

Figure 4: Top 10 AI Inflections * Importance, November 2025

	AI Inflections * Importance	AI Inflections	AI Importance
KTB	3.76	59%	6.36
ONON	2.83	53%	5.33
COLM	2.18	35%	6.26
M	2.01	31%	6.40
SHOO	1.63	90%	1.81
MGM	1.57	44%	3.59
GOLF	1.54	47%	3.28
VFC	1.52	60%	2.55
BKE	1.50	59%	2.55
BBY	1.44	22%	6.58

Source: Optimal Advisory analysis, Similarweb

Figure 5: Retailers, November 2025

	AI Inflections * Importance	AI Inflections	AI Importance
M	2.01	31%	6.40
BBY	1.44	22%	6.58
WMT	1.32	25%	5.36
MLKN	1.17	10%	11.58
DECK	1.12	20%	5.56
WSM	0.91	55%	1.66
GME	0.80	49%	1.63
KSS	0.72	30%	2.40
LOW	0.70	12%	5.59
DKS	0.67	13%	5.27
TSCO	0.66	18%	3.59
W	0.64	9%	6.88
TGT	0.45	12%	3.89
BJ	0.41	16%	2.61
ASO	0.24	19%	1.24
TJX	0.11	37%	0.30
DLTR	0.08	13%	0.61
BBWI	0.07	37%	0.20
AD	0.05	11%	0.45
KR	0.03	8%	0.41
COST	0.03	4%	0.68
DG	0.01	1%	0.36
HD	-0.09	-1%	6.10
ACI	-0.09	-21%	0.43
FIVE	-0.09	-17%	0.56
URBN	-0.22	-10%	2.14
SIG	-0.64	-17%	3.88

Source: Optimal Advisory analysis, Similarweb

Figure 6: Leisure, Accommodations, & Travel, November 2025

	AI Inflections * Importance	AI Inflections	AI Importance
MGM	1.57	44%	3.59
HLT	0.58	33%	1.74
MAR	0.44	19%	2.25
NCLH	0.41	12%	3.42
CCL	0.39	11%	3.57
AAL	0.31	18%	1.66
VIK	0.15	23%	0.64
UAL	0.12	8%	1.54
WH	0.11	12%	0.95
LUV	0.10	10%	1.03
ALK	0.08	6%	1.24
H	0.07	3%	2.15
EXPE	0.04	1%	3.60
BKNG	0.01	0%	3.15
RCL	0.01	0%	2.77
DAL	-0.12	-10%	1.22
CHH	-0.13	-23%	0.55
ABNB	-0.24	-11%	2.21

Source: Optimal Advisory analysis, Similarweb

Figure 7: Automotive, November 2025

	AI Inflections * Importance	AI Inflections	AI Importance
HOG	1.27	44%	2.87
AZO	1.03	38%	2.72
CVNA	0.32	16%	1.98
ORLY	0.25	19%	1.35
GPC	0.24	10%	2.33
AAP	0.19	8%	2.34
GM	0.19	16%	1.19
KMX	0.12	5%	2.46
RIVN	-0.03	-1%	4.19
PAG	-0.06	-2%	2.99
TSLA	-0.11	-3%	3.44
F	-0.15	-6%	2.58

Source: Optimal Advisory analysis, Similarweb

Figure 8: Apparel & Golf, November 2025

	AI Inflections * Importance	AI Inflections	AI Importance
KTB	3.76	59%	6.36
ONON	2.83	53%	5.33
COLM	2.18	35%	6.26
SHOO	1.63	90%	1.81
GOLF	1.54	47%	3.28
VFC	1.52	60%	2.55
BKE	1.50	59%	2.55
WWW	1.39	43%	3.22
RL	1.33	41%	3.24
HBI	1.31	15%	8.69
AS	0.82	17%	4.87
PVH	0.56	26%	2.13
BOOT	0.55	65%	0.86
LULU	0.52	22%	2.39
AEO	0.49	13%	3.69
MODG	0.46	27%	1.71
VSCO	0.43	34%	1.28
NKE	0.38	23%	1.65
CROX	0.38	40%	0.95
CRI	0.30	15%	2.09
UA	0.28	8%	3.32
TPR	0.22	20%	1.10
GAP	0.08	14%	0.56
BIRK	-0.30	-15%	1.98

Source: Optimal Advisory analysis, Similarweb