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WHO'S WINNING IN AI SEARCH:

Top Websites Visible in AI Search Across Industries

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Introduction:

The way people discover brands is being rewritten. With Large Language Models (LLMs) and AI Overviews now influencing billions of daily searches, the rules of visibility have shifted. For CEOs, CMOs, and decision makers, the critical question is no longer just “Where do we rank in Google?” but “Are we being cited, surfaced, and trusted in AI-driven answers?”

This report provides a category-by-category analysis of the brands and domains gaining the most traction in LLM referrals and AI Overviews. We cover ten key sectors where AI visibility has the potential to reshape competition:



Social Networks & Online Communities (People & Communities)



Travel (Accommodation & Hotels)



Banking, Credit & Lending (Banking)



Health (Pharma & Biotech, Healthcare)



Finance (Accounting, Auditing, Investing & Insurance)



Marketplace



Jobs & Careers (Job Sites)



Consumer Electronics



Real Estate

Across these industries, we identify:



Market Leaders

Brands that dominate both traditional and AI-driven visibility



Lagging Leaders

High organic traffic brands underperforming in AI results.



Emerging Threats

Smaller players winning outsized visibility through AI inclusion.



Platform Trends

How ChatGPT, Perplexity, Gemini, and others are reshaping competitive dynamics.

The implications are clear: AI visibility is no longer optional. The brands that learn how to optimize for LLMs and AI Overviews today will be the ones capturing discovery, trust, and growth tomorrow.

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CONSUMER ELECTRONICS



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Consumer Electronics: AI Search Winners & Market Shifts

The consumer electronics sector sits at the intersection of innovation and everyday utility, where brand visibility directly influences purchase intent. In this analysis among consumer giants, we see that Apple and Samsung dominate both LLM and AIO traffic. Apple leads with the highest AIO traffic at **22,861,214** highlighting its strong brand presence and consumer engagement across digital platforms.

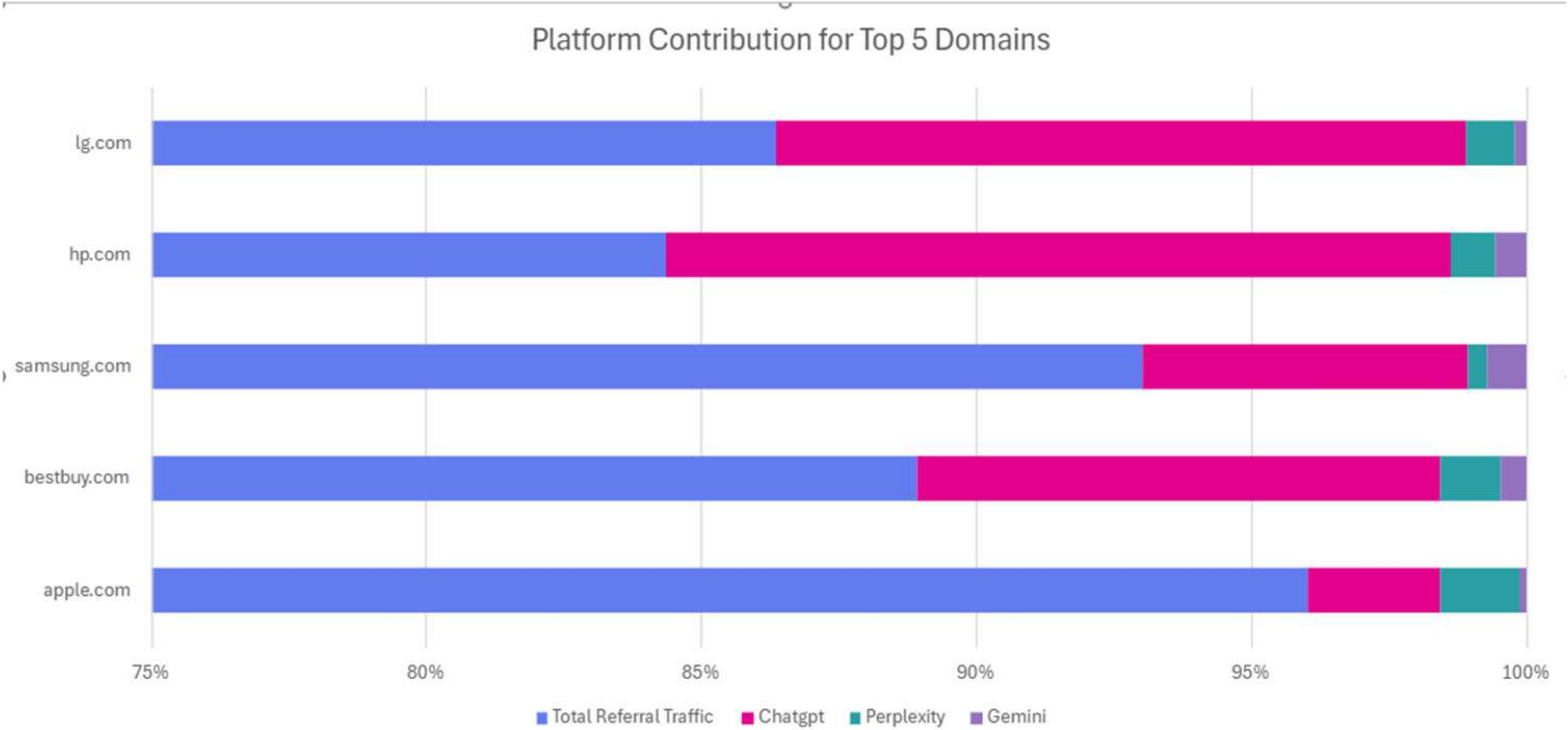
Below is a detailed analysis of traffic among the leading players in the consumer electronics sector:



Takeaway:

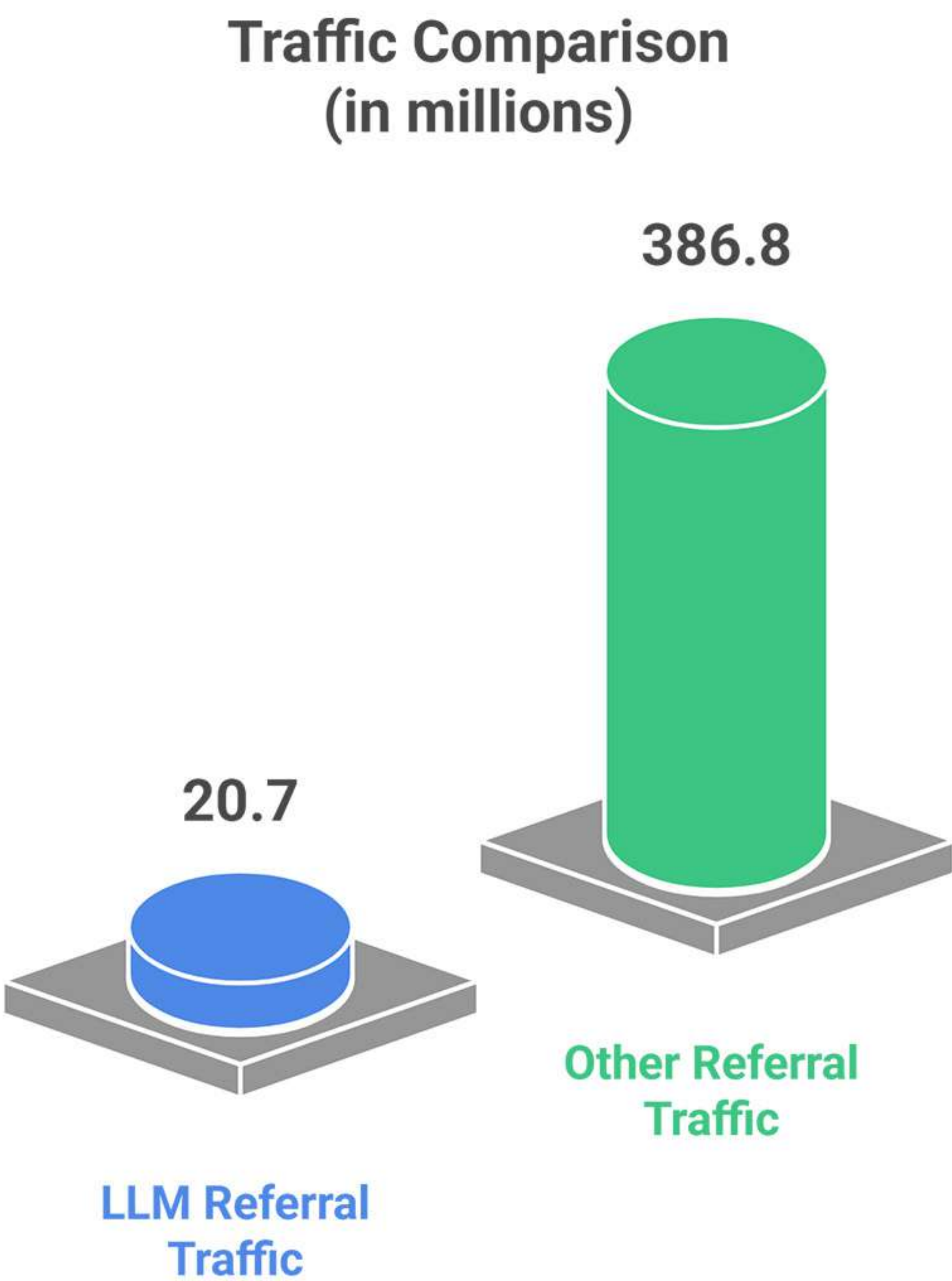
Consumer electronics giants dominate AI search visibility, but niche sites are emerging as stealth leaders. Samsung and Apple maintain a strong presence in both LLM and AIO traffic.

The category is led by mega-brands, but platform performance varies widely. Samsung takes a decisive lead, with Apple following closely yet leaning more on Perplexity traffic.



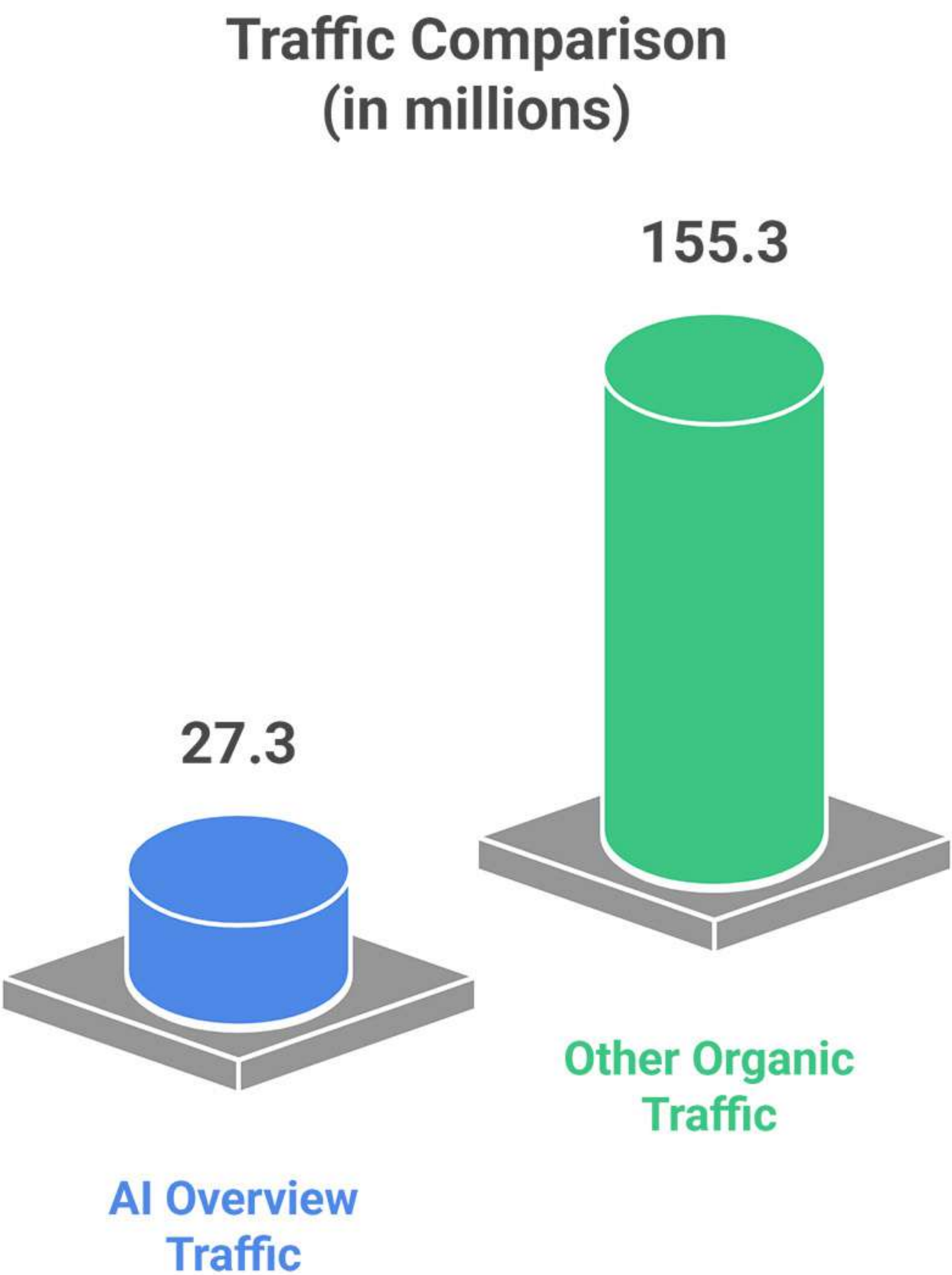
LLM Referral Traffic vs Total Referral Traffic

LLM referrals are becoming a meaningful traffic source, though they still represent a small share of total referrals for the category.

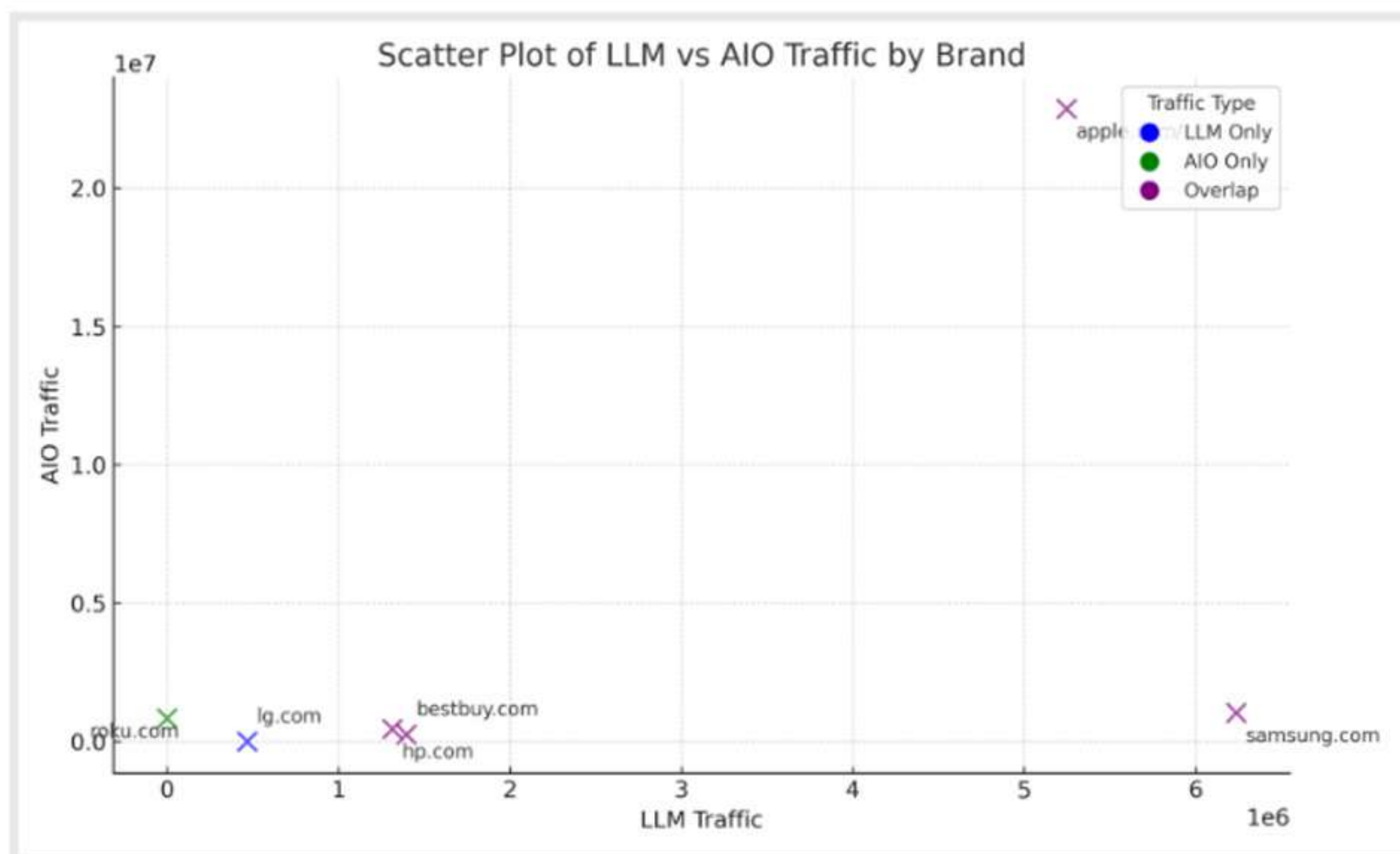


AI Overview Traffic vs Total Organic Traffic

AI Overviews are already a significant driver of organic traffic in consumer electronics, accounting for a notable share of visibility.



Large brands don't always dominate in AI-driven search results. In consumer electronics, some leaders excel in both organic and LLM visibility, while others underperform despite strong SEO. Meanwhile, smaller niche sites are leveraging AI citations to capture visibility that far outweighs their overall size.

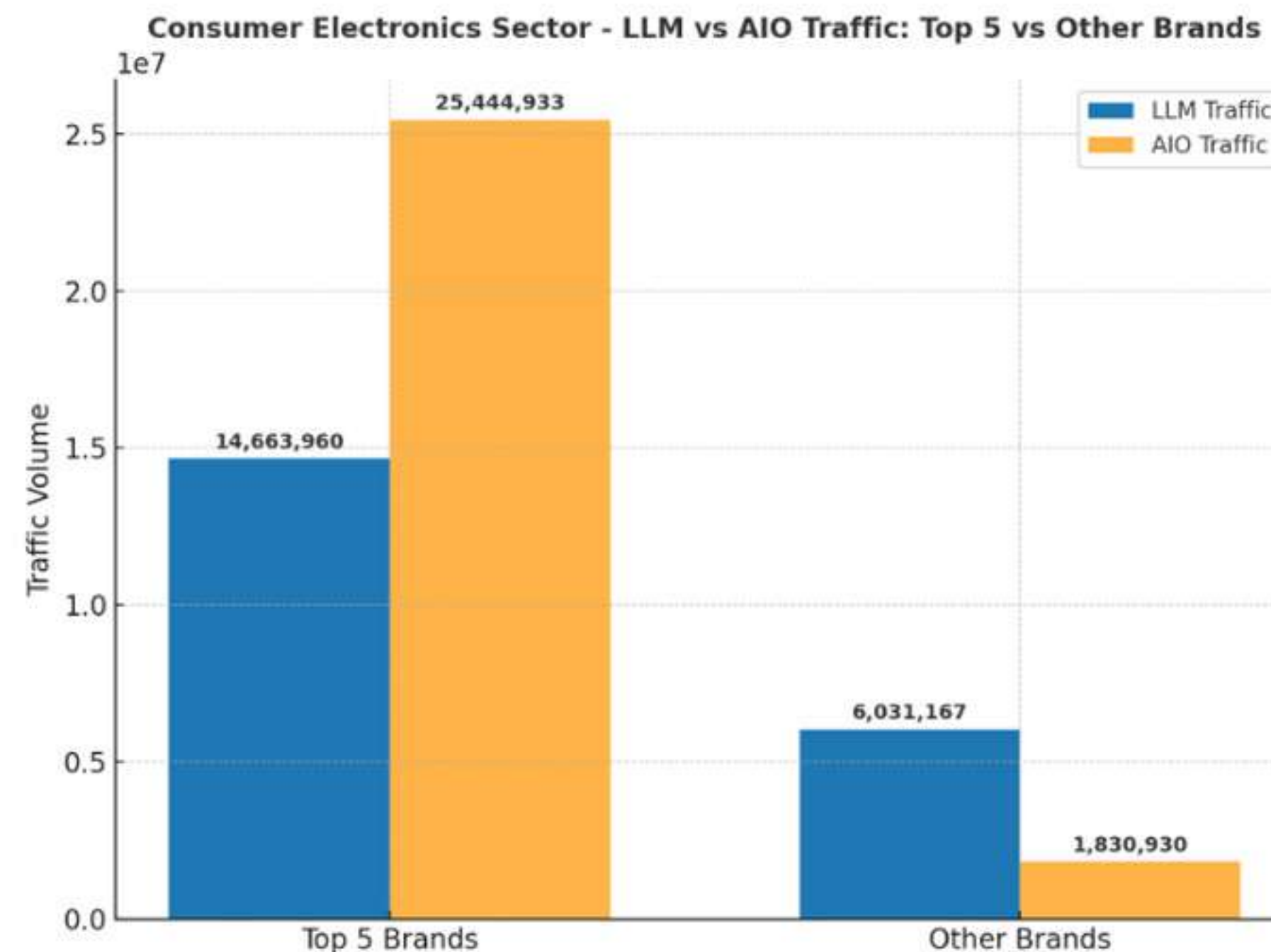


- » **Apple.com** is a clear outlier – It dominates in AIO traffic (22.8M) while also having strong LLM traffic (5.2M), indicating its high visibility across both.
- » **Samsung.com** shows a balanced presence – With high LLM traffic (6.2M, the highest among LLMs) but comparatively lower AIO traffic (1M).
- » **HP and BestBuy** overlap but skew LLM-heavy – Both have moderate LLM traffic (1.3M each for HP & BestBuy) but much lower AIO traffic (454K for HP and 253K for BestBuy), highlighting dependency on LLM exposure rather than AIO.
- » **AIO-only brands (Roku.com)** – Despite no visible LLM traffic, Roku gains substantial AIO traffic (839K), suggesting AIO platforms may be more favourable for certain consumer tech brands.

Takeaway:

High organic traffic doesn't guarantee AI dominance and small players can compete if they optimize for AI inclusion.

Market Share Analysis: LLM and AIO Traffic Distribution Among Top 5 and Other Brands



Takeaway:

- » Top 5 brands dominate LLM traffic: They account for 71% (14,663,960 visits) compared to only 29% (6,031,167 visits) for all other brands combined.
- » AIO visibility is even more concentrated: The Top 5 brands capture 93% (25,444,933 visits) of AIO traffic, leaving just 7% (1,830,930 visits) for other competitors.
- » Greater skew toward AIO leadership: While LLM traffic shows some balance between top and other brands, AIO traffic is heavily dominated by established leaders, limiting space for smaller players.
- » Implication for strategy: Smaller consumer electronics brands have relatively more opportunity to compete within LLM visibility, but AIO remains dominated by market giants, suggesting differentiated optimization is critical.

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TRAVEL



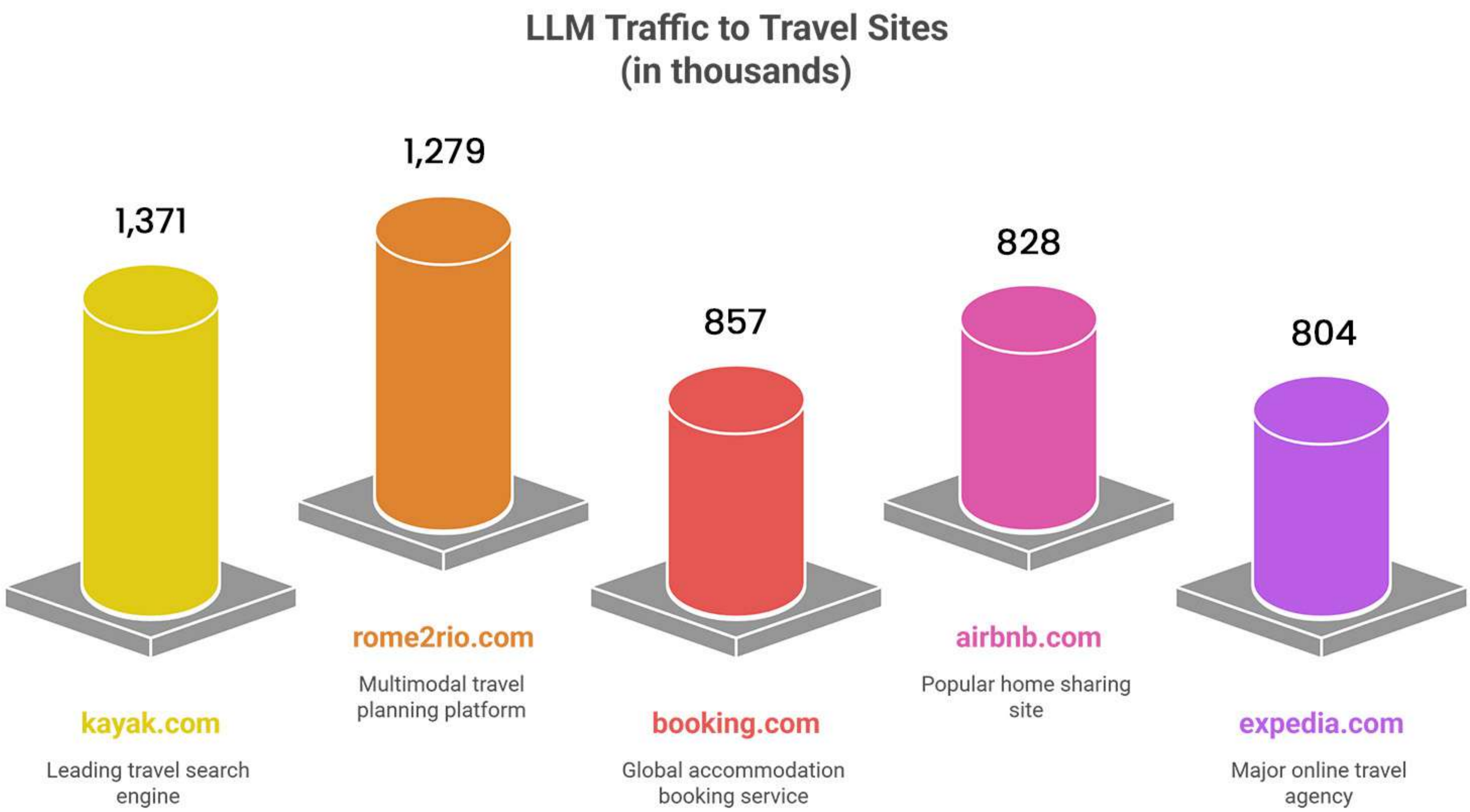
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Travel

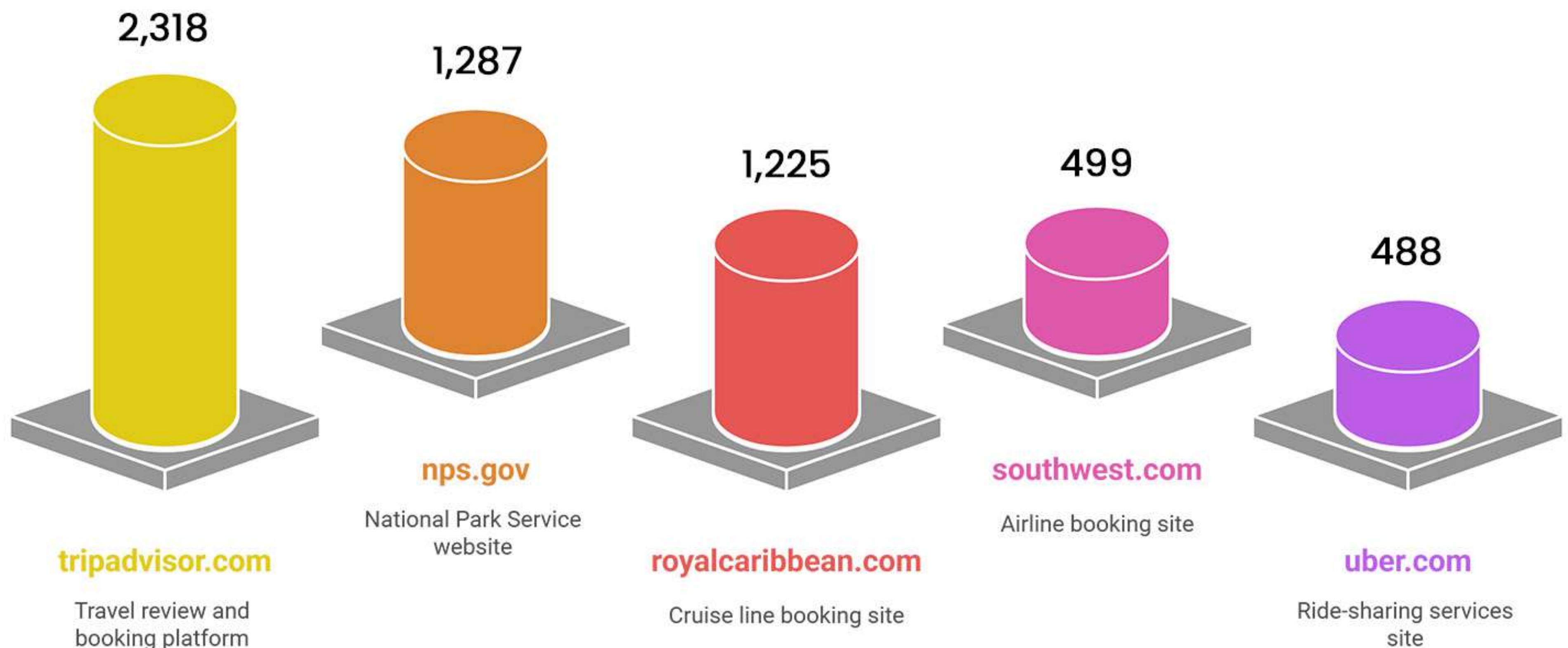
The travel sector is a highly dynamic space where user decisions are shaped by convenience, trust, and brand familiarity. From flight bookings and accommodations to trip planning and transportation, digital discovery plays a critical role in influencing consumer journeys. With the rise of Large Language Models (LLMs) and AI Overviews, new gateways for visibility are emerging, redefining how travelers find and select services. This analysis highlights how leading travel brands perform across LLM and AIO traffic, uncovering gaps, overlaps, and opportunities that signal how competitive advantage in this sector is being reshaped by AI-driven discovery.



