Yarnit Retail AI Visibility Study | *Fall 2026*

An audit of 56 consumer brands across 1,100 answers from the two largest AI assistants.



THE STUDY AT A GLANCE

56	7	550	1,100	2
consumer brands audited	retail segments	shopper questions	AI answers recorded	engines: ChatGPT and Gemini

THE 56 BRANDS, BY AI VISIBILITY ARCHETYPE



Category definers 12 · Recognised, not referred 6 · Niche specialists 10 · Peripheral 10 · Absent 18

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A Method, glossary and sources

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Fieldwork August to October 2026 **Published** October 2026

1 Context and approach

How AI is changing product discovery, what this study set out to answer, and where shoppers stand today.

1.1 Abstract

Digital product discovery is moving from search results to AI answers, and from AI answers to shopping agents. The three modes overlap, and many shoppers now use more than one within a single purchase. Most shoppers who use AI today sit in the middle: they describe what they need and the assistant returns a shortlist with reasons. The third mode is being built now. Within the past year every major AI platform has added a way to buy without leaving the conversation.

Each step moves the point of decision further from the brand. In search, the decision formed on the brand or retailer site after the click. In an answer engine it forms inside the answer, before any click, and in an agent it can form with no click at all. Brands now compete to be named, described accurately and cited, and next to be selected and bought by software acting for the shopper.

EXHIBIT 1

Product discovery is moving through three modes, each moving the decision further upstream

WHERE THE DECISION FORMS — After the click — Before any click — Sometimes no click at all

	ESTABLISHED Search	WHERE MOST AI SHOPPERS ARE TODAY Answer engines	BEING BUILT NOW Shopping agents
WHAT THE SHOPPER DOES	Types keywords, filters results, opens tabs and compares	Asks in plain language, with context: budget, use, constraints	Delegates a task: find, compare and buy within set limits
WHAT THE PLATFORM DOES	Ranks pages	Reads across sources and returns a shortlist with reasons	Compares options, checks price and availability, completes checkout
WHAT A BRAND COMPETES FOR	Ranking and the click	**Being named, described accurately and cited**	Being selected, and being purchasable by the agent
WHAT THE BRAND MUST SUPPLY	Pages that rank	Product facts the engine can state and trust	Machine-readable catalog, pricing, inventory and policies, delivered through protocol feeds

Source: Yarnit analysis. This study measures the middle column.

This study measures where brands stand in the middle mode. Between August and October 2026, Yarnit put 550 shopper questions about 56 consumer brands to ChatGPT and Gemini, and recorded for each of the 1,100 answers whether the brand was named and whether its own website was cited. The

engines named the brand in 28% of answers and linked to it in 11%. The most visible brands were those an engine could describe in a few words. The questions shoppers ask first, about what to look for, were the ones brands were most often missing from.

1.2 About this study

Yarnit helps brands compete in agentic commerce: making their products discoverable, accurately described and purchasable when AI assistants and agents find, compare and buy on a shopper's behalf. That work needs an evidence-based view of where brands stand today, so we built one.

Between August and October 2026 we audited 56 consumer brands across seven segments. For each brand we put the same set of shopper questions to ChatGPT and Gemini, the two AI platforms with the largest reported audiences, and recorded whether each answer named the brand and whether it linked to the brand's website. The audited brands are not named in this paper. The study set out to answer five questions.

EXHIBIT 2

Five research questions, and where each is answered

Q1	Q2	Q3	Q4	Q5
QUESTIONS	**PLATFORMS**	**BRANDS**	**CATEGORIES**	**GAPS**
What do shoppers ask AI assistants in each category, and which questions bring brands into the answer?	Do ChatGPT and Gemini answer the same shopping question in the same way?	Which brands are most visible in AI answers, and what do they have in common?	How do AI answers differ from one category to another?	Which questions are brands missing from?
Answered in **3.3**	Answered in **3.6**	Answered in **3.1 and 3.2**	Answered in **3.4 and Section 4**	Answered in **3.5 and Section 5**

THE SAMPLE: 56 BRANDS BY SEGMENT



Apparel and footwear **15** · Beauty and personal care **11** · Pet **9** · Home and outdoor **8** · Jewelry **6** · Accessories **5** · Food and wellness **2**

Source: Yarnit AI visibility audits, 56 brands, August to October 2026.

1.3 Which AI platforms shape shopping

Five general-purpose AI platforms now sit between shoppers and products, and each is building its own route from question to purchase. The direction is the same everywhere: the assistant answers the question, assembles the shortlist and, more and more often, closes the sale. This study measures ChatGPT and Gemini, the two with the largest reported audiences.

EXHIBIT 3

In five months, checkout moved inside four of the five major assistants

SEP 2025
ChatGPT launches Instant Checkout for selected US merchants

NOV 2025
Perplexity launches Instant Buy for US users, with PayPal

JAN 2026
Microsoft launches Copilot Checkout in the US; Etsy sellers first

JAN 2026
Google announces checkout in AI Mode and Gemini, with Walmart, Target and Shopify first

MEASURED IN THIS STUDY

ChatGPT

OpenAI

REPORTED REACH

800M+

weekly users, October 2025

Product recommendations in conversation; Instant Checkout for selected US merchants.

Rails: Agentic Commerce Protocol, built with Stripe and open-sourced

MEASURED IN THIS STUDY

Gemini and AI Mode

Google

REPORTED REACH

950M+

monthly Gemini app users; AI Mode 1B+ users, Q2 2026

Shopping answers in Search and Gemini; checkout inside AI Mode and Gemini.

Rails: Universal Commerce Protocol, built with Shopify, Etsy, Walmart and Target; endorsed by 20+ companies

NOT MEASURED

Perplexity

Perplexity AI

REPORTED REACH

Not disclosed

Shopping answers; Instant Buy with merchants including Abercrombie & Fitch, Ashley and Newegg.

Rails: PayPal

NOT MEASURED

Copilot

Microsoft

REPORTED REACH

Not disclosed

Copilot Checkout; Shopify merchants enrolled by default with an opt-out.

Rails: PayPal, Shopify and Stripe

NOT MEASURED

Claude

Anthropic

REPORTED REACH

Not disclosed

Used for product research and comparison; Claude in Chrome can navigate and act on websites for the user.

Rails: existing retailer and brand websites

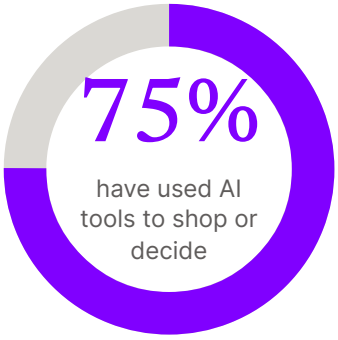
Sources: TechCrunch (Oct 2025; Jul 2026); Digital Commerce 360 (Feb 2026); eMarketer (Jan 2026); eWeek (Nov 2025); GeekWire (Jan 2026). Reach figures use each company's own unit and are not directly comparable.

1.4 How shoppers use AI assistants to shop in 2026

EXHIBIT 4

Three in four shoppers have already used AI in a purchase decision

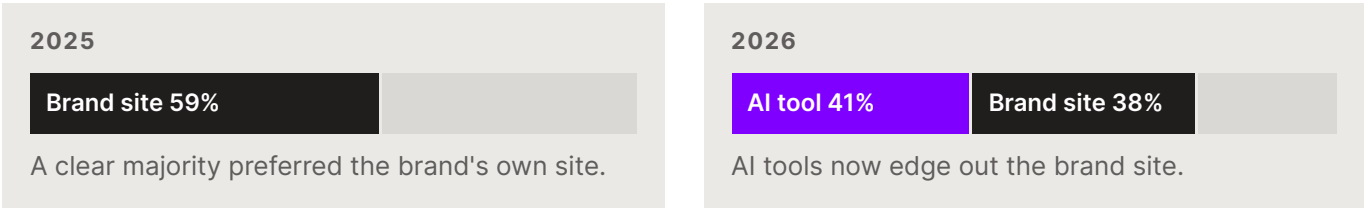
Survey of 4,040 adults in the US and UK, May 2026



WHAT THEY USED IT FOR



WHERE THEY WOULD RATHER SHOP, IF ASKED TO CHOOSE



Source: Bloomreach, From novelty to necessity: consumer survey, May 2026. Use cases are not exclusive, so shares sum to more than 100%. Grey segments are the share not reported.

