AI
Visibility
Index

How brands win visibility in AI search

SEMRUSH
An Adobe Company

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Chapter 1

Overview

Semrush and Adobe bring a combined perspective to this research, spanning brand visibility and customer experience. Together we provide the industry's most comprehensive solutions and insights to the thousands of businesses now navigating AI search.

About the 2026 AI Visibility Index

Your brand is experiencing a shift it can't afford to ignore. The systems shaping how you're described are harder to see, audit, or steer than the channels you already know. ChatGPT and Google's AI surfaces now sit between you and your customer at the moment of consideration, describing, comparing, and recommending your brand to hundreds of millions of people every week.

You may still be experimenting at the edges of AI visibility. That's no longer enough. What decides the outcome now is whether AI selects, interprets and frames your brand correctly when the conversation about it largely happens without you.

This demands a strategic, cross-functional response. Our data proves it.

We drew on Semrush's US AI search prompt database, which as of April 2026 holds 126 million real user prompts. Our analysis covers ChatGPT, Google Gemini, AI Mode and AI Overviews across 22 verticals, in the January to April 2026 window.

Shaped by Semrush's nearly two decades in search, this is one of the industry's largest studies of AI brand visibility. One built for your team to act on.

We're leading with the action. The playbook comes first, the analysis follows, then the category scorecards give you space to deep dive.

Notes from Adobe

Your AI narrative is becoming the decisive entry point to your customer experience. But the new reality is, your customers are both people and AI agents. Minimizing brand drift to ensure accuracy and consistency across every digital touchpoint is now the starting point for securing visibility. Reinforcing these messages through genuine brand engagement and customer trust determines which brand gets selected. This requires new content strategies, stronger data foundations, and organization-wide governance. We know our customers are up for the challenge.



Rachel Thornton
CMO, Adobe Enterprise

Google launching the Intelligent Search Box puts us at the event horizon. AI is now intrinsic to the default search experience and brands need to adapt. The name of the game is Brand Visibility. The foundations of SEO are critically important in creating trust signals for AI, and without consistently reinforcing your narrative across digital channels, you're still playing by yesterday's rules. Organizations need to redesign their marketing functions and drive this forward together to meet this challenge. This 2026 AI Visibility Index sets the baseline. The 2027 Index will measure who acted on it.



Andrew Warden
Vice President of Marketing at Adobe and former CMO of Semrush

Chapter 2

For the leader with 15 minutes, these findings matter most.

Executive Brief

We explore each insight below in detail later in the report. All are anchored to Semrush's US AI search prompt database, which held 126M unique prompts as of April 2026.

One principle underpins all ten. In AI search, mentions and citations are not the same thing: AI can describe your brand without quoting your site, and quote your site without naming your brand. This report measures both.

1 Mentions and citations are separate metrics

A brand can be mentioned often in AI answers and cited as a source almost nowhere. Or cited constantly and mentioned almost never. Mentions and citations are separate metrics, earned through separate mechanisms. Mentions come from brand authority and category fit. Citations come from content depth. The two don't always move together. Wikipedia is heavily cited but rarely the brand AI is talking about. Across our four platforms, the share of mentioned brands that are also cited as sources can be as low as 30% (on Google Gemini). Both should be tracked across your target platforms.

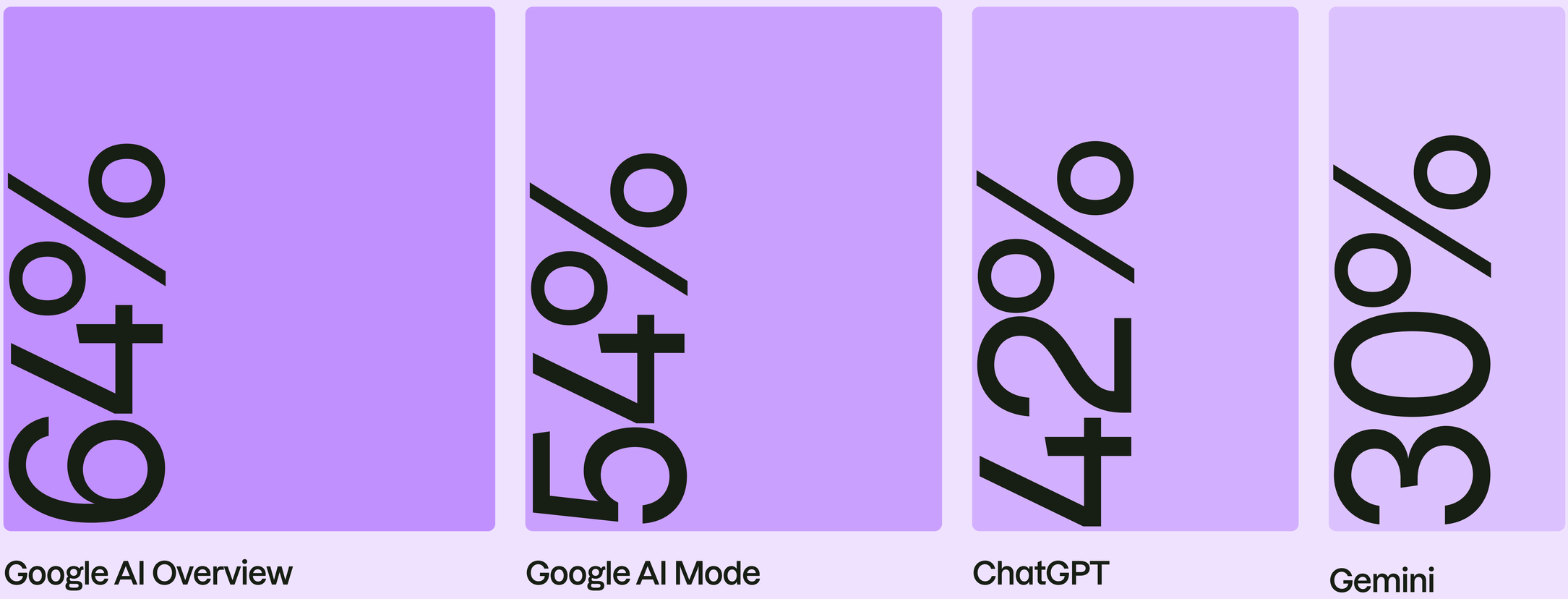
2 Brand authority and content alignment beat content volume

The brands AI describes most consistently aren't expanding content for volume's sake. They publish the right content on the right surfaces, owned and third-party, so AI systems receive a consistent, coherent signal about who they are and what they do. Patagonia illustrates this: its AI Visibility has held at a score of 79 or 80 in every month of the window, and six specialist outdoor-gear sites describe the brand in AI answers more than the entire Tier 1 traditional media combined.



3 The AI search channel fallacy

Your strategy needs separate calibration for each AI platform you target. Each of the four AI platforms that we analyzed showed unique behavior in brand mentions and cited sources. The mention-source overlap (how aligned AI's mentioned brands are with the sources it quotes from) illustrates this, varying by 34 points across them:



Another consideration is Google's current user advantage. While ChatGPT has ~1 billion monthly active users, Gemini alone sits at ~900 million, AI Mode at ~1 billion, and AI Overviews ~2.5 billion. This is alongside Google Maps, Google Shopping, YouTube, and more.

The takeaway:

You have to know which platforms your audience uses, where the growth is heading, and center your AI visibility strategy here.

4 The Universal 36 appear everywhere, every month

The Universal 36 are the brands that appear in the top 100 of each AI platform, every month from January through April 2026. They are the rare exception of the more than 1,200 brands that surface across the four platforms. Below this universal core, platform rankings diverge sharply (see Finding 3).

These are platform-scale audience brands (YouTube, Reddit, Facebook), category-defining commerce (Amazon, eBay, Apple), and multi-decade recognition (Disney, Nintendo, Marvel). For most enterprise brands, the Universal 36 is the ceiling, not the target.

5 Each LLM has a distinctive diet of sources and citation density

The platforms mention similar numbers of brands (consistently 22-25) but citation numbers and domain types vary wildly per response:

15.4 sources

predominantly reference and community (Wikipedia and Reddit feature heavily)

11.4 sources

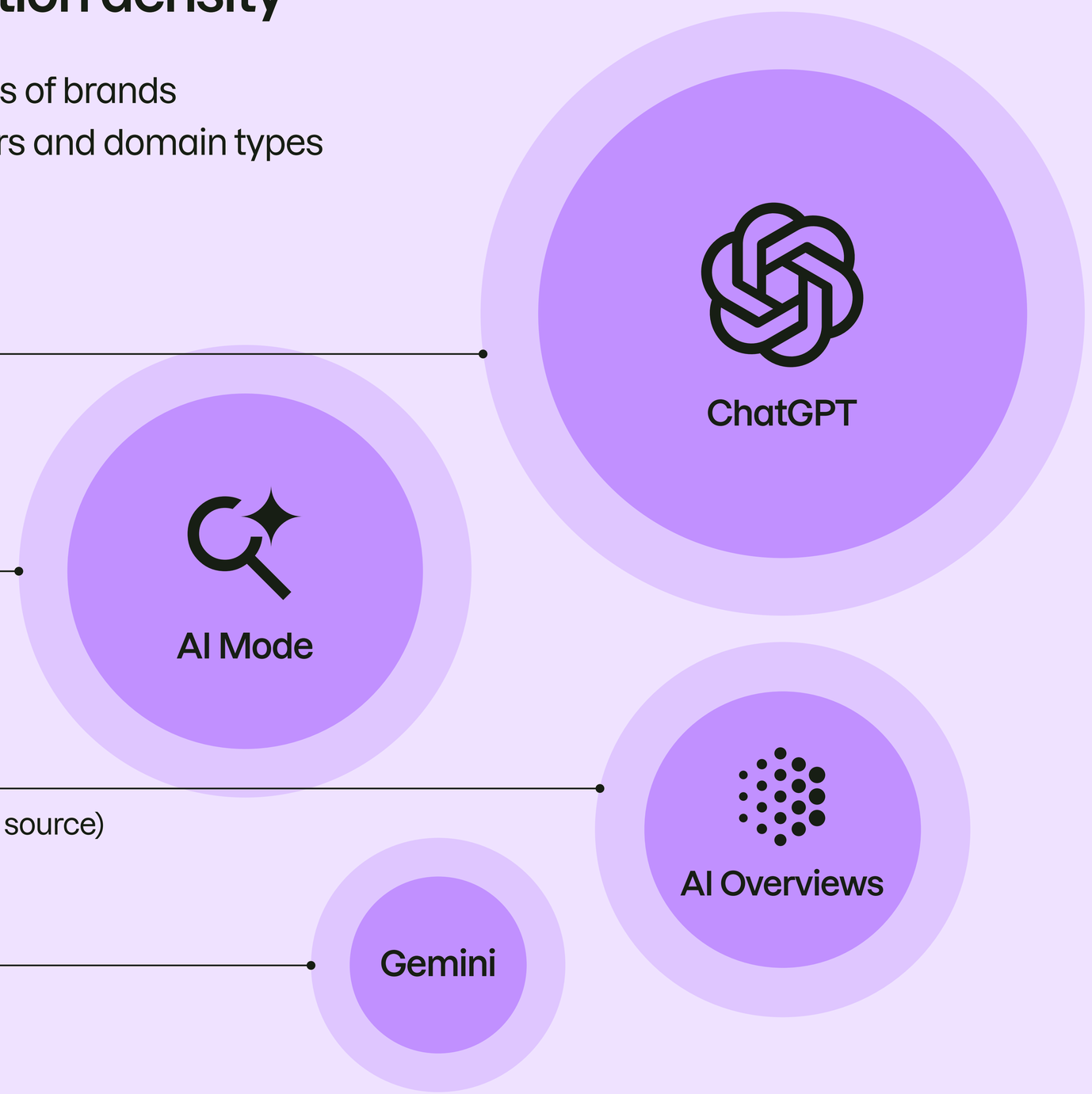
leaning social and local (Facebook, Instagram, Yelp)

9.2 sources

video dominates (YouTube is the single biggest source)

3.3 sources

favoring entertainment and commerce (YouTube, Wikipedia and ecommerce lead)



The takeaway:

No single content type wins everywhere. A brand focused solely on community discussion over-indexes on ChatGPT; one focused solely on video over-indexes on AI Overviews. Match your content to the platforms that your audience uses.

6 AI Overviews live in a different world

More than twice the length. That's the gap between an AI Overviews prompt (around 25 characters) and a prompt going to any of the other three platforms (around 58 characters). The reason matters: AI Overviews prompts come from Google Search keywords, not conversations.

Shorter requests produce short answers. Short answers pull from fewer sources. Its location also means that AI Overviews behaves more closely to SEO: quick, definitional, keyword-led.

Treat all four as one channel and you'll over-invest in keyword optimization for the conversational platforms, or starve AI Overviews of the concise definitional content it actually wants.

7 Integration of SEO and AI search is the gold standard

According to a Semrush survey of 481 marketers on AI search behavior, 81% of marketers with fully integrated SEO and AI search execution report more traffic or leads from AI platforms. Among teams with completely separate workflows, that drops to 36%. The biggest single lever in our research is an organizational design choice.

8 Different business models win differently

What wins depends on what kind of business you are, and the playbooks don't transfer. Marketplaces (Amazon, Walmart, eBay) win through transaction scale and product depth. Community platforms (Reddit, Wikipedia, Quora, Fandom) win through user-generated content libraries. Brands with strong citation infrastructure (Patagonia, Shopify, Cleveland Clinic, NerdWallet) win by being described consistently across the sources AI quotes from.

These are fundamentally different business models with fundamentally different mechanisms. Find the one that fits you and build for it.

9 Consider the balance of first-party and third-party citations

How much of a brand's AI visibility comes from its own domain versus third-party sources varies widely. Some brands, like Wikipedia, earn most of their AI presence from their own pages. Others lean almost entirely on third-party sources: review sites, community platforms, category publications. Most sit somewhere in between.

Build for the whole spectrum. Owned content and third-party presence then work together to reinforce your brand signals and form a mix that can accurately cover a wider scope of prompts.

10 Where the brand is brightest, the brand can fade

Your platform concentration is a risk worth considering. Cleveland Clinic gets 86% of its AI mentions from Google AI Overviews alone. Yelp gets nearly half its total mentions from Google AI Mode. A shift in how either these platforms construct answers would have massive visibility implications.

Chapter 3

Five moves to build the brand AI sees.



Quick orientation:

A mention is when AI search names your brand in its answer. A citation is when AI quotes from your website as a source. They are independent. AI can talk about your brand without quoting your site, and quote your site without naming your brand.

The AI Visibility score measures how often a brand shows up in responses to the prompts in our US dataset, and how consistently compared to other brands.

The 2026 data points to one finding above all others. AI systems build their answers from signals across owned and third-party surfaces, and the brands winning visibility are the ones whose signals say the same thing everywhere. Not more pages. Deeper coverage on the topics that matter, distributed across the sources AI actually quotes from: review sites, community platforms, category publications. Content still matters enormously. What changed is where it needs to live.

Patagonia is the cleanest published example of this. The brand carries an AI Visibility score of 79/100, and this score has held stable at 79 or 80 across January to April, 2026.

In fact, Patagonia scores near-identical visibility in three of the four platforms:

ChatGPT 76

Gemini 78

AI Mode 76

AI Overviews 87 *lifting the combined score even higher

Month-to-month stability across platforms is rare and hard-won.

Patagonia gets there not only through paid media, content volume or SEO, but because it also draws on specialist outdoor-gear review sites. The top six of these collectively account for over 65,000 brand mentions across AI answers. More than the entire Tier 1 traditional media combined.

AI search reads that ecosystem and describes the business and its products consistently, because Patagonia's content strategy is built into the brand itself.

The question organizations keep asking is 'how do we rank in AI?' but it misses the point. Most brands are invisible in AI-generated answers entirely, and the ones that do appear often show up wrong: mispositioned, conflated with a competitor, stripped of context. LLMs build a confidence picture from everything the internet says about you, not just your owned content. The organizations getting this right treat AI visibility as a content operations discipline. The ones that don't will simply stop showing up altogether.



Jordan Jewell

Sr Research Director, Persuasive Content & Digital Experiences, IDC

What the data shows about brands winning AI visibility

Four characteristics surface across the 126M-prompt US dataset. None is a quick AI optimization fix. They're brand fundamentals that AI search rewards because they exist upstream of any platform.

AI can't replicate proprietary assets

The most-cited sources have content libraries no competitor can substitute: IMDb's film database, Investopedia's financial dictionary, Wikipedia and Reddit's decades-deep collaborative libraries, Cleveland Clinic and Mayo Clinic's medical reference depth. AI cites IMDb 3.9x and Wikipedia 4.3x for every mention.

For your brand, ask what you own that AI couldn't reconstruct from other sources.

Specialists out-cite generalists in every vertical

Becoming the go-to authority on three subjects is often more valuable than light coverage of 30. These industries demonstrate this:

- **Finance:** NerdWallet, Investopedia and Bankrate lead, not Forbes or WSJ.
- **Automotive:** KBB and Edmunds (both US automotive specialists) sit above broader business publishers.
- **Health:** Healthline, Mayo Clinic and Cleveland Clinic win.

Brand consistency must be cultivated

Consistency is built upstream of AI, in the network of sources AI quotes from. Patagonia and Shopify act as key examples of this, utilizing core messaging, targeting category niches, and leveraging a network of third-party placements to build visibility across platforms. Brands with inconsistent messaging and third-party source networks will struggle to do so.

Tangible products or services rise to the top

The Universal 36 contains no traditional news outlets or content-focused publishers. Every brand offers something customers actively seek by name. AI rewards brands that offer something to do, not just something to say.

The four layers of Brand Visibility

Brand visibility in AI builds in four layers, each owned by a different team. AI has to find you (discoverability), understand you correctly (clarity), see you as qualified to include (authority), then trust you enough to recommend you (trust). A brand can be strong on one layer and stall on the next. The five moves that follow work across all four.

Layer 1. Discoverability

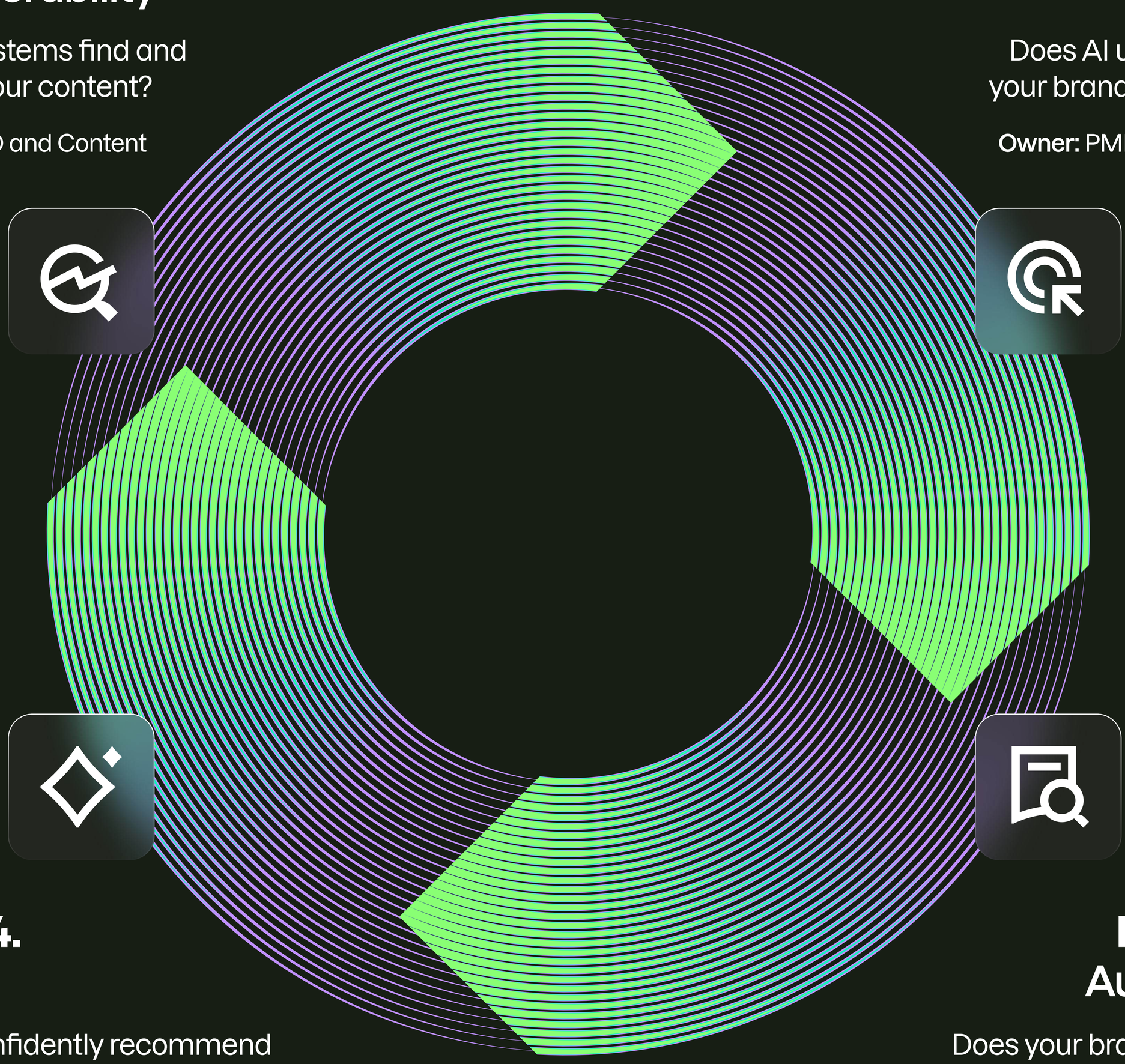
Can AI systems find and retrieve your content?

Owner: SEO and Content

Layer 2. Clarity

Does AI understand your brand correctly?

Owner: PMM and Brand



Layer 4. Trust

Will AI confidently recommend or act on your brand?

Owner: Social, Community and CS.

Layer 3. Authority

Does your brand appear qualified to be included?

Owner: PR, Partnerships and Affiliate.

Move 1

Build for the versions of your brand AI sees

The unified “AI search strategy” doesn’t survive contact with the 2026 data. The platform variance is too great:

ChatGPT and Gemini share 78 of their top-100 mentioned brands, the closest agreement between any platforms.

Google AI Overviews is the outlier, with mention overlap of just 50 to 56% with the other platforms.

Alongside this, the citation overlap runs below 50% across every pair. Each platform leans on different sources:

- ChatGPT cites Reddit heavily.
- Gemini cites Wikipedia most.
- Google AI Mode and AI Overviews cite YouTube above any other source.

At brand level, divergence in AI visibility is clearly observable. For example, Notion’s AI Visibility ranges from 58 to 72 across the platforms. The key is minimizing this through a tailored approach to the models that matter most.

Start here this quarter

Pull a single-month AI visibility report split across all four platforms to show any divergence. Not aggregated. Most brands only see the average.

Going deeper



Semrush’s AI Operating System

Turn the insights in this report into a plan your team can execute on.

Enroll for free at ai-search.semrush.com

Common mistake

Optimizing for ChatGPT alone and assuming the work transfers. The 50% mention overlap with AI Overview shows that half of it doesn’t.

