

Avenue **Z**

# AI Shopping Visibility Index

ECOMMERCE:  
BEAUTY

2025

**AIVx**

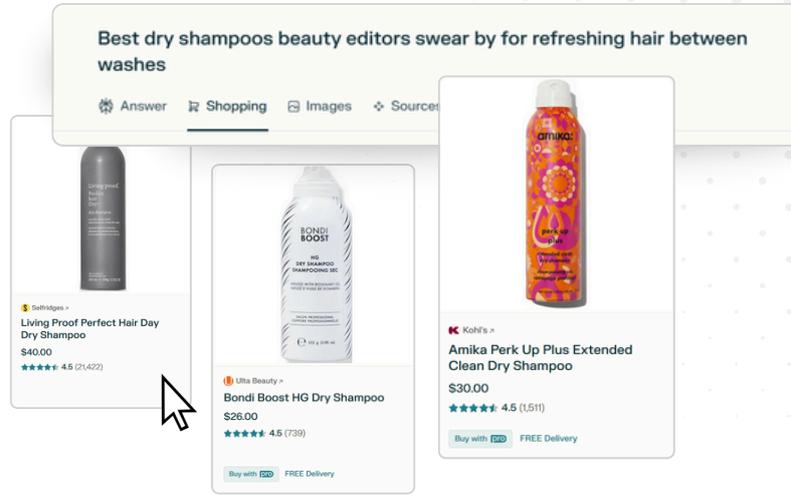
AI VISIBILITY INDEX (2025)



# AI Visibility Index: The Future of Product Visibility

AI is rewriting the rules of eCommerce visibility. It shapes what consumers discover, trust, and ultimately purchase. From awareness to conversion, AI systems now influence every step of the customer journey, driving traffic, shaping reputation, and impacting revenue.

The **AI Visibility Index** uncovers the key factors behind brand discoverability in AI-driven shopping and search, revealing what determines which brands get recommended and which get overlooked.






## AI SHOPPING

### What We Found

# 4x

Perplexity Triggers Shopping 4x More Than ChatGPT

# 25%

Only 25% of AI Cited Sources Are Brand-Owned

# #1

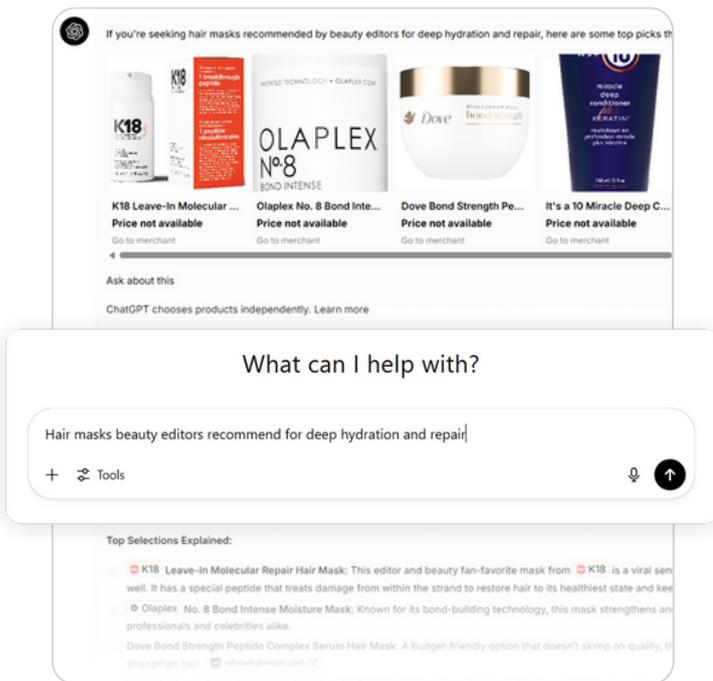
Viral Niche Beauty Outranked Legacy Giants in Shopping

## Key Takeaways

**AI Rewards Cross-Channel Visibility**  
Brands seen across DTC, retail, social, and SEO are more likely to appear in AI recommendations. Visibility across platforms creates algorithmic familiarity.

**Third-Party Mentions Matter a Lot**  
High-volume brand mentions in reviews, articles, and forums boost perceived authority. The more you're talked about, the more likely AI is to recommend you.

**AI Prefers Ubiquity Over Platform**  
Products consistently featured in "best of" lists are favored by AI assistants. Performance accolades translate directly into recommendation power.



# Research Overview

This research analyzes how 60 leading beauty brands performed in AI search and shopping. Using publicly available data, select analysis tools and our own proprietary Z-Score metric, the study measured brand performance across five key signals that influence discoverability in AI search to benchmark visibility, identify gaps, and help brands understand how to adapt.

## Pacesetters in Beauty

AI visibility in the beauty sector is more widely distributed than in other industries, reflecting a crowded, competitive landscape with many brands vying for consumer attention. The top three brands captured 13% of total AI visibility—strong performers, but not overwhelmingly dominant. The top ten brands collectively accounted for 37%, indicating a broader spread of influence across high-performing names. Meanwhile, half of the 60 brands analyzed registered less than 5% each, underscoring the challenge for emerging players to break through in a market where attention is more evenly shared.

## AI Visibility Analysis

This comprehensive analysis examines how 60 leading beauty brands are performing in AI visibility metrics across 100+ industry-specific LLM prompts. This dataset, despite unpredictable changes to LLMs, provides a snapshot in time of AI search visibility and the factors that influence it.

### 60 Leading Beauty Brands

Ranging from legacy leaders to emerging disruptors across multiple markets and models

### 100+ AI Prompts Analyzed

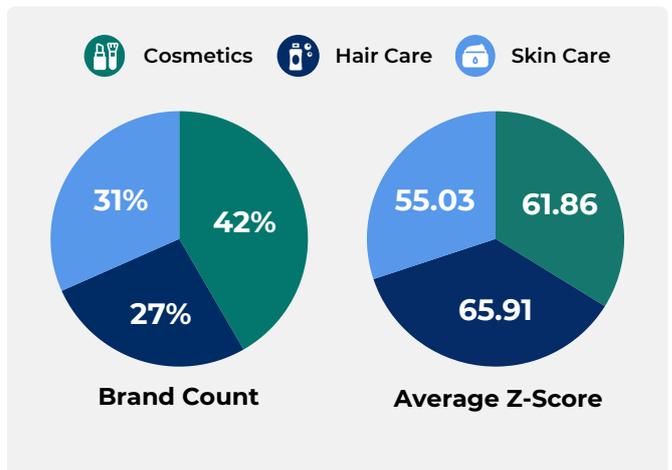
Real consumer search behavior: how users ask questions and seek solutions in AI search

### 03 LLMs Monitored in 2025

Capturing daily fluctuations in AI visibility, a robust view of patterns, trends, and volatility across a dynamic search landscape (collection ended in July 2025).

## Brand Segmentation

Segments	Company Criteria
 <b>Cosmetics</b>	Products primarily designed to enhance or alter the appearance of the face or body. This includes color cosmetics (makeup), eye products, lip products.
 <b>Hair Care</b>	Products used to cleanse, nourish, style, and maintain the health of the hair and scalp. This category includes shampoos, conditioners, and treatments.
 <b>Skin Care</b>	Products designed to improve, protect, and maintain the health and appearance of the skin. Includes treatments, moisturizers, cleansers, sunscreens, and anti-aging products.



## AI Platforms Used

These three AI platforms were mentioned in over half of relevant AI-generated answers, indicating broad recognition across multiple query topics:



# In This Report

## 05 **AI Visibility Index: Top 30**

Detailed rankings of the top-performing brands based on AI visibility, citations, and media presence.

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## 07 **AI Visibility Index: Final 30**

Insights into the brands with lower AI visibility and the potential opportunities they hold.

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## 09 **AI Share of Voice: Top 10**

Breakdown of how often each brand appears across top AI platforms like ChatGPT, Perplexity, and Gemini.

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## 11 **AI Prompts: Top Topics, Tracked & Variance**

Analysis of the types of questions and topics that surface specific brands in AI model responses.

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## 14 **Influential Media Sources & Articles vs. Citations**

A review of the media outlets and content sources most frequently cited by LLMs.

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## 16 **Technical Optimization Factors**

Examination of how website performance, SEO, mobile, security, UX and structure impact AI visibility.

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## 17 **Content Footprint & Source Diversity**

Evaluation of how the variety and volume of brand content influence LLM citation rates.

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## 18 **General Trends & Insights**

Key takeaways and strategic suggestions to improve AI discoverability and share of voice.

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## 19 **How to Improve AI Search Visibility**

Proven tactics to increase authority, credibility, and influence in AI-driven search.

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Data sources, references, methodology, and acknowledgements for information used throughout the report.

# AI Visibility Index

eCommerce: Beauty



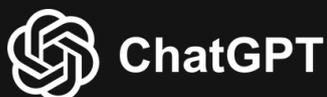
AI VISIBILITY INDEX (2025)

## Summary

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This index reflects the AI visibility performance of top eCommerce beauty brands, measured through our proprietary Z-Score framework. By tracking brand mentions across ChatGPT, Perplexity, and Gemini approximately 8 times daily, we evaluated which companies consistently surfaced in LLM responses.

The Z-Score normalizes each brand's visibility relative to peers, highlighting those outperforming the average across **core topics like products, ingredients, and desired usage outcomes**. The results offer a data-backed snapshot of how beauty brands are currently ranking in the future of AI-driven search and discovery.

