SmokeLadder

SMOKELADDER ORIGINAL RESEARCH · NOVEMBER 2026

# Shifting *Landscapes*

## The Positioning and Messaging Volatility Study

How often 300 software brands changed their homepage positioning and messaging, read and analyzed every night for 30 nights.

**64%** of brands made a lasting change to their homepage messaging in 30 nights. One in six rewrote the headline.

OCTOBER 6 TO NOVEMBER 5, 2026

SMOKELADDER.COM

THE SHORT VERSION

# The top findings in *six numbers*

We read and analyzed the homepages of 300 software brands every night for 30 nights. Nearly two-thirds made a lasting change to their messaging. Every week about a quarter made a homepage change. And 19 brands repositioned.

CHANGED THEIR MESSAGE

## 64%

191 of 300 brands made a lasting change to their homepage messaging in 30 nights, after setting aside tests, rotating feeds, cosmetic edits and reverts.

REWROTE THE HEADLINE

## 1 in 6

52 brands rewrote the headline or hero section, the most valuable words they own.

REPOSITIONED

## 19

19 brands changed how they position themselves: a new headline and hero section, plus a rewritten page title, description or section headings. 5 are well-known name brands.

EVERY WEEK

## 1 in 4

An average of 73 brands a week made a lasting messaging change, and about 13 a week rewrote the headline.

CHANGING DAILY

## 12 per day

354 lasting messaging changes across the panel in 30 days. Not one day passed without seeing changes in the study.

LEADERS MOVE TOO

## 66%

95 of 145 well-known name brands made a lasting messaging change, more than the 62% of challengers. Market leaders are not the stable ones.

THE PANEL

300 software brands, fixed for the study

CATEGORIES

Marketing, Sales, Project Management, Communication, Security, Content

THE WINDOW

October 6 to November 5, 2026, 30 nightly captures

EACH CAPTURE

Three readings, six seconds apart; only text present in all three is kept

A CHANGE

Held two nights running and said something new; tests and reverts counted apart

THE SCALE

354 lasting changes; 52 brands rewrote the headline

WHY IT MATTERS TO EVERY BRAND

# When competitors change, your position can *erode*

Buyers don't read your homepage in a vacuum. When the brands around you move, the space between you and them moves too.

01

## Your position moves when theirs does

Positioning is relative. A buyer reads your homepage against the three or four others they have open. When a competitor rewrites their headline, the space you occupy changes, whether or not you touched a word.

02

## The angle you own can be claimed overnight

52 brands rewrote their headline or hero section in a single month. Any one of them could have moved onto ground you thought was yours. You may not even know it happened until the deal is lost.

03

## Your playbook goes stale between reviews

Battlecards, ad copy and sales talk tracks are written against a competitor's message. With a median of 7 days between changes, the message they are written against may already be gone.

04

## Leaders move as much as challengers

Well-known brands were not the stable ones. 66% of name brands changed their messaging, against 62% of challengers, and 26% of name brands were running live homepage tests.

AFTER ONE WEEK

**23%**

had already made a lasting messaging change.

IN 30 NIGHTS

**17%**

rewrote their headline or hero section.