Distinct Winners in LLM vs AIO for the Travel Sector



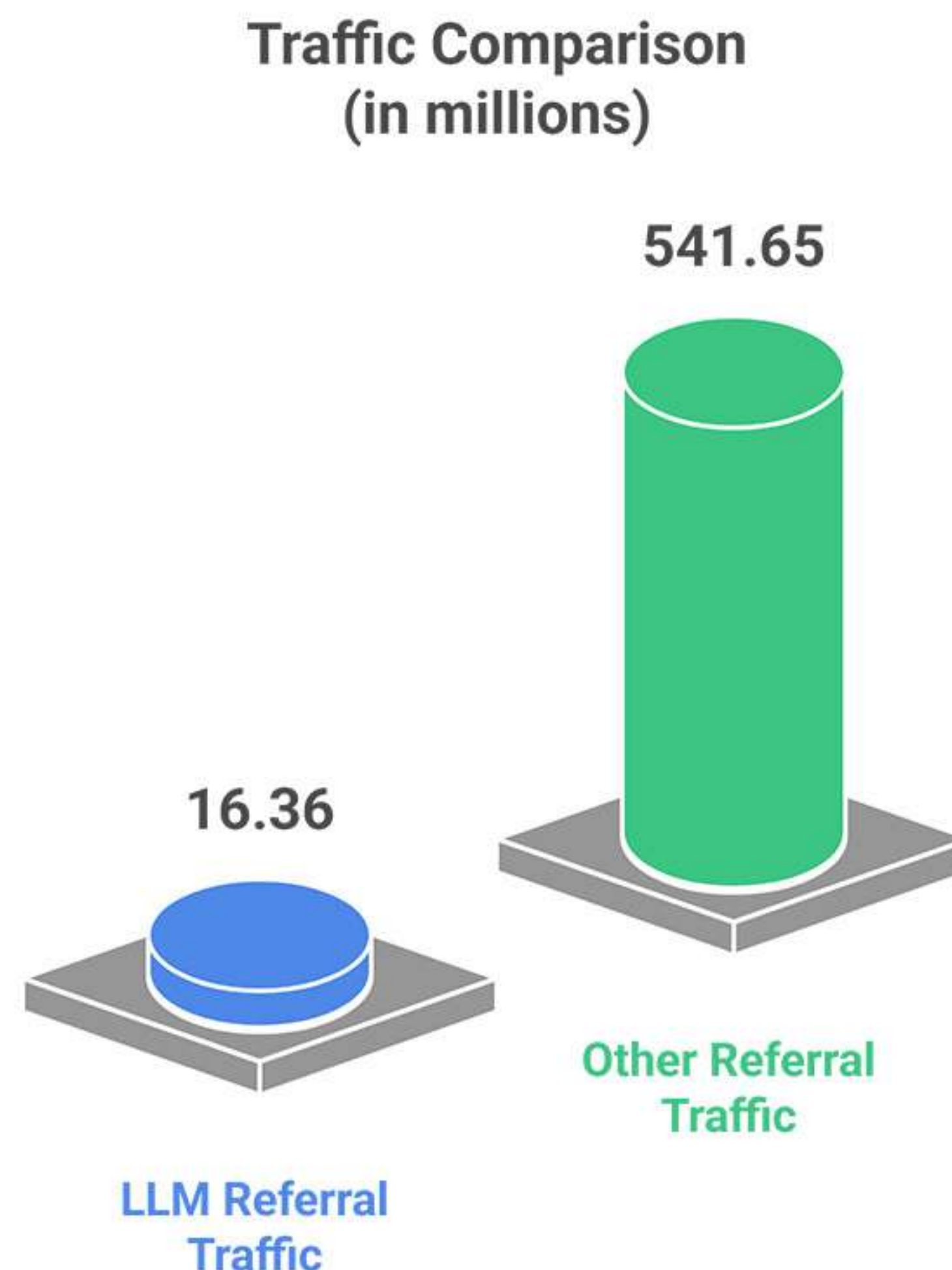
AIO Traffic to Travel Sites (in thousands)



Key Insight:

There is no overlap between brands driving the highest LLM traffic and those leading in AIO traffic. Platforms like kayak.com and rome2rio.com dominate LLM visibility but are absent from AIO traffic, while tripadvisor.com and nps.gov lead AIO performance without significant presence in LLM-driven referrals. This stark divide signals that LLM and AIO require distinct optimization strategies in the travel sector.

LLM Referral Traffic vs Total Referral Traffic



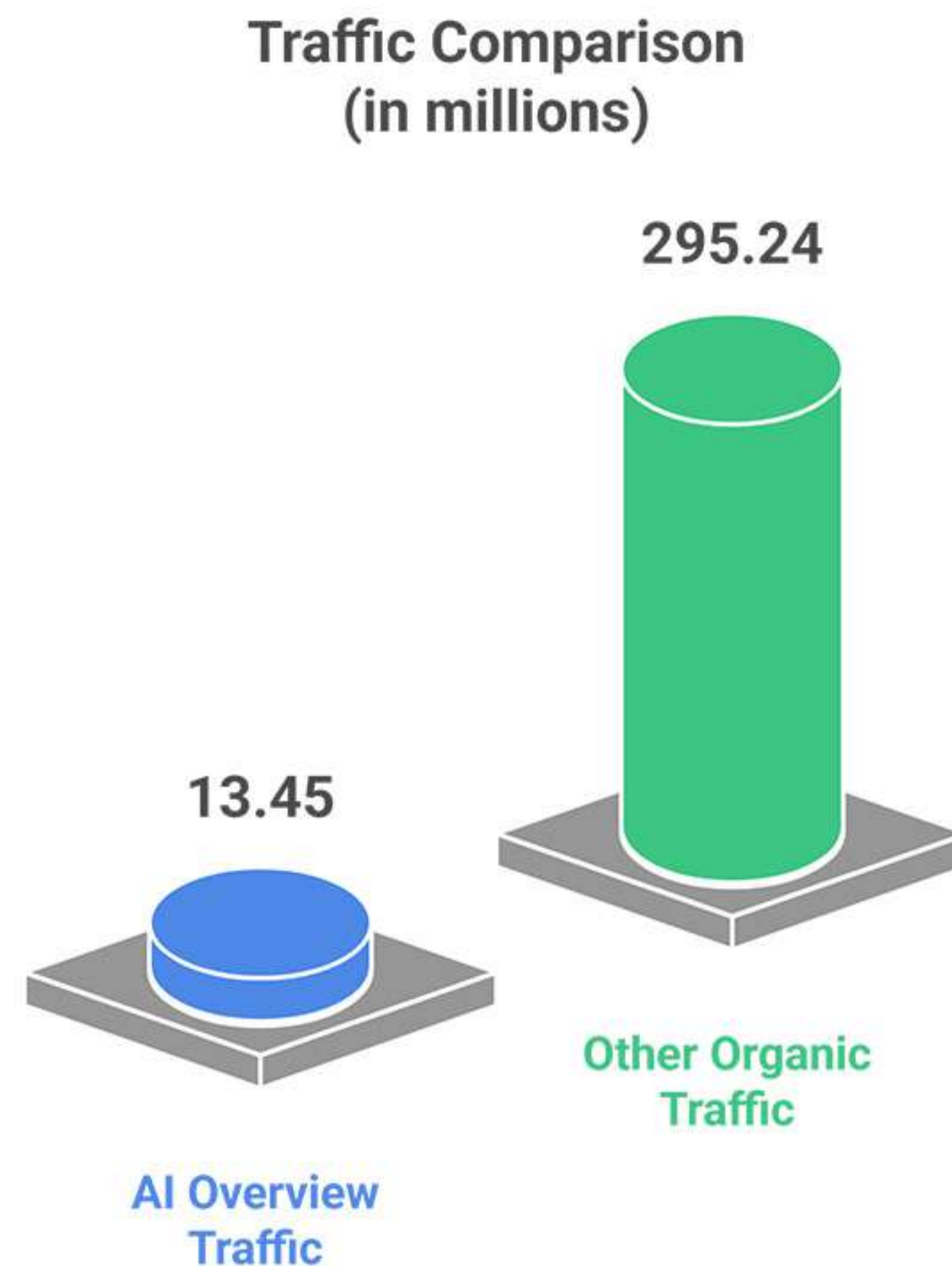
» **LLM Referral Traffic: 16,366,942**

» **Total Referral Traffic: 541,658,463**

Key Insight:

LLM-driven referrals currently account for only about 3% of total referral traffic in the Travel sector. This suggests that while AI-driven visibility is emerging, traditional referral channels remain dominant. Brands have a strategic opportunity to invest early in LLM optimization to gain a competitive edge as AI-powered search influence grows.

AI Overview Traffic vs Total Organic Traffic



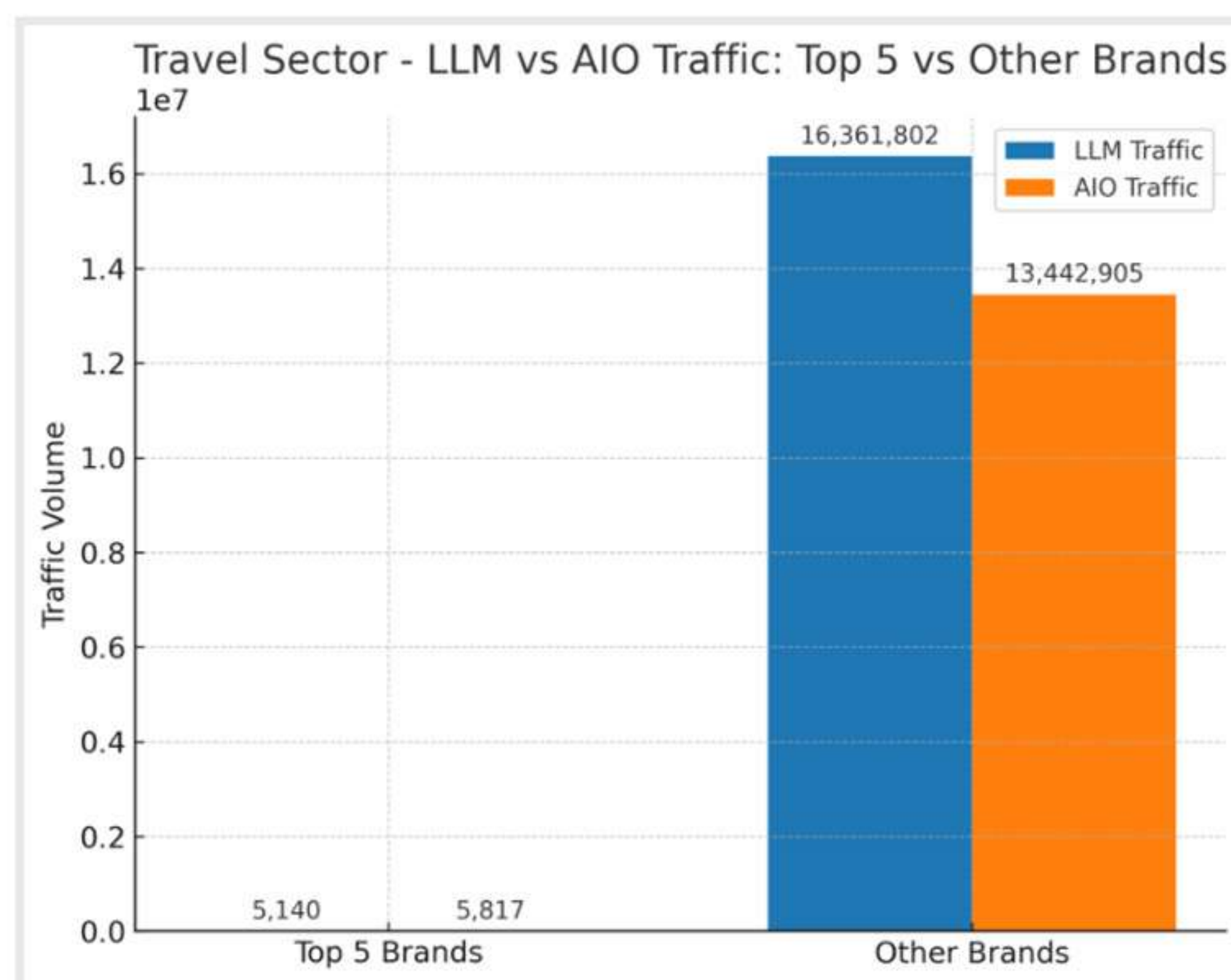
» **Total Organic Traffic: 295,243,679**

» **AI Overview Traffic: 13,448,722**

Key Insight:

AI Overview traffic makes up just 5% of total organic traffic in the Travel sector. This indicates that while AI-driven discovery is growing, traditional search visibility continues to dominate. Brands that optimize early for AI Overview placements can capture incremental traffic and position themselves for stronger visibility as AI-powered search adoption accelerates.

Market Share Analysis: LLM and AIO Traffic Distribution Among Top 5 and Other Brands



Key Insight:

- » LLM Traffic: The Top 5 brands capture just 0.03% of total traffic, with nearly 99.97% spread across other brands. This highlights extreme fragmentation, where visibility is overwhelmingly dominated by smaller and emerging players rather than established leaders.
- » AIO Traffic: Similarly, the Top 5 brands account for only 0.04% of traffic, with 99.96% captured by other brands. This again indicates a highly fragmented competitive field, even within AI Overview results.

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FINANCE



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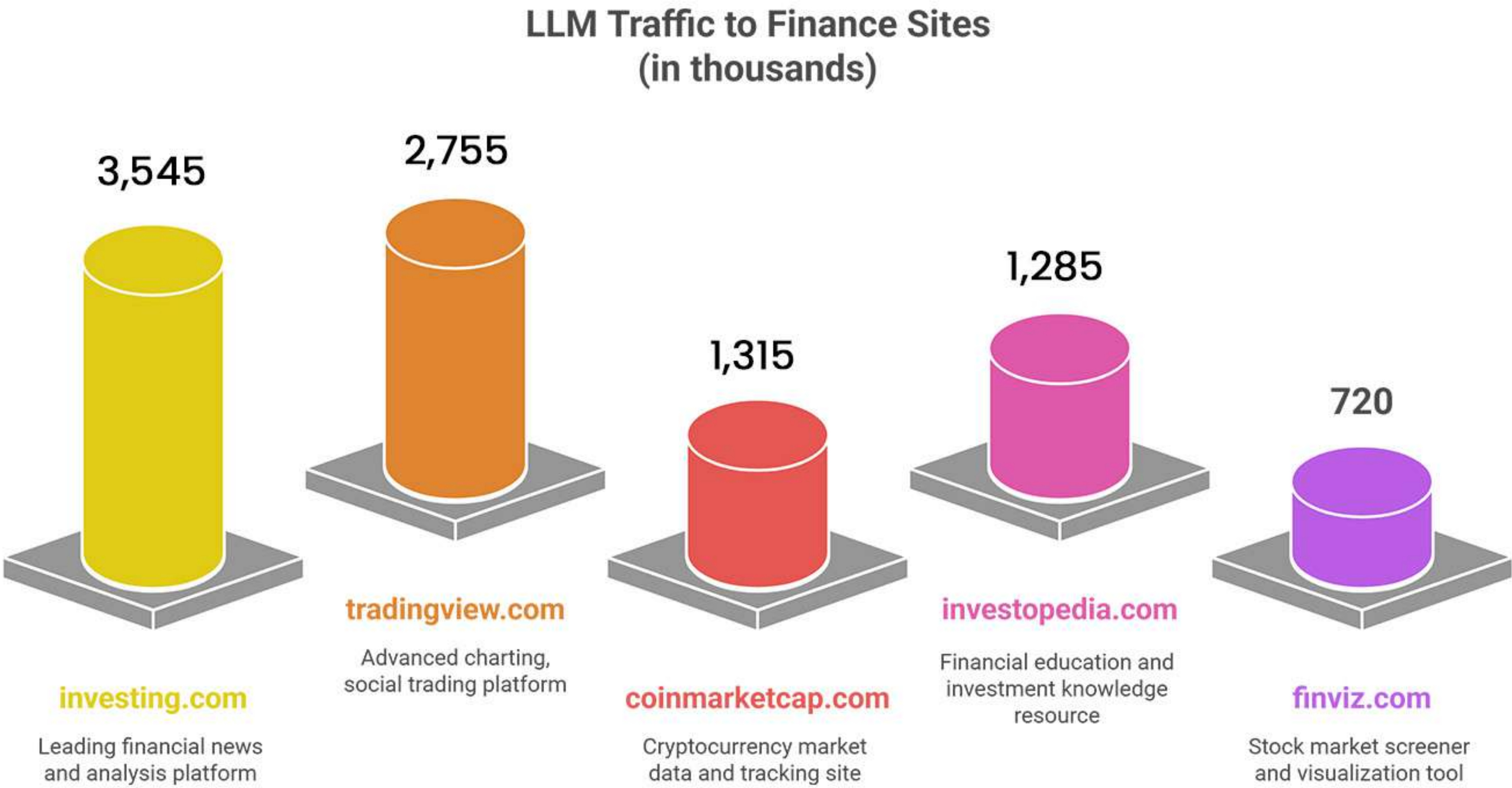
Finance

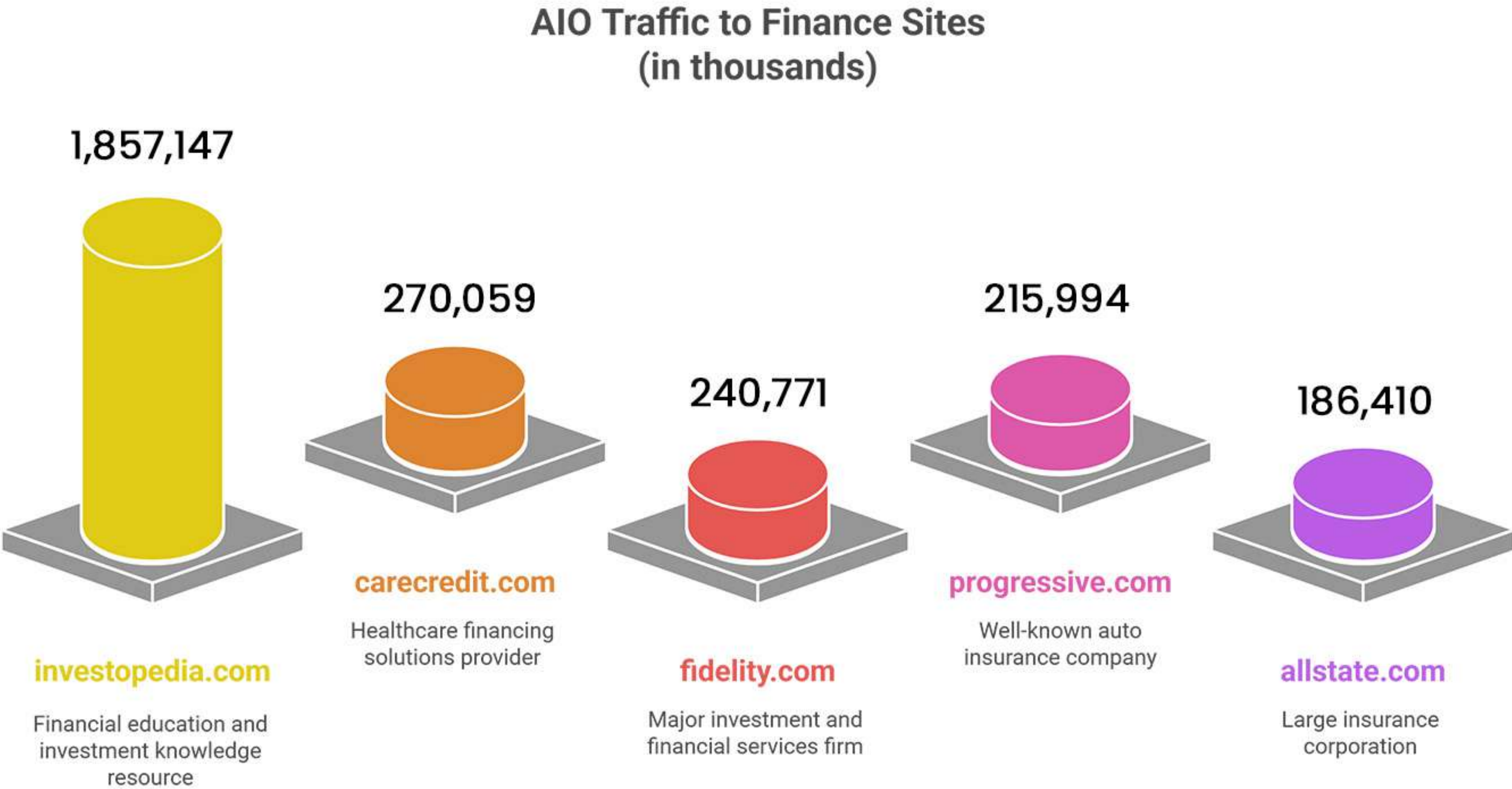
The finance sector operates in a space where credibility, authority, and trust are paramount. In this analysis among leading finance brands, we see that the top brands differ significantly for LLM and AIO traffic, with Investopedia.com being the only platform that ranks in both categories underscoring its broad visibility and adaptability across traffic sources.

Next slide is a detailed analysis of traffic among the major players in the finance sector.



The Divergence Between LLM Traffic Brands and AIO Traffic Brands





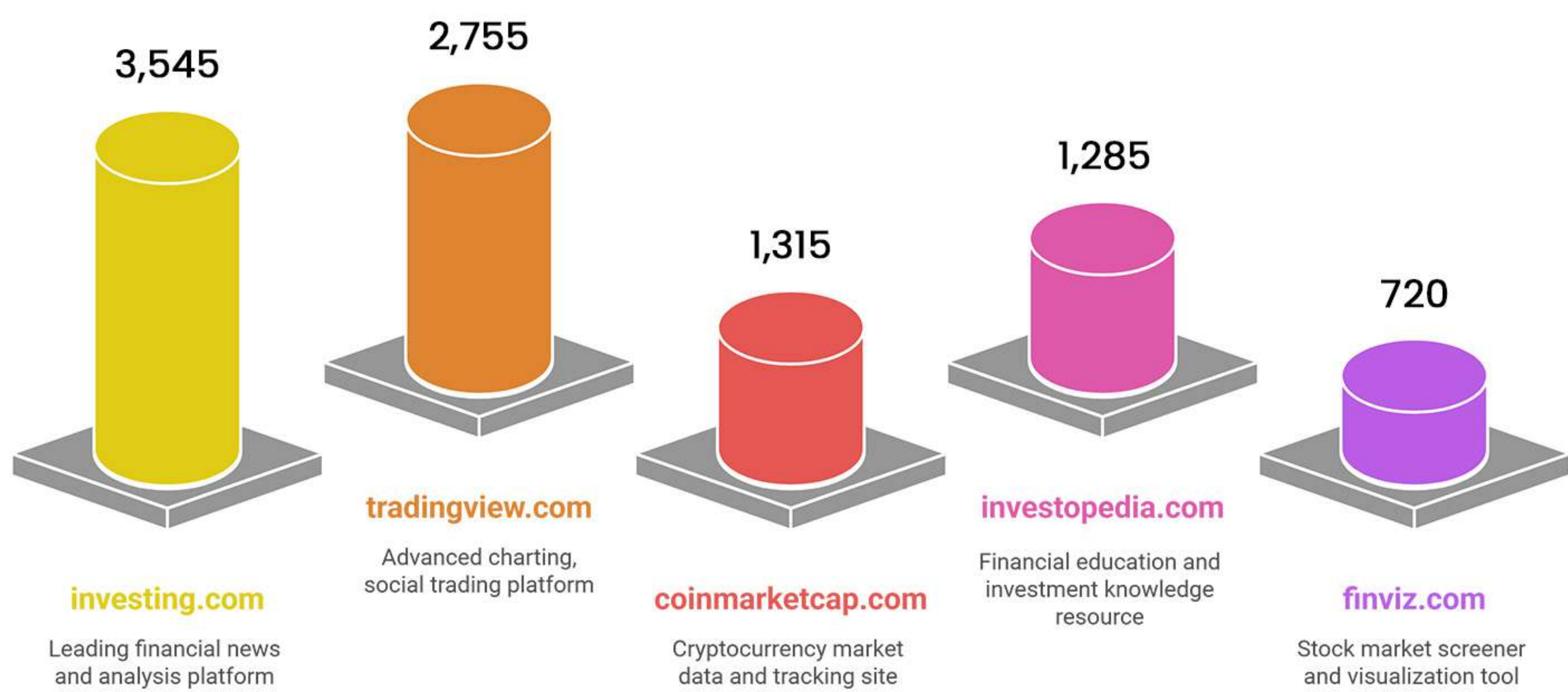
Key Insight:

Finance shows a clear split in AI visibility. Trading and market-intelligence platforms (Investing.com, TradingView, CoinMarketCap) dominate LLM citations, while educational and consumer financial services (Investopedia, Fidelity, Progressive) lead in AI Overviews. This highlights how real-time vs. trust-based content drives two very different discovery paths.