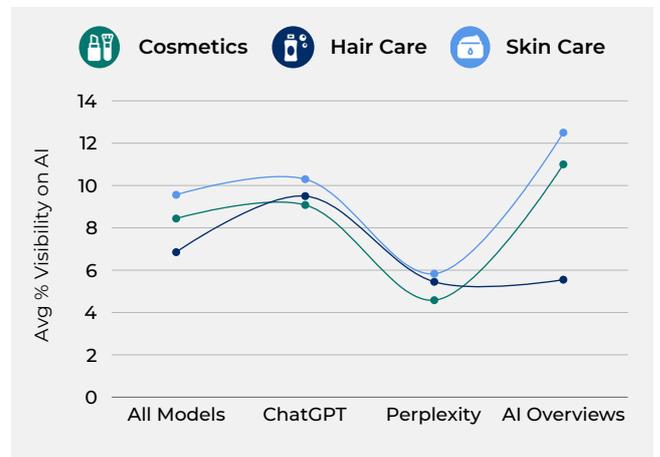
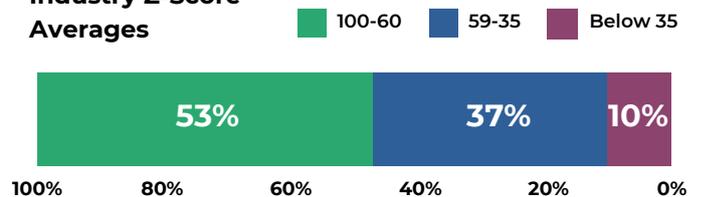


#	Brand	Z-Score
1	CeraVe	96.5
2	La Roche-Posay	95.6
3	Charlotte Tilbury	94.2
4	Maybelline	86.2
5	Living Proof	84.9
6	NARS	84.5
7	Olaplex	83.9
8	amika	83.9
9	The Ordinary	83.6
10	Kérastase	83.5
11	Rare Beauty	82.3
12	Urban Decay	80.2
13	L'Oréal	79.1
14	Fenty Beauty	78.8
15	Briogeo	78.4
16	Redken	77.4
17	SkinCeuticals	74.5
18	e.l.f. Cosmetics	72.2
19	Moroccan Oil	71.1
20	Tarte	69.5
21	OUAI	69.4
22	Pureology	69.3
23	Oribe	68.7
24	NYX	66.7
25	Neutrogena	65.7
26	MAC	64.6
27	Estée Lauder	63.5
28	Tatcha	63.2
29	Too Faced	63.1
30	K18	62.6

## Top 30 eCommerce Beauty Brands Ranked by the Z-Score

**What is the Z-Score?** The Z-Score is a proprietary rating method used to evaluate and score each company's AI visibility, AI brand sentiment, top-tier media coverage, technical performance, organic search visibility and business growth factors relative to the industry.

### Industry Z-Score Averages



**Top 30 Ranked Brands** represent over 75% of total AI visibility, representing the core group driving discoverability in this space. While their individual visibility levels are lower than in other industries we've analyzed, these brands still average around 10% visibility each—indicating a more competitive and fragmented market.

**9.5%** ChatGPT Avg AI Visibility on Top 30.

**5.3%** Perplexity Avg AI Visibility on Top 30.

**9.4%** AI Overviews Avg AI Visibility on Top 30.

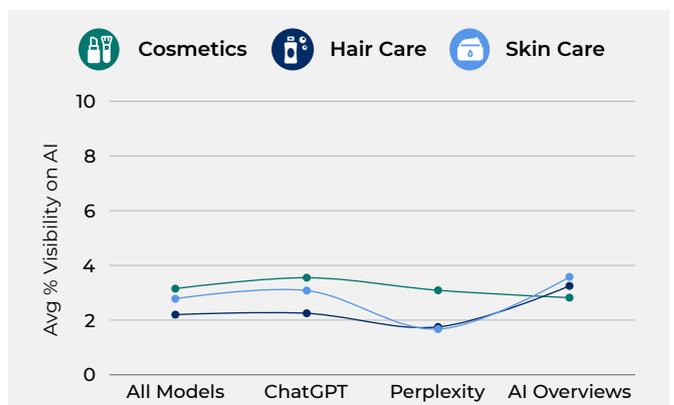
The companies listed in this report represent a sample of consumer-facing options within this industry group. While classification may vary, all included entities reflect relevant and accessible choices for consumers navigating this space.

#	Brand	Z-Score
31	 Hourglass	62.5
32	 Prose	62.3
33	 Function of Beauty	59.4
34	 Huda Beauty	58.6
35	 Laura Mercier	57.5
36	 ColourPop	56.3
37	 Glow Recipe	56.0
38	 First Aid Beauty	55.9
39	 OLAY	53.6
40	 Glossier	53.4
41	 HAUS Labs	51.3
42	 Supergoop	50.6
43	 Clarins	50.1
44	 LANEIGE	50.0
45	 IT Cosmetics	49.8
46	 Rhode	48.5
47	 OSEA	47.2
48	 Drunk Elephant	47.2
49	 Benefit Cosmetics	43.6
50	 Color WOW	41.7
51	 LUSH	41.3
52	 Summer Fridays	40.8
53	 Jones Road	36.7
54	 Verb	36.7
55	 Primarily Pure	29.2
56	 Revlon	24.0
57	 Aesop	23.0
58	 Native	21.4
59	 Thrive Causemetics	19.7
60	 Sol de Janeiro	15.8

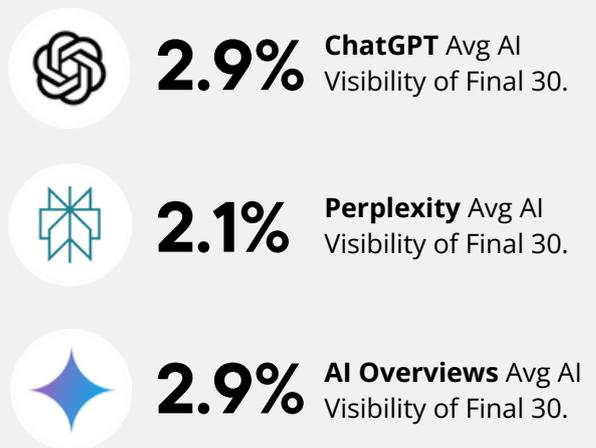
## Final 30 eCommerce Beauty Brands Ranked by Z-Score

While the bottom 30 brands may have lower Z-Scores, many still demonstrate strong online authority through media coverage, content optimization, and organic presence. However, aligning these efforts to ensure inclusion in LLM-generated answers remains a critical next step.

## 25% Total AI Visibility Market Share For Rank 30-60 Brands



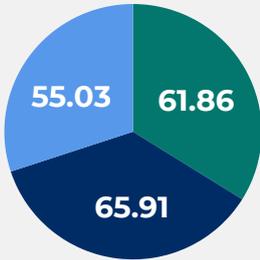
**Final 30 Ranked Brands** are the bottom-ranked beauty brands in AI visibility across ChatGPT, Perplexity, and Gemini. These brands commonly lack broad third-party coverage, high-sentiment product mentions, and inclusion in “top product” or trend-driven roundups. Many are clean, indie, or luxury DTC players with loyal audiences but minimal external amplification across press, retailers, or influencers.



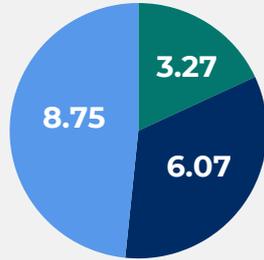
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# Analysis Factors Impacting Z-Score and AI Visibility

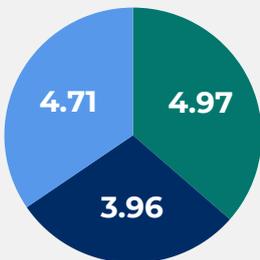
 Cosmetics
  Hair Care
  Skin Care



Z-Score Avg Segment Ratings



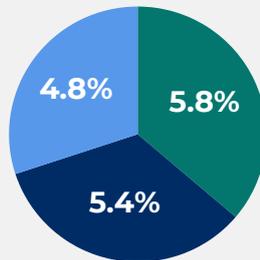
Brand Cited Sources Used by LLMs



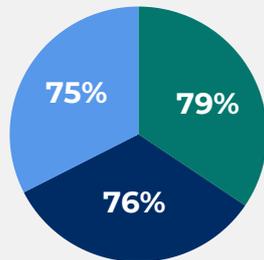
Average Position in AI Response



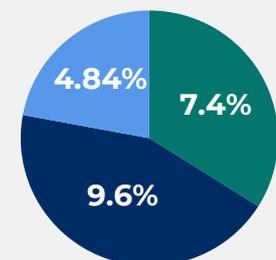
Avg Pages Cited Brand Website



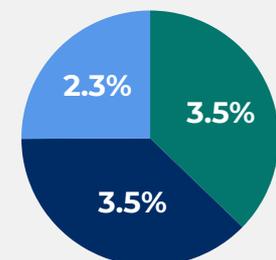
Average Visibility Across LLMs



AI Brand Sentiment Average Scores



Avg ChatGPT Shopping Visibility



Avg Perplexity Shopping Visibility

**Time Period:** These statistics are based on data collected before the end of July 2025 and is segmented by primary product types.

## Unique Data Correlations

Finding	Summary
eCommerce Platform	Non-Shopify brands lead in AI visibility due to broader reach and reputation—not because of platform tech alone.
Brand Sentiment	Brands with stronger sentiment scores are more likely to be recommended—AI favors what consumers and experts love.
Owned Content	Most brand sites weren't cited by AI. Only highly trusted, SEO-optimized content made it into the recommendation set.
Third-Party Validation	AI relies on external sources. Media, retailers, and influencer mentions weigh more than a brand's own website content.

**Our analysis of 60 leading beauty brands** reveals that AI visibility, measured through Z-Score normalization and LLM citation frequency, is driven by a blend of positive sentiment, third-party endorsements, SEO-friendly content, and omnichannel visibility. Hair care brands lead in overall Z-scores and ChatGPT shopping visibility, while skincare brands are cited most often by LLMs. Cosmetics brands have more pages cited per site. Despite these strengths, most core metrics like sentiment, position, and LLM visibility are evenly distributed.