DAYS WITH A CHANGE

**30 of 30**

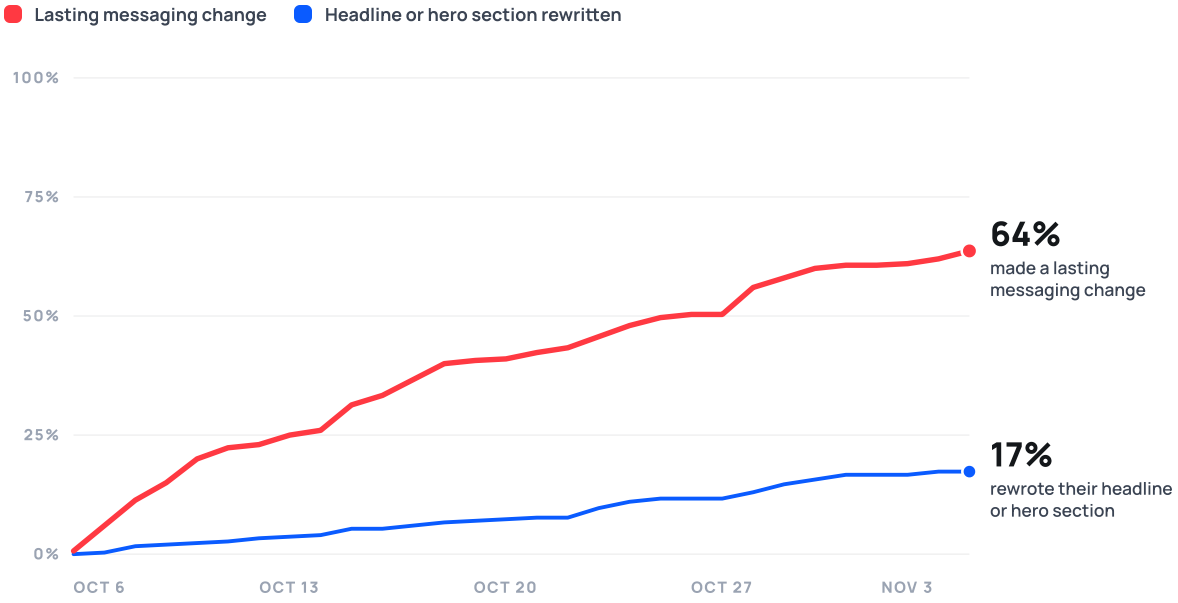
brought a lasting change somewhere in the panel.

SPEED OF POSITIONING AND MESSAGING CHANGES

# The market never sits *still*

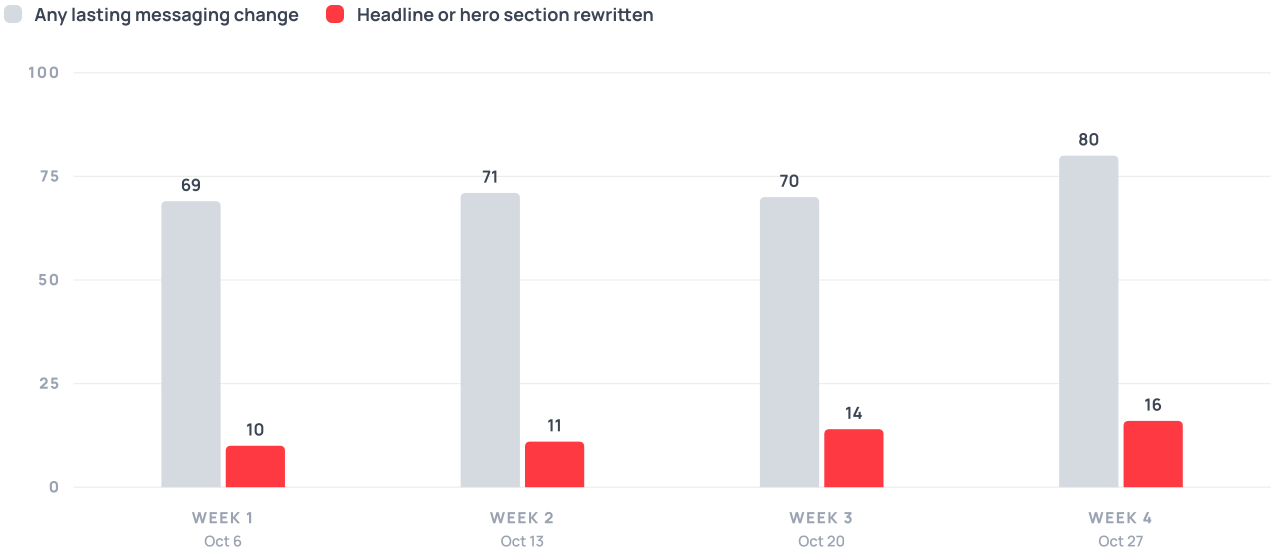
After one week, 23% of brands had made a lasting messaging change. By the last night it was 64%.