Most shoppers have already used AI in a purchase. Three in four said they had used tools such as ChatGPT, Gemini or Claude for shopping or purchase decisions, most often to compare features or prices, find deals or look for ideas. The preference question shows how fast this has moved: a year ago most shoppers wanted to buy on the brand's site, and now slightly more would rather shop through an AI tool.

1.5 Why AI visibility matters for brands now

CONSEQUENCE ONE

The consideration set forms upstream

A brand that is missing from the answer is missing from the decision, whatever its search ranking.

CONSEQUENCE TWO

An engine can only recommend what it can state

What a product is, who it suits and why it is different must be explicit, consistent and machine-readable wherever the product appears: on the brand's site, in its feeds and on every retailer listing.

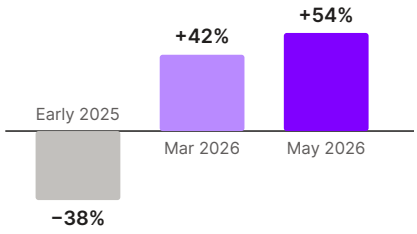
1.6 The state of AI shopping

AI-referred traffic is small, growing fast and converting

+393%

AI traffic to US retail sites, year on year, Q1 2026

CONVERSION VS OTHER TRAFFIC



By May 2026 AI-referred retail traffic was up 138% year on year. Shoppers arriving from an AI answer appear to have done much of their deciding already.

Sources: Adobe, Apr 2026; Digital Commerce 360 reporting Adobe data, Jun 2026.

Shoppers let AI decide before they let it pay

78% used AI for a shopping decision in the past six months

2% completed a purchase inside an AI tool

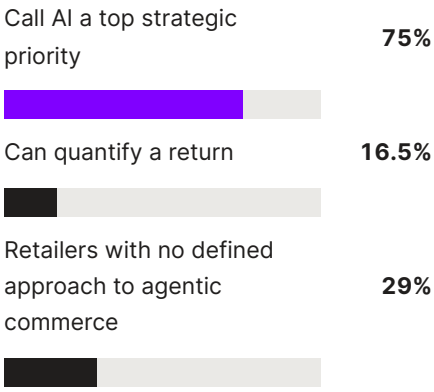
31% would not let an agent spend anything on its own

The gap between 78% and 2% is the distance between consideration and transaction. Shoppers have let AI into the decision. They have not yet handed it the card.

Source: Exploding Topics survey of 1,009 US consumers, April 2026, reported by TechWyse.

Retailers are investing ahead of a clear strategy

RETAIL AND CPG EXECUTIVES, 2026



McKinsey's survey of 114 merchants found 71% saying AI merchandising tools had so far had limited or no impact, citing fragmented systems and messy data. At Shoptalk in Nashville this autumn, retailers no longer needed convincing that AI mattered. Several described traditional search softening while overall traffic held, as if part of discovery had moved somewhere they could not see.

Sources: Deloitte survey of 200 executives, Jun 2026; McKinsey, Dec 2025 survey published Jan 2026.

THE PATTERN SO FAR

The decision has moved into the answer faster than the transaction has moved into the agent. Shoppers consider in ChatGPT or Gemini and still mostly check out on the brand's or retailer's site. How far delegation goes will depend on the category: a shopper may hand an agent the detergent reorder long before the choice of a sofa or a wedding outfit, where touching, trying and browsing are part of what they are paying for.

Executive summary

2 Seven findings from 1,100 answers by ChatGPT and Gemini to shopping questions about 56 consumer brands, each tied to the research question it answers.

"The brand studied" means the brand whose shopper questions were being asked. Across the sample, ChatGPT and Gemini mostly answered without it. The brands that did appear tended to be the ones an engine could sum up in a phrase, and they appeared late in the shopper's journey, once the criteria for choosing had already been set by someone else.

The implication runs through every finding below. AI visibility is a product-information discipline before it is a marketing one. The engines name brands they can describe, so the work is to make every product's identity, suitability and evidence stateable, then to measure continuously which questions a brand is part of.

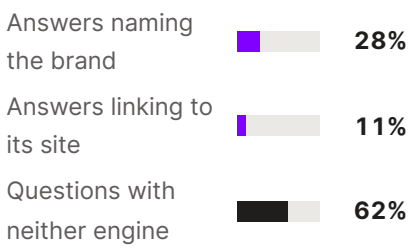
2.1 Seven key findings on brand visibility in AI shopping answers

1

Q3 · WHICH BRANDS ARE VISIBLE

Most AI shopping answers leave out the brand being studied

The engines named the brand in 28% of answers and linked to its website in 11%. On 62% of questions neither engine named it at all. A brand that is missing from the answer is missing from the shortlist the shopper acts on.

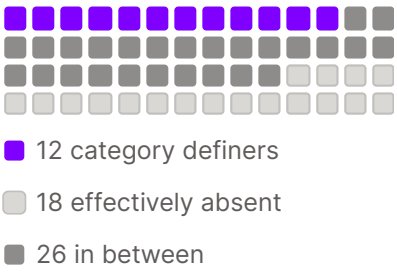


2

Q3 · WHAT VISIBLE BRANDS SHARE

Engines favour brands they can describe in a few words

Twelve of the 56 brands were named in at least 30% of answers, with a link to their site in at least 30% of those mentions. Most are synonymous with one product type, such as washable rugs or insulated drinkware. Eighteen brands appeared in fewer than one answer in ten, several of them well-established names.

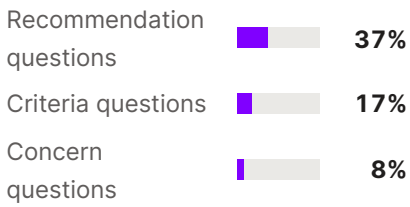


3

Q1 · WHAT SHOPPERS ASK

Brands go missing early, while shoppers learn what to look for

On selection-criteria questions, such as what makes a sweater last or which metals suit sensitive skin, neither engine named the brand 76% of the time. On direct recommendation questions the brand was named in 37% of answers. The criteria shoppers pick up early decide which products make the shortlist later.

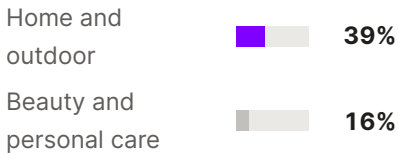


4

Q4 · HOW CATEGORIES DIFFER

Most categories already have a default brand, and segments differ widely

In seven categories a single brand appeared in at least half of the answers. Asked for alternatives to Lululemon, the engines still named Lululemon. Across segments, home and outdoor brands were named in 39% of answers and beauty and personal care brands in 16%.



5

Q5 · WHERE THE GAPS ARE

Questions that state a specific need give other brands a way in

Broad questions tend to go to established names. When the shopper adds a need, the answer can go to whichever brand has stated that product fact clearly. In our sample, an eyeliner brand absent from the broad answer was cited by ChatGPT for the specific one.

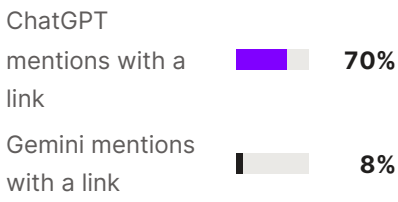


6

Q2 · HOW PLATFORMS DIFFER

ChatGPT and Gemini behave like two different channels

Both named the brands studied about equally often. ChatGPT linked to the brand's website in 70% of its mentions; Gemini did so in 8%. On more than half of the questions where a brand appeared, only one of the two engines named it.