Move 2

Win citations in your industry's Citation Core

How citations are earned is the observation with the steepest implications for teams.

SEO has trained marketers to think of their own domain as the primary asset. But AI search most often treats third-parties as the primary signal for who should be mentioned.

Conversely, the brands AI cites at scale are not the brands AI is talking about. We call this the Source Surplus: the gap between how often AI cites a domain and how often that same website's brand gets mentioned in AI answers. Sites with a high surplus have become infrastructure for the answers AI gives about everyone else.

Across the platforms we measured, the highest-surplus brands are reference and review platforms, not product brands. Think Wikipedia, Healthline, and IMDb (Chapter 6 has the full top-12 list).

Every brand on this list is a resource AI uses to construct an answer about something else. This runs against the typical marketing instinct for most brands. If you want to build authority, the most direct route isn't to publish more content on your own domain.

It's to show up consistently in your industry's Citation Core. This is the small group of sites that all AI platforms tend to trust, cite, and use as default sources in your industry:

- For software in the US: G2, Capterra, TrustRadius, Forbes Advisor.
- In finance: NerdWallet, Investopedia, Bankrate.
- In beauty: Allure, Byrdie.
- In travel: TripAdvisor.

And by region, as illustrated by the Automotive industry:

- In the US: KBB and Edmunds;
- In the UK: AutoTrader and What Car?
- In Germany: mobile.de and Auto Bild

Manage your brand's representation inside the key sources or accept what those sites say about you by default.

Start here this quarter

Audit how your brand is described in the top three third-party authority sites for your vertical. Most brands haven't read those descriptions in months.

Common mistake

Treating citation strategy solely as an extension of content marketing. Content teams optimize owned domains. PR teams handle press. Brand handles activations. Specialist-platform presence needs connected effort, or a new single discipline that owns it.

Move 3

Aim at category leadership, not universal visibility

The Universal 36, the brands appearing in the top 100 of every platform every month, act as a near-default answer: YouTube, Google, Reddit, Facebook, Amazon, Apple, eBay, Walmart, plus 28 others (the full list and findings are in Chapter 4). For all but a few names, this tier is the ceiling, not the target. A strategy that aims to displace them will fail.

What's achievable is category leadership. Our data shows the concentration of top-10 mentions held by the top three brands varies by ~41% across verticals:

- News & Media is the most concentrated at 82.9%
- Finance is the flattest at 41.4%

In a concentrated vertical that's winner-takes-most, breaking into the top three is a massive leap. In a flatter vertical, focused investment can shift ranking position quarter by quarter.

LEGO represents the absolute ceiling of category-level dominance. Its AI Visibility score is 88, and sub-brand recognition extends to Duplo, Technic, Ninjago and Bionicle, over 10,000 distinct topical conversations in AI training data. This has compounded over decades. LEGO should be considered as a reference for continued brand building, not a target.

Start here this quarter

Review your category's concentration percentage in Chapter 4. If this is above 70%, plan for incremental improvement and a ceiling of positions 4 to 10. If concentration is under 50%, there's an opportunity to be ambitious and snag a top position.

Common mistake

Benchmarking against the Universal 36 or across verticals. A finance company benchmarking against YouTube is apples and oranges.



Move 4

Compound your brand across owned, earned and community

The brands consistently building AI authority run these layers in parallel.
Shopify has done so at scale:

- 119,300 cited pages (the deepest footprint in our case study set)
- Mention and citation balance on Google AI Overviews, appearing 45,098 times as a mentioned brand and 46,342 times as a cited source. Almost identical numbers, a balance most brands cannot achieve.

Three layers drive this performance:

- Specialist software-review platforms (G2, Capterra, TechRadar, Forbes Advisor)
- Topic and sub-brand authority (the Shopify Plus sub-brand scores 63.8/100 on its own)
- A long tail of community sources (Reddit, YouTube, developer forums, agency blogs).

None alone would produce Shopify's citation footprint. The multiplying effect of running all three over years does.

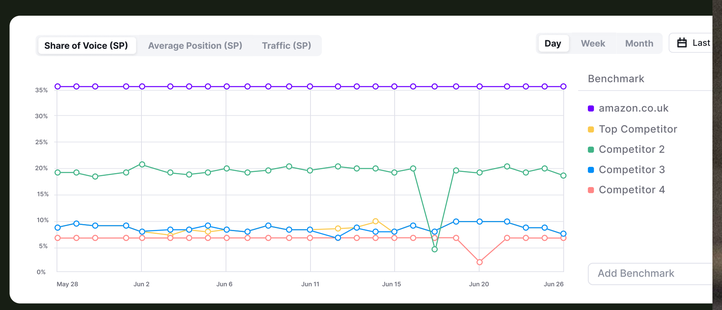
Start here this quarter

Identify which of the three layers is weakest for your brand and concentrate investment there. Don't try to build all three at once.

Common mistake

Treating it as a one-time content campaign. Compounding requires sustained presence over 12 months minimum.

You can publish the strongest owned content in the world, but if GPTBot can't render it, it doesn't exist in ChatGPT. **Semrush's Enterprise Site Intelligence** makes the invisible, visible: Bot Analytics tracks every AI and search crawler hitting your site, while Crawler Profiles let you crawl your pages exactly the way each agent does, surfacing rendering and access issues before they cost you citations.





Move 5

Measure four platforms, not one number

Semrush's survey of 481 marketers on AI search behavior found 45% of marketers cannot properly measure visibility in AI answers; only 9% can measure all the metrics that matter.

A single "AI Visibility" score is useful for benchmarking, but it can hide a performance spread across platforms, hide which platform is driving growth (and which is decaying), and hide the gap in mentions and sources between platforms.

A cross-platform view captures what aggregate metrics cannot: per-platform mentions and trajectory, per-platform citations, per-platform mention-source overlap, top cited sources alongside your brand, and cross-platform consistency.

Start here this quarter

Set up parallel tracking of mentions and citations as separate metrics, split by AI platform, with brand-level granularity. **Semrush's AI Optimization (AIO)** enables this across every leading LLM, including category-specific platforms.

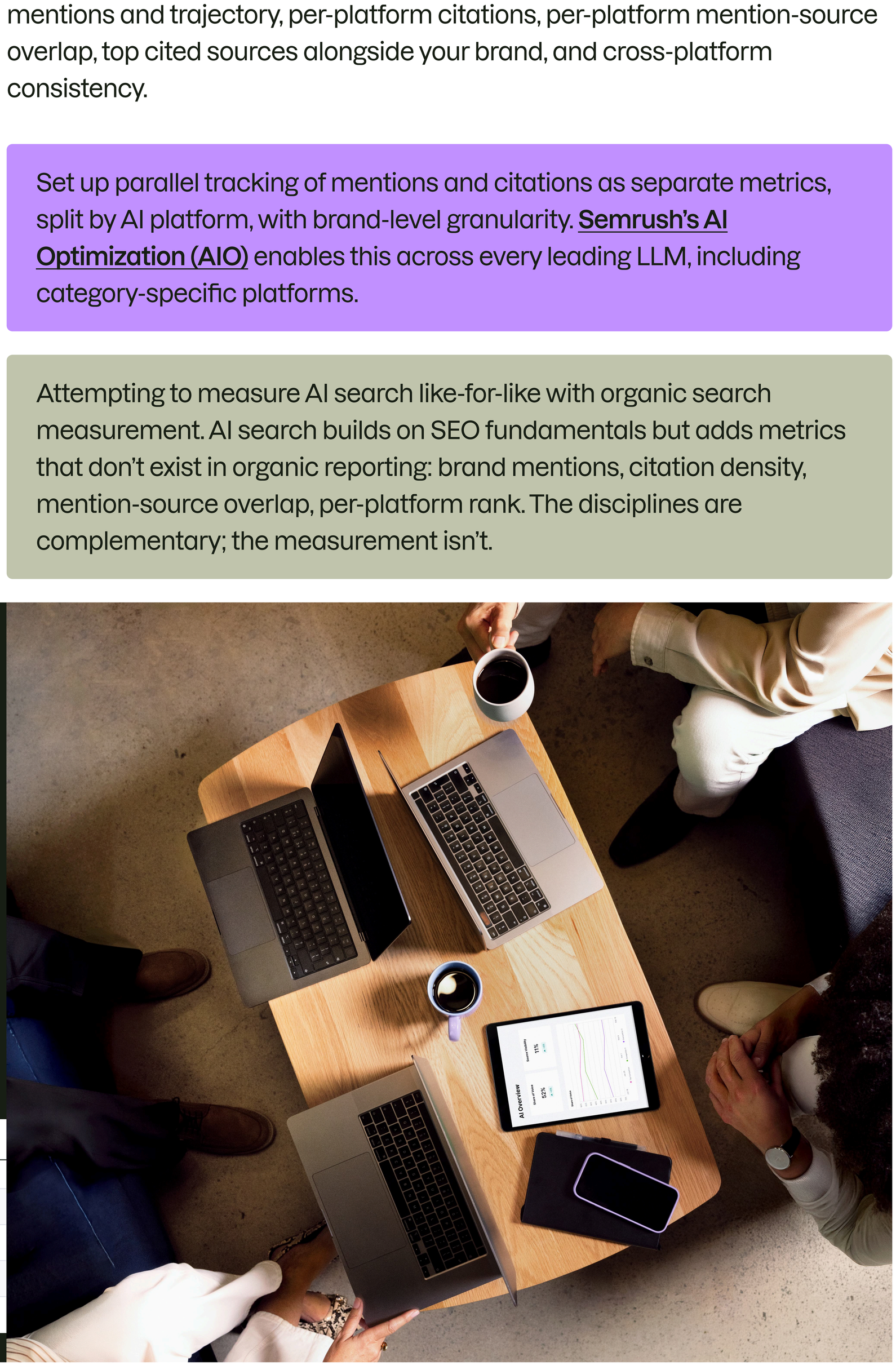
Common mistake

Attempting to measure AI search like-for-like with organic search measurement. AI search builds on SEO fundamentals but adds metrics that don't exist in organic reporting: brand mentions, citation density, mention-source overlap, per-platform rank. The disciplines are complementary; the measurement isn't.

Semrush's Enterprise AI Optimization (AIO) is built for precision strategy. Monitor per-platform brand mentions, rankings, citations and source overlap across leading LLMs like ChatGPT, Perplexity, Google AI Mode, and vertical-specific platforms.

Prompt Tracking Rankings

Model	Share of Voice	Mentions
Google AI Overview	52%	3,979
ChatGPT	55%	4,946
MS Copilot	43%	3,154
Perplexity	54%	4,220



The five moves at a glance

Move 1
Build for the versions of your brand AI sees

We found significant platform variance between ChatGPT, Google AI Mode, Gemini, and AI Overview. ChatGPT and AI Overviews share **less than 56%** of the mentioned brands and the citation overlap runs below 50% across every pair.

ChatGPT cites Reddit heavily.

Gemini cites Wikipedia most.

Google AI Mode and AI Overviews cite YouTube above any other source.

Tailor your approach to each platform's preferred sources.

Move 2
Win citations in your industry's Citation Core

Consistently appear in your industry's trusted Citation Core:

Software (US)	Finance	Beauty	Travel
G2, Capterra, TrustRadius, Forbes Advisor	NerdWallet, Investopedia, Bankrate	Allure, Byrdie	TripAdvisor

Manage how your brand is represented on these key default sources.

Move 3
Aim at category leadership

We found **36 brands** appearing in the top 100 of every platform every month. But for few, this tier is not the target. Category leadership is achievable.

Our data shows the concentration of **top-10 mentions** held by the top three brands **varies by ~41%** across industries:

News & Media is the most concentrated at **82.9%**

Finance is the flattest at **41.4%**

Your industry steers the tactics and possible visibility, benchmark against the brands leading in yours.

Move 4
Compound your brand across owned, earned and community

Build AI authority across three parallel layers with consistent messaging:

Specialist review platforms (G2, Capterra, TechRadar, Forbes Advisor)

Topic and sub-brand authority (Core messages and sub-brands in industry placements)

Long tail of community source (Reddit, YouTube, developer forums, agency blogs)

Running these with consistent brand-led messaging embeds you in responses over time.

Move 5
Measure across platforms

Invest in a cross-platform view to track granular per-platform mentions, trajectories, top cited sources, and cross-platform consistency.

Roadmap: Start here

Days 1-30
Set the foundation

- Identify the AI platforms your audience uses most
- Audit baseline AI Visibility and define your Citation Core
- Assign ownership for AI search

Days 31-60
Build Measurement

- Set up platform-level tracking for mentions and citations
- Benchmark competitors (Enterprise AI Optimization can help)
- Launch a first citation initiative (e.g., G2 reviews)

Days 61-90
Act on first signals

- Re-measure visibility against the baseline
- Prioritize your weakest platform and adapt content accordingly
- Share a leadership update with results and next steps

Months 4-12
Scale and embed

- Expand successful citation strategies
- Conduct sub-brand visibility audits
- Establish quarterly benchmarks
- Strengthen your Citation Core
- Align brand, content, and CX teams around a shared AI Visibility model

Tip: For full end-to-end operationalization, **Semrush's AI Search Operating System** provides the full methodology, tactics, and team certification.

Self-audit: How mature is your brand?

Score one point per yes across these 10 questions.

1. Is your AI Visibility spread across your key platforms under 10 points?
2. Are at least 30% of your AI citations from your own domain (first-party share)?
3. Has your brand's AI mentions grown in the past three months?
4. Does your brand have a clear single owner of AI search internally?
5. Do you track mentions and citations as separate metrics?
6. Have you mapped your competitive co-occurrence set on each platform?
7. Do you measure visibility per AI platform separately, not as a single AI search score?
8. Do you appear among your industry's top brands on multiple platforms, not just one?
9. Are authoritative third-party sources (review sites, Wikipedia, industry press) cited sources for your brand alongside your own content?
10. Is your brand described with consistent language across the sources AI quotes from?

Scoring

9-10	6-8	3-5	0-2
Category-leading maturity	Middle tier, where most enterprise brands sit	Behind the curve, foundational work needed	AI search not yet operationalised

The 30/60/90 plan

Days 1-30

Set the foundation

- ☑ Audit current AI Visibility scores across all four platforms. Establish the baseline.
- ☑ Identify your category's Citation Core, the group of sites that AI platforms trust, cite, and use as default sources in your industry.
- ☑ Assign internal AI search ownership. One person, named in writing, with explicit authority across SEO, content, brand and CX.

Days 31-60

Build measurement

- ☑ Set up tracking per-platform. Your dashboard needs separate metrics for mentions, citations, and an AI Visibility score across all four platforms to start. Third-party source citation tracking is also vital.
- ☑ Map your brand's competitive co-occurrence set. Which brands does AI mention alongside yours?
- ☑ Pilot one citation infrastructure investment (e.g., improve your Wikipedia page, build reviews on G2).

Days 61-90

Act on first signals

- ☑ Re-measure your AI Visibility against the day-one baseline and quantify movement.
- ☑ Identify the platform where you're weakest. Diagnose why using the source-diet analysis in Chapter 5.
- ☑ Brief leadership with the first signal-to-action loop: baseline, intervention, result, next steps.

Months 4-12

- ☑ Scale the citation approach that worked in pilot.
- ☑ Begin sub-brand visibility audits.
- ☑ Bring brand, content and CX teams into the same operating model.
- ☑ Establish quarterly benchmark review.
- ☑ Deepen the Source Surplus investment for your category.
- ☑ By month 12, run a full re-audit and plan year-two investment based on actual movement.

For teams ready to operationalize this from end-to-end, Semrush's AI Search Operating System provides the full methodology, validated tactics, and a certification path for teams.

Chapter 4

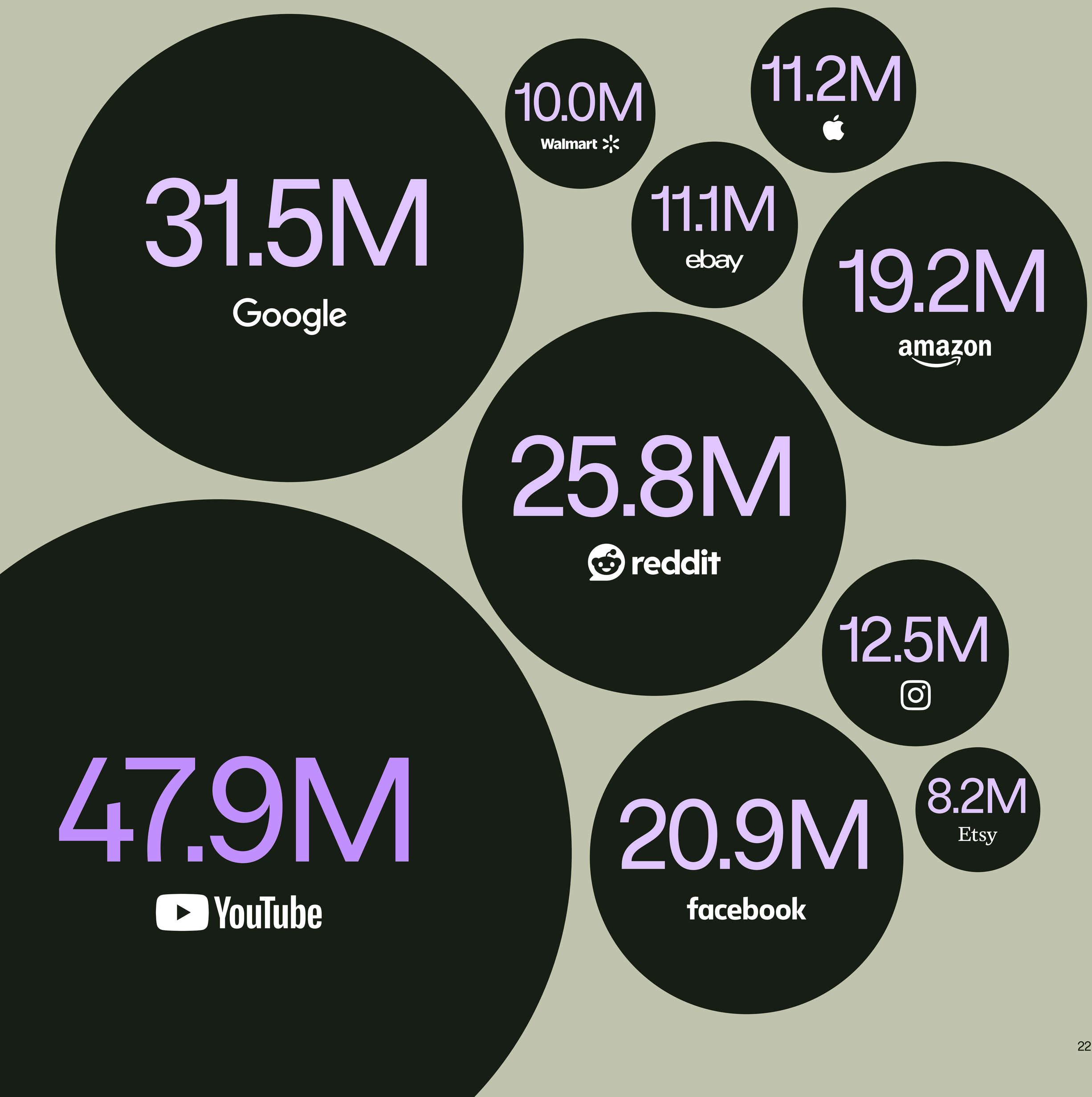
Meet the Universal 36, the platform leaders, and the Concentration Curve.

Visibility stays the same for AI in 2026

Three structures describe the state of AI visibility in 2026: the brands that appear everywhere (the Universal 36), the brands that lead on each platform (the top-10 rankings differ sharply between platforms), and how category concentration varies across the 22 verticals (the Concentration Curve).

The Universal 36

These brands appear in the top 100 most-mentioned brands for each of the analyzed AI platforms, in every month from January through April 2026. It is the most defensible cut of universal AI authority.



The full list

1. YouTube 47.9M	2. Google 31.5M	3. Reddit 25.8M	4. Facebook 20.9M
5. Amazon 19.2M	6. Instagram 12.5M	7. Apple 11.2M	8. eBay 11.1M
9. Walmart 10.0M	10. Etsy 8.2M	11. Yelp 7.6M	12. TikTok 6.9M
13. Microsoft 5.9M	14. Netflix 4.3M	15. Disney 3.1M	16. Home Depot 3.1M
17. LinkedIn 2.9M	18. IMDb 2.8M	19. Ford 2.7M	20. Spotify 2.6M
21. Indeed 2.6M	22. Adobe 2.3M	23. FDA.gov 2.1M	24. Pinterest 2.1M
25. Samsung 2.1M	26. Toyota 2.1M	27. NFL.com 2.0M	28. MLB.com 1.9M
29. Chevrolet 1.9M	30. Marvel 1.8M	31. Honda 1.8M	32. Prime Video 1.7M
33. NBA.com 1.7M	34. Best Buy 1.7M	35. USDA.gov 1.5M	36. Nintendo 1.5M

The volume of mentions trails off steeply from YouTube (47.9M) at the top down to Nintendo (1.5M) at the tail. While all these brands share universal presence, the extent to which they're mentioned across platforms varies widely.

Three things define every brand in the group

1

Platform-level audience or category-defining position

Either part of digital life itself (YouTube, Reddit, Facebook) or the default answer to a purchase or service query (Amazon for commerce, Indeed for jobs, Yelp for local).

2

Multi-decade brand recognition

Most are decades old. True recognition is built over generations of signals, not quarters.

3

Direct task completion

Every brand is a destination where users go to do something specific, whether that's buying, booking, watching or checking an authoritative source.