## Share of brands that had changed, night by night




The curve never flattens: new brands were still changing their message in the study's last week.

## Brands changing each week



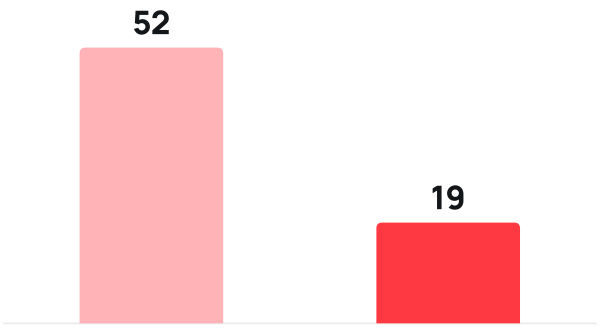

On average 73 brands a week made a lasting messaging change, about one in four, and 13 a week rewrote the headline.

DEPTH OF POSITIONING AND MESSAGING CHANGES

# This is a study of *real change*, not noise

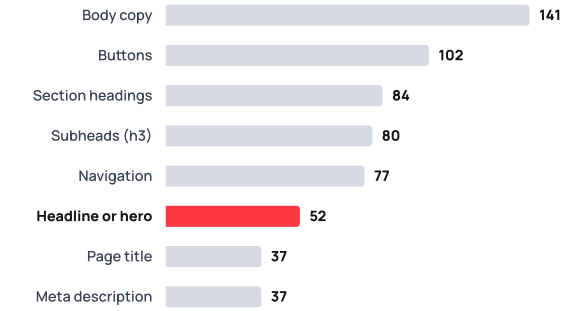
We set aside things like cosmetic edits, A/B tests, and rotating banners or blog posts. Our focus was on shifts of the ideas and strategy that sell.

## What kind of change




52 brands rewrote the headline or hero section. 19 of them went further and repositioned, rewriting the page title, description or section headings as well.

## Where changes happened




Brands with a lasting change in each part of the homepage; most changed more than one. The red bar is the 52 brands that rewrote the headline or hero section. Smaller wording edits there, like adding a word to a headline, count toward the 64% but not toward this bar.