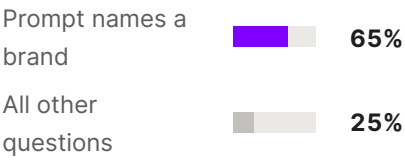


7

MEASUREMENT

The wording of a question changes a brand's AI visibility score

When the prompt itself named a brand, as in "best alternatives to X", the brand studied was named in 65% of answers, against 25% for all other questions. AI visibility scores should report branded and unbranded questions separately, and this paper's comparisons use unbranded questions only.



3 The seven findings in detail

The evidence behind each finding. How we measured is set out in Appendix A.

3.1 Seven in ten AI shopping answers do not mention the brand being researched

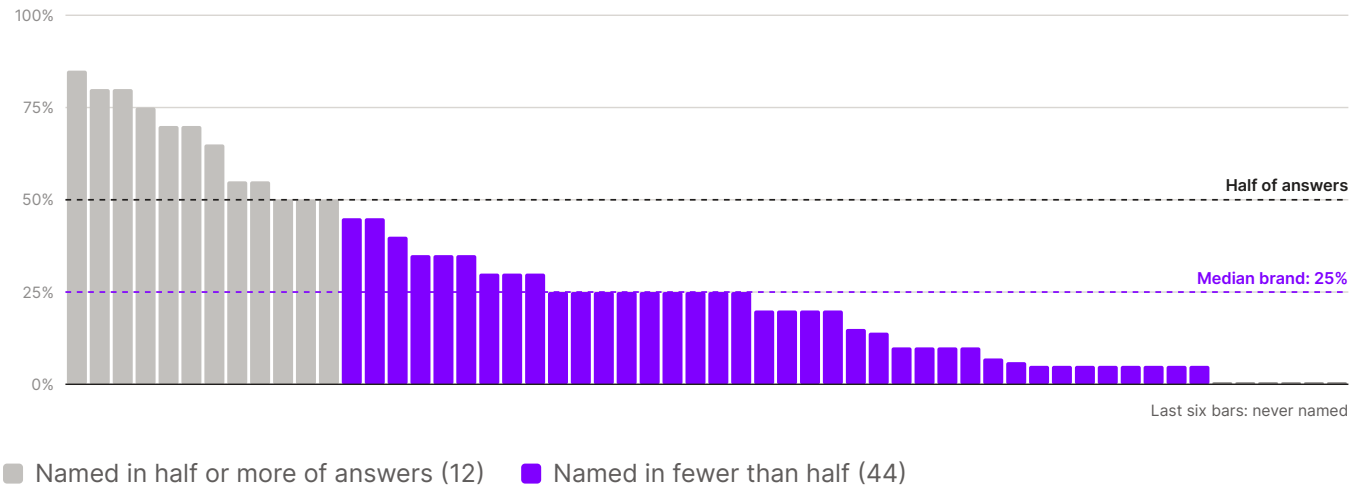
ANSWERS Q3 · WHICH BRANDS ARE MOST VISIBLE

28%	11%	62%	25%
of answers named the audited brand	cited the brand's own website	of questions: neither engine mentioned the brand	presence for the median brand

EXHIBIT 5

44 of 56 brands appear in fewer than half of their AI answers

Share of each brand's ChatGPT and Gemini answers that named it. Each bar is one audited brand, most to least visible.



Source: Yarnit AI visibility audits, 56 brands, ChatGPT and Gemini, Aug to Oct 2026.

The spread is wide. Seven brands appeared in 65% or more of their answers. Fourteen appeared in 5% or fewer, and six never appeared. Most of the brands at the bottom are established names in their categories.

AI-referred shoppers appear to arrive having done more of their deciding (see 1.6). A brand absent from 72% of answers is absent from most of that deciding.

> Being known to shoppers and being known to the engine turned out to be different things.

3.2 AI engines favour brands they can describe in a few words

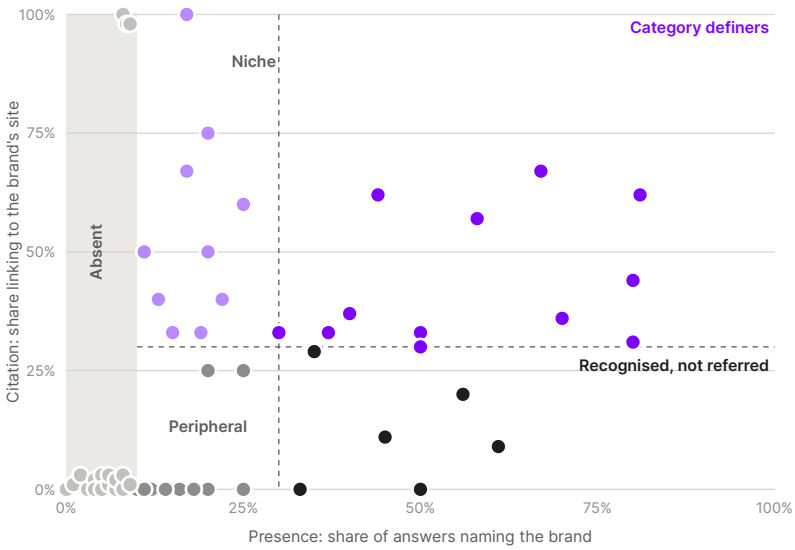
ANSWERS Q3 · WHAT VISIBLE BRANDS HAVE IN COMMON

Two measures separate the brands: how often an engine names them, and how often it sends the shopper to the brand's own site when it does. Plotting the 56 brands on both gives five archetypes.

EXHIBIT 6

Twelve brands are category definers; eighteen are effectively absent

Each dot is one brand. Unbranded questions only.



- Category definers **12**
- Recognised, not referred **6**
- Niche specialists **10**
- Peripheral **10**
- Absent **18**

HOW TO READ IT

Further right means named more often. Higher means the engine linked to the brand's site when it named it. Thresholds sit at 10% and 30% presence and 30% citation.

Source: Yarnit AI visibility audits, 56 brands, unbranded questions only, Aug to Oct 2026. Thresholds as defined in Appendix A.

EXHIBIT 7

Five archetypes of AI visibility, and what each should prioritise



ARCHETYPE	RULE	WHAT IT TYPICALLY LOOKS LIKE	PRIORITY
Category definers 12 brands	Named in 30%+; site cited in 30%+ of those	Synonymous with one product type: washable rugs, insulated drinkware, online prescription eyewear, wool shoes, folding tables, downriggers.	Defend the definition; extend into need-specific questions
Recognised, not referred 6 brands	Named in 30%+; site rarely cited	Named often but rarely linked: carry-on luggage, sustainable fashion, fine jewelry.	Make the brand's own pages the best source on its products

Niche specialists 10 brands	Named in 10 to 30%; cited when named	Win specific questions ("human-grade food for senior dogs", "athletic shorts with liner") and few others.	Widen the set of needs the brand is the answer to
Peripheral 10 brands	Named in 10 to 30%; rarely cited	Occasional mentions, rarely with a link. Half of them are in beauty.	Establish what the brand is for before anything else
Absent 18 brands	Named in under 10%	Lifestyle apparel, multi-brand and specialist retailers, demi-fine jewelry and several beauty brands.	Build the product facts the engine can attach the brand to

Source: Yarnit AI visibility audits, Aug to Oct 2026. Thresholds are ours; Appendix A gives the rules. Recognition does not appear to predict the archetype. Several absent brands are well-established names in their categories. What the definers share is that an engine can say what they are in a few words. Ask for "the best washable rug" and the engine has an obvious answer. Ask what makes a t-shirt soft and there is no brand-shaped answer at all, so the engine explains fabric instead.