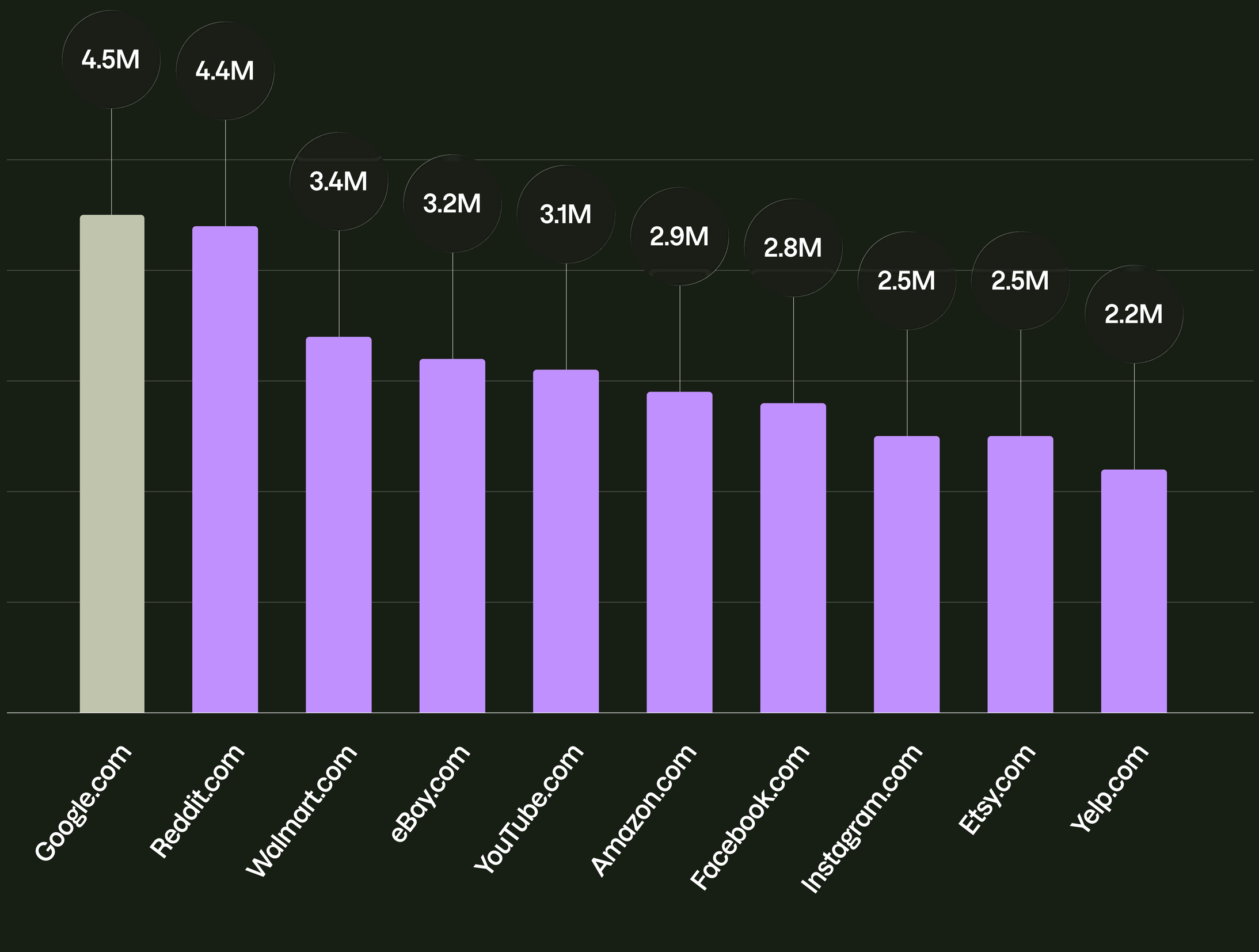
Noteworthy absences

There are no traditional news or content publishers. The pattern: social media brands have broken through as complete platforms. Alongside, AI surfaces brands customers can do something with, not brands that produce informational content alone.

The platform leaders

Same dataset, four very different rankings. These represent the top 10 mentions on each platform, January to April 2026 aggregated.

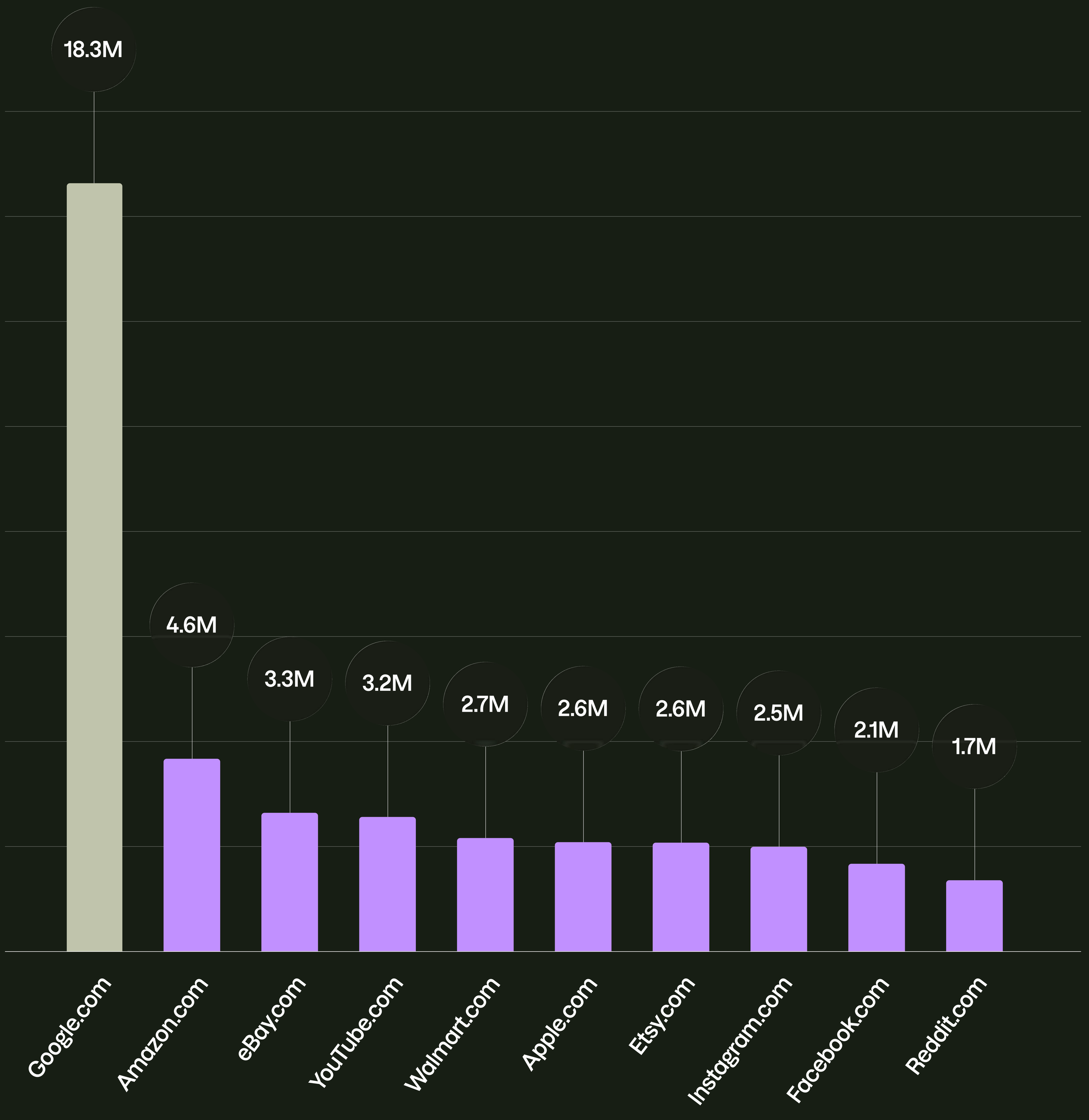
ChatGPT top 10



Noteworthy:

ChatGPT's top tier is led by Google and Reddit, then a run of commerce and social platforms (Walmart, eBay, Amazon, Facebook, Instagram). It leans more heavily on community and reference sources than the other platforms, which shows up in its citation mix in Chapter 5.

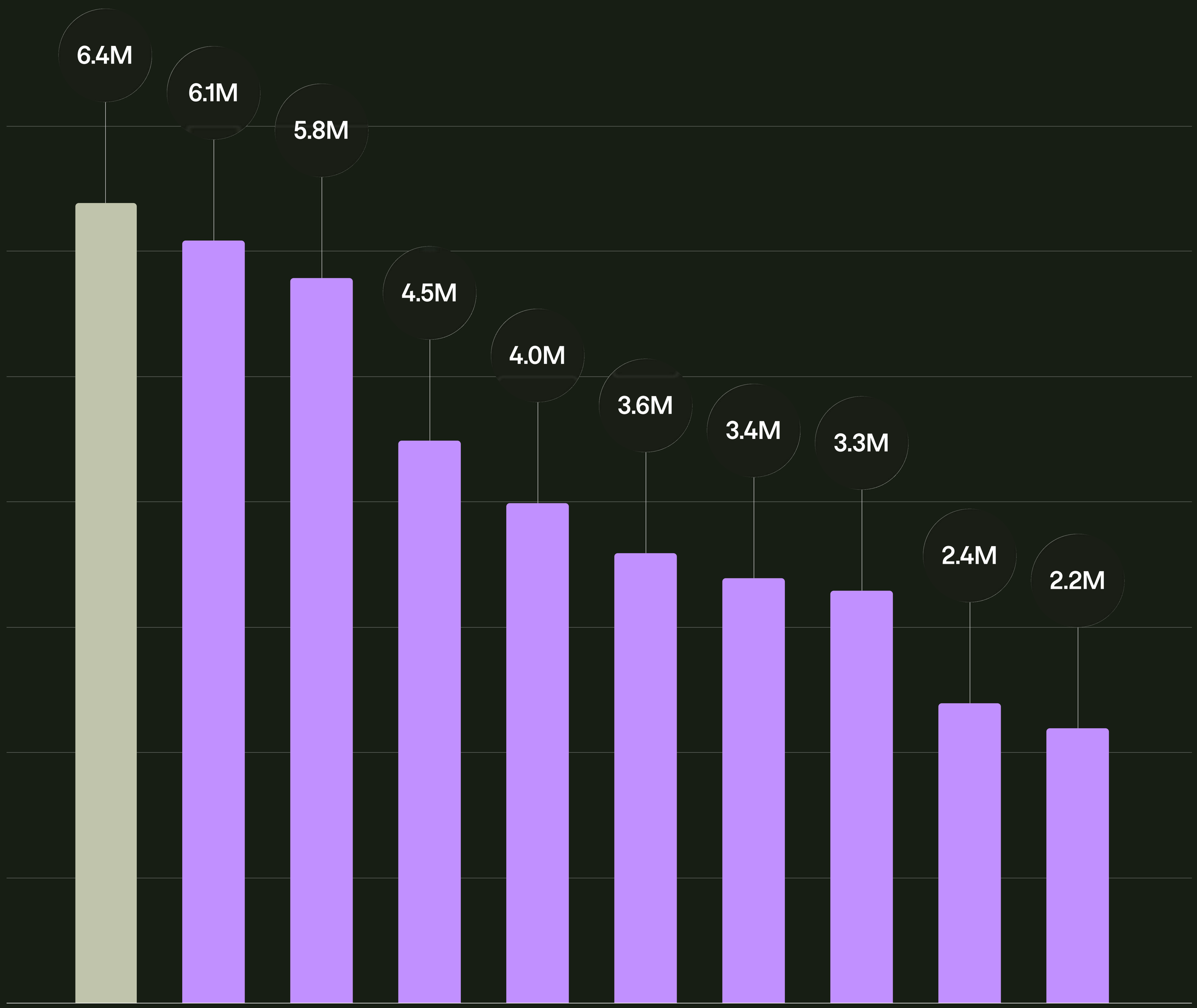
Gemini top 10



Noteworthy:

Google appears prominently on its own Gemini platform, consistent with Gemini's deep integration across Google's product surfaces. Beneath that, the list is commerce-heavy: Amazon, eBay, Walmart and Etsy all feature in the top eight.

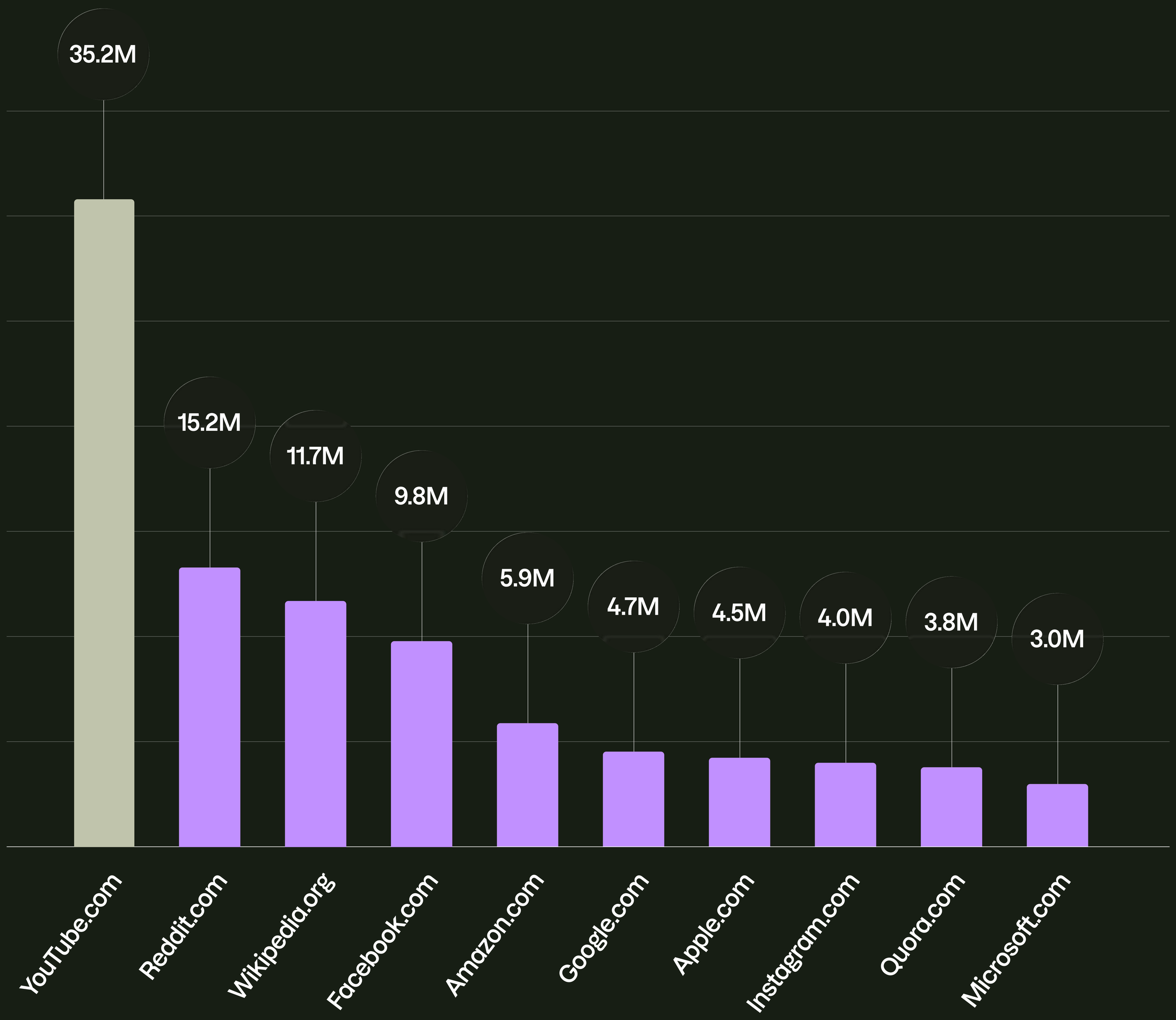
Google AI Mode top 10



Noteworthy:

Yelp at #6. No other AI platform surfaces a local-discovery brand this high. AI Mode handles local-business queries with a weighting that pulls Yelp into the top tier.

Google AI Overviews top 10



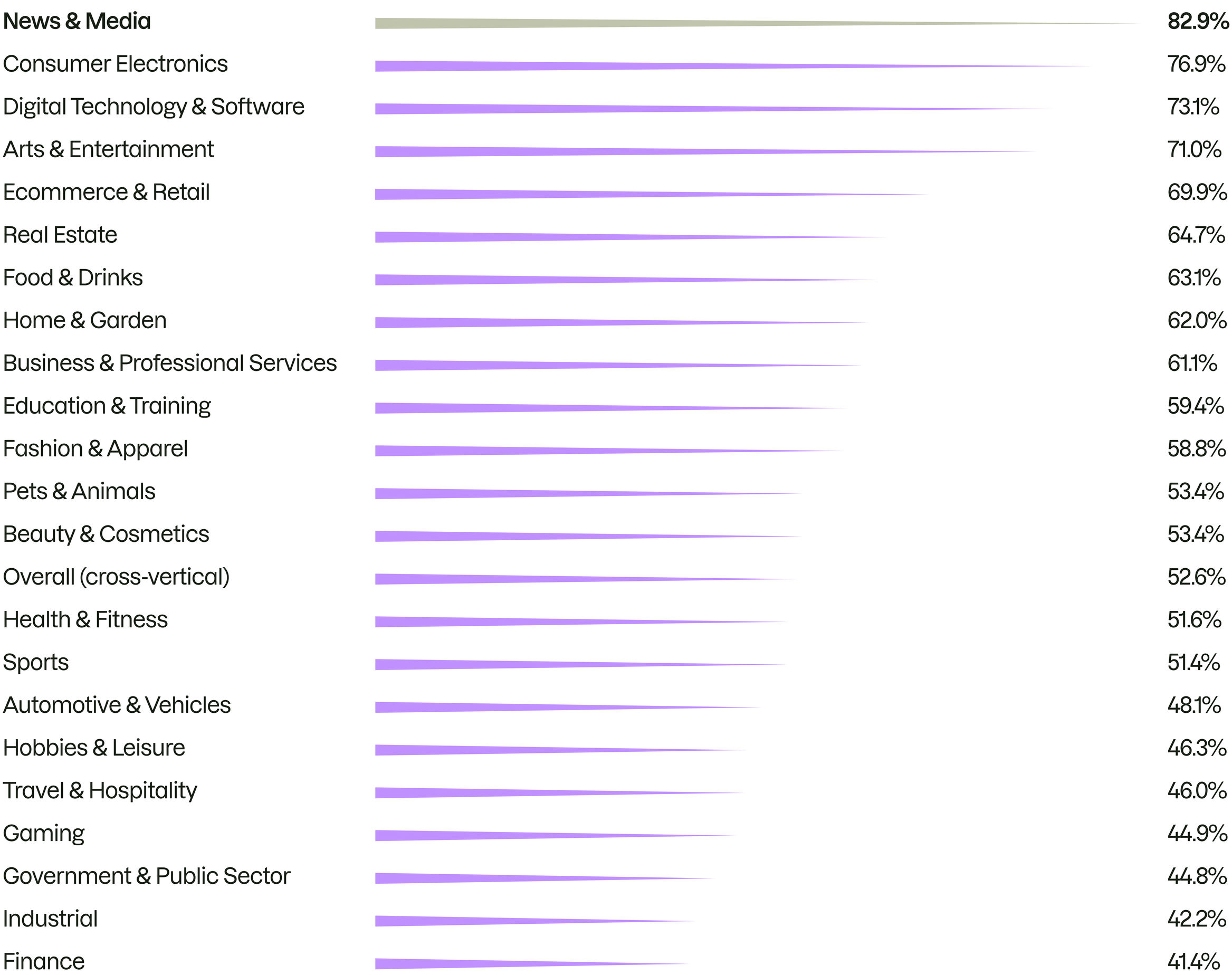
Noteworthy:

YouTube dominates, with more than twice the next brand's volume. The pattern is more pronounced on the citation side as AI Overviews cites YouTube 83.2M times across the four months, more than 2.3x the next-most-cited source (see more in Chapter 5).

Only three brands appear in every platform's top 10: YouTube, Amazon, Facebook.
After that, the lists diverge sharply.

The Concentration Curve

This measures the share of category top-10 mentions held by the top 3 brands. Higher percentages mean AI clusters answers around a small number of brands; lower means it spreads across more.



Noteworthy:

A 41 point gap separates the most concentrated category from the flattest. In News & Media, the top three brands dominate, whereas Finance is far more competitive.

Exploring concentrated verticals

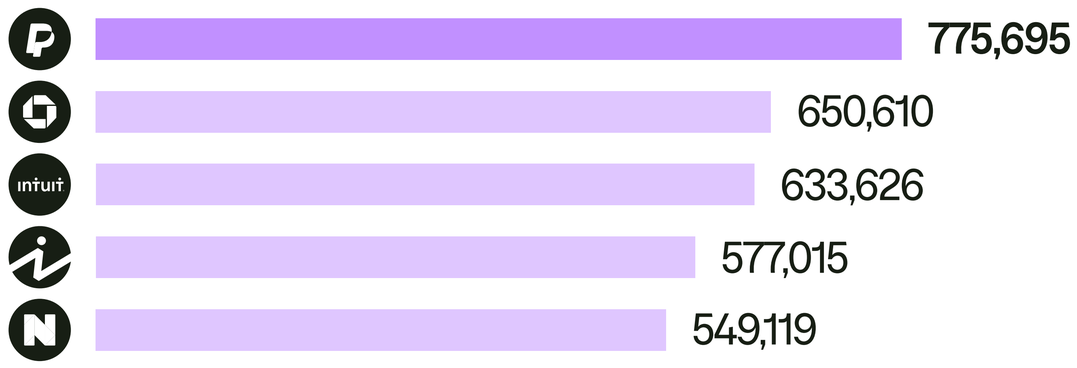
News & Media at 82.9% is the most extreme example. Reddit alone holds 25.8 million mentions in this category across the four months we measured, more than twelve times the next-mentioned news brand (Yahoo at 2.1 million). AI's answers to news questions cluster around Reddit and a small group of large established publishers, leaving little space for emerging entrants.

Consumer Electronics at 76.9% is the cleanest single-brand concentration example. Apple commands 11.2 million mentions in this category, five times the next brand (Samsung at 2.1 million). The category is a near-duopoly at the top with a long tail of smaller brands — and that long tail should be the target for almost every brand.

Exploring flat verticals

Finance is the flattest category (41.4%) and has five brands jostling at the top. PayPal leads with 775,695 mentions, followed by Chase (650,610), Intuit (633,626), Investopedia (577,015) and NerdWallet (549,119). This category has room for movement: focused investment can lift a brand multiple ranks over a few quarters.

41.4%



Industrial (42.2%) behaves similarly, with Boeing, 3M, John Deere, Milwaukee Tool and DeWalt at the top. The category is also relatively small in absolute mention volume, which suggests AI search currently underweights B2B industrial queries compared with consumer categories. As B2B AI search use grows, this category will shift fast.

42.2%



The takeaway

Benchmark your brand against its own category, never the field.

Categories with higher convergence (News & Media, Consumer Electronics, Digital Tech) become winner-takes-most, and breaking into the top three will require considerable time and investment.

In flatter categories (Finance, Industrial, Gaming), focused investment can shift your ranking quarter by quarter.

Source diversity

How many distinct sources does AI cite in each vertical's top tier? Higher numbers mean a wider citation pool. Lower numbers mean a smaller set of authoritative sources.