## How many times each brand changed



**109**
No lasting change

**96**
One change

**55**
Two changes

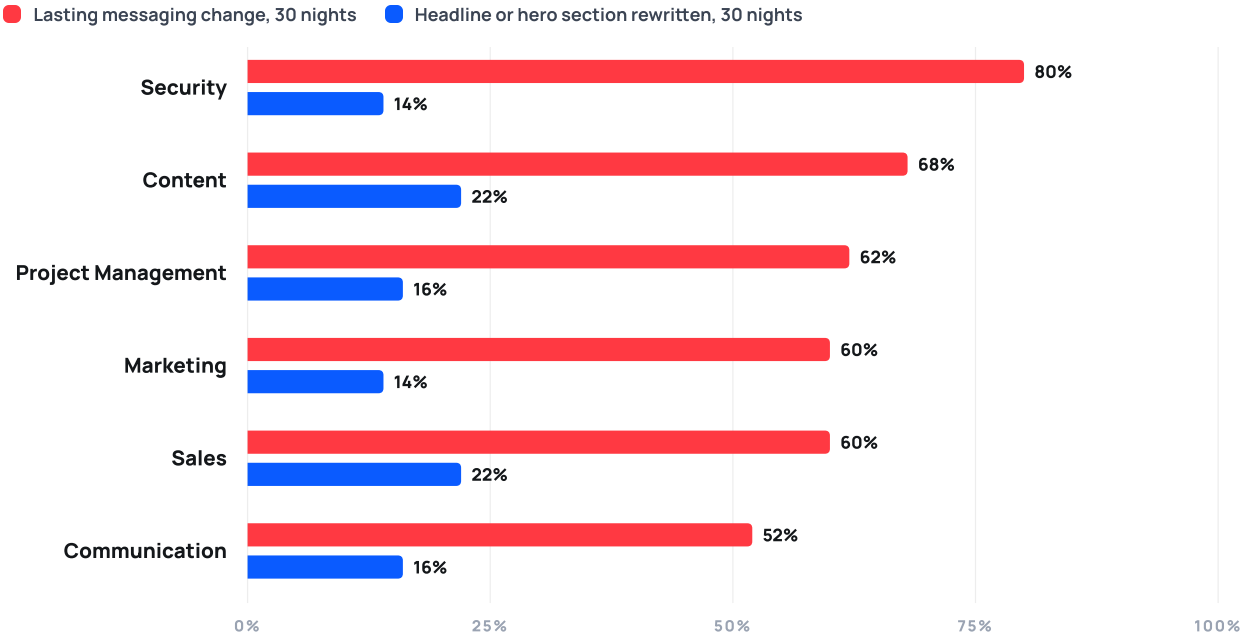
**40**
Three or more

40 brands made three or more lasting changes in 30 nights.

# How much did each category *move*?

80% of security brands made a lasting messaging change in 30 nights, the most of any category. Even the calmest category, Communication, saw 52% of its brands change.

## Change by software category




| CATEGORY | LASTING CHANGE | HEADLINE | CHANGES | A/B TESTING |
|---|---|---|---|---|
| **Security** | 80% | 14% | 82 | 11 |
| **Content** | 68% | 22% | 64 | 7 |
| **Project Management** | 62% | 16% | 46 | 5 |
| **Marketing** | 60% | 14% | 71 | 11 |
| **Sales** | 60% | 22% | 51 | 11 |
| **Communication** | 52% | 16% | 40 | 12 |

THE PAST 12 MONTHS

# Not a busy season. A *pattern*.

To check that the study did not just catch an unusual autumn, we read one archived homepage per brand per month for the year before it began.

CHANGED TITLE, DESCRIPTION OR HEADLINE

**83%**

228 of 275 brands with a year of archived homepages.

CHANGED THEIR HEADLINE

**67%**

183 of 275 brands changed the headline and kept the new one the following month.

SECURITY BRANDS

**91%**

made a lasting headline change in the past year, the most of any category.

## A year of Fortinet headlines

| | |
|---|---|
| SEP 2025 | A Leader in Hybrid Mesh Firewall |
| OCT 2025 | Born Integrated. Built Intelligent. Only FortiAI. |
| JAN 2026 | Close Security Gaps and Increase Network Performance |
| APR 2026 | Born Integrated. Built Intelligent. Only FortiAI. |
| MAY 2026 | Speed Is the New Cyber Battleground |
| JUL 2026 | Unified, Automated, and Powered by Agentic AI: The SOC Reimagined |
| AUG 2026 | The Unified Endpoint for the AI Era |

## A year of monday.com headlines

| | |
|---|---|
| SEP 2025 | One AI work platform for any kind of work |
| NOV 2025 | From managing work, to doing work for you |
| DEC 2025 | From managing work, to doing the work for you |
| FEB 2026 | Outpace everyone with the best AI work platform |
| MAY 2026 | You lead. Agents act. |
| SEP 2026 | People and agents driving work forward |
| OCT 12 | People and agents work best in one AI workspace |
| OCT 30 | The AI workspace for people and agents |

CASE STUDIES

# What changed, in their *own words*

Three name brands that changed their positioning in the month and kept it, each a different kind of move. Every headline was read from the brand's live homepage on the night shown.

COMMUNICATION

## Front

01 · SCOPE: SPECIALIST TO PLATFORM

### From the hard tickets to the whole customer team

Front used to sell against the rest of the market: AI for simple support was everywhere, and Front was for the complex work. On October 8 it rewrote every part of the homepage, from the page title and description to the navigation and buttons. The new page is for every customer-facing team, support, sales and operations, and for their AI agents. The old contrast survives only as a section heading further down.

**Widening the audience redraws the competitive set. Front now speaks to the buyers of sales and operations tools, not only to support leaders, and every brand on either side of that line has a new neighbor.**

BEFORE

**"AI for simple support is everywhere. Complex customer operations demand Front."**

The modern CX platform combining client communication, automation, and analytics for customer-first teams.

