



The AI Visibility Gap: How Generative AI is Redefining Brand Discovery

August 2026

EXECUTIVE SUMMARY

Why read this report?

Key findings

HOW AI IS CHANGING PRODUCT DISCOVERY

Discovery is shifting from open search to mediated choice

AI is small in traffic, but growth is outpacing traditional sources of referral

Shoppers are using Gen AI to gain clarity and confidence

Hence, AI has disproportionate influence at the moment of intent

EARLY DISRUPTION SIGNALS IN CONSUMER GOODS

The AI Choice Framework: How AI enters the shopper decision

Disruption varies by category and purchase situation

THE VISIBILITY GAP

AI visibility and its measurement are immediate challenges for brands

Measuring the disconnect between AI discovery and e-commerce performance is key

From measurement to strategy: The AI-Commerce Matrix

LEARNINGS FROM A DEEP DIVE INTO THE SKIN CARE CATEGORY

AI visibility is highly concentrated, leaving most skin care brands unseen

Algorithmic authority is creating a new competitive elite - only 161 brands qualify

The AI elite resolves into five recurring archetypes

Five brand archetypes, five routes to AI visibility

AI leaderboard for skin care is led by Derm-Science Giants and AI-Native Challengers

CeraVe translated dermatologist trust into algorithmic authority

AI-Native Challengers represent the largest archetype within the AI elite

The Ordinary's ingredient-first communication creates AI-native visibility

While AI discovery is rewarding some brands, it is exposing new vulnerabilities for others

Luxury is becoming AI's blind spot

The tale of two Asian brands: Same category, opposite AI outcomes

Brand-led content, third-party sources and the case of Amazon reviews

Strategic priorities of every brand archetype in skin care

STRATEGIC IMPLICATIONS FOR BRANDS

Three structural risks faced by brands

What does it take for brands to show up in AI-driven discovery?

Five immediate priorities for brands in the AI era

Evolution of AI-led product discovery

AI visibility will increasingly matter for both customer acquisition and retention

Questions we are asking

APPENDIX

What is an AI referral and how we track it?

List of markets for GenAI search study

Details of archetype: Breakdown

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