The most diverse industries:

Industrial: 37 distinct top sources

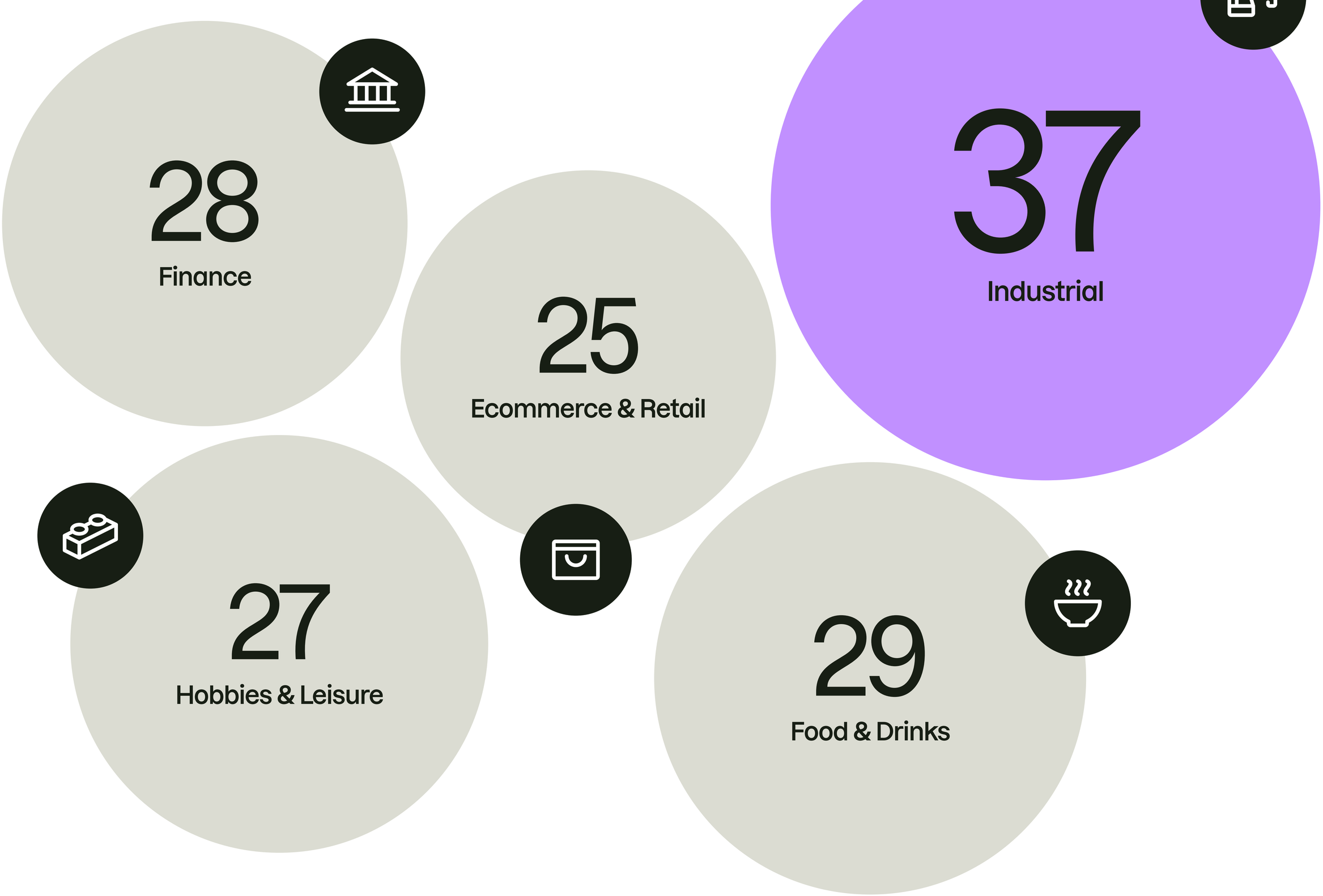
Food & Drinks: 29 distinct top sources

Finance: 28 distinct top sources

Hobbies & Leisure: 27 distinct top sources

Ecommerce & Retail: 25 distinct top sources

News & Media: 25 distinct top sources



The least diverse industries:

Automotive & Vehicles: 18 distinct top sources

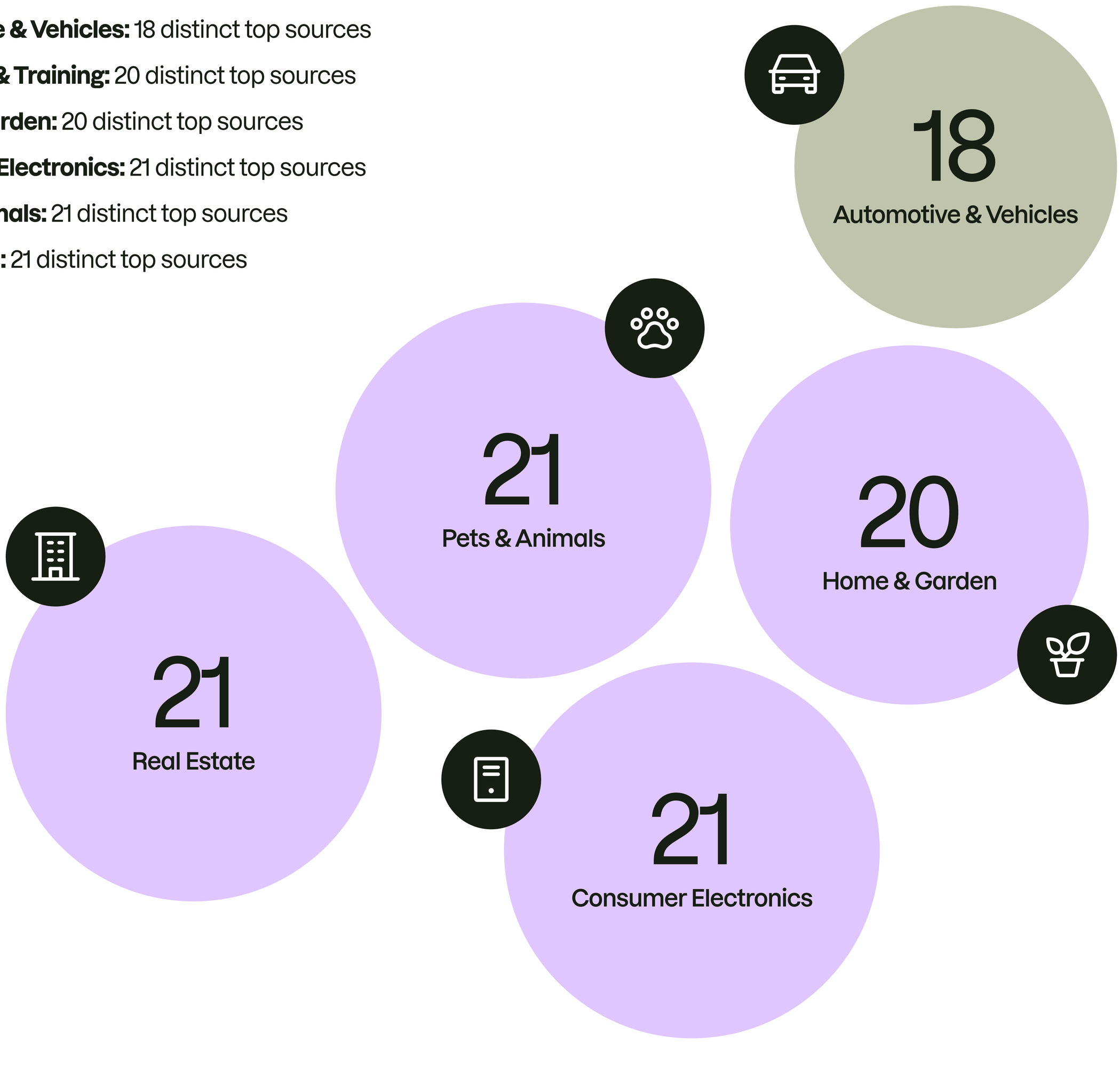
Education & Training: 20 distinct top sources

Home & Garden: 20 distinct top sources

Consumer Electronics: 21 distinct top sources

Pets & Animals: 21 distinct top sources

Real Estate: 21 distinct top sources



The takeaway:

High source diversity loosely correlates with a flatter Concentration Curve score. News & Media is the exception: high brand concentration (the top three brands take 82.9% of mentions) alongside relatively high source diversity (25 distinct sources). AI platforms name a few dominant news brands, but cite from a wider pool of news domains to construct responses.

The three AI visibility clusters

The leaders reveal three structurally different ways that brands win AI visibility, each with its own mechanisms and vulnerabilities.

Commerce cluster

Win through

Transaction scale and product depth. Amazon (19.2M), eBay (11.1M), Walmart (10.0M), Etsy (8.2M), Apple (11.2M), Home Depot, Best Buy, plus newcomers Target and Lowe's. AI surfaces commerce brands because users ask AI commerce questions. Mention volume scales with brand recognition and category fit.

Vulnerability

Heavy mentions but light citations. AI talks about commerce brands without quoting from them. Visibility depends on continued consumer search demand, not on owned content infrastructure.

Community cluster

Win through

User-generated content at scale. Reddit (25.8M mentions, 77.4M citations), Wikipedia (13.1M / 71.7M), Quora (4.4M / 12.1M), Fandom (2.1M / 8.7M), Pinterest, BBB.org. These brands win both mentions and citations because the content is dense, broad and free.

Vulnerability

Most exposed to AI's growing ability to synthesize without attribution. Wikipedia's 50% mention decline from January to April is an indicator. Their citations stay strong, their mentions might be at risk.

Network cluster

Win through

Strong citation infrastructure and category authority. Patagonia, Shopify, Notion, LEGO, Cleveland Clinic, NIH, NerdWallet. AI surfaces these brands because third-party sources speak about them constantly and consistently. The work is upstream of AI.

Vulnerability

Fragile to third-party site changes. Patagonia would be measurably affected if OutdoorGearLab or REI changed their coverage of the brand. Shopify would be affected if G2 or Capterra changed review methodology. Infrastructure is durable but not owned.

Where most brands sit

Most brands sit in one cluster but draw on mechanisms from the others. Apple is primarily Commerce but uses Network mechanisms (apple.com itself is heavily cited). The framework is a diagnostic, not a rigid taxonomy.

If you’re predominantly in the Commerce Cluster, your visibility ceiling is largely set by consumer recognition and product breadth. In the Community Cluster, it’s exposed to AI’s attribution behavior. In the Network Cluster, it’s steered by third-party infrastructure you can shape but don’t own.



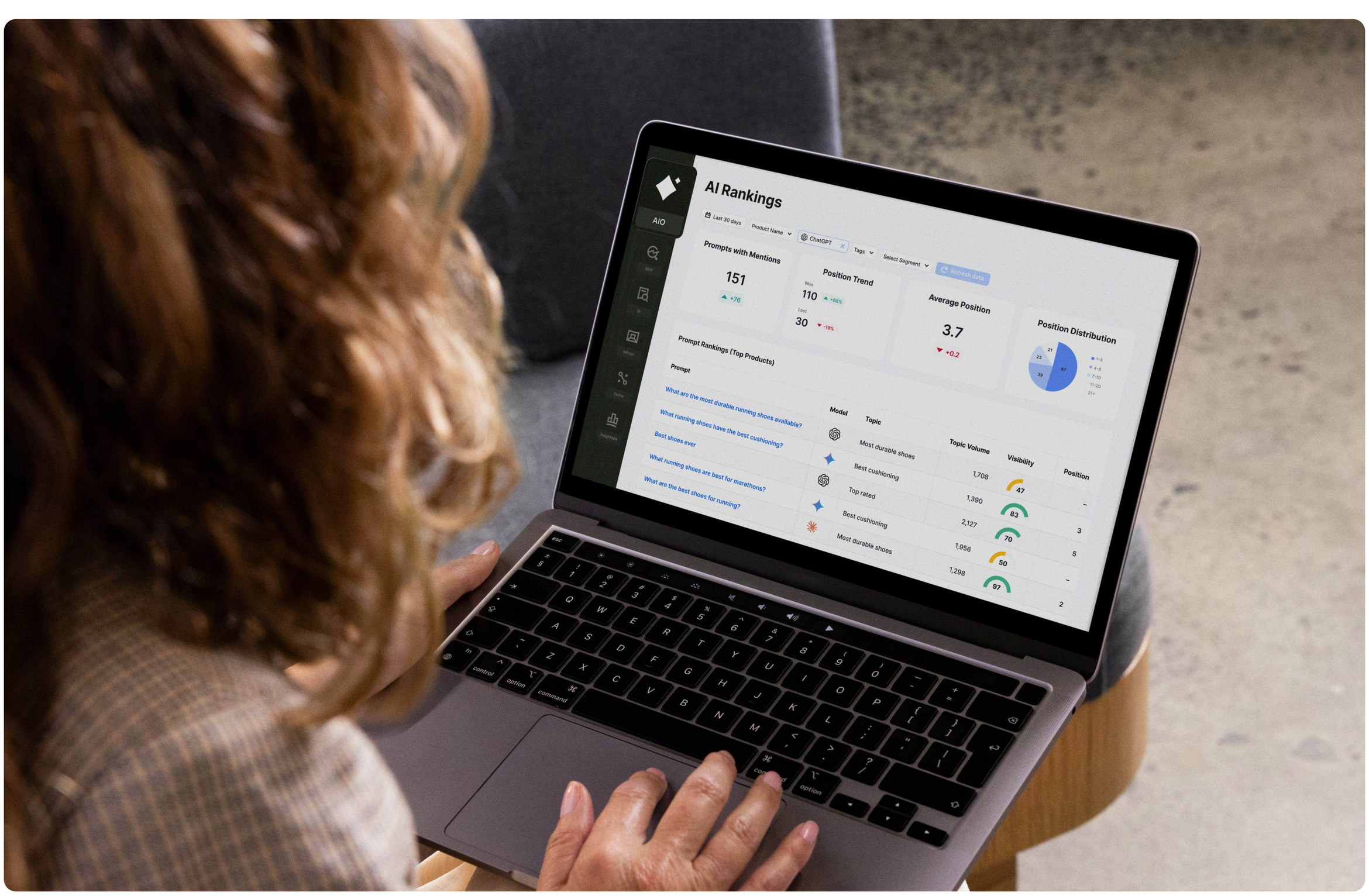
Chapter 5

How ChatGPT, Gemini, Google AI Mode and Google AI Overviews each behave differently.

Search visibility can look very different from one platform to the next. Four distinct behavioural profiles emerge.

Marketers often talk about AI search as if it's a single channel. The data in this report shows it isn't.

The four platforms we measured behave differently from one another in clear, consistent ways.



ChatGPT

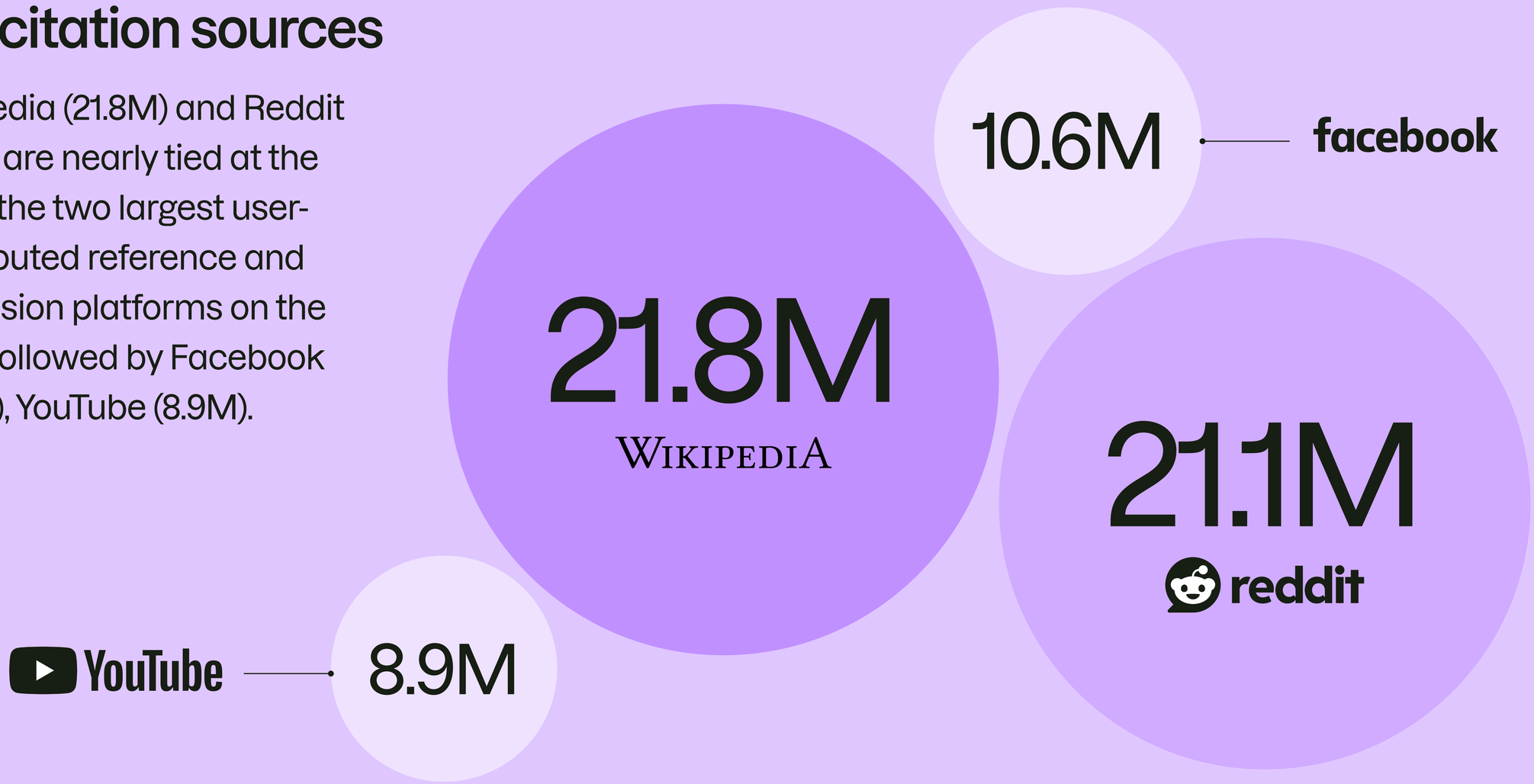
ChatGPT is the first major AI answer engine and the platform most associated with "AI search" more broadly. However, its behavior is more specific than the generic label suggests.

Top brands

Google and Reddit lead, followed by a run of commerce and social platforms: Walmart, eBay, YouTube, Amazon, Facebook, Instagram.

Top citation sources

Wikipedia (21.8M) and Reddit (21.1M) are nearly tied at the top — the two largest user-contributed reference and discussion platforms on the web. Followed by Facebook (10.6M), YouTube (8.9M).



Character

Encyclopedic and community-led. Reaches for Wikipedia and Reddit before anywhere else, so a brand without a credible Wikipedia page, or without active and accurate Reddit threads, faces a meaningful disadvantage.

Strategic implication

Focus on your Citation Core, ensure an accurate Wikipedia presence, and stay active in Reddit and community threads.

Gemini

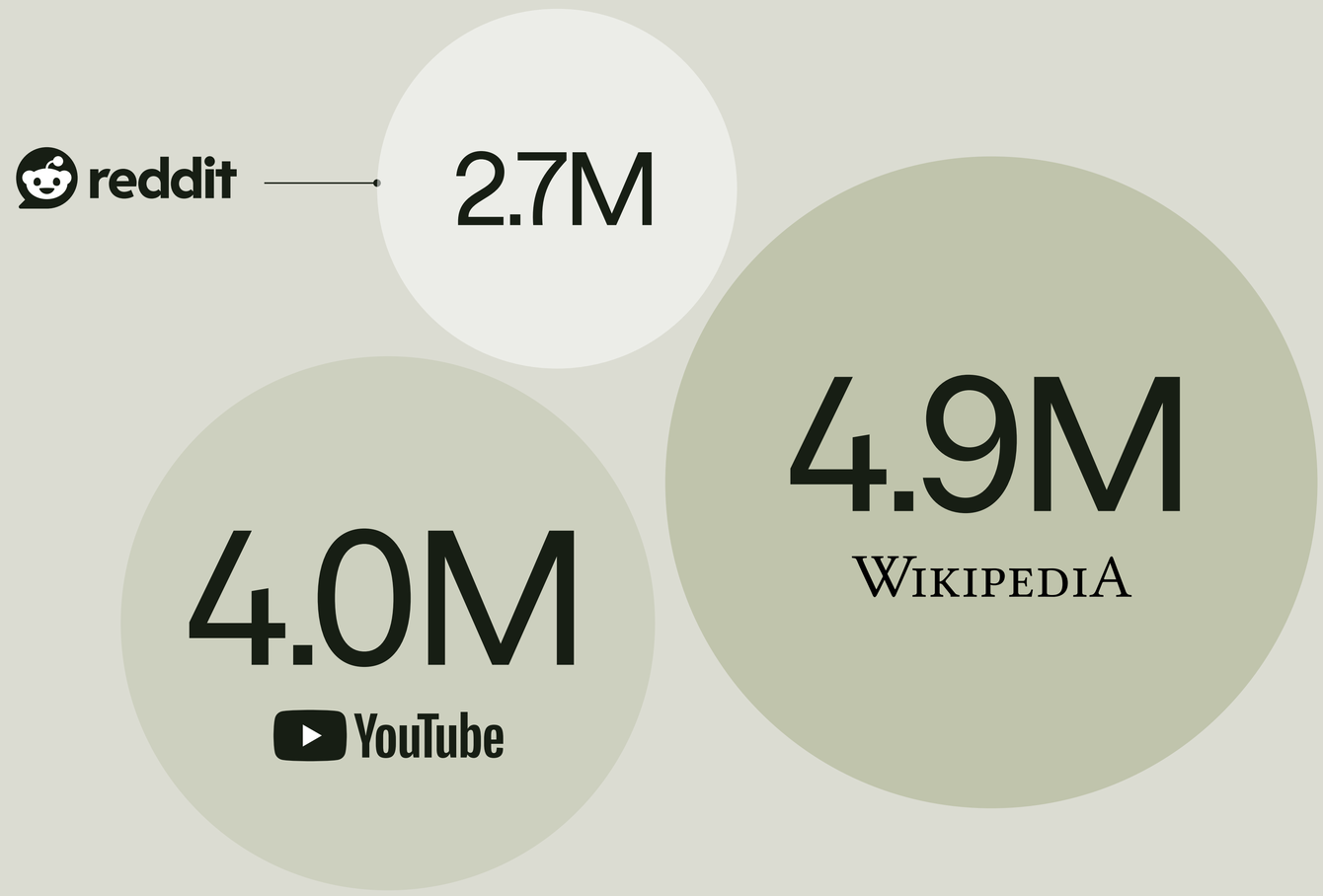
Gemini is a multi-modal AI assistant integrated across Google's product surfaces. Users access through Google's apps and devices rather than as a standalone destination.

Top brands

Google appears prominently on its own platform, consistent with Gemini's integration across Google's product surfaces. Beneath that, brands are very commerce-oriented: Amazon, eBay, Walmart and Etsy are all in the top eight.

Top citation sources

Wikipedia (4.9M), YouTube (4.0M), Reddit (2.7M). Gemini has the smallest source pool of any platform in absolute terms.



Character

Google-anchored and commerce-leaning. Both reflect Gemini's deep integration with Google properties, like Google Shopping and product comparison surfaces.