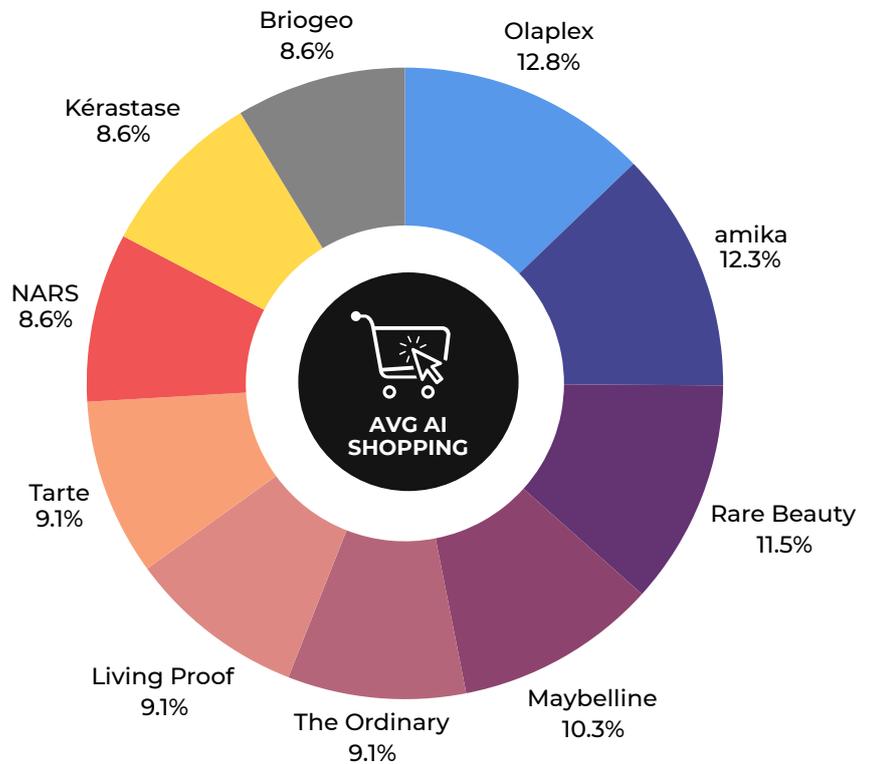
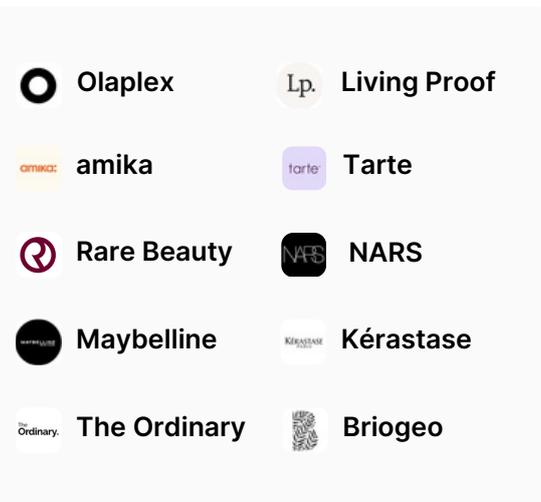
“With this research, it’s clear that AI Visibility is influenced by a combination of high-impact media placements, technical data structuring optimized for AI crawlability, and quality content that mimics natural language.

Johnny Hughes, CMO, Avenue Z

# AI Shopping: Top 10 Brands

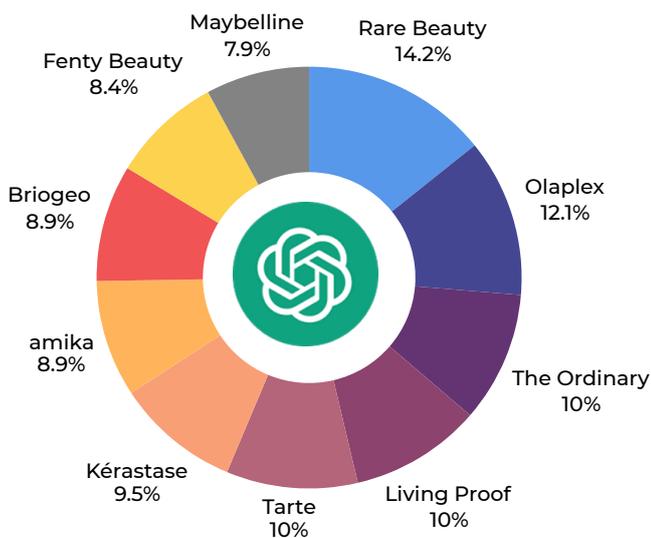
## Top 10 Beauty Brands by AI Shopping Visibility

These brands have the highest cumulative average AI Shopping Visibility across ChatGPT and Perplexity according to AI Grade.

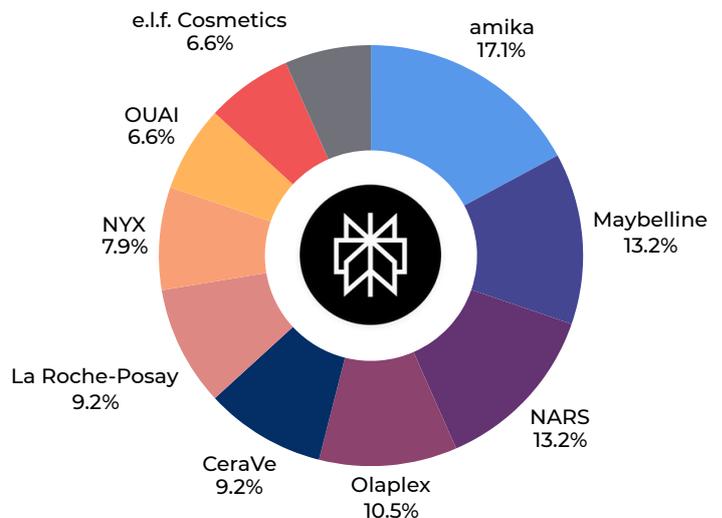


## Top Brands by AI Shopping Platform

Perplexity shows shopping results for **92%** of prompts vs. just **24%** for ChatGPT.



**ChatGPT:** ChatGPT's shopping mode activates selectively, favoring highly rated, buzzworthy products in high-intent queries.



**Perplexity:** Perplexity triggers shopping results by default, offering more frequent brand visibility across a wider range of prompts.

# AI Shopping Terms

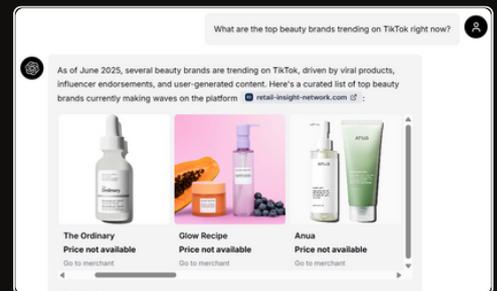
## 01 AI Shopping Visibility %

The percentage indicating how frequently AI-generated responses include an embedded shopping module highlighting recommended products, based on user queries.



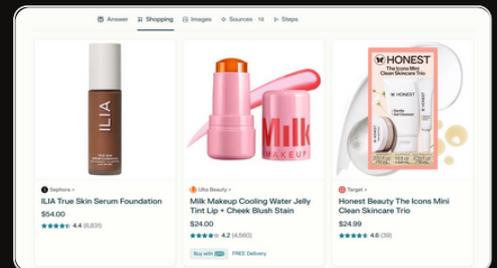
## 02 ChatGPT Shopping

ChatGPT's selective AI-driven shopping assistant mode, which activates specifically for high-intent, product-focused searches, showcasing top-rated and expert-endorsed products.



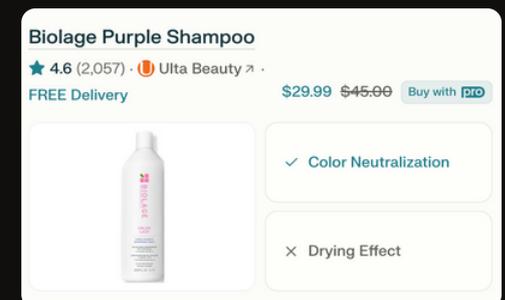
## 03 Perplexity Shopping

Perplexity's AI shopping module, automatically activated in response to most consumer queries, prominently featuring products from retail and brand partners.



## 04 Perplexity - Buy With Pro

A Perplexity shopping feature offering users direct, streamlined checkout options, prominently highlighting trusted merchant products in AI-generated shopping results.



## 05 Shopify MCP

Shopify's Merchant Connect Program (MCP) allowing Shopify-powered brands to optimize product visibility and seamlessly integrate commerce directly within AI-generated shopping responses.



# ChatGPT Shopping

Certain brands dominated the ChatGPT shopping suggestions on those occasions it was active. **Olaplex, Living Proof, amika, Fenty Beauty, and Tarte** were leaders in prompts where the Shopping assistant was activated.

## 24% Selective But Impactful

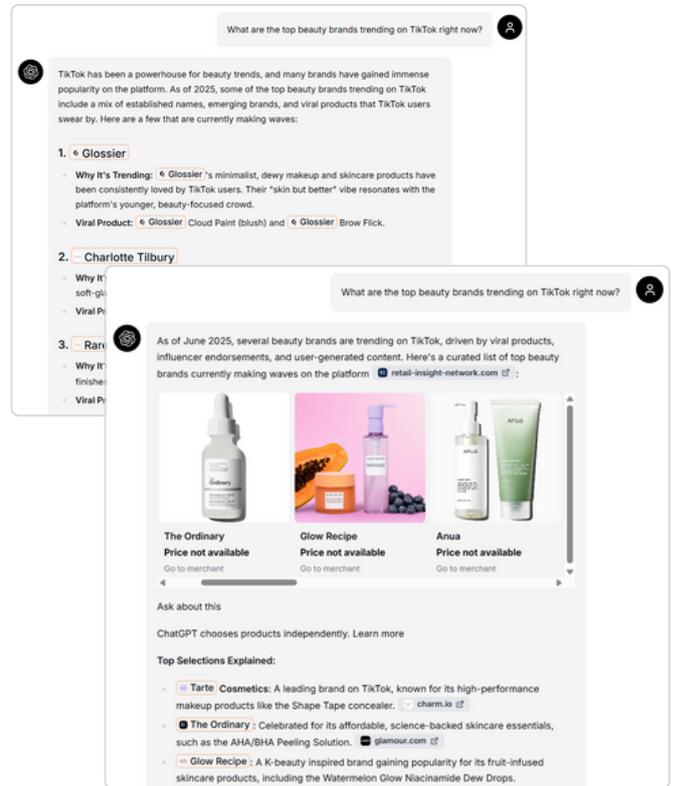
ChatGPT only triggered its shopping assistant in 24% of prompts—but when it did, brands like CeraVe and Rare Beauty dominated the shelf.

## 27% Social Buzz = Shelf Space

ChatGPT heavily favored buzzy, top-rated brands—Rare Beauty appeared 27% of the time, outpacing even higher-ranked competitors.