AFTER · OCT 8

**"All your teams. All your AI agents. One place to run customer work, together."**

Bring support, sales, operations, and AI agents together to resolve every request and build stronger customer relationships, from first hello to renewal.

First seen October 7 and still the headline on November 5, the study's last night: 29 nights in all.

CONTENT

## Writer

02 · PROMISE: PRODUCT TO OUTCOME

### Leaning into a much wider vision

Until October 25, Writer's headline said what it sold and who it was for: AI agents, for marketing and revenue teams, from first touch to close. The new page leads with the result instead. The headline, page title and description changed together, "agentic work" left the page title, and the section headings now speak to "enterprise growth leaders" and control.

**Moving from product to outcome changes what a buyer compares. Writer stopped competing on what its agents do and started competing on the growth it promises, ground that every revenue platform wants.**

BEFORE

**"From first touch to close. AI agents for marketing and revenue teams."**

Page title: The enterprise AI platform for agentic work

AFTER · OCT 25

**"Reach the frontier of enterprise growth"**

The AI platform that turns market signals and enterprise intelligence into new ways to grow revenue.

Confirmed October 25, the newest of the three. Still the headline on November 5.

PROJECT MANAGEMENT

# ClickUp and monday.com

03 · CONVERGENCE, THEN A NEW TEST CYCLE

## Two rivals circling each other

ClickUp's headline was one of the most distinctive in its category: "Software to replace all software." On October 7 it became "One Workspace built to think and work." Five days later monday.com, whose page title already read "The AI Workspace for People & Agents," moved the same words into its headline, first as "People and agents work best in one AI workspace" and then, on October 30, as "The AI workspace for people and agents." By the end of the study the two best-known brands in project management led with the same message. Then ClickUp went back to testing. Since the study closed, its homepage has rotated through several new headlines, some built on its AI "Brain" ("All apps, in one superapp. Every AI, in one Brain"), another reading "Work like there are 100 of you." None has won yet, but ClickUp is plainly looking for a way to stand apart again.

**Two rivals landed on the same message within weeks, and the one that got there first is already testing its way back out. In a crowded category, every move by one brand changes the ground under the other, and the cycle does not stop at the end of a study.**

CLICKUP, BEFORE

"Software to replace all software"

CLICKUP · OCT 7

"One Workspace built to think and work"

ClickUp connects your work, knowledge, and conversations to AI that can find answers, take action, and build alongside you.

MONDAY.COM · OCT 30

"The AI workspace for people and agents"

Before: "People and agents working as one team"

CLICKUP · NOVEMBER, TESTING

"All apps, in one superapp. Every AI, in one Brain."

Also in rotation: "Work like there are 100 of you"

ClickUp's October headline held all 30 nights of the study. monday.com's is its second rewrite of the month, live since October 29. Since the study closed, ClickUp has been testing new headlines; none has won yet.

## Also repositioned, and held

- Basecamp, October 17: from "The refreshingly straightforward project management system that's rock-solid and easy to use" to "Manage projects, coordinate teams, and master your company with Basecamp."
- ActiveCampaign, October 25: from "Cut 13 hours of marketing busywork each week with autonomous marketing" to "Run the marketing you never had time for."

## Some tested, then reverted

Not every move holds. Twilio swapped "The platform for conversations in the AI era" for "Reaching a business shouldn't be a nightmare" on October 23 and put the original back on November 5, just past the two weeks the study allows a test. Across the panel, 16 changes were reverted within two weeks and 57 brands alternated between two homepages; those are counted apart from every figure here. We did not make these moves case studies, because within the study's window each brand ended where it started. A study is a window in time: these brands will keep moving after it closed, and some of these tests may yet become the new message.

FINAL THOUGHTS · WHAT TO DO ABOUT IT

# Keep an eye on the market without being *distracted*

Not every change on a competitor's homepage deserves a response. The ones that rewrite the headline or redraw who they sell to do. The job is to catch those early, without chasing every edit.

01

## Find the right balance

A homepage carries a lot of noise: tests, banners, small edits that come and go. But with a median of 7 days between real changes, a competitor you check once a quarter may already have eroded your position by the time you look.