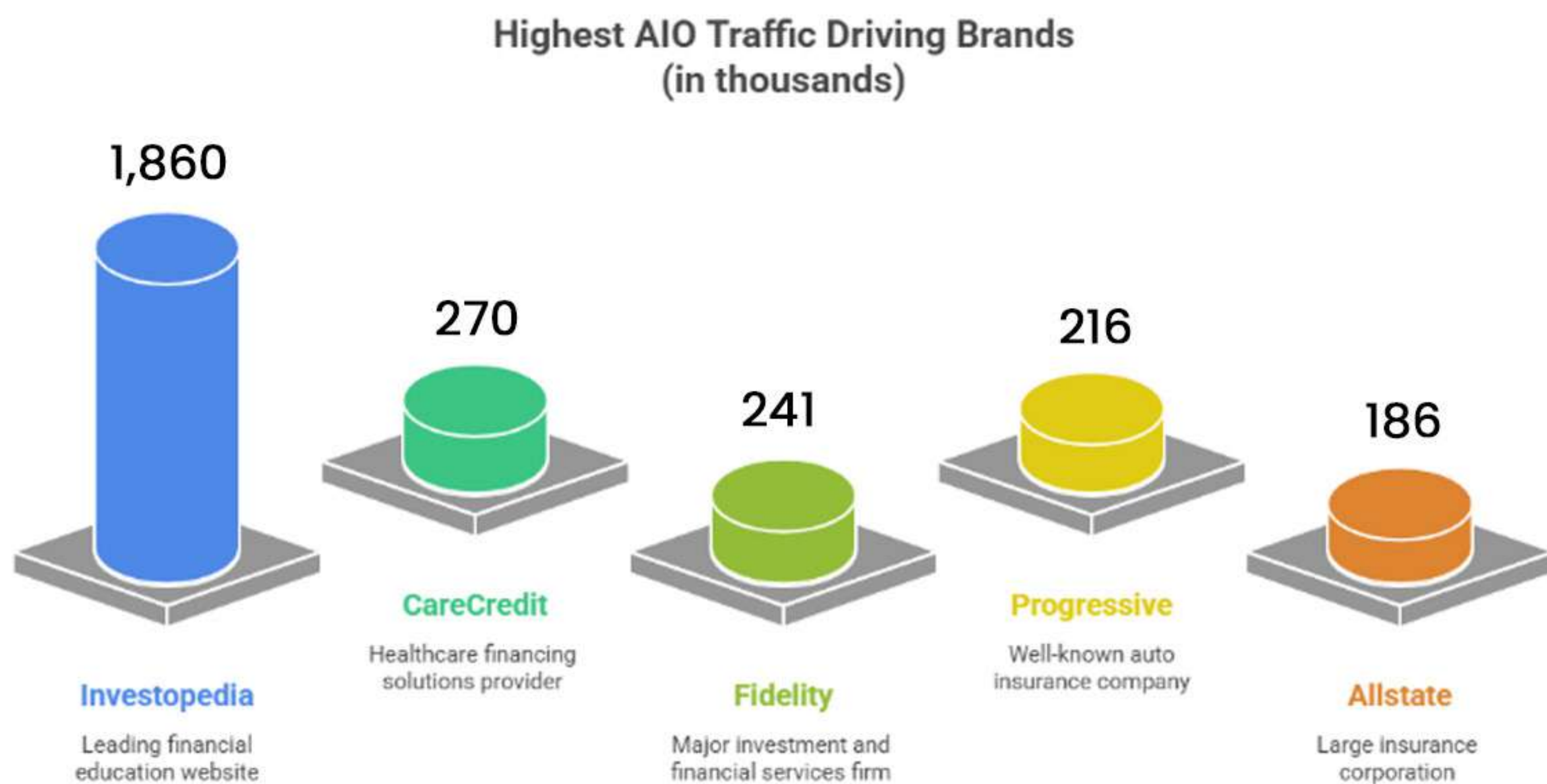
Platform Performance

LLM referrals are led by data-first platforms like Investing.com and TradingView, while AI Overviews lean on authority sites like Investopedia and trusted financial services. This contrast shows how different AI engines reward different strengths.

LLM Traffic to Finance Sites
(in thousands)



AI Overviews:

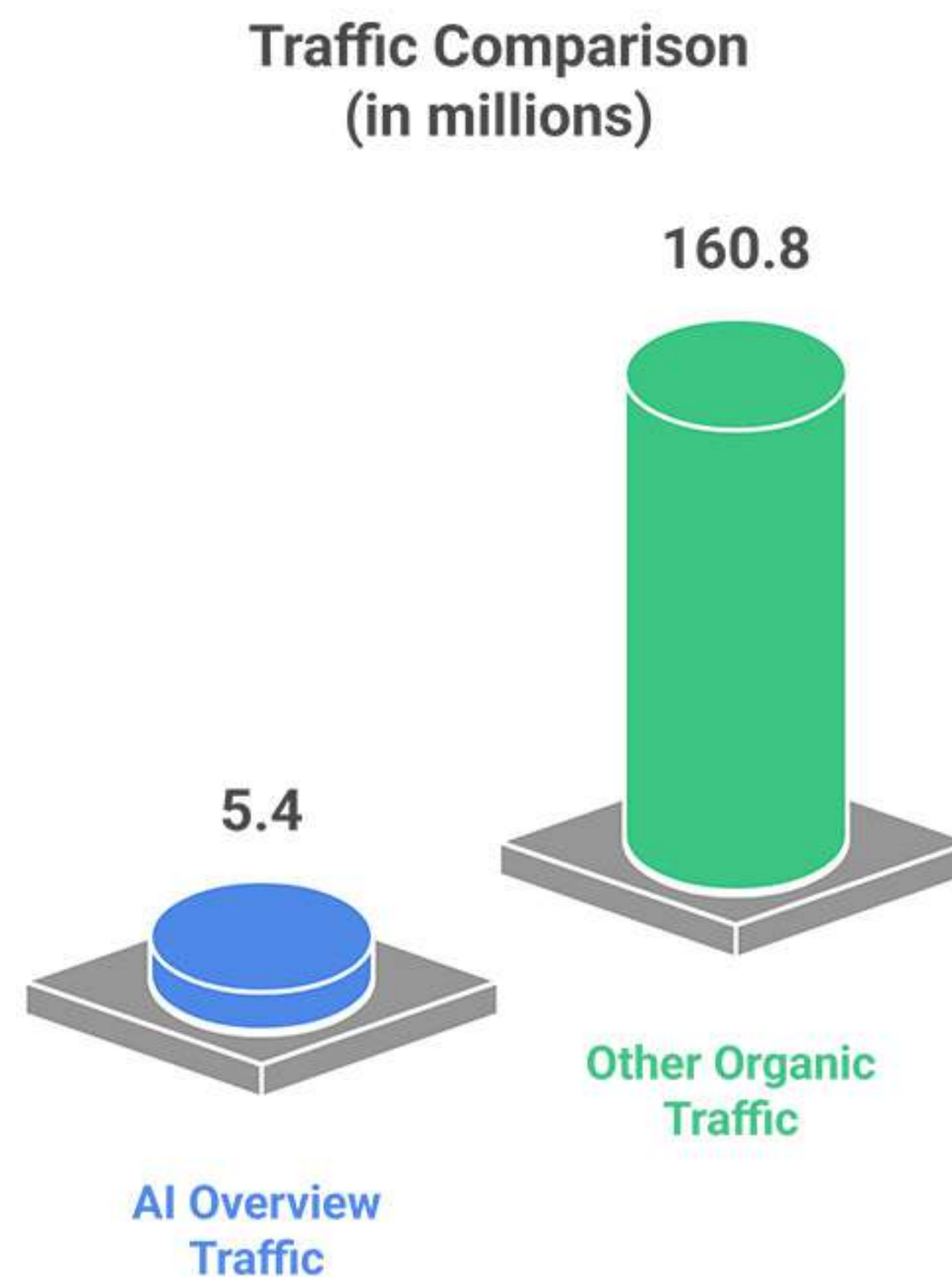


Takeaway:

LLMs reward **data-driven, real-time financial platforms**, while AI Overviews amplify **established, consumer-facing financial services and insurance brands**.

LLM Referral Traffic vs Total Referral Traffic

LLMs already account for 8% of referral traffic in finance, far higher than banking. Market data and trading platforms benefit most from this early adoption.



» **Total Referral Traffic: 233.6M**

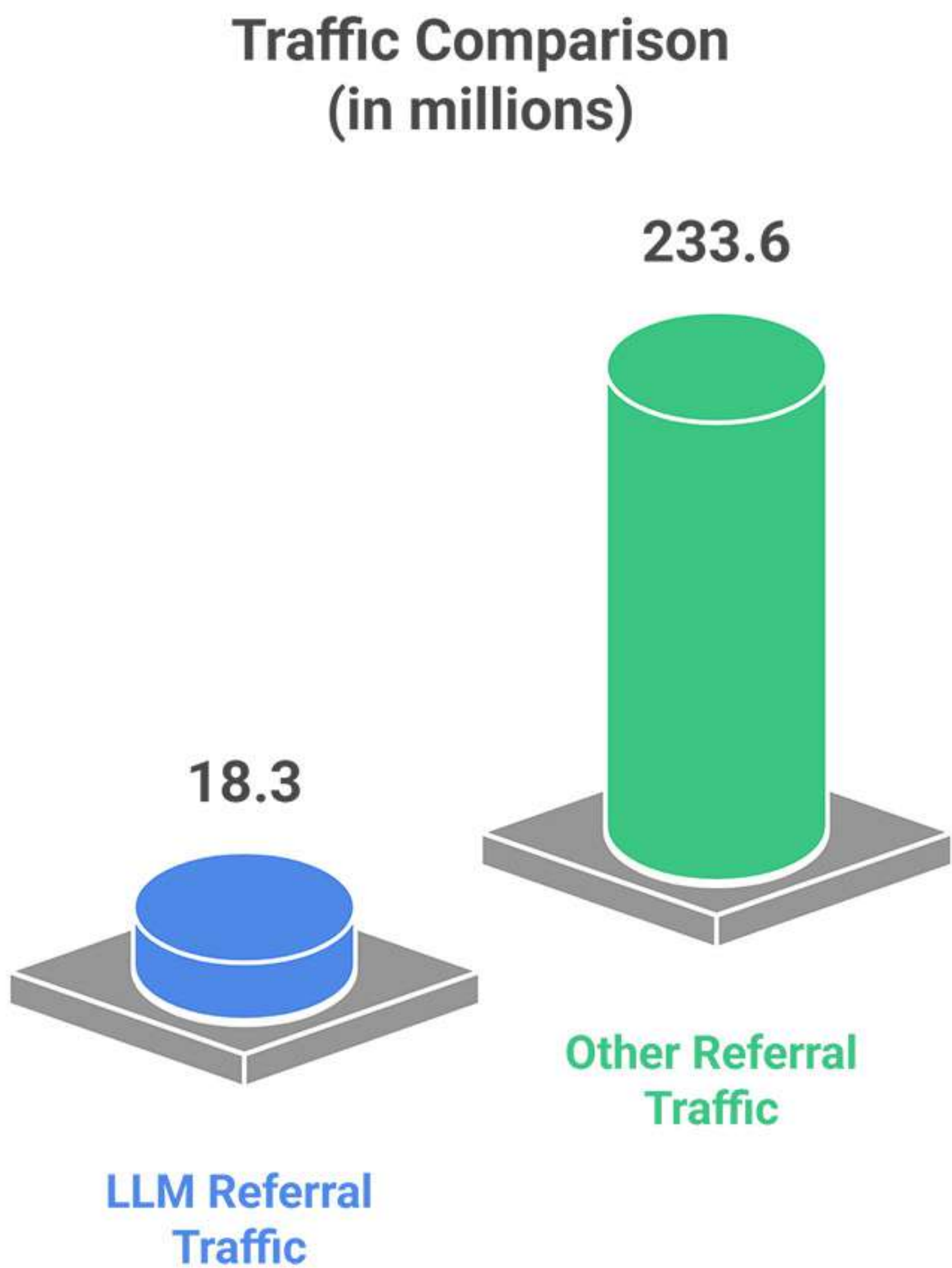
» **LLM Referral Traffic: 18.3M (~8%)**

Key Insight:

LLMs account for a higher share of referral traffic (8%) in finance compared to banking (1%), showing stronger traction in this sector.

AI Overview Traffic vs Total Organic Traffic

AI Overviews contribute 3% of organic traffic in finance. Though smaller than LLM share, they play a critical role for educational and consumer finance brands.

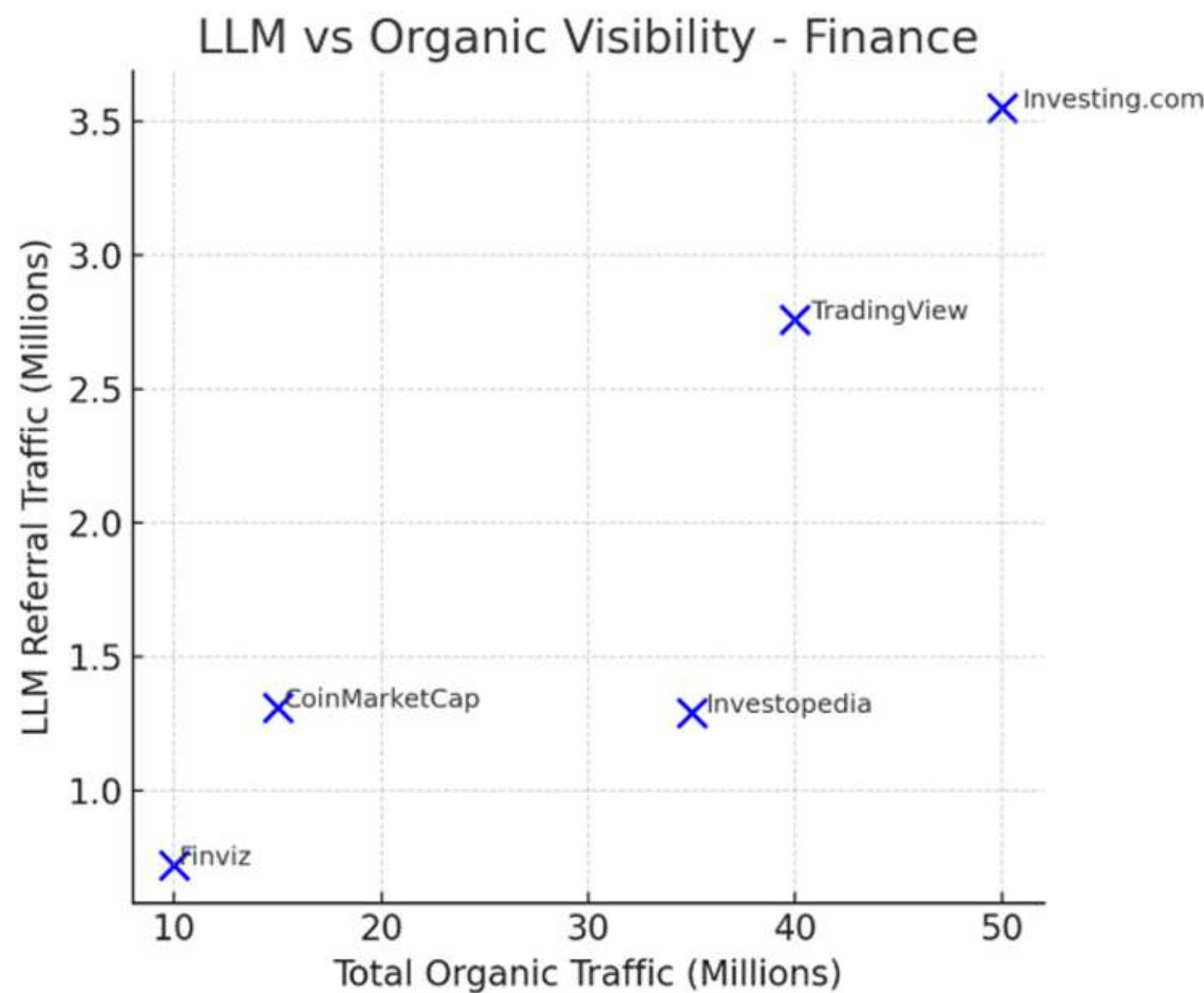


Insight:

AI Overviews are smaller but still meaningful at 3% of organic traffic, driven mainly by consumer-facing finance and insurance sites.

LLM vs Organic Visibility

LLMs lift real-time data platforms like Investing.com and TradingView, while niche platforms like CoinMarketCap and Finviz outperform relative to their organic scale.



» High Organic & High LLM

Investing.com, TradingView: Strong in both organic search and LLM citations.

» Low Organic & High LLM Share

CoinMarketCap, Finviz: Niche platforms with outsized LLM visibility.

» High Organic & Low LLM

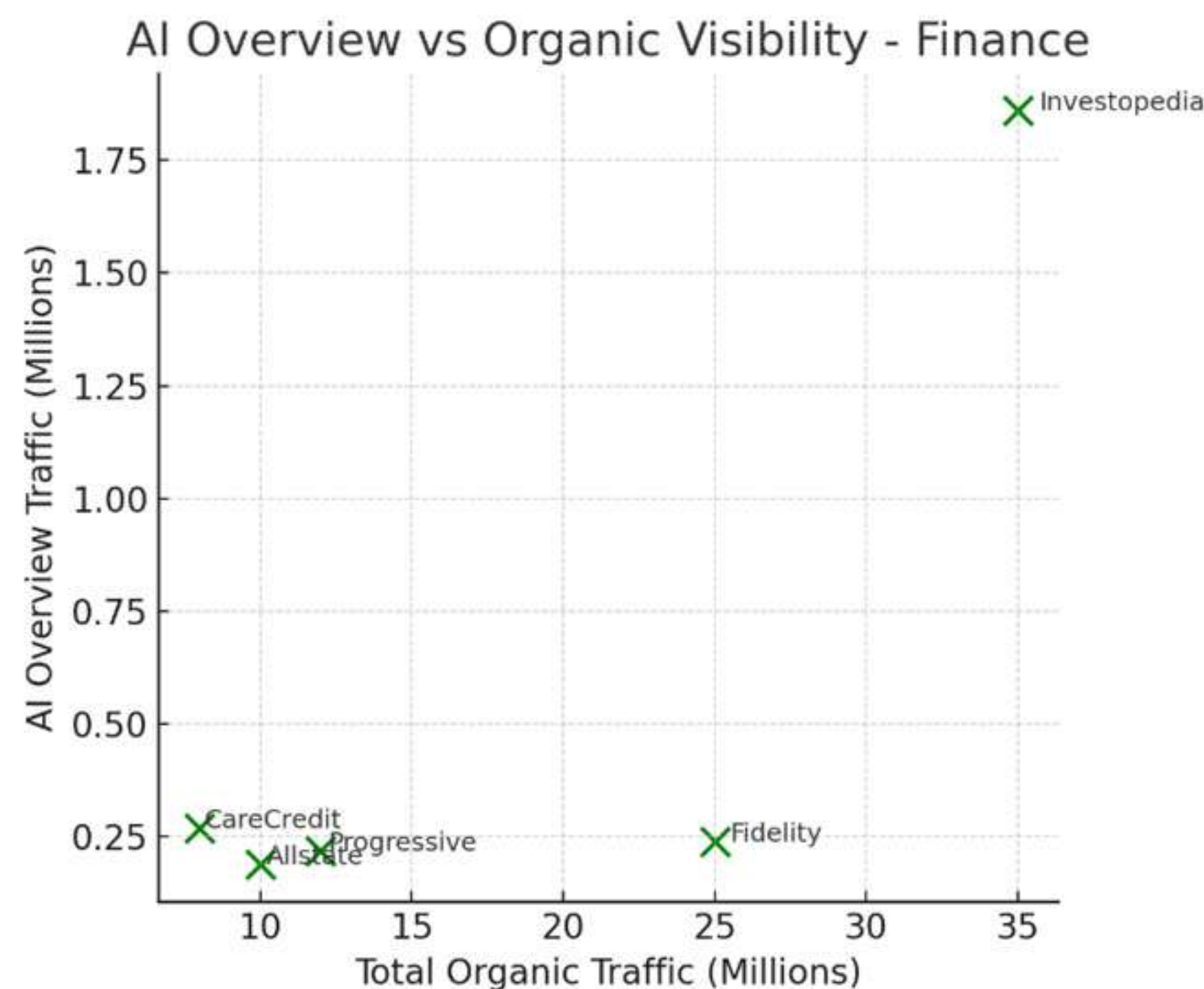
Fidelity: Heavy organic footprint but limited LLM traction.

Takeaway:

LLMs favor platforms with live data and niche communities, giving smaller players the chance to outshine larger institutions.

AI Overview vs Organic Visibility

Investopedia leads in both organic and AIO visibility, but smaller players like CareCredit and Progressive over-index in AI Overviews, punching above their weight in consumer-focused queries.



» High Organic & High AIO:

Investopedia: Performs strongly in both traditional SEO and AI Overviews.

» Low Organic & High AIO Share:

CareCredit, Progressive, Allstate: Niche consumer-facing services getting outsized AIO traction.

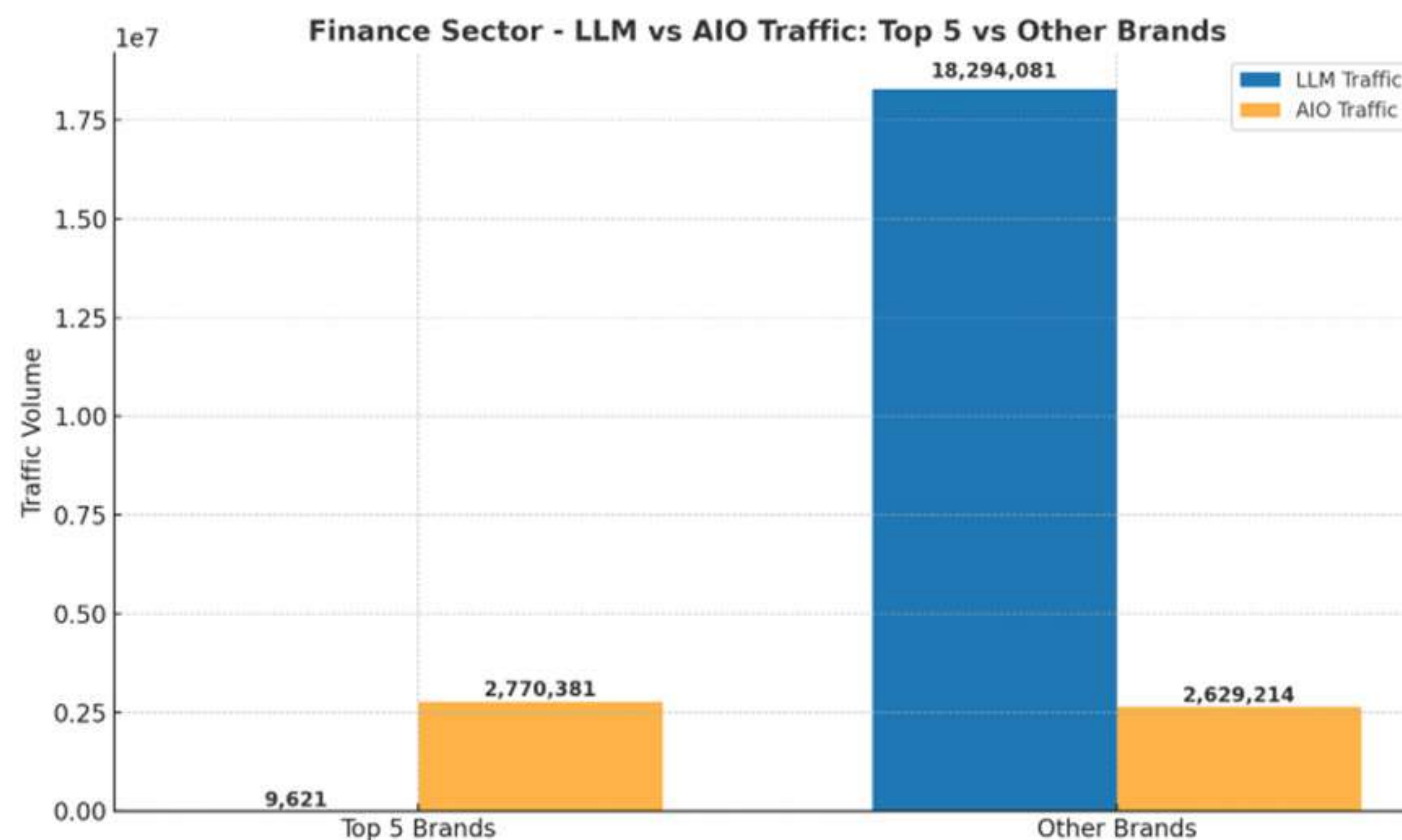
» High Organic & Low AIO:

Fidelity: Well-established in organic search but underrepresented in AI Overviews

Takeaway:

AI Overviews tilt toward consumer-oriented and explanatory content, often lifting insurance and financing brands into prominence over trading platforms.

Market Share Analysis: LLM and AIO Traffic Distribution Among Top 5 and Other Brands



Key Insight:

- » Top 5 Brands (LLM Traffic): Only 9,621, which is almost negligible compared to Other Brands.
- » Other Brands (LLM Traffic): Very high at 18,294,081, meaning the LLM channel is dominated by smaller players.
- » Top 5 Brands (AIO Traffic): Stronger presence with 2,770,381, holding just over half of AIO traffic.
- » Other Brands (AIO Traffic): Close at 2,629,214, making it a balanced split in AIO traffic.

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HEALTH



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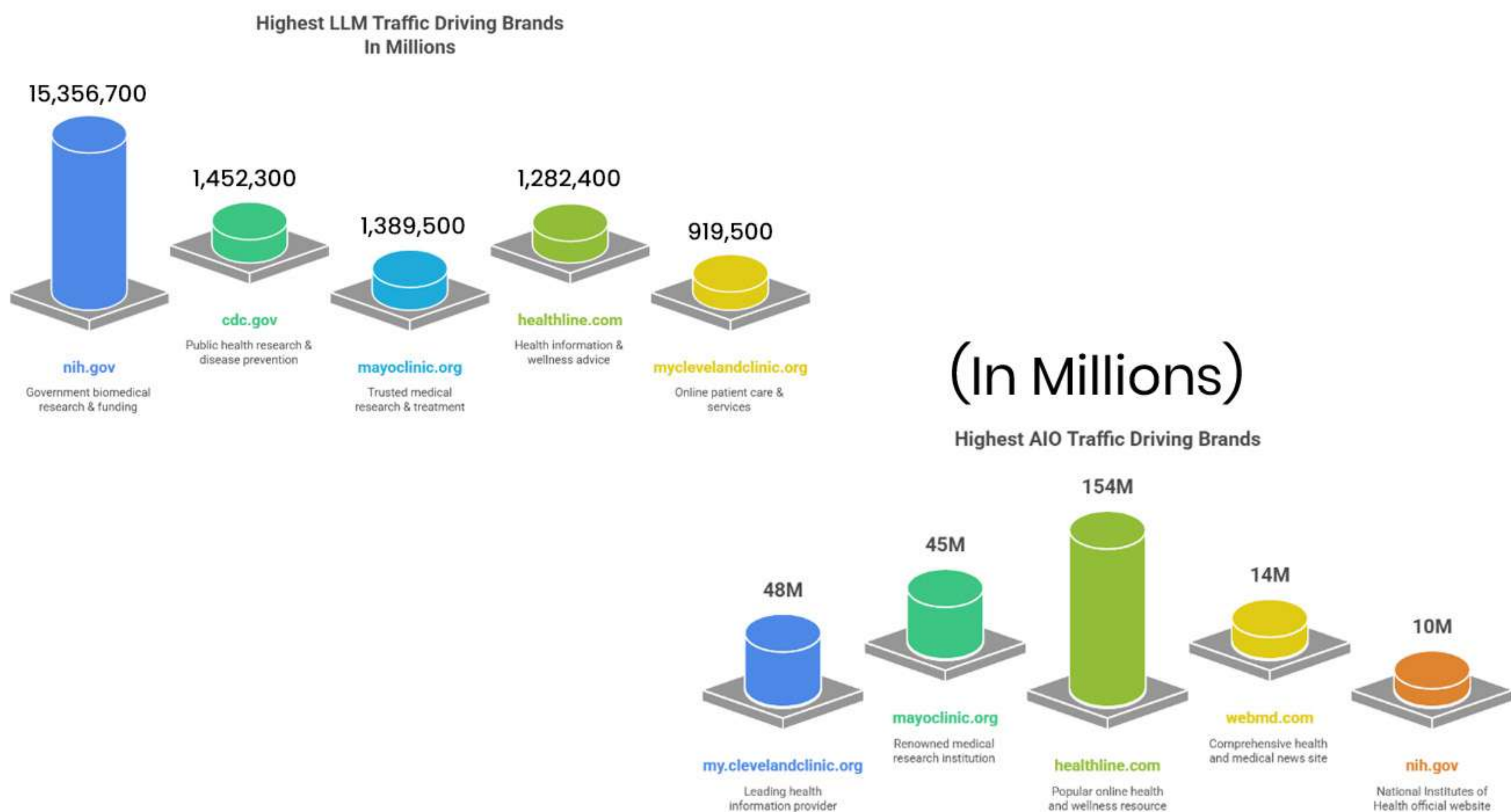
Health

The health sector is one of the most sensitive and high-stakes categories, where accuracy, trust, and authority are critical in shaping user decisions. In this analysis among leading health brands, we see that platforms like Cleveland Clinic and Mayo Clinic capture massive volumes through AIO traffic, while even the strongest LLM performer, nih.gov, falls far behind in scale.

Below is a detailed analysis of traffic among the major players in the health sector.