Strategic implication

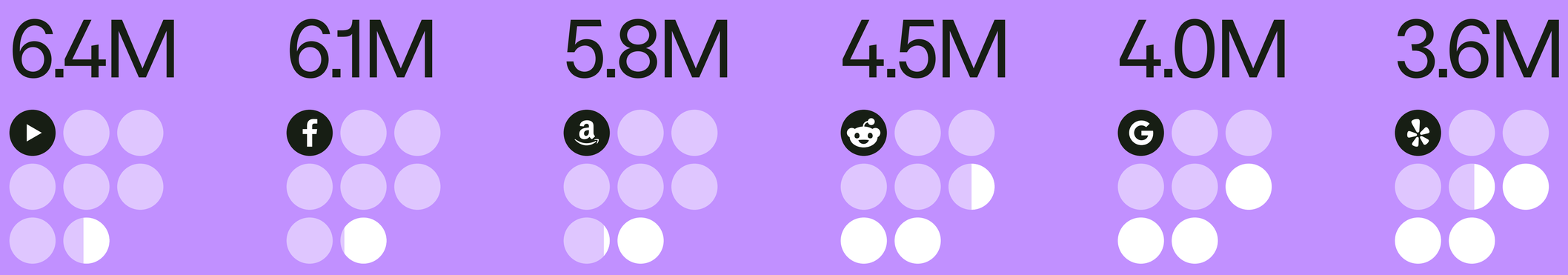
The brand-Google relationship matters more here than on any other platform. Brands competing in Google's adjacency (commerce platforms, productivity tools, advertising platforms) face greater challenges for visibility. Brands with an active, optimized Google Shopping presence should achieve correspondingly higher Gemini visibility.

Google AI Mode

AI Mode acts as the conversational model embedded inside Google search. It's the most-used Google AI surface for genuine search intent (as opposed to Gemini's broader assistant context).

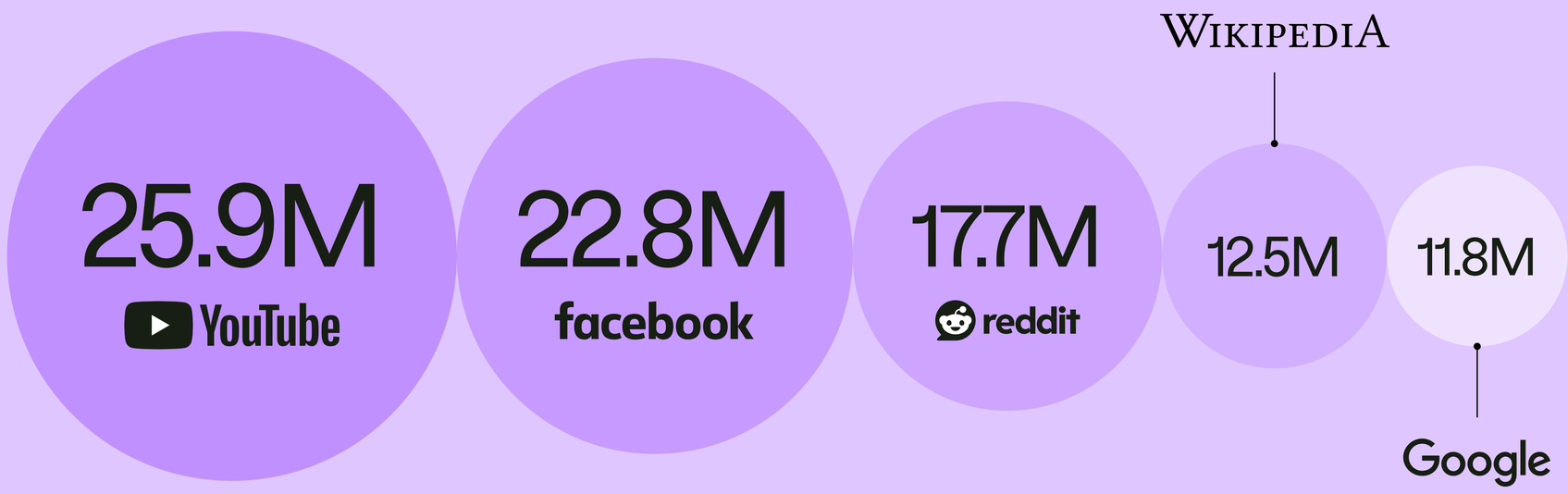
Top brands

YouTube (6.4M), Facebook (6.1M), Amazon (5.8M), Reddit (4.5M), Google (4.0M), Yelp (3.6M). Yelp's prominence is the signature — no other platform surfaces a local-discovery brand this high.



Top citation sources

YouTube (25.9M), Facebook (22.8M), Reddit (17.7M), Wikipedia (12.5M), Google (11.8M). Heavily social-platform weighted.



Character

Social-weighted, reading social platforms as authoritative for current and conversational content.
Also local-discovery-oriented due to Google Search's broader strength in local intent queries.

Strategic implication

Local-business categories see strong visibility through Yelp, Google Business Profile and social profiles.
For local and service-based businesses, AI Mode is where investment pays back hardest.

Google AI Overviews

AI Overviews are AI-generated answers featured above Google organic search results. It's the most-seen AI response for the average user because there's no opt-in. This is why its mention and citation volumes are the largest in our dataset.

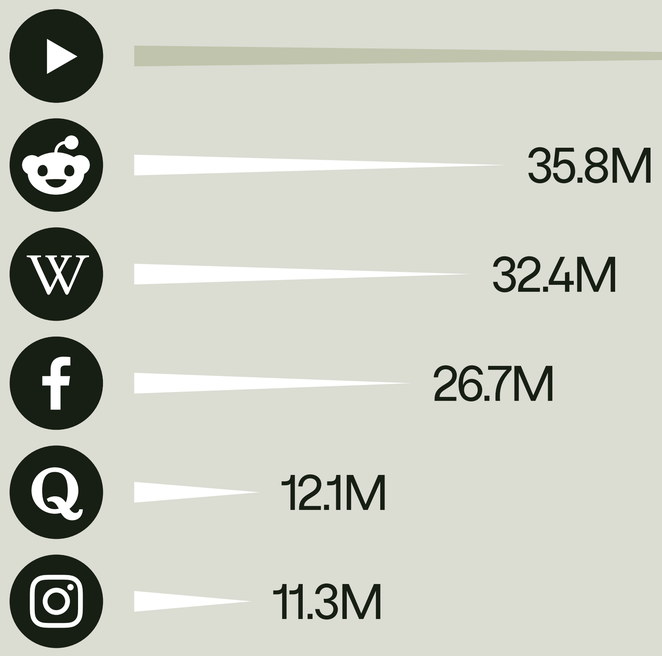
Top brands

YouTube dominates at 35.2M, more than twice the next brand (Reddit at 15.2M). Wikipedia in the top three. Quora also sits in the top ten, the only platform where it appears that high.



Top citation sources

YouTube leads by a wide margin at 83.2M. Behind it, the picture is social and community-led: Reddit (35.8M), Wikipedia (32.4M), Facebook (26.7M), Quora (12.1M) and Instagram (11.3M). Authoritative health sources sit lower down (NIH 10.0M, Cleveland Clinic 8.6M, Healthline 5.3M), driven mostly by health queries.



Character

Video dominant and authority-weighted. Outside of YouTube, AI Overviews feature established sources (Wikipedia, Quora, NIH, Cleveland Clinic).

Strategic implication

Video content matters more than anywhere else. A brand without YouTube presence faces a structural disadvantage that doesn't exist on the other three platforms. Health, education and reference-anchored categories also see disproportionately strong AI Overviews visibility.

Citation density: How many sources each LLM cites per response

The average number of sources cited per AI response varies sharply across platforms, according to our database:

15.4 sources
per response (most citation-heavy)

ChatGPT

Google AI Mode

11.4 sources
per response

9.2 sources
per response

Google AI Overviews

Gemini

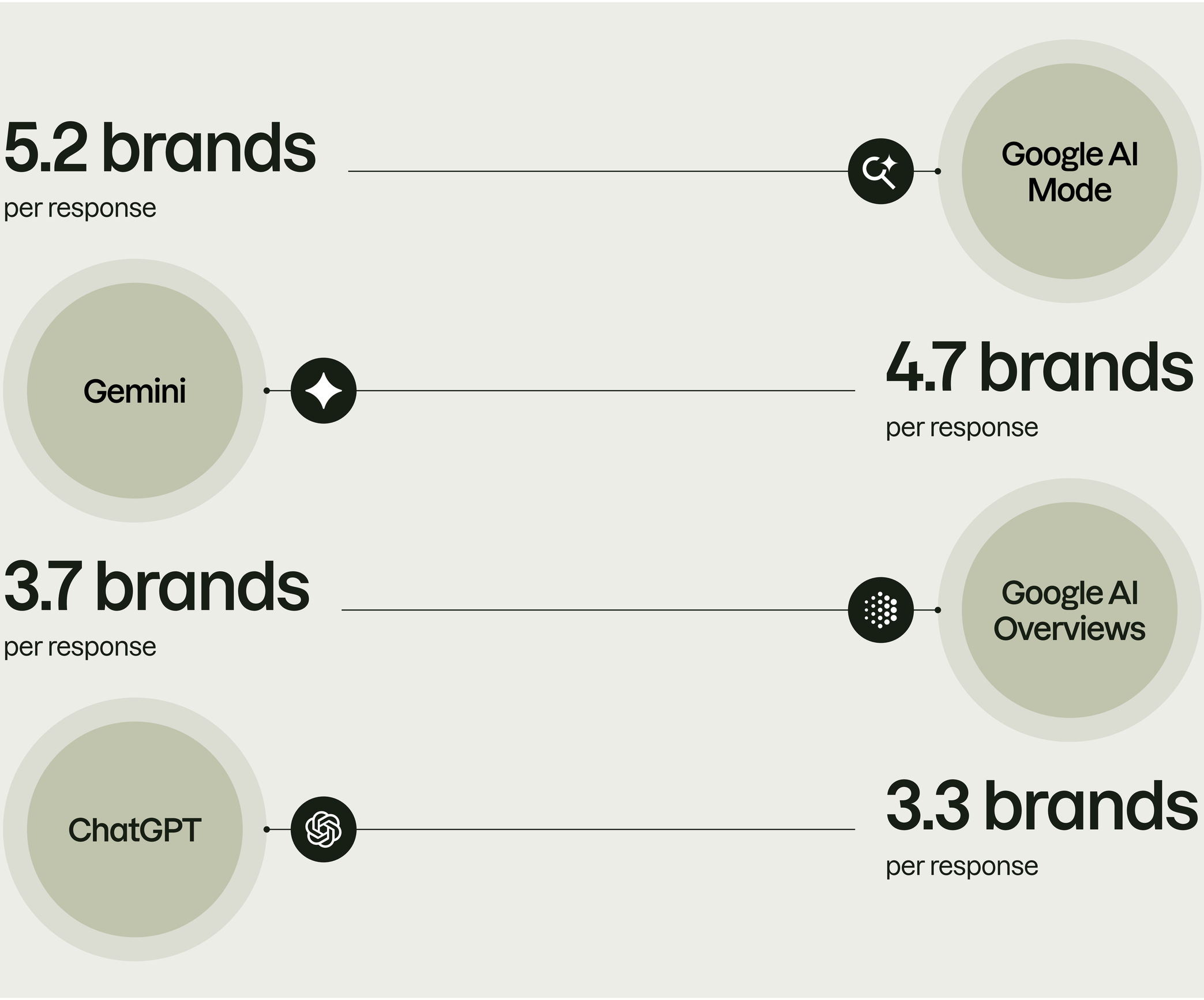
3.3 sources
per response (most citation-light)

The takeaway:

The visibility of sources varies greatly across platforms. ChatGPT pulls from more than four times as many sources as Gemini for the same query.

Mention density: How many brands each LLM names per response

Across the same April 2026 dataset, brand mentions per AI response also vary by platform, though the pattern differs from citation density:

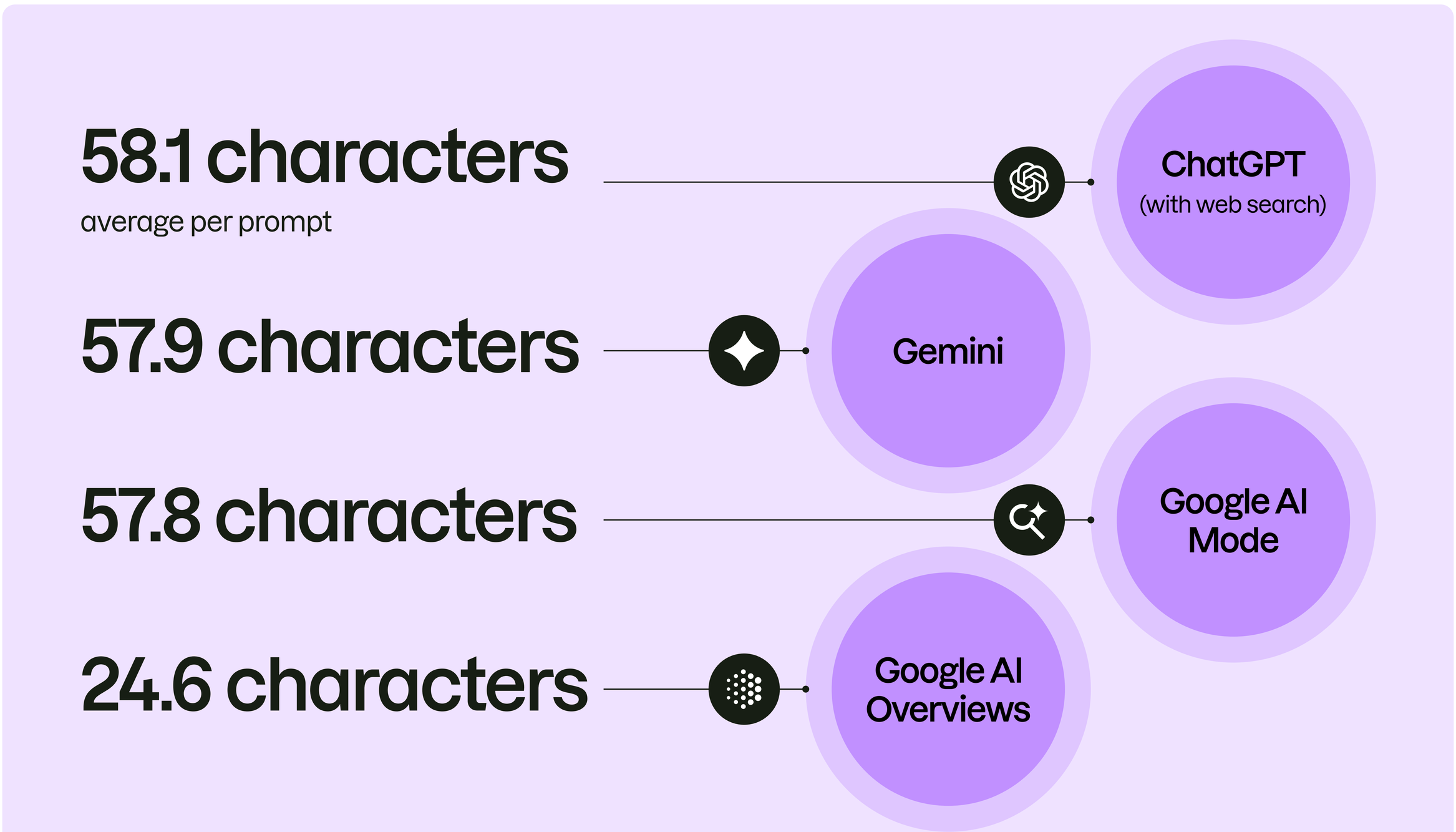


The takeaway:

Google AI Mode names the most brands per response at ~58% more than ChatGPT. This differs from citation density, where ChatGPT leads and Gemini trails. Each platform has its own mention-to-citation balance, calibrate your expectations and brand visibility strategy to reflect this.

Prompt length: Why Google AI Overviews answers differently

A structural reason underpins the citation and mention density variance. The average query that Google AI Overviews receives is much shorter:



This is because they come from Google Search keywords and behavior rather than conversational AI inputs. Shorter prompts return shorter answers with fewer cited sources, partially explaining AI Overviews' lower citation density.

Key takeaway:

Any visibility strategy geared towards AI Overviews should be anchored to short, intent-driven queries, whereas other platforms act more like conversational discovery.

Platform concentration: The brands defined by one LLM

For some brands, mentions concentrate so heavily on one platform that the platform's behavior becomes their AI presence. A few cases stood out in our data:

86%

Cleveland Clinic

86% of all AI mentions on Google AI Overviews alone. If AI Overviews shifts its health-source weighting, the vast majority of Cleveland Clinic's AI visibility could move with it.

704K

Yelp

704K mentions were on Google AI Mode — nearly half its total AI presence on one platform. The biggest single-platform mention volume in our sample.

3.4%

Home Depot (the inverse)

Mentions spread within 3.4% across all platforms (199K / 192K / 183K / 173K). The most evenly distributed brand of the brands we examined.

Cross-platform concentration is a risk profile. Brands above 70% concentration on a single platform have most of their AI visibility exposed to one algorithm's behavior. An AI visibility audit should always start with the question: what platforms drive your AI visibility?

Chapter 6

How the two halves of AI visibility work, and why winning one doesn't mean winning the other.

Visibility vs citation

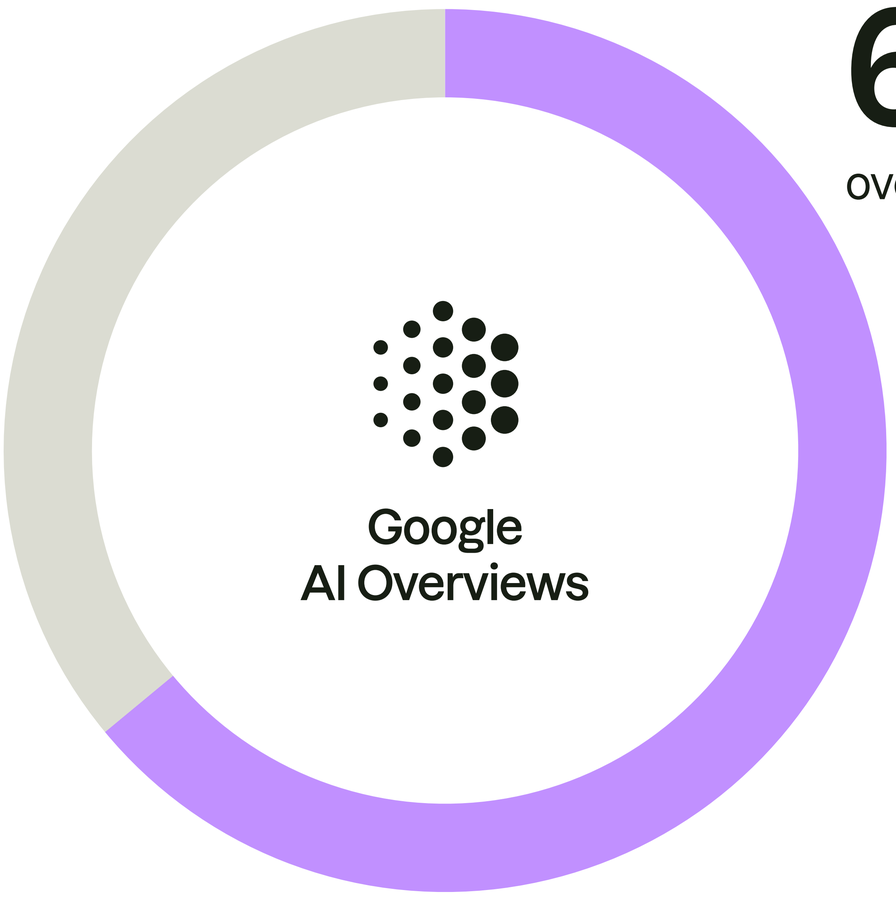
Mentions are driven by how often a brand is included in responses, driven by brand authority and category fit. Citations are driven by which websites AI quotes from when constructing those answers, driven by content depth and third-party citation infrastructure.

The two also pay off differently. A citation carries a link, so it can send a click and measurable referral traffic. A mention names the brand inside the answer the reader sees but carries no link, so it builds awareness and consideration rather than a direct visit. That makes mentions the more visible of the two, since they sit in the answer itself. While citations sit inside a list of linked sources, they carry the more directly trackable action.

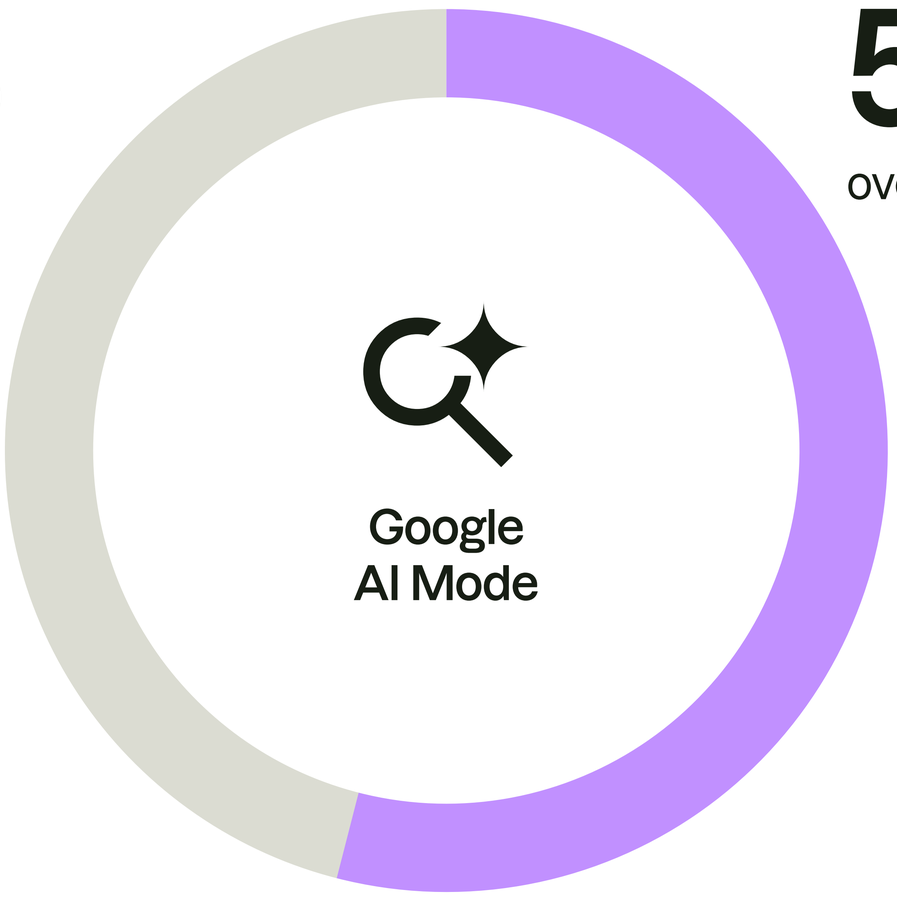
Some brands win one and lose the other. Patagonia is heavily mentioned but lightly cited, so it owns the conversation without depending on clicks from its own pages. Wikipedia is the reverse, heavily cited but rarely the brand AI is discussing, feeding answers about everyone else.