02

## Watch the hero section first

The headline and the opening lines are where repositioning shows up. A change there is worth a same-day look; a changed footer is not.

03

## Separate tests from decisions

19% of brands were running live tests. A one-night difference is usually an experiment. A change that holds is a decision, and the one to respond to.

04

## Re-check your own position when they move

When a competitor moves onto your ground, the question is not what they said. It is whether your message still sounds like nobody else.

SmokeLadder

## See the moves that matter. Skip the noise.

SmokeLadder reads your competitors' homepages every night, sets aside tests, rotations and cosmetic edits, and tells you when one makes a real move onto your ground. It's the same capture method behind this study.

**Try it free at smokeladder.com**

METHODOLOGY

# Built to track *signal* over noise

The study tests SmokeLadder's own claim, that competitors move faster than anyone can watch by hand. To support accuracy we focus on real strategic changes.

| | |
|---|---|
| THE PANEL | 300 homepages, fixed for the study: six software categories (Marketing, Sales, Project Management, Communication, Security, Content), 50 brands each. 145 are well-known name brands and 155 are challengers, screened from 425 candidates for pages a browser can read. |
| THE WINDOW | The capture began on September 13. This report counts the 30 nights from October 6 to November 5, 2026: the first full month with every rule below in place, including the check that tells a rotating blog or news feed from a rewrite, added on October 5. The earlier nights are used only as history, so a version a brand showed in September is not counted as new in October. |
| THE CAPTURE | Every night at 10:00 UTC. Each homepage was read three times, six seconds apart, and only text present in all three readings was kept, so carousels, rotating testimonials and typing animations drop out. Cookie banners, consent text and legal links were removed. 1% of captures were blocked or empty and were treated as missing, never as unchanged. |
| WHAT COUNTS AS A CHANGE | A new version had to appear on two consecutive readable nights, and had to say something the brand had never shown before. A return to a version from the previous 14 days was an A/B test or rollback, counted separately and never as a change. |
| HOW DEEP | Each change was given a tier. Cosmetic: only digits, case, punctuation or three words or fewer. Copy edit: anything else below the headline. Hero shift: the headline or the first 30 words of the hero section substantially rewritten. Repositioning: a hero shift where the page title, description or section headings changed as well. Tiers were calibrated against 60 changes labeled one by one. |
| COUNTED APART | Event and campaign takeovers of the headline (6), blog and news feeds rotating (13), cosmetic edits (61), reverted changes (16) and A/B switches (126) are all excluded from the headline figures. |
| CONTENT FEEDS | From October 5 each capture marks blog, news and event lists, so a feed rotating to new posts is set aside rather than counted as a rewrite (13 such updates). |
| THE LOOK-BACK | One Internet Archive capture per brand per month for the 12 months before the study, compared on page title, description and headline only. 275 brands had two or more archived months. A headline change counts only if the new headline held the following month and was not a return to one from the three months before. |

## What this study does not show

- Homepages only, in English, in six software categories. Other categories, other pages and other markets may move faster or slower.
- Thirty nights is a short window. The panel stays fixed so the same brands can be read again at 90 and 180 days.

THE PANEL

# The 300 brands in the *study*

6 software categories, 50 brands in each. The panel was fixed for the study: every brand below was read every night for all 30 nights.

## Marketing

ActiveCampaign
AdWave
Ahrefs
Attentive
Audience Genomics
Bitly
Bloomreach
Brandbassador
Braze
Brevo
Buffer
Case Study Buddy
ConvertFlow
DashClicks
Deeto
Demandbase
eClincher
HighLevel
Hootsuite
Hotjar
HubSpot
HypeAuditor
Iconosquare
Ideally
Influitive
iSpot.tv
Iterable
Klaviyo
Later
Leadfeeder
Mailchimp
MNTN
Moz
Mutiny
Omnisend
Optimizely
Pathmatics
Pixis
Planable
Rebrandly
Semrush
Sendoso
Similarweb
Sprout Social
StackAdapt
Testimonial.to
UserTesting
Vibe
Yotpo
Zuberance

