation model is built on a faulty assumption: that every buyer who discovers your brand will visit your website. In reality, the majority of search-driven discovery now happens without a click — in AI-generated responses, Google AI Overviews, and featured snippets where buyers learn about vendors without ever visiting vendor websites.

60%

of all Google searches now end without a click to any external website (SparkToro / Datos)

40%

of B2B buyers now use AI assistants — completely invisible to traditional web analytics

34.5%

average drop in organic CTR when a Google AI Overview appears (Seer Interactive, 2024)

\$0

attributed pipeline from AI-influenced deals in most cybersecurity companies' analytics

1. Understanding Zero-Click Search

Zero-click search occurs when a query is answered directly in search results — through featured snippets, knowledge panels, or AI-generated overviews — without requiring a click to any website. For cybersecurity marketers: your brand can be discovered, evaluated, and shortlisted by a buyer who never visits your website.

The Three Zero-Click Channels

Channel	How It Works	Measurability
Google AI Overviews	AI summary above organic results for ~16% of searches	Partial — GSC shows AIO impressions
AI Assistants (ChatGPT, etc.)	Buyers ask questions directly — no Google at all	Very Low — mostly invisible
Featured Snippets	Google extracts direct answers at position zero	Moderate — GSC tracks impressions

2. Quantifying the Pipeline Blind Spot

Metric	Visible (Analytics)	Invisible (Zero-Click/AI)	Estimated Gap
Brand impressions	100% of tracked organic	2–5x additional in AI responses	50–80% unmeasured
Research sessions	All website visits	AI conversations, zero-click sessions	40–60% invisible
Pipeline influenced	Multi-touch attributed	AI-influenced shortlisting	30–50% unattributed
First-touch attribution	"Organic search," "referral"	Shows as "direct" or "branded search"	20–30% misattributed

Bottom Line: If your company generates \$10M in annual pipeline from search channels, the true search-influenced pipeline is likely \$15–20M — but \$5–10M is invisible because it flows through zero-click and AI channels your analytics can't track.

3. Traditional vs. Zero-Click Buyer Journey

Traditional (Pre-2024): Search Google → Click blog post (tracked) → Explore product pages (tracked) → Download whitepaper (tracked) → Return for demo (tracked). Every step visible.

Zero-Click (2025+): Ask ChatGPT (invisible) → ChatGPT recommends 4 vendors (invisible) → Ask Perplexity to compare top 2 (invisible) → Search brand name → Demo request. Three of five steps invisible. AI influence receives zero attribution.

4. Google AI Overviews Impact

Query Type	AIO Trigger Rate	Impact on Organic CTR	Example
Definition / "What is"	45–55%	-50 to -60%	"What is zero trust architecture"
Comparison / "vs"	25–35%	-30 to -40%	"CrowdStrike vs SentinelOne"
"Best tools" / Category	30–40%	-35 to -45%	"Best SIEM tools 2026"
How-to / Implementation	35–45%	-25 to -35%	"How to implement DMARC"
Branded search	10–15%	-5 to -15%	"CrowdStrike Falcon features"

Key Insight: Optimizing for AIO citation is more valuable than organic ranking for any keyword where AIOs appear. Visits may decrease, but brand influence per search increases — if you're cited.

5. The Pipeline Impact Model

Pipeline Layer	% of AI Pipeline	Measurability	Impact per \$1M organic
Layer 1: Direct AI referral	5–15%	Fully trackable	\$50K–\$150K
Layer 2: AI-influenced branded search	25–35%	Estimable via correlation	\$250K–\$350K
Layer 3: AI dark funnel	50–60%	Self-reported only	\$500K–\$600K
Total AI-Influenced	100%	—	\$800K–\$1.1M additional

6. Measurement Strategies

- **Self-reported attribution:** Add "AI assistant" as discovery option on demo forms. Companies report 15–25% of demos citing AI.
- **Branded search correlation:** Track branded search volume changes alongside AI visibility improvements (2–4 week lag).
- **AI visibility score tracking:** Weekly monitoring across platforms. Correlate with pipeline over 3–6 months.
- **Referrer analysis:** Aggregate Perplexity referrals, partial ChatGPT data, and GSC AIO impression gaps.
- **Conversation intelligence:** Analyze sales call recordings for AI mentions ("ChatGPT recommended you").

7. Strategic Responses

Shift from traffic-first to citation-first. Measure success by citation rate, not organic sessions. Create content designed to be extracted and cited, not just visited.

Optimize for AI-referred visitors. When they do arrive, they're higher-intent. Reduce friction, validate the AI recommendation with social proof, and skip the basics.

Build brand into AI knowledge. Sustained multi-channel web presence creates "model memory" — the AI equivalent of top-of-mind brand awareness.

8. The CFO Conversation

Key Message: "Our organic traffic is declining not because our SEO is failing, but because the way buyers search is fundamentally changing. 60% of searches end without a click, and 40% of our buyers use AI assistants. We need to invest in being visible where buyers are actually looking — and right now, our competitors are there and we're not."

About This Research

Synthesizes data from SparkToro/Datos, Seer Interactive, GrackerAI platform analytics, Forrester, SE Ranking, and 10Fold Communications. Pipeline estimates modeled from anonymized cybersecurity client data. GrackerAI is the pioneering AI-powered AEO and GEO platform for B2B SaaS companies.

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