No beauty brand reached the definer group, and five of the eleven beauty brands were peripheral. Pet had no absent brands but four niche specialists, which fits a segment where shoppers ask many specific questions.

USED, BUT NEVER CREDITED

One jewelry brand's website was used as a background source in two Gemini answers, yet the brand never appeared in the text the shopper saw. Being a source and being the answer are different outcomes.

3.3 Brands disappear from AI answers early in the buying journey

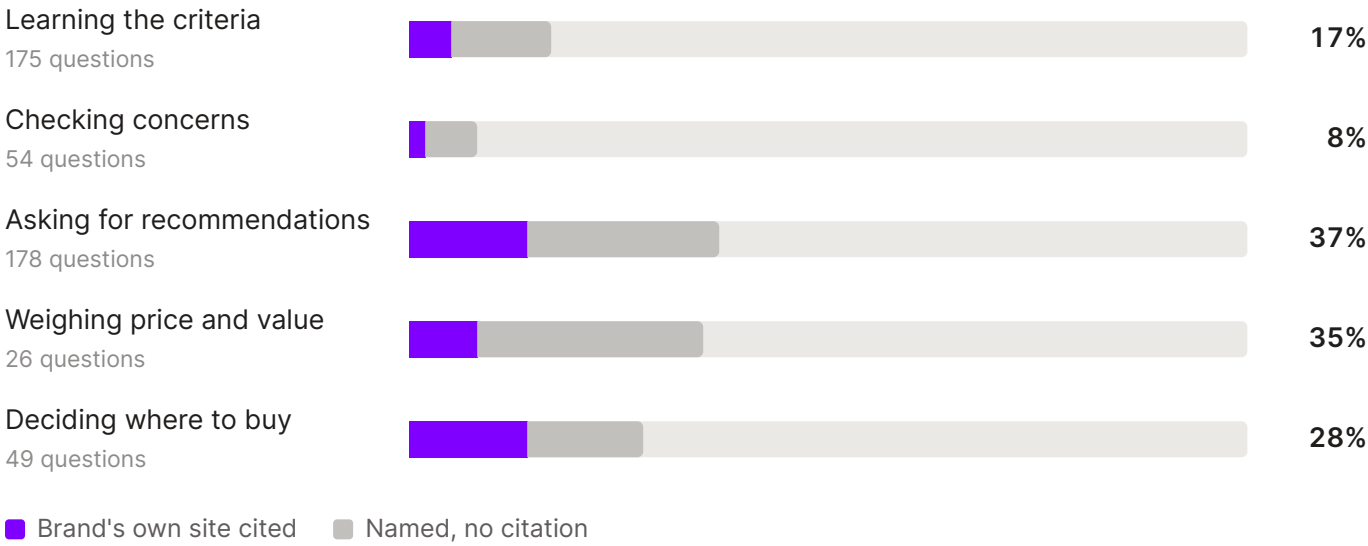
ANSWERS Q1 · WHAT SHOPPERS ASK, AND WHICH QUESTIONS BRING BRANDS IN

We grouped every core question by the stage of the decision it represents: learning the criteria, checking concerns, asking for a recommendation, weighing price and value, and deciding where to buy. Brands were named most often at the recommendation and value stages, and least often while the shopper was still working out what to look for.

EXHIBIT 8

Brands are named in 37% of recommendation answers, but 8 to 17% early in the decision

Share of answers naming the audited brand, by what the shopper was asking. Core set.



Source: Yarnit AI visibility audits, core set (Appendix A), Aug to Oct 2026. Excludes questions that named a brand in the prompt or did not describe a real shopping need. Cited shares are read from the original exhibit.

The low numbers sit at the start of the decision. When a shopper asks what makes a sweater last, which metals suit sensitive skin or what to avoid in a sunscreen, the engine answers with criteria, and the criteria are attributed to no one. On 76% of criteria questions, neither engine named the audited brand. Those criteria then decide which products make the shortlist a few questions later.

76%

of criteria questions had the brand absent from both engines

2 of 108

answers about concerns and complaints cited the brand's own site

Citation is thinnest where trust is formed. The pattern holds across segments, with differences in degree.

EXHIBIT 9

Concern questions barely name brands; beauty is near-empty outside recommendations

Share of answers naming the audited brand, by segment and question stage. Darker means more often named. Core set.

	Criteria	Concerns	Recommendation	Price and value	Where to buy
Home and outdoor	17% n=6	31% n=8	47% n=35	n=4	35% n=10
Accessories	38% n=25	n=1	39% n=19	n=1	n=1
Apparel and footwear	12% n=52	3% n=16	33% n=47	39% n=9	50% n=12
Pet	26% n=31	5% n=11	37% n=27	n=3	14% n=7
Jewelry	20% n=23	n=4	32% n=14	n=3	28% n=9
Beauty and personal care	4% n=28	4% n=12	31% n=32	30% n=5	5% n=10
Food and wellness	5% n=10	n=2	n=4	n=1	n=0

Source: Yarnit AI visibility audits, core set (Appendix A), Aug to Oct 2026. n = questions. Cells with fewer than five questions are not reported.

Accessories brands were named in 38% of criteria answers, largely because one eyewear brand was named, and often cited, on questions about lens coatings and other lens features. Pet brands reached 26% on criteria, helped by definitions of terms like "fresh" and "gently cooked". Beauty brands were named in 4% of criteria answers and 5% of where-to-buy answers. In beauty, the brand is mostly absent until the shopper asks for a product by name or type.

3.4 In most categories, AI engines default to one leading brand

ANSWERS Q4 · HOW CATEGORIES ARE ANSWERED DIFFERENTLY

The engines did not spread their recommendations evenly. In seven categories, one brand appeared in half or more of the answers, and challengers appeared beside it rather than in its place.

EXHIBIT 10

In seven categories, one brand appears in half or more of the answers

Each dot is one answer (or question, where the audit counted questions). Filled dots named the default brand.

Women's activewear **Lululemon**		**8 of 10** questions. Including the question asking for **alternatives to Lululemon**
Luggage **Travelpro**		**13 of 20** answers.
Western boots **Ariat**		**12 of 20** answers. Including **every answer** that named the challenger brand
Pet supplements **Zesty Paws**		**12 of 20** answers.
Insulated drinkware **Stanley**		**11 of 20** answers. Usually alongside the category leader
Men's shirts and trousers **Bonobos**		**10 of 20** answers.
Fishing gear retail **Bass Pro Shops**		**5 of 10** questions. Including **every where-to-buy answer** from ChatGPT

Source: Yarnit AI visibility audits, Aug to Oct 2026. Counts are as recorded in each audit; some audits counted questions and others answers. Default names listed only where they were not themselves named in most of the prompts.

> Asked for alternatives to Lululemon, the engines still named Lululemon.
>
> The default survives questions designed to displace it.

Some challengers exist in the answers only next to the default.

Demi-fine jewelry brand + **Mejuri**

Never appeared without Mejuri.

Fresh dog food brand + **Category leader**

Never appeared without its category's best-known subscription service.

Western boot brand + **Ariat**

Appeared in six of ten questions, and Ariat was named in every answer that named it.

The useful question for a challenger is whether it exists in the answer independently of the brand it is compared with. A brand that appears only as an alternative is being defined by someone else's position.

The default can also be a retailer. In fishing gear, ChatGPT named the same retailer in every where-to-buy answer it gave. The three multi-brand retailers we audited, in fashion, fishing gear and footwear, were each named in about 5% of their answers. For fashion the engines named the labels instead, and the footwear retailer never appeared in an answer without Ugg. Three cases are too few for a rule, but they fit a concern we heard at Shoptalk: when the agent does the aggregating, being the place with everything counts for less.

