

Even the number one brand is invisible when it matters most: Butterfly Network

Handheld point-of-care ultrasound, category leader. *Independent analysis using public data and public AI answers. Not commissioned by or affiliated with Butterfly Network.*

17 queries across four archetypes and five stages	34 AI answers, ChatGPT and Perplexity	0 of 14 problem- and solution-stage answers naming the brand
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Why this company

Chosen against a strict test: the clinician is the primary buyer, so the person asking AI is the person deciding; one product does genuinely different clinical jobs, so real buyer archetypes exist; and the company is large enough that gaps would be meaningful. Several better-known companies were rejected because they failed one of these, most often because the buyer was procurement or pharma rather than the clinician.

How the buyer was mapped

- **Four archetypes by clinical job, not specialty.** Procedural guidance (seeing under the skin in real time), emergency triage (a fast answer in a crashing patient), focused diagnosis (a targeted read of one organ), quick measurement (one quantified answer). Each with its own exams, specialties and buying triggers.
- **Overlaps flagged as a feature.** A cardiac scan is focused diagnosis in clinic and emergency triage on a crashing patient. Context-dependent archetypes were recorded, not forced into one box.
- **Scope stated.** Core adult hospital and point-of-care settings. Paediatric, veterinary, military and ophthalmic uses deliberately excluded, and said so.

How the capture was controlled

- 17 English queries fixed in advance: 4 problem, 3 solution, 4 category, 3 vendor, 3 objection.
- ChatGPT and Perplexity, logged out, incognito, fresh chat per query. 34 answers total.
- **Layered scoring adapted to the market:** clinicians already know ultrasound exists, so each answer was scored on three layers: was ultrasound mentioned, was a handheld option mentioned, was Butterfly named. The brand can lose at any layer, and only layered scoring shows which.
- Every Perplexity citation classified by source type and split by whether Butterfly was present or absent.

What the method found

- **A funnel cliff by stage, not by archetype.** Ultrasound was recommended in 34 of 34 answers. A handheld option was mentioned in 0 of 6 solution-stage answers. Butterfly was named in 0 of 14 problem- and solution-stage answers, then in 13 of 14 device-comparison answers, ahead of every competitor.
- **Category-level invisibility, not competitive loss.** No vendor of any kind appeared at the problem or solution stage. The brand wins the buying conversation; the buying conversation starts too late.
- **The mechanism, from the sources.** Answers without Butterfly drew mainly on academic and clinical-education pages that teach the technique and never name a device. Answers with Butterfly drew on buying guides, forums and vendor sites. The brand lives in the buying world and is absent from the technique world.

Output

Capture sheet, scorecard workbook (presence by stage and archetype, competitor appearance, source classes by presence), and a report with conditional recommendations: technique-level content answering the problem queries, presence in the clinical-education sources AI trusts, and a quarterly KPI: handheld-mentioned and brand-named rates at problem and solution stage, tracked from a 0% baseline.

Recommendations, not delivered results. Captured from the Netherlands; the finding rests on source type rather than regional brand preference, but capture location is a stated limitation.