## 100% Performance Language Unlocks Shopping

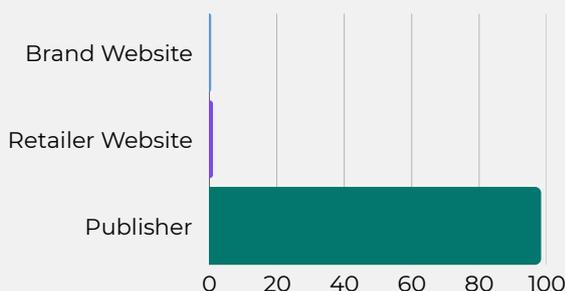
Prompts using phrases like “top-rated” or “expert-recommended” were far more likely to activate ChatGPT’s shopping mode, driving visibility for proven performers.



### Types of Sources Cited

ChatGPT Shopping overwhelmingly cites third-party publishers, which account for 98% of all sources—far eclipsing brand or retailer domains.

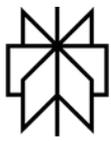
#### Top Publications:



### Semantic trends around prompts that trigger ChatGPT Shopping

Which prompts triggered ChatGPT’s shopping assistant? They were predominantly specific product-finding queries, often those emphasizing top-rated or expert-approved products.





# Perplexity Shopping

**Perplexity's Merchant Program** gives brands a direct line into AI-driven commerce—letting them influence recommendations, gain product insights, and compete for top placement in shopping results without relying solely on affiliate media.

## 92% Shopping Prompt Activation

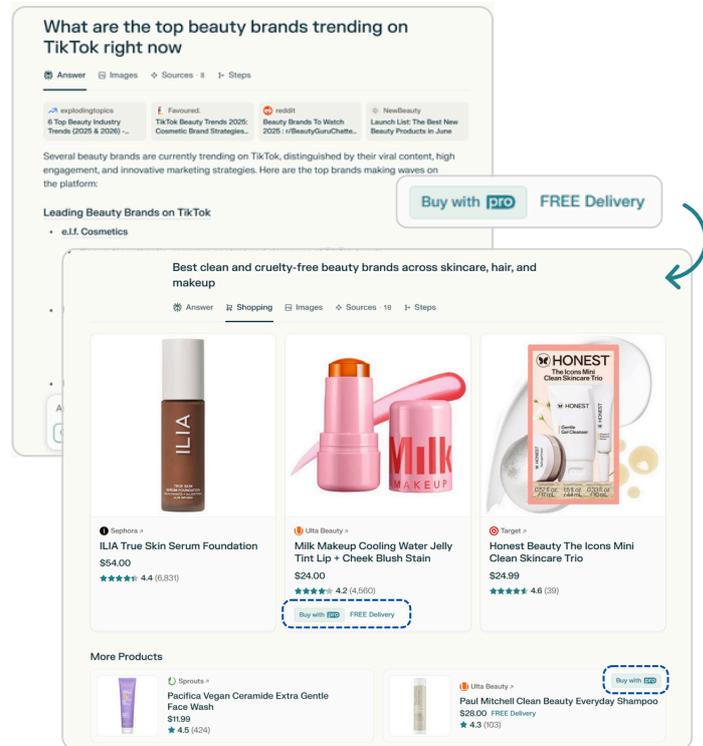
Perplexity's shopping mode triggered on 92% of prompts—turning nearly every beauty question into a shoppable moment.

## 55% "Buy With Pro" Advantage

55% of Perplexity shopping answers featured a "Buy With Pro" product in the first position—its top slot favors trusted picks.

## #1 Spot in Perplexity Shopping

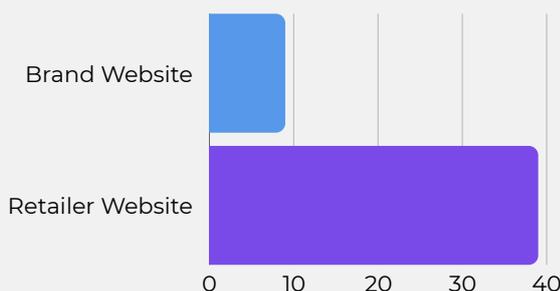
amika, Olaplex, Urban Decay, Redken, and NARS claimed the top product slot most often — each a powerhouse with wide retailer visibility and strong consumer buzz.



### Perplexity's Purchase Paths

Perplexity overwhelmingly directs users to retailers, over 4x more than to brands, favoring broad availability over brand-owned pages.

#### Top Retailers:



### Why Perplexity's Merchant Program Matters for Beauty Brands

Perplexity offers beauty brands more than just visibility. For eCommerce leaders, it's a strategic advantage in AI shopping discovery.

- **Preferred Placement:** Products in the index are more likely to be recommended based on quality and query relevance.
- **Seamless Checkout:** "Buy with Pro" one-click purchase options integrate directly with merchant platforms.
- **Free Developer Access:** Brands can use Perplexity's API to build tailored search tools that surface their own catalog.
- **Consumer Intelligence Dashboard:** Track the search and shopping trends where your products appear most frequently.

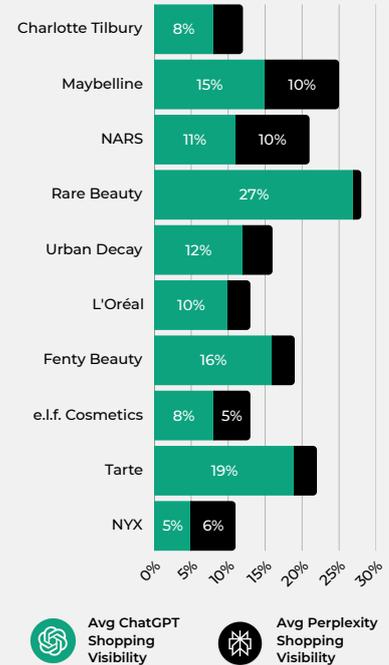
# Top 10 Brands by Category

## Cosmetics

TOP 10

**Cosmetics:** Products primarily designed to enhance or alter the appearance of the face or body. This includes color cosmetics (makeup), eye products, lip products.

#	Top 10	Platform	AI Shopping	Z-Score
1	Charlotte Tilbury	Custom Cart	6.00%	94.2
2	Maybelline	Retail Referral	12.50%	86.2
3	NARS	Salesforce	10.50%	84.5
4	Rare Beauty	Shopify	14.00%	82.3
5	Urban Decay	Salesforce	8.00%	80.2
6	L'Oréal	Retail Referral	6.50%	79.1
7	Fenty Beauty	Shopify	9.50%	78.8
8	e.l.f. Cosmetics	Salesforce	6.50%	72.2
9	Tarte	Salesforce	11.00%	69.5
10	NYX	Salesforce	5.50%	66.7
SECTOR AVERAGE			9.00%	78.9

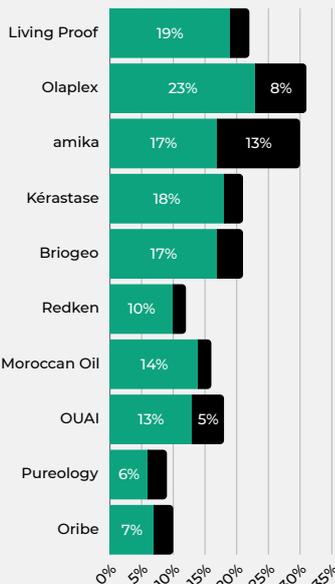


**Hair Care:** Products used to cleanse, nourish, style, and maintain the health of the hair and scalp. This category includes shampoos, conditioners, and treatments.

## Hair Care

TOP 10

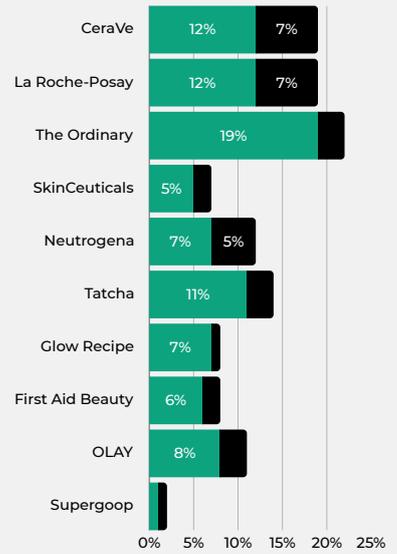
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2	Olaplex	Shopify	15.50%	83.9
3	amika	Shopify	15.00%	83.9
4	Kérastase	Salesforce	10.50%	83.5
5	Briogeo	Shopify	10.50%	78.4
6	Redken	Salesforce	6.00%	74.6
7	Moroccan Oil	Shopify	8.00%	71.1
8	Ouai	Shopify	9.00%	69.4
9	Pureology	Salesforce	4.50%	69.3
10	OrIBE	Shopify	5.00%	68.7
SECTOR AVERAGE			9.50%	76.8



The companies listed in this report represent a sample of consumer-facing options within this industry group. While classification may vary, all included entities reflect relevant and accessible choices for consumers navigating this space.

#	Top 10	Platform	AI Shopping	Z-Score
1	CeraVe	Custom Cart	9.50%	96.5
2	La Roche-Posay	Salesforce	9.50%	95.6
3	The Ordinary	Salesforce	11.00%	83.6
4	SkinCeuticals	Salesforce	3.50%	74.5
5	Neutrogena	Custom Cart	6.00%	65.7
6	Tatcha	Salesforce	7.00%	65.6
7	Glow Recipe	Shopify	4.00%	56.0
8	First Aid Beauty	Shopify	4.00%	55.9
9	OLAY	BigCommerce	5.50%	53.6
10	Supergoop	Shopify	1.00%	51.5
SECTOR AVERAGE			6.10%	69.8

**Skin Care:** Products designed to improve, protect, and maintain the health and appearance of the skin. Includes treatments, moisturizers, cleansers, sunscreens, and anti-aging products.



## eCommerce Platform Influence on AI Shopping Results



### Is AI Shopping Visibility Influenced by eComm Platforms? Yes and No.

#### Platform Matters, But Isn't Everything:

While Shopify powers over half of the brands analyzed, its average AI shopping visibility (4.3%) trailed Salesforce (6.6%) and BigCommerce (5.5%).