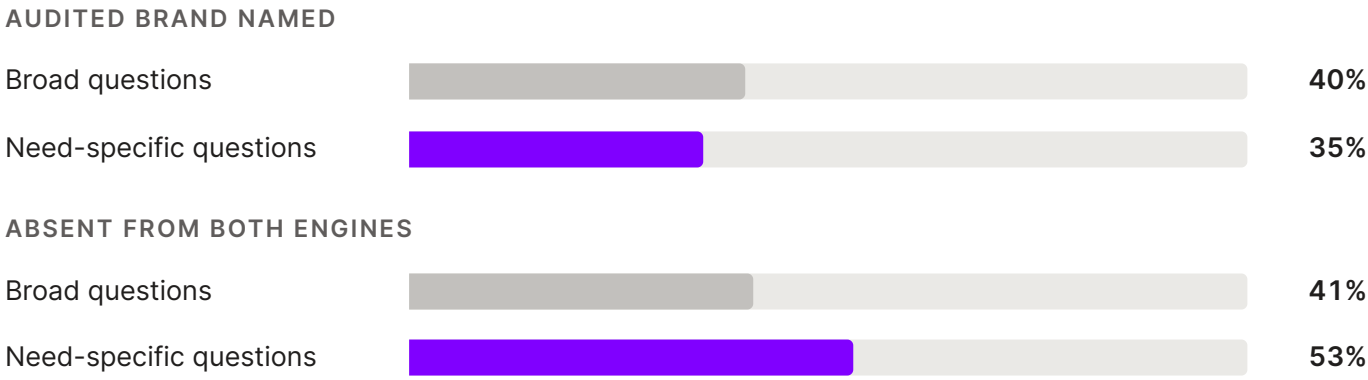
3.5 Need-specific questions reopen AI answers to brands that state the relevant facts

ANSWERS Q5 · WHERE THE GAPS ARE

Broad recommendation questions, such as "best washable rugs" or "best body oils", favour brands that are already established. Questions that state a need are less settled.

EXHIBIT 11

Adding a need lowers average presence and leaves more answers unclaimed



Source: Yarnit AI visibility audits, recommendation questions in the core set, Aug to Oct 2026.

At first sight that is a loss. The question-level evidence shows where it turns into an opening.

EXHIBIT 12

A stated need can bring a brand into the answer

EYELINER BRAND		
ABSENT FROM BOTH Best waterproof gel eyeliner	→	CITED BY CHATGPT ...for mature eyes

PERFORMANCE APPAREL BRAND		
ABSENT FROM BOTH Best men's athletic shorts with zipper pockets	→	CITED BY CHATGPT, NAMED BY GEMINI ...with liner

CLEAN BEAUTY BRAND		
ABSENT FROM BOTH Best lip gloss that isn't sticky	→	CITED BY CHATGPT, NAMED BY GEMINI Long-wear eyeshadow sticks for sensitive eyes

WESTERN BOOT BRAND		
ABSENT FROM BOTH Durable work boots for construction	→	CITED BY CHATGPT, NAMED BY GEMINI Cowboy boots for women with wide calves

Source: Yarnit AI visibility audits, Aug to Oct 2026. Questions paraphrased from the audit question sets.

The default brand holds the broad question. The specific question goes to whichever brand has stated the relevant fact clearly enough for the engine to use: the fit, the formulation, the use condition. The same brand can win one variant and lose the next, as the shorts example shows.

This matters more as shopping becomes conversational. A shopper who describes their situation to an assistant (a heavy runner with wide feet, a budget, a delivery date) asks a need-specific question every time.

3.6 ChatGPT links to brand websites far more often than Gemini, and the two often disagree

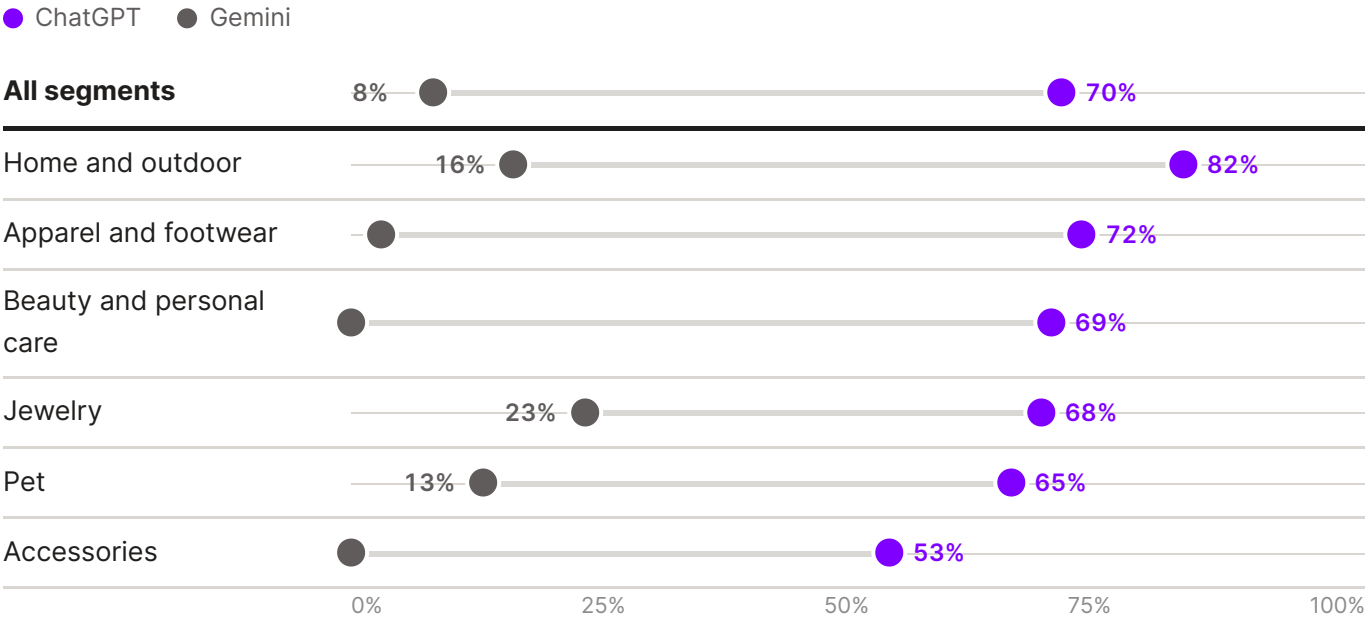
ANSWERS Q2 · HOW DIFFERENT PLATFORMS ANSWER THE SAME QUESTION

150	157	105	13
ChatGPT answers named an audited brand	Gemini answers named an audited brand	of ChatGPT's mentions linked to the brand's site (70%)	of Gemini's mentions did (8%)

EXHIBIT 13

When ChatGPT names a brand it usually links to the brand's site; Gemini rarely does

Of the answers that named the audited brand, share that cited the brand's own website. All answers.



Source: Yarnit AI visibility audits, all answers, Aug to Oct 2026. Food and wellness is included in the total only. Gemini values for apparel, beauty and accessories are near zero.

The gap holds in every segment. For a brand it is the difference between a referral and an impression: a ChatGPT mention usually carries a route to the brand's page, and a Gemini mention usually does not.

EXHIBIT 14

On more than half the questions where a brand appeared, only one engine named it

The 210 questions on which at least one engine named the audited brand



Source: Yarnit AI visibility audits, Aug to Oct 2026.

A brand's presence often depended on which engine the shopper happened to use, so visibility has to be measured per engine. The work to improve it may differ too. Being the clearest source matters most where the engine links. Being clearly associated with the product type matters most where it does not.