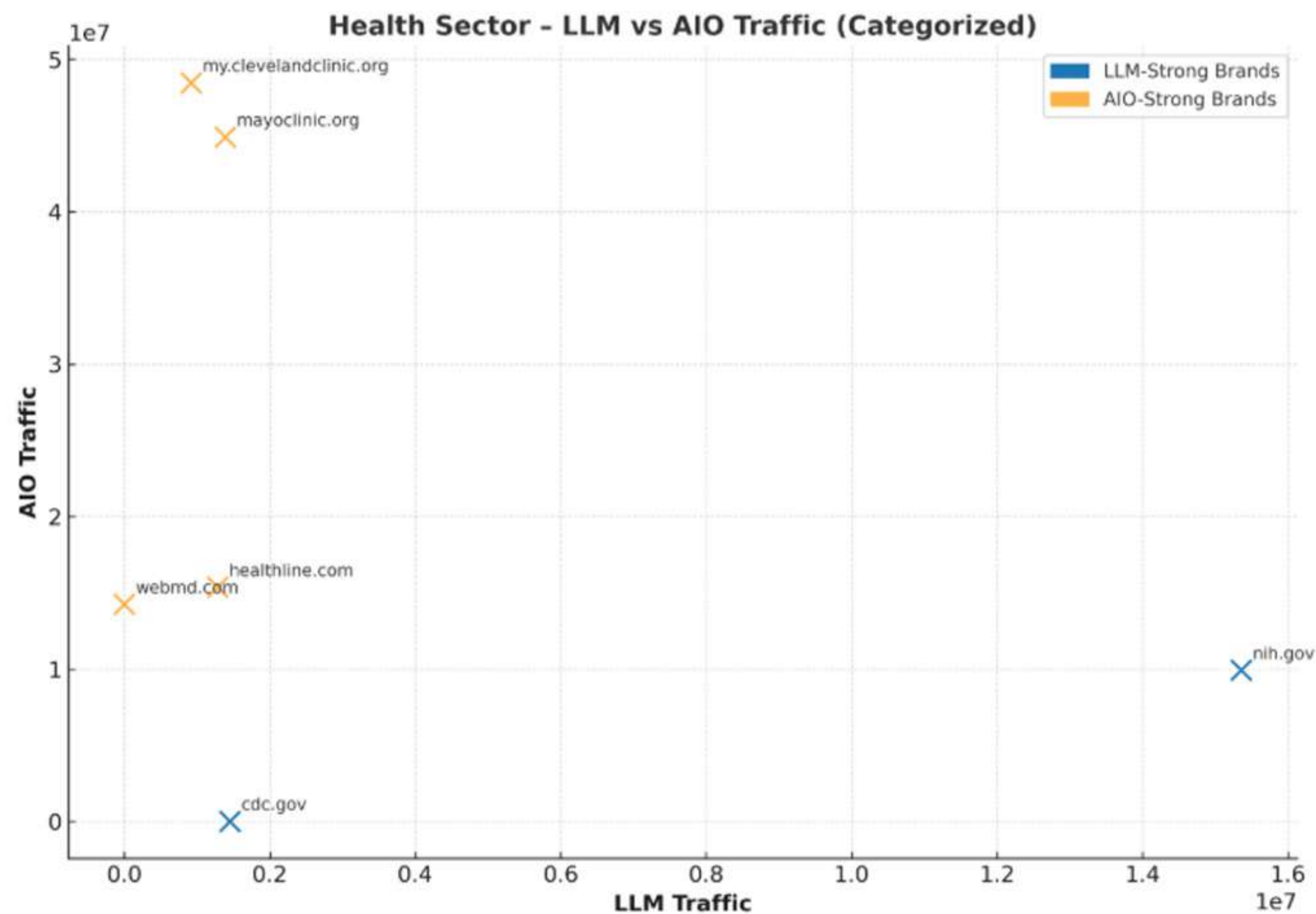


Disparity in Brand Visibility Across LLM and AIO Channels



Key Insight:

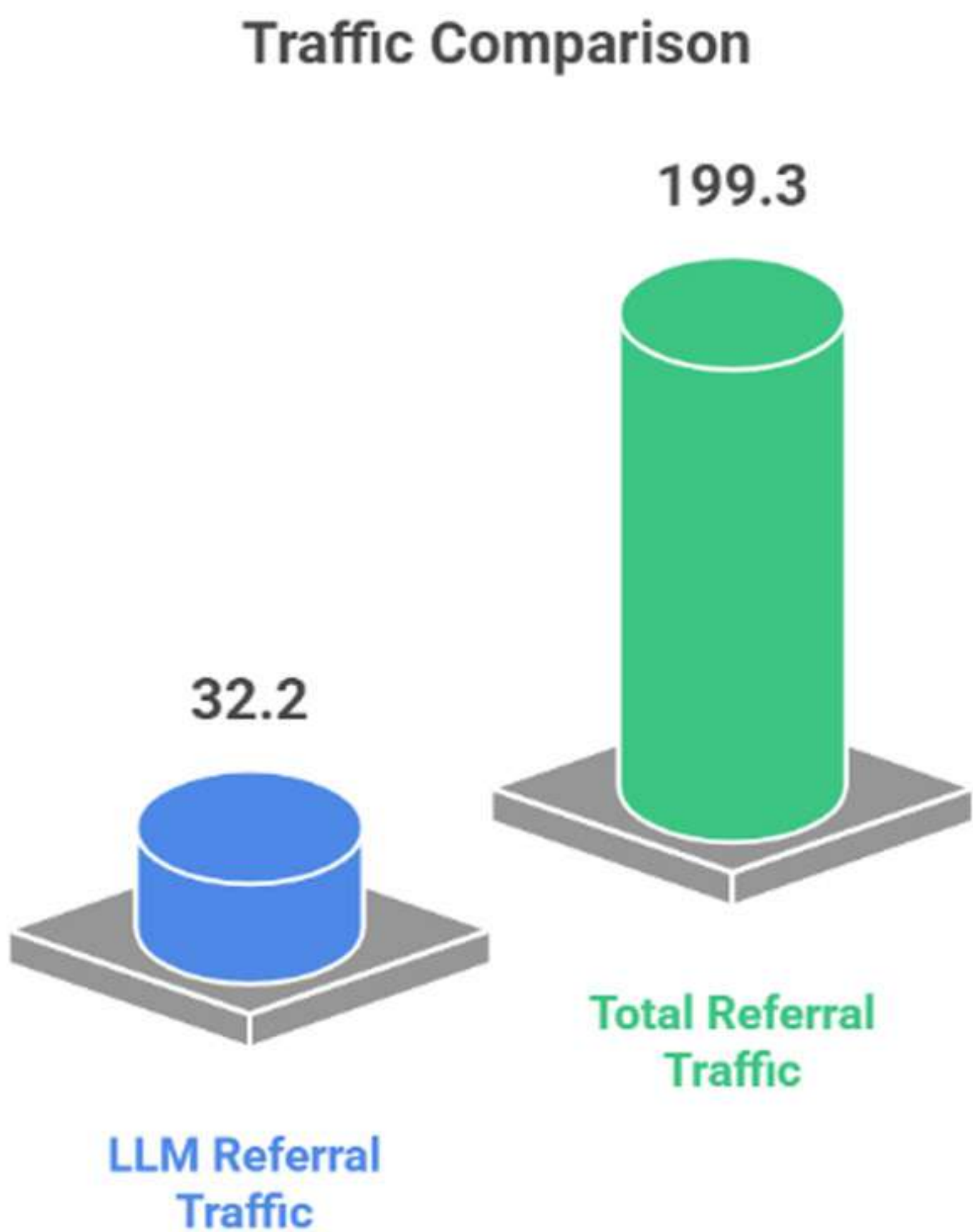
The health sector shows a sharp contrast between LLM-driven and AIO-driven visibility. Brands like Cleveland Clinic and Mayo Clinic capture massive volumes through AIO traffic, reaching tens of millions, while even the strongest LLM performer, nih.gov, falls far behind in scale. This imbalance highlights that AIO is currently the primary driver of visibility, but it also signals a strategic gap. **Brands** must invest in optimizing for LLM referrals to diversify discovery sources and avoid overreliance on AIO visibility.



- » **nih.gov** dominates LLM visibility with the highest traffic but lags considerably in AIO performance compared to its institutional peers.
- » **my.clevelandclinic.org** and **mayoclinic.org** flip this trend, showing moderate LLM traffic but leading AIO traffic by a wide margin.
- » **healthline.com** and **webmd.com** thrive in AIO visibility but are relatively minor players in LLM citations.
- » The scatter clearly highlights non-overlap of leaders: dominance in LLM does not correlate with dominance in AIO.
- » This divergence underscores the need for dual-channel strategies, brands cannot rely on strength in one channel to guarantee performance in the other

LLM Referral Traffic vs Total Referral Traffic

(In millions)

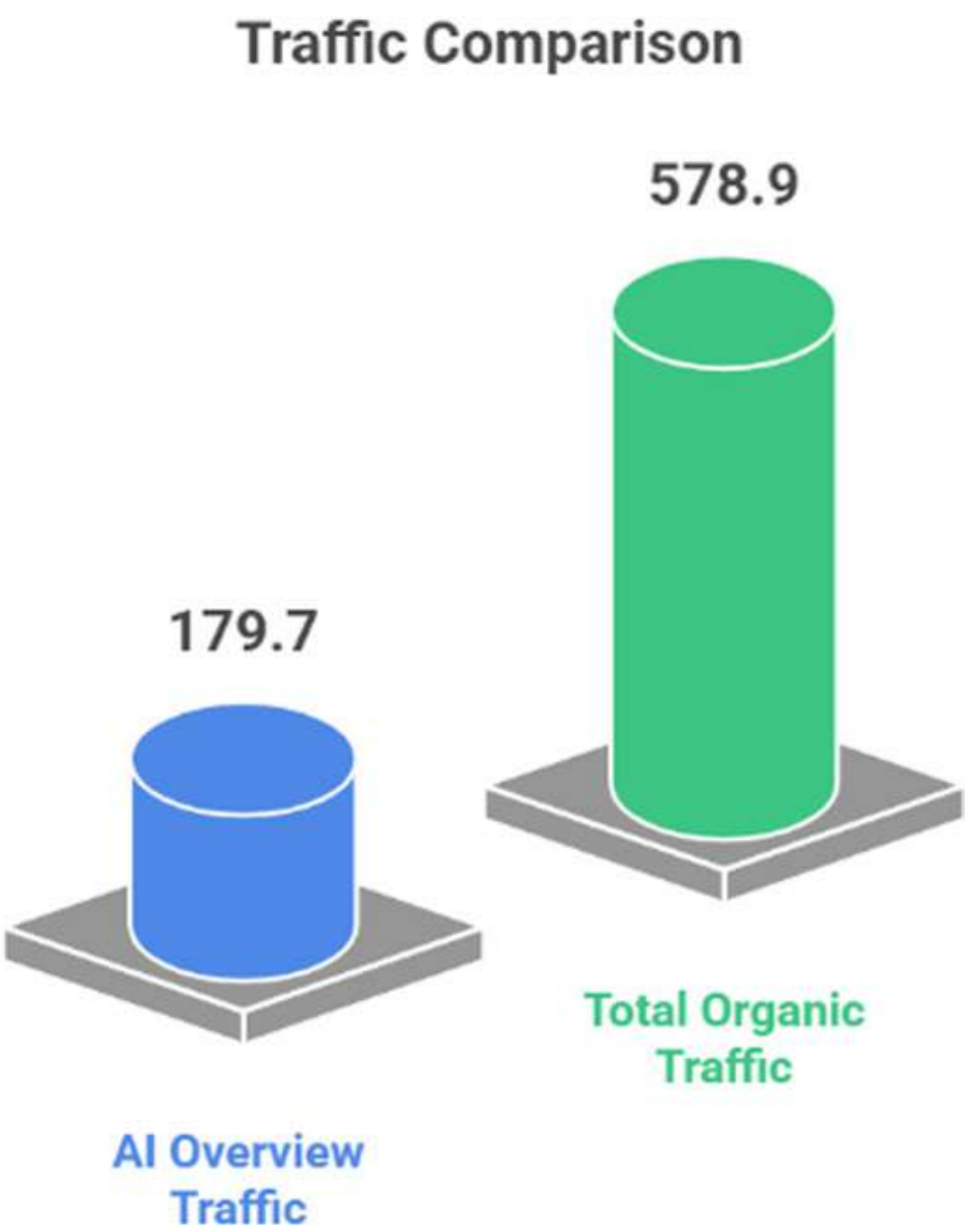


Key Insight:

In the health sector, LLM referral traffic (32.2M) accounts for just 16% of the total referral traffic (199.3M). While the absolute volume is notable, it underscores how traditional referral sources still dominate discovery. For health brands, this gap signals a dual opportunity: continue leveraging conventional referral channels while strategically expanding efforts to strengthen LLM visibility, ensuring early positioning as AI-driven discovery scales further.

AI Overview Traffic vs Total Organic Traffic

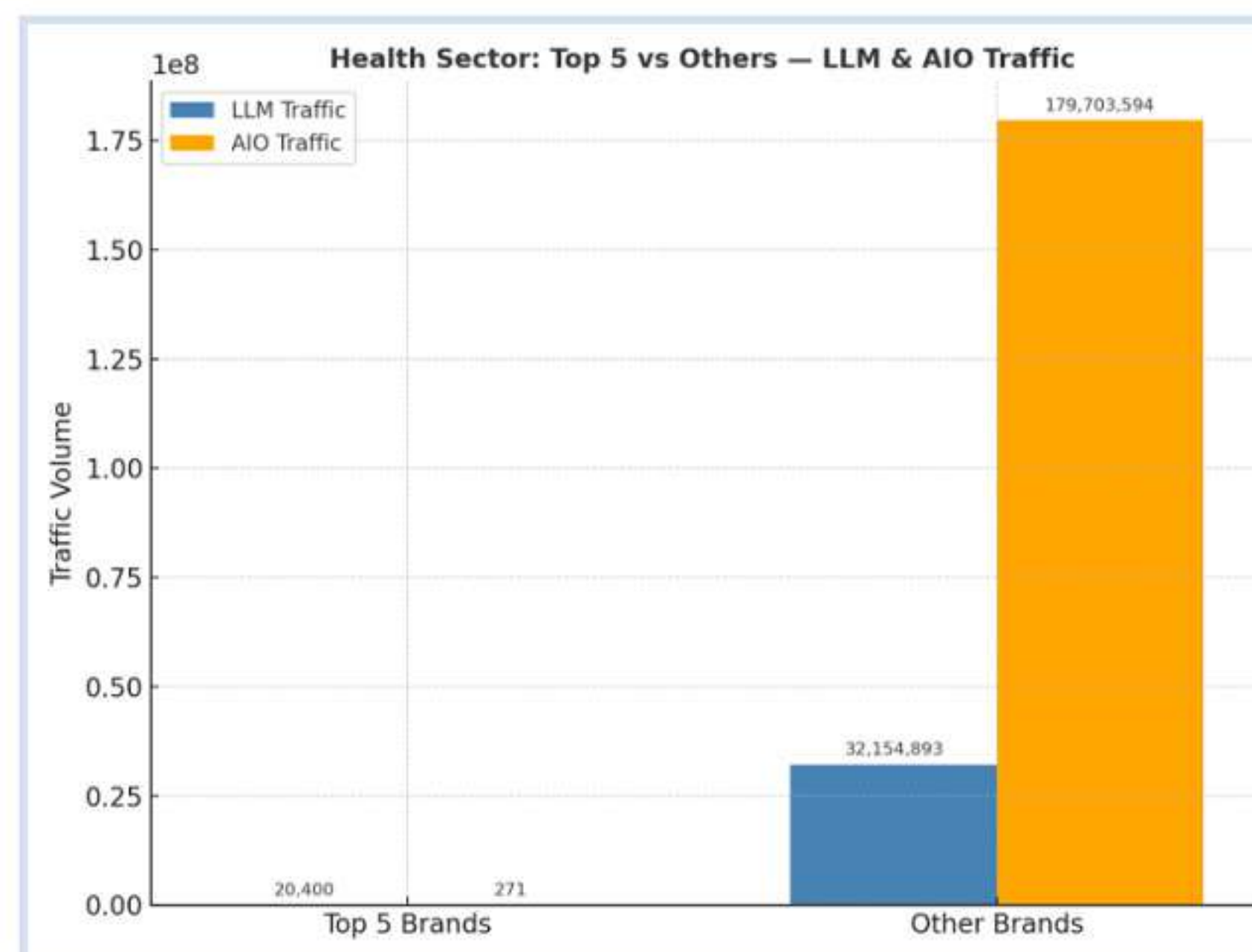
(In millions)



Key Insight:

AI Overview traffic in the health sector accounts for 179.7M visits, which is nearly 31% of the total organic traffic (578.9M). This proportion is far higher than in most other sectors analyzed, underscoring the outsized role of AI-powered answers in shaping health-related discovery. For health brands, this highlights an urgent imperative that optimizing for AI Overview visibility is central to capturing a better audience reach.

Market Share Analysis: LLM and AIO Traffic Distribution Among Top 5 and Other Brands



Key Insight:

In the health sector, the Top 5 brands in LLM traffic collectively generate just 20,400 visits, compared to 32,154,893 visits from all other brands, meaning virtually all LLM traffic (100%) is captured by smaller players, with the Top 5 having negligible presence.

In contrast, AIO traffic tells a completely different story: the Top 5 brands account for only 271 visits, while all other brands dominate with 179,703,594 visits. This reflects an even more extreme imbalance, where nearly 100% of AIO traffic belongs to the Other Brands.

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REAL ESTATE

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Real estate

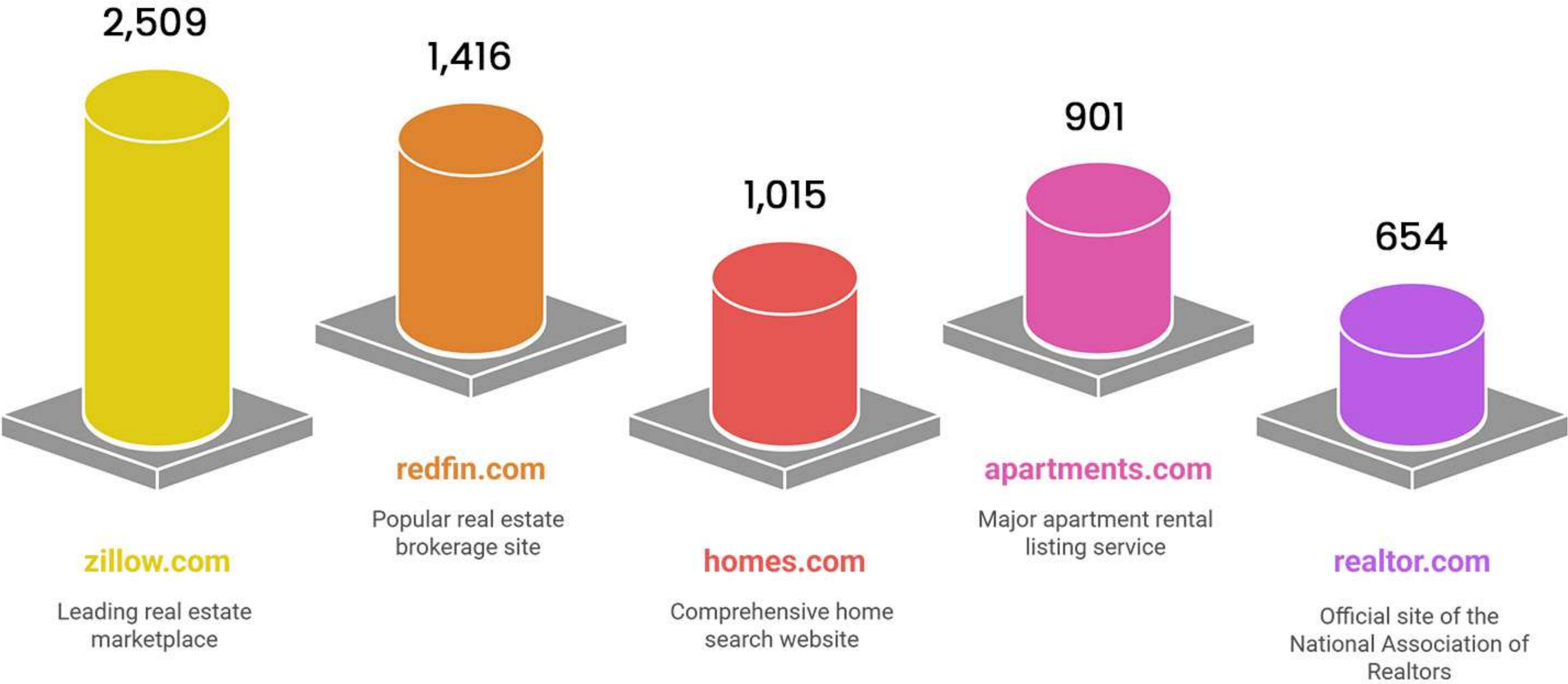
The real estate sector relies heavily on digital discovery, as consumers increasingly turn to online platforms to research properties, compare options, and make informed decisions. In this analysis among leading real estate brands, we see that homes.com shows high LLM traffic but no visibility in AIO traffic, while trulia.com appears in AIO traffic but not in LLM traffic. This reflects the fragmented nature of traffic acquisition in the real estate industry.

Below is a detailed analysis of traffic among the major players in the real estate sector.

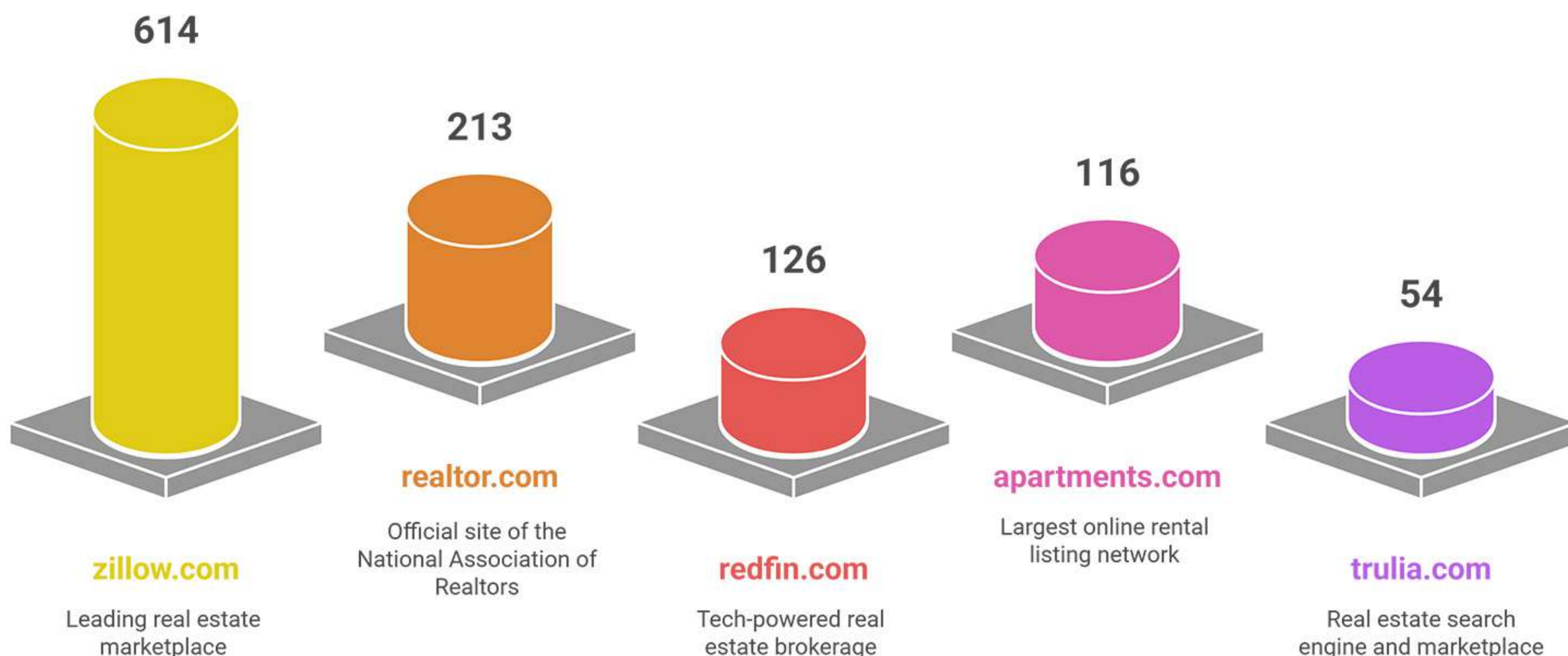


The Gap Between LLM and AIO Visibility

LLM Traffic Driving Brands
(in thousands)



Highest AIO Traffic Driving Brands (in thousands)

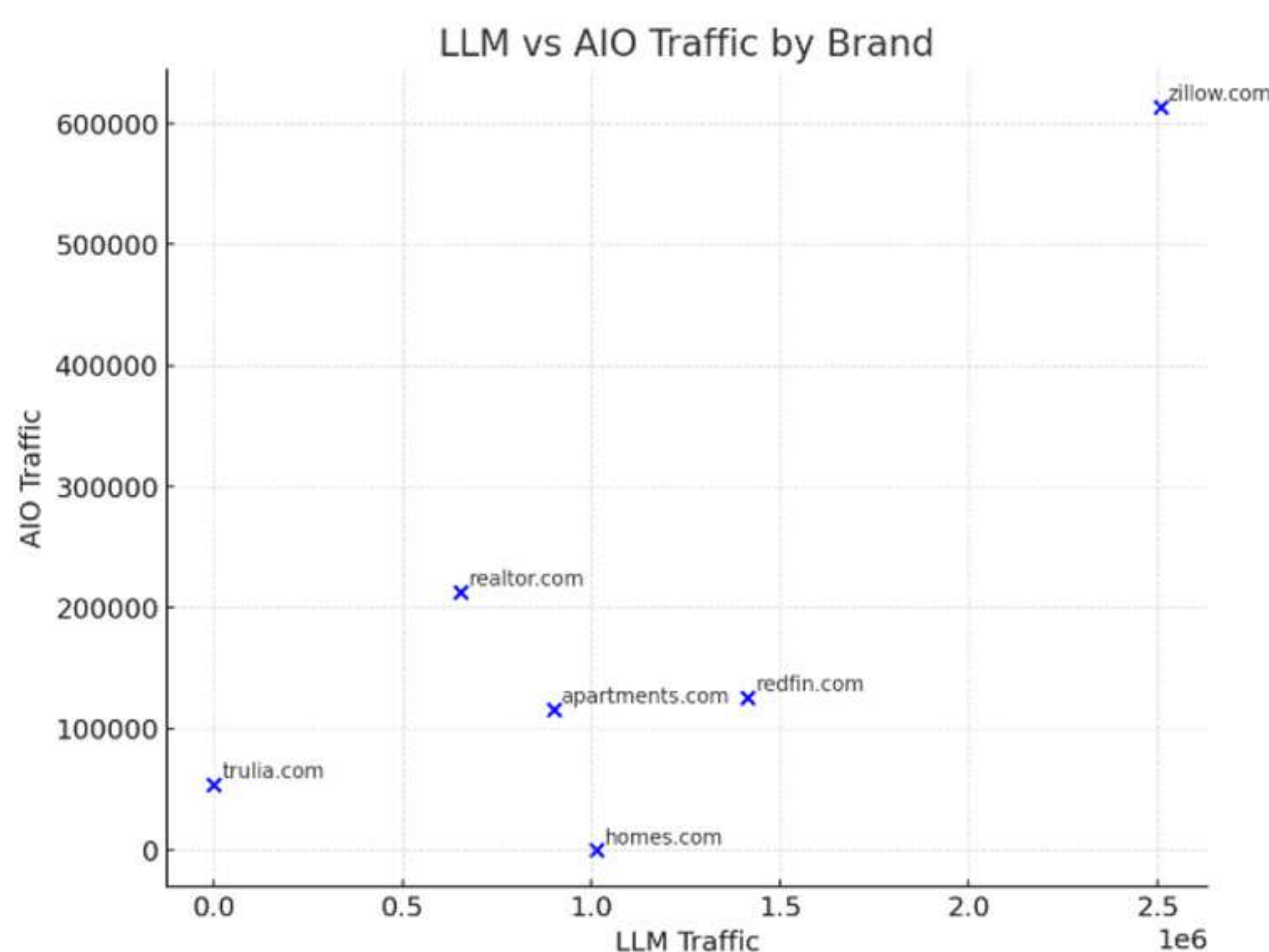


Key Insight:

Top-ranking real estate brands in LLM-driven traffic do not necessarily translate to high AIO traffic performance. This indicates that high performance in one channel does not guarantee similar success in the other, highlighting the need for differentiated strategies for each traffic source.