The mention-source overlap by platform

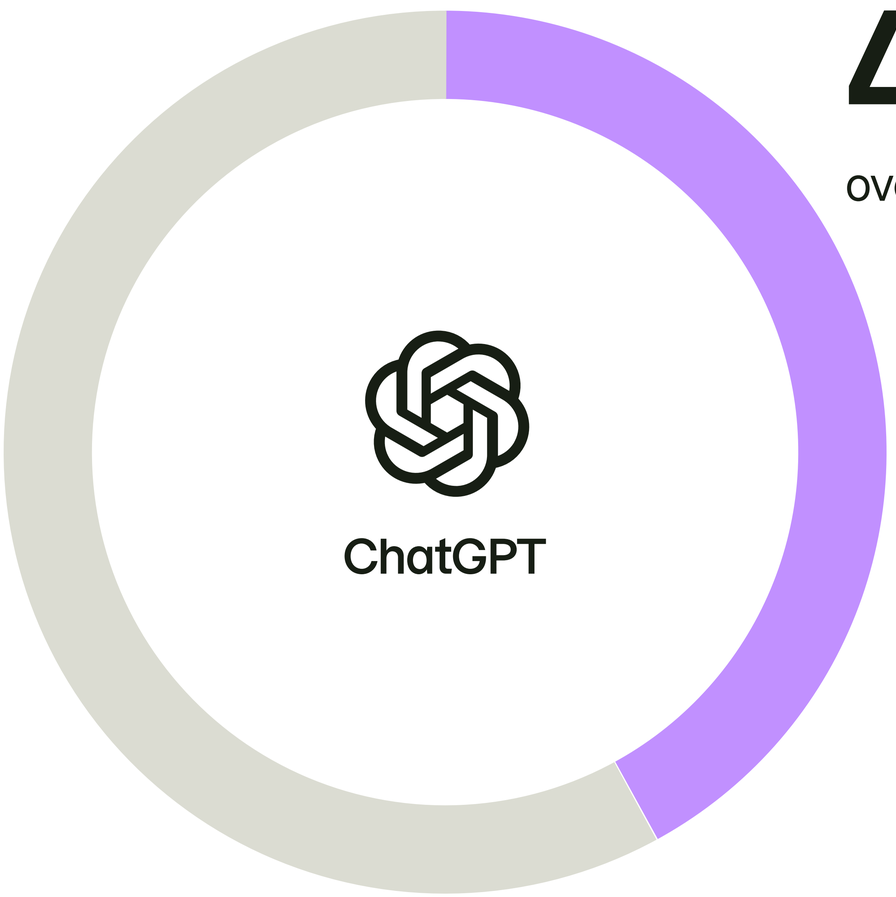
Of the brands AI mentions, how many are also brands AI cites as sources? Averaged across Jan-April 2026:



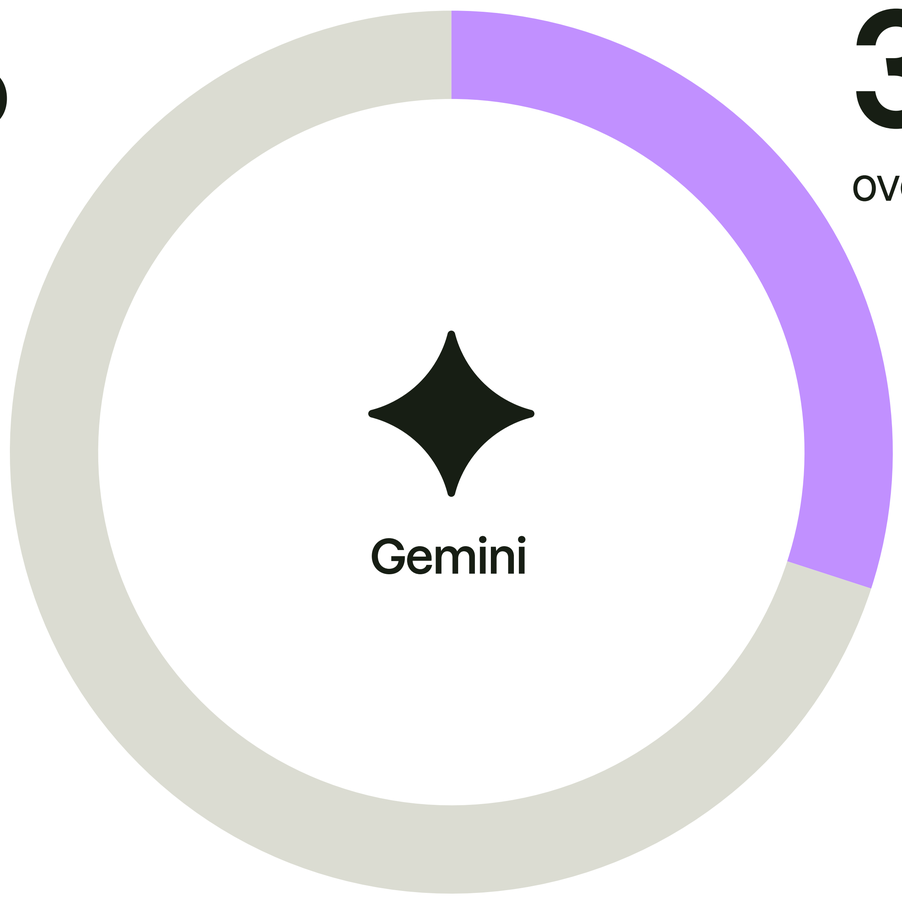
64%
overlap



54%
overlap



42%
overlap



30%
overlap

A 34 percentage point gap between the highest and lowest. Interestingly, both are Google platforms.
On AI Overviews, most of the brands AI talks about are also brands being quoted. AI visibility often moves together.

On Gemini, they're largely separate groups. Strategy that wins citations on one platform does not necessarily win mentions, and certainly does not transfer across platforms.

The Source Surplus

The Source Surplus is the gap between how often AI cites a website and how often it mentions that same website's brand. Sites with a high surplus have become infrastructure for the answers AI gives about everyone else.

Top Source Surplus brands (citation / mention ratio)

Medical News Today

Ratio: 4.6x

Volume:
3.3M citations
712K mentions

Wikipedia

Ratio: 4.3x

Volume:
56.8M citations
13.2M mentions

Healthline

Ratio: 4.2x

Volume:
7.1M citations
1.7M mentions

WebMD

Ratio: 4.0x

Volume:
4.8M citations
1.2M mentions

Yahoo

Ratio: 4.0x

Volume:
7.1M citations
1.8M mentions

IMDb

Ratio: 3.9x

Volume:
10.1M citations
2.6M mentions

Fandom

Ratio: 3.9x

Volume:
9.7M citations
2.5M mentions

Cleveland Clinic

Ratio: 3.8x

Volume:
8.6M citations
2.3M mentions

NIH

Ratio: 3.7x

Volume:
11.1M citations
3.0M mentions

TripAdvisor

Ratio: 3.7x

Volume:
12.3M citations
3.4M mentions

Quora

Ratio: 3.5x

Volume:
15.1M citations
4.4M mentions

Every brand on this list is heavily used by AI to construct answers. Three categories dominate: reference platforms (Wikipedia, Quora, Fandom, IMDb), health authorities (Medical News Today, Healthline, WebMD, Cleveland Clinic, NIH), and travel/discovery (TripAdvisor). Each owns a content niche AI defaults to for information.

A note on the list: some sources here are cross-vertical authorities (Wikipedia, Yahoo) while others are category-specific reference platforms with deep authority in one or two verticals (Fandom for franchise content, IMDb for film, Healthline and WebMD for health). The Source Surplus mechanism is the same in both cases, but the strategic implication differs by category.

First-party vs third-party citation balance

Brands differ widely in how much of their AI citation presence comes from their own domain versus third-party sources. Some are cited mostly from their own pages. Others appear in AI answers far more as mentions, leaning on third-party coverage (review sites, community platforms, category publications).

The vast majority of brands sit between the two. Owned content and third-party presence work together, and the balance that wins shifts by brand and by query.



Case study: Patagonia

The cleanest example of employing a consistent brand narrative across third-party sources in our entire dataset. Patagonia has built a brand people relate to and, because of its business model, can focus on being known rather than owning the final transaction.

Headline numbers

Total mentions

87,000

across AI platforms

Total cited pages

8,300

unique pages

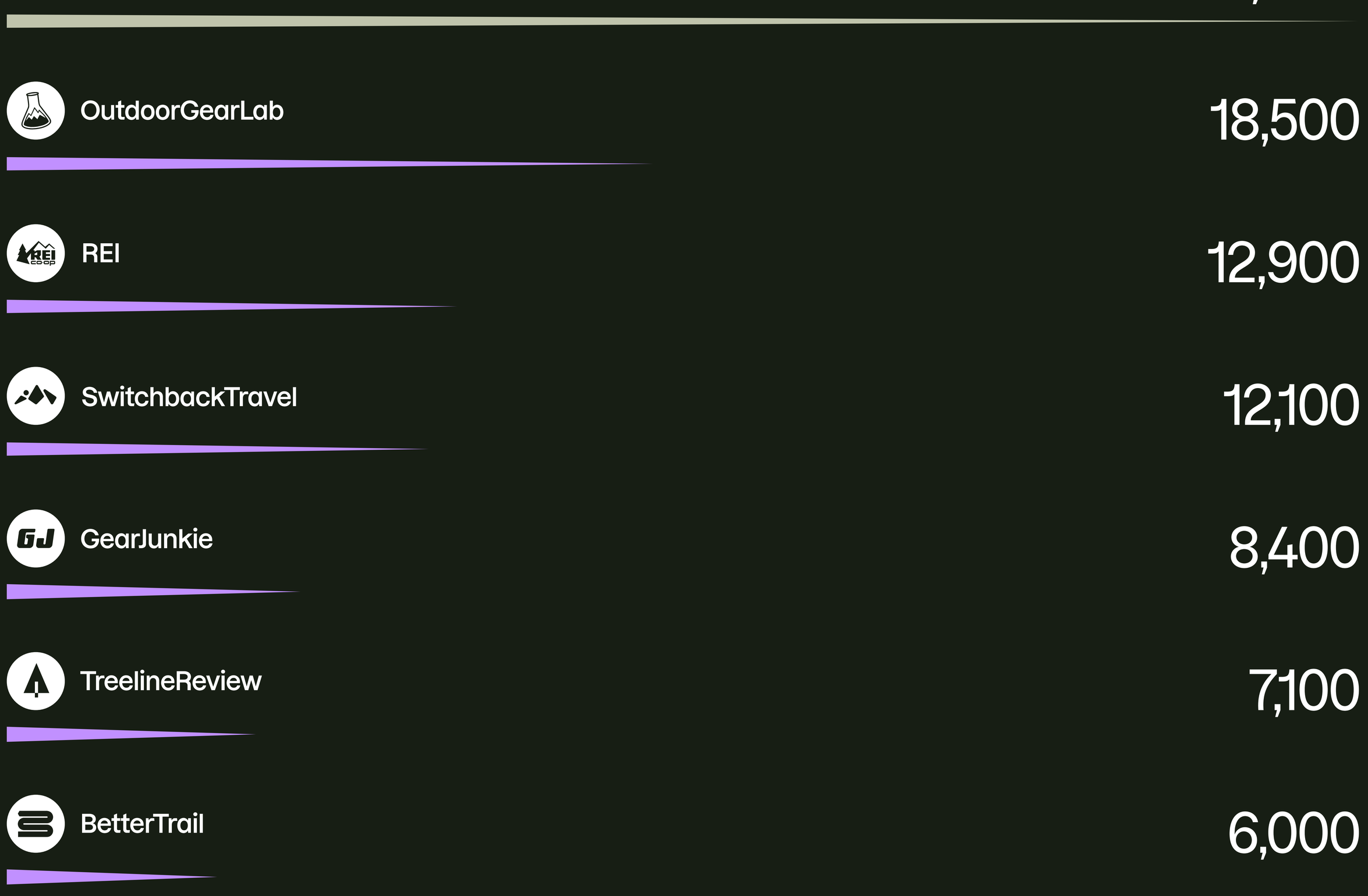
Google AI Overviews	87
Overall	79
Gemini	78
ChatGPT	76
Google AI Mode	76

Patagonia is the picture of consistency with an overall AI Visibility score that's held at 79 or 80 across the analyzed January to April window.

The mechanism

Reddit and specialist outdoor-gear review sites form an incredible Citation Core. Together, the six specialist sites account for over 65,000 brand mentions, more than the entire Tier 1 traditional media combined:

Mentions



The lesson

Patagonia didn’t get there through paid media, content volume or SEO, even though its on-domain footprint is strong. What it built, over years, was a brand-led ecosystem in which gear-review communities and outdoor publications speak about the brand with consistent vocabulary.

The third-party sources AI quotes tell one consistent story, and this is funneled into AI responses. That’s why Patagonia’s AI visibility stays high month after month.

***Data note:** headline metrics here are US-based, while the source analysis draws on worldwide data to give the fullest infrastructure picture.

Case study: Shopify

Shopify is another case that represents consistent AI visibility. It's built this consistency through three layers that contribute to both mentions and citations.

Headline numbers

Total mentions

147,000

across AI platforms

Total cited pages

42,100

unique pages

Google AI Mode	86
Google AI Overviews	84
Overall	81
Gemini	78
ChatGPT	75

Across the analytical window, Shopify's overall AI Visibility score has held perfectly flat at 81 in every single month, with Google AI Mode and AI Overviews at near-identical visibility.

Balanced mentions and citations on AI Overviews

On Google AI Overviews specifically, Shopify was mentioned 45,098 times and cited 46,342 times in April 2026. Almost identical. This indicates strong AI visibility that's compounded over time. This balance is rare, most brands skew one way (more mentioned than cited, like Patagonia, or more cited than mentioned, like Wikipedia).

45,098 mentioned (times)

46,342 cited (times)

Three layers running in parallel

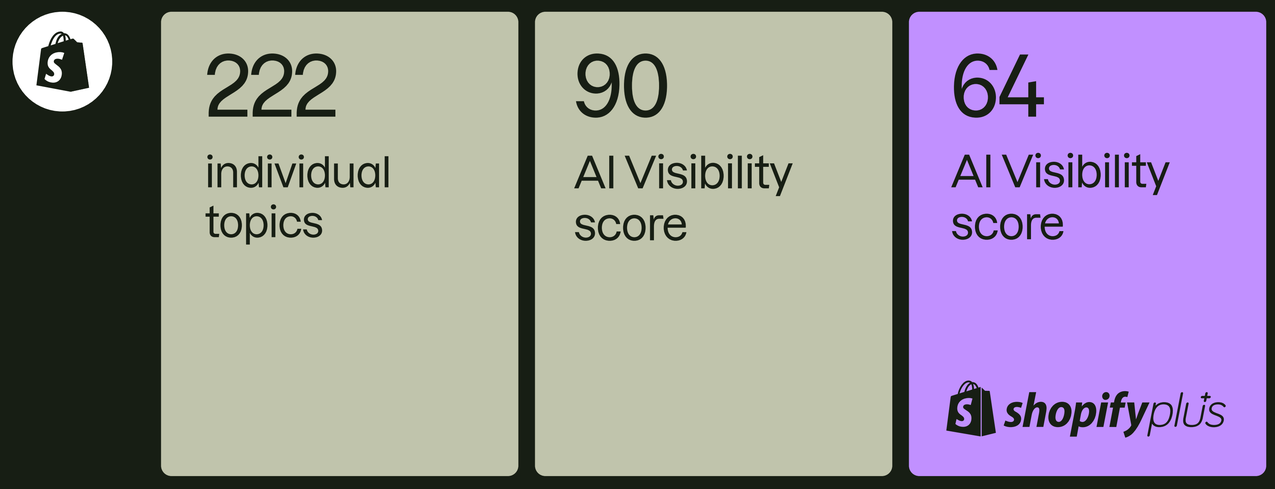
Specialist software-review platforms

G2 ranks #5 in Shopify's ChatGPT citation mix (1,124 mentions), Capterra ranks #8 (808). The two most authoritative software review platforms produce meaningful lift for Shopify here.



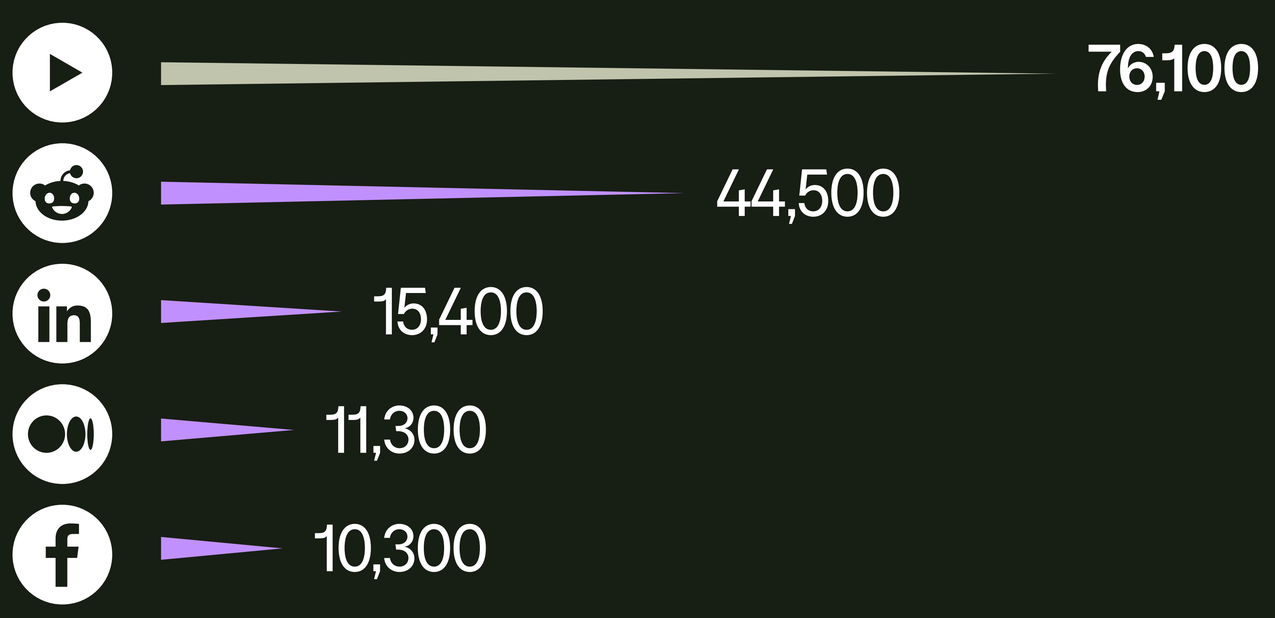
Topic and sub-brand authority

Extensive documentation that answers real user questions means that Shopify has 222 individual topics where its AI Visibility score exceeds 90, spread across help, admin, billing, payments, themes and apps. Shopify Plus even has an AI Visibility score of 64 as a distinct entity.



Long tail of community sources

Citations across YouTube (76,100), Reddit (44,500), LinkedIn (15,400), Medium (11,300), Facebook (10,300) means that no single source carries Shopify's visibility alone.



Shopify has also built out a sustainable brand ecosystem across specialist-review platforms, topic-level owned content, and community presence. Its mix of first-party and third-party sources makes for strong AI visibility.

***Data note:** headline metrics here are US-based, while the source analysis draws on worldwide data to give the fullest infrastructure picture.

Chapter 7

Three deep dives plus scorecards across the remaining 19 verticals.

Category Spotlights

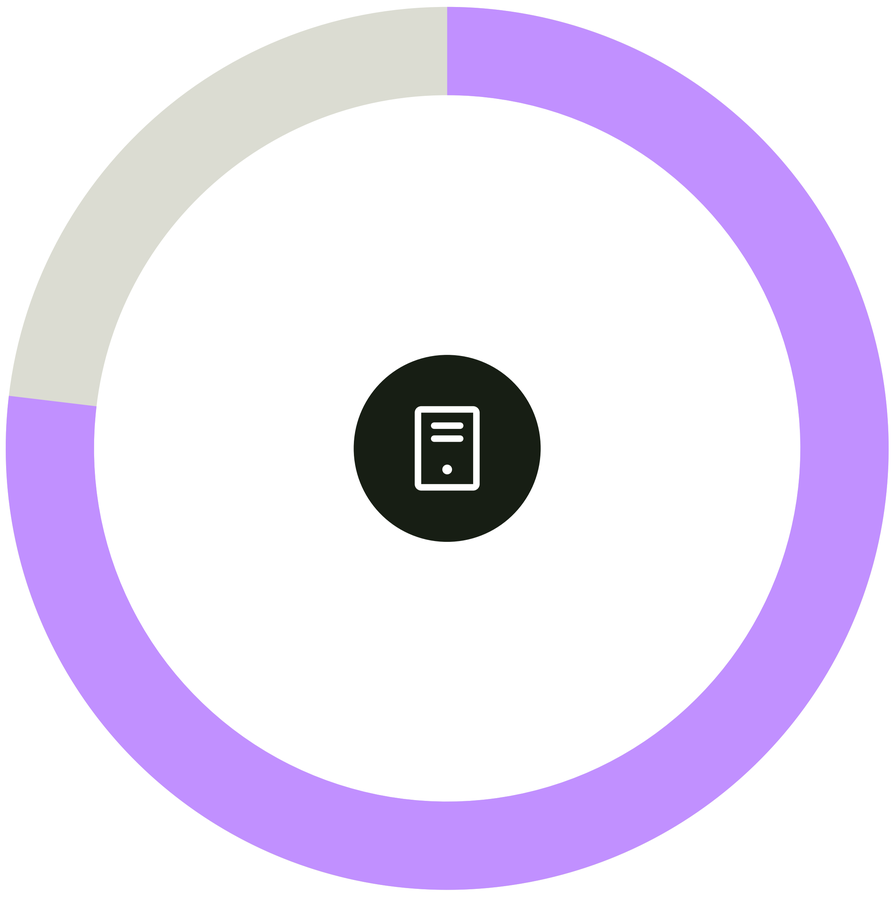
The category data in this chapter is drawn from the US AI search prompt database. The dynamics described (concentration, top brands, citation infrastructure) apply globally, though the specific brand and source names will shift by region.

We explore three categories in depth: Consumer Electronics near the concentrated end, Finance at the flat end, and Digital Tech & Software in the middle, with the highest absolute mention volumes. Between them, they describe most patterns visible in any vertical.