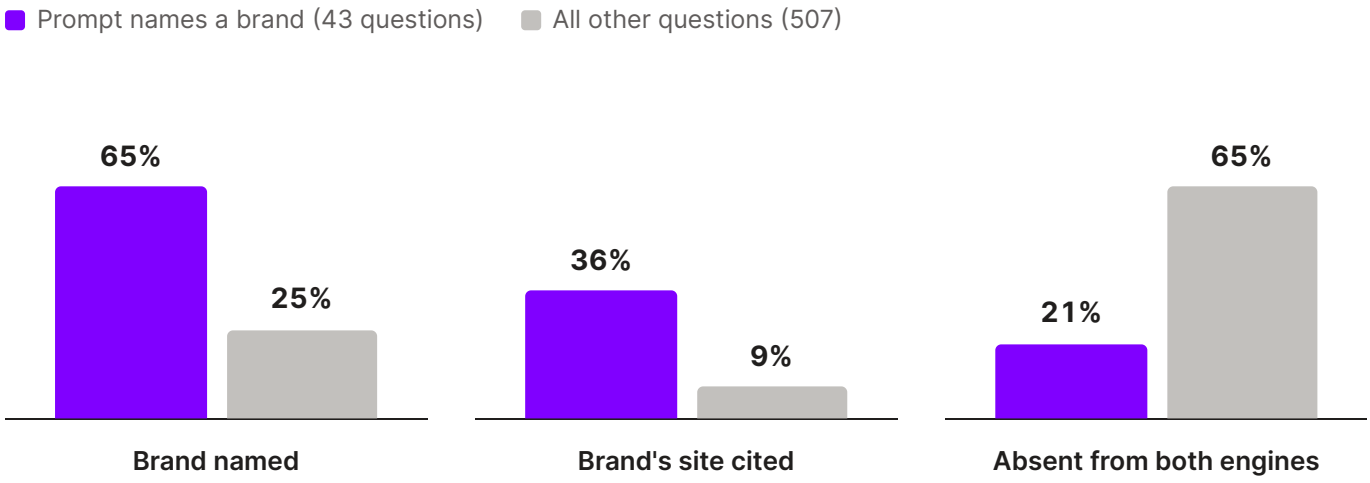
3.7 The wording of a question changes a brand's AI visibility score

A LESSON ABOUT MEASUREMENT

Forty-three questions in the sample named a brand in the prompt, such as "best alternatives to X" or "how does X compare with Y". Those prompts behaved very differently from the rest.

EXHIBIT 15

Naming a brand in the prompt more than doubles the audited brand's presence



Source: Yarnit AI visibility audits, Aug to Oct 2026; all 550 questions.

13

brands owed 40% or more of their measured visibility to branded prompts

2

brands appeared nowhere else

We include this finding because it applies to every AI visibility score, our own included. A visibility score is a property of a brand and a question set. Questions that name a rival, repeat the brand's own claims or describe needs no shopper has will move the score without moving the market. Three practices follow. The rest of this paper's comparisons use a core set that excludes branded prompts (Appendix A).

Split the score

Report branded and unbranded questions separately.

Ask what shoppers ask

Build question sets from evidence such as site search, customer service logs and search data, not from the brand's positioning.

Hold the baseline

Keep a fixed question set and re-run it, so a change in the score reflects a change in the engines, not in the questions.

AI visibility by retail category

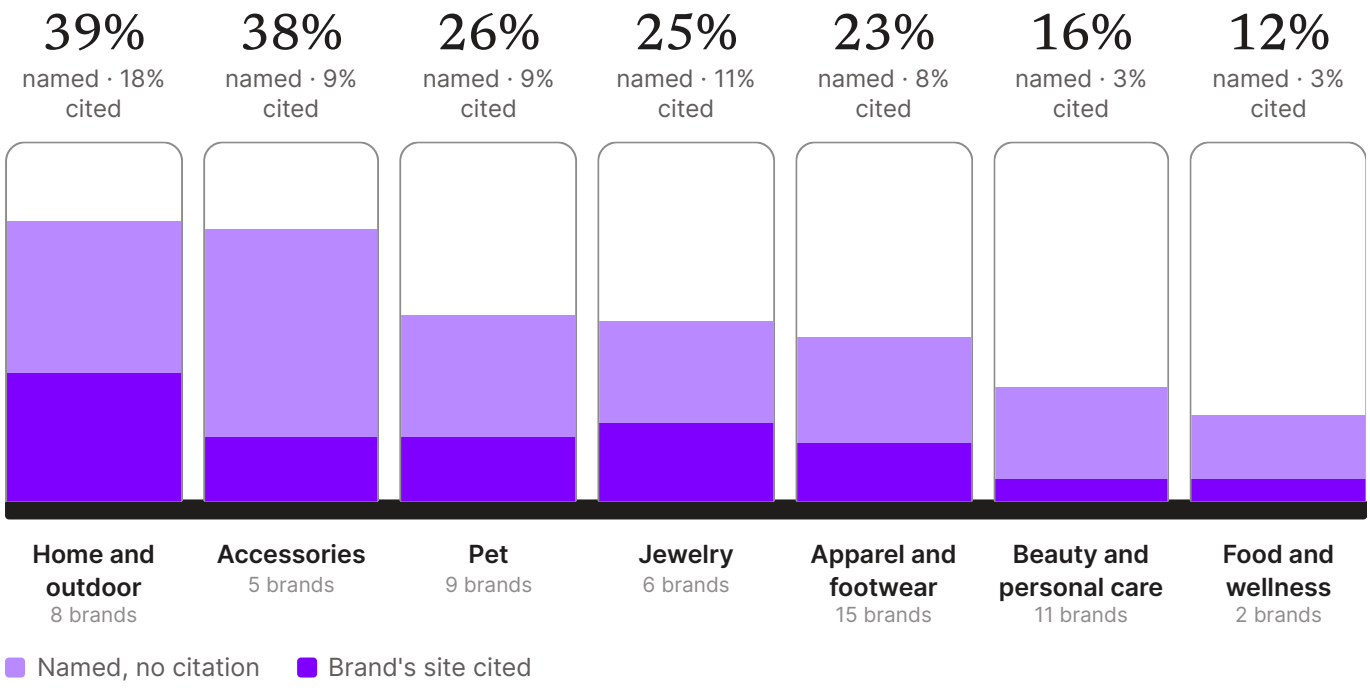
4

Home and outdoor brands were the most visible and the most often cited. Among the larger segments, beauty brands were the least visible on every measure.

EXHIBIT 16

The segment shelf: how often each segment's brands were named, and how often linked

Fill height is the share of answers naming the audited brand; the darker base is the share citing the brand's own site.



Source: Yarnit AI visibility audits, core set, Aug to Oct 2026. Food and wellness has two brands and is indicative only.

EXHIBIT 17

Segment scorecard

SEGMENT	BRAND NAMED	SITE CITED	ABSENT FROM BOTH	DEFINERS	ABSENT BRANDS	COMPETITORS THE ENGINES NAMED MOST
Home and outdoor 8 brands	39%	18%	51%	●●●●	●●●	Stanley, RTIC, Rugs USA, Bass Pro Shops
Accessories 5 brands	38%	9%	55%	●●	●	Travelpro, Zenni Optical, Hobo
Pet 9 brands	26%	9%	61%	●	None	Zesty Paws, Nom Nom, JustFoodForDogs

SEGMENT	BRAND NAMED	SITE CITED	ABSENT FROM BOTH	DEFINERS	ABSENT BRANDS	COMPETITORS THE ENGINES NAMED MOST
Jewelry 6 brands	25%	11%	64%			Mejuri, Blue Nile, James Allen
Apparel and footwear 15 brands	23%	8%	68%			Lululemon, Bonobos, Ariat, Ugg, HOKA
Beauty and personal care 11 brands	16%	3%	74%	None		Fenty Beauty, Maybelline, EltaMD, Colorescience
Food and wellness 2 brands	12%	3%	76%	None		Chip City, Last Crumb

Source: Yarnit AI visibility audits, Aug to Oct 2026. Presence, citation and absence use the core set (Appendix A); archetypes as defined in 3.2. Named competitors are those the audits recorded in the answers; audited brands are not named.