LLM vs AIO Traffic by Brand

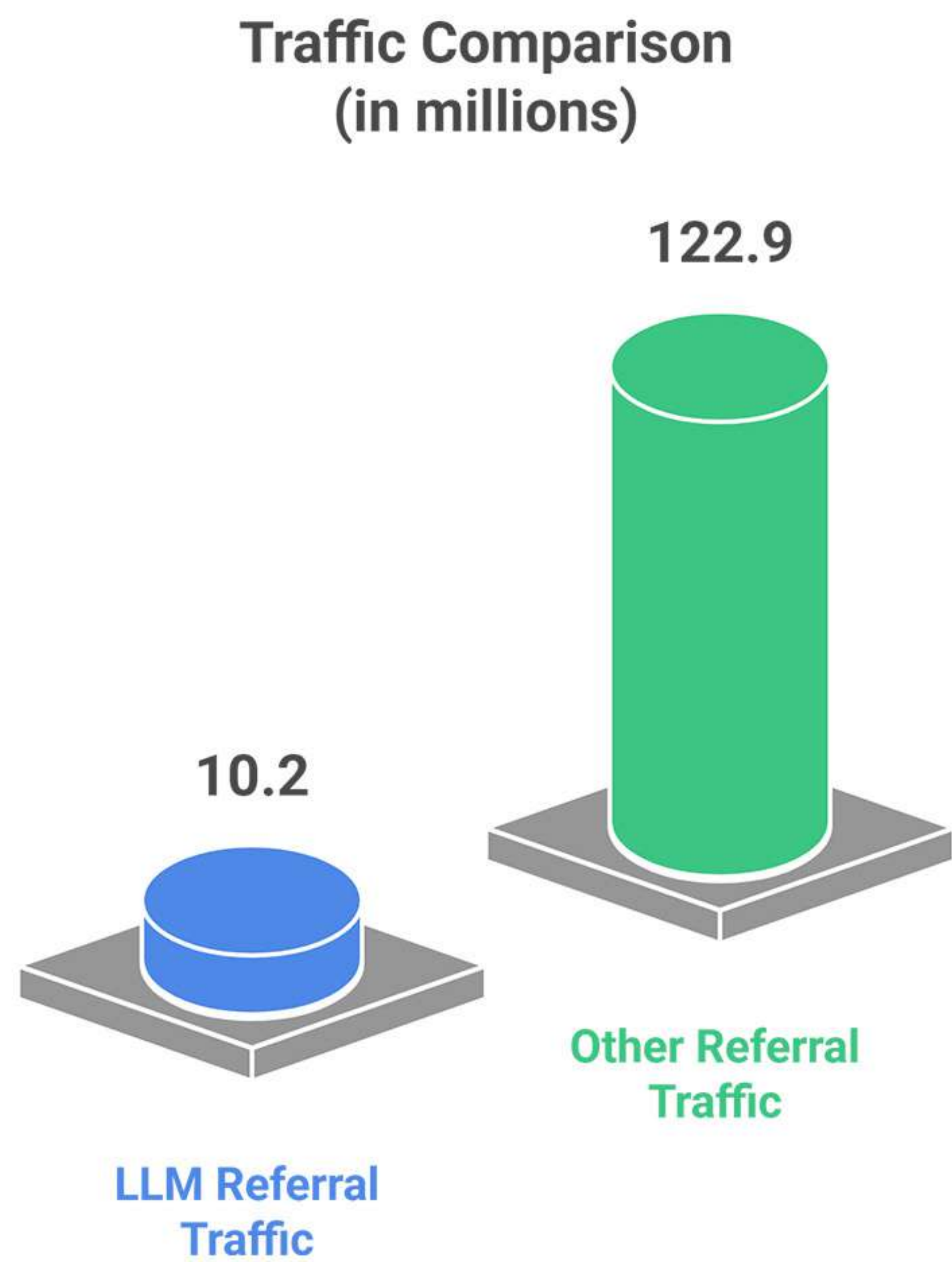
- » High LLM traffic is seen for homes.com, but it does not appear in AIO traffic.
- » AIO traffic is recorded for trulia.com, but there is no sign of LLM traffic.
- » zillow.com performs strongly in both channels, while other brands have varying visibility



Key Insight:

Performance in LLM traffic does not guarantee success in AIO traffic. Brands like homes.com highlight a gap in AIO visibility, while trulia.com demonstrates the opposite. This reinforces the need for channel-specific strategies to fully leverage both LLM and AIO opportunities.

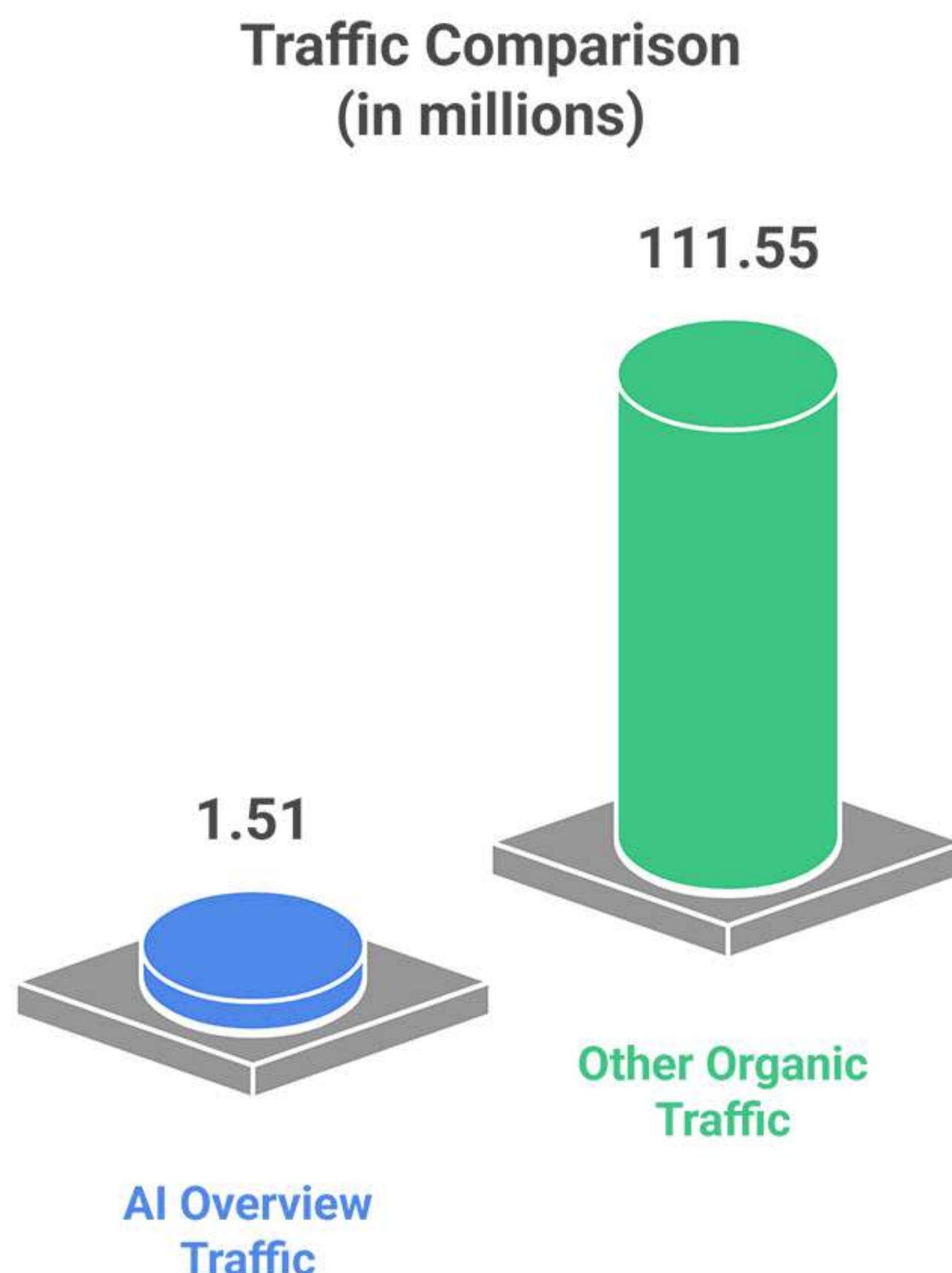
LLM Referral Traffic vs Total Referral Traffic



Key Insight:

LLM referral traffic accounts for approximately 8.3% of the total referral traffic in the real estate sector. While this indicates that LLM-driven channels are contributing meaningfully, the relatively small share highlights a significant opportunity for growth through strategic optimization of LLM integrations and visibility.

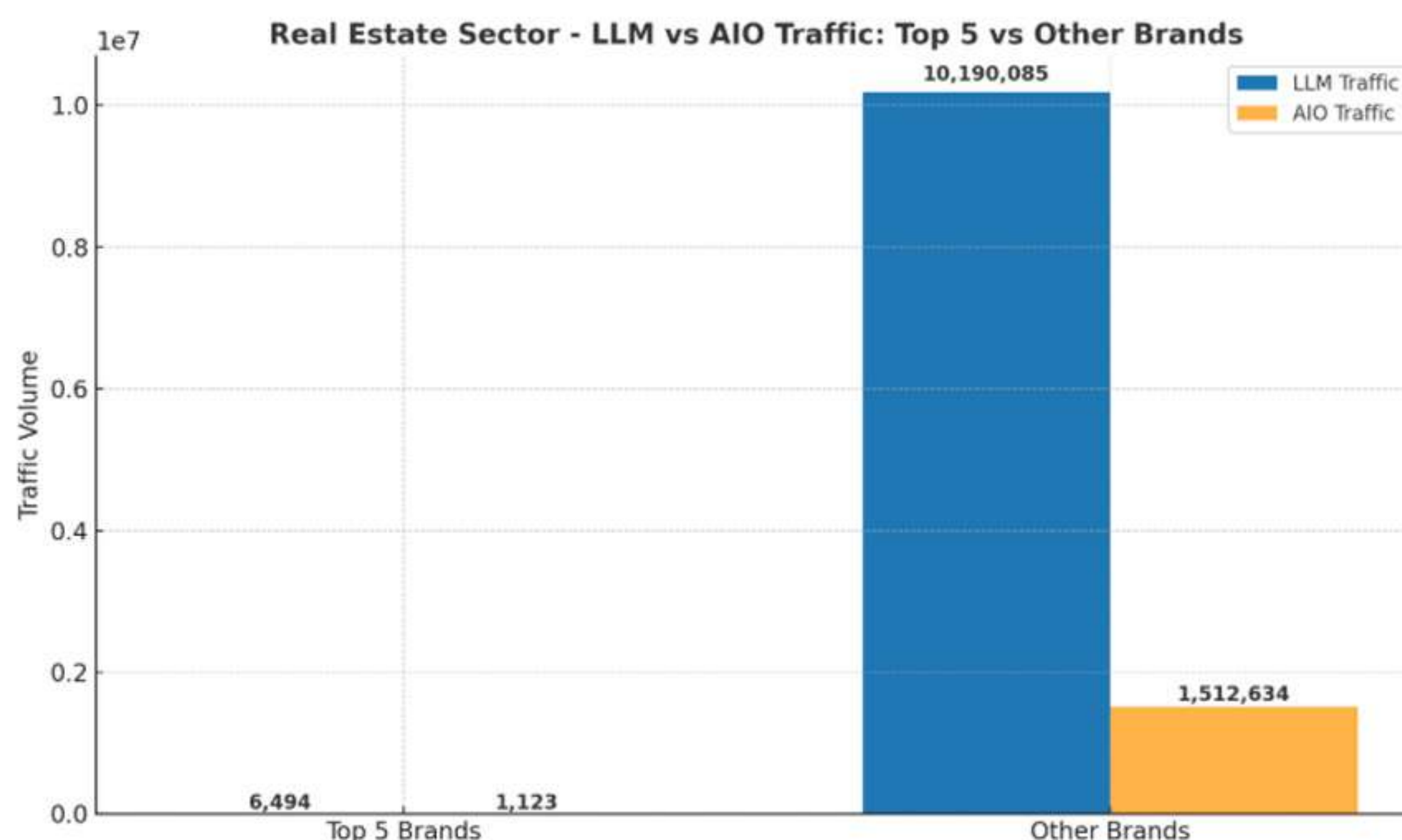
AI Overview Traffic vs Total Organic Traffic



Key Insight:

AI Overview traffic contributes approximately 1.4% of the total organic traffic in the real estate sector, underscoring its nascent but growing role in audience acquisition. This low share indicates that most organic visibility is still driven by traditional search results, leaving a substantial untapped opportunity. Brands that proactively optimize their content for AI-driven overviews can position themselves early to capture incremental traffic as AI integrations in search engines continue to expand.

Market Share Analysis: LLM and AIO Traffic Distribution Among Top 5 and Other Brands



- » Negligible LLM Visibility for Top Brands: The top 5 real estate platforms contribute just 6,494 visits, a fraction compared to 10,190,085 visits generated by other brands. This shows that LLM-driven traffic in this sector is almost entirely absent for leading players.
- » AIO Traffic Also Minimal for Top Players: Even in AI Overviews, top brands collectively draw only 1,123 visits, while other brands account for 1,512,634 visits, again highlighting their weak positioning in AI-driven channels.
- » Urgent Need for Optimization: With top brands underperforming and “other” brands holding the majority share, there’s a clear need for leading real estate platforms to improve AI-based visibility strategies.

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MARKETPLACE



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Marketplace

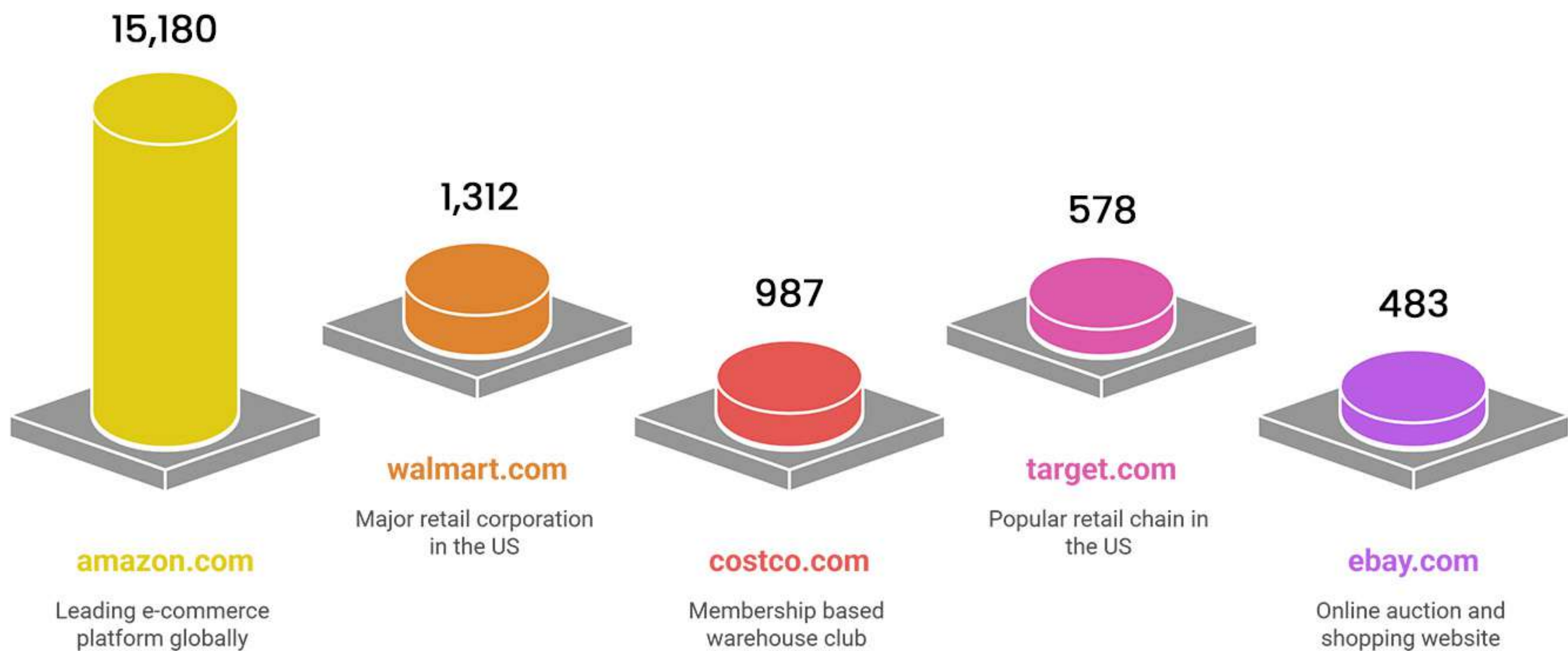
The marketplace sector is at the core of digital commerce, where platforms compete for visibility, user trust, and transaction volume. In this analysis we see that global players like Etsy, eBay, Walmart, Temu, and Target rely heavily on LLM traffic. In contrast, Indian platforms such as Amazon.in, Flipkart, and IndiaMart dominate in AIO traffic.

Below is a detailed analysis of traffic among the major players in the marketplace sector.



Comparing LLM and AIO Traffic Across Marketplace Brands



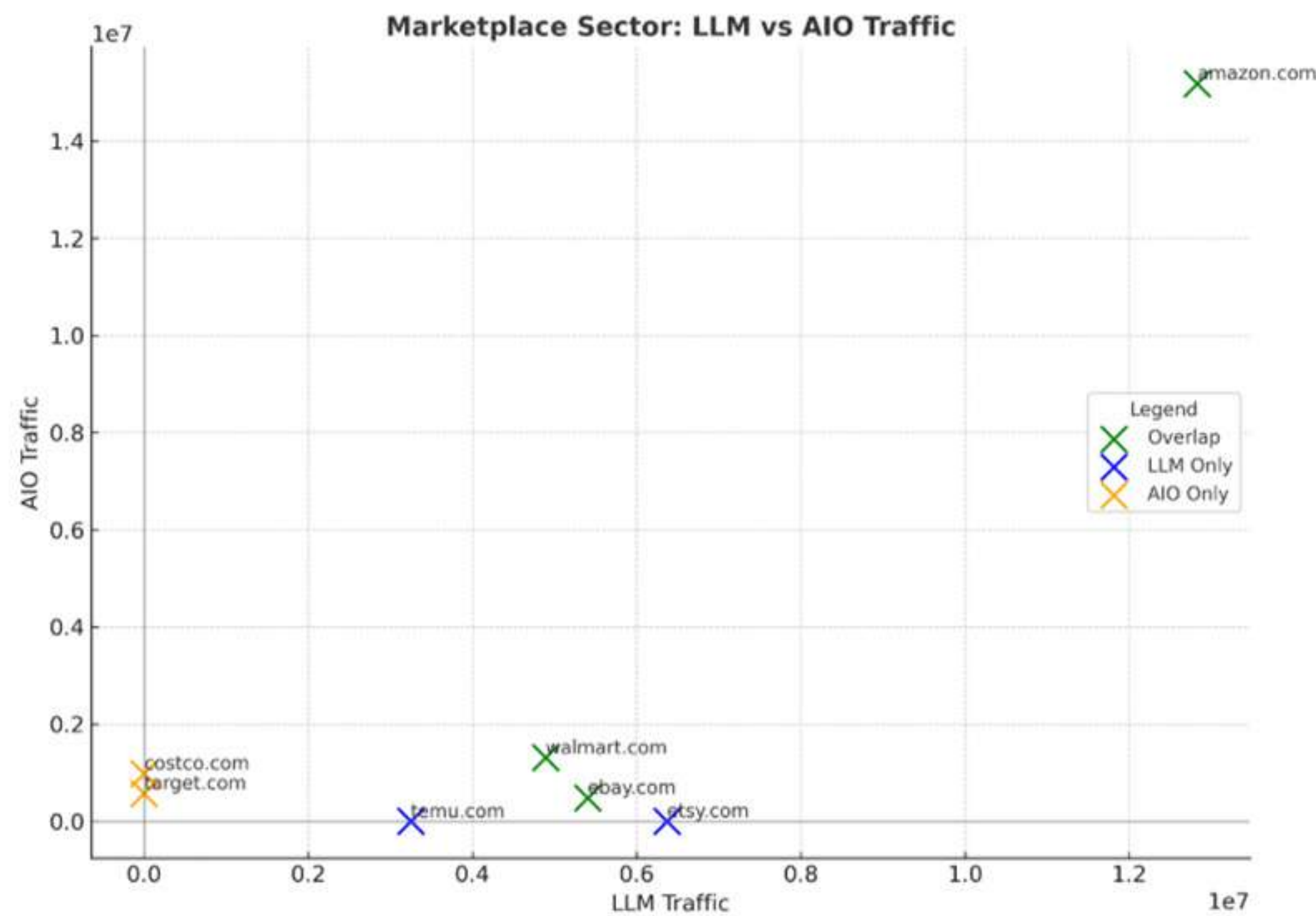
AIO Traffic to Marketplace Sectors
(in thousands)

Key Insight:

In the marketplace sector, Amazon leads both LLM and AIO traffic, highlighting its dominance across both channels. However, beyond Amazon, the landscape diverges sharply. Etsy, Temu, and eBay rank strongly in LLM referrals, while they lose visibility in AIO traffic. Conversely, Costco and Target appear in AIO leaders but are absent from LLM-driven rankings.

This contrast underscores that LLM and AIO prioritize different brand strengths, LLMs tend to highlight a broader set of e-commerce players, while AIO surfaces a narrower pool of dominant retail platforms. Brands outside the overlapping group must optimize distinctly for each channel to avoid being sidelined.

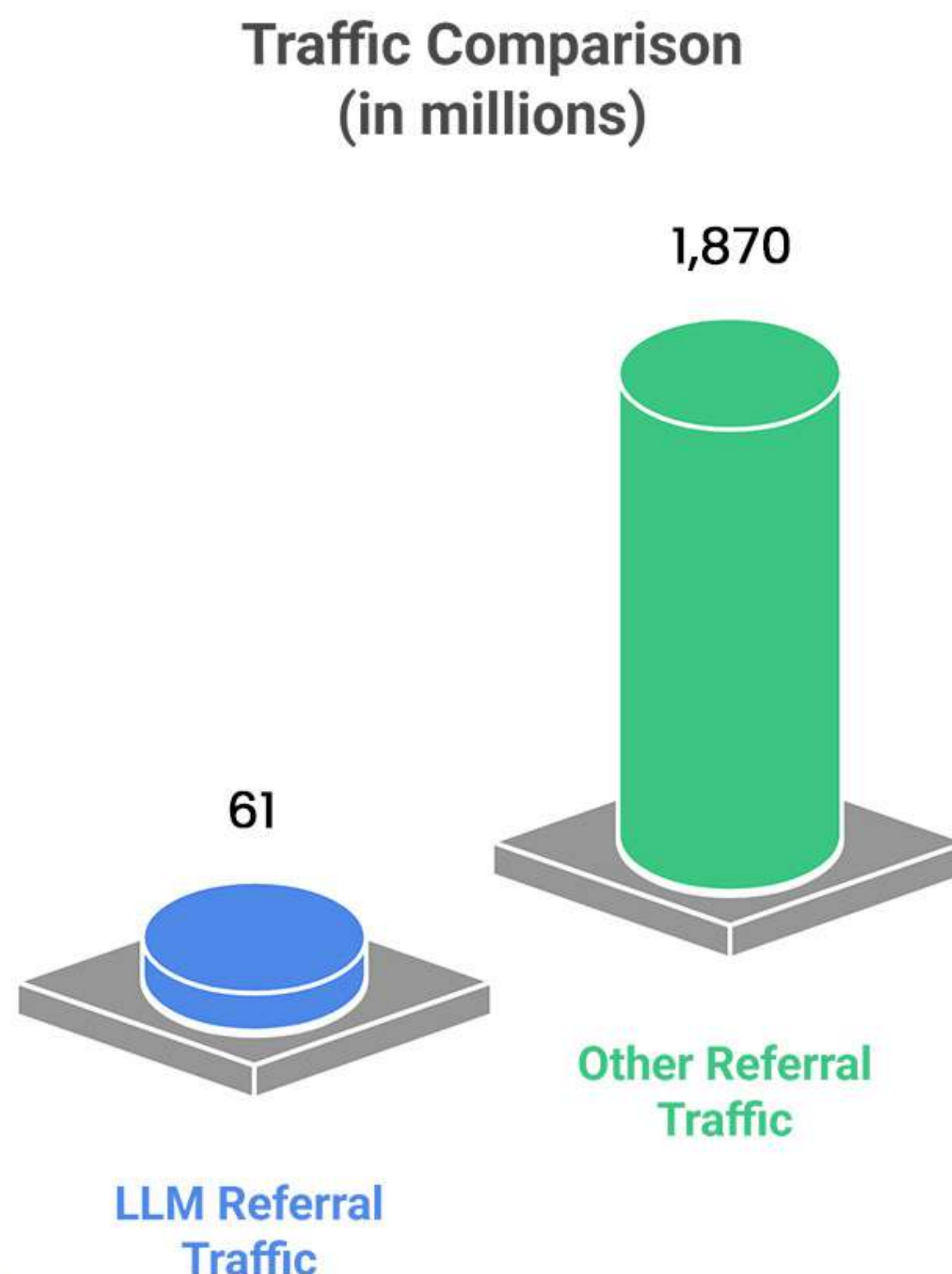
LLM and AIO Traffic



- » Amazon dominates both LLM and AIO traffic, making it the only brand with clear leadership across both channels. This reflects its unmatched authority and integration in consumer search behavior.
- » Etsy, eBay, Walmart, and Temu lead strongly in LLM traffic but do not carry the same weight in AIO, showing a dependency on generative search visibility rather than AI Overview citations.
- » Walmart and eBay appear in both datasets but with heavy skew toward LLM referrals, signaling that while they have some AIO presence, their strength is still tied more to LLM-driven visibility.
- » Costco and Target are AIO-focused players, absent from LLM traffic but performing strongly in AI Overviews, pointing to their optimization around product and retailer-driven queries.

The marketplace sector shows a clear bifurcation: Amazon is the outlier excelling in both, while other brands skew heavily to one channel. This highlights the importance of dual optimization strategies for brands aspiring to replicate Amazon's balanced dominance.

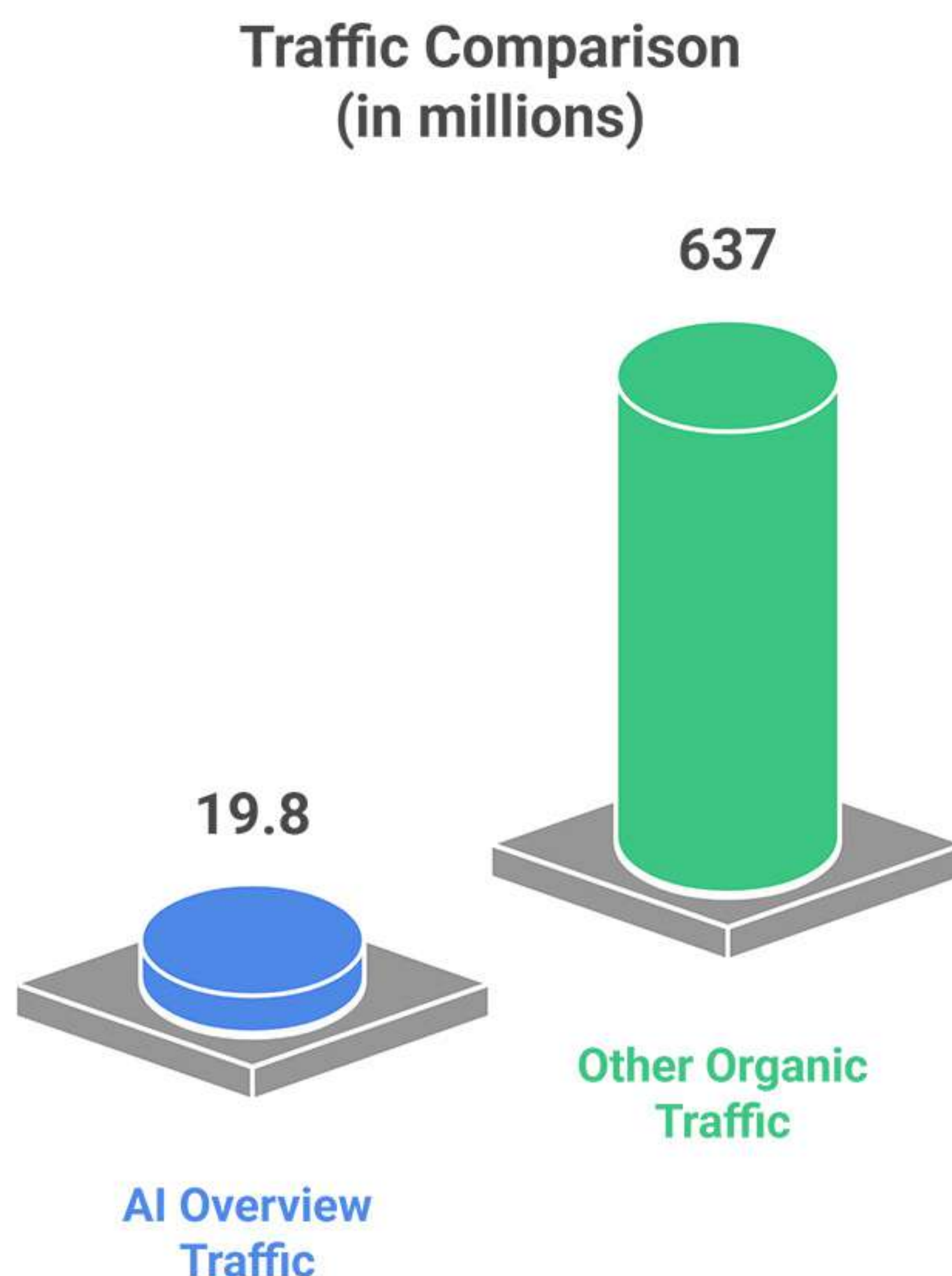
LLM Referral Traffic vs Total Referral Traffic



Key Insight:

LLM referrals account for just over 61 million visits compared to nearly 1.87 billion from total referrals, highlighting that traditional referral channels still dominate marketplace traffic. However, the scale of LLM-driven visits is significant in its own right, signaling that AI-driven traffic is already influencing consumer journeys. Brands that build visibility in LLMs today will be better positioned for long-term competitive advantage as AI adoption accelerates.