Deep dive: Consumer Electronics

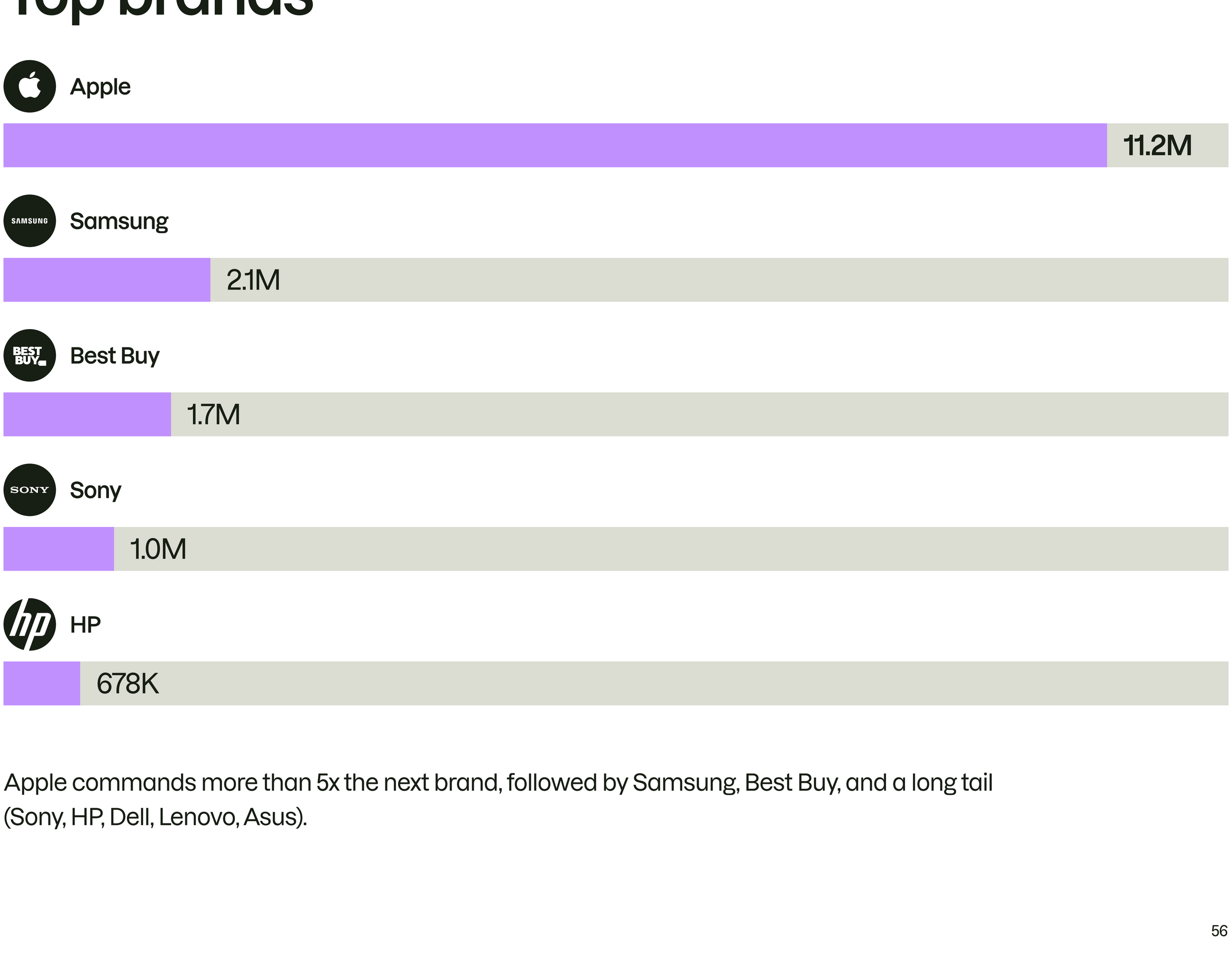
Concentration

76.9%



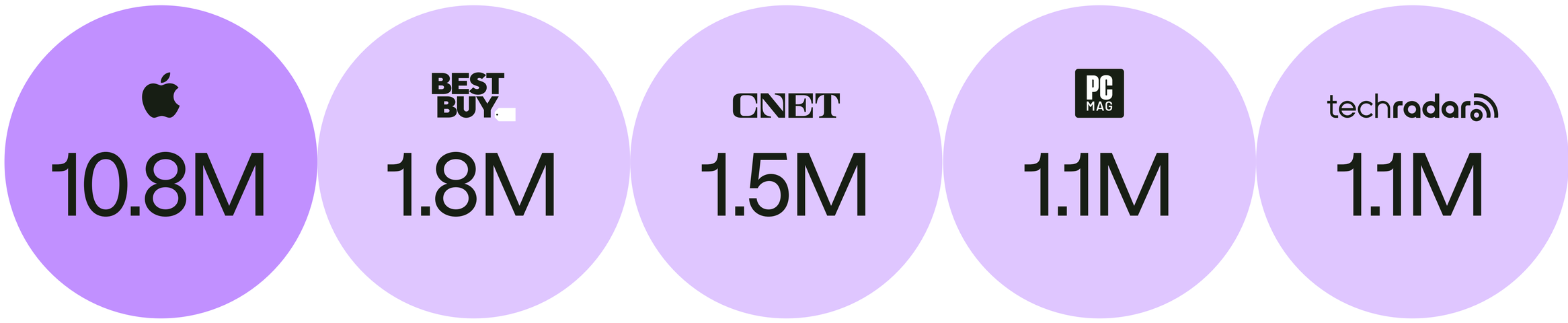
(second most concentrated of the 22 verticals).
The cleanest single-brand domination example in the dataset.

Top brands



Apple commands more than 5x the next brand, followed by Samsung, Best Buy, and a long tail (Sony, HP, Dell, Lenovo, Asus).

Top sources (Citations — brand-as-source)



After Apple's own domain, tech-specialist publications carry the review and comparison load. Traditional business publishers are noticeably absent, providing further evidence that category-specific domains should be prioritized in your strategy.

What this category demands

For brands competing here who are not Apple or Samsung, displacement at the top is essentially impossible. Realistic ambition starts at position 4, which requires a massive presence on CNET, PCMag, TechRadar and specialist comparison sites. Apple's 10.8M own-domain citations show what owning category authority through content infrastructure looks like at scale.

Sub-brand depth: a new dimension of AI brand maturity

Enterprise AIO's granular analysis on Apple reveals something unique: AI recognizes Apple at multiple levels of brand depth. Eighteen Apple sub-brands register at least 1% of the main brand's total mentions: Apple Music (263K, 20% of main brand), Apple TV (260K, 20%), iPhone (143K, 11%), Apple Maps (124K, 9%), iOS (74K, 6%), App Store (69K, 5%), plus twelve more.

For comparison: Patagonia and Shopify have zero sub-brands at this threshold. Cleveland Clinic has one. Apple stands alone.

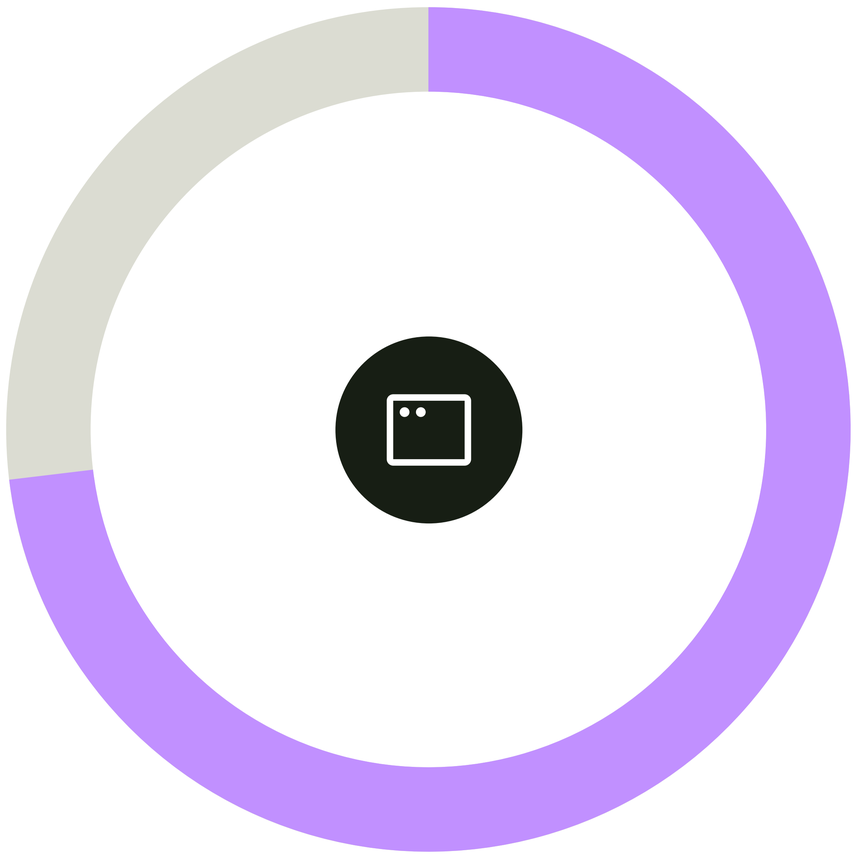
The takeaway:

If you have distinct product lines you want AI to surface independently, cultivate each as a named entity in AI's training data. through consistent naming, dedicated content properties, and targeted third-party coverage of the sub-brand.

Deep dive: Digital Technology & Software

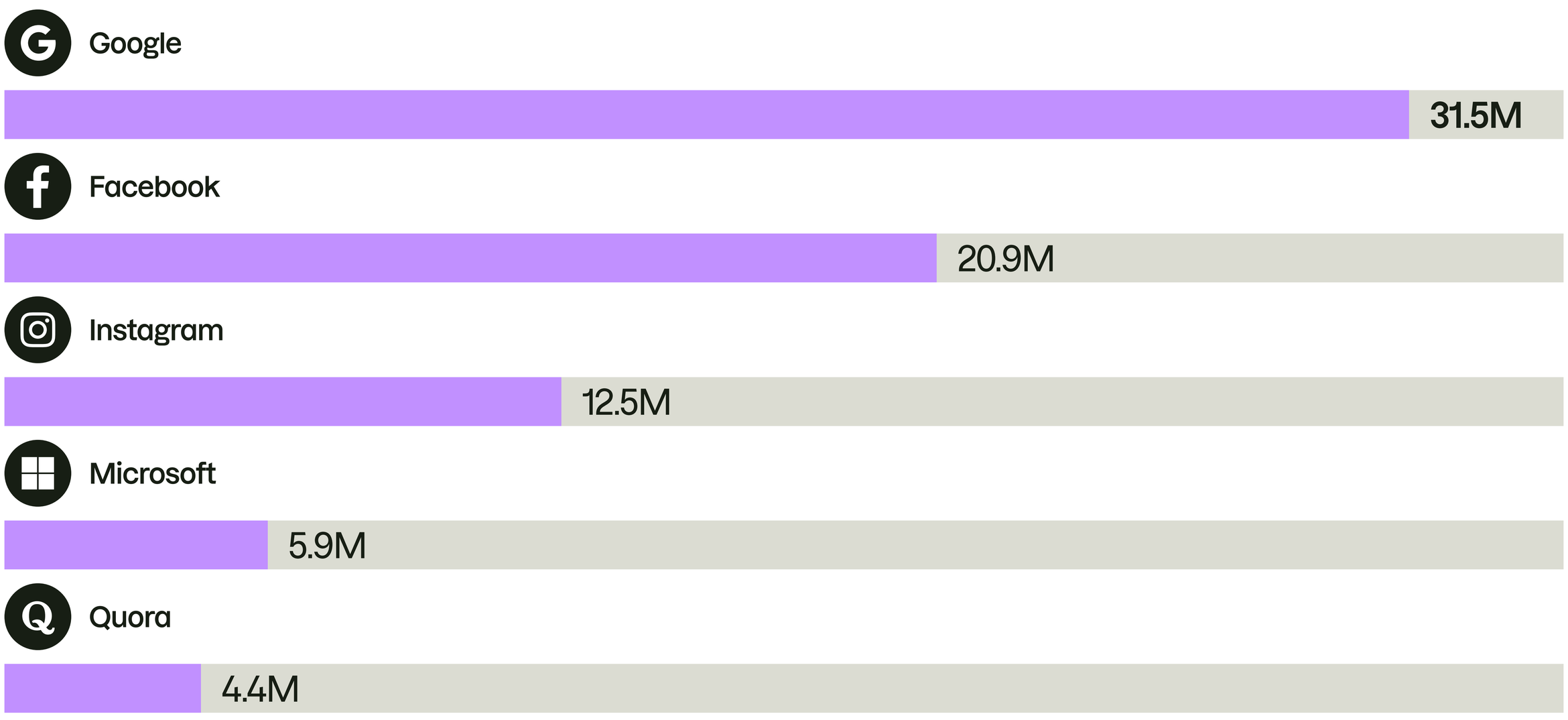
Concentration

73.1%



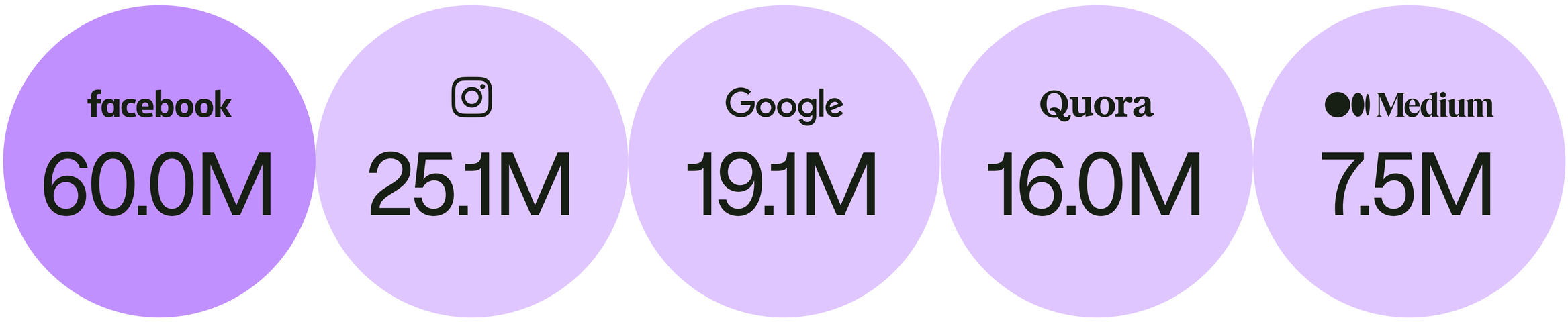
Highest absolute mention volumes of any vertical.

Top brands



Platform brands rather than software companies in the traditional sense. Google + Facebook + Instagram together account for over 64M mentions across our data, a volume that dwarfs every other category.

Top sources



AI builds answers about technology topics by quoting from Facebook and Instagram pages at scale no other category approaches. This is also one of the few categories where Quora appears this high.

What this category demands

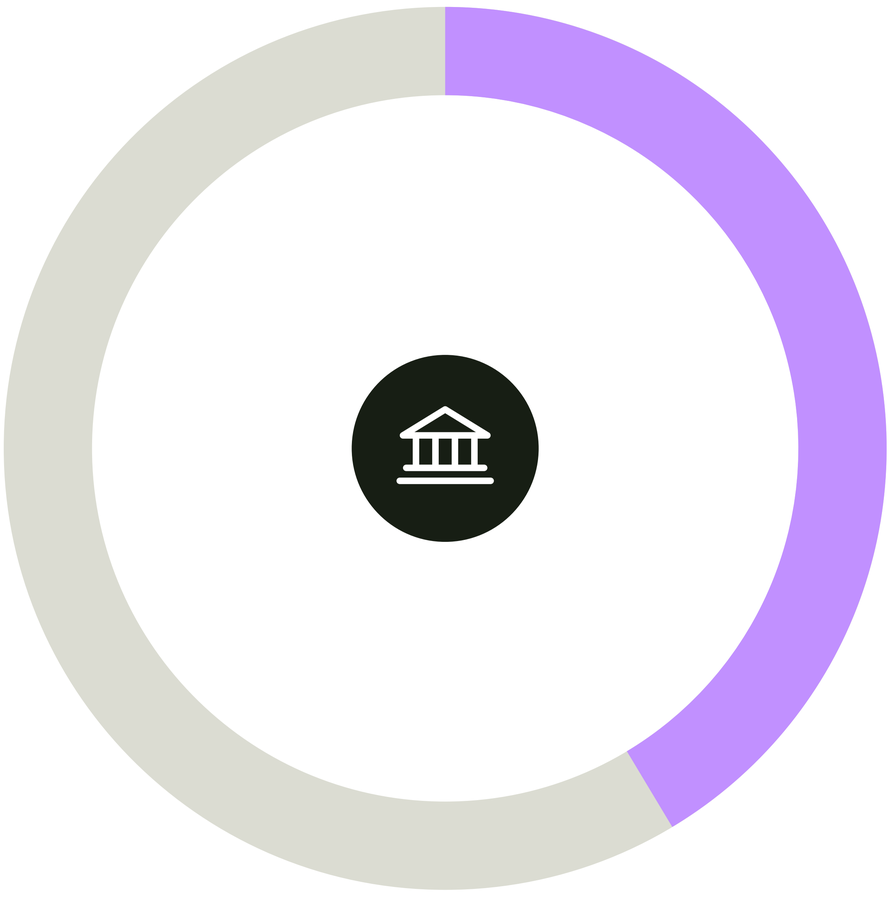
For software brands, the challenge is that AI is heavily oriented to consumer-platform brands. Enterprise software brands need to break through via category-specific content and presence on Quora, Reddit and Wikipedia, plus the G2/Capterra layer (most prominent on ChatGPT) which carries B2B software authority. Our Shopify case study in Chapter 6 shows what successful execution looks like.



Deep dive: Finance

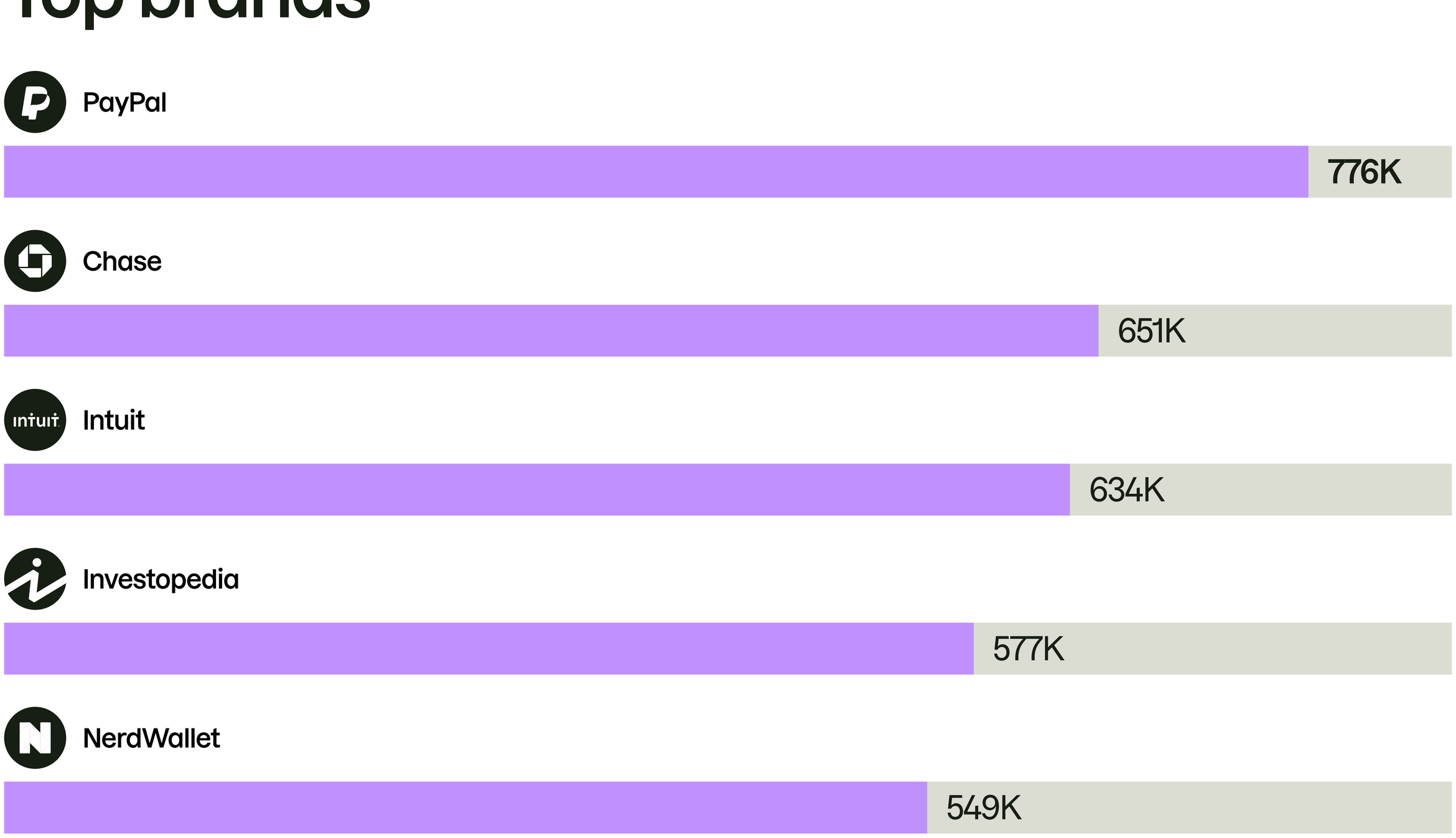
Concentration

41.4%



(flattest of the 22 verticals). The most open category for new brand entry.

Top brands



There's no single dominator. The only vertical where the top five sit within 30% of each other on mention volume.

Top sources

Investopedia
2.1M

nerdwallet
1.7M

Bankrate
1.1M

Investing.com
533K

INTUIT
508K

The brands AI quotes from for finance answers are education and comparison specialists. Investopedia leads with over 2M citations. The Source Surplus pattern is strong in this category: financial education sites are citation infrastructure but rarely mentioned by name.

What this category demands

The flat concentration creates real opportunity. Focused investment can move a strong brand into the top 10 within a quarter. The lever is Source Surplus presence: ensuring representation on Investopedia, NerdWallet and Bankrate is accurate, current and aligned with the brand's positioning. These three sites do disproportionate work as sources.

NerdWallet's overall AI Visibility score is 59, with mentions strongly concentrated on AI Overviews (53.2K of 62K total). This leaves it somewhat exposed in relying on one platform for 85%+ of brand mentions.



Scorecards: Remaining 19 verticals

Each scorecard gives the concentration percentage as a competitiveness indicator, a top three mentioned brands, top three citation sources, and a quick read.

Arts & Entertainment

Concentration: 71.0%

Read: YouTube absolutely dominates both lists. Fandom and IMDb do specialist-database citation work for franchise queries.

Top mentions:

YouTube	47.9M
TikTok	6.9M
Netflix	4.3M

Top sources:

YouTube	122.0M
Fandom	16.4M
IMDb	10.1M

Automotive & Vehicles

Concentration: 48.1%

Read: Established automakers dominate mentions; specialist auto-review sites dominate citations. Edmunds and KBB are the biggest citation levers.

Top mentions:

Ford	2.7M
Toyota	2.1M
Chevrolet	1.9M

Top sources:

Edmunds	1.8M
KBB	1.8M
Cars.com	1.4M

Beauty & Cosmetics

Concentration: 53.4%

Read: Splits between retailers (mention side) and editorial specialists (citation side). Editorial citation drives how AI describes brands.

Top mentions:

Ulta	602K
Sephora	556K
CeraVe	225K

Top sources:

Allure	917K
Byrdie	740K
Glamour	605K

Business & Professional Services

Concentration: 61.1%

Read: Job and credentialing platforms dominate both lists. LinkedIn is genuinely dual-list balanced.

Top mentions:

LinkedIn	2.9M
BBB	2.6M
Indeed	2.6M

Top sources:

LinkedIn	8.2M
Indeed	6.3M
BBB	4.5M

Ecommerce & Retail

Concentration: 69.9%

Read: The cleanest dual-list balance category in the dataset. Same brands win both lists.

Top mentions:

Amazon	19.2M
eBay	11.1M
Walmart	10.0M

Top sources:

Amazon	18.4M
eBay	10.2M
Walmart	9.1M

Education & Training

Concentration: 59.4%

Read: Wikipedia dominates both lists by a factor of five. Reference dominance is structural here.