4.1 What we saw in each segment

Home and outdoor 39%

The most visible segment

The segment with the most clearly defined product categories and the strongest results: the audited brand was named in 47% of recommendation answers, and 18% of all answers cited its site. Its gaps were in products the brands are less known for (swim trunks, wetsuits, shallow-water anchors), in team sports equipment, where a specialist brand was absent from every answer, and in specialist retail, where the engines defaulted to one large retailer.

4 definers **47%** on recommendations

Accessories 38%

Often named, rarely linked

Eyewear, luggage, bags and watches. Presence was relatively high, driven by an eyewear definer, a bag brand named on construction and organisation questions, and a luggage brand the engines named often but rarely cited. Citation was low at 9%: Gemini named accessories brands 22 times and cited none of them. The audited brands were absent from almost every travel bag and smartwatch question, and from handbag care and style questions.

0 of 22 Gemini mentions cited

Pet 26%

Visible on definitions, nearly absent on purchase and concerns

The most education-heavy segment. Shoppers ask what "human-grade", "fresh" and "gently cooked" mean, what vets recommend and what to avoid. Pet brands did comparatively well on these questions (26% presence), and the engines cited brand pages for definitions. No pet brand was absent, but four were niche specialists. Purchase questions were weak at 14%, and concerns questions almost empty (1 of 22 answers).

0 absent brands · **1 of 22** concern answers

Jewelry 25%

Fine jewelry treated as education; demi-fine clusters around one name

Two different markets. Fine jewelry questions were treated as education, and in one audit the engines named no competitor across ten questions. Demi-fine jewelry clusters around one default name, Mejuri. On material questions (plating, sterling silver, hypoallergenic metals, sensitive skin), the demi-fine brands were absent from every answer.

0 competitors named in one fine-jewelry audit

Apparel and footwear 23%

Named for products, absent on fit and fabric

The engines name apparel brands for products ("selvedge jeans", "wool running shoes", "cowboy boots for wide calves") and answer fit, fabric and care questions generically. Audited brands were named in 12% of answers about criteria such as fabric, fit and construction, the knowledge these brands hold in most depth. Where-to-buy questions were a relative strength at 50%. Seven of the fifteen brands were absent, the most of any segment; most are positioned on style rather than a defined product, and two are multi-brand retailers.

7 of 15 absent · **12%** on criteria

Beauty and personal care 16%

The least visible of the larger segments

One of two segments without a category definer. Audited beauty brands were named in 31% of recommendation answers, 4% of criteria answers and 1 of 20 where-to-buy answers. Questions turned on shade range, finish, wear, ingredients and skin-type suitability: mature eyes, sensitive skin, swimming, pregnancy-safe sunscreen. The engines often answered with ingredient guidance or with a handful of large brands. Five of the eleven beauty brands were peripheral.

0 definers · **5 of 11** peripheral

Food and wellness 12%

An early, indicative read (two brands)

A cookie bakery was named on gourmet-cookie and gifting questions, alongside Chip City and Last Crumb. A longevity nutrition brand was named once, on what to look for in a longevity program. The engines answered its other diet and health questions as clinical education, without naming any brand.

2 brands, indicative only

5 Where the gaps are

The shopper questions on which audited brands were absent from AI answers.

On almost two in three core questions, neither engine named the audited brand. Most of these questions are not obscure. They are what a careful shopper asks before deciding what to buy: what a term means, what to look for, what to avoid, how to care for it. In each case the engine still gives an answer; it simply attributes that answer to no one yet.

64%

of core questions had the brand absent from both ChatGPT and Gemini.

5.1 Three kinds of whitespace recur

76%

Criteria and definitions

On three in four criteria questions, neither engine named the audited brand. Whoever explains the criteria clearly, with evidence, is in a position to become the reference the engine draws on.

2 of 108

Concerns and checks

Answers about what to avoid, what customers complain about and what to check before buying almost never cited the brand's site. These questions decide whether a shopper trusts a category.

8

Categories without a default

In eight audits the engines named no competitor brand at all: fine jewelry, men's casual shirts, eyeliner, travel bags, soft basics, women's everyday apparel, longevity nutrition and wool footwear. Only the wool footwear brand had filled that space.

EXHIBIT 18

Shopper questions on which the audited brand was absent from both engines

BEAUTY AND PERSONAL CARE

- ? What should I avoid in facial skincare?
- ? How do I choose a sunscreen for sensitive skin?
- ? Which mineral sunscreens suit pregnancy and postpartum?
- ? What is the best lip gloss that isn't sticky?
- ? Where can I buy clean beauty products online?

APPAREL AND FOOTWEAR

- ? How can I identify a high-quality men's casual shirt?
- ? What should I look for in comfortable women's denim?
- ? What is the ideal inseam for men's athletic shorts?
- ? Which shoes are best for all-day standing?
- ? What should I avoid in women's dresses?

PET

- ? What does preservative-free dog food actually mean?
- ? Is grain-free food better for dogs with allergies?
- ? How do I move my dog to a new food?
- ? What should I avoid in dog treats?
- ? Where can I buy cat health supplements online?

JEWELRY

- ? How long does 18k gold plating last?
- ? What makes jewelry suitable for sensitive skin?
- ? What is the difference between solid gold and gold plated?
- ? How do I care for gold-plated jewelry?
- ? What should I look for in a diamond engagement ring?

ACCESSORIES

- ? What should I look for in lightweight luggage?
- ? How do I care for a leather handbag?
- ? Which smartwatches suit older adults who track activity?
- ? How do I make sure an online glasses prescription is accurate?

HOME AND OUTDOOR

- ? What should I check before buying baseball equipment?
- ? What do I need to start fly fishing?
- ? Which cleaning supplies are safe for natural materials?
- ? What do customers complain about after buying outdoor furniture?

FOOD AND WELLNESS

- ? What should I check before buying gourmet cookies?
- ? How can nutrition support healthy aging?
- ? What is medical nutrition therapy used for?

Source: Yarnit AI visibility audits, Aug to Oct 2026; core set. Wording lightly edited. The audits did not record every brand named per question, so these show where the audited brand was absent, not that no brand was named.

How brands can improve their AI visibility

6

The findings point to work that sits mostly with product, merchandising and ecommerce teams, with marketing alongside. These five actions make sense for any brand, however AI shopping develops.

1 Establish a baseline you can trust

Build a fixed set of unbranded questions per category from evidence of what shoppers ask: site search, customer service, reviews and search data. Run it on more than one engine, more than once, and record mentions, citations and the sources cited. Report branded and unbranded questions separately.

WHY IT MATTERS

ChatGPT and Gemini disagreed on more than half the questions where a brand appeared, and branded prompts more than doubled presence (3.6, 3.7).

2 Make every product stateable

For each priority product, the engine should be able to say in one sentence what it is, who it is for, what makes it different and what it costs. If that sentence cannot be written from the product page and feed today, the product is unlikely to be named.

WHY IT MATTERS

The twelve category definers are the brands an engine can describe in one product phrase (3.2).

3 Publish the criteria, with evidence

The least attributed answers were about selection criteria, definitions and concerns. Own them with fit and fabric guidance, ingredient and material explanations, care instructions and honest limitations. Tie each explanation to the products it applies to.

WHY IT MATTERS

On 76% of criteria questions the brand was absent from both engines; concern answers cited the brand's site twice in 108 (3.3).

4 Write for the specific need

Map the needs your products genuinely serve (mature skin, wide calves, sensitive eyes, small dogs) and state them as product attributes rather than campaign copy. This is where challengers can win answers that defaults currently hold.

WHY IT MATTERS

In each of the four question pairs in Exhibit 12, a stated need brought an absent brand into the answer (3.5).