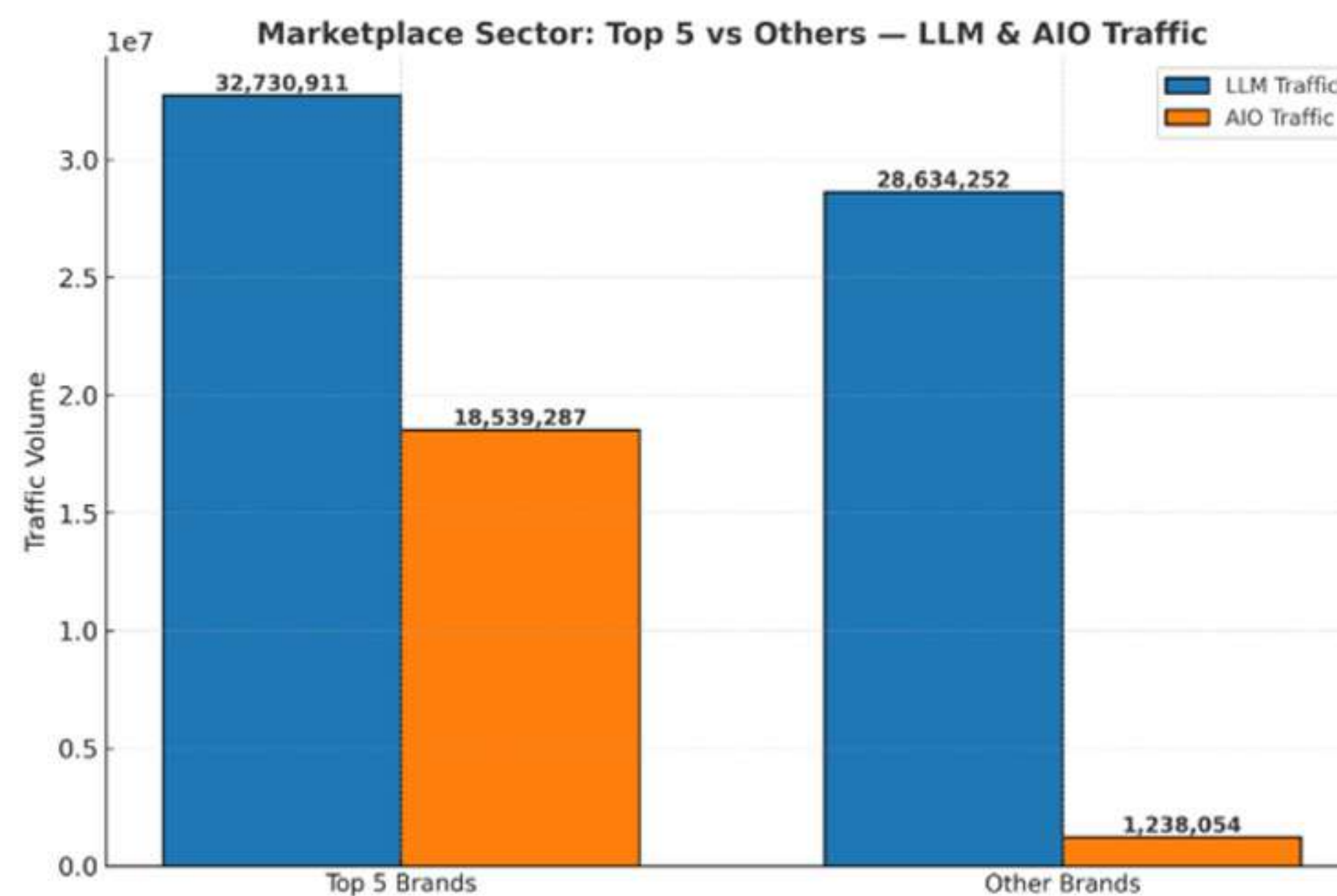
AI Overview Traffic vs Total Organic Traffic



Key Insight:

AI Overview traffic contributes nearly 19.8 million visits compared to over 637 million from total organic traffic, underscoring that traditional organic search still overwhelmingly drives marketplace visibility. Yet, the presence of close to 20 million AI Overview visits shows that this emerging channel is already playing a meaningful role in shaping consumer discovery. For marketplace brands, optimizing content to surface in AI Overviews presents a critical growth opportunity as AI-powered search continues to scale.

Market Share Analysis: LLM and AIO Traffic Distribution Among Top 5 and Other Brands



Key Insight:

In the marketplace sector, the top 5 brands significantly outperform others in both LLM and AIO traffic, but the degree of dominance varies. For LLM traffic, the split is relatively balanced, with the top 5 capturing 32.7 million visits (53%) versus 28.6 million (47%) for other brands. However, in AIO traffic, the gap is extreme, the top 5 brands account for 18.5 million visits (94%), while other brands collectively generate just 1.2 million (6%). This contrast highlights that while LLMs provide broader opportunities for diverse brands, AIO visibility is highly concentrated, reinforcing the competitive advantage of leading players.

SOCIAL NETWORKS & ONLINE COMMUNITIES

Social Platforms

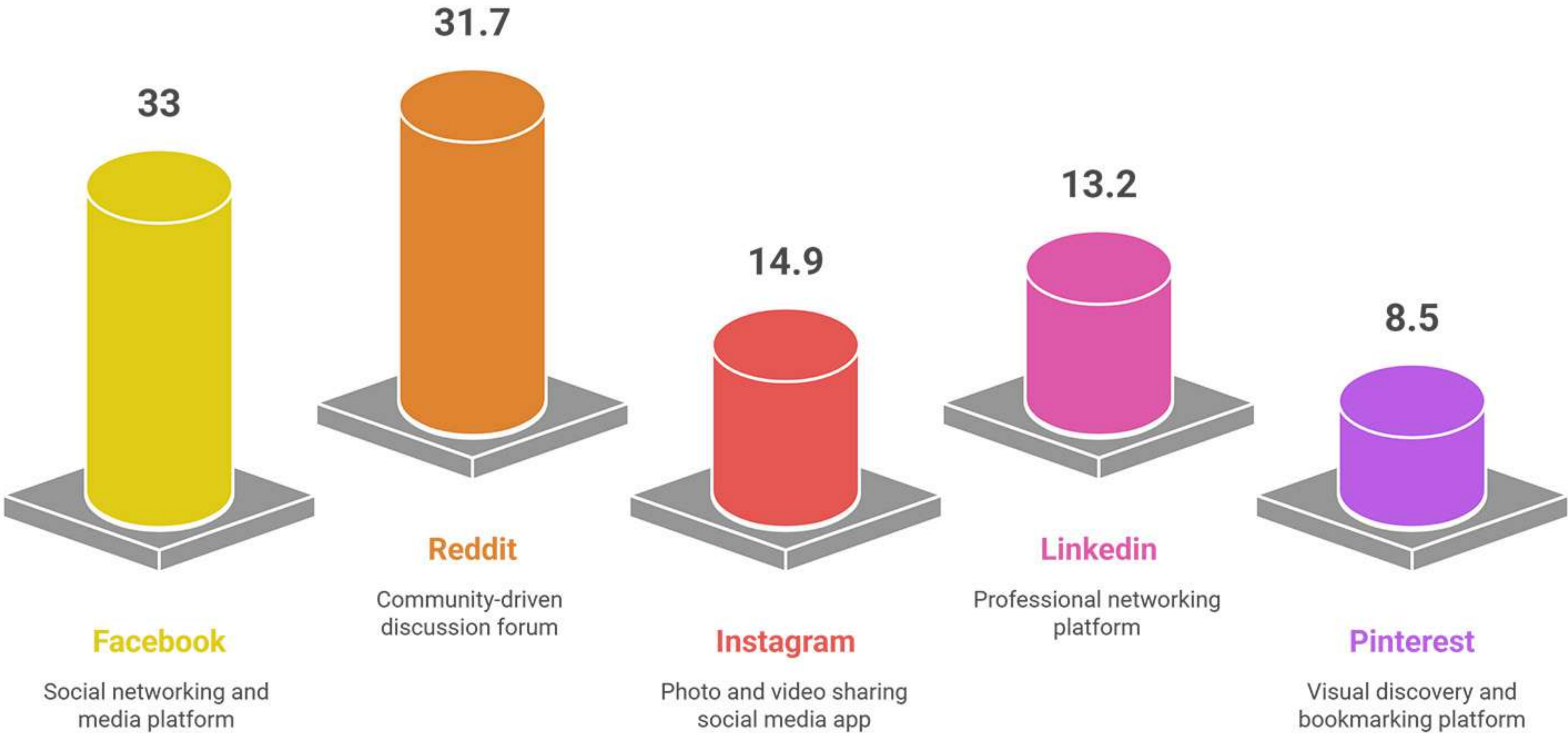
The social platforms sector is at the centre of digital engagement, where user discovery, community interaction, and content consumption converge. In this analysis among leading social platforms, LLM traffic is heavily skewed toward **Facebook** and **Reddit**, while AIO traffic leans disproportionately on Reddit, highlighting distinct platform strengths and usage patterns. This demonstrates how even within the same sector; dominance can vary widely depending on the channel.

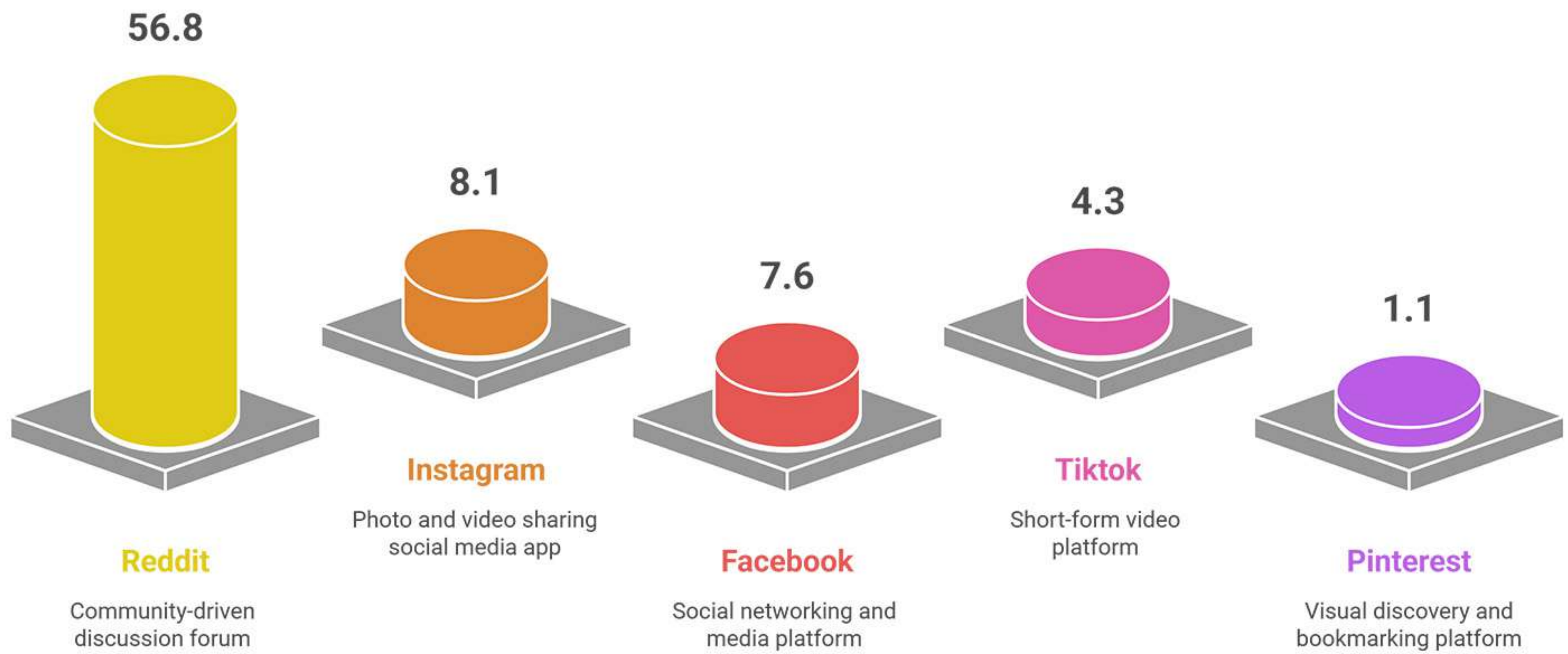
Below is a detailed analysis of traffic among the major players in the



The Divergence Between LLM Traffic Brands and AIO Traffic Brands

LLM Traffic to Social Platforms
(in millions)



AIO Traffic to Social Platforms
(in millions)

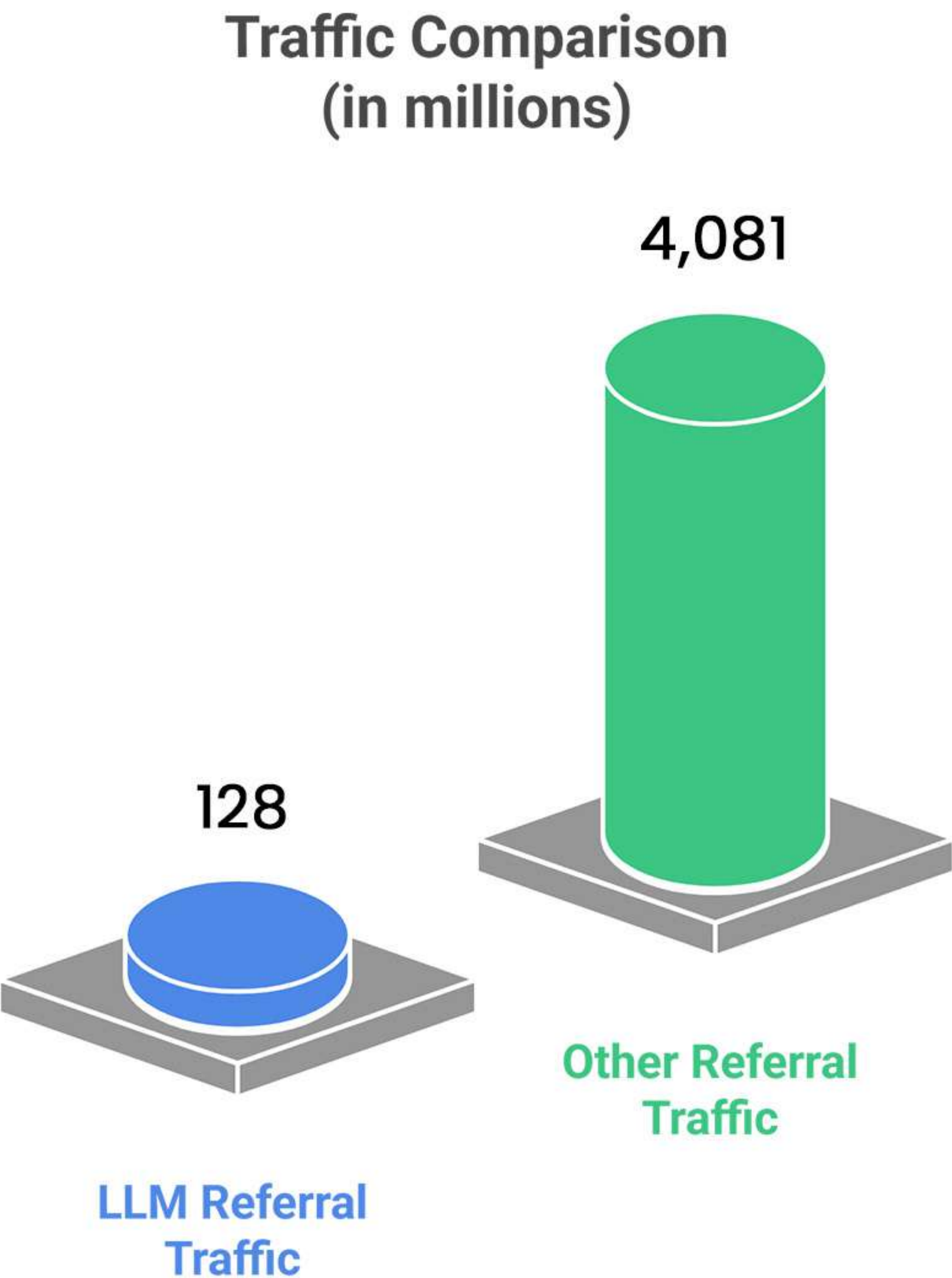
Key Insight:

Social platforms dominate AI citations, but newer communities like **Quora** and **Discord forums** are emerging as strong sources. While **Facebook (33M LLM traffic)** and **Reddit (31.7M)** lead in AI visibility, Q&A sites like **Quora** capture outsized traffic relative to their organic scale.

LLM traffic is heavily skewed toward Facebook and Reddit, while AI Overviews lean disproportionately on Reddit, highlighting different platform strengths.

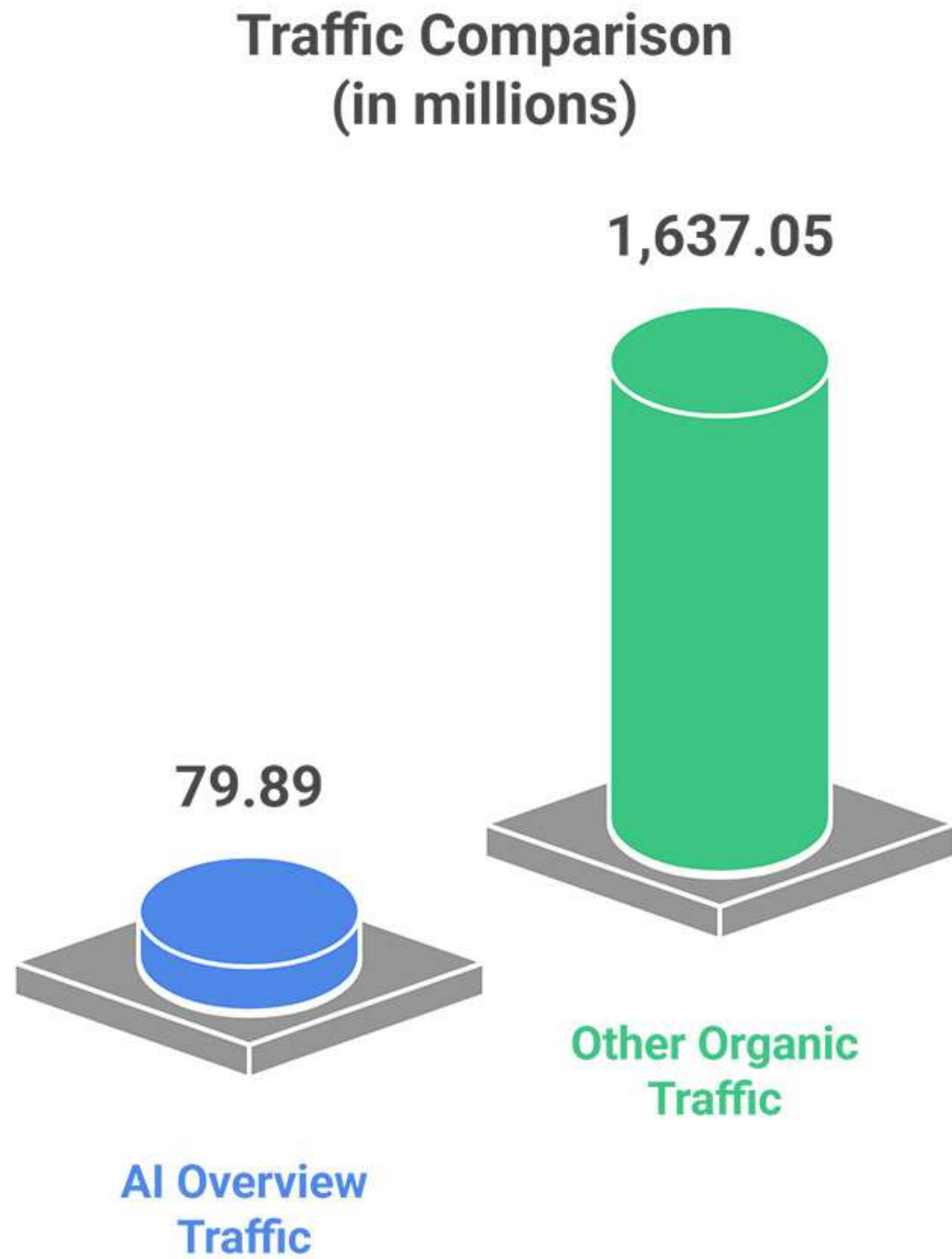
LLM Referral Traffic vs Total Referral Traffic

LLM referrals account for just 3% of the category's referral traffic, showing early traction but leaving significant headroom for growth.



AI Overview Traffic vs Total Organic Traffic

AI Overviews already drive 5% of organic traffic across social networks, underscoring their growing role in discovery.

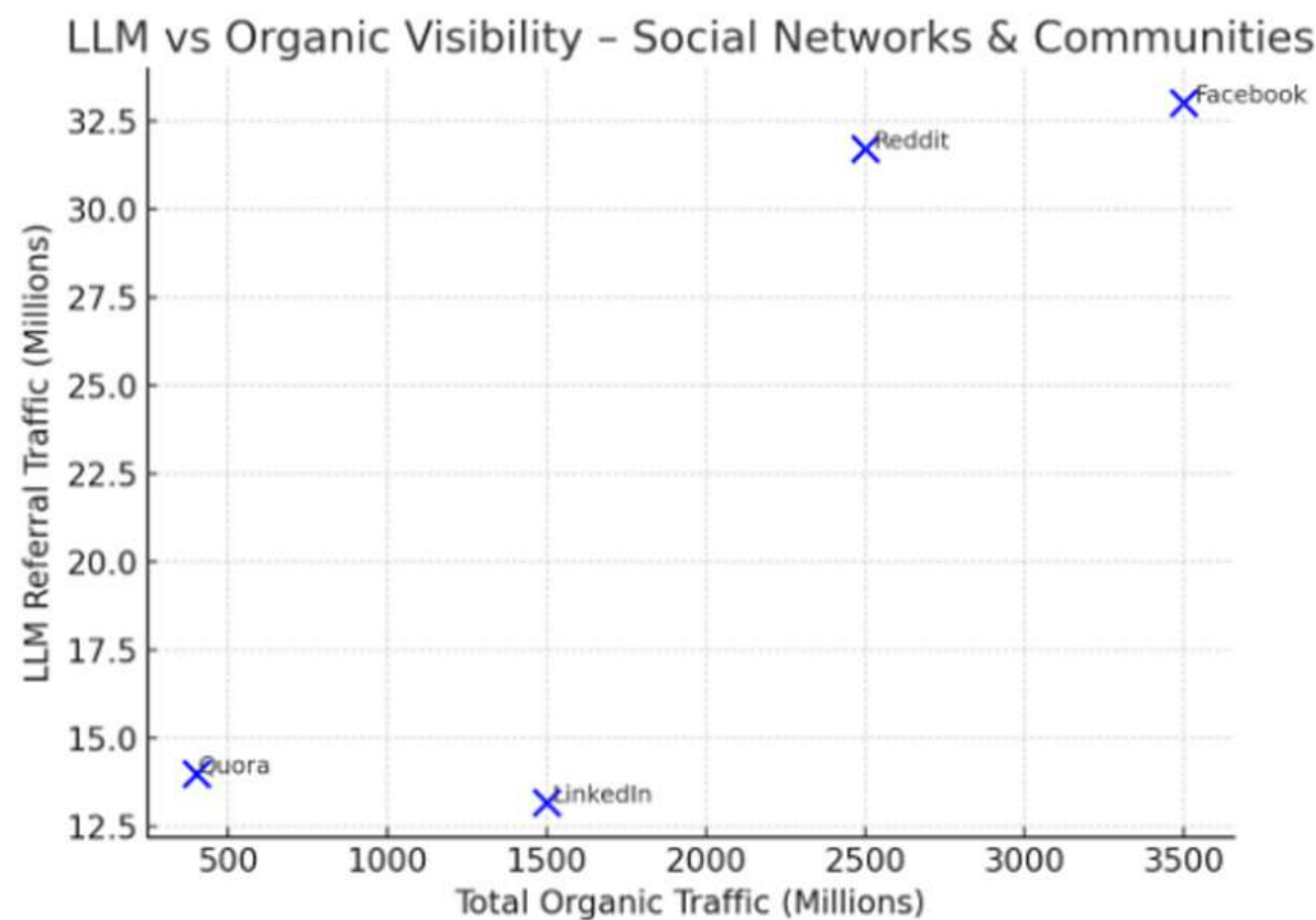


Insight:

AI Overviews are already shaping discovery, contributing 5% of all organic traffic in this category.

LLM vs Organic Visibility

High organic traffic doesn't always translate into AI citations. While Facebook and Reddit win across both, Quora punches above its weight thanks to Q&A-driven content.



» High Organic & High LLM

Facebook, Reddit: Strong in both search and AI-driven discovery.

» Low Organic & High LLM Share

Quora: Smaller organic base but outsized AI visibility.

» High Organic & Low LLM

LinkedIn: Heavy organic footprint but underrepresented in LLMs.

Takeaway:

Knowledge-sharing communities like Quora are overperforming in AI citations, while traditional networks under-index relative to their size.

AI Overview vs Organic Visibility

» High Organic & High AIO:

Facebook, Reddit: Frequently cited in AI Overviews.

» Low Organic & High AIO Share:

Quora: Over-indexed in AIO, leveraging long-tail Q&A content.

» High Organic & Low AIO:

LinkedIn: Strong SEO, but AI Overviews under-use its corporate-style content.

ADLIFT

BANKING



AN ADLIFT RESEARCH

Banking, Credit & Lending

The banking sector is undergoing a rapid digital transformation, where user discovery has evolved from traditional search engines to AI search era. In this analysis among leading banking brands, AI visibility is led by Wise alongside other established traditional banks. Wise drives the most LLM referrals at 1.3M, while other players show varying strengths across AIO and LLM traffic. This reflects the dual nature of competition, where disruptive fin-techs and legacy institutions are both carving out digital prominence.

Below is a detailed analysis of traffic among the major players in the banking sector.