Top mentions:

Wikipedia	13.5M
Britannica	1.8M
Merriam-Webster	1.4M

Top sources:

Wikipedia	71.7M
Britannica	7.0M
ScienceDirect	5.7M

Fashion & Apparel

Concentration: 58.8%

Read: Athletic brands lead mentions; editorial publishers lead citations. Brand-editorial relationship is the single biggest lever. Category leader Nike's strongest platform is Gemini.

Top mentions:

Nike	2.2M
Poshmark	1.4M
Adidas	1.0M

Top sources:

Vogue	1.2M
Poshmark	951K
WhoWhatWear	757K

Food & Drinks

Concentration: 63.1%

Read: Yelp dominates massively. Delivery platforms hold the second tier. AI Mode is Yelp's dominant platform (704K mentions, ~half of total).

Top mentions:

Yelp	7.6M
UberEats	1.7M
DoorDash	1.6M

Top sources:

Yelp	16.0M
UberEats	2.3M
Restaurantji	1.6M

Gaming

Concentration: 44.9%

Read: Console makers lead mentions; gaming-press specialists lead citations. Relatively flat, space for emerging brands.

Top mentions:

Nintendo	1.5M
Pokemon	982K
PlayStation	976K

Top sources:

IGN	1.6M
GameSpot	1.6M
Steam Community	1.3M

Government & Public Sector

Concentration: 44.8%

Read: US federal agencies dominate both lists. The .gov domain authority is structural.

Top mentions:

NIH	3.4M
FDA	2.1M
USDA	1.5M

Top sources:

NIH	15.8M
CDC	2.4M
CA.gov	2.4M

Health & Fitness

Concentration: 51.6%

Read: The most consistent dual-list category. Cleveland Clinic has 86% of mentions on AI Overview alone, the most platform-concentrated brand in our sample.

Top mentions:

Cleveland Clinic	2.5M
Mayo Clinic	2.2M
Healthline	1.9M

Top sources:

Cleveland Clinic	10.0M
Healthline	9.6M
Mayo Clinic	7.3M

Hobbies & Leisure

Concentration: 46.3%

Read: Toy and craft brands lead mentions; how-to communities lead citations. Mentions and citations diverge sharply.

Top mentions:

LEGO	861K
Michaels	642K
Mattel	627K

Top sources:

Instructables	1.0M
The Knot	826K
AllTrails	618K

Home & Garden

Concentration: 62.0%

Read: Big-box retailers dominate; Angi's service-listing infrastructure holds a meaningful citation share. Home Depot has the most evenly distributed cross-platform profile in our sample.

Top mentions:

Home Depot	3.1M
Lowe's	1.5M
Wayfair	968K

Top sources:

Home Depot	2.8M
Angi	1.9M
Lowe's	1.8M

Industrial

Concentration: 42.2%

Read: Lower absolute volumes than consumer categories. AI currently underweights B2B industrial queries, expect this category to shift fastest as B2B AI search adoption grows.

Top mentions:

Boeing	466K
3M	448K
Deere	423K

Top sources:

Made-in-China.com	198K
Vevor	176K
Thermo Fisher	157K

News & Media

Concentration: 82.9%

Read: Most concentrated category in the dataset. Reddit is mentioned 12x more often than the next brand and cited 5x more often than the next source. News & Media is effectively Reddit plus a long tail.

Top mentions:

Reddit	25.8M
Yahoo	2.1M
New York Times	1.5M

Top sources:

Reddit	77.5M
Yahoo	13.8M
Forbes	4.7M

Pets & Animals

Concentration: 53.4%

Read: Fairly balanced between online retailers, breed research, and veterinary information.

Top mentions:

Chewy	422K
AKC	359K
PetMD	356K

Top mentions:

PetMD	1.2M
A-Z-Animals	709K
Chewy	699K

Real Estate

Concentration: 64.7%

Read: Property-listing platforms dominate. Zillow is in dual-list balance, mentioned and cited at similar scale.

Top mentions:

Zillow	2.0M
Realtor.com	1.1M
Redfin	756K

Top mentions:

Zillow	3.5M
Realtor.com	2.3M
Apartments.com	2.1M

Sports

Concentration: 51.4%

Read: League brands lead mentions; sports media lead citations. The league brands themselves are in the Universal 36.

Top mentions:

NFL	2.0M
MLB	1.9M
NBA	1.7M

Top mentions:

ESPN	3.5M
SI.com	1.7M
CBS Sports	1.2M

Travel & Hospitality

Concentration: 46.0%

Read: TripAdvisor sits in genuine dual-list dominance. Travel is well-distributed on the curve, with room for new entrants and category-specialist providers.

Top mentions:

TripAdvisor	3.6M
Expedia	2.1M
Marriott	1.9M

Top mentions:

TripAdvisor	12.3M
Expedia	4.3M
Wheree	4.1M

Next steps

1

Find your category

Depending on your business model, if you don't appear in the top-3 mention list nor the top-3 citation list, the leaderboard tells you who the targets are.

2

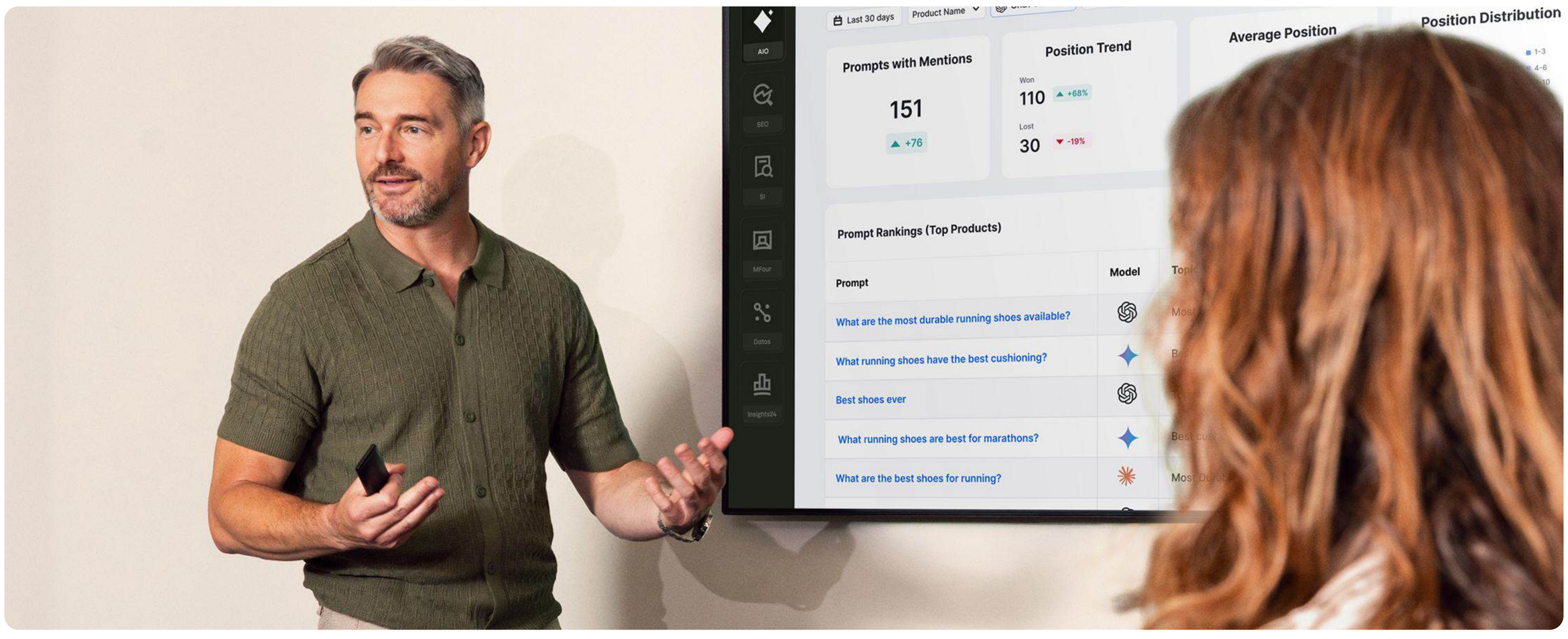
Identify your category's Citation Core

In every category, a small set of sources will likely dominate the citations. These are the third-party platforms AI uses as infrastructure for your category.

3

Calibrate ambition to concentration

In categories with concentration over 70%, overtaking any of the top 3 is unrealistic, so consider positions 4 to 10 as the target. At 50% or below, focused investment can move brands up considerably quarter by quarter.



Chapter 8

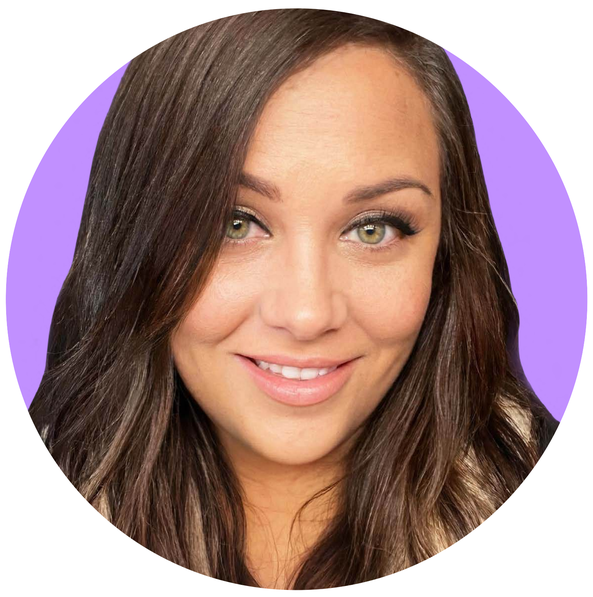
Perspectives from marketers and AI search practitioners.



Our data is one input.

The lived experience of brands navigating AI search is a second, and leading industry voices shaping it are a third. This chapter brings together those perspectives.

Contributors



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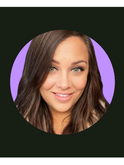
Growth Advisor



Kevin Indig

Growth Advisor

Answer Matrix

Question	 Sara Wong	 Brad Page	 Crystal Carter
What's the biggest shift in AI search that nobody's talking about?	People are actively relying on AI to make decisions in ways that are still rapidly evolving and often unpredictable.	How early we are in AI search's evolution. The brands dedicating resources to decoding it will continue to benefit hugely.	Agentic. The agentic AI shift is more of a seismic shift because it comes down to infrastructure and affinity.
Who's a brand that you see getting AI visibility right?	Hyundai has the right mindset for AI search, thinking beyond content to how AI can enhance real human experiences, from their product innovations to their website experience.	Retail giants with detailed product pages and reviews like Bol or Coolblue in the Netherlands. Consumer brands like Samsung and Yeti have also become hyper-authoritative.	Agentic leaders like Stripe and PayPal are providing value for classic search and LLM responses as well as driving forward AI innovation.
Where do marketing leaders often get AI visibility wrong?	Treating AI visibility like a campaign instead of a system. Success requires consistently curating meaningful, quality content and continued measurement to inform necessary optimizations.	Leaders must treat AI visibility as a core philosophy rather than a content function. It can't be treated as a niche or boxed in with SEO. Without a clear narrative across touchpoints LLMs won't notice you.	Many expect AI to replace peak Google SEO traffic. Yet customer expectations are changing as they discover info in a completely new way. The content mindset needs to shift, ensuring websites are useful resources, not destinations.
If you could reallocate 20% of your marketing budget toward AI visibility tomorrow, where would it go?	Prioritize multimodal content that offers human experience as it performs well with audiences and is increasingly favored in AI search. Budget for creative agencies to explore new formats and technology. Invest in measurement that identifies content gaps and tracks AI visibility at a granular level.	Invest in a framework of AI visibility auditing and tracking. Set your benchmark, then optimize across: Owned, meeting the tech requirements of models. Earned & Social, leveraging creators and communities. Paid, reinforcing absolute message consistency.	YouTube. YouTube is incredibly efficient with regards to AI and SEO, consistently ranking highly and acting as one of the most cited sources across models.
What's the most important search investment for 2026?	Organizational alignment and the ability to measure impact on AI visibility. Winning brands will connect cross-channel executions with a clear understanding of how each touchpoint contributes to AI visibility.	Break down siloes to ensure investment is a balanced portfolio play. Invest in customer journey mapping. Ensure your content is built for both humans and agents. Defend core spaces in traditional paid and organic search while testing emerging spaces like paid AI search placements, Meta, and TikTok.	Brands that invest deeply in building for their customers and understanding their customer data will do well. Optimize for customer needs and ensure agents can recommend you through your FAQs, support documentation, collaborations, and resources that you offer.

Question	 Eli Schwartz	 Kevin Indig	 Graham Hardt
What's the biggest shift in AI search that nobody's talking about?	Personalization. Much of AI is going to be about creating personal experiences and answers, yet everyone is acting like AI is just SEO 2.0.	The harness. This creates the agentic loop with the model. It can also enable personalization, which is currently difficult to measure.	Quality divergence. We see traditional search users have greater intent than ever, but AI varies wildly. Now brands must continuously prove they're the answer.
Who's a brand that you see getting AI visibility right?	Embarrassingly for our industry, I have yet to come across one. Almost everyone I meet is just repackaging SEO to AEO.	Ramp and Glean appear consistently because they have teams that understand the right mix of non-commodity content, unique data, positioning and offsite presence.	Salesforce. We've rebuilt our content with true E-E-A-T signals and AI-referred sessions convert like or better than organic search. Reddit is also the champion of UGC and experiences, LLMs have noticed.
Where do marketing leaders often get AI visibility wrong?	Metrics need to shift away from visibility. I think AI search has to be focused on the follow up — whether this is clicks, direct traffic, or conversion.	CMOs want to know about business impact, but measurement is often inaccurate. Instead, tight leading plus lagging indicators should be monitored with self-reported attribution.	Treating AI visibility and SEO as separate tracks leads to duplication and mediocre results. Secondly, a sole focus on improving metrics rather than brand authority, content architecture, and trust across the web.
If you could reallocate 20% of your marketing budget toward AI visibility tomorrow, where would it go?	Brand marketing efforts. That might include out of home campaigns like billboards, TV ads, Youtube, and PR. The brands that people know and recognize will be what shows up in AI results.	The approach has to be individualistic, but across: Strong SEO, YouTube, proprietary research, brand advertising, workflow automation, social presence, and storytelling content.	Owned content that's well-structured, hygienic and supported by technical SEO. Off-site authority to reinforce visibility. Granular measurement capabilities.
What's the most important search investment for 2026?	Be exactly what the customer wants. If there's a mismatch between expectations and performance that will impact AI visibility so it's vital that you pay attention to feedback and adapt.	Content that creates trust and ensure authentic face (or faces) for a brand. Successful brands make it easy for buyers to connect, understand where they excel and who they're for. They also offer outstanding customer experience and service.	Reskilling marketing teams for agentic search. Everyone must become fluent in how AI systems retrieve, summarize, cite, and recommend, raising the bar on content quality to match.

Chapter 9

Methodology

We close with a look forward. Where is AI search heading and what capabilities will brands require in response? Here's how organizations will need to change their approach, and how marketing leaders can drive this forward.

Brand visibility becomes an organizational function

Adding more content to your own site rarely creates an advantage by itself, because anyone can do it. What AI visibility actually rewards sits off-domain, in the high-relevance third-party sources AI treats as the main driver of visibility: the review sites, communities, video platforms and publications it quotes from. Earning a place there is closer to digital PR than to publishing, and it is hard to do. Building and sustaining a Reddit community, or videos that get real engagement on YouTube, takes years. The moat is not the content on your own site, it is how much you can influence the sources that matter to mention you and link to you. That work crosses brand, PR, content and customer experience, which is why brand visibility is becoming an organizational function rather than a content task.

Content depth as a brand asset

Content production shifting from a volume game to a depth and proprietary-asset game. The brands cited most by AI search are the brands with proprietary, hard-to-replicate content assets. Original research, first-party data, user-generated content libraries, expert-authored knowledge bases.
The implication for content strategy is that production needs to shift from quantity to depth. From articles to assets. The focus needs to shift towards category-defining knowledge that lends itself to building authority.

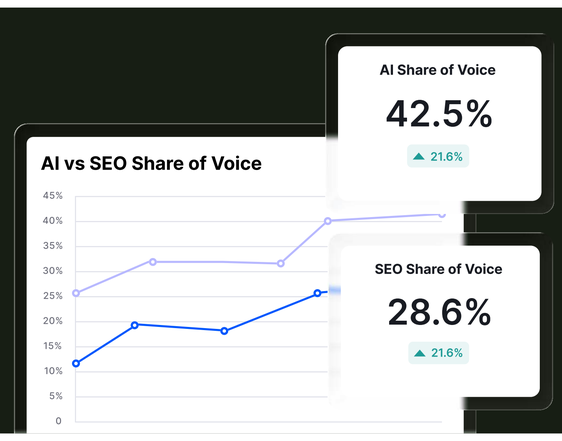
The brand-citation flywheel

Strong brands accumulate citations more easily because third-party sources have more to say about strong brands. Citations reinforce brand strength because AI surfaces strong-citation brands more often in answers. The flywheel takes years to spin up and is hard to spin down once running. The brands that invest in consistent messaging across branded channels throughout 2026 and 2027 will compound advantages through 2028 and beyond.

Measurement maturity as a competitive advantage

Our recent Semrush survey of 481 marketers found that 45% cannot properly measure visibility in AI answers, and only 9% can measure all the metrics that matter. This gap impacts revenue. 81% of teams with fully integrated SEO and AI search execution report more traffic or leads. Brands that build the analytics infrastructure to track SEO and AI search holistically now, will see and act on signals competitors cannot, opening up a moat that could prove impossible to close.

Generative AI features are rooted in the same ranking and quality systems that power organic search — which means SEO best practices still compound. **Semrush's Enterprise SEO** allows global brands to put organic rankings and AI visibility into one playbook, so teams can track both side by side and see exactly where traditional optimization efforts drive AI performance.



The shift CMOs are facing

Four actions follow from the themes above:

1 **Build clear, connected measurement for AI search and SEO.** Shared data with per-platform tracking, mention versus citation separation, and category-specific benchmarking are the operational baseline.

2 **Invest in proprietary content assets rather than content volume.** The brands AI cites most are the brands that own something AI couldn't reconstruct from other sources. Original research, proprietary data, first-party customer content. Quality and uniqueness over quantity and frequency.

3 **Show up on the platforms AI leans on, not just your own site.** Much of what AI surfaces is created on YouTube, Reddit, Quora and similar platforms, not on a brand's own pages. A brand that's focused only on its own site and neglects its industry's Citation Core, under-uses the sources AI trusts most. Earning genuine presence and advocacy on those platforms now sits alongside owned content, not after it.

4 **Bring brand, content and customer experience teams into the same conversation.** The work of building citation infrastructure crosses traditional organizational lines. The brands that coordinate across these functions are the brands the data shows winning.

Methodology, taxonomy, glossary and sources.

Methodology

Dataset scope

The analysis in this report draws on Semrush's US AI Visibility prompt database for the January to April 2026 four-month window. The database is cumulative, growing from 89M deduplicated prompts in September 2025 to 126M by April 2026.

Prompts in the database come from two sources: keywords for which Google Search returns an AI Overview result, and prompts used to collect responses from the three other LLMs covered by this report. New prompts are added as new keywords trigger AI answers; existing prompts are retained across snapshots.

Platforms tracked

ChatGPT with web search enabled (chatgpt.com), Gemini (gemini.google.com), Google AI Overview (google.com), and Google AI Mode (google.com with AI mode enabled). Responses are collected through each platform's public interface without selecting specific model versions, to mirror the behavior of an everyday user.

Verticals covered

22 reporting verticals, with 89 subcategories. Vertical classification is applied to brands and sources after the prompt data has been collected, and is aligned to industry-standard taxonomies (IAB Tech Lab, Google product categories).

Metrics defined

Mention: The number of prompts that trigger AI responses mentioning your brand.

Citation: The number of AI responses that cite your domain as a source.

AI Visibility Index score: 0-100 score representing how prominently a brand appears in AI search answers across all four platforms, weighted by query volume and ranking position. 100 represents theoretical maximum visibility for a brand in its category; Universal 36 brands typically score 80-95, category leaders 60-80.

Mention-source overlap: Percentage of brands in the top 100 most-mentioned list that also appear in the top 100 most-cited list for the same platform and vertical.

Concentration: Share of category top-10 mention volume held by the top three brands.

Source surplus: Ratio of citations to mentions for a specific source.

Aggregation approach for the four-month window

Universal 36: strict intersection across all four months and all four platforms.

Mention-source overlap and platform-pair overlap: simple average across the four months.

Concentration curve: average across months of per-month per-LLM averages.

Source surplus ratios: aggregated total citations / aggregated total mentions across four months.

Brand mention volumes: aggregated totals across four months.

Known limitations

Data depth: Brand Leaderboard captures top 30 brands per (platform, vertical, month). Brand Co-visibility extends to top 100. Brands below these thresholds may not appear in strict intersection cuts.

Platform changes: All four platforms update models and source-weighting periodically, which can shift brand and source rankings between months.

Geographic scope: Cross-platform tile metrics use platform-native worldwide aggregates. Country-level case study data aggregated from per-country exports across 15 countries.

Brand entity resolution: Brand mentions are extracted per response with no normalization across brand variants. Distinct domains and brand names belonging to the same parent (for example, Chase and JPMorgan Chase, or Google and YouTube) appear separately in the data.



Vertical taxonomy

The 22 reporting verticals used in this report:

- Arts & Entertainment
- Automotive & Vehicles
- Beauty & Cosmetics
- Business & Professional Services
- Consumer Electronics
- Digital Technology & Software
- Ecommerce & Retail
- Education & Training
- Fashion & Apparel
- Finance
- Food & Drinks
- Gaming
- Government & Public Sector
- Health & Fitness
- Hobbies & Leisure
- Home & Garden
- Industrial
- News & Media
- Pets & Animals
- Real Estate
- Sports
- Travel & Hospitality

Glossary

AI search

Search experience where the response is composed by an AI model rather than a list of ranked links.

AI visibility

How often and how prominently AI search platforms mention a brand and cite its content. Distinct from traditional SEO visibility.

Brand mention

Instance of a brand name appearing in an AI answer.

Citation

Instance of AI quoting from a specific URL or domain.

Citation infrastructure

Network of third-party websites AI quotes from when answering questions about a category or brand.

Concentration curve

Shape of category top-3 mention share across the 22 verticals. Runs from News & Media (82.9%) to Finance (41.4%).

Cross-platform spread

Range between a brand's highest and lowest AI Visibility scores across the four platforms.

Dual-list balance

Pattern where a brand appears at similar volume in both the most-mentioned and most-cited source lists on a specific platform. Rare.

LLM

Stands for large language model. This is the system that generates AI search responses. Used interchangeably with "AI platform".

Mention-source overlap

Percentage of brands appearing in both the top 100 most-mentioned and top 100 most-cited lists for a platform/vertical.

Source Surplus

Pattern where a source is cited far more often than it's mentioned.

Source Deficit

Opposite to Source Surplus, where a brand is mentioned far more often than cited from its own pages. Most consumer brands sit here.

Universal 36

The 36 brands appearing in the top 100 most-mentioned on every AI platform in every month from January through April 2026.

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