Non-Shopify platforms generally performed better, likely due to scale and broader brand recognition and a small sample size of alternatives like BigCommerce and Salesforce.

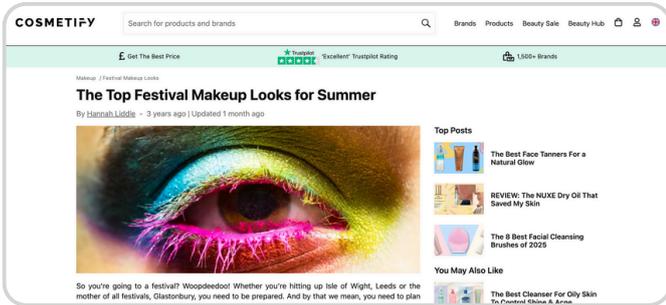
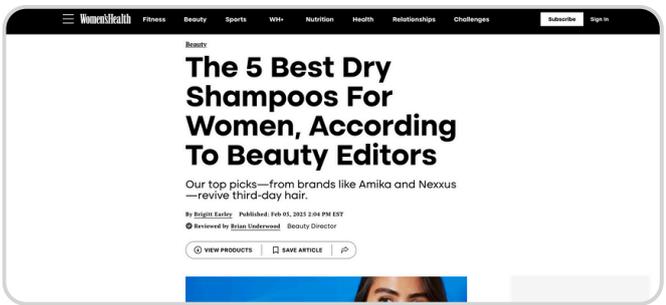
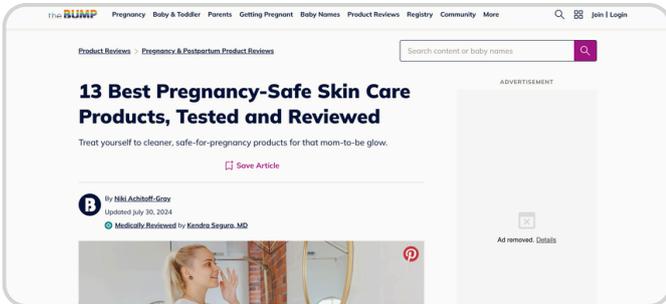
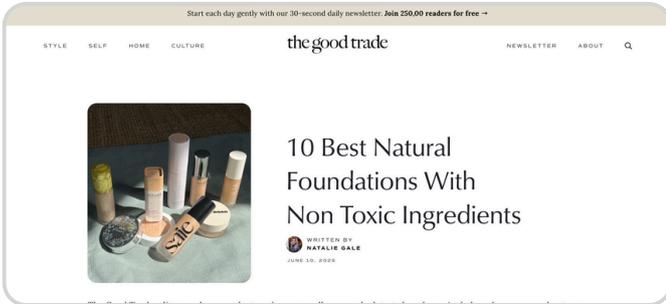
However, standout DTC brands on Shopify still ranked highly in ChatGPT shopping—proving that with the right signals, any platform can break through.



The companies listed in this report represent a sample of consumer-facing options within this industry group. While classification may vary, all included entities reflect relevant and accessible choices for consumers navigating this space.

# Influential Media Sources

When it comes to AI-driven beauty discovery, influential media outlets remain powerful gatekeepers. While visibility is more distributed than in some industries, a core group of high-authority sources, like **Byrdie**, **Sephora**, **InStyle**, **Cosmopolitan**, and **Who What Wear**, still drive a significant share of AI citations. These publishers consistently shape which brands surface in generative search, reinforcing their influence in the evolving beauty landscape.



Source	Type	Used	Avg. Citations
byrdie.com		24%	1.6
sephora.com		20%	1.0
instyle.com		17%	1.0
cosmopolitan.com		15%	1.5
whowhatwear.com		14%	1.6
allure.com		12%	0.5
youtube.com		10%	1.1
ulta.com		8%	1.8
voque.com		8%	0.6
harpersbazaar.com		7%	1.7
goodhousekeeping.com		7%	1.2
lemon8-app.com		7%	0.4
glamour.com		7%	0.6
elle.com		7%	0.7
thegoodtrade.com		6%	1.7
reddit.com		5%	0.5
people.com		5%	1.0
cosmetify.com		5%	1.7
womenshealthmag.com		3%	0.9
prevention.com		3%	0.9
ubuy.com.jm		3%	0.1
nbcnews.com		3%	0.3
cerave.com	Competitor	3%	1.5
target.com		3%	1.3
marieclaire.com		3%	0.6
businessinsider.com		3%	0.2
today.com		3%	0.2
newbeauty.com		2%	0.9
chatgpt.com		2%	1.0
kerastase-usa.com	Competitor	2%	0.7
tiktok.com		2%	0.2
nymag.com		2%	0.7
walmart.com		2%	0.3
adorebeauty.com.au		2%	1.1
nypost.com		2%	0.6
health.com		2%	1.0
oprahdaily.com		2%	0.9
independent.co.uk		2%	0.3
ubuy.co.in		2%	0.2
quora.com		2%	0.4
crueltyfreakitty.com		2%	0.4
cnn.com		2%	0.8
wwd.com		2%	0.1
bluemercury.com		2%	0.5
healthline.com		2%	1.2
wikipedia.org		2%	1.0
credobeaauty.com		2%	0.6
15minutebeauty.com		2%	1.3
theknot.com		2%	0.9
typsybeauty.com		2%	0.8
thebump.com		2%	1.8

# AI Share of Voice: Brand Sentiment Influence

**80+** Avg Sentiment for Top Brands

Top brands scored an average sentiment of 80+, proving that love from editors, experts, and consumers fuels more AI recommendations.

**77.0** Minimum Sentiment for Top 5

Each of the top 5 most visible brands had sentiment scores above 77, reinforcing the link between likability and AI ranking.

**0.44** Correlation with Visibility

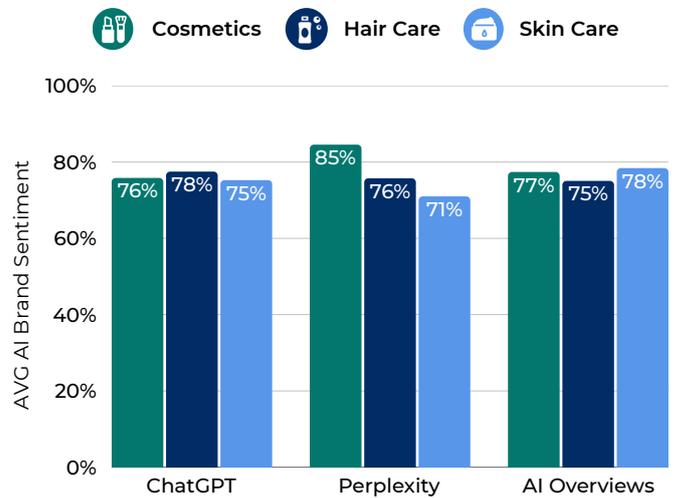
The correlation between sentiment and visibility ( $r \approx 0.44$ ) shows that reputation is a measurable advantage in AI-driven discovery.

**86.0** Rare Beauty Leads With Sentiment

Rare Beauty topped the sentiment charts at 86.0, outperforming higher-ranked competitors in sheer AI mentions thanks to glowing reviews and buzz.

**Brands with high sentiment scores are more likely to earn top placement in AI shopping results.**

The average sentiment across all brands was around 80/100, but top performers scored even higher. We found a moderate positive correlation ( $r \approx 0.44$ ) between sentiment and visibility, confirming that well-reviewed, widely praised brands are favored by AI. Strong reputation not only boosts inclusion but often shapes how a brand is described—like “top-rated” or “beloved.”



## Strategic Patterns That Influence AI Visibility

Key Traits	SOV Impact	Visibility Tier	Sentiment Signal	AI Framing	Brands
High-Volume Hair Queries	High	Positive	Positive	Function, Performance	Amika, Kérastase, Olaplex
Skin & Cream-Based Prompts	Moderate	Positive	Positive	Expert-Recommended	CeraVe, La Roche-Posay
Makeup & Concealer Prompts	Moderate	Moderate	Very Positive	Influencer-Favored	Rare Beauty, NARS, e.l.f. Cosmetics
Generic Beauty Queries	Low	Low	Neutral	Unclear / Inconsistent	DTC and Indie Brands

# AI Prompts: Top Topics

Across AI prompts, **from trend-led queries to ingredient-based discovery, visibility tends to cluster tightly**, with most brand categories ranging between 4–8%. Cosmetics brands lead in socially driven and audience-based prompts, while hair care dominates performance-driven and shopping-assisted queries. Skin care remains consistently visible across the board, highlighting its broad appeal.

AI Prompt Topics	Cosmetics	Hair Care	Skin Care
AUDIENCE-BASED	8%	6%	8%
BRAND-LEVEL DISCOVERY	5%	4%	6%
INGREDIENT-LEVEL DISCOVERY	4%	5%	7%
PERFORMANCE & RESULTS DRIVEN	5%	7%	6%
PRODUCT-LEVEL DISCOVERY	7%	7%	7%
SITUATION-BASED	6%	7%	6%
SUSTAINABILITY / GREEN / CONSCIOUS CONSUMER	3%	4%	4%
TREND & SOCIAL PROOF DRIVEN	8%	7%	5%
CHATGPT SHOPPING ASSISTANT	5%	10%	7%
PERPLEXITY SHOPPING EXPERIENCE	2%	4%	4%

## Topic Classification and Tracking Across LLMs

To benchmark AI visibility across the beauty category, we implemented a tagging system that tracked over 10 core consumer-facing topics—including Skin Care, Hair Care, Cosmetics, Product-Level Discovery, Social Proof, and more. Each topic was linked to a curated set of AI prompts designed to reflect real-world, intent-driven beauty queries. These prompts were run 8–10 times daily across three leading LLMs: ChatGPT, Perplexity, and AI Overviews. This system allowed us to measure how often specific brands were recommended by each model, compare performance by category, segment, and platform, and normalize results across model versions and answer formats. The result is a robust, comparative dataset that reveals how LLMs surface beauty brands by topic—and where discoverability opportunities remain.