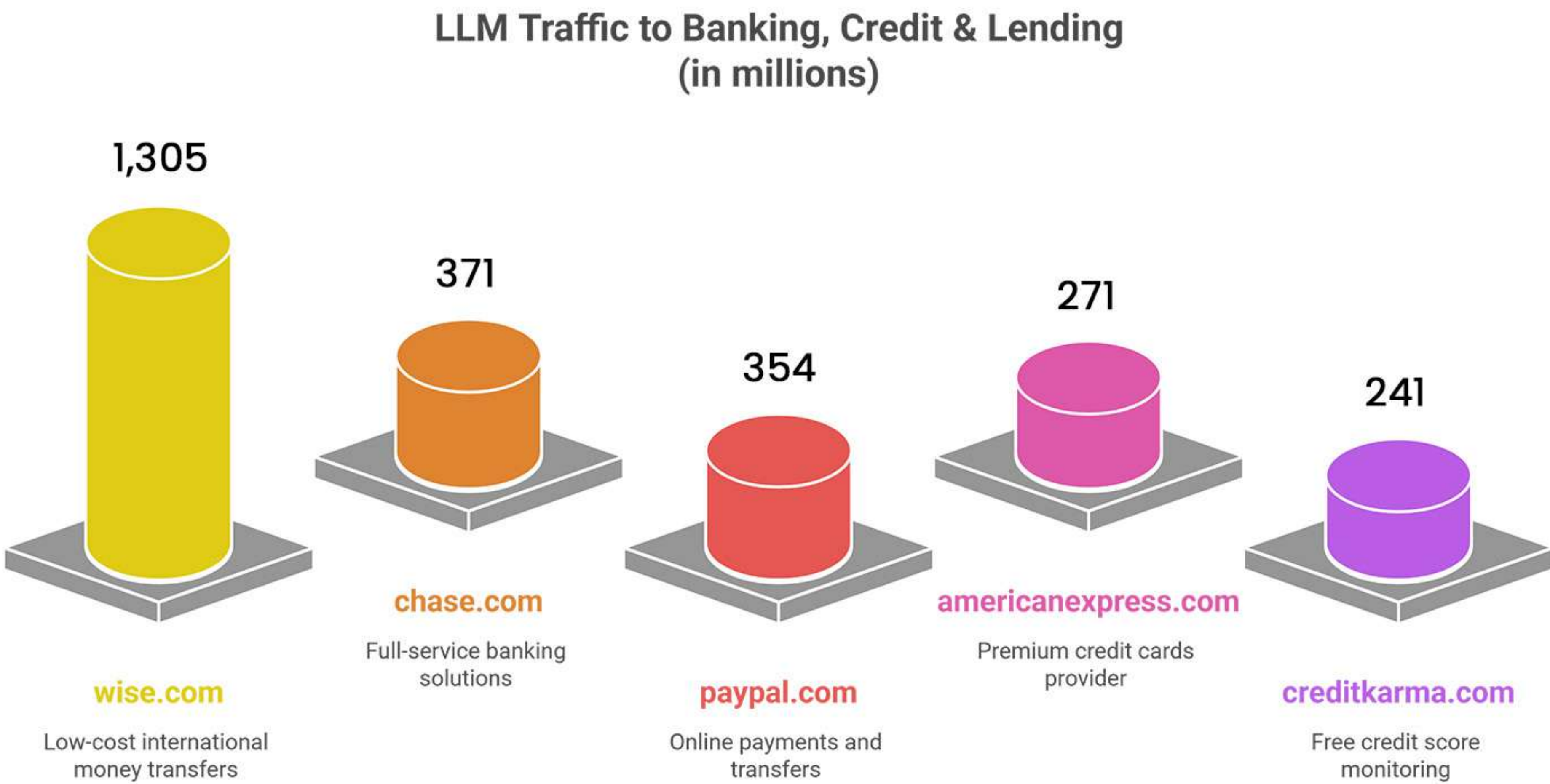


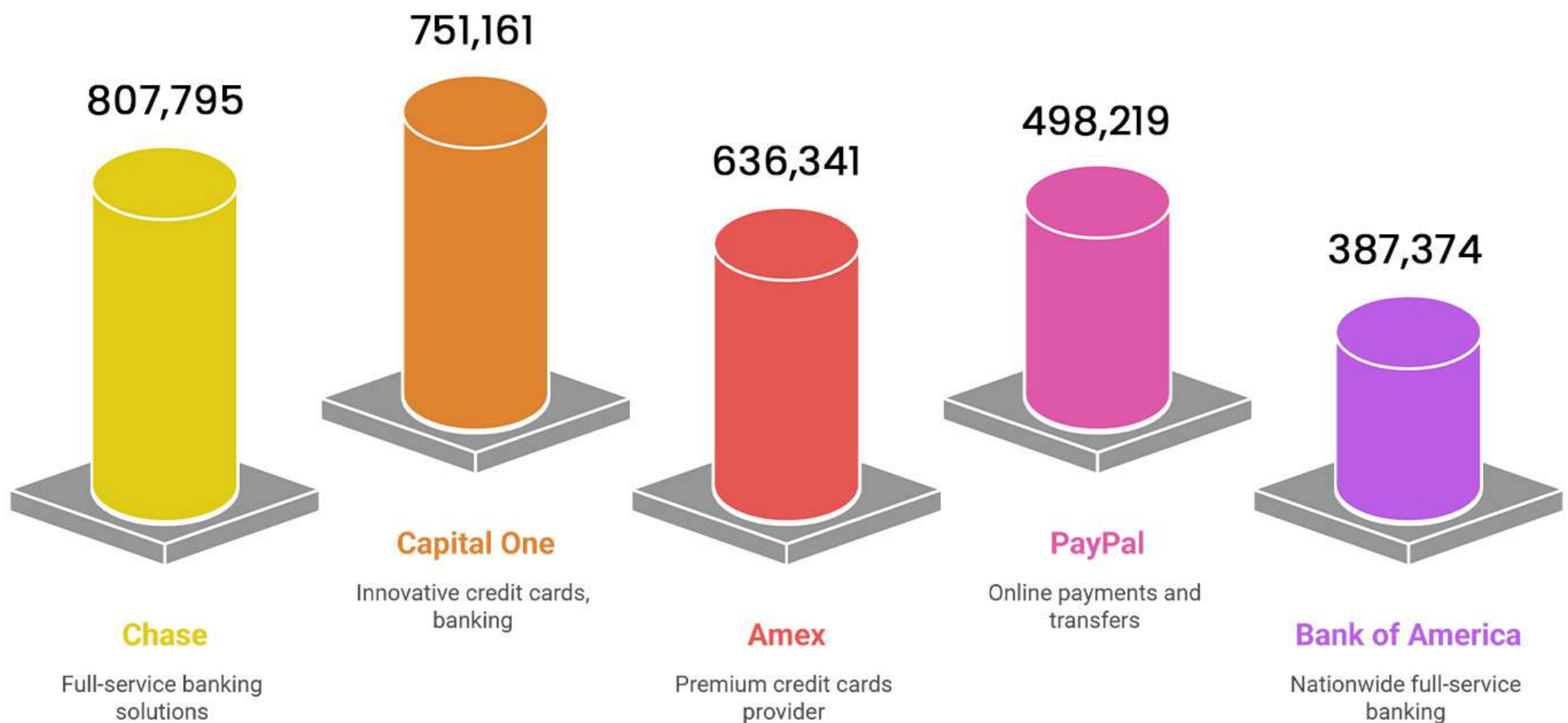
Key Insight:

AI visibility in banking is led by **fintech challengers like Wise** alongside traditional banks. While Wise drives the most LLM referrals (**1.3M**), legacy giants like **Chase** and **Capital One** dominate AI Overviews, showing a split between disruptive players in LLMs and incumbents in AIO.

Platform Performance

LLM referrals in banking are led by fintech players like Wise, showing how challengers can outperform incumbents in AI-driven citations. By contrast, AI Overviews favor traditional banks, Chase, Capital One, and Amex dominate, reflecting how established brand authority still drives visibility in this format.



AIO Traffic to Banking, Credit & Lending
(in thousands)» Chase: **808K**» Capital One: **751K**» American Express: **636K**» PayPal: **498K**» Bank of America: **387K****Takeaway:**

Fintech brands punch above their weight in LLM referrals, while traditional banks dominate AI Overviews, highlighting two different competitive battlegrounds.

LLM Referral Traffic vs Total Referral Traffic

LLM referrals contribute just 1% of all banking referral traffic, showing early traction but limited overall impact compared to other sectors.

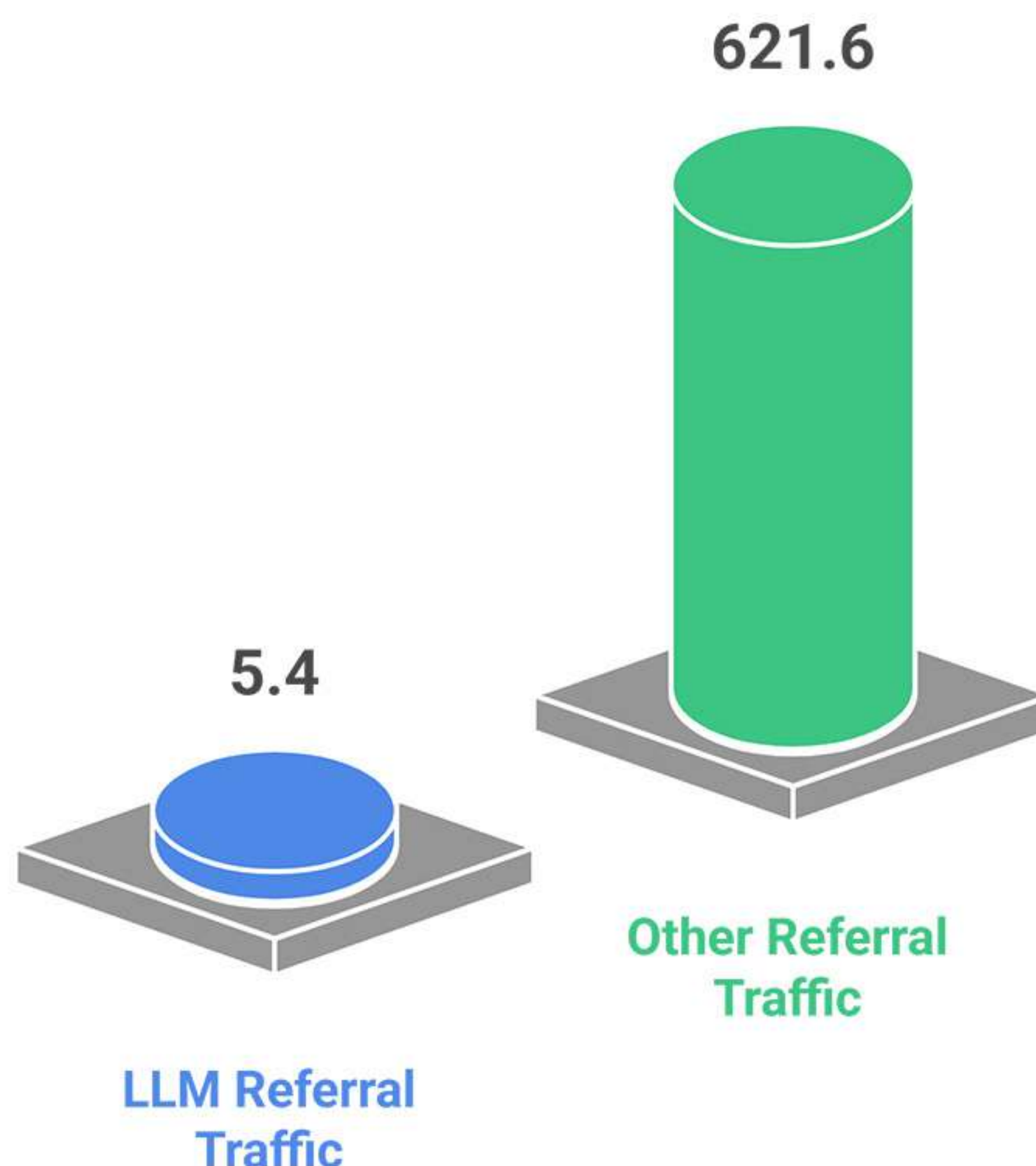
Traffic Comparison
(in millions)

» Total Referral Traffic:

621.6M

» LLM Referral Traffic:

5.4M (~1%)



Insight:

LLMs currently drive only 1% of referral traffic in banking, showing limited penetration compared to categories like Social Networks.

AI Overview Traffic vs Total Organic Traffic

AI Overviews already drive 4% of organic traffic in banking, underscoring their importance in a trust-heavy and competitive category

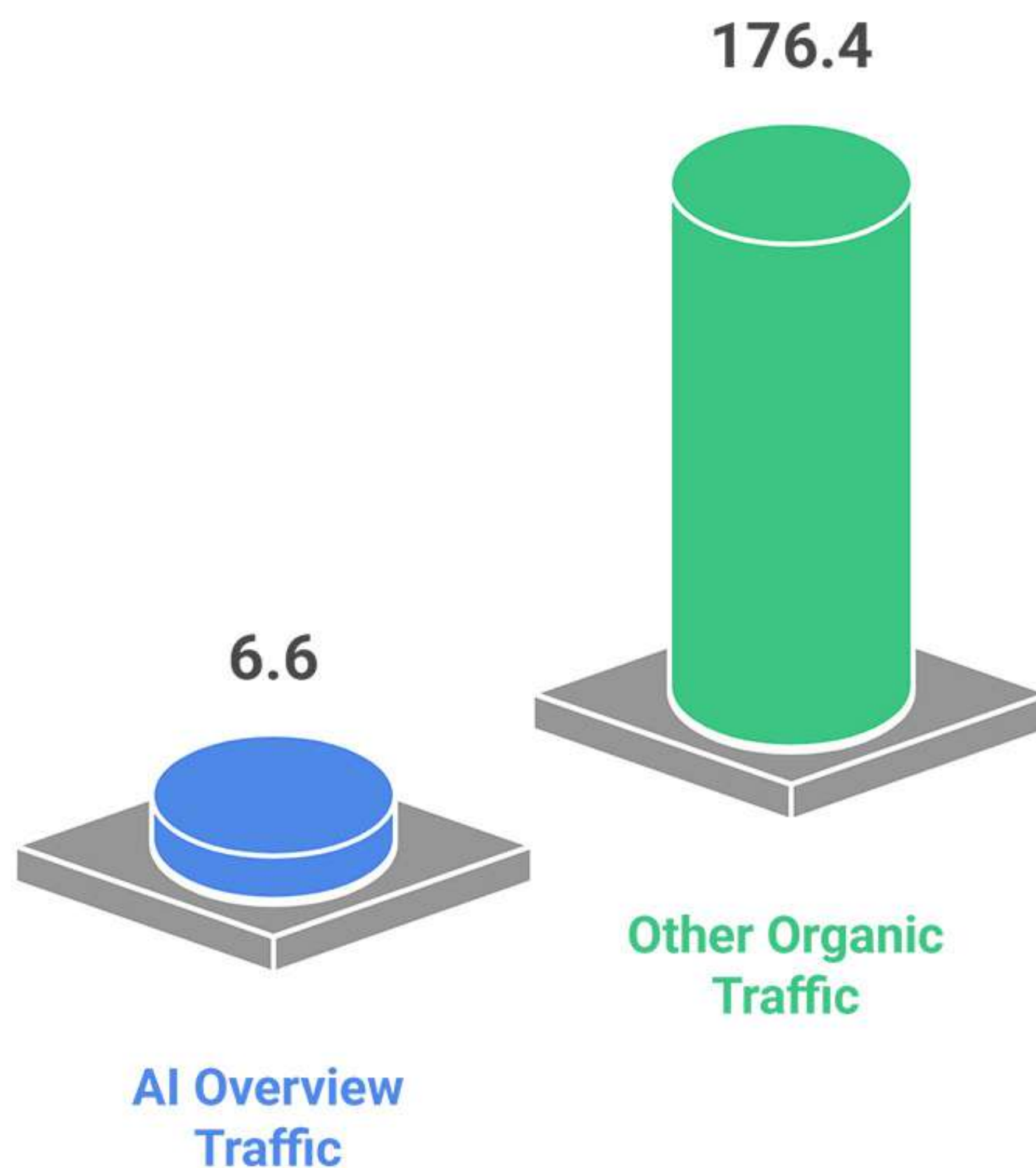
Traffic Comparison
(in millions)

» Total Organic Traffic:

176.4M

» AI Overview Traffic:

6.6M (~4%)

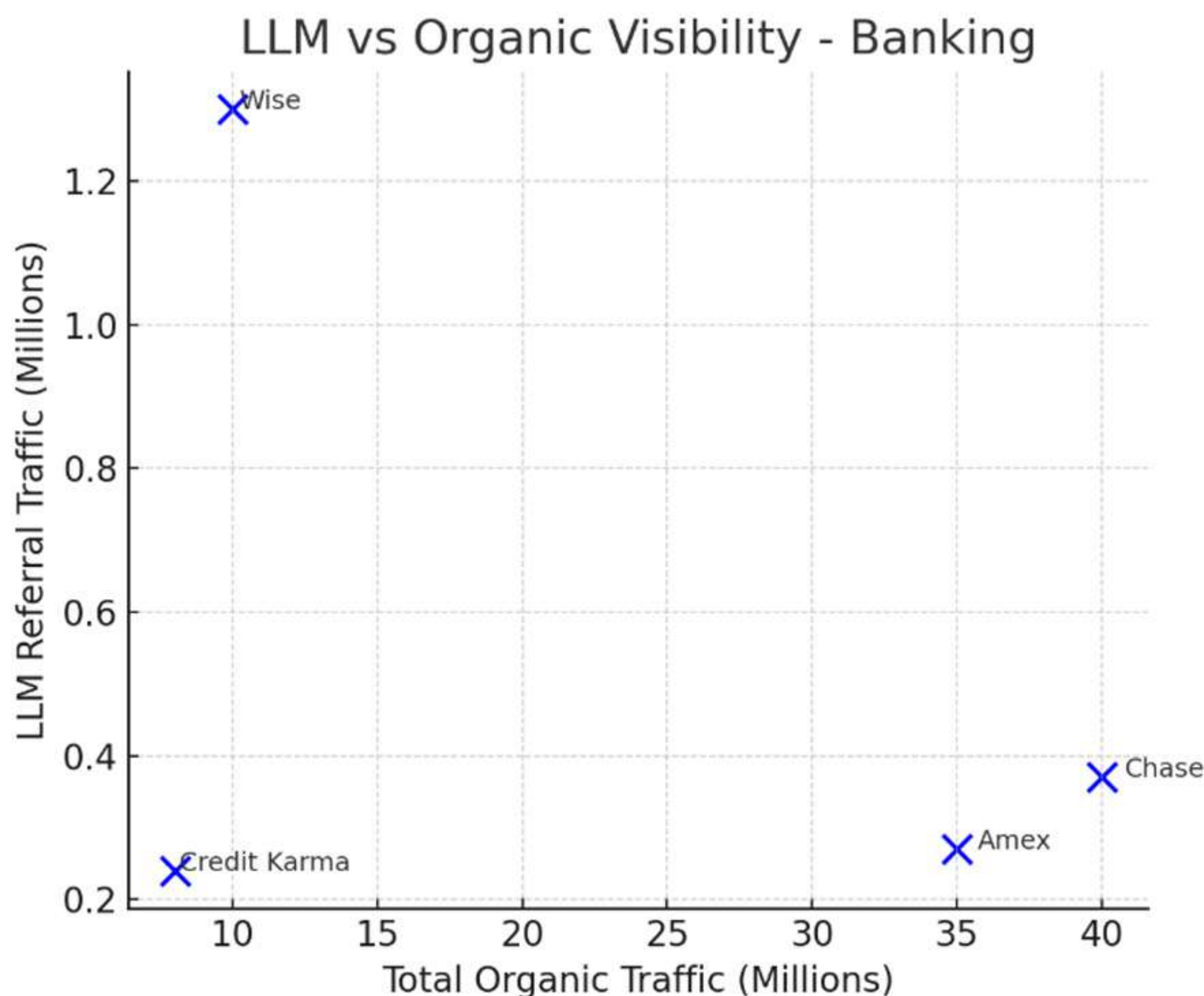


Insight:

AI Overviews drive 4% of organic traffic in banking, a meaningful share given the regulatory and trust-heavy nature of financial services.

LLM vs Organic Visibility

Wise and Credit Karma punch above their weight in LLM citations, while Chase and Amex underperform despite their massive organic reach.



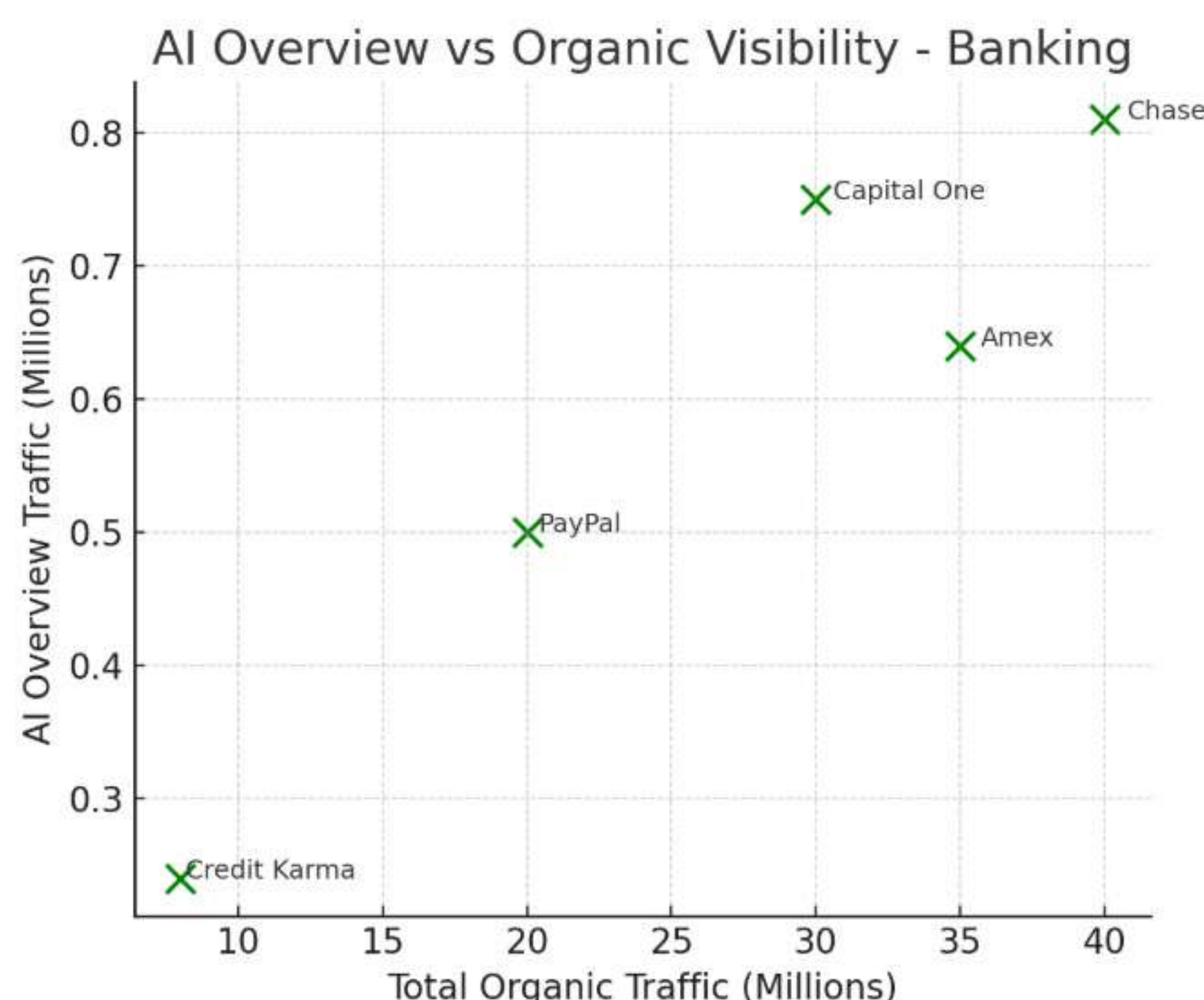
- » **High Organic & High LLM:** Wise: Strong LLM citations relative to its organic footprint.
- » **High Organic & Low LLM:** Chase, Amex: Huge organic traffic but limited LLM referrals.
- » **Low Organic & High LLM Share:** Credit Karma: Modest organic base but outsized AI citations.

Takeaway:

Fintech disruptors like Wise and Credit Karma are leveraging AI to compete head-on with traditional banks.

AI Overview vs Organic Visibility

AI Overviews amplify incumbent banks with strong brand authority, but smaller players like Credit Karma surface through niche, intent-driven queries.

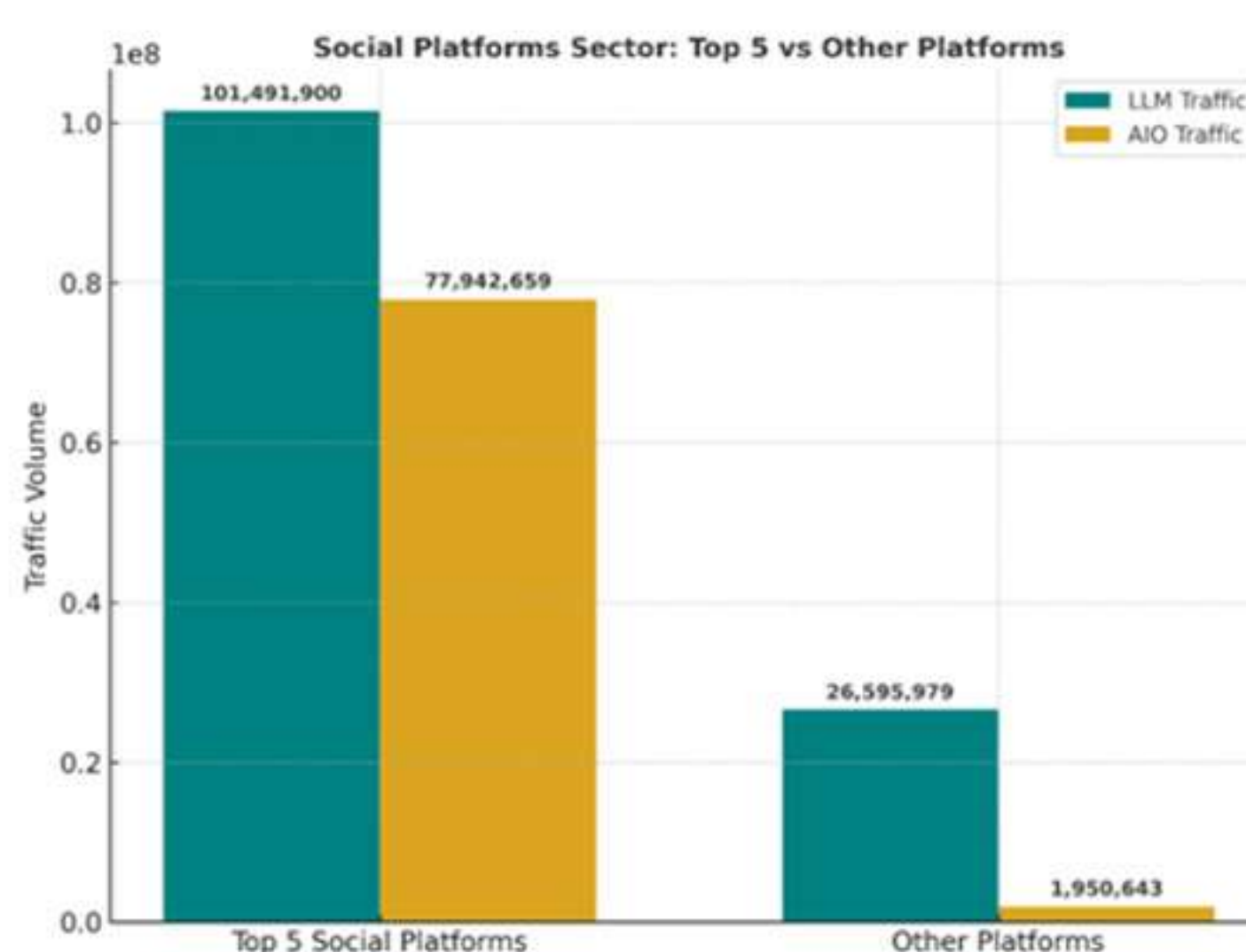


- » **High Organic & High LLM:** Chase, Capital One, Amex: Leading in both search and AI Overviews.
- » **High Organic & Low LLM:** PayPal: Strong organic but underperforming in AI Overviews.
- » **Low Organic & High LLM Share:** Credit Karma: Leverages niche queries to surface in AI answers.

Takeaway:

AI Overviews currently reinforce the dominance of top banks, but smaller players can carve niches in specialized queries.

Market Share Analysis: LLM and AIO Traffic Distribution Among Top 5 and Other Brands



Takeaway:

- » Top 5 platforms collectively generate 101,491,900 visits via LLMs, accounting for 79% of total LLM traffic. Other platforms contribute 26,595,979 visits (21%), highlighting the strong concentration of traffic among leading players.
- » The Top 5 platforms dominate AI Overview traffic with 77,942,659 visits, representing a massive 98% share. Other platforms capture just 1,950,643 visits (2%), showing negligible visibility in AIO compared to the leaders.
- » While LLM traffic shows some fragmentation with a 79–21 split, AIO traffic is even more consolidated, with the Top 5 virtually owning the entire channel.
- » Emerging or smaller platforms face a steep challenge in competing with top players for AIO visibility. For sustained growth, they must optimize aggressively for AIO, where leaders have already built a near-exclusive presence.

ADLIFT

JOBS & CAREERS



AN ADLIFT RESEARCH

Job & Career Sites – AI Search Visibility

The jobs and career sector is deeply tied to how people search, evaluate, and connect with employment opportunities. In this analysis among leading job and career brands, **Indeed** dominates across both LLM and AIO traffic, while platforms like **Glassdoor** and **ZipRecruiter** dominate in LLM visibility. This indicates that while one brand can lead comprehensively, others carve out influence through specific traffic channels.