## Sales

11x
Amplemarket
Apollo
Artisan
Atrium
Attio
Aviso
Avoma
B2B Rocket
BoostUp
Chili Piper
CIENCE
Clari
Clay
Clientjoy
Cognism
Consensus
Copper
Demostack
Dux-Soup
Ebsta
Gong
Guideflow
Highspot
Humantic AI
Hunter
Instantly
Jiminny
Lead411
LeadIQ
lemlist
Lusha
Method CRM
Nutshell
Outreach
People.ai
Pipedrive
Qualified
RB2B
Regie.ai
Reprise
Saleo
Salesloft
SalesRabbit
Seamless.AI
Skej
Smartlead
Tourial
Unify
Vidyard

## Project Management

Accelo
Aha!
Airtable
Asana
Basecamp
Businessmap
Celoxis
ClickUp
Coda
Dart
Fibery
Float
Flowlu
Freedcamp
GanttPRO
Hive
Kantata
Leantime
Linear
MeisterTask
monday.com
Moovila
Motion
Nifty
Notion
OpenProject
Paymo
Pipefy
Plane
Planview
Productboard
ProjectManager
ProofHub
Quire
Rocketlane
Scoro
Shortcut
Smartsheet
Sunsama
Taiga
Taskade
TeamGantt
Teamhood
Teamwork.com
Todoist
Trello
Workstreams.ai
Wrike
ZenHub
Zenkit

## Communication

Aircall
Airmeet
BigMarker
Circle
Demio
Dialpad
Discord
Element
Fathom
Fireflies.ai
Five9
Flock
Front
Genesys
Goldcast
Google Workspace
GoTo Webinar
Grain
Granola
Happeo
Igloo
Jostle
Krisp
Lark
Livestorm
LumApps
Mattermost
Mighty Networks
Missive
Nextiva
Notta
Otter.ai
Poppulo
Powell Software
Pumble
Read AI
RingCentral
Rocket.Chat
Sembly AI
Simpplr
Slack
Staffbase
Superhuman
Tactiq
tl;dv
Twilio
Unily
Whereby
Workvivo
Zoom

## Security

1Password
Abnormal Security
Arctic Wolf
Blumira
Chainguard
Check Point
Cloudflare
CrowdStrike
CyberArk
Cyera
Darktrace
Dashlane
Delinea
Exabeam
Expel
Fortinet
Hunters
Huntress
Island
JumpCloud
Kandji
Keeper Security
KnowBe4
LastPass
Malwarebytes
Material Security
Mimecast
Netskope
NordLayer
Okta
Palo Alto Networks
Panther
Qualys
Rapid7
Recorded Future
Red Canary
SailPoint
Securonix
SentinelOne
Snyk
Sumo Logic
Tailscale
Tenable
Thoropass
Torq
Trend Micro
Vanta
Wiz
WorkOS
Zscaler

## Content

Acast
Alitu
Auphonic
Be.Live
Beautiful.ai
beehiiv
BOFU AI
Builder.io
Buzzsprout
CapCut
Cincopa
Clearscope
Clipchamp
Contentstack
Copy.ai
Descript
Ecamm
ElevenLabs
Ghost
HeyGen
Higgsfield
Hygraph
Hypotenuse AI
InVideo
JW Player
Kapwing
Kleo
Loom
Murf AI
Opus Clip
Pepper Content
Peppertype.ai
Pika
Podbean
Prismic
Runway
Rytr
Sanity
Screencastify
SlidesAI
Storyblok
Substack
Synthesia
Tella
Transistor
Vimeo
Wistia
WordPress.com
Writer
Writesonic

SmokeLadder

# Know when a competitor makes an important move.

SmokeLadder tracks your competitors' messaging, separates real changes from tests and rotations, and tells you when one moves onto your ground. Then it scores what that means for your own positioning. The same capture method ran this study.

**Try it free at smokeladder.com**


CITE THIS STUDY

SmokeLadder (November 2026). Shifting Landscapes: The Positioning and Messaging Volatility Study. How often 300 software brands changed their homepage positioning and messaging in 30 nights. https://smokeladder.com/research/