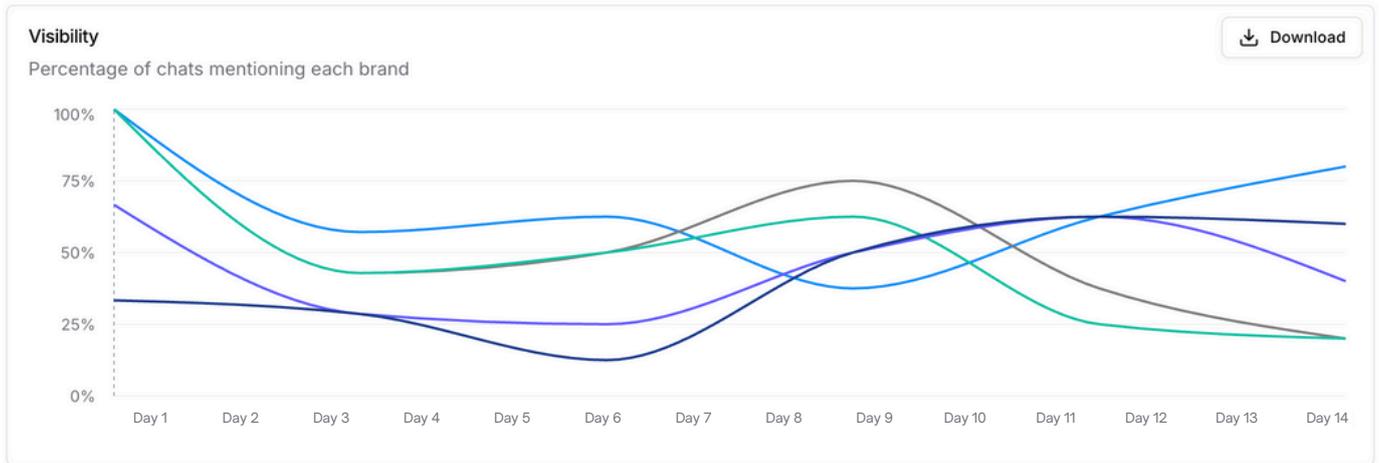
Prompt	General	Brand-Level Discovery	Ingredient
Best clean and cruelty-free beauty brands across skincare, hair, and makeup	General	Brand-Level Discovery	Ingredient
What are the top beauty brands trending on TikTok right now?	General	Brand-Level Discovery	Trend & Sc
Top-rated anti-aging night creams for achieving firm, youthful skin	Skin Care	Performance & Results Driven	Ph
Top skincare brands known for safe, pregnancy-friendly products	Skin Care	Audience-Based	Brand-Level Di
Top-rated face mists for delivering on-the-go hydration and glow	Skin Care	Performance & Results Driven	Ph
Best multi-step skincare routines and starter kits for beginners	Skin Care	Audience-Based	Product-Level
Eye creams beauty experts recommend for reducing puffiness and dark circles	Skin Care	Performance & Results Driven	Ph
Best exfoliating acids (AHAs, BHAs) that skincare enthusiasts swear by for smooth...	Skin Care	Ingredient-Level Discovery	Perf
Hair masks beauty editors recommend for deep hydration and repair	Hair Care	Performance & Results Driven	Ph
Top-rated shampoos for balancing oily scalp and nourishing dry ends	Hair Care	Performance & Results Driven	Ph
Best multi-tasking hair products to simplify your morning routine	Hair Care	Performance & Results Driven	Ph
Best-selling hair oils for boosting shine and taming frizz	Hair Care	Performance & Results Driven	Ph
Top hair care brands with refillable or zero-waste packaging options	Hair Care	Brand-Level Discovery	Sustaina
Best purple shampoos beauty influencers love for maintaining blonde and silver ha...	Hair Care	Performance & Results Driven	Ph
Top-rated scalp treatments that support healthy hair growth	Hair Care	Performance & Results Driven	Ph
Best volumizing hair products for adding body to fine, limp hair	Hair Care	Performance & Results Driven	Ph
Best heat protectant sprays for frequent heat styling and blowouts	Hair Care	Performance & Results Driven	Ph
Best dry shampoos beauty editors swear by for refreshing hair between washes	Hair Care	Performance & Results Driven	Ph
Top hair brands known for curly and textured hair care	Hair Care	Audience-Based	Brand-Level Di
Which makeup brands are known for top-performing complexion products with SPF?	Cosmetics	Brand-Level Discovery	Ingradi
Best eyeliner and mascara duos loved by beauty influencers for smudge-proof wear	Cosmetics	Performance & Results Driven	I
Top-rated highlighters beauty experts recommend for a luminous, radiant finish	Cosmetics	Performance & Results Driven	I
Top-rated concealers that beauty editors swear by for dark circles and blemishes	Cosmetics	Performance & Results Driven	I
Best setting powders and sprays recommended by makeup artists for long-lasting ...	Cosmetics	Performance & Results Driven	I

# AI Prompts: Top Tracked

<input type="checkbox"/>	Prompt	Top	Tags	Geo
<input type="checkbox"/>	Best clean and cruelty-free beauty brands across skincare, hair, and makeup		General Brand-Level Discovery Ingredient	US
<input type="checkbox"/>	What are the top beauty brands trending on TikTok right now?		General Brand-Level Discovery Trend & Sc	US
<input type="checkbox"/>	Top-rated anti-aging night creams for achieving firm, youthful skin		Skin Care Performance & Results Driven Pr	US
<input type="checkbox"/>	Top skincare brands known for safe, pregnancy-friendly products		Skin Care Audience-Based Brand-Level Di	US
<input type="checkbox"/>	Top-rated face mists for delivering on-the-go hydration and glow		Skin Care Performance & Results Driven Pr	US
<input type="checkbox"/>	Best multi-step skincare routines and starter kits for beginners		Skin Care Audience-Based Product-Level	US
<input type="checkbox"/>	Eye creams beauty experts recommend for reducing puffiness and dark circles		Skin Care Performance & Results Driven Pr	US
<input type="checkbox"/>	Best exfoliating acids (AHAs, BHAs) that skincare enthusiasts swear by for smoother, brighter skin		Skin Care Ingredient-Level Discovery Perf	US
<input type="checkbox"/>	Hair masks beauty editors recommend for deep hydration and repair		Hair Care Performance & Results Driven Pr	US
<input type="checkbox"/>	Top-rated shampoos for balancing oily scalp and nourishing dry ends		Hair Care Performance & Results Driven Pr	US
<input type="checkbox"/>	Best multi-tasking hair products to simplify your morning routine		Hair Care Performance & Results Driven Pr	US
<input type="checkbox"/>	Best-selling hair oils for boosting shine and taming frizz		Hair Care Performance & Results Driven Pr	US
<input type="checkbox"/>	Top hair care brands with refillable or zero-waste packaging options		Hair Care Brand-Level Discovery Sustaina	US
<input type="checkbox"/>	Best purple shampoos beauty influencers love for maintaining blonde and silver hair tones		Hair Care Performance & Results Driven Pr	US
<input type="checkbox"/>	Top-rated scalp treatments that support healthy hair growth		Hair Care Performance & Results Driven Pr	US
<input type="checkbox"/>	Best volumizing hair products for adding body to fine, limp hair		Hair Care Performance & Results Driven Pr	US
<input type="checkbox"/>	Best heat protectant sprays for frequent heat styling and blowouts		Hair Care Performance & Results Driven Pr	US
<input type="checkbox"/>	Best dry shampoos beauty editors swear by for refreshing hair between washes		Hair Care Performance & Results Driven Pr	US
<input type="checkbox"/>	Top hair brands known for curly and textured hair care		Hair Care Audience-Based Brand-Level Di	US
<input type="checkbox"/>	Which makeup brands are known for top-performing complexion products with SPF?		Cosmetics Brand-Level Discovery Ingredient	US
<input type="checkbox"/>	Best eyeliner and mascara duos loved by beauty influencers for smudge-proof wear		Cosmetics Performance & Results Driven Pr	US
<input type="checkbox"/>	Top-rated highlighters beauty experts recommend for a luminous, radiant finish		Cosmetics Performance & Results Driven Pr	US
<input type="checkbox"/>	Top-rated concealers that beauty editors swear by for dark circles and blemishes		Cosmetics Performance & Results Driven Pr	US
<input type="checkbox"/>	Best setting powders and sprays recommended by makeup artists for long-lasting wear		Cosmetics Performance & Results Driven Pr	US
<input type="checkbox"/>	Best-selling blushes for achieving a natural, youthful glow		Cosmetics Performance & Results Driven Pr	US
<input type="checkbox"/>	Best clean and non-toxic body care brands for everyday use		Skin Care Brand-Level Discovery Sustaina	US
<input type="checkbox"/>	Top gentle cleansers for sensitive or acne-prone skin		Skin Care Audience-Based Product-Level	US
<input type="checkbox"/>	What are the best facial sunscreens for daily use under makeup?		Skin Care Performance & Results Driven Pr	US
<input type="checkbox"/>	Which skincare brands focus on barrier repair and strengthening sensitive skin?		Skin Care Performance & Results Driven Pr	US
<input type="checkbox"/>	Which bath products offer a luxurious experience and nourish skin at the same time?		Skin Care Performance & Results Driven Pr	US
<input type="checkbox"/>	Top body sunscreens that feel lightweight and won't leave a greasy finish		Skin Care Performance & Results Driven Pr	US
<input type="checkbox"/>	Best hydrating mask brands for glowing, dewy skin		Skin Care Performance & Results Driven Pr	US
<input type="checkbox"/>	Best body scrubs and exfoliators for glowing, smooth skin		Skin Care Performance & Results Driven Pr	US