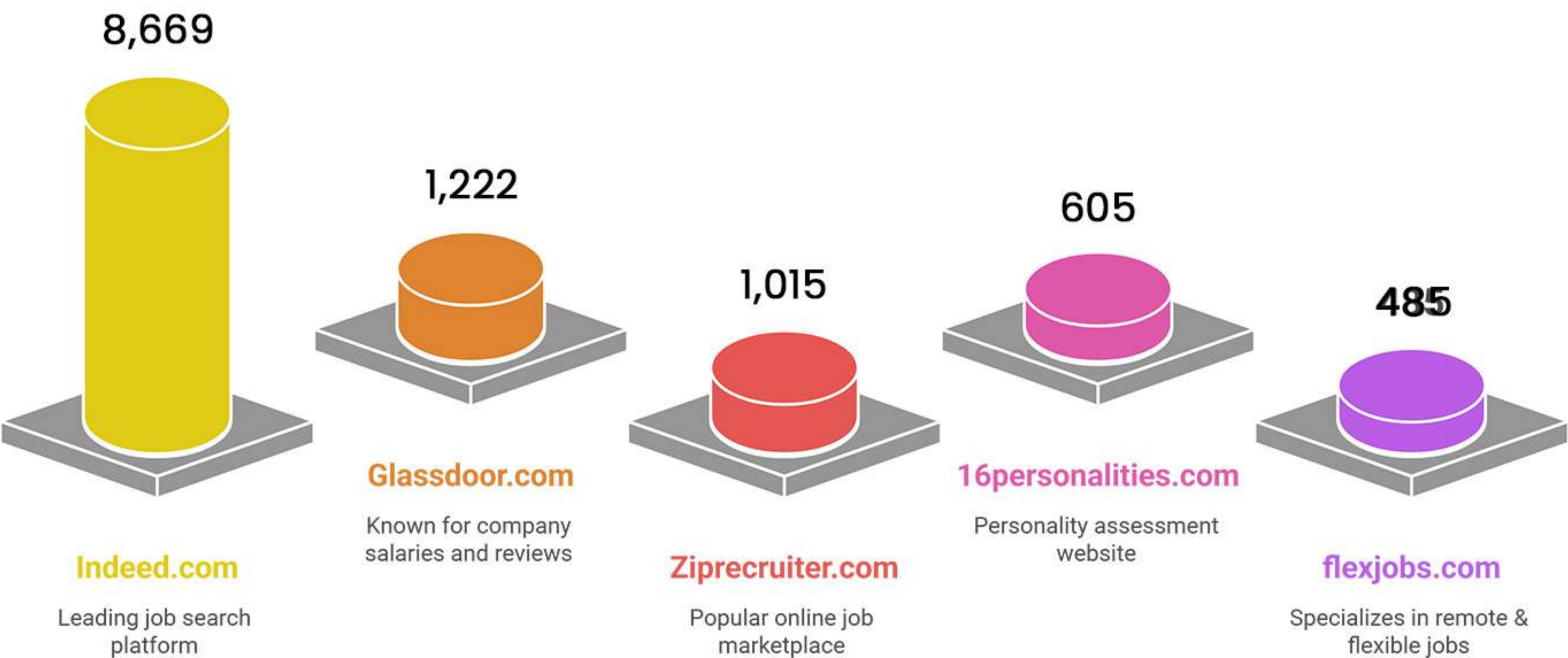
Below is a detailed analysis of traffic among the major players in the jobs and career sector.

Platform Performance

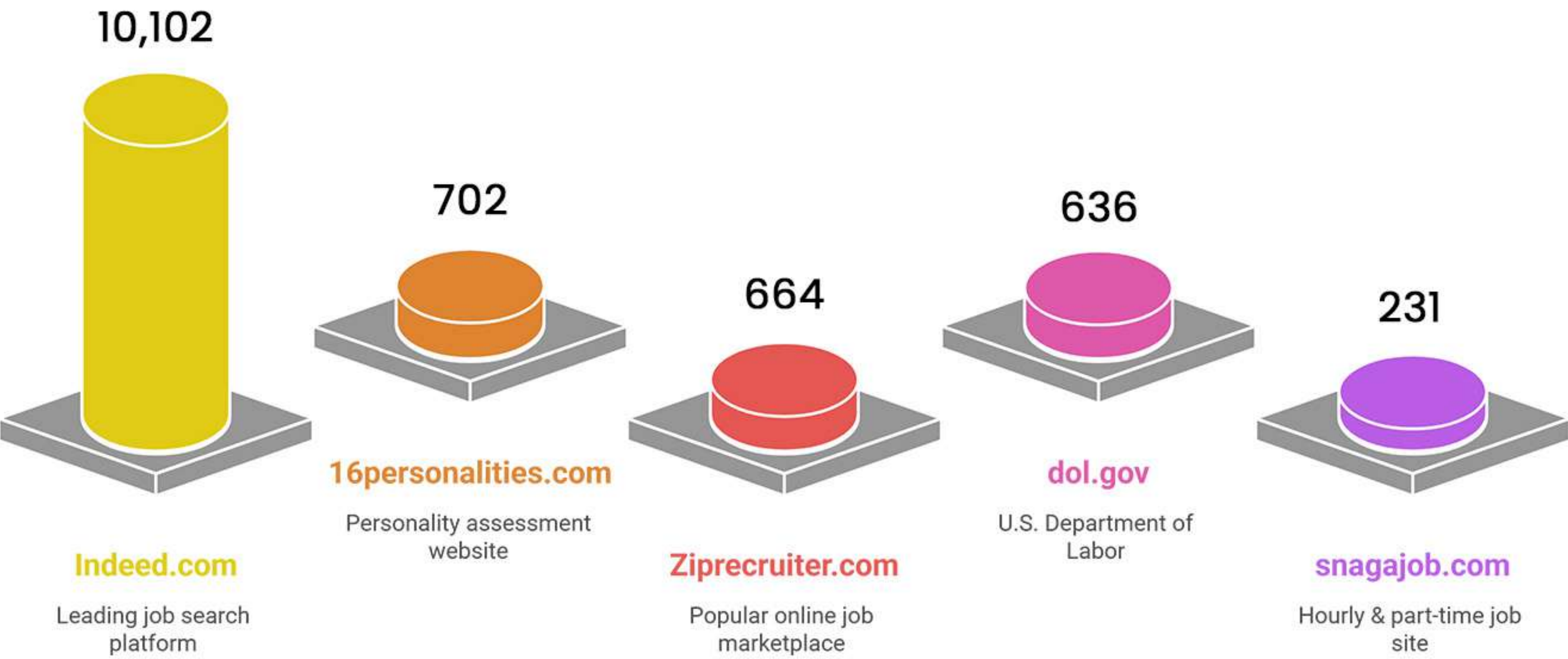
LLMs boost visibility for **job boards** (Indeed, Glassdoor, ZipRecruiter), while AI Overviews diversify into **assessment tools** and **government sites**, broadening the discovery funnel.

Job search is among the most AI-exposed sectors. **Indeed** dominates in both LLM referrals and AI Overviews, but challengers like **Glassdoor** and **ZipRecruiter** are strong in LLMs. Unconventional players like **16Personalities** and **DOL.gov** gain visibility in AI Overviews, showing AI discovery is not limited to job boards alone.

LLM Traffic to Jobs & Career Sites
(in thousands)

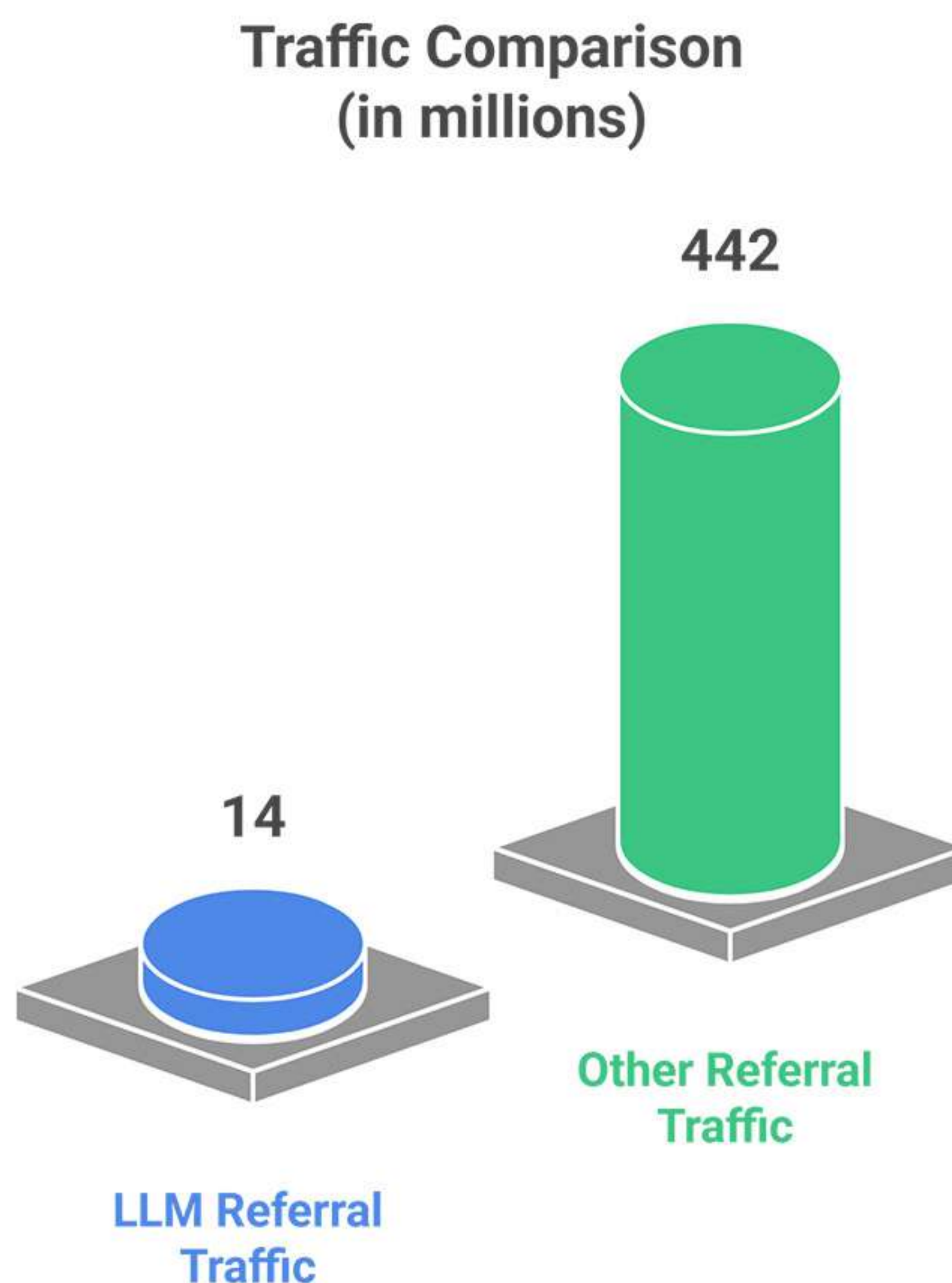


AIO Traffic to Jobs & Career Sites
(in thousands)



LLM Referral Traffic vs Total Referral Traffic

LLMs account for 3% of all referrals, modest in share, but impactful given the very high referral base in job search.

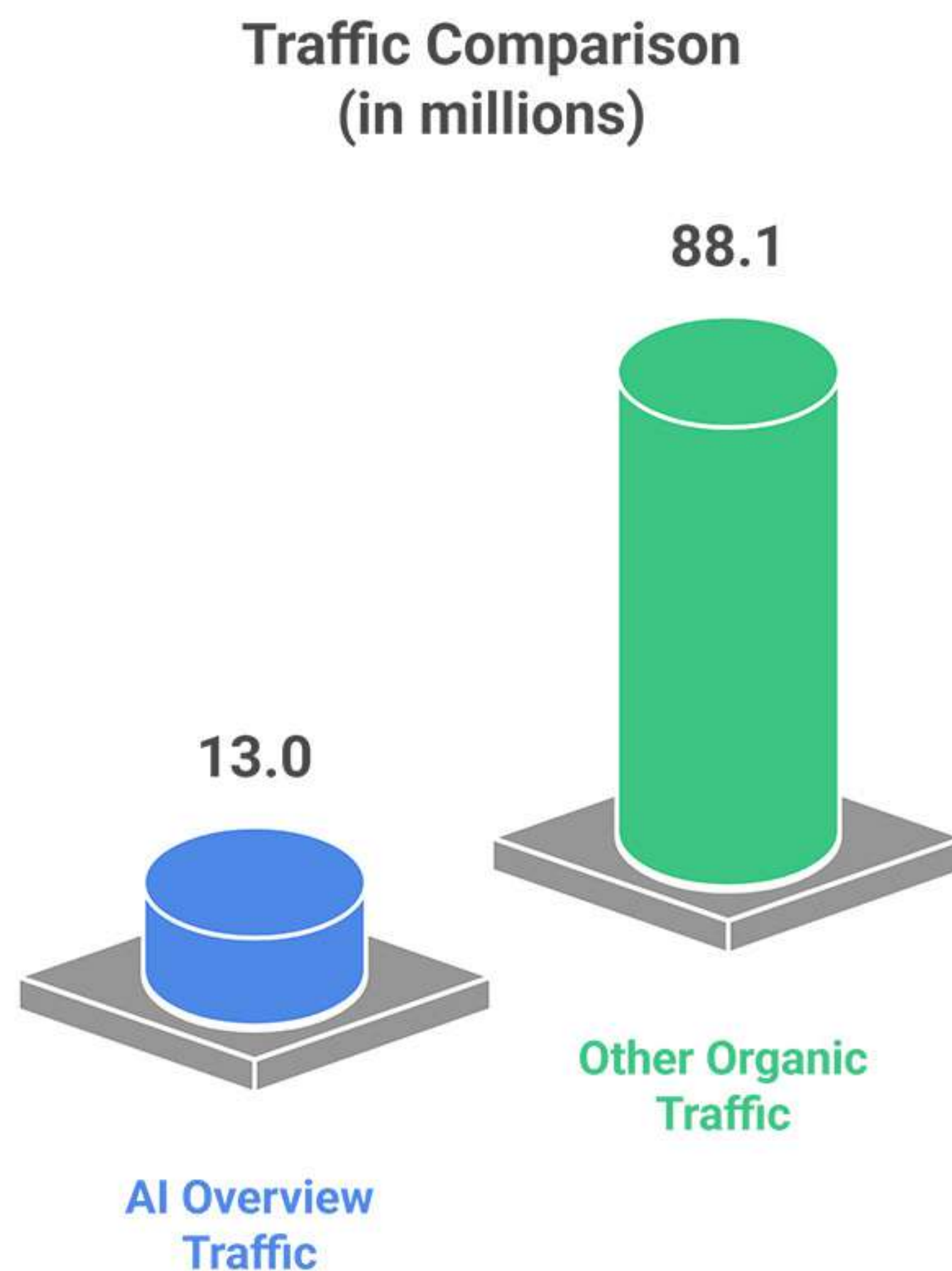


Key Insight:

While still early, LLM traffic is carving out a meaningful slice of referral traffic in one of the web's highest-traffic categories.

AI Overview Traffic vs Total Organic Traffic

AI Overviews are a powerful driver of discovery in job search, contributing 13% of organic traffic, the highest share we've seen across categories so far.

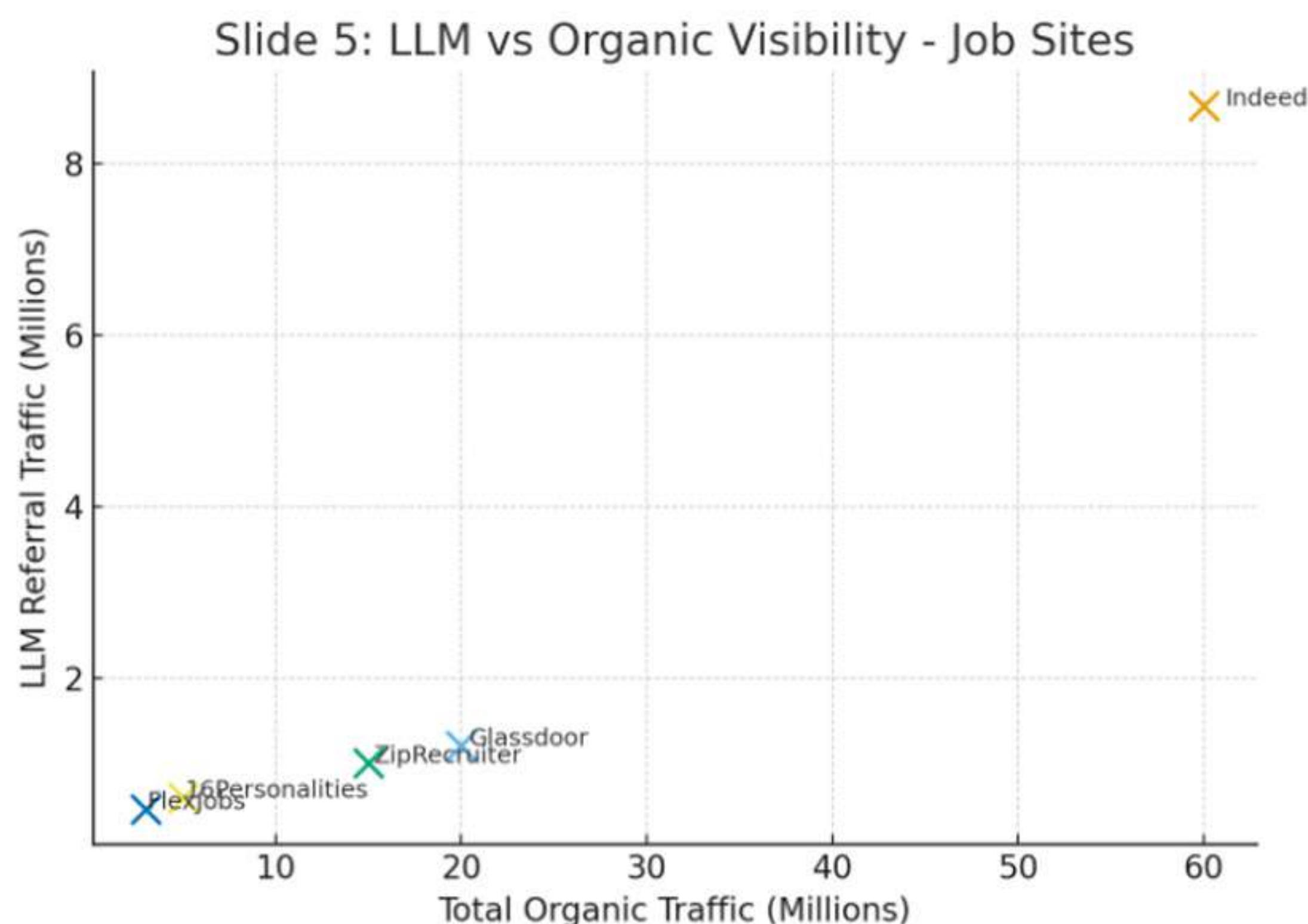


Takeaway:

AI Overviews are already rewriting the job search funnel, brands not optimizing here risk losing a double-digit share of organic discovery.

LLM vs Organic Visibility

Career boards dominate, but niche job and personality platforms can capture outsized visibility if they optimize for AI-driven citations.



» High Organic & High LLM

Indeed: A leader across both channels.

» Low Organic & High LLM Share

Glassdoor: Big in SEO, but under-indexed in LLMs.

» High Organic & Low LLM

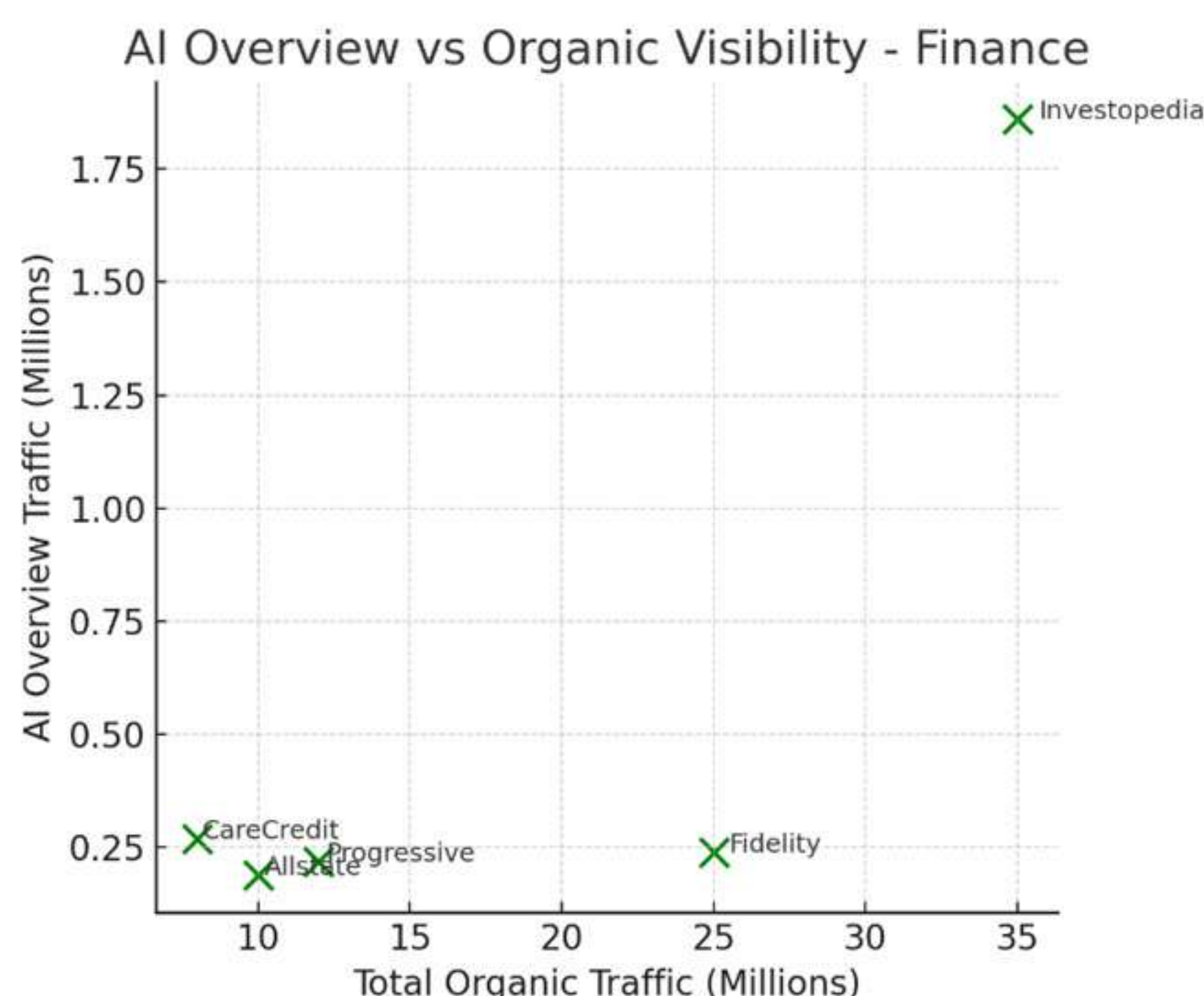
FlexJobs, 16Personalities: Small but punching above their weight.

Takeaway:

LLMs create opportunity for smaller players to compete on equal footing by focusing on the right formats and queries.

AI Overview vs Organic Visibility

AI Overviews **broaden the competitive set**, lifting assessment tools and public portals into the job discovery journey.



» High Organic & High AIO:

Indeed: Dominates in both.

» Low Organic & High AIO Share:

16Personalities, DOL.gov, Snagajob:
Non-traditional entrants gaining visibility in AI.

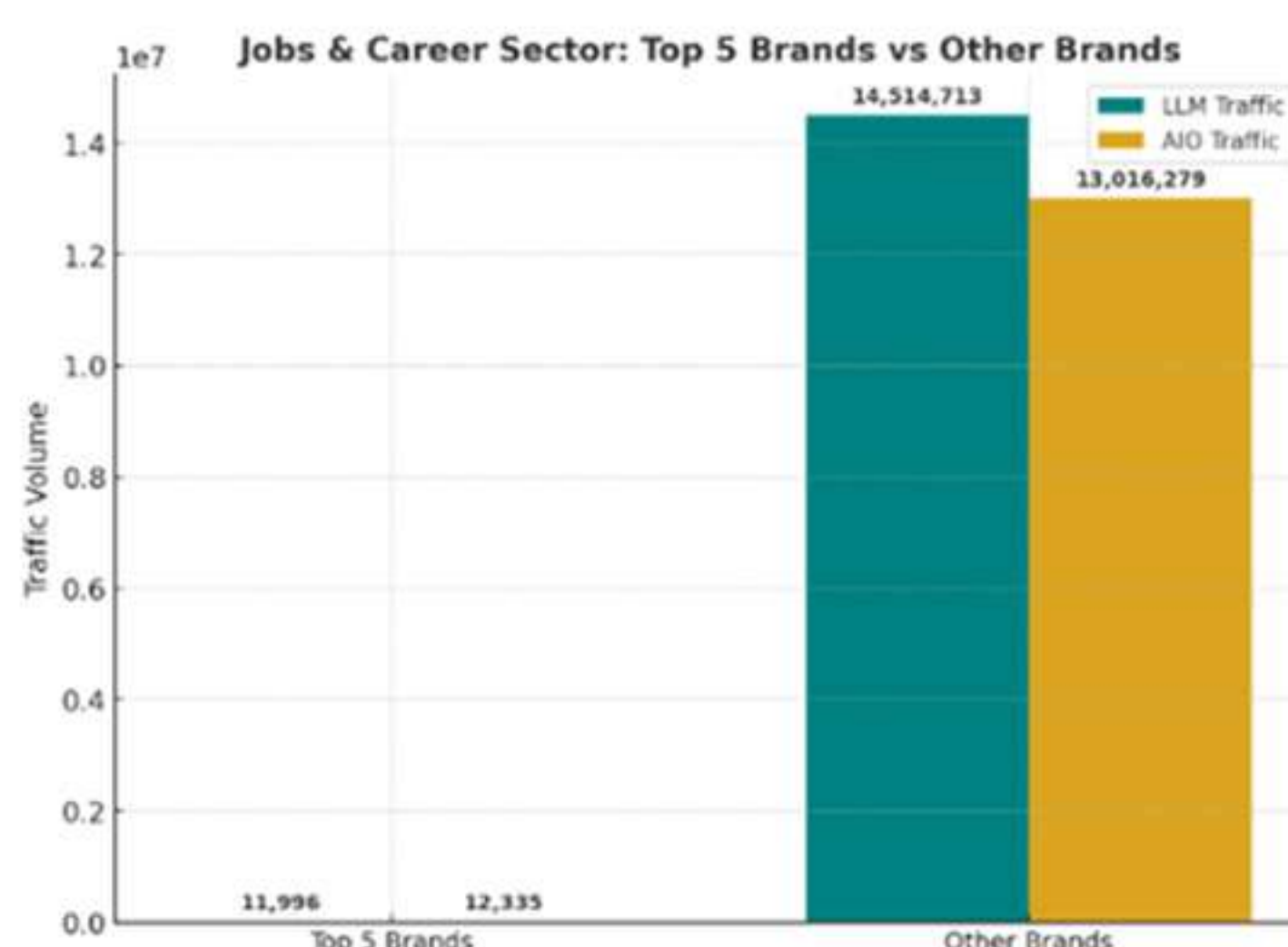
» High Organic & Low AIO:

Glassdoor: Good SEO reach, less AIO traction.

Takeaway:

Optimization for AI Overviews can catapult niche or government platforms into visibility head-to-head with giants like Indeed.

Market Share Analysis: LLM and AIO Traffic Distribution Among Top 5 and Other Brands



Key Insight:

- » Minimal LLM visibility: The top 5 brands in this sector collectively generate only 11,996 LLM referrals, almost negligible compared to the 14.5 million referrals captured by other brands.
- » AIO follows the same trend: Similarly, the top 5 brands attract only 12,335 AIO-driven visits, while other brands dominate with 13 million+ AIO referrals.
- » Heavy fragmentation: Both LLM and AIO traffic in this sector are highly fragmented, with no clear dominance from the top players.
- » Missed opportunities for top brands: The lack of significant traffic for the top 5 highlights that even established job platforms are not yet effectively optimized for LLMs and AI Overviews.
- » Sector-wide challenge: The dominance of “other brands” in both channels suggests that AI-driven discovery in jobs & careers is still evolving, leaving room for disruption by emerging players who optimize early.



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