5 Keep one version of the product truth

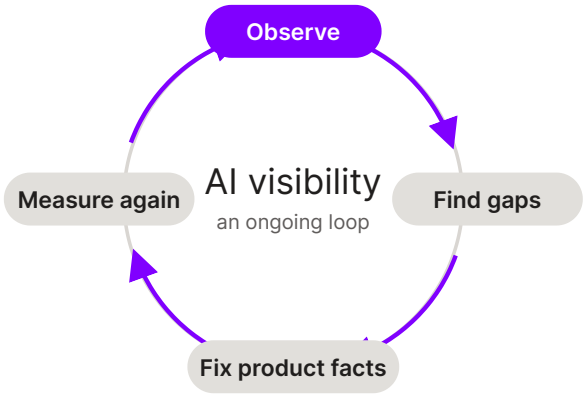
The same product should carry the same facts on your site, in your feeds and on every retailer and marketplace listing. Engines draw on all of them, and a missing or conflicting attribute gives them less to work with.

WHY IT MATTERS

Engines read across sources, and one brand's site was used as a source without the brand ever being named (3.2).

6.1 Why AI visibility needs continuous measurement

Models change, retrieval changes, competitors improve their data and new products arrive. A single audit is a baseline. The cycle that compounds is to observe how the engines understand you, find the gaps, fix the underlying product facts and measure again.



7 Frequently asked questions about AI shopping visibility

What is AI visibility for a brand?

AI visibility is how often an AI assistant names a brand, and links to the brand's website, when shoppers ask about the brand's category.
This study measures it as presence (the share of answers that name the brand) and citation (the share of answers that link to the brand's own site).

What is the difference between SEO, AEO and GEO?

SEO aims to rank pages in search results. AEO and GEO aim to get a brand named, described accurately and cited inside an AI-generated answer.
Search engine optimisation (SEO) targets a ranked list of links. Answer engine optimisation (AEO) and generative engine optimisation (GEO) target the written answers in tools such as ChatGPT, Gemini, Perplexity and Google's AI Mode. The two terms are often used interchangeably.

How often do ChatGPT and Gemini mention brands in shopping answers?

In 28% of answers, in Yarnit's 2026 study of 56 consumer brands.
Across 1,100 answers, ChatGPT and Gemini named the brand being researched in 28%. On 62% of the 550 questions, neither engine named it.

Which links to brand websites more often, ChatGPT or Gemini?

ChatGPT: 70% of its brand mentions included a link to the brand's site, against 8% for Gemini.
The engines also disagreed on where brands belonged. On more than half of the questions where a brand appeared, only one of the two engines named it.

Which retail categories are most visible in AI shopping answers?

Home and outdoor (brands named in 39% of answers), followed by accessories (38%).
Beauty and personal care (16%) and food and wellness (12%, two brands only) were the least visible.

Which shopping questions are brands most often missing from?

Questions asked early in the decision, about what to look for in a product.
On those questions neither engine named the audited brand 76% of the time. On questions about concerns and complaints, the brand's own site was cited in 2 of 108 answers.

Can shoppers buy products directly inside ChatGPT, Gemini, Perplexity or Copilot?

Yes, in the US, for participating merchants.
OpenAI launched Instant Checkout in ChatGPT in September 2025, Perplexity launched Instant Buy in November 2025, Microsoft launched Copilot Checkout in January 2026, and Google announced checkout in AI Mode and Gemini in January 2026. Use is still limited: in an April 2026 survey of 1,009 US consumers, 2% had completed a purchase inside an AI tool.

How can a brand improve its AI visibility?

Measure with a fixed set of unbranded questions, make every priority product describable in one sentence, and publish the criteria shoppers use.
The five actions in this study: measure visibility with a fixed set of unbranded shopper questions across more than one engine; make every priority product describable in one sentence; publish selection criteria, definitions and care guidance tied to specific products; state the specific needs each product serves as product attributes; and keep the same product facts on the brand's site, feeds and every retailer listing.

A Method, glossary and sources

For reference.

A.1 How the study was conducted

SAMPLE

AI visibility audits for 58 North American brands in two waves: 5 August to 8 September 2026, and 15 to 16 October 2026. Two audits were excluded (one used another brand's question set; one covered a B2B electrical manufacturer). The remaining 56 each asked 5 to 10 questions, 550 in total, of ChatGPT and Gemini once each: 1,100 answers.

CORE SET

Headline figures use all 1,100 answers. Segment and stage comparisons use 482 questions (964 answers), after removing 43 branded prompts and 29 questions that described no real shopping need; four fell into both groups.

LIMITS

Questions were written per brand for sales audits, so they reflect our test design rather than measured shopper demand, and carry no search volume. Each was asked once; run-to-run variation is not yet measured. Engine behaviour may have changed between the two waves. Competitor counts mix questions and answers. Presence is not endorsement, and accuracy was not scored. The study measures answers, not traffic or sales. Segment results describe these 56 brands only.

MEASURES

Presence: share of answers naming the brand. **Citation**: share linking to the brand's own site (a cited answer is also present). **Absent from both**: neither engine named the brand for that question. Competitor brands in each answer were also recorded. We name the brands the engines recommended, which are public outputs, but not the brands we audited.

QUESTION STAGES AND ARCHETYPES

Each core question was assigned one stage from its wording: criteria, concerns, recommendation, price and value, or where to buy. Archetypes use unbranded questions. Absent: under 10% presence. Definers: 30%+ presence and 30%+ citation of those. Recognised, not referred: 30%+ presence, under 30% citation. Niche specialists: 10 to 30% presence, 30%+ citation. Peripheral: 10 to 30% presence, under 30% citation.

SEGMENT	BRANDS	QUESTIONS	CATEGORIES COVERED
Apparel and footwear	15	150	Sustainable fashion, men's casual, women's apparel, activewear, intimates, preppy, footwear, western boots, multi-brand and footwear retail
Beauty and personal care	11	105	Cosmetics, skincare, clean and vegan beauty, sun care, body care and fragrance
Pet	9	85	Fresh, human-grade, air-dried and natural pet food; pet supplements
Home and outdoor	8	80	Rugs, household goods, drinkware, outdoor furniture, outdoor and watersports gear, team sports equipment, fishing retail
Jewelry	6	60	Fine, demi-fine and fashion jewelry

SEGMENT	BRANDS	QUESTIONS	CATEGORIES COVERED
Accessories	5	50	Eyewear, luggage, bags, watches and wearables
Food and wellness	2	20	Baked goods, nutrition programs
Total	**56**	**550**	

A.2 Glossary

Agentic commerce
Shopping in which an AI agent finds, compares and increasingly buys products for a shopper, within limits the shopper sets.

Answer engine
An AI system that answers with written text drawn from several sources rather than a ranked list of links, such as ChatGPT, Gemini, Perplexity, Copilot and Claude.

AEO and GEO
Answer and generative engine optimisation: making a brand's information easy for answer engines to find, state accurately and attribute.

AI visibility
How often an answer engine names a brand, and links to its website, in answers about the brand's category.

Presence (named)
Share of answers that mention the audited brand by name, with or without a link.

Citation (cited)
Share of answers that link to the audited brand's own website.

Absent from both
A question on which neither ChatGPT nor Gemini named the audited brand.

Branded prompt
A question that names a brand, such as "best alternatives to X".

Core set
The 482 questions used for most comparisons, excluding branded prompts and incoherent generated questions.

Category definer
A brand named in at least 30% of unbranded answers, with its site cited in at least 30% of those mentions.

Agentic Commerce Protocol (ACP)
An open protocol from OpenAI and Stripe that lets AI agents complete purchases with participating merchants.

Universal Commerce Protocol (UCP)
A protocol introduced by Google with retail partners for agent-led checkout across Google's AI surfaces.

A.3 Sources

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10. eWeek, PayPal and Perplexity launch Instant Buy, 26 November 2025.
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12. Bloomreach, From novelty to necessity: consumer survey, May 2026.
13. TechWyse, reporting Exploding Topics survey on AI shopping adoption, April 2026.



About Yarnit. Yarnit builds agentic AI for retail and commerce, including product information enrichment, AI discoverability and conversational selling. This study draws on the brand AI audits we run with retailers and brands.