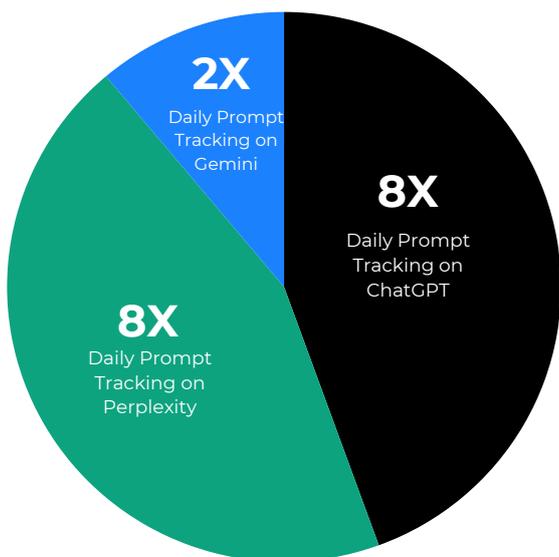
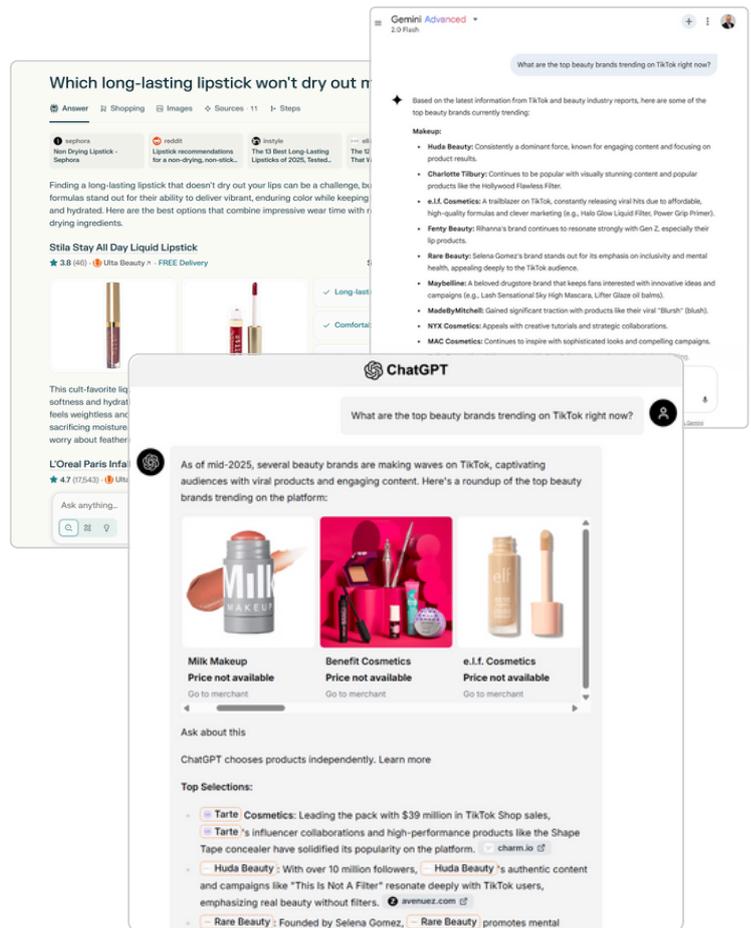
# AI Prompts: Daily Variance Tracking

Daily analysis across ChatGPT, Perplexity, and Gemini reveals how often beauty brands are recommended by generative models. Tracking these trends helps brands strategically align their market positioning and maintain high visibility.



## Tracking Brand Mentions Across Leading AI Platforms

Our analysis highlights how beauty consumers are embracing generative AI at varying levels to guide product discovery and purchase decisions. Some are just beginning to explore its potential, while others now rely on it regularly in their shopping routines.



Tracking these insights leverages a combination of manual prompting and API integration to prompt, track, and store visibility over time.

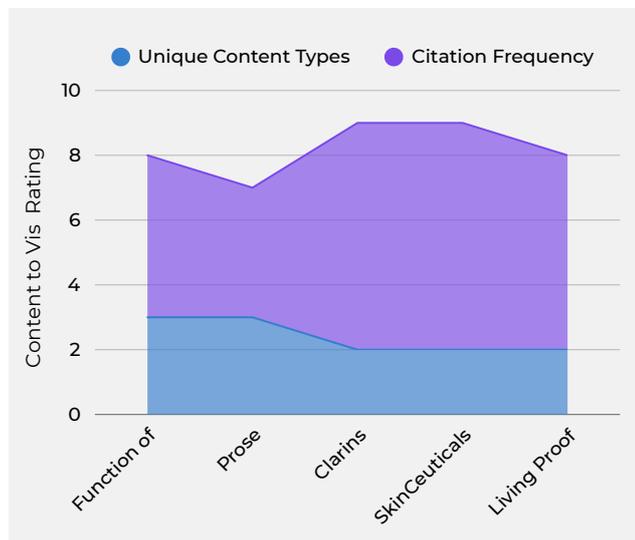
# Content Footprint & Source Diversity

One of the strongest drivers of visibility is the breadth and depth of content available about the brand for the AI to draw upon. This includes first-party content (the company's own website resources) and third-party content (news articles, reviews, comparisons, etc.). But how important is a brand's owned content footprint in the beauty industry?

**One of the clearest takeaways from our analysis is that brand websites are not the dominant voice in AI-generated beauty answers.** In fact, the vast majority of beauty brands had zero direct citations of their own pages across our dataset.

This heavy reliance on third-party sources shows that generative AI assistants lean more on aggregated opinions, reviews, and rankings than on brand-provided information. While high-quality brand content is table stakes for visibility, especially in specific educational queries, it's rarely the sole driver of inclusion in broader recommendation results. For eCommerce and marketing teams, the implication is clear: strong brand storytelling must be amplified by third-party validation.

#	Brand	Unique Content Types Used as Citations
1	 Function of Beauty	3
2	 Prose	3
3	 Clarins	2
4	 SkinCeuticals	2
5	 Living Proof	2
6	 Estée Lauder	1
7	 Kérastase	1
8	 Charlotte Tilbury	1



**Our analysis found no strong correlation** between the number of unique content types a brand publishes and how frequently they are cited by AI assistants. Brands like Function of Beauty and Clarins had significantly different levels of content diversity, yet similar citation frequency. This suggests that in the beauty category, it's not just about producing more types of content—it's about the right kind of external validation.

**Unique Content Types Sourced:** This measures the variety of content formats about a brand that were used (such as news articles, blog posts, forums, videos, etc.) as citations for the LLMs.

**37%** **Product Pages** on brand websites were used as the top content type as trusted sources / citations.

**37%** **Blog Articles** served as highly visible sources across multiple prompts and topics in the industry.

**12.5%** **Category Pages** were referenced in queries looking for a specific product type like lipstick, blush, etc.

In AI visibility, content trust is earned through presence and repetition. You don't need the fastest website—you need to show up often, across sources, and deliver content in multiple, well-structured formats.

The next generation of beauty brands won't win visibility because their site is technically perfect—they'll win because AI systems know them, cite them, and rely on them to answer user questions.

# General Trends & Insights

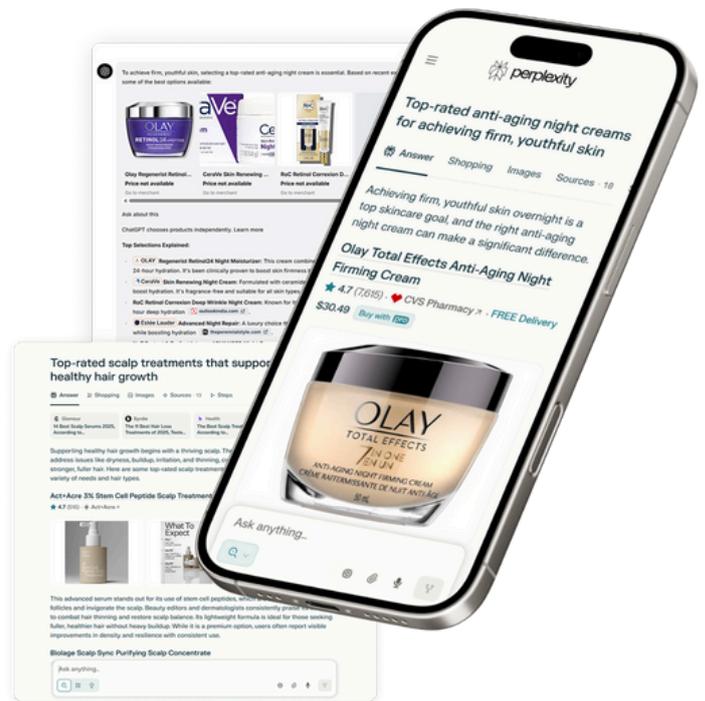
**AI visibility in beauty eCommerce is shaped by more than brand size or product quality—it's the combination of digital presence, sentiment, and third-party validation that determines which brands AI recommends most.**

**Overall Findings:** AI visibility in beauty eCommerce spans diverse categories and brand profiles. The top 10 performers blend legacy giants with younger disruptors, highlighting that broad product ranges, strong consumer reputations, and extensive third-party endorsements significantly influence AI recommendations. Notably, brand sentiment positively correlates with AI visibility ( $r \approx 0.44$ ), underscoring the importance of widespread positive mentions and expert praise.

**Platform Influence:** Brands on non-Shopify platforms, typically larger legacy companies, exhibited higher average visibility compared to Shopify-native brands. However, when Shopify brands appeared, especially in ChatGPT's shopping mode, they ranked slightly higher, demonstrating that digitally-native DTC brands can compete effectively if they break through initial visibility barriers. Legacy brands benefit from broad press coverage, while indie brands must leverage niche contexts or trend-driven queries to emerge.

**Market Segment Insights:** Enterprise scale alone does not guarantee AI prominence. Mid-market and growth-stage brands often performed equally well or better due to strong niche expertise, focused excellence, and consumer advocacy. AI recommendations show meritocratic tendencies, rewarding brands with robust positive coverage and specific consumer buzz rather than merely size or legacy.

**Citations & Content Strategy:** Direct citations of brand-owned content were minimal, emphasizing AI's reliance on external sources, including magazines, influencer opinions, and retailer listings. Brands must therefore amplify external endorsement alongside authoritative SEO-friendly educational content to enhance AI visibility effectively.



**AI Shopping: ChatGPT vs. Perplexity:** Perplexity was aggressive, offering shopping suggestions in 92% of prompts versus ChatGPT's 24%, typically activating on explicit shopping intent queries. Interestingly, ChatGPT showcased Shopify brands disproportionately in these contexts, favoring highly-rated indie brands alongside established names. For brands, this highlights strategic opportunities—Perplexity as a broad visibility platform and ChatGPT for targeted, high-intent engagement.

**Semantic Trends in AI Recommendations:** Queries with clear product-level intent consistently triggered AI shopping responses, whereas brand-level informational queries rarely did. Influencer and trend-driven prompts strongly influenced shopping activation, especially for trendy or socially buzzworthy brands. Brands strongly associated with specific performance outcomes consistently outperformed in relevant queries.

**Actionable Insights:** Brands must holistically manage their online narratives, ensuring visibility across authoritative third-party sources, targeted SEO, and social media advocacy. Clearly positioning hero products with robust social proof and expert endorsements significantly enhances AI-driven discoverability and consumer engagement.

# How to Improve AI Search Visibility

## Proven Strategies Tailored to Beauty eCommerce Based on 2025 AI Visibility Insights

To significantly enhance your AI search visibility, beauty brands should align their strategies with insights drawn directly from our analysis. The following five actions are essential for increasing your brand's AI-driven discoverability and credibility, maximizing your impact on platforms like ChatGPT, Perplexity, and Gemini:

### 01 Optimize for Cross-Channel Consistency

Maintain consistent visibility across DTC, retail, social media, and organic search to strengthen algorithmic recognition and AI recommendations. Ensure your brand content is coherent and uniformly optimized.

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### 02 Amplify Third-Party Endorsements

AI favors brands frequently mentioned by trusted external sources, such as influencers, reviews, and media outlets like Byrdie and Sephora. Focus on placements in high-authority third-party channels.

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### 03 Leverage Product Performance Accolades

Products regularly featured in "best-of" lists or receiving performance accolades are AI-preferred. Consistently secure spots in expert-curated roundups and reviews to boost recommendations.

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### 04 Prioritize AI-Optimized Content and Technical SEO

Produce content that mirrors natural consumer language and optimize your technical SEO (speed, structured data, schema) to ensure prominent AI crawling, indexing, and visibility.

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### 05 Utilize AI Merchant Programs & Shopify MCP

Participate in platforms like Perplexity's Merchant Program and Shopify's MCP for direct influence on AI-driven commerce, preferred placement, consumer insights, and streamlined purchase integrations.

REQUEST A CUSTOM REPORT

# How does your brand stack up in AI Search?

Request a custom AI Search Visibility Report to see where you stand, what's driving your visibility - or holding it back - and how to close the gap. Get tailored insights and actionable strategies built around your brand, your sector, and your competitive landscape.

**Visit** [AvenueZ.com/ai-report](https://avenuez.com/ai-report)

# Sources

01  **ChatGPT**

LLM used for tracking queries in the US based on key prompt and citation research. ChatGPT's deep research was also used for data analysis.

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02  **perplexity**

LLM used for tracking queries in the US based on key prompt and citation research. Perplexity was also utilized for company research.

---

03  **Gemini**

LLM used for tracking queries in the US based on key tags and prompt research across Google Gemini.

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04  **SEMRUSH**

Utilized in sourcing organic website traffic patterns, traffic growth, branded and non-branded traffic.

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05 **HubSpot**

Technical website performance score evaluations through the HubSpot tool gave us a benchmark on technical factors across each website.

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06 **MUCK RACK**

Top-tier media coverage for the companies within this report for sourcing mentions, publications, and key outlets featuring these brands.

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07 **crunchbase**

Company research to determine estimated annual revenue, growth scores, heat scores and company categories.

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07  **Peec AI**

AI visibility prompt tracking to analyze tags, prompts, sources across each brand to help us benchmark over time.

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08  **AI SOV**

Track the overall AI Share of Voice for each brand across the various prompts and tags to establish the SOV scores per brand.

# Research

## 01 Methodology

This proprietary AI Visibility Index was developed through a comprehensive analysis of companies deemed to be in this select industry or sub-sector by other reputable third party entities, using a combination of proprietary search analytics, media monitoring, and listening tools. The study tracked digital footprint, brand mentions, media coverage, top queries, and other key metrics displayed in this report across various AI search agents before the end of July 2025. Companies were evaluated based on visibility metrics including share of voice, sentiment analysis, search volume, and AI visibility trends. Data was normalized across sources to ensure consistency and relevance, and rankings were assigned using a weighted scoring model designed by the research team. The resulting index provides a directional snapshot of brand presence and influence in AI search as the search landscape and driving technology continues to evolve.

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## 04 The Z-Score

The Z-Score is a proprietary metric developed by Avenue Z to quantify a brand's influence within AI search visibility and ranking. This composite score is calculated using a weighted model that incorporates key performance indicators such as keyword authority, search volume, media presence, backlink quality, and engagement velocity. Each factor was selected based on its demonstrated impact on AI-driven visibility and organic discoverability across digital platforms. The weighting system was derived from historical performance patterns and refined through testing against industry benchmarks. The Z-Score serves as a standardized index to compare brand performance, offering a data-driven view of visibility strength in the competitive AI landscape.

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## 07 Contributors

This report was authored by Johnny Hughes, with valuable contributions from Tina Fleming, Rachael Zahn, Tamar Terell, Nick Osler, Kaylee Duong, Lindsey Wolbrink, Luciana Rico, and subject matter experts at Avenue Z. Their research insights, analysis, and expertise played a key role in shaping the findings and perspectives presented throughout this work.

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APPENDIX

# Cosmetics

	Brand	Website	Z-Score
	<b>Charlotte Tilbury</b>	charlottetilbury.com	94.2
	<b>Maybelline</b>	maybelline.com	86.2
	<b>NARS</b>	narscosmetics.com	84.5
	<b>Rare Beauty</b>	rarebeauty.com	82.3
	<b>Urban Decay</b>	urbandecay.com	80.2
	<b>L'Oréal</b>	lorealparisusa.com	79.1
	<b>Fenty Beauty</b>	fentybeauty.com	78.8
	<b>e.l.f. Cosmetics</b>	elfcosmetics.com	72.2
	<b>Tarte</b>	tartecosmetics.com	69.5
	<b>NYX</b>	nyxcosmetics.com	66.7
	<b>MAC</b>	maccosmetics.com	64.6
	<b>Estée Lauder</b>	esteelauder.com	63.5
	<b>Too Faced</b>	toofaced.com	63.1
	<b>Hourglass</b>	hourglasscosmetics.com	62.5
	<b>Huda Beauty</b>	hudabeauty.com	58.6
	<b>Laura Mercier</b>	lauramercier.com	57.5
	<b>ColourPop</b>	colourpop.com	56.3
	<b>Glossier</b>	glossier.com	53.4

APPENDIX

# Cosmetics

	Brand	Website	Z-Score
	<b>HAUS Labs</b>	hauslabs.com	51.3
	<b>IT Cosmetics</b>	itcosmetics.com	49.8
	<b>Rhode</b>	rhodeskin.com	48.5
	<b>Benefit Cosmetics</b>	benefitcosmetics.com	43.6
	<b>Jones Road</b>	jonesroadbeauty.com	36.7
	<b>Revlon</b>	revlon.com	24.0
	<b>Thrive Causemetics</b>	thrivecausemetics.com	19.7

APPENDIX

# Skin Care

	Brand	Website	Z-Score
	<b>CeraVe</b>	cerave.com	96.5
	<b>La Roche-Posay</b>	laroche-posay.us	95.6
	<b>The Ordinary</b>	theordinary.com	86.2
	<b>SkinCeuticals</b>	skinceuticals.com	74.5
	<b>Neutrogena</b>	neutrogena.com	65.7
	<b>Tatcha</b>	tatcha.com	65.6
	<b>Glow Recipe</b>	glowrecipe.com	56.0
	<b>First Aid Beauty</b>	firstaidbeauty.com	55.9
	<b>OLAY</b>	olay.com	53.6
	<b>Supergoop</b>	supergoop.com	51.5
	<b>Clarins</b>	clarinsusa.com	50.1
	<b>LANEIGE</b>	us.laneige.com	50.0
	<b>OSEA</b>	oseamalibu.com	47.2
	<b>Drunk Elephant</b>	drunkelephant.com	47.2
	<b>LUSH</b>	lush.com	41.3
	<b>Summer Fridays</b>	summerfridays.com	40.8
	<b>Primally Pure</b>	primallypure.com	29.2
	<b>Aesop</b>	aesop.com	23.0
	<b>Sol de Janeiro</b>	soldejaneiro.com	15.8

## APPENDIX

# Hair Care

	Brand	Website	Z-Score
	<b>Living Proof</b>	livingproof.com	84.9
	<b>Olaplex</b>	olaplex.com	83.9
	<b>amika</b>	loveamika.com	83.9
	<b>Kérastase</b>	kerastase-usa.com	83.5
	<b>Briogeo</b>	briogehair.com	78.4
	<b>Redken</b>	redken.com	77.4
	<b>Moroccan Oil</b>	moroccanoil.com	71.1
	<b>OUAI</b>	theouai.com	69.4
	<b>Pureology</b>	pureology.com	69.3
	<b>Oribe</b>	oribe.com	68.7
	<b>K18</b>	k18hair.com	62.6
	<b>Prose</b>	prose.com	62.3
	<b>Function of Beauty</b>	functionofbeauty.com	59.4
	<b>Color WOW</b>	colorwowhair.com	41.7
	<b>Verb</b>	verbproducts.com	36.7
	<b>Native</b>	nativecos.com	21.4

# Avenue Z

## Where Innovation Meets Influence: Proven Solutions for AI-Driven Search

Avenue Z is the leading marketing and communications agency pioneering AI optimization to drive influence across every channel—from ChatGPT to The Wall Street Journal to TikTok. With 30+ years of expertise in search and content marketing, Avenue Z helps brands grow revenue, build reputation, and shape public perception. Our AI Optimization Solution is the first and most comprehensive solution to unify strategic communications, digital marketing, and performance media under one roof:



### Strategic Communications

Crisis Management, Financial Communications, Public Affairs, Branding, Thought Leadership and Corporate Communications, and more.



### PR & Media Relations

Media Outreach & Placement, Executive Positioning, Press Release Development, Media Training, Social Media Integration, and Event Publicity.



### AI Optimization

Strategic Content Development, AI Technical Optimization, Reputable Media Placements paired with time-tested SEO Strategy and Tactics.



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Social Media, Copywriting, SEO & AI Search Content, Podcasting, Creative Studio, Website Design & Development, and Branded Content Development.



### Paid Media

Monitor how often and where your brand appears in AI responses, and use that data as a new benchmark for reputation and reach.

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